Global Headquarters: 5 Speen Street Framingham, MA 01701 USA P.508.872.8200 F.508.935.4015 www.idc.com

EXCERPT

IDC MarketScape: Worldwide Enterprise WLAN 2013–2014 Vendor Analysis

Rohit Mehra

IN THIS EXCERPT

The content for this excerpt was taken directly from the IDC MarketScape: Worldwide Enterprise WLAN 2013-2014 Vendor Analysis by Rohit Mehra (Doc # 231686). All or parts of the following sections are included in this excerpt: IDC Opinion, In This Study, Situation Overview, Future Outlook, Essential Guidance, and Synopsis.

IDC OPINION

The continued proliferation of bring your own device (BYOD) in the enterprise has led to a rapid evolution and sustained growth in the enterprise wireless LAN (WLAN) market. Behind this evolution and growth is an explosion of mission-critical mobility applications and cloud services. Increased mobility needs, especially in verticals such as healthcare, education, retail, hospitality, and logistics, has necessitated that WLAN vendors embed an increasing number of specialized add-on functionalities within their portfolios. To this end, some vendors are seeing the benefit of tailoring their value propositions toward specific verticals. With this, vendors help their portfolios avoid commoditization. However, this adds complexity for end users evaluating WLAN vendor solutions for their enterprise. This study presents IDC's view of the critical success factors for this market in the short and the long term, along with a ranking of how WLAN vendors fare against those factors. Dynamics of the enterprise WLAN market include:

- Enterprises need adaptable, robust, easily deployed, and secure wireless LAN solutions as more users are accessing the enterprise network via mobile devices while increasingly using these devices for mission-critical applications.
- The growth in alternative architectures (cloud, integrated, and virtualized) is continuing to challenge the traditional controller-based model. While these newer approaches can present traffic flow efficiencies for many end users, the incumbent physical controller model does not show signs of obsolescing in the near term. IDC believes that the alternative architectures are all examples of the "controller" manifesting itself in different forms — the inherent management and control functions still need to be performed somewhere on the network.
- The use of WLAN to support enterprise communications continues to grow. Mobile voice/unified communications (UC) and video technologies are two prominent examples of this.

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- Service providers (SPs) have become a more important growth segment for many WLAN vendors as mobile offload infrastructure deployments increase to relieve 3G/4G congestion.
- Software-based management suites are becoming more capable, especially in terms of wired/wireless (unified) and multivendor management. Increased integration with advanced RF tools, location-based services, and other network-enabled tools will drive innovation and differentiation in this realm.

IN THIS STUDY

This IDC study uses the vendor assessment model called IDC MarketScape. This assessment discusses both quantitative and qualitative characteristics that explain a vendor's success in the marketplace and help anticipate the vendor's ascendancy. This is an update of *IDC MarketScape: Worldwide Enterprise WLAN 2011–2012 Vendor Analysis* (IDC #231686, December 2011).

This IDC MarketScape looks at the enterprise wireless LAN market through the lens of indoor WLAN infrastructure, with an emphasis on the current 802.11n standard and various deployment architectures. Capabilities and strategies for the emerging 802.11ac standard also play a role in our analysis. While we evaluate portfolios with capabilities in prior standards (802.11a/b/g) and in outdoor and mesh, these factors play a relatively small role in our considerations. Offerings in the service provider WLAN space for cellular offload and managed services also play a small role in our analysis. Covering a wide variety of vendors participating in the enterprise WLAN market, this evaluation is based on a comprehensive framework and set of parameters that assess vendors relative to one another and to those factors expected to be most conducive to success in this market, for both the short and the long term.

The study is composed of two sections. The first provides a definition or description of the characteristics that IDC believes lead to success in the enterprise WLAN market. These characteristics are based on end-user and vendor surveys and key analyst observations of best practices and were defined with contributions from the broader WLAN ecosystem.

The second part of this study provides a visual aggregation of multiple vendors into a single bubble chart format. This format concisely illustrates the observed and quantified scores of the reviewed vendors. The strategies axis represents a three- to five-year span and future perspective, while the capabilities axis represents current product and go-to-market execution. This document concludes with IDC's essential guidance to support continued growth and improvement of these vendors' offerings.

