NBASE-T
#TeamSport Moves the Industry
Webinar Speakers

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Dell’Oro Group
Dell’Oro Group – The Trusted Source

- Founded in 1995 with headquarters in the heart of Silicon Valley
- Market research firm for Telecommunications, Networks and Data Center infrastructure industries
- The Gold Standard – we provide accurate, un-biased data and insights in the industry
A review of the past 30+ years of Ethernet

How many networking technologies have we seen come and go? Remember Local Talk? Token Ring? VG AnyLAN? What major breakthroughs have we seen with Ethernet?
Story of the NBASE-T Alliance
NBASE-T Alliance

- **NBASE-T Alliance** ([www.nbaset.org](http://www.nbaset.org))
  - Vendor alliance for 2.5G/5G BASE-T

- Member companies representing all areas of network infrastructure including components, silicon, systems, cabling, testing equipment

- More than 60 member companies from 2014-2019

- Helped enable development and deployment of NBASE-T technology that is now in hundreds of shipping products and more applications than originally imagined
## NBASE-T Alliance Members

### Promoter
- AQUANTIA
- MARVELL
- CISCO
- NXP
- INTEL
- XILINX

### Contributor
- bel MAGNETIC SOLUTIONS
- COMMSCOPE
- PANDUIT
- BROADCOM
- FLUKE
- QUALCOMM
- cadence
- IDEAL NETWORKS
- LDE
- CME Consulting
- Kinnex A
- iol
NBASE-T Alliance Adopter Members
The purpose of the NBASE-T Alliance is to provide a platform for the industry to facilitate wide deployment of NBASE-T technology and products.

The purpose of the NBASE-T Alliance is to facilitate and encourage widespread use and deployment of 2.5G and 5G Ethernet. This is done through promotion of the IEEE802.3bz standard, publication of specifications, sponsorship and implementation of interoperability and certification programs, and general marketing activities.

The purpose of the NBASE-T Alliance is to facilitate, encourage and expand the widespread use and deployment of 2.5G and 5G BASE-T Ethernet. This is accomplished through promotion of the IEEE 802.3bz standard, publication of specifications, sponsorship of interoperability programs, education in the market about the multiple applications of the technology, and extensive marketing activities.
Value of NBASE-T Technology

Leverages more than 1.3+ billion Cat5e/Cat6 outlets and more than 70 billion meters of Cat5e/Cat6 cables that make up greater than 90% of the current installed base.

Enables network evolution by providing up to 10x faster speed without pulling cables or requiring building construction.

Supports high-speed links to next generation WiFi access points and high-data rate client PC and workstation systems.
Global sales of copper cabling in LAN, million outlets/drops, 2015 – 2021

Source: BSRIA survey and modelling May 2017
NBASE-T Application Areas

**Enterprise:**
- Switch
- Wireless AP
- Desktop
- Storage
- Small Cell

**Industrial:**
- Switch
- Wireless AP
- Workstation
- Storage
- Compute
- Machine Vision

**Home:**
- Switch
- Wireless AP
- Storage Server
- Home Gateway
- Streaming Media

**Service Provider:**
- Small Cell
- Home Gateway
Product Examples
Teaming up with Ethernet Alliance
Ethernet Alliance Mission

Our Mission and Priorities

We are a global community of system vendors, component suppliers and academia

➢ Our Mission
  • Promote technologies and products based on existing and emerging IEEE 802 Ethernet standards
  • Accelerate industry adoption
  • Demonstrate multi-vendor interoperability

➢ Our Priorities
  • Resources Interoperability
  • Marketing Awareness & Education

The Voice of Ethernet
Ethernet Alliance Merger Benefits

- Established organization
- Complementary mission and structure
- Shared members and leadership
- Existing relationship, e.g. joint plugfests
- Preserves NBASE-T brand, IPR, collateral
A Tribute
to the Engineers, Scientists and
the Ecosystem That Enabled NBASE-T
Looking at the next five years of Ethernet

What are some of the major trends?
Any significant new vendors we should be watching?
Can Ethernet continue indefinitely?
About NBASE-T

How does the uptake of NBASE-T compare with prior speeds?
What will NBASE-T enable?
Would you rather be developing the next Drano product?
Worldwide L2 + L3 Ethernet Switch Port Shipments (January 2019)
NBASE-T & Wireless
WLAN’s Impact on Ethernet Switch Revenue (preliminary)

Revenue in $ Billions

- Ethernet Substituted by WLAN
- Ethernet Aggregating WLAN APs
#TeamSport
“NBASE-T technology is significantly impacting the market with the biggest transition we’ve seen in campus switching since 2000.”

- Dell’Oro Group

#NBASETQUOTES
Thank you!

Visit www.nbaset.org & www.delloro.com for more information