IDC MarketScape

IDC MarketScape: Worldwide Enterprise Wireless LAN 2025 Vendor Assessment

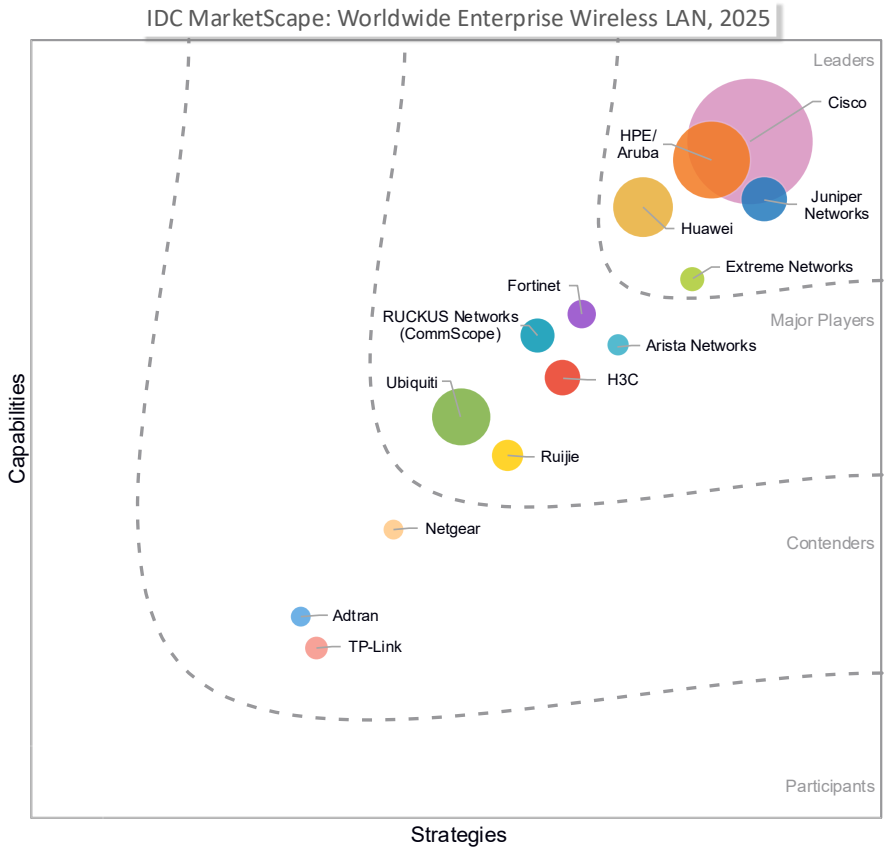
Brandon Butler Len Padilla

THIS EXCERPT FEATURES EXTREME NETWORKS AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Enterprise Wireless LAN Vendor Assessment



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See the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Enterprise Wireless LAN 2025 Vendor Assessment (Doc # US52978225).

IDC OPINION

Wireless local area networking (WLAN) is a critically important connectivity technology for enterprises across the globe. Wi-Fi and its associated wireless technologies represent a cornerstone of organizations' access-layer campus and branch connectivity strategy. WLAN powers a range of employee, customer, and guest digital experiences, while enabling secure, reliable, and efficient connectivity for organizations' mission-critical applications and services.

This 2025 IDC MarketScape for worldwide enterprise WLAN provides a quantitative and qualitative assessment of vendors in the enterprise WLAN market. The research assesses the strategies and capabilities of 14 enterprise-class WLAN vendors that have qualified for inclusion in this study, based on annualized revenue and geographic presence. This study also includes four "vendors to watch" that did not qualify as full participants but represent innovative players in the market.

The key trends in the worldwide enterprise WLAN market are as follows:

