# Magic Quadrant for Enterprise Wired and Wireless LAN Infrastructure

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The need to reduce manual work in enterprise LANs is driving demand for AI networking and network as a service. As demand for automated and adaptive security grows, infrastructure and operations leaders should use this research to make investment decisions across campus, branch and remote locations.

## Strategic Planning Assumptions

By 2028, 35% of enterprises will use artificial intelligence to improve network operations and resilience, which is a major increase from fewer than 10% in 2025.

By 2028, on-premises campus network as a service (NaaS) will be adopted by 15% of all enterprises, which is a significant increase from fewer than 2% in 2025.

By 2029, 20% of enterprises will replace network access control (NAC) and/or embedded switching security features with zero-trust network access (ZTNA) on corporate-owned campus LANs, compared with fewer than 2% in early 2025.

## Market Definition/Description

Gartner defines the enterprise wired and wireless LAN infrastructure market as the hardware and software that enables local connectivity for users and devices. The infrastructure components include enterprise-class wired switches and wireless access points, and the management software that secures, manages, tests, optimizes and automates the network.

Organizations across vertical markets rely on enterprise wired and wireless network infrastructures to connect and transmit data for both fixed and mobile devices, enabling end users to access applications that are located either on-site, in remote private or public destinations. In addition to end-user connectivity, these infrastructures offer capabilities for diverse market needs, including:

- Discovery, identification, security, management and segmentation of Internet of Things (IoT) and operational technology (OT) devices
- Design and planning for network infrastructure requirements
- Implement zero-touch provisioning for deployment and configuration of the network infrastructure devices
- Offer support, testing and maintenance for network infrastructure components
- Establish a resilient infrastructure to withstand disruptions and provide continuous operations
- Implement robust security measures to safeguard the network infrastructure
- Scalability and flexibility for efficient management and control plane communication processes
- Provides a no-touch or low-touch environment for operations on Day 2

## Mandatory Features

The mandatory features of this market include:

- Ethernet network switches suitable for deployment at the network access, distribution and core network layers
- IEEE 802.11 Wi-Fi-certified access points that support a combination of 2.4GHz, 5GHz and 6GHz radios
- Network management application provided in the vendor's cloud or available for local deployment on a physical or virtual appliance
- Network management application that securely connects to the infrastructure for administration

- Telemetry data generated by the wired and wireless infrastructure for optimization, troubleshooting and issue resolution
- Campus network fabric for user and device isolation, microsegmentation and application control
- Security application for user and device authentication and authorization
- Security application for creating and enforcing security policies

## Common Features

The common features for this market include:

Hardware capabilities:

- Wired switches equipped with Power over Ethernet (PoE) with standard PoE, PoE+, PoE++
- Wired switches equipped with multigigabit access ports up to 10 Gbps, and uplink ports up to 100 Gbps
- Wireless access points for indoor and outdoor environments, and optional external antennas
- Wireless access points equipped with single or dual Ethernet ports capable of multigigabit speeds
- Wireless access points that can support IoT devices that are physically connected (USB) or wirelessly connected (i.e., BLE)
- Wired and wireless hardware capable of MACSec support
- Wired and wireless hardware capable of campus fabric protocols (i.e., EVPN/VXLAN)

Management capabilities:

- Configuration of network infrastructure with automated zero-touch provisioning (ZTP)
- Network infrastructure configuration management: backup, restore and detection of configuration drift
- Performance monitoring and analytics for end users and applications they use on their devices

- Collection of telemetry data for AI- and ML-driven network assurance tools that troubleshoot and optimize the network
- Network AI assistants that provide natural language interfaces for configuration and troubleshooting tasks
- Application and behavior monitoring analytics, such as user and entity behavior analytics (UEBA), with the network security policy to facilitate appropriate action taking
- Collection of locationing telemetry data from the infrastructure to provide indoor location services
- Capability to manage legacy third-party switches and access points through exported APIs, Simple Network Management Protocol (SNMP) and other methods
- Integration with IT service management (ITSM) applications, including ticketing systems

Network access control capabilities:

- Provides a mechanism for onboarding/offloading from public or private mobile networks (i.e., Passpoint, OpenRoaming)
- Provides a guest access portal that directs guests outside of the firewall for internet connectivity
- Provides onboarding and adaptive controls to apply zero-trust principles to all connected users and devices
- Provides the discovery, identification, security and management of nonuser devices (IoT/operational technology [OT])
- Provides a campus network fabric that establishes dedicated communication channels from the end-user connection to the intended destination. This fabric should seamlessly extend across third-party equipment (e.g., switches and access points) for microsegmentation capabilities.

Licensing models:

- Subscription- or perpetual-based licensing options for each component of the wired and wireless network infrastructure

- Consumption-based utility models that include the wired and wireless network infrastructure components, also known as network as a service (NaaS)

It is important to note that this research does not encompass wired and wireless networking infrastructure devices primarily utilized to support adjacent markets, such as point-to-point wireless WAN offerings, industrial/ruggedized LAN equipment or Wi-Fi hot spot services.

# Magic Quadrant

**Figure 1: Magic Quadrant for Enterprise Wired and Wireless LAN Infrastructure**

## Vendor Strengths and Cautions

### ALE

Alcatel-Lucent Enterprise (ALE) is a Niche Player in this Magic Quadrant. Its OmniSwitch switches, OmniAccess Stellar wireless access points and OmniVista management products broadly address the enterprise network market. ALE's portfolio includes on-premises and cloud-based management options, with network fabric segmentation and universal network policy for IT and IoT provisioning. The company prioritizes the midsize enterprise (MSE) business market segment, and its clients are primarily in the government, healthcare and transportation verticals. Gartner expects ALE to continue to invest in its AI networking capabilities and on the integration of private mobile networks through its partnership with Celona.

*Strengths*

- **Product:** ALE provides a breadth of network management capabilities, including zero-touch provisioning (ZTP) capabilities, automation, and detailed analysis of network traffic and of client performance metrics.
- **Market responsiveness:** ALE has strong campus fabric capabilities with third-party support, which have now been extended to the edge, allowing unified policy enforcement for users and Internet of Things (IoT) endpoints, managing network access based on identity, security posture, device type and application usage.
- **Market understanding:** The vendor's roadmap, surrounding its fabric and improved infrastructure management capabilities, is aligned with enterprise requirements for automated policy enforcement and IT/OT convergence.