Methodology

The IDC MarketScape is designed to provide an overview of the competitive fitness of the global solution providers in the enterprise WLAN market. A single chart displays each company's market share and indicates whether it is over- or underperforming and how well it is suited to compete in the market today and in the future (three to five years from now). The accompanying text explains each vendor's major strengths and weaknesses.

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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 participants and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions, on the IDC MarketScape, 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.

IDC employs the following methodology to arrive at each company's ranking:

- **Sources.** This study is based on a model that is populated with data provided to IDC from a vendor questionnaire, companies' quarterly and annual reports, earnings calls, industry analyst events, interviews with company representatives, interviews with end users, IDC research, and news coverage.

- **Market shares, growth rates, and revenue numbers.** This IDC MarketScape covers the enterprise WLAN market. For companies that do not publicly disclose this revenue, IDC estimates revenue and growth rates based on public information, discussions with vendors, knowledge of the industry, and input from regional IDC analysts.

- **Competitive fitness.** Each major competitor's preparedness for current and future market conditions is expressed as a set of two scores. One score expresses a given vendor's current "capabilities," while the other expresses the appropriateness of its "strategies" for the future. (IDC bases its assessment of future market conditions on what most likely will be the market's major trends and disruptors.) Each of the two scores is broken down into three criteria (product offerings, go-to-market capabilities, and business capabilities), each of which is in turn broken down into several subcriteria. Both criteria and subcriteria are weighted by importance for a particular market. For each company, we score its qualities with regard to each of the subcriteria, assigning a numeric value. The IDC MarketScape model uses these values to calculate each company's score for each of the criteria and rolls these values to arrive at the described set of two scores.

Key Factors for Success

- **Global scale, consistency, and support.** IDC believes WLAN vendors that can serve and are easily accessible to multinational and global enterprises across geographies will attract clients that want to deploy consistent IT infrastructures worldwide. Additionally, clients implementing the same WLAN portfolio worldwide will expect consistent customer service and troubleshooting regardless of location. The scoring criteria most heavily influenced by "global scale, consistency, and support" are sales/distribution strategy and customer service strategy.

- **Vertical-specific solutions.** WLAN is used across a variety of enterprises, each with its own unique needs. Good enterprise WLAN vendors will demonstrate core

competencies in a range of specific verticals through delivery model, deployment model, and management applications. The scoring criteria that address this area are "delivery model," "portfolio strategy," "marketing strategy," and "vertical capabilities."

- **Unified access capabilities.** Wireless (WLAN) currently cannot exist without a wired infrastructure. However, there are variations in how WLAN infrastructures interact with the wired network. Good WLAN vendors will use standards-based integration technology to facilitate integration without major modifications to either the wired or the wireless infrastructure. Ideally, unified access will allow for single-platform network management, security and policy enforcement, and seamless QoS. Of course, incumbents in the wired networking segment have the opportunity to integrate their management platforms, but many pure-play WLAN vendors also provide superior wired integration capabilities. The scoring criterion most heavily influenced by "unified access capabilities" is "integration capabilities/future integration strategy."

- **Networking-savvy distribution channel with wireless/RF capabilities.** A good vendor will ensure the partners within its distributor, systems integrator, and reseller channel will possess a high degree of networking and, where applicable, managed services expertise. These vendors will display knowledge of networking needs in their sales, presales engineering, and marketing efforts and be able to provide effective first-level support. In addition to the networking component, a successful channel partner will have experience and proficiency with RF infrastructures. The scoring criteria most heavily influenced by "networking-savvy distribution channel" are "sales and distribution strategy," "range of services strategy," and "customer service strategy."

- **Breadth of ecosystem partners to provide complete solution.** To prevent commoditization of WLAN offering, vendors are increasingly savvy about entering ecosystem partnerships that enhance add-on functionalities such as asset tracking, security, VoIP integration and, more recently, application visibility and location-based services, among others. This is especially important for vendors targeting specific verticals. Similarly, a smart vendor strategy can encompass entering into strategic interoperability and sales and distribution partnerships with networking technology providers to increase penetration and brand value. The scoring criterion that addresses this area is "partnership strategy."