- **WLAN as a mature and competitive market:** Enterprise WLAN is an established market with more than a dozen vendors that each have mature products, strong go-to-market (GTM) strategies, and robust innovation engines. A plethora of vendors are jockeying for market and mindshare, with each targeting various segments of the market — from large enterprises to small and medium-sized businesses (SMBs) — across a range of vertical industries.
- **New spectrum and standards:** The enterprise WLAN market has seen significant innovation in recent years. Notably, Wi-Fi 6E tripled the capacity of unlicensed bandwidth available for Wi-Fi in the 6GHz spectrum for certain geographies. Meanwhile, adoption of Wi-Fi 7 is growing and will become the de facto standard in the coming years. Wi-Fi 8 is on the horizon and is expected to be commercially available in the 2027/2028 time frame. Organizations are increasingly investing in tri-band radio access points (APs), which support the use of 2.4GHz, 5GHz, and 6GHz connectivity.
- **AI making its mark:** AI is increasingly being leveraged by both vendors and end users to improve the engineering and operations of WLAN. AI-powered engineering and operations for WLAN can significantly reduce the manual

operations of WLAN, including for faster identification, remediation, and automation of network problems and optimizations. A popular use case for AI-powered WLAN is AI-enhanced radio resource management (RRM).

- **Platform-based approaches:** WLAN technology is not typically purchased in a vacuum. Organizations consider platform-based approaches to their campus and branch networking technology, inclusive of associated wired switching, routing/SD-WAN, observability/assurance tools, security services, and location-based services (LBS).
- **Architectural flexibility:** Vendors are increasingly offering a wider variety of WLAN architecture choices for enterprise customers, including both cloud and on-premises WLAN management tools to meet varying customer needs. Examples of common architectures include using dependent APs managed via a SaaS platform, on-premises-based management tools, or controller-based architecture, which is more typical in larger enterprise settings.
- **Integrated security:** Wi-Fi is more secure than ever with the advent of innovations such as the WPA3 Enterprise protocol, which provides stronger authentication and 192-bit encryption, enhancing network protection for sensitive enterprise environments. Meanwhile, zero trust architectures and systems such as network access control (NAC) — which are increasingly cloud based and SaaS delivered — improve the overall security of WLAN environments.
- **Large venues and dense Wi-Fi:** Recent innovations in Wi-Fi standards have made Wi-Fi more efficient and reliable in dense environments, including large public venues. Technologies such as MIMO, beamforming, and load balancing help distribute traffic evenly within WLAN deployments while innovations in the Wi-Fi 6 and Wi-Fi 7 standards enable higher capacity and reduced latency.
- **Market volatility:** The enterprise WLAN market has seen dramatic oscillations in terms of market size and growth rates in recent years. Despite the volatility, the fundamentals of the market remain strong. In 2024, the enterprise WLAN market declined 12.7% to $9.4 billion. The decline was due primarily to outsized growth in 2023, driven by the drawdown of backlogged product orders stemming from the supply chain disruptions of the COVID-19 era. 2025 and beyond is expected to return to historically normal supply and demand dynamics within the industry.
- **Significant M&A:** Hewlett Packard Enterprise's (HPE's) $14 billion acquisition of Juniper Networks, which closed in July 2025, will be a significant shakeup in the WLAN industry among top vendors in the market.

Note: This IDC MarketScape evaluates HPE and Juniper Networks as separate WLAN companies because the primary research phase was completed prior to the acquisition's close.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of 14 enterprise-class WLAN vendors and 4 vendors to watch. This assessment is designed to evaluate the characteristics of each firm across a set of criteria broken into two major buckets: capabilities and strategies.

IDC used a variety of primary research methods to produce this document including interviews with customers, a detailed questionnaire that all participating vendors completed, and detailed product briefings from each participating vendor. This evaluation, however, should not be considered a final judgment by firms when considering WLAN vendors. An enterprise's specific objectives and requirements will play a significant role in determining which vendors should be considered for engagement.

For inclusion in this IDC MarketScape, vendors must meet one of the following criteria:

- At least $100 million in 2024 annualized enterprise WLAN revenue
- $50 million in 2024 annualized enterprise WLAN revenue with a geographic presence across multiple worldwide regions

All quantitative vendor revenue data is derived from the IDC WLAN Tracker.

The four companies profiled in the Vendors to Watch section did not meet the criteria for full inclusion in the research but are important and innovative enterprise WLAN vendors in the market today.

ADVICE FOR TECHNOLOGY BUYERS

IDC has the following advice for customers as they consider WLAN investments:

- **Focus on business outcomes.** As enterprise buyers consider WLAN investments, it's critically important to align any technology decisions with business goals and outcomes. From a WLAN perspective, that means assessing how and where wireless networking can propel an organization's digital business use cases, applications, and user experiences (UXs). It's imperative to not make WLAN technology decisions in a vacuum but rather take the lead based on your business needs from the perspective of wireless access layer connectivity and then evaluate vendors against those criteria. Judge vendors based on not just table stakes connectivity but also on how the WLAN platforms integrate with broader network and IT systems and, more specifically, how they accelerate your organization's strategic goals.