*Cautions*

- **Marketing strategy:** ALE's messaging is less effective with Gartner clients than other vendors in this research, focusing more on technical capabilities such as campus fabric and segmentation technology.
- **Geographic strategy:** ALE has one of the smallest market footprints of all vendors in this research. The company has pockets of strength in Europe, but there is little market penetration outside of this region.
- **Product strategy:** ALE has a number of product gaps, including AI networking capabilities that are broadly limited to radio resource management (RRM) wireless LAN (WLAN) use

cases and minimal user entity behavior analytics (UEBA) capabilities.

### Allied Telesis

Allied Telesis is a Niche Player in this Magic Quadrant. The company has a broad switching portfolio and a WLAN offering. The portfolio is governed by Vista Manager EX, the Autonomous Management Framework Plus (AMF Plus), the AMF-Security Controller and the Autonomous Wave Control (AWC) wireless controller. Allied Telesis focuses on customers in the healthcare, education and government sectors, and its operations are geographically diverse. Gartner expects the implementation of additional telemetry data collection in its switch and access point portfolios to broaden AI networking capabilities.

*Strengths*

- **Market understanding:** Allied Telesis is investing in automated networking within AMF Plus to simplify administration for wired and wireless infrastructure.
- **Vertical strategy:** Allied Telesis enhanced its portfolio's relevance in expanding markets, such as OT networking in manufacturing and industrial environments, by integrating MACsec for heightened security.
- **Product:** Allied Telesis simplifies management and configuration, delivering consistent operations through its single OS, AlliedWare Plus, across all products.

*Cautions*

- **Market responsiveness:** Allied Telesis has limited AI networking capabilities as it works to implement additional telemetry data collection for anomaly detection and root cause analysis.
- **Geographic strategy:** Allied Telesis has limited wired and wireless LAN market visibility among customers and prospects outside Japan, based on end-user Gartner interactions, gartner.com searches and social media conversations.
- **Product strategy:** Allied Telesis' planned product innovations are unlikely to disrupt or shape the broad enterprise market, because it is more aligned with midmarket and small and midsize enterprise (SME) customers' needs.

### Arista Networks

Arista Networks is a Visionary in this Magic Quadrant. It targets the enterprise networking market with its Cognitive Campus switches and Wi-Fi access points, and the CloudVision Platform (CVP) for management. Predominantly serving customers in North America, Arista's customers span the financial, healthcare and higher-education sectors. Gartner anticipates continued investment by Arista in enhancing CloudVision's integrated security, AI/machine learning (ML) and digital experience monitoring (DEM) capabilities. This strategic expansion aims to provide proactive network performance monitoring, application visibility, and policy enforcement across both campus and data center environments.

*Strengths*

- **Product:** Arista's CVP manages campus and data center (DC) environments, and provides digital twin capabilities for network testing and validation.
- **Innovation:** Arista's roadmap aligns with broad enterprise market demands for AI networking capabilities, natural-language processing (NLP), automated ticketing and incident classification.
- **Product strategy**: Arista continues to evolve secure campus networking and zero-trust security offerings, featuring NAC and advanced threat detection and response, via Arista NDR (network detection and response) solution.

*Cautions*

- **Sales execution and pricing:** Arista's campus switching portfolio targets large enterprises and comes with a price premium.
- **Marketing execution:** Arista's limited marketing and DC-centric sales force limits market visibility, which creates buyer hesitation in campus networking.
- **Sales strategy:** In 2024, North America accounted for more than 60% of Arista's wired and wireless LAN revenue. Organizations in other regions should verify product and service availability.

**Cisco**

Cisco is a Challenger in this Magic Quadrant. Its Catalyst and Meraki portfolios deliver a broad portfolio of wired and wireless access products, network applications, and services. Catalyst includes Catalyst Center for on-premises management, while Meraki provides cloud-based management. Cisco Catalyst and Meraki both offer integration with Cisco

Identity Services Engine (ISE), Cisco Spaces and ThousandEyes. Cisco's strategy is focused on delivering a unified experience with common hardware and licensing, marking a significant shift from its historical LAN portfolio, where Catalyst and Meraki had separate management, deployment and commercial dependencies. Gartner expects Cisco to continue investing in portfolio integration and AI networking capabilities.

*Strengths*

- **Overall viability:** Cisco's wired and wireless LAN offerings have a broad geographic reach that allow Cisco to provide products and service in all regions.
- **Product:** The integration of ThousandEyes into Cisco's Catalyst Center and Meraki Cloud provides advanced capabilities for granular hop-by-hop observability and troubleshooting.
- **Business model:** Cisco's Wi-Fi 7 access points introduce a unified licensing model, simplifying the buying experience. This commercial model is planned to be applied to all future released hardware offerings.

*Cautions*

- **Product strategy:** Cisco's product strategy isn't well-aligned with key enterprise needs and overall value, as it is more reactive in its focus on integration across the portfolio.
- **Innovation:** Cisco's most impactful planned innovations are less likely to disrupt the enterprise market than those of the leading vendors in this research.
- **Market responsiveness:** Cisco is still in the process of unifying its entire Catalyst and Meraki portfolio into a coherent offering, creating challenges for customers as their needs evolve.

### CommScope (RUCKUS)

RUCKUS Networks, owned by CommScope, is a Niche Player in this Magic Quadrant. It addresses the market with RUCKUS brand ICX wired switches, R series wireless access points and the RUCKUS One network management platform. The Cloudpath Enrollment System provides NAC and guest services. Operating globally, RUCKUS focuses on the hospitality, multiple-dwelling-unit and education sectors. Gartner expects RUCKUS to continue investing in vertical-focused customer requirements, enhancing AI networking

capabilities, and expanding its multiservice catalog with joint RUCKUS/partner services, such as software-defined WAN (SD-WAN) and firewalls.

