Panel 3:
Why is the 100GbE Single Lambda a Compelling Investment?

Moderator: Scott Kipp - Brocade, President of the Ethernet Alliance

Jimmy Yu – Dell'Oro

Subu Subrahmanyan – Juda Group

Dale Murray – LightCounting

Chris Cole - Finisar

Disclaimer

The views expressed in this presentation are the views of the presenter and not the Ethernet Alliance.

Agenda

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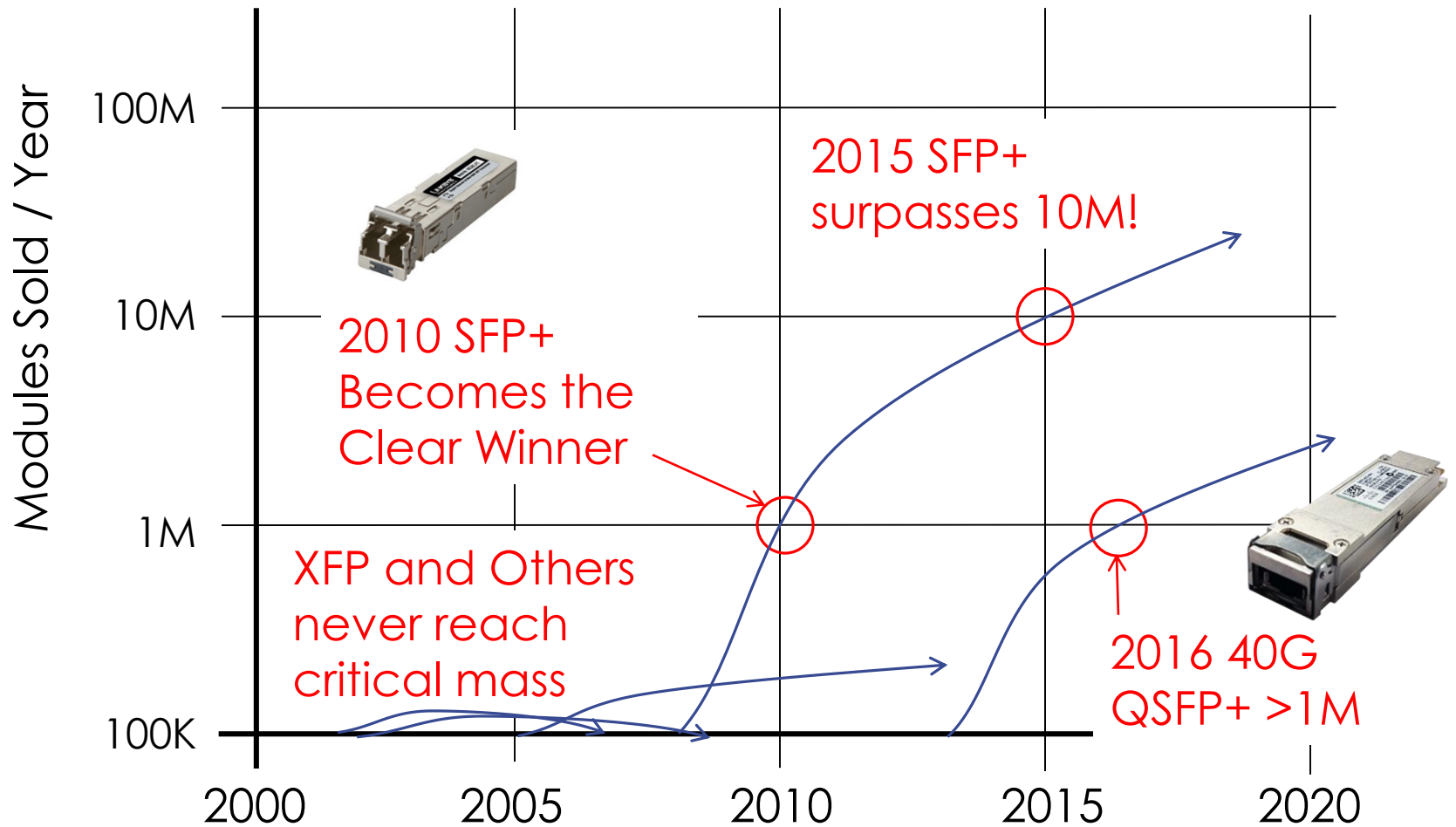| Panel 3: Why is 100GbE per Lambda a Compelling Investment? Session Chair: Scott Kipp	
Introduction to Panel 3	9:00 - 9:010
Jummy Yu (Dell'Oro)	9:10 - 9:30
Subu Subrahmanyan (Juda Group)	9:30 - 9:50
Dale Murray (LightCounting)	9:50 - 10:10
Chris Cole (Finisar)	10:10 - 10:30
Panel Discussion	10:30 - 11:00