- **Try AI-powered WLAN management capabilities.** Organizations across the globe are increasingly keen on leveraging AI-powered capabilities to improve the engineering and operations of the network, including for WLAN. While integrating AI capabilities into WLAN management platforms is not new, there is a newfound attention on how these AI-powered capabilities are being implemented by vendors and adopted by enterprises. AI-powered networking capabilities can have powerful impacts on WLAN design, deployment, and ongoing management in the areas of analysis, remediation, optimization, and security. AI-powered RRM, for example, is a key AI-powered WLAN capability that many vendors now offer. Explore how these AI-powered capabilities can enhance the engineering and operations of WLAN management and improve end user experiences.
- **Explore 6GHz Opportunities.** Wi-Fi 6E and Wi-Fi 7 now enable Wi-Fi to use the 6GHz band, which opens up to two or three times more bandwidth in certain geographies, as compared with the 2.4GHz and 5GHz bands that Wi-Fi has traditionally used. This significant advancement for the Wi-Fi industry will support a range of use cases, particularly for dense Wi-Fi environments (e.g., stadiums and convention centers) or latency-sensitive workloads. As organizations consider using 6GHz Wi-Fi, there are a variety of factors to consider, including making sure that the proper power allocations and cabling are available to ensure the maximum value of 6GHz Wi-Fi investments and understanding the client devices that can take advantage of the 6GHz Wi-Fi.
- **Embrace WLAN as a platform.** WLAN is a powerful enabling technology for a range of use cases beyond connectivity. For example, location-based services leverage WLAN technology to provide advanced capabilities such as wayfinding, asset tracking and management, foot traffic trends, and customer-engagement/hyperlocal marketing capabilities. LBS capabilities represent an opportunity to uplevel the value of WLAN technology using existing infrastructure and open a range of new business applications and use cases.
- **Make security paramount.** One of the top criteria for any enterprise network deployment is the integrated security capabilities of the platform. From an enterprise WLAN perspective, management tools can provide insights on what users and devices are on the network and can dynamically microsegment users to ensure access and usage policies. These are foundational components for customers implementing zero trust architectures within their campus and branch networks.
- **Consider your WLAN architecture, consumption, and management options.** Customers have a variety of architectural options when deploying an enterprise WLAN system, including on-premises/controller-based deployments to public or private cloud-based management or to emerging network-as-a-service (NaaS) models. Evaluate these different licensing, architectural, and management offerings, and then consider which best aligns to your organization's needs.

- **Consider professional services to maximize WLAN investments.** Enterprise WLAN deployments, architectures, implementation, and (ongoing) management can be challenging, especially large deployments in challenging areas. From surveying sites to map AP placement to identifying interference sources to planning cable and power needs, there are various factors to consider. Professional services, either directly from WLAN vendors or from partners, can help organizations ease the operational burden of deploying and managing WLAN.
- **Focus on key performance indicators (KPIs) for WLAN**. The success of a WLAN deployment can be measured via a range of KPIs, including uptime, which tracks network availability and reliability; signal strength and signal-to-noise ratio, indicating connection quality; and bandwidth, throughput, and latency, reflecting data transfer speed and responsiveness. Additional KPIs include packet loss, network jitter, user density, and coverage area — all essential for evaluating network efficiency, user experience, and infrastructure investment effectiveness.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Extreme Networks

Extreme Networks is positioned in the Leaders category of this 2025 IDC MarketScape for worldwide enterprise WLAN.

Extreme Networks offers a comprehensive WLAN portfolio designed to meet the diverse needs of enterprises across industries. With a history of strategic acquisitions, including Enterasys and Avaya, Extreme Networks has successfully integrated various technologies to deliver unified solutions. The company emphasizes flexibility, scalability, and security in its architectural design, enabling customers to optimize their network investments. Recent innovations include the introduction of Wi-Fi 6E and 7 access points and the development of Extreme Platform ONE, which integrates AI-driven capabilities for wireless monitoring, configuration, and troubleshooting.