- **Multifaceted go-to-market strategy.** In an increasingly crowded market with a growing number of offerings, an effective marketing strategy that can reach all targeted segments and customers is essential. At the core of any go-to-market strategy is a differentiated and easily understood value proposition. However, effective communication of this proposition is essential. Good vendors will consistently utilize a combination of marketing and thought leadership collateral, white papers, online campaigns and advertising (including blogs and social media), targeted email campaigns, and strategic expositions and trade shows, among other methods to gain credibility and mindshare. The scoring criteria that address this area are "marketing strategy" and "vertical-specific capabilities."

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- **Application development platform with the ability to add network intelligence services.** Owing to vertical- or business-specific needs, clients may be interested in network applications that a WLAN vendor may not offer. An ideal vendor will partner, as appropriate, in the areas of desired application(s) that can run as add-ons to the WLAN's OS. In other words, the WLAN vendor is willing and able to integrate third-party solutions that allow the adding of incremental functionality without it coming directly from the vendor. These solutions typically have SKUs (but may also be part of a bundled solution) and a pricing structure and are available as a licensed application so customers can buy and deploy as needed. The scoring criteria most related to this success factor are "customer service strategy," "partnership strategy," and "innovation/R&D strategy."

SITUATION OVERVIEW

Introduction: Drivers for Enterprise WLAN

The business case for introducing a WLAN to the enterprise is a bit different for every enterprise, but there are some common reasons that abound. IDC's belief, supported by customer interviews and studies of the industry, is that there are multiple reasons for an enterprise to be WiFi enabled:

- **Explosion of mobility with BYOD.** The increasing presence of mobile devices in the enterprise simply lends to more demand for wireless capabilities. Smart mobile devices, whether individually owned or corporate owned, have exploded in the enterprise — with users of these devices needing, and demanding, connectivity for an ever-growing variety of business applications, some of which require multimedia connectivity with no latency.

- **Business/vertical-specific functionalities.** Although many enterprises find it beneficial to offer WiFi access to their end users and guests/visitors, the majority of enterprise WLAN is still deployed for business-critical applications. Whether managing inventory in a warehouse, accessing medical records while on the move, or accepting payments in a retail store, enterprises are finding that wireless networking allows them to run their businesses more effectively. This is perhaps the largest factor in the significant growth of the enterprise WLAN market.

- **Client-side demands.** Customers of enterprises in hospitality look at the availability of wireless Internet as critical for business (and pleasure). With more widespread use of mobile devices such as smartphones and tablets in addition to strong laptop usage, enterprises need to be able to respond with reliable, cost-effective wireless networks. Additionally, in verticals such as education (higher education and K–12) and healthcare, institutions are increasing their deployments of mobile applications, further increasing the demand for wireless.

- **Gradual transition to an "all-wireless" network edge.** Many of the networking functionalities for which enterprises depended on a wired infrastructure can be increasingly performed through wireless networking. Enterprises are seeing the value of being able to forego Ethernet cables and connect wirelessly, especially

with mobile devices proliferating in the enterprise. Moreover, with its high-bandwidth capabilities, WLAN can increasingly improve the experience with multimedia applications. Handheld and other WiFi-capable wireless devices have also found their way into different verticals to support mission-critical applications, as in healthcare. Once a "nice to have" piece of the network infrastructure, WLAN is now an integral part of the enterprise network.

Current Market Dynamics

- **Bring your own device.** As mentioned previously, employee-owned mobile devices such as smartphones and tablets are proliferating in today's enterprise. Many of these users need access to corporate applications to help improve their productivity. In many cases, this may lead to network congestion, especially where the network was not designed with this kind of device and traffic loads in mind. Also, security and application prioritization are a key concern. This has contributed to BYOD being one of the most important decision factors for enterprises extending or implementing new WLANs. Additionally, enterprises must be mindful of provisioning and configuration capabilities to ensure traffic optimization as well as device health monitoring to prevent network disruption.

- **Improving the provisioning and onboarding experience.** With the BYOD boom introducing record numbers of mobile devices onto enterprise networks, it is important for a WLAN deployment to provide automated provisioning and onboarding capabilities. Ideally, these are seamlessly integrated into the WLAN management platform. Many vendors offer one-click automated solutions that provide encrypted access keys and require little to no physical involvement from IT staff.

