



ACG RESEARCH

Growing Importance Of DCI In
Optical Network Markets
OFC 2015

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ACG Optical Syndicated Services

- *Architecture, Technology Transformations*
- *Product Forecasts, Marketshare Reports*
- *Leading Use Cases, Business Drivers*
- *Custom Analysis, Consulting*

Agenda

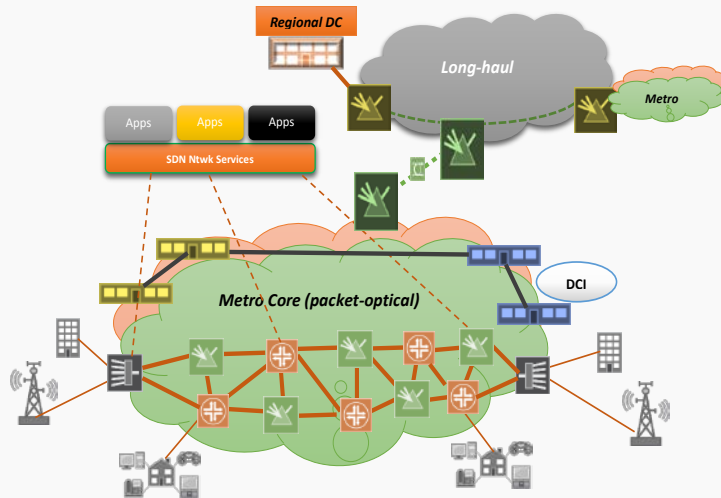
- Introductions
- DCI Drivers?
- DCI Network Implementations?
- DCI Market Segments/Forecast

DCI Drivers?

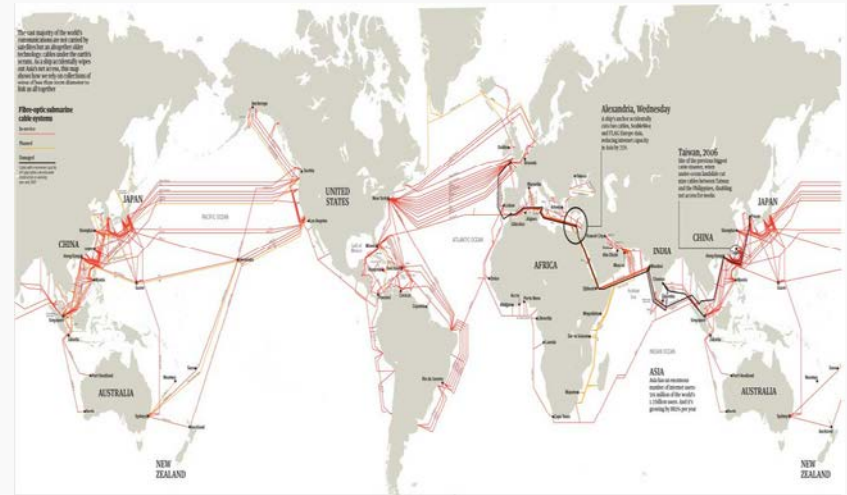
- **Richness of cloud-based applications increasing:**
 - Web-scale Business, Social Networking, IoT, Collaboration
 - Hybrid/Public CloudaaS
- **Applications scaled and delivered - multiple geographies:**
 - Services outgrow individual DCs – New DCs built/connected
 - Providers enter new geographies – DCs built/connected
- **Need for high capacity, low latency, elastic DCI solutions**

DCI Network Implementations?