*Strengths*

- **Vertical strategy:** RUCKUS has strong investment alignment with enterprise needs for guest access services in environments with high visitor traffic, such as hospitality, multidwelling units (MDUs) and higher-education dormitories.
- **Product:** The RUCKUS One platform offers wired and wireless segmentation, along with IoT onboarding and automation capabilities, all deployable at the edge.
- **Market understanding:** The RUCKUS One platform targets wireless LAN market needs by offering network assurance services that support low-latency networking.

*Cautions*

- **Overall viability:** The long-term viability of RUCKUS is uncertain, with CommScope highlighting financial risks related to its debt in its 2024 financial report..
- **Product strategy:** RUCKUS' planned roadmap lacks alignment with broad market needs, missing network security features such as user analytics, UEBA and universal zero-trust network access (UZTNA), and narrowly focusing its AI networking capabilities on WLAN.
- **Marketing execution:** RUCKUS has limited visibility among Gartner enterprise clients, potentially hindering its market growth.

**Extreme Networks**

Extreme Networks is a Visionary in this Magic Quadrant. It offers an integrated enterprise portfolio combining wired and wireless into a seamless solution. Extreme Fabric is an automated network fabric that is managed via a unified platform, available in the cloud and on-premises. Extreme's operations are geographically diversified, with its largest markets in North America and Europe, the Middle East and Africa (EMEA). Extreme Networks serves the broad market, including such sectors as government, education, healthcare, manufacturing and retail. Its universal hardware, universal licensing and third-party network management enhance flexibility and integration, while focusing on improving customer experience (CX). Gartner expects Extreme to invest in the new Extreme Platform ONE strategy, enhancing AI networking capabilities through a contextualized user interface (UI).

*Strengths*

- **Product:** Extreme Networks delivers a unified wired and wireless infrastructure, providing a seamless and policy-driven automated campus network fabric.
- **Business model:** Extreme Networks provides universal hardware and licensing, allowing licenses to be moved across different devices, enhancing customer investment protection.
- **Vertical strategy:** Extreme Networks serves a wide range of sectors, ensuring tailored solutions for specific industry needs.

*Cautions*

- **Market responsiveness:** Extreme Networks lags in delivering coherent AI networking capabilities, such as AI assistants and network digital twins.
- **Marketing execution:** Extreme Networks' marketing programs have not effectively reached Gartner clients, which affects market awareness.
- **Product strategy:** Extreme Networks' Platform ONE offering, which is launching in mid-2025, requires migration for the current ExtremeCloud IQ installed base, which may necessitate testing and transition planning.

### Fortinet

Fortinet is a Leader in this Magic Quadrant. The Fortinet Security Fabric, unified by FortiOS, enables seamless integration between its wired and wireless products and security offerings. Using the proprietary FortiLink protocol, FortiAPs and FortiSwitches extend the capabilities of the FortiGate security appliance. Fortinet operates globally, serving clients from midsize to large enterprises across various sectors. Gartner anticipates continued investment from Fortinet in enhancing its AI networking capabilities, including improved third-party management and network performance monitoring. Additionally, Fortinet is expected to launch a modular chassis switch.

*Strengths*

- **Market responsiveness:** Fortinet's Secure LAN offering strongly resonates with clients prioritizing cybersecurity. Its focus on advanced functionalities, such as UEBA, secure access service edge (SASE) and DEM, while maintaining UZTNA, adds significant value.
- **Market understanding:** Fortinet expands enterprise networking from IT into OT environments such as manufacturing and utilities, bridging network and security

operations through its infrastructure management offering.

- **Product:** Fortinet offers consistent capabilities and cost-effective licensing, across both on-premises and cloud deployment options.

*Cautions*

- **Sales strategy:** Fortinet often starts commercial relationships with security buyers, which makes it challenging to engage network operations teams, limiting opportunities in large enterprises.
- **Innovation:** Fortinet lags in the AI networking capability to integrate with IT service management (ITSM) applications, which is becoming essential for enterprises in troubleshooting and change management.
- **Product strategy:** Fortinet lacks a chassis switch, which is essential for high-density access and high-speed core/distribution use cases.

### H3C

H3C is a Niche Player in this Magic Quadrant, offering a broad range of wired and wireless access products that support on-premises and cloud management through its Application-Driven Campus and Cloudnet solutions, respectively. It has a robust hardware portfolio, including Wi-Fi 7 access points and high-bandwidth switches. H3C is one of the few vendors capable of delivering a fully optical network, including optical connectivity to the desktop, through its All-Optical 5.0 solutions. H3C primarily operates in the Asia/Pacific (APAC) region. Gartner expects H3C to continue investing in AI assistant functionality and enhancing its high-bandwidth optical solutions for campus environments.

*Strengths*

- **Overall viability:** H3C's broad portfolio addresses enterprise infrastructure needs, including optical networking for campuses with fiber to the desk (FTTD) and fiber to the access point solutions, ideal for high-security environments.
- **Customer experience:** H3C's customer service is strong, with its focus on customer-centric consulting, implementation and end-to-end support.
- **Product:** H3C provides strong automated deployment capabilities across its campus stack and plans to further enhance these capabilities by integrating AI to boost automation.

*Cautions*

- **Market understanding:** H3C has limited third-party management and advanced AI networking capabilities, such as digital twins, as compared to other vendors in this research.
- **Sales execution/pricing:** H3C's sales and marketing strategy does not effectively expand its influence in the enterprise market outside the APAC region.
- **Marketing execution:** H3C has low visibility and awareness among Gartner clients, leading to uncertainty among potential buyers.

**HPE (Aruba)**

Hewlett Packard Enterprise (HPE) Aruba is a Leader in this Magic Quadrant. HPE Aruba Networking offers a comprehensive range of unified wired and wireless components that address all of the use cases covered in this research. These components are managed by HPE Aruba Networking Central, available on-premises and via the cloud/virtual private cloud. The offering features advanced security, including UEBA, zero-trust networking and AI networking capabilities. Its operations are geographically diversified, serving clients across all markets, from SMEs to large enterprises. Gartner expects HPE Aruba Networking to continue investing in its cloud offerings and expanding in the market with private mobile networking and SASE solutions.

