



**Hewlett Packard
Enterprise**

Wireless Connectivity in the Enterprise

WinnForum Global Perspectives on Spectrum
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A few words on HPE

HPE Networking

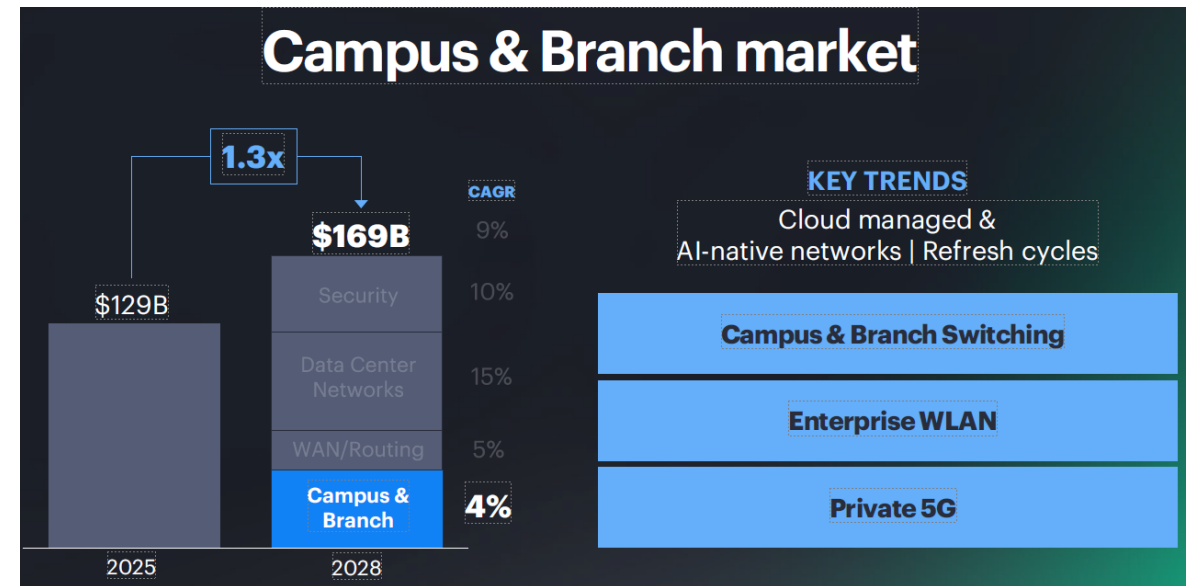
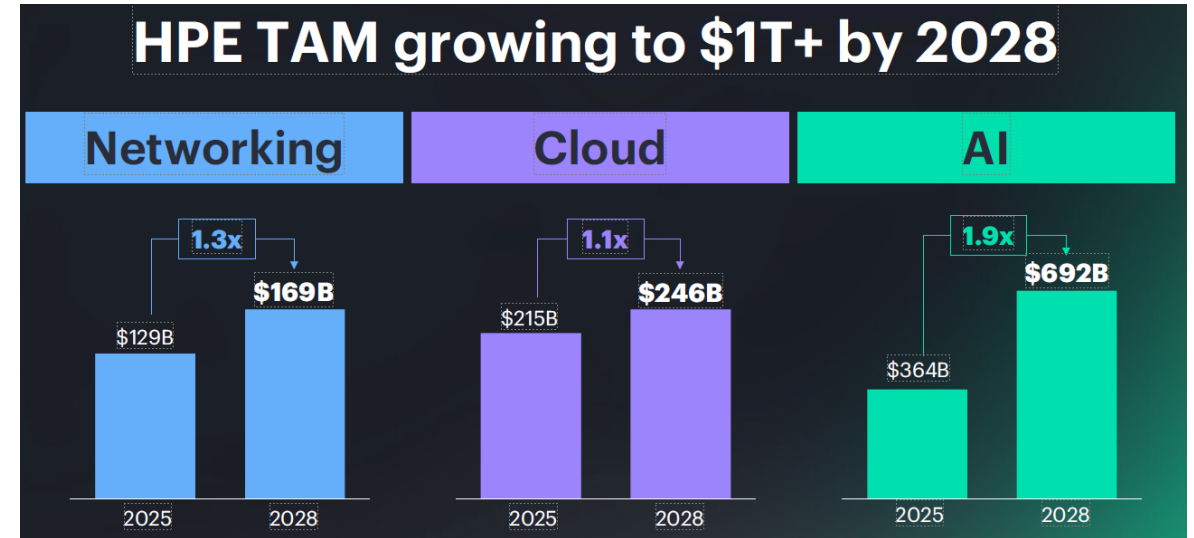
HPE aruba
networking

