

## Global 40/100G market update: 2H09

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### Abstracts

While 40G revenues for ON systems line cards are still fairly modest compared with 10G, the number of operators deploying the technology are too many to list. Globally, network operators have spent nearly \$391 million in the 4Q period ending 2Q09 deploying the technology. The rapid price decline of 10G along with decreased spending resulting from poor economic conditions are constraining demand. Router-interconnect remains the largest application but 4x10G muxponding is growing, especially for undersea applications. Ovum expects 40/100G market volume to grow 79% annually through 2014. Nokia Siemens continues to lead the market in port deployments but Nortel, Huawei, and Cisco have closed the gap. 100G is right around the corner and we will see the first revenue-generating deployments beginning in 2010.

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Executive summary

In a nutshell

Ovum view

40G deployments are widespread; 100G market developing quickly

40G is a necessary stepping stone to 100G

40G deployments are slowing in 2H09, casting shadow on forecast

What we count and what we don't

100G graduates to the next phase; deployments will take a couple of years

40G market segment analysis

Major market developments

North America leads deployments to date

China deployments are growing rapidly

Nokia Siemens leads 1H09 global 40G market, which rose 56% over 2H08

Out with the old, in with the new (modulation format)

Interconnection between core routers is still the largest application; use for undersea upgrades is increasing

40G for subsea applications

Economic slowdown curtailing 40G spending in 2H09; industry hype is now focused on 100G

Overall market health (or lack of health) can drastically affect the pace of innovation and deployments

The path to 100G is paved with 40G

40G is an important stepping stone but 100G is the ultimate goal

100G decisions will impact 40G also

From hero experiments to field trials

Providing a 40G-to-100G upgrade path is critical for success

Adoption of 100G is still years away

Datacom is the volume market for 100GE and 40GE

Components can be a critical path

First to market doesn't guarantee market leadership; volume does

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