*HPE announced its intention to acquire Juniper Networks on 9 January 2024. At the time of this evaluation and publication, however, HPE and Juniper Networks operated as separate legal entities. Gartner will provide further insight as more details become available.*

*Strengths*

- **Market responsiveness:** HPE Aruba Networking Central, integrated with HPE's OpsRamp, eases migration and supports multivendor environments by natively monitoring legacy and third-party network and security components.
- **Product:** HPE Aruba Networking has delivered AI networking capabilities, including telemetry collection and a time travel feature that slices historical data for up to seven days, offering granular insights.
- **Market understanding:** HPE Aruba's security-first AI network infrastructure is designed to meet the broad demands of the enterprise market. It offers an automated and secure

wired and wireless fabric, facilitating the deployment of a zero-trust architecture.

*Cautions*

- **Vertical strategy:** The disparity between cloud and on-premises security and AI networking capabilities creates challenges in markets that require on-premises network applications, such as healthcare or banking.
- **Sales strategy:** HPE Aruba Networking offers multiple NaaS options for end customers and its channel; this can be confusing for prospective buyers when considering licensing options and service packs.
- **Product strategy:** Customers of HPE Aruba Networking have voiced concerns about the upcoming Juniper acquisition, citing uncertainty regarding future portfolio investments.

**Huawei**

Huawei is a Leader in the Magic Quadrant. Its CloudCampus solution includes CloudEngine S-series switches, AirEngine wireless access points and iMaster NCE-Campus application. Huawei serves large enterprises across multiple verticals, with notable growth in Africa, Asia, Europe and Latin America. However, geopolitical challenges have resulted in a lack of presence in countries such as the U.S., Canada, Australia, U.K. and India, where Huawei has ceased activities voluntarily. Gartner anticipates that Huawei will continue to invest in enhancing its Wi-Fi portfolio, AI networking and automated intent-based control capabilities to improve user performance and operational efficiencies.

*Strengths*

- **Product:** Huawei's iMaster NCE features advanced AI networking capabilities, including digital twins and intent-based features, such as VIP FastPass, which automates network provisioning and optimizes user experience (UX).
- **Market responsiveness:** Huawei's unified wired and wireless solution provides campus fabric and zero-trust LAN features, including UEBA and microsegmentation policy controls, which are in demand by many enterprises.
- **Innovation**: Huawei's planned product innovations are well-aligned with the emerging needs of enterprise customers, integrating Wi-Fi 8 concepts into current Wi-Fi 7 access points, developing real-time application journey playback capabilities, and ensuring parity between on-premises and cloud solutions.

*Cautions*

- **Geographic strategy:** Huawei's geopolitical challenges limit its presence in certain regions, which is restricting market growth.
- **Sales strategy:** Huawei provides pricing only on a pay-for-use and subscription basis, without intent to offer consumption models focused on operating expenditures (opex).
- **Marketing strategy:** Huawei's marketing programs have limited efficacy with Gartner clients, compared with other vendors, focusing more on technical capabilities than on client business values and outcomes.

### Join Digital

Join Digital enters this Magic Quadrant as a Niche Player. Join offers a NaaS model that includes LAN networking hardware, software, internet connectivity and security via its cloud platform. Its Workplace Analytics offering addresses complex enterprise networking needs. Join Digital serves enterprises in commercial real-estate, high tech and financial services, with a focus on simplifying integrations with mission-critical OT/IOT systems, such as automated building control systems. Gartner anticipates that Join Digital will continue to invest in AI assistants and UX scoring to further enhance its service offerings and meet evolving enterprise demands.

*Strengths*

- **Customer experience:** The vendor's offering is designed for hands-off operation, targeting suitable organizations with limited resources. It is backed by an SLA.
- **Product:** The NaaS offering includes a plug-and-play approach that simplifies Day 1 network deployment, including integrations with digital conference rooms, managed printers and voice over IP (VoIP) phones.
- **Innovation:** Join Digital's Workplace Analytics platform provides real-time data on occupancy, indoor environmental quality and network performance.

*Cautions*

- **Overall viability:** Join's exclusive reliance on the NaaS model may not align with the needs of all enterprises, because it is the only purchasing option available, potentially limiting adaptability for organizations seeking more traditional procurement methods.

- **Marketing execution:** Join Digital has a limited marketing presence, which could affect its ability to compete with larger, more established companies in terms of market visibility.
- **Product strategy:** Opting for wired-only or wireless-only deployments with Join Digital may restrict the service, which is designed to be most effective with unified wired and wireless integration.

### Juniper Networks

Juniper Networks is a Leader in this Magic Quadrant. Its wired and wireless LAN offering includes Juniper Access Points and EX Series Switches, addressing most use cases across midsize and large enterprise markets. Juniper Mist cloud management and NAC capabilities deliver optimized user and operator experiences. Juniper's client base is globally diverse, with a particular focus on the general enterprise market, as well as the retail, education, government, financial and healthcare sectors. The company continues to invest in integrated AI and ML operations, alongside cloud-based security capabilities. Gartner expects Juniper to further enhance its offerings by investing in AI networking technologies, such as large experience models (LEM) with continuous learning interfaces and agentic NetOps, during the next year.

*HPE announced its intention to acquire Juniper Networks on 9 January 2024. At the time of this evaluation and publication, however, HPE and Juniper Networks operated as separate legal entities. Gartner will provide further insight as more details become available.*

*Strengths*

- **Market responsiveness:** Juniper Network's Mist AI, featuring Marvis Minis agentic AI with an embedded digital experience twin, provides enterprises with constant insights into the condition of their network, enabling hands-off operations.
- **Innovation:** The vendor's planned innovations aim to meet evolving enterprise requirements by simplifying networks with real-time visibility and automation.
- **Customer experience:** Juniper Networks' customer support is highly rated, due to both support and data science teams collaborating closely with engineering and customers to enhance outcomes.

*Cautions*

- **Overall viability:** Some customers of Juniper Networks have voiced concerns about the upcoming acquisition by HPE, citing the uncertainty it introduces.
- **Vertical strategy:** Juniper Networks' delivers cloud-based security, such as NAC, that may limit applicability in markets that require on-premises deployment options.
- **Sales execution/pricing:** Juniper Networks does not currently offer NaaS consumption models that support a pay-as-you-go approach.