Ethernet Alliance Roadmap

Find more at:
www.ethernetalliance.org/subcommittees/roadmapping-subcommittee/

Name	Speed	Date Standard Ratified
10Mb/s Ethernet	10 Mb/s	1983
100Mb/s Ethernet	100Mb/s	1995
Gigabit Ethernet	1 Gb/s	1998
10 Gigabit Ethernet	10 Gb/s	2002
40 Gigabit Ethernet	40 Gb/s	2010
100 Gigabit Ethernet	100 Gb/s	2010
400 Gigabit Ethernet	400 Gb/s	2017 (est.)*

*Estimated on a 4-year standardization process that started with the CFI in March 2013
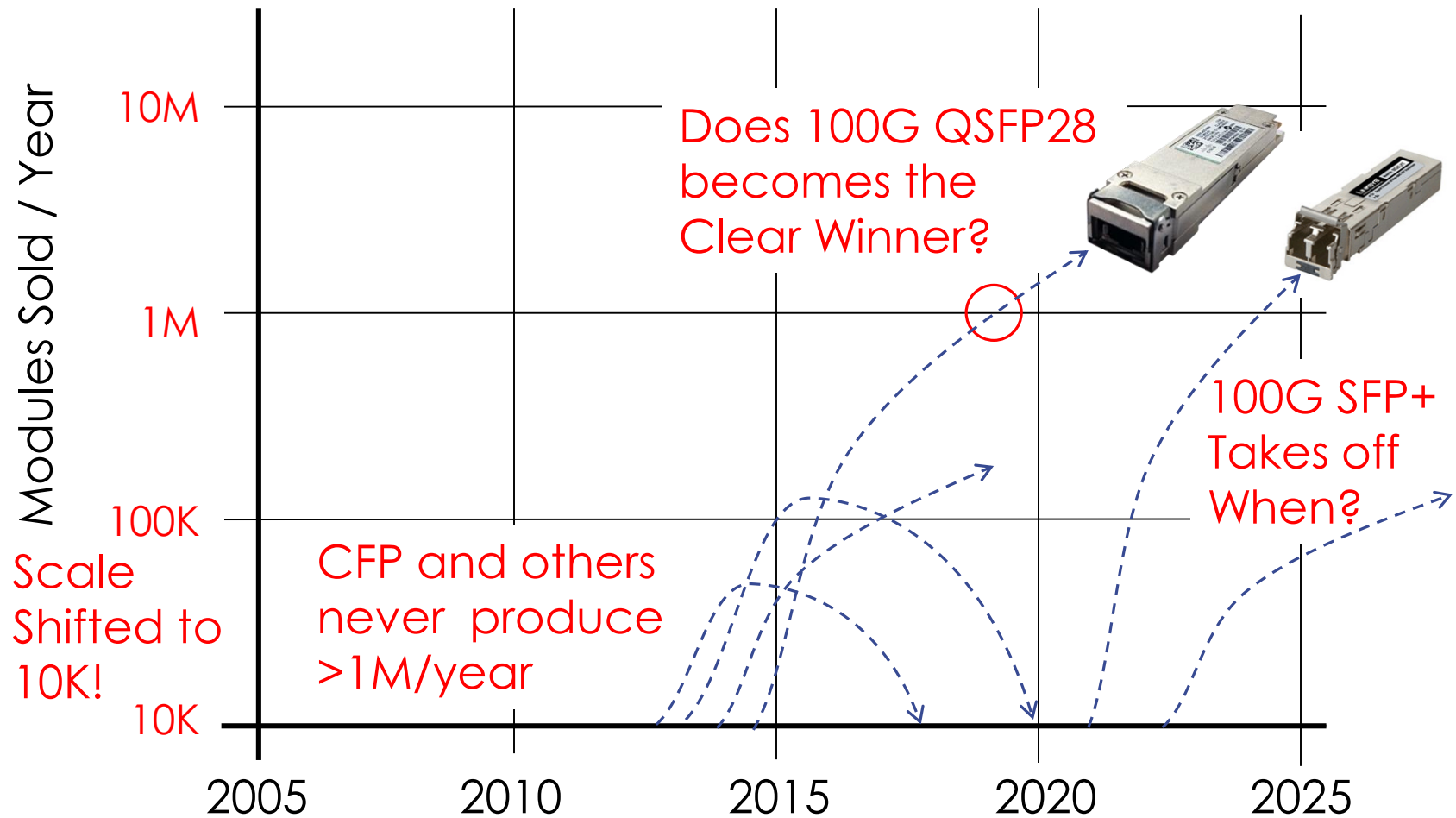
10G Recap – SFP+ Wins!