Product Offerings

Extreme Networks provides a robust portfolio of WLAN solutions tailored to various environments, including small businesses, large enterprises, and high-density venues. Its access points include both indoor and outdoor models, featuring software-defined radios that simultaneously support IT and operational technology (OT) use cases. The portfolio includes Wi-Fi 6, 6E, and 7 devices, offering customers a balance between

performance and cost control. Specialized outdoor access points cater to dense and rugged environments, supporting large venues, Smart Cities, IoT, and location services.

Extreme's most widely deployed management platform, ExtremeCloud IQ, supports both cloud and on-premises management of devices. Features include Wi-Fi mapping, orchestrated policy enforcement, wireless intrusion detection and prevention, and secure guest access management. Extreme's Universal Access Points and simplified licensing model ensure flexibility and ease of deployment, allowing customers to switch between cloud and on-prem management without additional costs.

The recently released Extreme Platform ONE further enhances WLAN management by introducing AI-assisted capabilities for monitoring, troubleshooting, and inventory management. This platform integrates networking and security with AI, streamlining workflows and reducing operational complexity. Features such as dynamic packet capture, proactive configuration validation, and GenAI tools aim to empower IT teams to optimize network performance and resolve issues efficiently. Extreme Platform ONE has also incorporated hierarchical multitenant management, driven by their Service Provider channel strategy, enabling managed SP partners to offer NaaS services.

Extreme Networks also supports advanced location-based services through ExtremeCloud IQ, enabling asset tracking, wayfinding, and zone monitoring. Integration with third-party applications and granular location accuracy ensures scalability and resilience for large deployments. These capabilities are complemented by partnerships with industry players such as Pointr and Securitas Healthcare, enhancing use cases in healthcare, retail, and smart buildings.

Business Strategy

Extreme Networks focuses on delivering innovative and scalable networking solutions for enterprises across various verticals such as education, healthcare, government, and manufacturing. The company's strategy includes expanding AI capabilities, enhancing user experience through visualization tools, and maintaining competitive pricing. Extreme leverages a global partner ecosystem, including value-added resellers (VARs), managed SPs, and distributors, to enable market reach. Its simplified licensing model and flexible consumption options, such as Extreme Subscription Private Offer, provide financial insight and adaptability for organizations of all sizes.

Strengths

- Extreme Networks offers highly flexible deployment and management options for customers through its universal hardware, enabling customers to choose on-premises or cloud-managed wired and wireless LAN architectures using the same hardware and licenses.

- Extreme Platform One, which became generally available in mid-2025, is an advanced, AI-powered management platform with integrated visibility, analytics, and agentic automation capabilities.
- Extreme earns strong reviews from customers for its responsive support services.
- Extreme Networks has expertise in high-density environments with specialized access points, including stadiums and large public venues.

Challenges

- Extreme is working to enhance feature parity when it comes to AI-powered management capabilities between its cloud-based and on-premises management systems.
- While Extreme Fabric is a differentiating technology that most Extreme customers are happy with, some customers report a level of complexity when first adopting it.
- Given the company's market share, Extreme does not have an install base that is as large as that of other vendors such as Cisco and HPE/Aruba, which makes it challenging for the company to win customers from larger rivals.
- Despite being an early proponent of Universal ZTNA, Extreme Networks' adjacent network and security portfolio — specifically as it relates to datacenter networking, SD-WAN, and SASE — is not as mature as other vendors in the market. This could be a challenge for customers looking to work with a single vendor across campus, branch, datacenter and WAN edge use cases.

Consider Extreme Networks When

IDC recommends Extreme Networks for enterprises seeking robust and scalable networking solutions, particularly in high-density environments such as stadiums, convention centers, and large campuses. Its offerings are ideal for organizations looking for integrated wired and wireless solutions with strong management capabilities. Extreme Networks is well suited for various verticals such as education, healthcare, and hospitality, where seamless connectivity and user experience are critical.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category

focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Wireless LAN Infrastructure

Market

- **Enterprise class:** Enterprise-grade access devices are WLAN access devices designed for use in multiaccess point systems or for hotspot deployments, and they typically have a rich and upgradable feature set. There are two types of enterprise-class access point (AP) devices: independent (traditional) and dependent. Deployments are in buildings or outdoors.
- **Consumer class:** Consumer-grade access devices are products designed for SOHO and consumer (residential) deployments. This research excludes consumer-class WLAN.

