

Enterprise Network Infrastructure Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Technology (Routers & Switches, Storage Area Network, Infrastructure Firewalls, Wireless LAN, Enterprise Telephony), By Industry (Healthcare, Retail and eCommerce, Banking, Financial Services, & Insurance, Government & Defense, Information Technology & Telecommunications, Manufacturing, Others), By Enterprise Size (SMEs, Large Enterprises), By Region, By Competition, 2018-2028

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Abstracts

Global Enterprise Network Infrastructure Market was valued at USD 59.4 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.4% through 2028. The Global Enterprise Network Infrastructure Market is experiencing a significant upswing, fueled by the relentless pace of digital transformation in businesses worldwide. Companies are investing heavily in upgrading their network infrastructure to keep pace with the demands of the modern digital age. This transformation is driven by factors such as the proliferation of cloud computing, the adoption of IoT devices, and the increasing need for seamless, high-speed, and secure connectivity. Businesses are prioritizing robust network solutions to ensure efficient communication, collaboration, and data management. Moreover, the shift towards remote and hybrid work models, accelerated by recent global events, has intensified the demand for scalable and reliable network infrastructure. Security concerns also play a pivotal role, prompting organizations to invest in advanced networking technologies that can safeguard

sensitive data from cyber threats. As a result, the market is witnessing a surge in the deployment of cutting-edge networking equipment, software-defined solutions, and cybersecurity measures, marking a transformative phase in how enterprises approach their network infrastructures to meet the demands of the digital era.

Key Market Drivers

Growing Digital Transformation Efforts

The rapid pace of digital transformation initiatives across industries is acting as a powerful catalyst, driving substantial growth in the Global Enterprise Network Infrastructure Market. As businesses increasingly recognize the pivotal role of technology in gaining a competitive edge, they are investing significantly in upgrading their network infrastructures. Digital transformation encompasses the integration of advanced technologies like cloud computing, IoT devices, artificial intelligence, and data analytics into existing business processes. These technologies demand robust, secure, and high-performance network infrastructures capable of handling massive data volumes, ensuring seamless communication, and enabling real-time data analysis. With the rise of remote work culture and the need for agile, interconnected systems, companies are prioritizing networks that can facilitate efficient collaboration and secure remote access. Moreover, the proliferation of mobile devices, smart appliances, and IoT sensors necessitates networks that can handle diverse device types and communication protocols. Additionally, as businesses migrate their operations and data to the cloud, there's a growing demand for high-speed and reliable connections to access cloud resources. Furthermore, the integration of hybrid cloud architectures, combining on-premises infrastructure with cloud services, requires intricate networking solutions to ensure seamless data flow between environments. This surge in demand for advanced network infrastructures is reshaping the market landscape, prompting innovation from network infrastructure providers who are developing scalable, secure, and energy-efficient solutions. Consequently, the Global Enterprise Network Infrastructure Market is witnessing a transformative phase, characterized by the development of cutting-edge technologies that can support the evolving needs of businesses embracing digital transformation. As companies continue to invest in modernizing their operations, the demand for adaptable and efficient network infrastructures is poised to escalate, driving further advancements and reshaping the future of global business networking.

Rise in Remote Work Culture

The rise in remote work culture has emerged as a driving force behind the transformative growth of the Global Enterprise Network Infrastructure Market. With the paradigm shift towards remote and hybrid work models, businesses are undergoing a profound transformation in their operational strategies. This shift necessitates a robust, secure, and agile network infrastructure capable of supporting seamless remote connectivity. Employees now rely heavily on virtual private networks (VPNs) and cloud-based collaboration tools, demanding high-speed and reliable network connections to ensure uninterrupted communication and efficient workflow management. The surge in video conferencing, file sharing, and collaborative project management tools has exponentially increased data traffic, requiring scalable and low-latency networks. Additionally, businesses are emphasizing cybersecurity measures, leading to increased investments in advanced firewalls, intrusion detection systems, and encryption technologies to safeguard sensitive data transmitted across remote connections. Furthermore, as companies adopt cloud-based applications and migrate their data to cloud platforms, the need for secure access to cloud resources has become paramount. This trend has accelerated the adoption of Software-Defined Networking (SDN) and cloud-based networking solutions, enabling businesses to centrally manage and secure their network infrastructures. Moreover, the demand for virtual private cloud (VPC) services and dedicated internet connections for remote employees has surged, driving innovations in network architecture. The remote work culture has essentially redefined the parameters of efficient business operations, making network infrastructure a linchpin for organizational success. As businesses recognize the enduring nature of remote work and its implications for productivity and talent acquisition, the Global Enterprise Network Infrastructure Market is witnessing a surge in demand for cutting-edge solutions. Providers are responding with innovations in software-defined networking, secure cloud connectivity, and bandwidth optimization, paving the way for a dynamic and resilient global business landscape fueled by a robust network infrastructure backbone.