Metro / Campus DCI

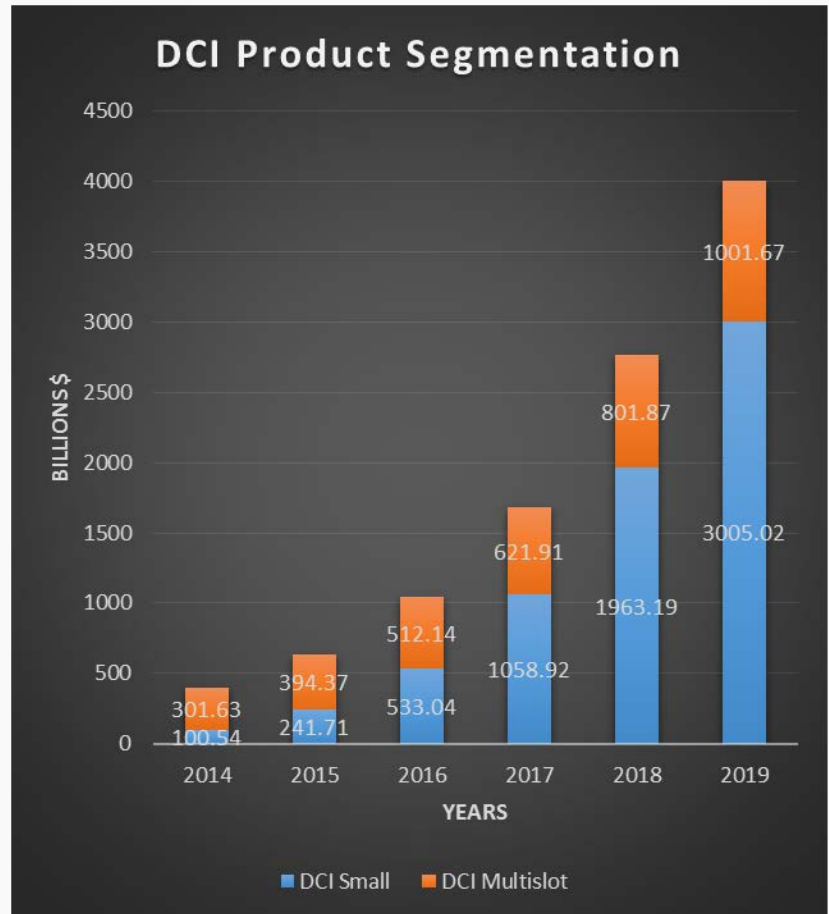
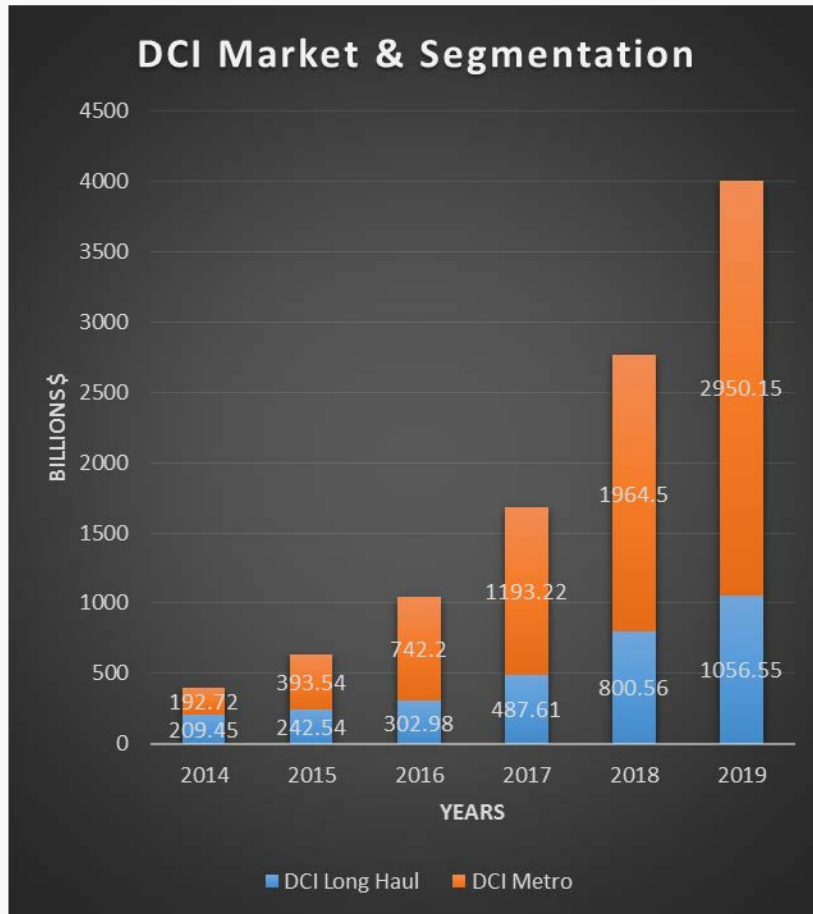


Long Haul DCI



Source DC	Destination DC	Deployment Type	Example DC
Enterprise	Cloud SP	Metro / Campus	NY Times, Amazon
Cloud SP	Same Cloud SP	Metro / Campus	Amazon, Rackspace
Cloud SP	Different Cloud SP	Metro / Campus	Amazon, Verizon
Enterprise	Cloud SP	Long Haul	GE, Salesforce
Cloud SP	Same Cloud SP	Long Haul	Microsoft, Google
Cloud SP	Different Cloud SP	Long Haul	Rackspace, Equinix

DCI Market Segments/Forecast



DCI Segments Emerging

- **Total High-Speed DCI Market Forecasted to Grow:**
 - \$4B by 2019/ 58.4% CAGR 2014 –2019
- **DCI Market Will Bifurcate - Small and Multi-slot Form Factor:**
 - **Growth for Small FF:** \$3B by 2019/ 97.3% CAGR 2014–2019
 - **Growth for Multi-slot FF:** \$1B by 2019/27.5% CAGR 2014–2019
- **Dimensions of the DCI Market:**
 - Optical DCI
 - Packet DCI
 - SDN DCI

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