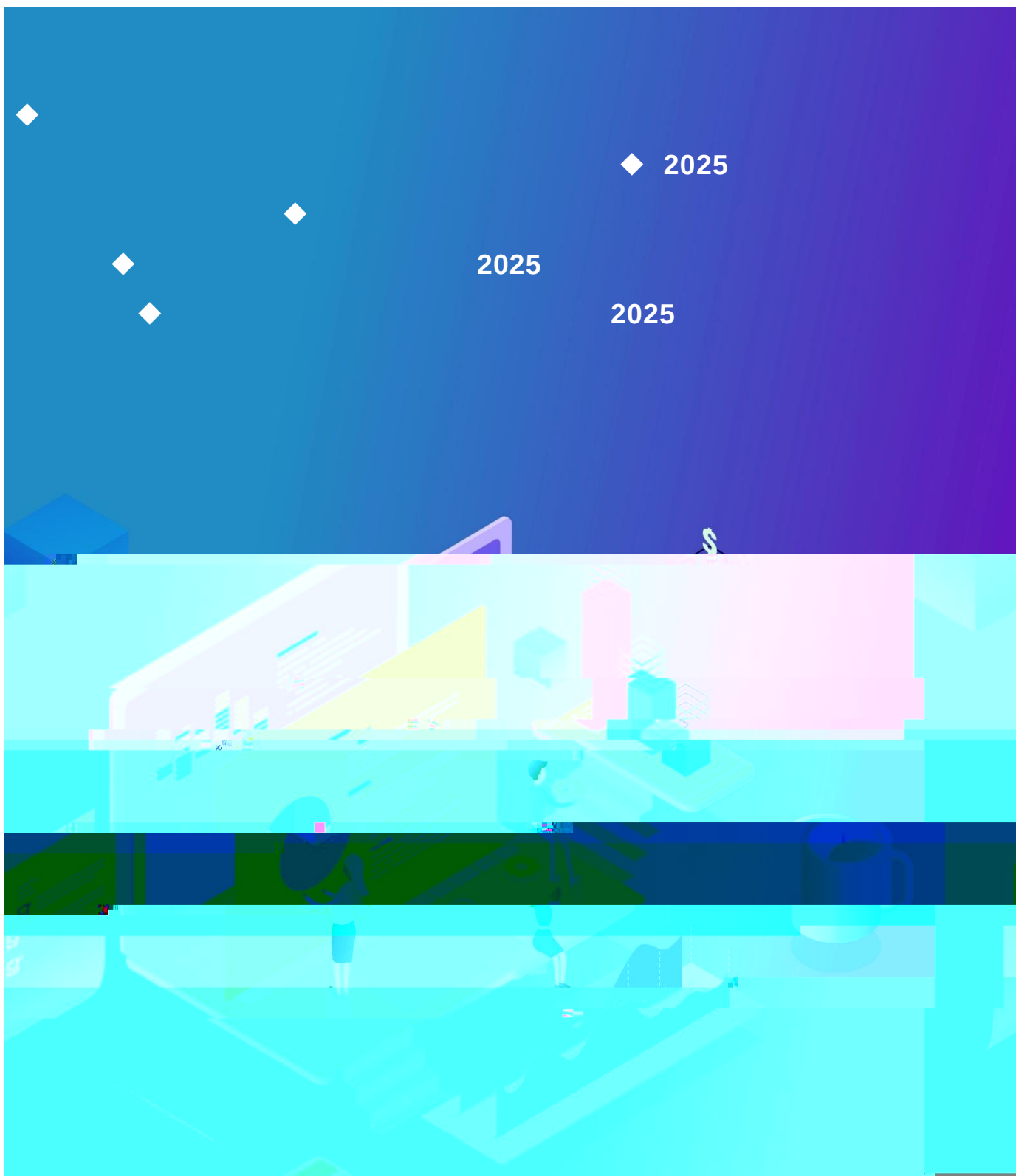






01

	03
2025	03
	04
2025	05
2025	05

02

“ IP ”	06
	06
100	07
2024	07
	08
280 EFLOPS	08

03

2025	09
	09
2025	10
	10

04

APNIC IPv6 50%	11
APNIC NAT IPv6	11
GARR eduVPN	11

05

2024	12
	12
IDC 210	12
EDUCAUSE 2025	13



」



- 22
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22.