Emphasis on Cybersecurity

The heightened emphasis on cybersecurity stands as a driving force propelling the rapid evolution of the Global Enterprise Network Infrastructure Market. In an era where digital threats are becoming increasingly sophisticated, businesses are prioritizing the fortification of their network infrastructures against potential cyber-attacks and data breaches. This imperative for enhanced security has sparked a surge in demand for advanced network solutions equipped with state-of-the-art cybersecurity features. Companies are investing significantly in next-generation firewalls, intrusion detection and prevention systems, and advanced encryption protocols to safeguard sensitive data

traversing their networks. Additionally, the proliferation of remote work has necessitated the implementation of secure virtual private networks (VPNs) and multifactor authentication systems, ensuring secure access to corporate networks from various locations. The rising instances of ransomware attacks and phishing attempts have underscored the importance of proactive cybersecurity measures, prompting businesses to adopt cutting-edge technologies that can swiftly detect and mitigate security threats. Furthermore, compliance with stringent data protection regulations, such as GDPR and CCPA, mandates the implementation of robust cybersecurity protocols within network infrastructures. As a result, the Global Enterprise Network Infrastructure Market is witnessing a surge in innovative solutions, integrating artificial intelligence and machine learning algorithms for threat detection, as well as comprehensive security analytics for real-time monitoring and incident response. This heightened emphasis on cybersecurity not only fortifies businesses against potential financial losses due to breaches but also enhances customer trust and loyalty. As the threat landscape continues to evolve, enterprises are expected to further intensify their focus on cybersecurity, driving continuous innovation and investments in advanced network infrastructure technologies to ensure the resilience and security of their digital operations.

Adoption of 5G Technology

The adoption of 5G technology is fueling a paradigm shift in the Global Enterprise Network Infrastructure Market. With its promise of unprecedented speed, low latency, and seamless connectivity, 5G is reshaping the way businesses operate. Enterprises are increasingly leveraging 5G networks to power a wide array of applications, from IoT devices to augmented reality (AR) and virtual reality (VR) experiences. The sheer speed and reliability of 5G connections are revolutionizing industries, enabling real-time data processing and fostering innovation in ways previously deemed unattainable. Industries reliant on instant data transmission, such as healthcare and manufacturing, are benefiting immensely from 5G's capabilities, enhancing remote patient monitoring, enabling precision manufacturing, and bolstering supply chain management. Moreover, 5G technology is pivotal for enabling the proliferation of autonomous vehicles, smart cities, and advanced logistics networks, all of which rely on lightning-fast and highly responsive communication systems. As businesses harness the transformative potential of 5G, the demand for robust network infrastructure capable of supporting these high-speed connections has skyrocketed. Companies are investing significantly in upgrading their networks to harness 5G's capabilities fully, necessitating the deployment of advanced networking solutions. Moreover, the rise of edge computing, which processes data closer to the source, is intricately linked with 5G technology. Edge computing

demands ultra-low latency, making 5G networks the ideal backbone for its implementation. As a result, businesses are not only integrating 5G but also reimagining their entire network infrastructures to embrace the era of ultra-fast, real-time data processing. This shift is reshaping the market landscape, spurring innovations in network architecture, cybersecurity, and data management. The adoption of 5G technology is not merely a technological upgrade but a strategic imperative, enabling businesses to remain competitive in a digital landscape where speed, responsiveness, and innovation are the defining factors of success.