- **Video and multimedia over wireless.** Multimedia-rich collaboration applications are exploding within the enterprise. Whether due to the increasing use of videoconferencing (including Skype), the use of corporate or recreational video (YouTube), or the use of voice or unified communications, end users are increasingly making WLAN choices based on the vendor's ability to deliver high-quality multimedia over the network without latency or jitter.

- **Security implications.** Advances in security offerings can be overwhelming for technology buyers. An adequate level of network security is table stakes for any vendor expecting to compete in this market. However, some vendors are becoming more sophisticated in offering security features tailored to the specific needs of different verticals. Some of the advanced features to be aware of are compliance with standards such as PCI DSS and HIPAA. Many vendors have made progress toward having fully capable wireless intrusion prevention services (WIPS) that monitor the network, detecting and protecting against rogue activity.

- **Service provider WiFi for mobile offload and managed services.** As more carriers seek mobile (cellular) offload solutions and more enterprises in the hospitality and retail verticals elect to provide secure WiFi capabilities to their customers, the relevance of carriers and managed service providers (MSPs) as target market segments has gone up significantly. Service provider WiFi will be an important differentiation factor for vendors that can provide a robust solution

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while offering adequate authentication and handoff capabilities. MSPs need solutions that allow them to manage varying architectural deployments of distributed WLANs from their NOCs or datacenters. Also, SP solutions will need to support Hotspot 2.0 — the standard for public WiFi networks with seamless handoffs and roaming between networks. Similar to BYOD, vendors will need to not only demonstrate the ability to handle a device-dense environment but have a compelling managed services offering with appropriate channel and go-to-market strategies.

- **The emerging 802.11ac standard.** Given that the explosion of BYOD and mission-critical mobility applications shows few signs of abating, a new standard is emerging in WiFi to provide better speed, capacity, and throughput while minimizing interference. WLAN vendors are in the early stages of introducing 802.11ac, also known as "gigabit WiFi"; 802.11ac promises maximum (theoretical) speeds of 1.35Gbps compared with the current maximum of 450Mbps. Most vendors will introduce "first wave" platforms of 802.11ac before full IEEE ratification of the standard, which is expected in early 2014.

Current and Emerging WLAN Architectures

The high-performance 802.11n standard (finally ratified in 2009) brought to wireless LANs new levels of throughput, along with other benefits such as improved coverage. What it also did was bring about another level of discussion around the limits of bandwidth that WLANs could handle (as controllers became choke points), not to mention the overhead of the added traffic being brought back across the network. With even higher-performance WLANs expected to be available (now up to 1.3Gbps with emerging 802.11ac APs), controller vendors have added "direct forwarding" to their deployments models, enabling traffic to be directly routed from APs or, in some cases, from the nearest ingress wired switch connected to the AP. The differentiation is mainly around how one separates management and control traffic (or plane) from the data traffic around these wireless LANs. Currently shipping WLAN architectures include:

- **Controller based.** As mentioned previously (see the Product Category section), access point controllers typically manage access to the network, load balance users, enforce security policies, and provide a number of higher-level network services. Now considered the "conventional" delivery method of WLAN in the enterprise, many vendors' offerings center around architectures that feature a controller that hosts several access points within a limited physical space. Controllers can range in size depending on the size, structure, and applications of the enterprise and may be either distributed or centralized (with a single high-capacity controller managing APs across multiple remote sites).

- **Integrated/virtualized.** In some instances, vendors are offering solutions where the "controller" manifests itself in different forms, either in terms of software capabilities that run on each of the APs (integrated/controller-less) or by virtualizing the controller and running it on a server of choice.

- **Cloud based.** Another alternative to the controller-based model is cloud-based WLANs that allow for virtualized AP management that is less hardware intensive.

The controller is based in the cloud, with IT having some AP management capabilities through a Web-based platform. The case for cloud-based WLAN architectures is especially attractive within the distributed midsize enterprise, where smaller sites benefit from centralized management and control and not having to deal with a physical controller.

- **Hybrid model.** Where vendors are offering multiple architecture options, they are also adding hybrid options bundling some of the benefits of the alternate architectures to help differentiate their offering and capabilities.

- **Standalone APs.** The original delivery model for WLAN, standalone APs connect WiFi signal to the wired router without the centralized management and control benefits of controllers. Currently, standalone APs are seen mostly in legacy deployments. However, some controller-based APs have the ability to convert to standalone in the case of controller failure.

