


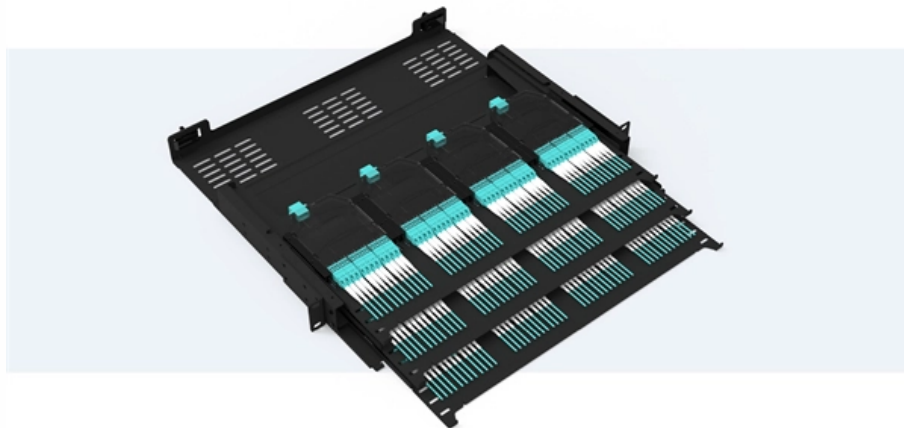


Latest news on optical switch OCS

Pre-Terminated Patch Panel

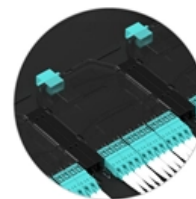
-  Standard 19" width
-  Max 144 fibers in 1U
-  Ultra-High Density Ready



Dual-rail, easy install
& maintain



Lightweight ABS
MPO cassette



Premium sheet metal
with matte coating





Overview

In this update to our OCS report we cover more vendors and technologies, investigate additional applications, and update our market forecast. This 4Q25 report is a continuation of and update to Signal AI's previous OCS reports. Hopeful vendors are jockeying for position as hyperscalers evaluate new data center switching options that could drastically reduce power needs and smash a critical bandwidth bottleneck. Optical Circuit Switches (OCS) by Application (Telecommunications, Data Communications), by Types (Robotic Switching, 3D-MEMS, Beam Steering), by North America (United States, Canada, Mexico), by South America (Brazil, Argentina, Rest of South America), by Europe (United Kingdom, Germany, France. The Open Compute Project Foundation (OCP), the nonprofit organization bringing hyperscale innovations to all, today announced the formation of a new Optical Circuit Switching (OCS) Subproject. The exponential growth of artificial intelligence (AI) and machine learning (ML) workloads is pushing the limits of traditional data center networks.



Latest news on optical switch OCS

nEye.ai Secures \$80 Million Series C to Scale Optical Circuit Switching

About nEye.ai nEye.ai is a pioneer in reconfigurable optical interconnects, reimagining data center connectivity through its unique Optical Circuit Switch (OCS) on-a-chip architecture.

Optical Component Startup Tracker

The number of venture-backed optical component startups has exploded - the Optical Component Start-Up Tracker identifies these companies



Nvidia Unveils Game-Changing Optical Network Switch

Nvidia's new optical network switch, announced at GTC, promises to revolutionize AI data centers by drastically cutting power consumption and

AI infrastructure accelerates the shift to scalable optical systems

OFC2026 clearly highlighted a market entering a new phase, where AI-driven demand is accelerating the transition toward scalable, power-efficient, and system-level optical solutions.