Key Market Challenges

Compatibility and Interoperability Issues

The Global Enterprise Network Infrastructure Market faces significant challenges due to compatibility and interoperability issues. In an increasingly interconnected world, businesses rely on diverse technologies and systems, often sourced from different vendors. However, integrating these varied components into a seamless network infrastructure poses substantial hurdles. Compatibility problems arise when new technologies don't align with existing systems, leading to inefficiencies and operational disruptions. Interoperability issues compound the problem, making it difficult for different systems to communicate effectively. This lack of harmony can hinder data exchange, compromise security, and impede collaborative efforts. Moreover, businesses investing in emerging technologies face the challenge of ensuring these innovations integrate smoothly with their existing infrastructure. Vendors and IT departments often struggle to bridge the gaps between legacy systems and cutting-edge solutions. As a consequence, companies grapple with increased implementation times, higher costs, and reduced productivity. The market demand for comprehensive, interoperable solutions has intensified. Enterprises seek network infrastructure providers capable of offering seamless integration services, addressing compatibility concerns, and ensuring efficient interoperability between diverse components. Overcoming these challenges is paramount for businesses aiming for a cohesive, responsive, and secure network environment, underscoring the critical need for innovative solutions in the Global Enterprise Network Infrastructure Market.

Security and Data Protection

Security and data protection pose significant challenges in the Global Enterprise Network Infrastructure Market. In an era where digital assets are invaluable, ensuring the safety and confidentiality of data has become a paramount concern for businesses.

Cybersecurity threats, ranging from malware attacks to sophisticated hacking attempts, constantly jeopardize sensitive information. This evolving threat landscape necessitates robust measures to safeguard network infrastructures. Additionally, compliance with stringent data protection regulations like GDPR and CCPA demands meticulous handling of customer data, adding complexity to the network management process. Furthermore, the proliferation of remote work has amplified security concerns, requiring secure virtual private networks (VPNs) and encryption protocols to protect data transmitted over networks. The challenge lies in finding a delicate balance between facilitating seamless data flow for operational efficiency and implementing stringent security protocols to prevent unauthorized access and data breaches. Enterprises are increasingly investing in advanced firewalls, intrusion detection systems, and encryption technologies to fortify their networks. The pressure to maintain customer trust and adhere to legal frameworks intensifies the demand for innovative solutions in the Global Enterprise Network Infrastructure Market, with businesses actively seeking comprehensive, adaptive security measures that can safeguard their digital assets while enabling efficient communication and collaboration within their network environments.

Scalability and Flexibility

Scalability and flexibility present notable challenges in the Global Enterprise Network Infrastructure Market. Enterprises often grapple with the need to expand their networks rapidly to accommodate growing data demands and emerging technologies. Traditional network infrastructures, rigid in design, struggle to cope with dynamic shifts in demand. Businesses face obstacles when trying to scale their networks seamlessly, leading to issues like congestion and latency during periods of high traffic. Moreover, the requirement for flexibility poses challenges in adapting to diverse technologies and operational needs. Enterprises seek network solutions that can swiftly adjust to changing demands without compromising efficiency. The challenge lies in finding network architectures that can effortlessly scale up to handle increased loads during peak times and scale down during periods of reduced demand. Flexibility is equally vital, ensuring networks can integrate various devices and applications without major overhauls. Consequently, the demand for agile, scalable solutions is high. Businesses are actively seeking network infrastructures that can grow organically with their operations, ensuring smooth expansion without disruptions. Providers offering adaptable, scalable, and flexible networking solutions are positioned favorably in the market, as enterprises increasingly prioritize infrastructures that can grow seamlessly with their evolving needs while ensuring optimal performance and efficiency.

Key Market Trends

Rise in Remote Work Culture and Digital Transformation

The Global Enterprise Network Infrastructure Market is experiencing remarkable growth propelled by the adoption of remote work culture and extensive digital transformation efforts. Businesses worldwide are rapidly embracing remote and hybrid work models, leading to a heightened demand for resilient, secure, and adaptable network infrastructure. This shift is not merely altering the operational landscape of companies but is also compelling substantial investments in cutting-edge networking solutions. These investments are geared towards establishing flawless communication channels, fostering collaboration, and efficiently managing data, irrespective of where employees are located. The surge in remote work culture necessitates networks that can seamlessly connect geographically dispersed teams, ensuring real-time interactions and collaborative workflows. As a result, businesses are turning to advanced network technologies to not only accommodate the evolving needs of their remote workforce but also to bolster their overall operational efficiency. This paradigm shift is steering the Enterprise Network Infrastructure Market towards innovations that prioritize flexibility, security, and scalability, aligning perfectly with the demands of the modern, digitally driven business environment.