FUTURE OUTLOOK

IDC MarketScape: Worldwide Enterprise WLAN Market Vendor Assessment

The IDC vendor assessment for the enterprise wireless LAN market represents IDC's opinion on which vendors are well positioned today through current capabilities and which are best positioned to gain market share over the next few years. Positioning in the upper right of the grid indicates that vendors are well positioned to gain market share. For the purposes of discussion, IDC divided potential key strategy 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 the 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 strategic decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the future, in this case defined as the next three to five years. Under this category, analysts look at whether or not a supplier's strategies in various areas are aligned with customer requirements (and spending) over a defined future time period.

Figure 1 shows each vendor's position in the vendor assessment chart. A vendor's market share is indicated by the size of the bubble. Vendors, depending on their scores, may fall into the Leaders, Major Players, Contenders, or Participants category.

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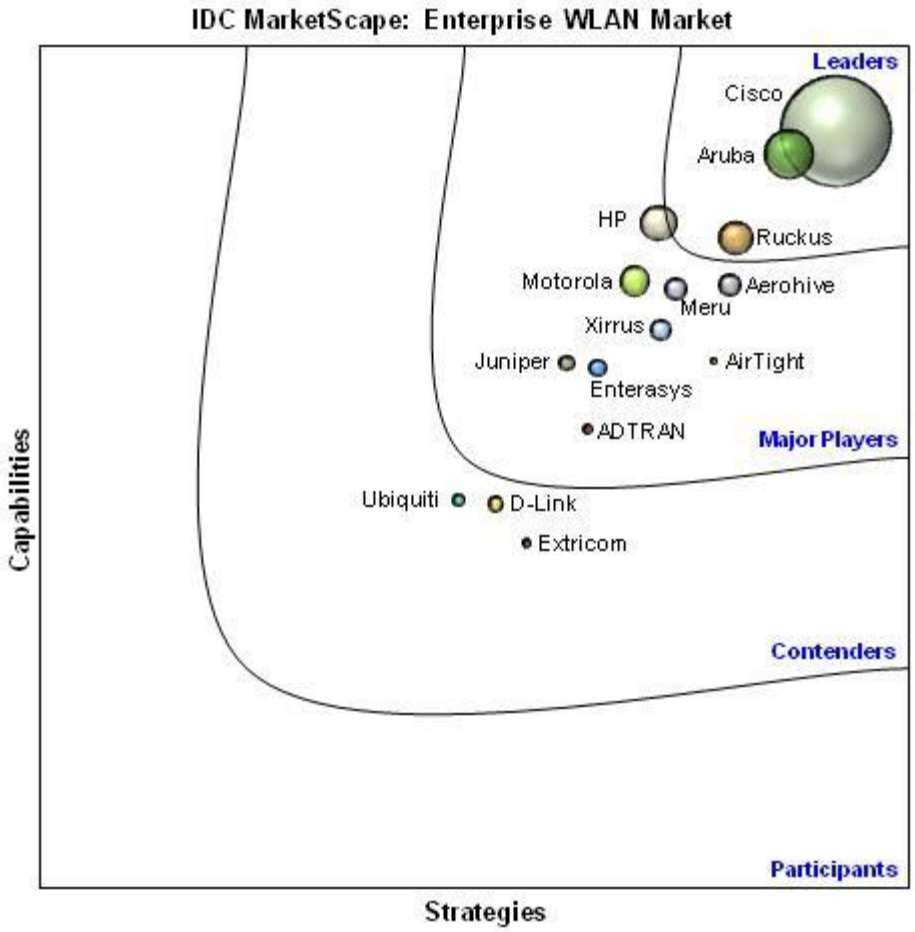
FIGURE 1

IDC MarketScape Worldwide Enterprise WLAN Vendor Analysis



Source: IDC, 2013

Market Analysis

This analysis supports that the vendors in the WLAN market continue to demonstrate competence with regard to product offerings, customer support, and innovation. In particular, the overall WLAN market has performed well in the areas of pricing/packaging, wired/wireless integration, BYOD security and ease of use, multimedia delivery, and using ecosystem partnerships to add further value to product portfolios. These are strong capabilities being leveraged in the market — capabilities that appear to be on track to become even stronger strategies. An area in which IDC predicts overall market improvement in the next three to five years is in the development of robust 802.11ac solutions that seamlessly support the multiyear migration to 5GHz devices. Currently, only a handful of vendors have announced 802.11ac offerings, but look for all WLAN vendors to have some offering by early

2014. IDC predicts there will be a rapid evolution of vendor differentiation within the 802.11ac APs offered in the market.

