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# ETHERNET ALLIANCE TECHNOLOGY EXPLORATION FORUM “THE ROAD TO ETHERNET 2026”

The Future Ethernet Data Center

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September 29, 2016



ethernet alliance



This presentation is intended to educate and promote the exchange of information. Opinions expressed during this presentation are the views of the presenters, and should not be considered the views or positions of the Ethernet Alliance





# PANELISTS

- Alan Weckel – Dell'Oro Group
- Frank Yang – Commscope
- Darcy Phillips – Panduit
- Thomas Scheibe – Cisco

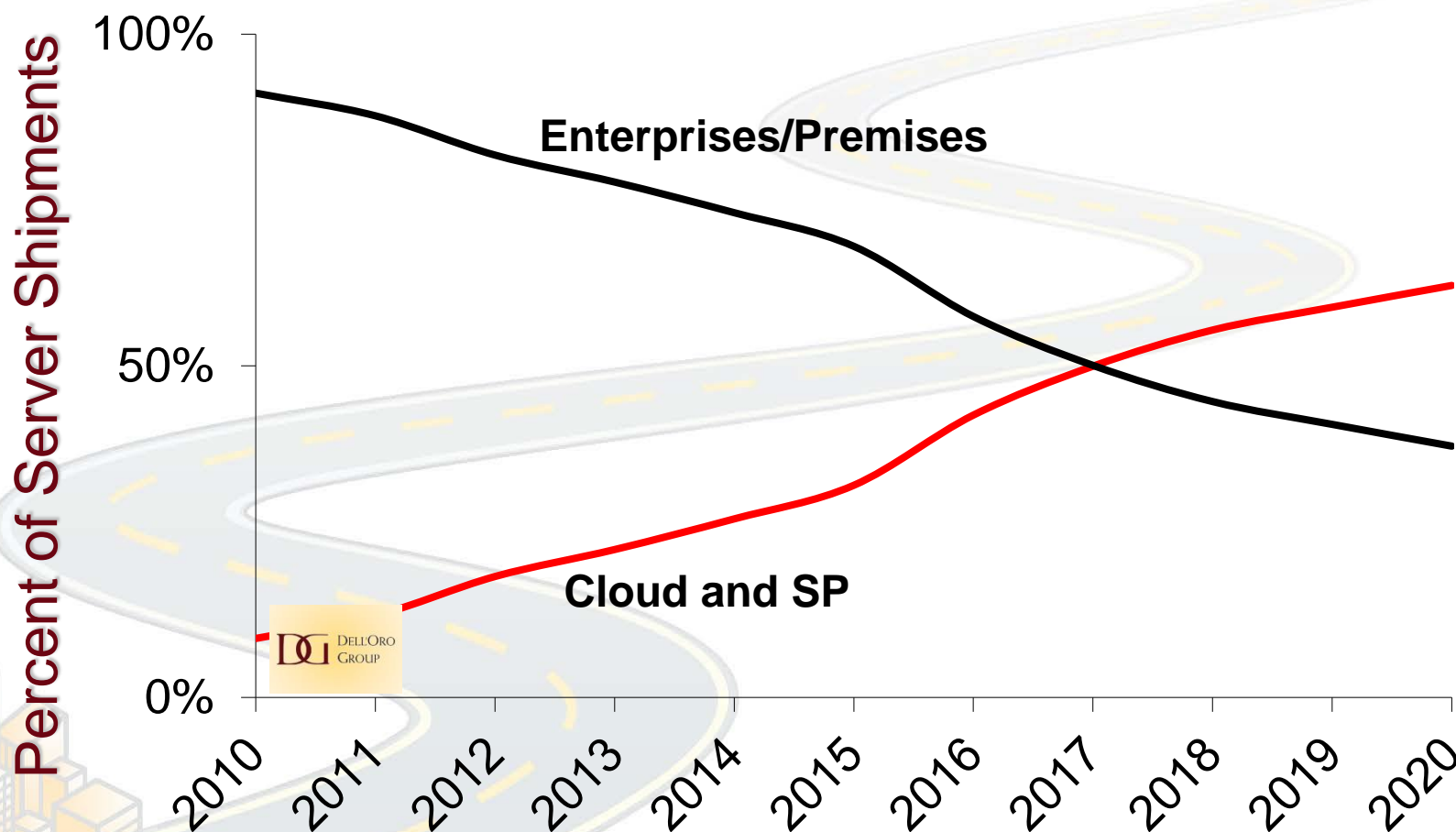




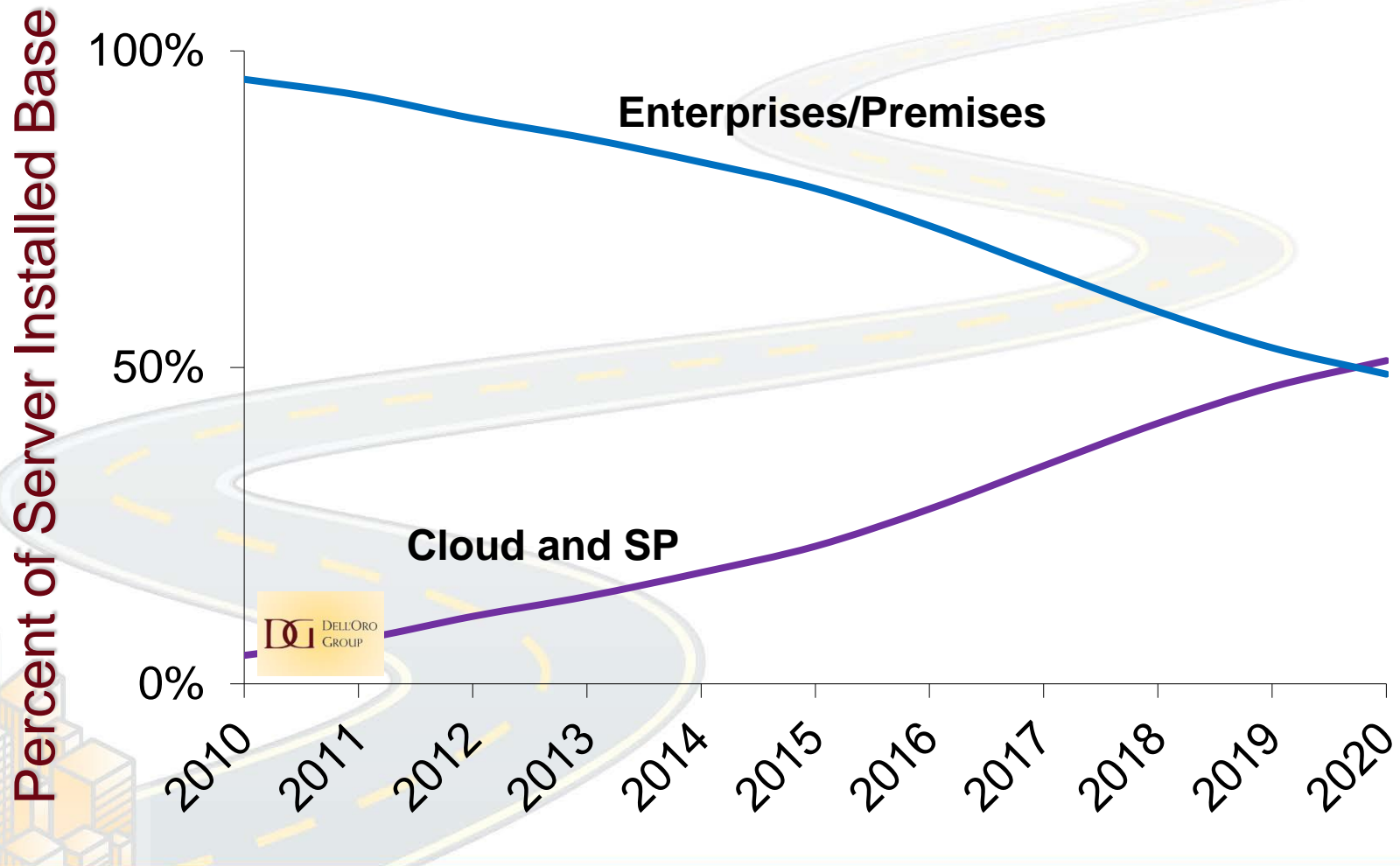
# Market Level Trends

Alan Weckel – Vice President of Ethernet Switch  
Market Research at Dell'Oro Group  
[alan@delloro.com](mailto:alan@delloro.com)