Form Factor

- **Controller/switch/appliance:** Access point controllers typically manage access to the network, load balance users, enforce security policies, and provide a number of higher-level network services. This functionality is typically packaged in a layer 2 or 3 edge or core controller, a module in a chassis-based LAN switch, or an appliance. These are products designed to integrate a WLAN infrastructure with a wired Ethernet network through automating WLAN access point configuration and RF management.
- **Access points (APs):** APs include equipment that acts as an intermediary between the wired and wireless part of the network by receiving and transmitting 802.11 packets. The packets are sent over a set of predefined bands in the 2.4GHz and 5GHz radio spectrums, to and from associated wireless client devices. Access devices are connected to the wired network either directly through Ethernet cables or via wireless connections to other access devices. WLAN is also used for establishing LAN-to-LAN bridges that usually involve providing connectivity between buildings without the use of cabling.

Standards

All equipment covered in this document supports the IEEE 802.11 set of standards for WLAN networks. IDC separates 802.11 as follows:

- 802.11a/b/g
- 802.11n
- 802.11ac
- 802.11ax (Wi-Fi 6)
- 802.11ax (Wi-Fi 6E)
- 802.11be (Wi-Fi 7)

Product

- **Controller/switch/appliance:** For the definition, refer back to the Form Factor section.
- **Independent (in-building, standalone) access points:** Independent, or traditional, access points include network processing hardware, are set up and configured with standalone configuration tools, and have a full feature set that allows them to operate as independent endpoints on the wired network.
- **Dependent (in-building, managed) access points:** Dependent access points ("thin," "light," "managed," or "in-building managed" access points) rely on a centralized controller or an alternate management or control platform for operation and management. They are lighter in terms of onboard network

processing hardware; although, that difference has eroded in recent years as controller-based architectures are also being deployed by using alternate centralized or decentralized solutions for provisioning network parameters and policies.

Excluded

- **Hotspots**
- **Mesh networks:** Mesh access points, or nodes, do not require an immediate connection to the wired network. They use routing protocols to establish communications with other nearby access points and, in this way, can blanket a large area with coverage with minimum investment in expensive cabling for wired-side infrastructure.

LEARN MORE

Related Research

- *Worldwide SD-WAN Infrastructure Market Shares, 2024: Automated and Secure Wide Area Networking for the Cloud and AI Era* (IDC #US53534625, June 2025)
- *Worldwide Campus and Branch Ethernet Switch Market Shares, 2024: As Market Resets, Focus Shifts to AI and Platforms* (IDC #US52191625, June 2025)
- *Worldwide Enterprise-Class WLAN Market Shares, 2024: Amid a Market Reset, Vendors and Enterprises Look Toward AI, Security, and Wi-Fi 7* (IDC #US52191525, May 2025)
- *Worldwide Enterprise WLAN Forecast, 2025-2029* (IDC #US52191725, May 2025)
- *The Rise of Network Platforms: Key Attributes, Benefits, and Challenges* (IDC #US53401925, May 2025)
- *Quantifying the Use of AI-Powered Campus and Branch Network Management* (IDC #US52769624, December 2024)
- *Wi-Fi 6E and the Future of Connectedness: A New Generation of Wi-Fi in the 6GHz Band* (IDC #US50789523, June 2023)

Synopsis

This IDC study provides a quantitative and qualitative assessment of vendors in the worldwide enterprise WLAN market. The research assesses the strategies and capabilities of 14 enterprise-class WLAN vendors that have qualified for inclusion in this study, based on annualized revenue and geographic presence. This study also includes 4 "vendors to watch" that did not qualify as full participants but represent innovative players in the market.

"WLAN is a cornerstone of organizations' access-layer campus and branch connectivity strategy, powering a range of employee, customer, and guest digital experiences while enabling secure, reliable, and efficient connectivity for organizations' mission-critical applications and services. Meanwhile, new standards and unlicensed spectrum, AI-powered networking, and platform-based approaches make the WLAN market dynamic, competitive, and innovative. This document is meant to provide enterprises with a qualitative assessment of vendors in the WLAN market to aid their journeys in finding a WLAN partner for accelerating their digital and network transformation goals," says Brandon Butler, senior research manager, IDC's Enterprise Networks, and Len Padilla, senior research director, IDC's European Networking and Life-Cycle Services.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com