The Open Compute Project Announces New Optical

The Open Compute Project Foundation (OCP), the nonprofit organization bringing hyperscale innovations to all, today announced the



OFC 2026 Show Floor Programs Deliver Essential Insights on Market

Presentations highlight emerging technologies and practical implementation insights across key areas including reliability at 224G SerDes and 1.6T links, smart infrastructure monitoring

Optical Circuit Switching Market to Exceed \$2.5B in 2029

Historical spending estimates and the market forecast have each been revised upward since the previous OCS report (Jan 2025) and Cignal AI's Optical



Optical Circuit Switches (OCS) 2026-2034 Overview:

Explore the booming Optical Circuit Switches (OCS) market forecast from 2025-2033, driven by 5G, cloud computing, and AI. Discover key drivers,

Optical Circuit Switches (OCS) Market (2024-2034)

As organizations expand their digital infrastructure, managing network traffic becomes increasingly challenging. Optical circuit switches offer a solution by enabling dynamic bandwidth

Coherent rides AI data center wave as revenues soar

The company also achieved its first revenue from its new Optical Circuit Switch (OCS) platform during the quarter, marking another milestone in its



Optical Circuit Switching: New Opportunities in AI

Rather than competing, OCS and optical transceivers form a complementary ecosystem. As AI and data center demands for higher bandwidth

AI infrastructure drives PAM4 DSP market

The company is also tracking the emerging market for Coherent-Lite transceivers in data centre clusters and, potentially, within data centres to support

UTStarcom FY2025 revenue falls 17.5%, net loss widens , UTSI Stock News



UTStarcom (NASDAQ: UTSI) reported unaudited results for the six months and full year ended December 31, 2025, and outlined a strategic pivot to AI networking. Revenue fell to \$9.0M for

The Optical Circuit Switching Market

The Optical Circuit Switching Market - 4Q25 In this update to our OCS report we cover more vendors and technologies, investigate additional

Optical circuit switching is about to storm the data center market

Optical Circuit Switching (OCS). OCS isn't necessarily a new technology, but it is having a moment thanks to AI and skyrocketing demand to increase bandwidth between GPUs.



The Transformative Role of Optical Circuit Switches in Modern Data

Discover how Optical Circuit Switch (OCS) is transforming data center networks by overcoming electrical switch bottlenecks, reducing power and latency, and enabling scalable AI and ML workloads.

iPRONICS Raises EUR20M in Series A

With 1000x faster reconfiguration, lossless operation, and lower cost-per-port, iPronics' Optical Circuit Switch (OCS) technology is poised to revolutionize next-gen AI data centers,

nEye.ai raises \$80M to scale optical circuit switching for AI data



The new funding brings the total capital raised to \$152 million and sets up the company's next phase: turning its optical switching technology into a product that can be produced at scale. At

Optical Circuit Switching for AI Data Centers , Electronic Design

AI workloads strain electrical networks. Programmable metasurface solid-state optical switching offers a scalable solution.

Lumentum Hyperscaler OCS Deal Recasts AI Data Center Investment

Lumentum Holdings (NasdaqGS:LITE) has secured a multi year, multi billion dollar Optical Circuit Switching deal with a major hyperscaler. The agreement focuses on supplying OCS



Optical Circuit Switch Market Insights , Size & Outlook 2035

Technological advancements in Optical Circuit Switching, including developments in photonic integration and software-defined networking, are fostering enhanced performance and greater flexibility in

Lumentum Aims \$2B Quarter as AI Optics, 1.6T Transceivers Surge

Hurlston shared news of a new, multi-year, multibillion-dollar agreement with a major optical circuit switch (OCS) customer. He also stuck to guidance to deliver about \$400 million of OCS

2026 OFC Showcase



All-Optical Circuit Switches: 2026 the Breakthrough Year? Jim Finch, Vice President of Commercial Strategy at Saliency Labs, presents developments in all-optical switches for 2026, highlighting how

Optical Circuit Switches (OCS) Market -

Optical circuit switches (OCS) are gaining traction as data workloads demand high bandwidth and ultra-low latency. Hyperscale data centers are a primary catalyst: AI clusters pushing

When Light Replaces Copper: Lumentum (LITE) -- The Optical Heart

OCS -- redefining the switching fabric The first two paths focus on keeping existing Ethernet/InfiniBand logic while swapping copper for optics and moving optics to better locations.



OCS market to exceed US\$1 billion by 2028

There is widespread interest in Optical Circuit Switching (OCS) components for AI applications as new deployments by hyperscale operators

NEye.AI secures \$80M Series C to enhance optical circuit switching

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