MARAVEDIS
Wireless Infrastructure Analysts

Report

TIP Open Wi-Fi: Reality Check and Forecasts

2024 – 2029

Reliable, Independent, Affordable Research

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A report without primary research—i.e., consisting of interviews with industry participants and experts—would not be worth much. We want to thank all the following individuals for generously sharing their insights and time with me. A special thanks to Lauren de la Fuente, Founder and Strategic Advisor at Pearl Street Marketing, for facilitating interviews and to Marcel Chenier, CTO and Co-Founder at NetExperience, who explains the technology stack like no other.

1. Jack Raynor, Co-Chair OpenLAN and OpenWiFi project groups at Telecom Infra Project (TIP)
2. Cory Douglas, CEO at Pavlov Media
3. Eran Dor, VP of Products at Pavlov Media
4. Marcel Chenier, CTO and Co-Founder at NetExperience
5. Huw Rees, VP of Business Development at NetExperience
6. Robert Grosz, President & Chief Operating Officer at WorldView
7. Frank Lai, VP of Business Development - Head of OpenWiFi Division at Actiontec
8. Steve Martin, CEO and Co-Founder at Shasta Cloud
9. Bhuvnesh Sachdeva, Sr. Vice President of Product Development at HFCL
10. Siddharth Singh , CEO and Co-Founder at Wavespot
11. Khetan Gajjar, Lead manager at TIP OpenWiFi
12. Irene Chen, Marketing Director at Edgecore Networks
13. Tony Stramandinoli, VP of Sales, Wireless BU at Edgecore Networks
14. Earl Lum, Founder at EJL Wireless (to discuss Open RAN)
15. Andy Davidson, Group CTO at Ask4

About the Author

Mr. Adlane Fellah is a veteran industry analyst and investor with 25 years of experience in the telecom sector. He has authored landmark reports on Wi-Fi, 5G, and technology trends in various industries, including residential, enterprise, and Industry 4.0. Fellah is a certified wireless network administrator (CWNA) and certified wireless technology specialist (CWTS). He also regularly serves as a judge for the Glomo Awards (GSMA), Fierce, Glotel, and WBA Awards. More at www.maravedis-bwa.com

About Maravedis

Maravedis is a boutique wireless infrastructure analyst firm founded in 2002 that focuses on broadband wireless technologies with a particular focus on managed Wi-Fi and private cellular networks. Maravedis also analyzes industry spectrum regulations and operator trends. Its mission is to research, analyze, and provide guidance on the role of wireless technologies in digital transformation.

Why buy this report?

In the age of Google search and ChatGPT, why would you invest money in purchasing a market report?

A veteran wireless industry analyst with decades of experience (Adlane Fellah) performed the research and wrote this report. It results from an intensive research process involving one-on-one

interviews with industry experts, as well as a thorough review of available senior living statistics and literature. The report also includes unique market projections based on hard data from multiple sources and assumptions built over many interviews with leading players in the market.

Questions answered by this report

- Should you invest in OpenWiFi?
- What are the risks and benefits involved with OpenWiFi?
- How many access points have been deployed thus far?
- Who are the Tier 1 service providers testing OpenWiFi?
- Who are the service providers most likely to adopt OpenWiFi?
- What segments and regions are most promising for OpenWiFi?
- Who are the most serious technology players?
- Why did Pavlov acquire NetExperience?
- What are the latest essential features of TIP OpenWiFI?
- What new features are expected next year (2025)?
- What is the total addressable market in 2024-2029?
- Will OpenWiFi go through the same challenges as Open RAN?
- What does Maravedis think of the overall potential for OpenWiFi?

Who should buy the report?

Service providers: Decide whether (or not) to adopt OpenWiFi, gain an independent perspective about this technology, validate internal knowledge, and understand who is doing what.

Solution providers: Decide whether (or not) to invest in OpenWiFi, gain an independent perspective about this technology, validate internal knowledge, and understand its market potential.

Other stakeholders: Gain an independent perspective about this technology, gather industry information quickly, validate internal research, obtain a holistic market view, and use objective data to make informed decisions.

Important Note

This report provides a cost-effective look at the senior living ecosystem. However, if you like its content and want to explore this segment further, contact us to discuss your custom research and consulting needs.

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Executive Summary

"Nobody gets fired for buying IBM" is a phrase anyone working in technology has encountered for the last twenty years. The same could be said about Cisco or HP-Aruba in the enterprise WLAN space. Yet Wi-Fi technology has evolved rapidly in the last two decades, spanning various generations of architectures and standards. The hardware disaggregation movement in the data center has now reached the network's edge with TIP OpenWiFi.

Using an analogy, we asked industry leaders we interviewed what sort of car Open WiFi would be equivalent to. Some answered Hyundai/Kia, others Tesla. Hyundai symbolizes a cost-effective car with few bells and whistles (or at least in its modest beginnings) that takes you from point A to point B. To others, OpenWiFi is equivalent to Tesla because it disrupts the traditional car industry and supports a whole movement of open software for its charging stations.

In our opinion, OpenWiFi is a decent car whose performance and value will improve as deployments generate the volumes required for continued R&D. Only commercial success will ensure the survival and eventual prosperity of its ecosystem of developers and hardware vendors. We do not think economics alone is the primary driver for adopting OpenWiFi. For many customers, OpenWiFi allows them to innovate and control their destiny in a volatile and uncertain Wi-Fi supply chain. Combining these two drivers—better economics and more user value—is necessary for a disruption to succeed.

OpenWiFi is only three years old, with two years spent on R&D. It is slowly making inroads into several markets, including multi-family, hospitality, and other sectors. Further, the introduction of OpenLAN switching will positively impact future deployments.

We see massive potential in price-sensitive markets such as India and among US and European MSPs eager to diversify their suppliers. To produce our market estimates, we listened and challenged the claims of everyone interviewed to separate wishful thinking from reality.

It was tempting to compare the sorry state of Open RAN and reach conclusions about what will occur with OpenWiFi. While there are similarities between the two initiatives, there are also considerable differences in the task's complexity and the market's needs. Macro cellular requirements do not change between countries and markets; Wi-Fi requirements do. OpenWiFi can find its place in market segments that are still dominated by a few large and traditional WLAN vendors.

However, OpenWiFi must overcome significant risks and uncertainties to fulfill its destiny. The first and most significant risk is that deployments are too slow to materialize, which

puts the entire ecosystem of suppliers at risk. The second risk is an offensive by well-funded (with exceptions) incumbent WLAN suppliers. By investing considerable R&D in improving their offering with superior AI engines, better performance, and more flexibility to customer-specific needs, OpenWiFi adoption is made much harder to justify for CIOs and CTOs. Another risk is that few OpenWiFi vendors have become the de-facto duopolies, thus limiting innovation and discouraging smaller players from entering the ecosystem.

As OpenWiFi becomes more mature and accepted, perhaps CIOs and CTOs will see it as a safe choice, and thus… "Nobody will get fired for buying OpenWiFi ".

The *TIP OpenWiFi* report is based on interviews with industry leaders and companies deploying OpenWiFi. It includes a detailed view of the latest OpenLAN switching offering, the state of the current deployments in each segment, a risk assessment, and various forecast scenarios for OpenWiFi access point markets for 2024-2029.