Modules Sold / Year (y-axis, logarithmic: 100K, 1M, 10M, 100M)

X-axis: 2000, 2005, 2010, 2015, 2020

2015 SFP+ surpasses 10M!

2010 SFP+ Becomes the Clear Winner

XFP and Others never reach critical mass

2016 40G QSFP+ >1M

Based on LightCounting Forecasts

40G – Where are we?
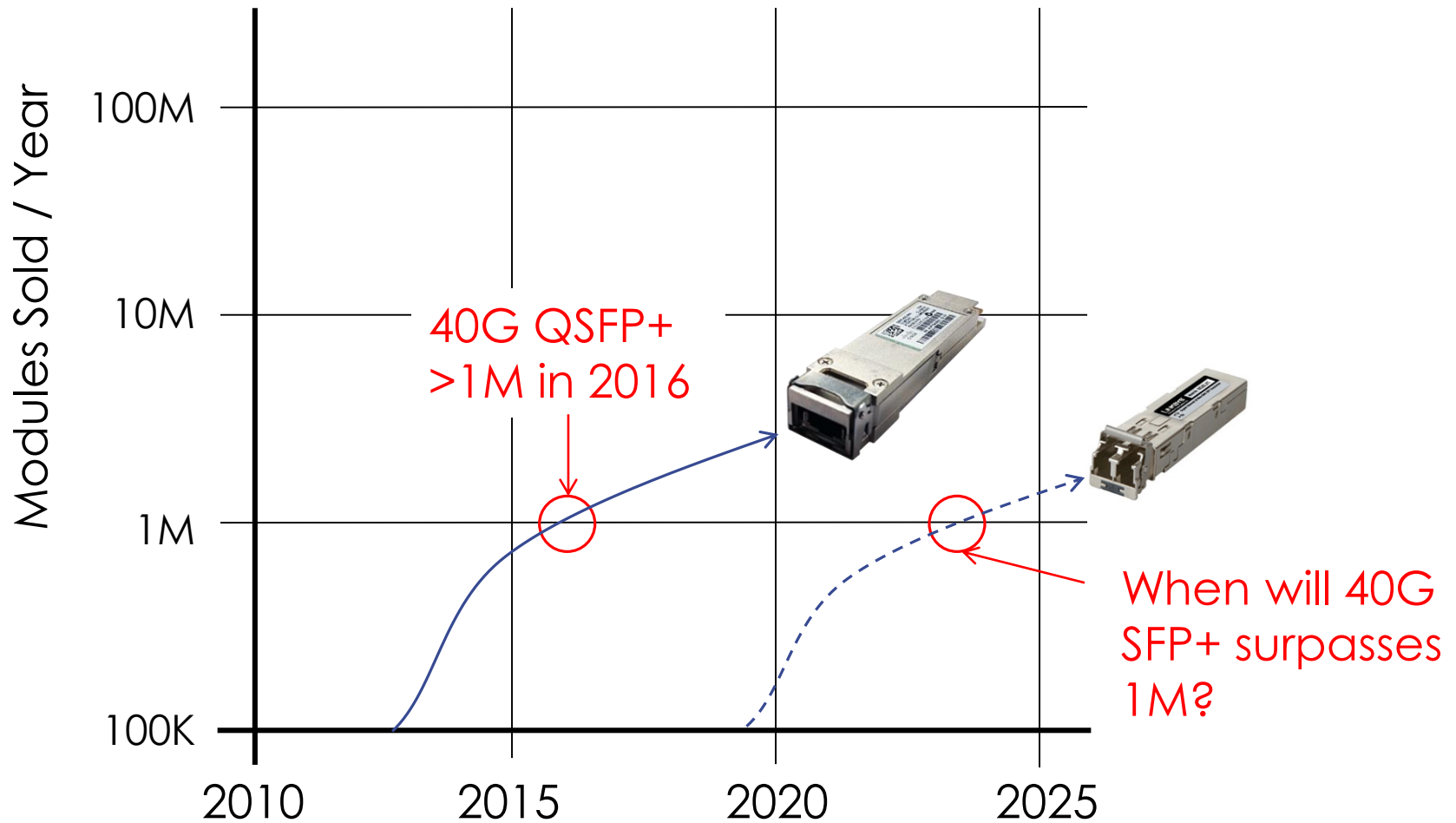
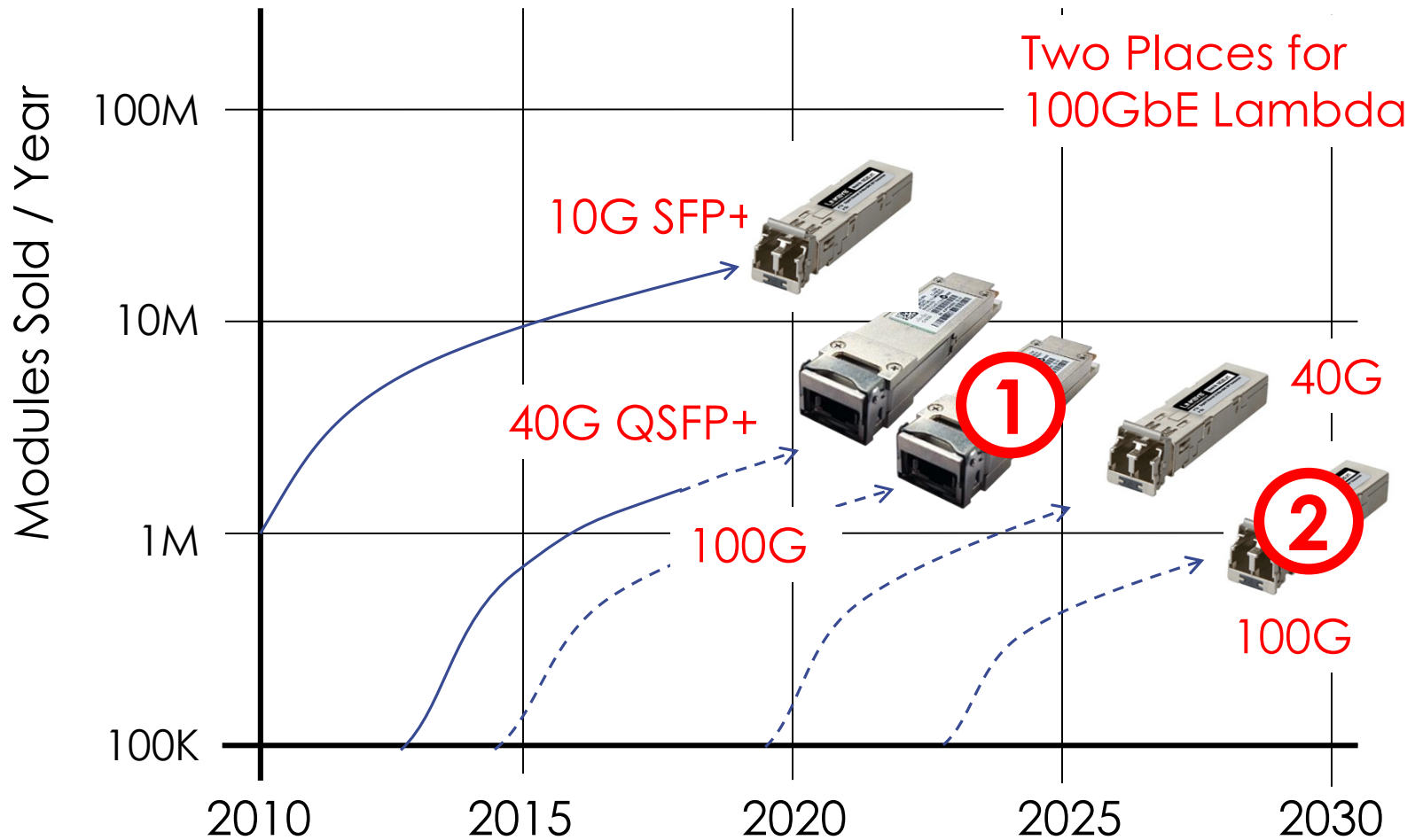QSFP+ Up to 2016 Based on LightCounting Forecasts

100G – An Odd Twist on 10G?