Why Some Vendors Are Not Rated

Given the rapid growth in this market that has led to a high degree of competition between incumbent WLAN vendors and ambitious upstarts, there are more companies selling WLAN equipment than we are able to cover in this study. For inclusion in this IDC MarketScape, vendors had to meet strict guidelines on revenue, shipment history, portfolio offerings, and WLAN business viability. IDC chose 15 vendors that fully met these guidelines.

Vendor Profiles

Ruckus

Known to some as the "fun" provider of WLAN solutions, Ruckus, on the heels of its November 2012 IPO, has grown to be the fourth-largest enterprise WLAN provider by revenue. While Ruckus' original business focus was to leverage its multimedia capabilities over WiFi in Internet Protocol television (IPTV) and its carrier business, Ruckus has now transitioned into broader enterprise deployments as well as wireless (cellular) offload rollouts. Ruckus has made good inroads in the service provider market, initially in Asia and subsequently in other regions. Ruckus is rated a Leader in this IDC MarketScape.

Ruckus' BeamFlex beamforming technology and dual-polarized smart antenna arrays allow for efficient spatial multiplexing, and Ruckus claims improved coverage in tough environments with fewer APs. Relative to other vendors in targeted segments such as hospitality and service providers, Ruckus is thought to be cost competitive. Nonetheless, Ruckus has a strong history of internal innovation, from the pioneering of IPTV to various advances in antenna technology, including being an industry pioneer in adaptive antenna array and many other advanced RF functionalities.

As Ruckus continues to grow at an impressive rate, it continues to add to and refine its value proposition. Presently, Ruckus is adding a focus on the undertapped retail, warehousing, and public access markets in addition to its traditional midmarket and the hospitality, education, and healthcare segments. As mentioned, Ruckus enjoys many successful deployments in tough RF environments such as stadiums, arenas, warehouses, and older buildings, among other examples. Ruckus offers strong technical support and can design highly customized implementations for its clients. Additionally, provisioning and configuration of out-of-the-box experiences are among the easiest in the industry. Ruckus offers good training for its new clients through company engineers and VARs. Through its Ruckus University training offering, clients can access videos that train on how to set up and use all the WLAN tools straight out of the box.

Additionally, Ruckus continues to leverage its multimedia traffic capabilities to help with the deluge of smart mobile devices and social media in the enterprise (BYOD). Through its traffic-shaping abilities, Ruckus can support delivery of multicast and unicast IP video in discrete queues for client devices. Finally, it is noteworthy that

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Ruckus' ZoneFlex WLAN system offers a fairly simple point-and-click configuration wizard.

In terms of challenges, Ruckus, a pure-play WLAN vendor, is unable to offer unified (wired/wireless) networking solutions, which may present an issue for some IT managers looking to deploy a single-vendor infrastructure. However, multivendor integration is standards based and relatively simple. Ruckus also does not offer the architectural breadth of delivery model options relative to the other larger players (e.g., cloud) in the market but continues to offer a controller model with a flexible management option as well as a virtualized management platform construct. Finally, Ruckus faces a challenge to maintain its high levels of service and innovation in the face of explosive growth.

Areas of Opportunity

Ruckus' ongoing success and growth present tremendous opportunities to enter new markets and new verticals and to develop more robust offerings geared toward greater and larger audiences. Expanding the range of architectural delivery options will help Ruckus continue to compete strongly against Cisco, Aruba, and HP. As carrier and public WiFi deployments become more important, Ruckus also has the opportunity to reassert its dominance in the carrier and SP markets that initially provided the springboard for broader success in the market. Finally, 802.11ac, which Ruckus has not announced at the time this document was written, gives Ruckus the opportunity to further leverage its RF capabilities and advancements. It is important that Ruckus stay ahead of the curve on its 802.11ac offerings as several of the larger players have already announced their offerings.