# Annual Server Shipments – The Cloud Gets Larger

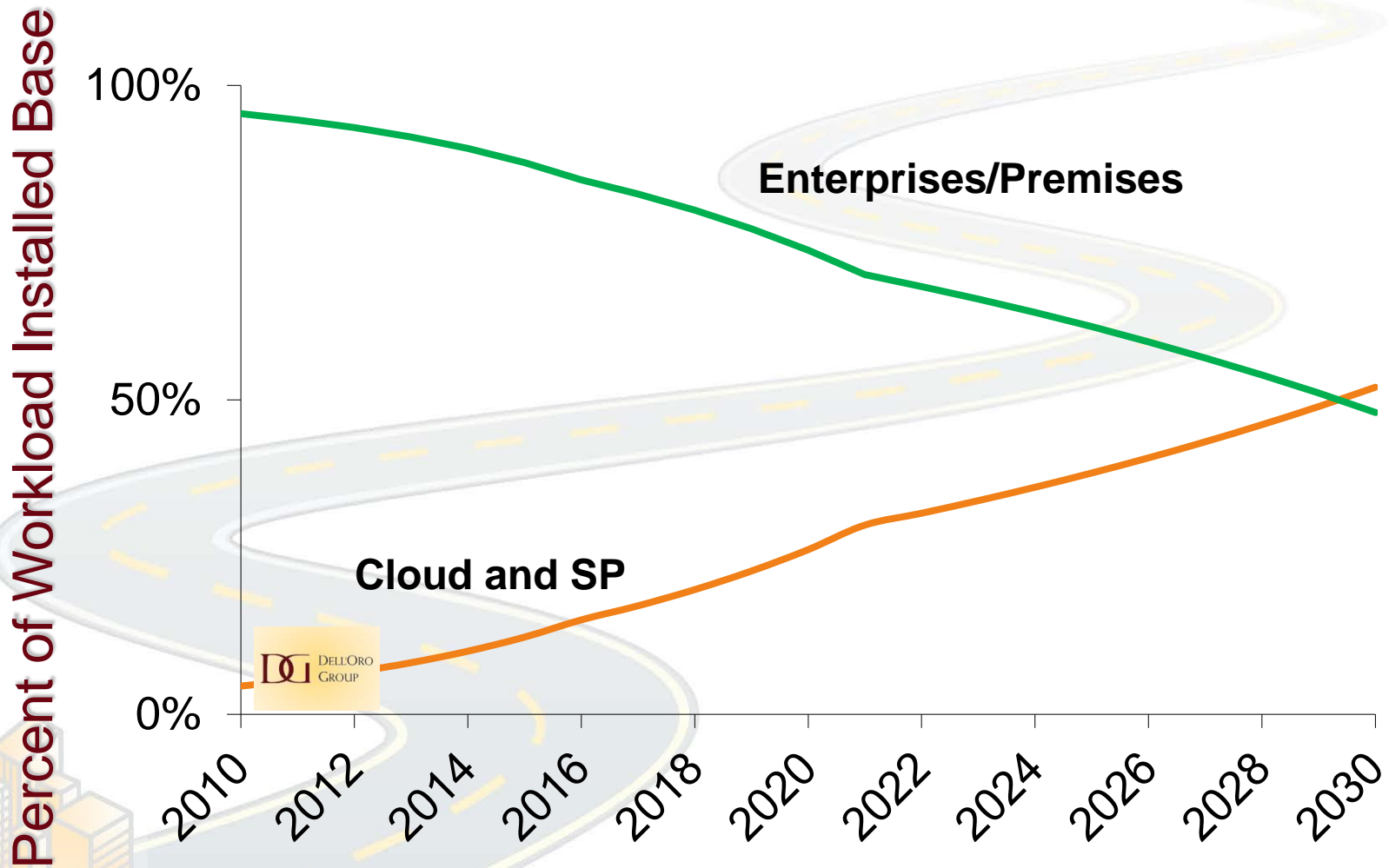


# Server Installed Base





# Workload/Application Installed Base



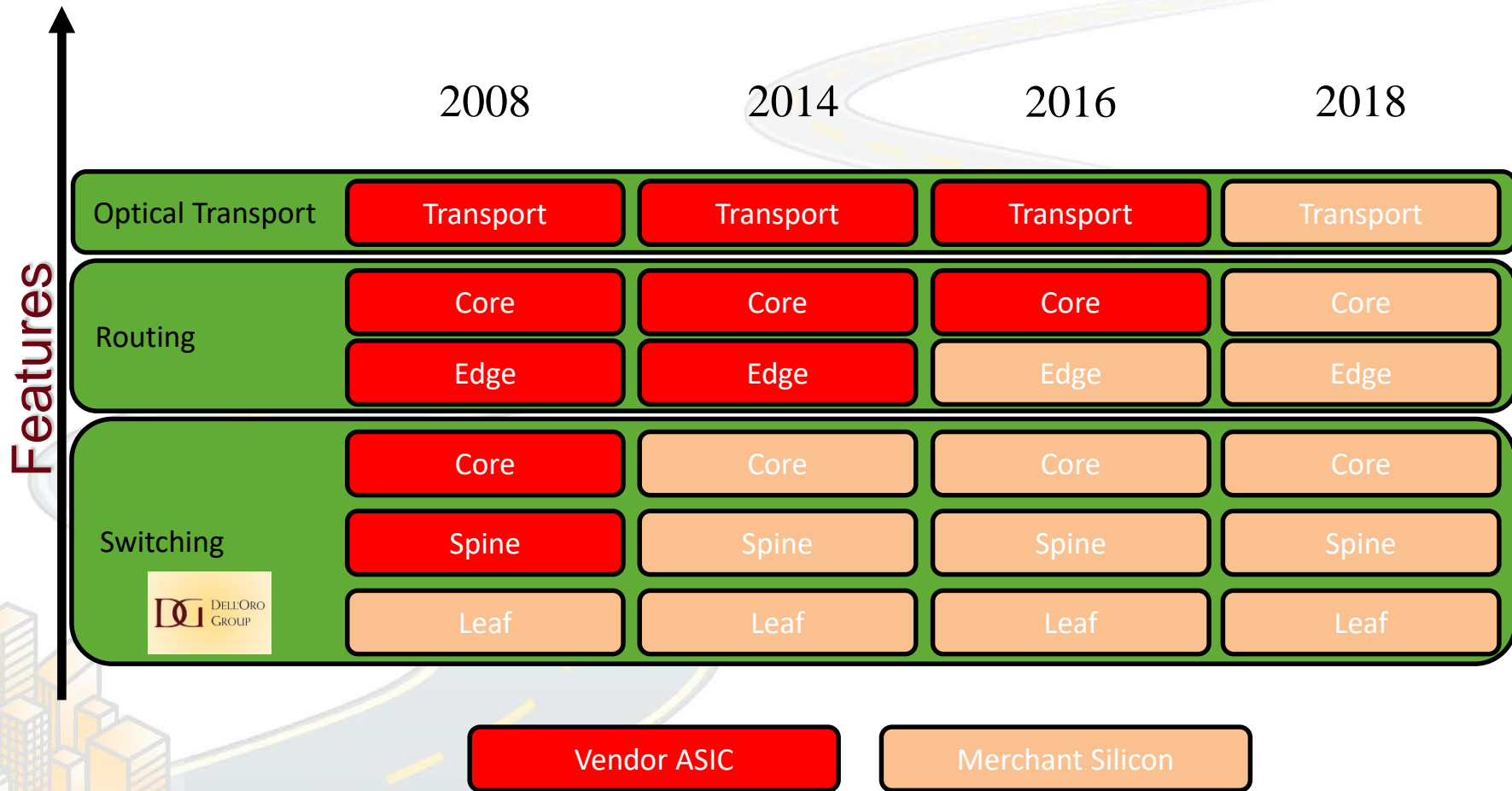