Does 100G QSFP28 becomes the Clear Winner?

100G SFP+ Takes off When?

Scale Shifted to 10K!

CFP and others never produce >1M/year

Modules Sold / Year

10M

1M

100K

10K

2005   2010   2015   2020   2025

Based on General Trends

400G – Still Developing

Putting It All Together

Two Places for 100GbE Lambda

Modules Sold / Year

100M

10M

1M

100K

10G SFP+

40G QSFP+

100G

① ②

40G

100G

2010   2015   2020   2025   2030
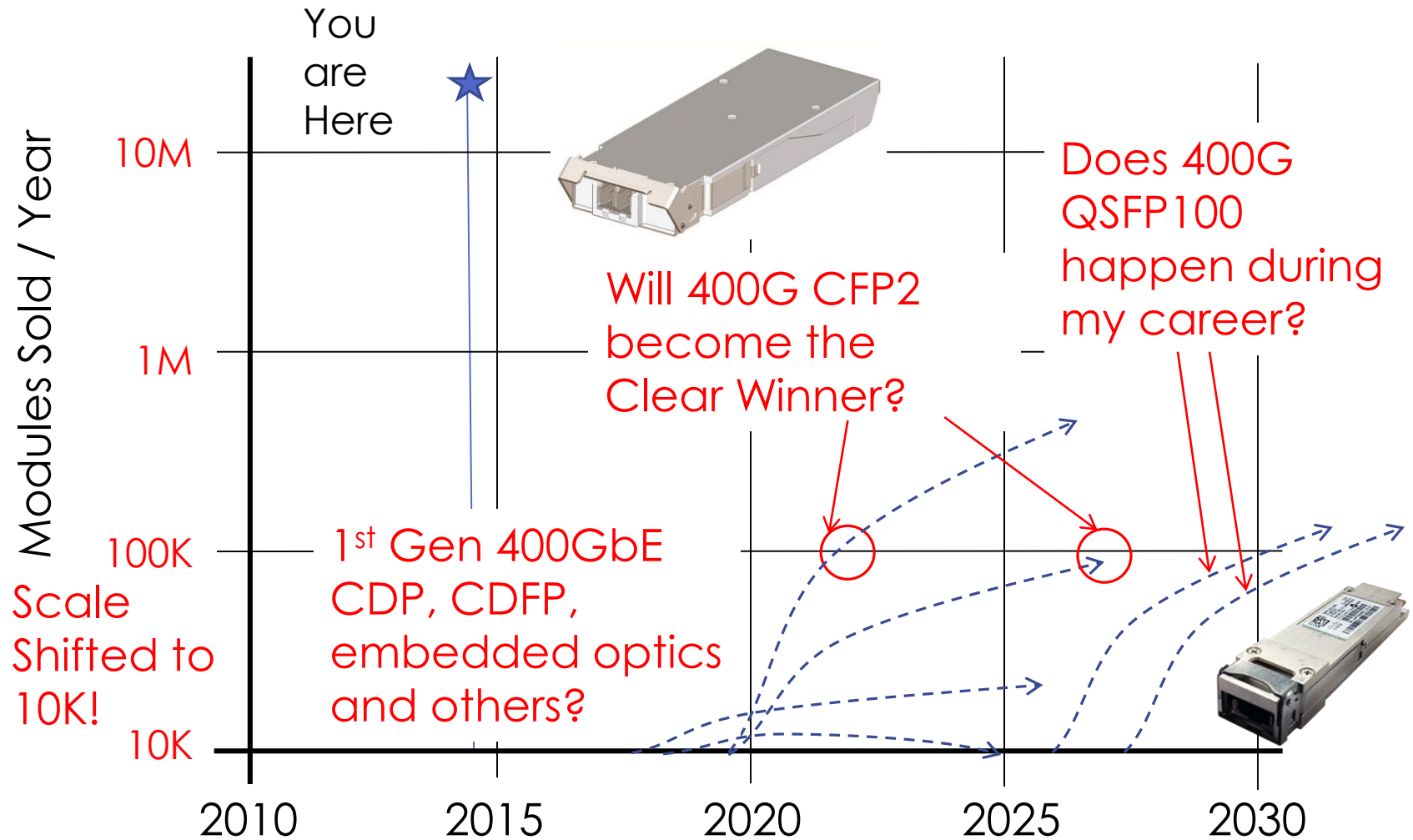
Based on General Trends