**Meter**

Meter enters this Magic Quadrant as a Visionary. Meter offers a NaaS model that includes LAN networking hardware, software, internet connectivity and security via its cloud platform. Meter's network management platform leverages digital twin technology that eases network operations. Its guest services include a cellular service, which is based on Citizens Broadband Radio Service (CBRS), billed and managed in-house. Meter predominantly serves enterprises with distributed locations, including retail; it targets logistics, manufacturing and education. Gartner expects Meter to continue expanding its AI networking functionality.

*Strengths*

- **Market understanding:** The vendor's roadmap aligns with enterprise needs to eliminate operational expenditures from network investments by delivering a fully automated and self-healing network, which is especially beneficial for organizations with limited IT resources.
- **Product:** Meter's NaaS offering includes a generative UI, with digital twin capabilities for Day 1 and Day 2 network activities, along with native configuration management database (CMDB) support.
- **Product strategy:** Meter's NaaS offering includes network design and redundancy, using devices as sensors to track the end-user experience and automatically alert when issues arise, all aimed at eliminating network downtime.

*Cautions*

- **Overall viability:** Meter's exclusive reliance on the NaaS model may not meet the needs of all enterprises, potentially limiting adaptability for organizations seeking traditional procurement and operational methods.

- **Market responsiveness:** Meter lags in advanced network security functionality, as well as emerging UZTNA capabilities.
- **Business model:** Deploying Meter's NaaS with third-party network devices is not recommended, as the service is not designed to support third-party access points or switches.

### Nile

Nile enters this Magic Quadrant as a Visionary. The Nile offering is packaged as a NaaS model that includes LAN switches, access points and cloud-based network applications. Nile's NaaS delivers a secure campus fabric on Day 1, featuring granular network segmentation for every device and advanced capabilities to segment guests from the LAN to Nile's cloud. Nile's operations are geographically diverse, serving enterprises across various market sectors that require NaaS solutions. Gartner anticipates Nile will continue investing in UZTNA, including cloud RADIUS, and expanding its offering to include customer premises equipment (CPE) for local site internet access.

*Strengths*

- **Product strategy:** Nile's NaaS offering includes an SLA for three performance metrics, providing clients with credit if any of these metrics are not met.
- **Market understanding:** As a NaaS vendor, Nile handles equipment planning and installation through step-by-step survey and activation wizards, ensuring a seamless process. Its AI operations center optimizes operations and eliminates Day 0 and Day 1 issues by managing the entire process end-to-end.
- **Customer experience:** Nile uses in-band and out-of-band sensors to continuously monitor and ensure optimal network performance.

*Cautions*

- **Overall viability:** Nile's NaaS solution mandates the use of its proprietary equipment, offering no migration path to integrate legacy hardware or transition away from its system.
- **Vertical strategy:** Nile's cloud-only architecture restricts its applicability in markets that may require on-premises network applications, such as healthcare or banking.

- **Market responsiveness:** Nile's service does not provide capability for customers to self-test configuration and validate changes.

**TP-Link**

TP-Link is a Niche Player in this Magic Quadrant. It focuses on SMEs with its Omada and Omada Pro product lines, which include switches, wireless access points and management solutions. TP-Link's wired and wireless LAN capabilities are competitively positioned on a price-for-performance basis, compared with other vendor solutions in this research, with the Omada management system offered in cloud and on-premises options. The company's operations are geographically diversified, with most revenue coming from the EMEA region, followed by the APAC region and North America. Gartner expects TP-Link to continue investing in SME customer needs by enhancing the ease of configuration and operations through the Omada management offering.

*TP-Link declined requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.*

*Strengths*

- **Overall viability:** TP-Link offers a comprehensive range of wired and wireless products, addressing price sensitive buyers on a global basis.
- **Sales execution/pricing:** TP-Link is cost-effective, with Omada Pro offering free licenses when deployed on-premises, which may align better with the budgetary needs of SMEs.
- **Product:** Omada Pro is available on-premises and in the cloud, offering parity in features and functionality across each deployment model.

*Cautions*

- **Market understanding:** The vendor's focus on SME networking is not well-aligned with the emerging needs of enterprises, particularly in addressing advanced operation and security requirements.
- **Innovation:** TP-Link lags behind competitors in supporting AI networking capabilities, which limits its ability to meet the hands-off operations requirements increasingly demanded by enterprises.
- **Product strategy:** TP-Link continues to provide basic network security with limited network policy enforcement, IoT containment and a lack of support for advanced

deployment requirements, such as campus fabrics and zero-trust LAN.

## Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

### Added

The following vendors were added to this iteration of the Magic Quadrant research:

- H3C
- Join Digital
- Meter
- Nile

### Dropped

The following vendors no longer meet inclusion criteria and dropped from this iteration of the Magic Quadrant research:

- Cambium Networks did not satisfy Gartner’s client relevancy or growth threshold criteria.

# Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, providers must:

- Demonstrate relevance to Gartner clients in the enterprise wired and wireless networking market by offering an Ethernet switching and wireless LAN (Wi-Fi) hardware and associated campus network application portfolio that addresses at least two of the three network layers (core, access, and/or distribution) requirements as outlined in the Market Definition section.

- Produce or OEM networking products, including access points, switches (mechanical and/or virtual stackable wired networking) and, optionally, appliances for on-premises applications for general availability as of 31 December 2024. All components must be publicly available for purchase, exist in inventory, be available for shipping and be included on the vendor's publicly published price list. Products shipping after this date will only have an influence on the Completeness of Vision axis.
- Vendors must meet the following revenue and growth threshold requirements:
  - Have customers in at least three of the following regions: APAC (including Japan), North America, Latin America and EMEA, with no more than 70% of annual revenue generated in any single region.
  - At least $200 million in annual revenue and have at least 200 customers that use its enterprise wired and wireless LAN solution in the 12 months from 1 January 2024 to 31 December 2024, where "customer" is defined (per Gartner Methodologies) as a net-new installed logo that has paid for the equipment and/or is additionally paying (for subscription services), depending on the purchasing model.

Or

- At least $10 million in the 12 months from 1 January 2024 to 31 December 2024, and 50% growth compared with the previous 12 months.
- Have a cloud- and on-premises-capable platform that provides network discovery, identification, configuration, security, management, monitoring and integrated network automation tools.
- Offer campus network applications which offer, at a minimum, device and user segmentation with specific remediation for guest users/devices and IoT devices.

