



# 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    | 公司   |
|----------|---------|------|
| 6.29     | -6.75%  | 深信服  |
| 3.15     | -26.44% | 启明星辰 |
| 24.67    | -19.71% | 电科网安 |
| 23.58    | 40.29%  | 绿盟科技 |
| 20.43    | 5.97%   | 启信智  |

| 毛利润(亿元) | 同比增长   | 公司         |
|---------|--------|------------|
| 32.20   | 8.97%  | 深信服        |
| 42.19   | 24.1%  | 奇安信        |
| 19.48   | 25.17% | 启明星辰       |
| 17.21   | -8.46% | 天融信        |
| 12.69   | 63.55% | 绿盟科技       |
| 12.28   | -8.44% | 安恒信息       |
| 10.49   | 36.46% | 亚信安全(安全业务) |

| 营业收入(亿元) | 同比增长     | 公司  |
|----------|----------|-----|
| 1.07     | 0.70%    | 深信服 |
| 0.42     | -37.40%  | 深信服 |
| 0.42     | 0.70%    | 深信服 |
| 0.42     | -126.66% | 深信服 |
| 0.42     | 0.70%    | 深信服 |



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

30

10

30

"

"

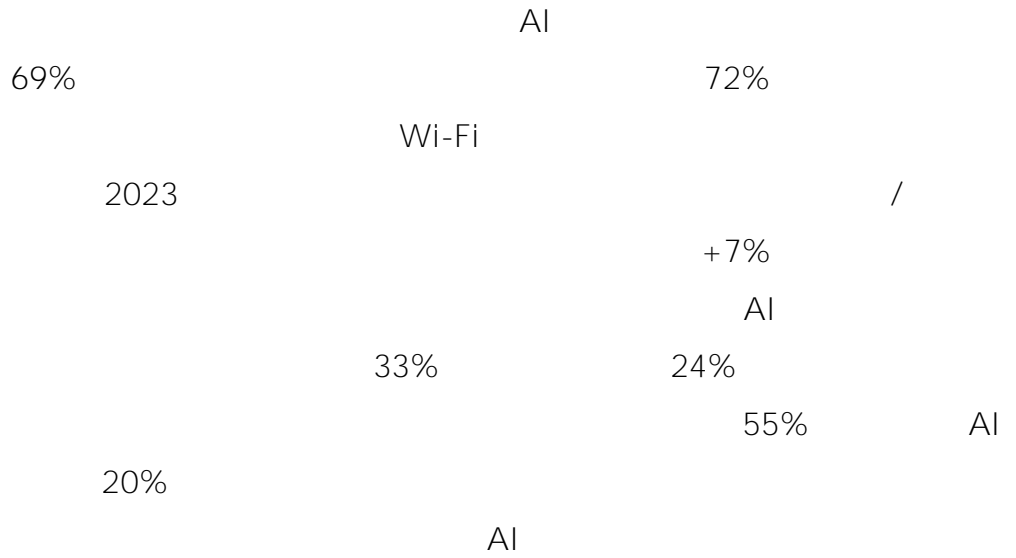
2024

"

" "



# EDUCAUSE 2025



EDUCAUSE\_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_ 2024 +AI \_\_\_\_\_
- Brand Finance 2025 150
- \_\_\_\_\_ & :2025 \_\_\_\_\_
- \_\_\_\_\_ & \_\_\_\_\_ 2024 \_\_\_\_\_
- \_\_\_\_\_ AI \_\_\_\_\_



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