The Holy Cup of 100GbE Lambda

- The first company to publicly demonstrate a 100GbE Single Lambda in a 3.5W QSFP28 that goes 2 km over SMF will win the Holy Cup*

"Your Name Here"

*See details on Ethernet Alliance website soon

The Holy Grail of 100GbE SFP+

- The first company to publicly demonstrate a 100GbE SFP+ that goes 2 km over SMF in under 1.5W will win the Holy Grail*

"Your Name Here"

*See details on Ethernet Alliance website soon

What's a good investment?

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Good or Great ROI!
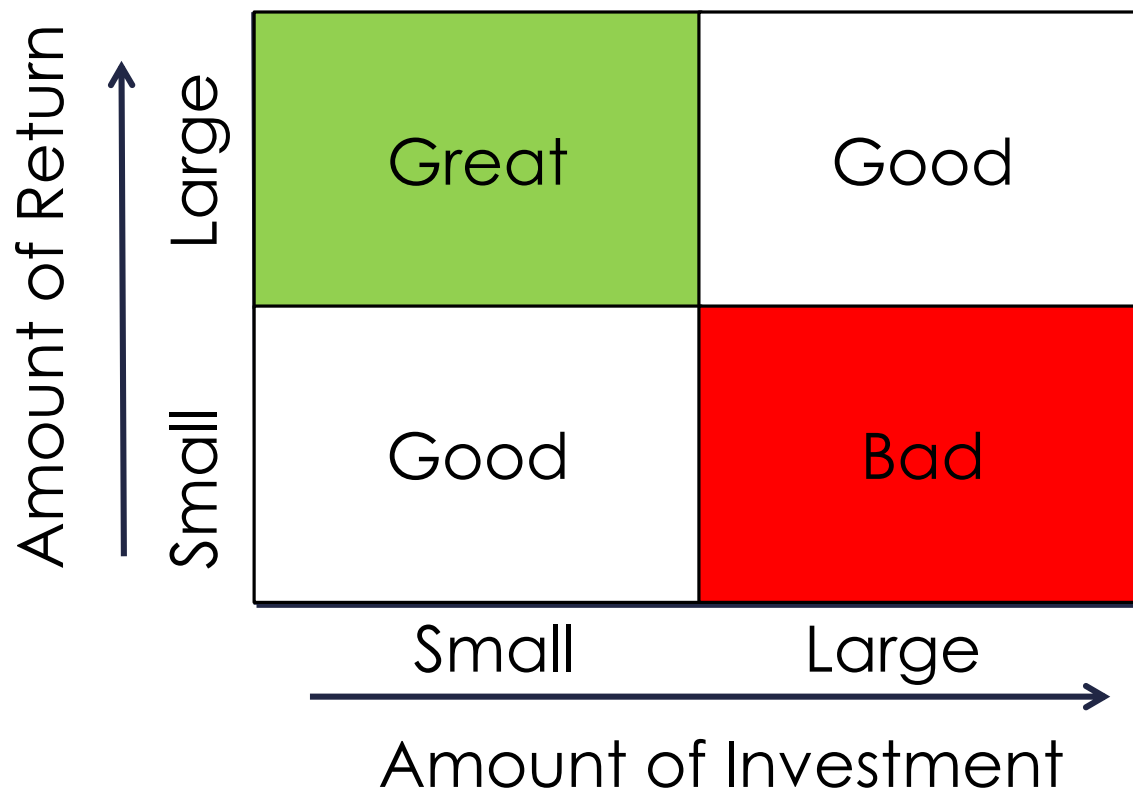
When will 100GbE single lambda be a good investment?

100GbE Single Lambda Investments

- Telecom is deploying 400G Systems today!
- 100G Single Lambda already being deployed in DWDM systems today
- Our panelists will discuss how these systems can trickle down into Ethernet and when it might happen…