





IPv6	2024	03
	2024-2026	03
	2024	04
	30	04
		05
	3	05
2024	IPv6	05
		06
		06
		06
	2024—2027	07
	2023	07
	2023	07
		08
	2024	08
		08
		09
	18 “ + ”	09
	“ ”	09
		10
FCC		10
Jisc eduroam		10
		10
		11



2024 2024 IPv6 8
IPv6 6.5 IPv6 23% IPv6
65% IPv6
IPv6
95% IPv6 IPv6
IPv6 IPv6
“ IPv6+ ” IPv6
50 IPv6
IPv6 IPv6
IPv6 IPv6

2024 2026 3



4 20

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30

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3

2024 6 14 24:00

2023 12	IPv6	7.78	IPv6
60.88%	IPv6	19.57%	IPv6
IPv6		IPv6	IPv6
IPv6		IPv6	
IPv6			“ ” “ ”



4 11

200

3200

AI

128



40

14

“ 2+4+31+X+O ”

“ 1+N+X ”

11

12

“ N+X ”





2027

2035

2023

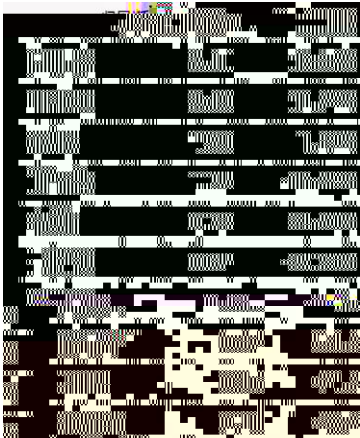
AI

2024

AI

	营业总收入(亿元)	同比增长
奇安信	64.42	3.53%
启明星辰	45.07	1.58%
深信服(安全业务)	38.92	-0.14%
天融信	31.24	-11.81%
电科网安	30.73	-10.62%
启明星辰	21.70	9.60%
国投智能	19.84	-12.98%
三六零(安全及其他)	17.65	-1.48%
绿盟科技	16.81	-36.06%
亚信安全	16.66	-0.56%

	毛利润(亿元)	同比增长
奇安信	42.12	1.62%
深信服(安全业务)	31.62	0.76%
启明星辰	26.03	-7.82%
天融信	18.81	0.79%
安恒信息	13.41	-3.77%
电科网安	13.01	15.40%
三六零(安全及其他)	9.54	-4.02%
国投智能	9.13	-11.91%
绿盟科技	7.76	-25.90%
亚信安全	7.69	-9.41%





403.9 40.4 363.5

312.57 2024 31.25

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5000 4000 6000



[2024]72

5000

1.75% 1 2 1 P

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18 “

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FCC

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FCC

C114_____

Jisc Cradlepoint
eduroam

Sky Business
eduroam

4G 5G

eduroam

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CLR

“ CLR2.0 ”

AI

EDUCAUSE_____

DRI

JISC_____

JISC

45%

2035

JISC_____





scgl@cernet.com



赛尔网络
CERNET