# Evaluation Criteria

## Ability to Execute

**Product or Service:** We evaluate vendors by looking at their overall wired and wireless LAN offering, including both hardware and software aspects. We consider the breadth and depth of wired and wireless LAN functionality, including enterprise use cases they support. Specific functionality assessments include:

- Wired LAN hardware portfolio
- Wireless LAN hardware portfolio
- LAN infrastructure management
- Campus fabric segmentation
- Zero-trust LAN
- Guest services
- AI networking

**Overall Viability:** We assess the vendor's overall financial health and the likelihood that the organization will continue to invest across multiple areas (marketing, sales, product, support) and grow its enterprise wired and wireless LAN offering.

**Sales Execution and Pricing:** We assess the vendor's pricing and direct/indirect sales structure and effectiveness. The majority of this assessment is based on pricing/licensing offered to enterprise customers. We assess the pricing/licensing model, simplicity/complexity of pricing, and ultimate value of the offering. For sales execution, we look at setup, investment and overall effectiveness of go-to-market activities of both the vendor's internal sales resources and its channels, and across geographies.

**Marketing Execution:** We assess the efficacy of the vendor's marketing program. We evaluate the clarity, consistency and amplitude of messages, including (but not limited to) its website, social media channels and the like. We focus on whether the vendor's main messages resonate with enterprises, including key points of differentiation. We assess whether the vendor is making appropriate investments in marketing and if they're delivering results. We look at how prominently prospects consider the vendor.

**Market Responsiveness and Track Record:** We assess the vendor's track record in delivering the right capabilities at the right time to address enterprise customer needs, compared with competitors. This criterion considers the vendor's history of responsiveness in terms of changing market demands and addressing limitations. This evaluation focuses primarily on product capabilities, including hardware and software, such as new features and interface speeds. However, it is not limited exclusively to products, as it also includes broader emerging market trends.

**Customer Experience:** We assess all aspects of the customer experience, including pre- and postsales activities. This includes customer feedback regarding full life cycle experiences with the vendor's wired and wireless LAN products, including presales, implementation, hardware/software quality and technical support. We look at how the vendor manages CX, as well as the broader corporate aspects of CX, including employee engagement.

**Operations:** We typically assess a vendor's ability to meet goals and commitments through factors such as internal processes, organizational structure and staff training. For this Magic Quadrant research, however, operational considerations were not evaluated, as they were determined to be less directly relevant to the primary decision points for clients in this market.

**Ability to Execute Evaluation Criteria**

| *Evaluation Criteria* | *Weighting* |
|---|---|
| Product or Service | High |
| Overall Viability | Low |
| Sales Execution/Pricing | Medium |
| Market Responsiveness/Record | High |
| Marketing Execution | High |
| Customer Experience | Medium |
| Operations | NotRated |
| | |

Source: Gartner (June 2025)

## Completeness of Vision

**Marketing Strategy:** We evaluate the ability of the vendor to influence the market into the future, through its messaging and marketing campaigns. This includes the vendor's plans to invest in its marketing program and ability to deliver concise, relevant and consistent forward-looking marketing messages that are aligned with buyer personas. We look at whether the strategy will raise awareness, generate leads and create thought leadership.

**Sales Strategy:** We evaluate the vendor's proposed use of direct and indirect sales and related investments to add new customers and/or extend sales within existing customers. Further, this includes the extent to which the vendor articulates a clear, consistent and relevant sales strategy that resonates with enterprises. In addition, this includes how the vendor leverages new pricing models that are emerging due to market and technology transitions.

**Offering/Product Strategy:** We evaluate the vendor's wired and wireless LAN product strategy. This includes key areas of focus and specific planned product enhancements the vendor has on its roadmap. When looking at roadmap plans, we look at value to target enterprise customers, range of customers impacted and market timeliness. We also assess whether the vendor closes key gaps in its existing offering. This is an assessment of the vendor's most impactful enterprise plans, not every single feature on the roadmap.

**Business Model:** We evaluate the design, logic and execution of the vendor's business proposition to achieve continued growth and success, including alignment and positioning, packaging, and pricing strategies to sell cloud, hybrid or on-premises offerings.

**Geographic Strategy:** We assess whether the strategy is consistent and will resonate with enterprises in order to add or sustain customers on a global basis. We assess multiple aspects of the vendor's plans to address specific needs within particular geographies, including localized technical support, documentation and product UIs.

**Market Understanding:** We assess the vendor's ability to understand the current and emerging wired and wireless LAN needs of enterprises. Further, we look at the vendor's self-awareness of its strengths and weaknesses, and its ability to recognize the competitive landscape in the market.

**Innovation:** We evaluate the vendor's plan to drive market innovation, including bringing unique and valuable capabilities to enterprises that add new value and/or to solve existing challenges in a more effective manner. We assess whether the vendor's most recent and planned innovations will add enterprise customer value, whether they're unique or

differentiated, and whether they're true "game-changers." The majority of the weighting for this category is applied to future innovations, not current in-market capability. Innovation is not simply a list of new features/functionality or product improvements; it can be created across multiple areas, including product, pricing, go-to-market, use cases and the like. The most impactful innovations change the "tenor" of a market in terms of customers. Hence, we assess whether the vendor's innovations will disrupt the market via shifting enterprise customer expectations and/or forcing competitors to react.

**Vertical Strategy:** We assess whether the vendor has a strategy to direct investment into product offerings and dedicated resources to meet the needs of enterprise wired and wireless network buyers in specific industry segments.

**Completeness of Vision Evaluation Criteria**

| *Evaluation Criteria* | *Weighting* |
|---|---|
| Market Understanding | High |
| Marketing Strategy | Medium |
| Sales Strategy | Medium |
| Offering (Product) Strategy | High |
| Business Model | Low |
| Vertical/Industry Strategy | Medium |
| Innovation | High |
| Geographic Strategy | Low |

Source: Gartner (June 2025)

# Quadrant Descriptions

## Leaders

A Leader can address current requirements in the market, and also influence and impact future market direction. Leaders typically have strong offerings that address multiple use cases today, and have strategic plans that are well-aligned with emerging user needs across multiple use cases into the future. The vendor has strong potential to drive, shape and transform the market going forward. A Leader typically has good visibility among customers/prospects, strong products (including hardware and software), a sizable installed base of customers, and financial strength. Further, a Leader typically maintains positive relationships with its customers on a global basis. A Leader typically is increasing its investments in the wired and wireless LAN market. However, Leaders may not fully address the specific needs of specialized market segments (such as a vertical market, geographic region or specific use case).