# Select Companies' Server Installed Base 1H16

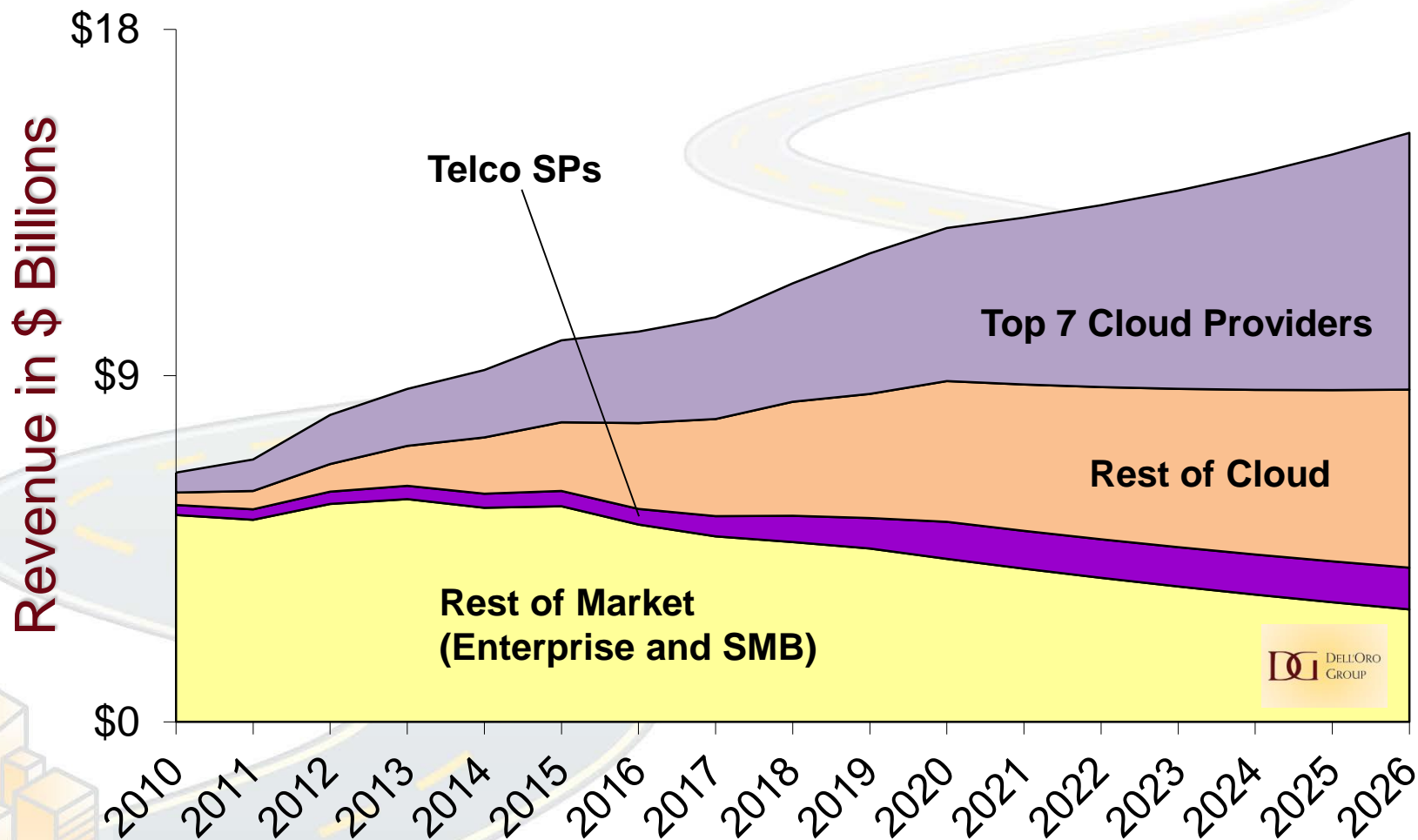




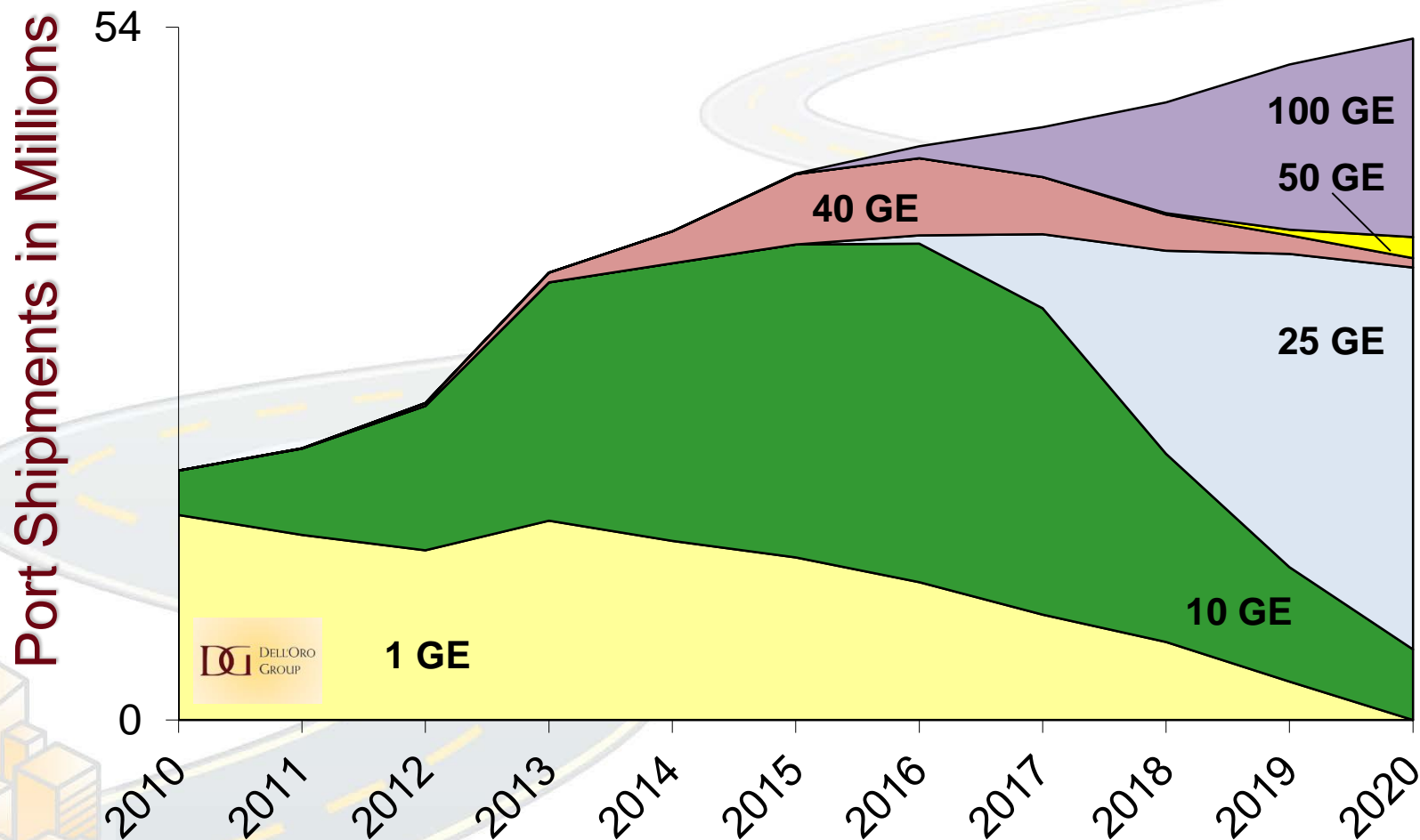
# Merchant Silicon – Influence on Mega Cloud Providers



# Ethernet Switch – Data Center Revenue



# Ethernet Switch – Data Center Port Shipments





# Major Inflection Points Coming

- Machine Learning and Artificial Intelligence use a different type of compute and network connectivity than what the Cloud uses today
- Ethernet and merchant silicon are increasing the TAM for the switching market
- Bifurcation of port speeds and form factors
- Rate of adoption and growth change as the Cloud market matures



If you have any questions or comments,  
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