“ ‘ ’ ”

IPv6

” “

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“ ”

” “

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2025

6 16



2025

2025

7

“ “ ”

” “

”





“ IP

”

IP L4

ICT

IP

IP
L4

C114_____

	2024			2024	
43255	23638	58885		15.58%	9.8%
12.9%		3.78	1.1	2.6	
	25.2%				

	2024		
30	16632	38.5%	30-40
	10113	42.8%	35
31497	53.5%		

“ ”

“ ”





100

7

4.01

6.1%

2612

6.5%

AI

AI

2024

AI

8

1 8

179%

122.64%

74.24%

72.48%

10.49%

AI

AI

/

7

4921.9

3%

453.2

5.7%

2024

TOP 10

营业收入(亿元)	同比增长
36.29	-6.75%
33.15	-26.44%
30.43	-5.87%
27.19	-19.71%
24.29	40.29%
21.19	-5.87%
18.19	-19.71%
15.19	-19.71%
12.19	-19.71%
9.19	-19.71%

毛利润(亿元)	同比增长
19.48	42.19%
17.21	-8.44%
15.19	-8.44%
13.19	36.46%
11.19	63.55%
9.19	-8.44%
7.19	36.46%
5.19	63.55%
3.19	-8.44%
1.19	36.46%

营业收入(亿元)	同比增长
1.07	0.10%
1.61	77.36%
0.42	-37.40%
0.21	-126.66%
0.11	-126.66%
0.05	-126.66%
0.02	-126.66%
0.01	-126.66%
0.01	-126.66%
0.01	-126.66%



1.

2025

2027

30

1000

6



280 EFLOPS

2024

4.5

61.5%

“ ”

2024

41.06



2025

4	18	2025	27
	395.18		352.31
(294.48)	(259.14)		(226.09)
(216.22)		64.67%	30%



2025

“

2.0 ”,



APNIC IPv6 50%

		APNIC Labs			IPv6	
56	IPv6	30			50%	
IPv6		2025	4	22		64% IPv6
	50%	45.28%	8.1			



2024

2024

10

30

30

“

”

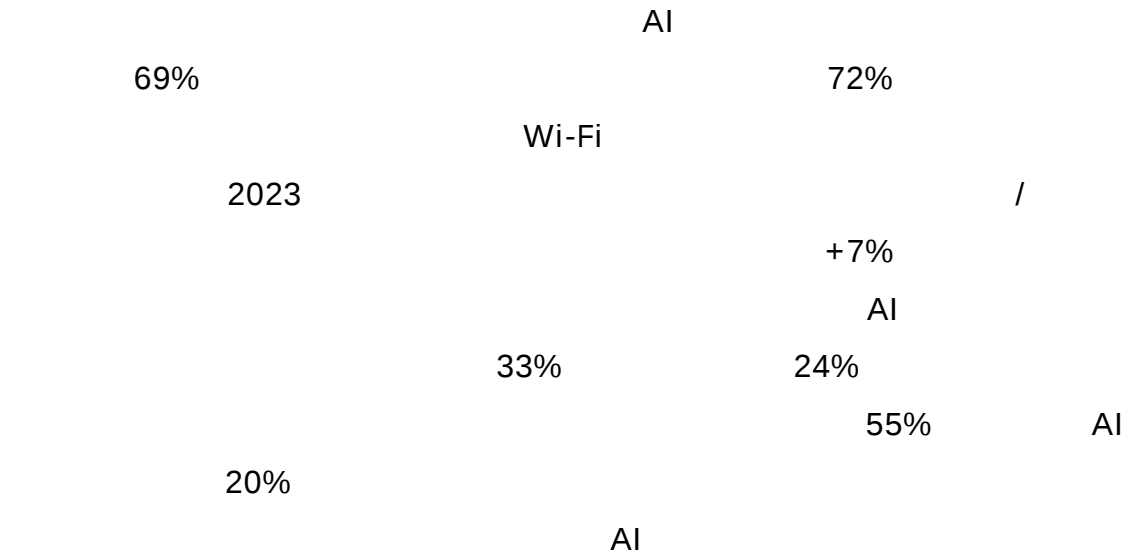
2024

“

” “



EDUCAUSE 2025



- _____
- _____ 2024 +AI _____
- Brand Finance 2025 150
- _____ & :2025 _____
- _____ & 2024 _____

- _____ AI _____



scgl@cernet.com