Focus on Cybersecurity and Data Protection

The Enterprise Network Infrastructure Market is witnessing a heightened focus on network security, driven by rising apprehensions surrounding cybersecurity threats and data breaches. In response, companies are making substantial investments in cutting-edge cybersecurity solutions such as firewalls, intrusion detection systems, and encryption technologies. These investments are aimed at fortifying their networks and safeguarding sensitive data from the ever-evolving landscape of cyber threats. As cyber-attacks become increasingly sophisticated, businesses are prioritizing the establishment of secure network infrastructures to guarantee the confidentiality and integrity of their digital assets. This surge in security concerns is propelling the market towards a growing demand for robust networking solutions specifically designed with security as a paramount focus. The industry is witnessing a paradigm shift where ensuring the safety of digital information is no longer an option but a strategic imperative for businesses aiming to thrive in an era dominated by advanced and persistent cybersecurity threats.

Integration of Cloud Services and Hybrid Cloud Architectures

The Enterprise Network Infrastructure Market is undergoing a significant transformation

due to the integration of cloud services and the widespread adoption of hybrid cloud architectures. Businesses are progressively shifting their applications and data to cloud platforms, creating an escalating requirement for rapid, dependable, and protected network connections for accessing cloud resources. The emergence of hybrid cloud setups, amalgamating on-site infrastructure with cloud services, necessitates seamless network integration to facilitate efficient data exchange between these two environments. As companies harness the adaptable and scalable nature of cloud services, the need for network infrastructure capable of accommodating these integrations is surging. This shift signifies a fundamental change in how businesses structure their digital operations, emphasizing the essential role of robust and agile networking solutions in enabling the seamless flow of information between on-premises systems and cloud-based resources. The market is witnessing a heightened demand for networking technologies that can facilitate this integration flawlessly, ensuring businesses can leverage the benefits of cloud services without compromising on speed, reliability, or security. Enterprises are actively seeking innovative network infrastructure solutions that can effectively bridge the gap between their in-house operations and the expansive capabilities of the cloud, thereby optimizing their overall efficiency and adaptability in a rapidly evolving digital landscape.

Focus on Green Networking and Sustainability

The focus on green networking and sustainability is emerging as a significant trend in the Enterprise Network Infrastructure Market. With environmental consciousness on the rise, businesses are seeking energy-efficient networking solutions to reduce their carbon footprint. Manufacturers are developing energy-efficient networking equipment that consumes less power while maintaining optimal performance. Additionally, there's a growing emphasis on recycling electronic waste and adopting eco-friendly materials in networking hardware, aligning with the global push for sustainable business practices. As businesses prioritize environmental responsibility, the market for green networking solutions is expected to grow, promoting a greener and more sustainable future for network infrastructure technologies.

Segmental Insights

Technology Insights

The routers & switches segment led the market in 2022, accounting for over 40% share of the global revenue. Routers transfer data packets along the network and are placed in conjunction with two or more networks. Thus, routers and switches are essential parts

of the enterprise network, whereas switches connect devices on the network and employ packet switching to exchange data. The continuously increasing number of enterprise users and advanced broadband infrastructure are expected to drive this segment. Thus, demand for the router and switch segment is contributing to the market revenue. For instance, in July 2021, Edgecore Networks Corporation, which delivers wireless and wired networking solutions and products, launched an aggregation router solution for the following generation of service provider infrastructures. The AS7926-40XKFB 100G aggregation router allows users to upgrade their network infrastructure and address the challenges of 5G deployment and traffic growth from the network edge to the core.

The enterprise telephony segment is expected to showcase lucrative growth over the forecast period. Enterprise telephony is the transmission of voice, fax, and other information via an electronic medium with geographic business expansions across the globe by SMEs and large enterprises. Enterprise telephony ensures the smooth flow of communication and a socialized environment among employees from all industries. The adoption of enterprise telephony solutions is increasing to support the communication requirement of the enterprise. Thus, this segment contributes to the growth rate of the segment.

Industry Insights

The information technology & telecommunications segment dominated the market and accounted for more than 19% share of the global revenue in 2022. The startling increase in data traffic is projected to accelerate the expansion of IT and telecom infrastructure. Also, IT and telecom companies have been forced to build a robust IT and telecom infrastructure due to expanding smartphone penetration in rural regions and rising digital literacy, particularly in emerging and developing nations like China and India. An increasing number of mobile workers demand access to every networked and internet-based service using the most recent PC tablets, cellphones, and laptop PCs from anywhere.