ESSENTIAL GUIDANCE

Advice for End Users/Enterprise IT

Organizations considering deploying new WLANs need to take a look at how implementing the new technology will affect overall network infrastructure as well as business-critical applications in both the short and the long term. The enterprise's existing physical IT and network infrastructure and geographical distribution and the types of applications and devices being run on the WLAN will have different implications for the delivery model and architecture of the WLAN solution.

In this economy, a business case for enterprise WLAN must include a mix of business and IT benefits. Business cases that clearly demonstrate improved efficiency of mission-critical applications are more likely to garner support. Similarly, any case that demonstrates reduced operating costs should be well received.

In addition to all the information presented in this document for evaluating vendors, we can boil the evaluation criteria, at minimum, into five major points:

- The "BYOD" phenomenon and its implications (including security)
- The ability to handle data/voice/video applications

- Proactive versus reactive response to emerging enterprise technologies such as "cloud"
- Options for different types of deployments
- 802.11ac road map and customer upgrade options

Advice for Vendors

Right now is an exciting time for the enterprise WLAN market because enterprises of all sizes are seeing a greater need than ever for WLAN technology. To this end, IDC advises offering strategies that are easy to understand, and with technology that is easy to deploy. Many enterprises have small IT staffs, many of which have less experience with wireless networking than with wired. Offering comprehensive training in the initial deployment process is invaluable for client longevity with your company. Highly accessible ongoing training is a true differentiator in this market.

Moreover, enterprises have changing needs and desire flexibility from their WLAN providers. While it can be strategically advantageous to specialize on key verticals and enterprise size segments, having a solution that can scale with a company as it grows is advisable. Similarly, more and more enterprises are implementing large-scale distributed deployments — often across regions or countries. Vendors will need to ensure their portfolios offer the management tools for these types of enterprises.

Ecosystem partnerships not only add value but, in certain capabilities (e.g., asset tracking, VoIP, advanced security), are increasingly expected as table stakes. IDC believes that the evolution in WLAN ecosystem partnerships is positive. Vendors will need to continually challenge themselves to differentiate through partnerships.

Finally, the importance of marketing can never be underestimated. IDC finds that many vendors focus on developing excellent value propositions while neglecting to pay attention to their messaging. Good WLAN marketers should continue to use traditional advertising channels such as email, channel, and online campaigns while also increasingly devoting resources to inbound, content-based marketing (i.e., blogs, Webinars, and social media) and thought leadership. VARs and other resellers should also have attractive, informative materials to present to end users. Many WLAN marketers are adept at communication technological specifications but always need to keep in mind that IT buyers are not necessarily the IT professionals within an organization.

LEARN MORE

Related Research

- *Worldwide WLAN 2Q13 Market Share Update* (IDC #243383, September 2013)
- *Worldwide Ethernet Switch and Router 1Q13 Market Share Update* (IDC #241957, June 2013)

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- *Worldwide Enterprise Network Infrastructure 2013–2017 Forecas*t (IDC #240997, May 2013)
- *Worldwide Service Provider WiFi Infrastructure 2013–2017 Forecast: Poised for Continued Growth* (IDC #240988, May 2013)
- *Predictions 2013: Enterprise Communications and Datacenter Networks* (IDC #WC20130110, January 2013)

Synopsis

This IDC study introduces the vendor assessment model called the IDC MarketScape to the worldwide enterprise wireless LAN (WLAN) market. The methodology behind this model uses both quantitative and qualitative assessments of vendors' characteristics that explain vendors' success in the marketplace and can help anticipate vendors' ascendancy. This study covers a variety of vendors that provide wireless LAN solutions that are an integral component of network communication infrastructures within an enterprise. This evaluation is based on a comprehensive framework that assesses vendors across a wide variety of technical and operational criteria, weighted by factors IDC expects will be the most influential for short- and long-term market success.

"The explosion of mobile devices within the enterprise has introduced a new dynamic into the enterprise WLAN market. This market is rapidly evolving as vendors and end users alike discover more possibilities and growth potential with mobile enterprise applications and cloud applications and services — including the fact that these are closely intertwined with each other." — Rohit Mehra, director, Enterprise Communications Infrastructure

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