



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





- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.
- 21.
- 22.

" ' ' "

IPv6

" "

" "

" "

" "

"

"

" "

"





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%
20.43	5.97%
4.67	-19.71%
3.58	40.29%

毛利(亿元)	同比增长
12.69	63.55%
12.28	-8.44%
10.49	36.46%

毛利(亿元)	同比增长
1.07	0.40%
0.42	-37.40%
0.11	26.68%
0.11	37.50%
0.08	-0.48%



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" ,

G



APNIC

IPv6

50%

APNIC Labs

IPv6

56

IPv6

30

50%

IPv6

2025 4 22

64% IPv6

50%

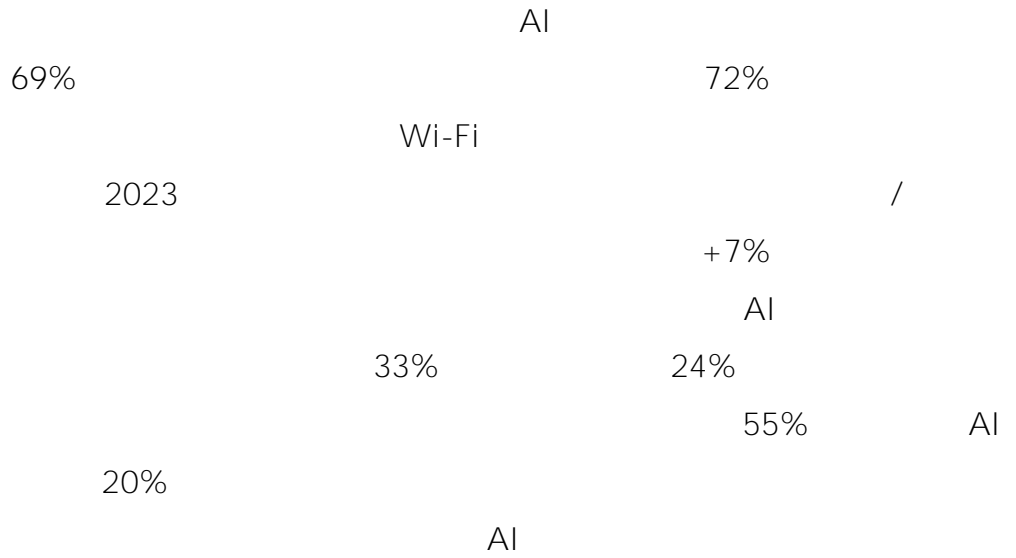
45.28% 8.1



2024	2024		
2024		30	10
			30
		"	"
	2024		
	"		" "



EDUCAUSE 2025



EDUCAUSE_____

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



scgl@cernet.com