## Challengers

A Challenger has a proven ability to address current end-user requirements in the market. A Challenger typically has good visibility among prospective buyers, a sizable installed base of customers, financial strength and products that are more than good enough for multiple use cases. However, a Challenger's strategy and roadmap are typically narrower, or haven't kept up with recent innovation pace, compared with Leaders and are consequently less likely to transform the enterprise market going forward. Larger vendors in mature markets may be positioned as Challengers because they choose to minimize risk or avoid disrupting their customers or their own activities.

## Visionaries

Visionaries can disrupt and often help transform the market — from driving new ideas/innovations, including addressing emerging use cases, to solving long-standing enterprise challenges. While Visionaries often have a solid strategy and roadmap, they often lack a consistent, proven ability to address customer challenges in a scalable manner to date. For example, a Visionary may have a limited installed base of customers, lack visibility to prospects, offer only partial geographic coverage, or lack comprehensive product capabilities across all enterprise use-case requirements today.

### Niche Players

A Niche Player may be a perfect fit for your requirements. Niche Players are often focused on specific portion(s) of the market, such as a specific use case, geography, vertical or technological specialty. They have a viable technology, but have not shown the ability to drive the broader market or sustain execution in the broad enterprise market. A Niche Player typically has some limitations that manifest outside of its core focus areas. These limitations often include hardware or software depth, geographic reach, market visibility, target customers and installed base. For example, Niche Players may be focused on only certain use cases, geographies or evolving their existing installed base. This focus can create limitations in the broader market, including reducing their ability to address emerging customer needs.

# Context

As enterprises navigate the complexities of modern networking, the wired and wireless LAN infrastructure market is increasingly defined by the pursuit of autonomous networks. This shift from hardware-centric decisions to software capabilities enables proactive management and optimization, driven by I&O leaders' priorities to minimize manual intervention, maximize uptime and ensure reliability.

Unified LAN infrastructure management systems have evolved to offer sophisticated functionalities, yet there is a growing demand for simpler solutions that reduce training requirements while retaining advanced capabilities for complex networking tasks. The focus is shifting towards zero-trust principles, aiming to unify secure access across corporate sites, branch offices and hybrid work environments. Organizations are increasingly relying on all-wireless environments, facing challenges such as seamless onboarding and improving in-building cellular connectivity for both known and unknown visitors. Additionally, there is a notable rise in opex buying models, including consumption models like NaaS (see Note 1).

## Market Statistics

Despite revenue growth in market segments like data center switching and SD-WAN, the overall enterprise network equipment market experienced a 3.1% decline in 2024, marking a significant shift from previous years (see **Market Share Analysis: Enterprise Network Equipment, Worldwide, 2024**). This downturn was primarily driven by a substantial decrease in enterprise wired and wireless LAN revenue, with wired LAN experiencing a 21.6% drop and

wireless LAN revenue declining by 11.8%. In contrast, the broader enterprise network equipment market excluding these segments rose by 7.5%.

- **Enterprise wired LAN:** Revenue fell by 22% in 2024, a stark contrast to the 20% growth seen in 2023, highlighting reduced demand and extended replacement cycles. Economic pressures and shifts in enterprise priorities have led organizations to delay upgrades and extend the life cycle of existing infrastructure.
- **Enterprise wireless LAN:** The market saw a 12% decline in revenue, influenced by macroeconomic factors pushing organizations to delay upgrades. In terms of AP shipments, Wi-Fi 6 (802.11ax) dominated with 72%, followed by Wi-Fi 6E at 8% and Wi-Fi 7 at 4%, reflecting the ongoing transition to newer wireless standards.

## Key Client Questions

- **Understanding trends**: What are the latest trends in the wired and wireless infrastructure market?
- **Vendor evaluation**: What key considerations should be made when evaluating technology vendors for campus networking to ensure informed decision-making?
- **Emerging technologies**: How can AI, 5G, and IoT be leveraged to improve business outcomes?
- **Network security and compliance**: What strategies can be employed to ensure robust network security and compliance with industry standards?
- **Budgeting and cost optimization**: What are the best practices for budgeting and cost optimization in technology spending, and how can organizations negotiate better vendor agreements?

## Market Direction

**Customer demand**: The enterprise LAN infrastructure market is transforming with technological advancements and shifting client expectations. Organizations demand offerings that prioritize autonomy, campus networking software, and low-friction integration with existing IT infrastructures. This presents both challenges and opportunities for vendors to innovate and adapt their offerings to meet these diverse and evolving needs. As AI infused

operations continue to advance, networks will become increasingly self-sufficient, reducing the need for manual intervention and enhancing overall performance and reliability.

**Supply strategies:** Vendors are responding to these changes by developing AI-enabled solutions, expanding flexible deployment options and integrating advanced security models. By aligning their strategies with client demands, vendors can effectively address emerging challenges and capitalize on new opportunities in the evolving market landscape.

# Market Overview

After years of mostly incremental evolution, we are now seeing an increase in pace of change, driven by pent-up demand and newer supply approaches. The enterprise wired and wireless LAN infrastructure market is undergoing a shift towards autonomous networking, driven by the need for enhanced performance, reliability and security. Vendors are increasingly integrating advanced AI networking and operations capabilities into their offerings, enabling networks to self-manage and optimize without human intervention. This evolution is crucial as network environments become more complex, requiring systems that can dynamically adapt to changing conditions.

## Key Market Drivers

### Autonomous Networking and AI Integration

Clients express a strong need for networks that can self-manage and self-optimize, maintaining high performance and uptime. The complexity of modern network environments is driving a shift towards autonomous solutions that leverage AI to automate routine tasks, such as monitoring and troubleshooting. Vendors must deliver AI-driven capabilities that enhance network efficiency and reliability, positioning self-managing networks as a critical differentiator.