The healthcare segment is anticipated to register the highest CAGR over the forecast period. Citizens are increasingly concerned about their health as public awareness of health issues grows. Healthcare institutions and businesses actively monitor and track their patients' health histories to provide patients with better health treatments and services. As a result, healthcare organizations and businesses are embracing digital platforms and utilizing enterprise networks for information sharing and collaboration. This will improve consumer support for their brand. Owing to this, businesses and

health institutions are investing in enterprise network infrastructure. Cybercriminals increasingly target healthcare organizations due to the sensitive nature of the data they handle.

Enterprise Size Insights

The large enterprises segment led the market in 2022, accounting for over 71% share of the global revenue. Large enterprises include enterprises with revenues in billions and more than 1000 employees. Large enterprises increasingly invest in network security to protect themselves from cyber dangers. This requires installing intrusion detection and prevention systems, network segmentation, and multi-factor authentication. Major corporations are beginning to investigate the possibility of 5G networking, which provides faster speeds and lower latency than earlier generations of wireless technology. For instance, in November 2022, a digital infrastructure company, Equinix, Inc, expanded its international business exchange sites. The company has invested more than USD 1 billion in the digital infrastructure of the U.K.

The SMEs segment is predicted to foresee significant growth in the coming years. These enterprises have less than a billion in revenue and less than 1000 employees. The rising growth of this market is due to an increasing number of small and medium-sized businesses focusing on expansion, which encourages them to employ numerous innovative and novel solutions. These companies need more funding and more resources. On the other hand, governments support SMEs by offering tax benefits and other services.

Regional Insights

North America dominated the market and accounted for over 35% share of the global revenue in 2022, owing to the early and rapid adoption of advanced technologies across regional multinational companies. The emerging adoption of the work-from-home process is augmenting the growth of routers and switches, which is expected to expand and drive the growth of enterprise network infrastructure in North America. Demand for wireless access points also draws attention to business enterprises transforming their business infrastructure. For instance, in February 2022, the U.S. Department of Energy (DOE) announced USD 6 million in funding to advance 5G wireless networking for science applications for five research and development projects. The prominent evolution of enterprise network infrastructure has a wide range of technology and practices. The development involves integrating various software and hardware components, including routers, switches, firewalls, and other network devices.

Moreover, the emerging use of cloud computing is augmenting market growth.

The Asia Pacific region is anticipated to witness significant growth in the enterprise network infrastructure owing to the presence of developing economies such as China, Japan India. The increased demand for high-bandwidth applications has prompted businesses to adopt advanced enterprise networking solutions to address current bandwidth shortage issues. Even in post-pandemic times, laptops, cellphones, and tablets have become more popular due to trends like BYOD (Bring Your Own Device), which is expected to drive the utilization of these devices in the region. Migration from rural to urban areas has increased megacities in Asia-Pacific. It is also driving the need for the government and public sector to digitalize and expand the solutions that address urban challenges and improve the quality of life for citizens.

Key Market Players

Cisco Systems Inc.

Juniper Networks Inc.

Arista Networks Inc.

Huawei Technologies Co. Ltd.

Nokia Corporation

Hewlett Packard Enterprise Development LP

Dell Technologies Inc.

Extreme Networks Inc.

F5 Networks Inc.

Palo Alto Networks Inc.

Fortinet Inc.

Check Point Software Technologies Ltd.

Citrix Systems Inc.

Riverbed Technology Inc.

Report Scope:

In this report, the Global Enterprise Network Infrastructure Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Enterprise Network Infrastructure Market, By Charger Technology:

Routers & Switches

Storage Area Network

Infrastructure Firewalls

Wireless LAN

Enterprise Telephony

Enterprise Network Infrastructure Market, By Industry:

Healthcare

Retail and eCommerce

Banking, Financial Services, & Insurance

Government & Defense

Information Technology & Telecommunications

Manufacturing

Others

Enterprise Network Infrastructure Market, By Enterprise Size:

SMEs

Large Enterprises

Enterprise Network Infrastructure Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Enterprise Network Infrastructure Market.

Available Customizations:

Global Enterprise Network Infrastructure market report with the given market data, Tech

Enterprise Network Infrastructure Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Seg...

Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Detailed analysis and profiling of additional market players (up to five).

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