### Automation and Life Cycle Management

Automation tools are essential for providing insights into device vulnerabilities, life cycle status and end-of-support timelines. Configuration management is expanding to include validation of network states and life cycle management, ensuring secure and up-to-date infrastructure. Vendors must offer solutions that streamline operations and reduce administrative burdens.

### Adaptive Network Control and Digital Twin Technology

Organizations seek networks that can dynamically adjust resources and prioritize critical users or applications in real time. Adaptive network control is becoming essential for dynamic resource allocation, while digital twin technology offers powerful simulation tools for optimizing network performance. Vendors should provide solutions with real-time adaptability and resource prioritization capabilities.

### Flexible Deployment Options and Consumption Models

There is a growing demand for flexible deployment options across cloud, on-premises and hybrid environments. Clients increasingly prefer subscription-based services that align with operational budgets, minimizing upfront investments. Vendors must offer scalable and adaptable solutions that integrate seamlessly with existing systems and meet diverse client needs.

### Software-Centric Purchasing Decisions

The focus has shifted from hardware to software capabilities that enhance network performance and resilience. Clients prioritize software solutions with comprehensive instrumentation, optimization and troubleshooting capabilities, emphasizing rapid deployment and consistent functionality across all sites. Vendors must deliver robust campus networking software solutions that integrate seamlessly with existing infrastructure.

### Security and Onboarding Innovations

New security models, such as UZTNA, are emerging to secure remote and hybrid workforces. Vendors should focus on innovative security models that enhance user experience and reduce complexity, offering seamless connectivity for employees working in various locations.

### LAN Integration With Security Architectures

There is increasing demand for integration with broader security architectures, such as firewalls and security service edge (SSE) clouds. Vendors need to offer integrated solutions that address both networking and security needs, ensuring cohesive and resilient security strategies.

### Beyond Wi-Fi

Interest in private mobile networks and in-building cellular solutions is growing, extending connectivity options beyond traditional Wi-Fi networks. Vendors should expand offerings to include diverse communication and connectivity options, enhancing cellular coverage and capacity in various environments.

## How Buyers Shape Their Buying Decisions

In the enterprise LAN infrastructure market, purchasing decisions are increasingly focused on software capabilities that improve network performance and resilience. Buyers are looking for solutions with AI integration for autonomous networking, which allows for self-management and optimization to ensure consistent performance and uptime. Automation tools are important for managing device life cycles and maintaining secure infrastructure.

There is also interest in adaptive network control and digital twin technology for efficient resource allocation and network performance. Buyers prefer flexible deployment options, whether in the cloud, on-premises or hybrid, and often choose subscription-based or opex models for budget alignment. Security features and integration with broader security architectures are essential for supporting remote and hybrid workforces. Furthermore, there is a growing need for connectivity options beyond traditional Wi-Fi, such as private mobile networks. This approach requires vendors to provide software solutions that work well with existing systems and meet various organizational requirements.

## Incumbency and Vendor Relationships

Organizations often remain with incumbent vendors if their technology portfolio meets needs and expectations. The network market is relatively conservative and risk-averse, so incumbent relationships often persist even when technology alignment is suboptimal. Pricing differences and support experiences can drive clients to switch vendors. Clients report that significant price differences, especially on hardware like access points and switches, influence their decision to change vendors. Additionally, support quality — whether directly from the vendor or through a reseller — plays a crucial role in vendor retention or switching.

## How Providers Package, Market and Deliver

Traditional consumption models involve sourcing wired and wireless LAN infrastructure through authorized vendor channel partners. Hardware expenditures are typically a one-time cost, inclusive of firmware updates. However, the market is trending towards subscription models, reflecting a shift in how network management platforms and functionalities are delivered.

NaaS is gaining traction, offering a subscription-based model that includes deployment, managed services, flexible licensing and performance SLAs. Innovative consumption models

are emerging, such as NaaS subscriptions based on square footage or per-user increments, providing scalable solutions tailored to organizational needs. This approach offers a transparent infrastructure similar to cloud services, focusing on business outcomes and SLA requirements, rather than specific device models or topologies.

### Market Recommendations

To navigate the evolving landscape, I&O leaders should focus on strategic initiatives that enhance network performance, security, and cost-effectiveness.

**Enhancing hybrid work environments:**

- Implement UZTNA to secure employee access from all locations and prioritize experience monitoring to maintain performance.
- Design resilient on-premises WLANs with robust coverage and easy accessibility to support dynamic work patterns.
- Explore NaaS models to address low utilization and streamline costs.

**Optimizing campus network investments:**

- Shift strategic focus to software capabilities over hardware in campus network budgets, ensuring long-term value and adaptability.
- Rightsize foundational infrastructure by optimizing hardware expenditure and validating software functionality through proofs of value (POVs).

**Improving infrastructure delivery:**

- Conduct competitive RFP processes to unlock innovation, validate pricing and ensure incumbent vendors earn business through fair evaluation.
- Foster stakeholder alignment among I&O staff, leadership and procurement teams, coordinating efforts with performance evaluations.
- Govern vendor relationships by conducting regular review meetings to assess satisfaction and accountability.

## Acronym Key and Glossary Terms

| | |
|---|---|
| AI | Artificial intelligence |
| AP | Access point |
| IP | Internet protocol |
| LAN | Local area network |
| NaaS | Network as a service |
| NAC | Network access control |
| OEM | Original equipment manufacturer |
| OPEX | Operating expense |
| SLA | Service-level agreement |
| SSE | Security service edge |
| UZTNA | Universal zero-trust network access |
| VoIP | Voice over IP |
| WAN | Wide area network |

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## ⊕ Evidence

### Note 1: Gartner’s Definition of Network as a Service

Network as a service is a standardized and highly automated delivery model for networking functionality. It offers support for dynamic scaling up and down of network resources. The NaaS provider owns and operates NaaS offerings. Consumption pricing is on a pay-for-use basis, or as a subscription based on usage metrics. Typically, self-service interfaces — including an API and a user portal — are exposed directly to customers for self-service.

## ⊕ Evaluation Criteria Definitions