HPE JUNIPER
networking

HPE overall revenues (3Q2025): USD 9.1B

Enterprise WLAN market share:
21.2%

WLAN solution portfolio covering all bands, all locations, and all major use cases.



Wireless Broadband Connectivity in the Enterprise

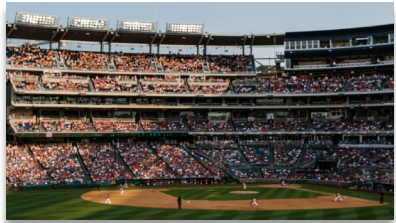
Private 5G: Low volumeHighgrowth

Spectrum: 3.5 / 4 GHz

Wider area coverage High-velocity mobility



Traffic segmentation



ChallengingRF environments



Publicsafety/ Tacticalcomms



Wi-Fi: High volumeStable growth

Spectrum: 2.4 / 5 / 6 GHz

Large public venues



Education



Healthcare



Manufacturing



Transportation



Hospitality



Logistics



Office

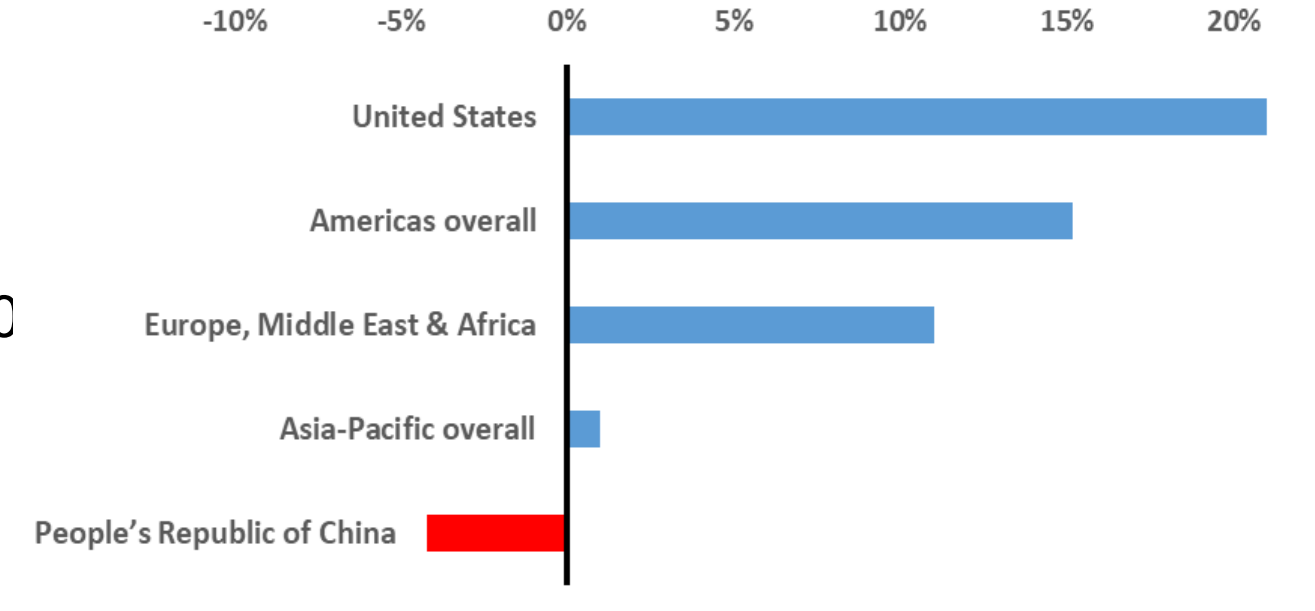


Complementary technologiesDifferent bands

Enterprise WLAN Market Status

Strong YoY growth in those enterprise WLAN markets where the 6 GHz band is available

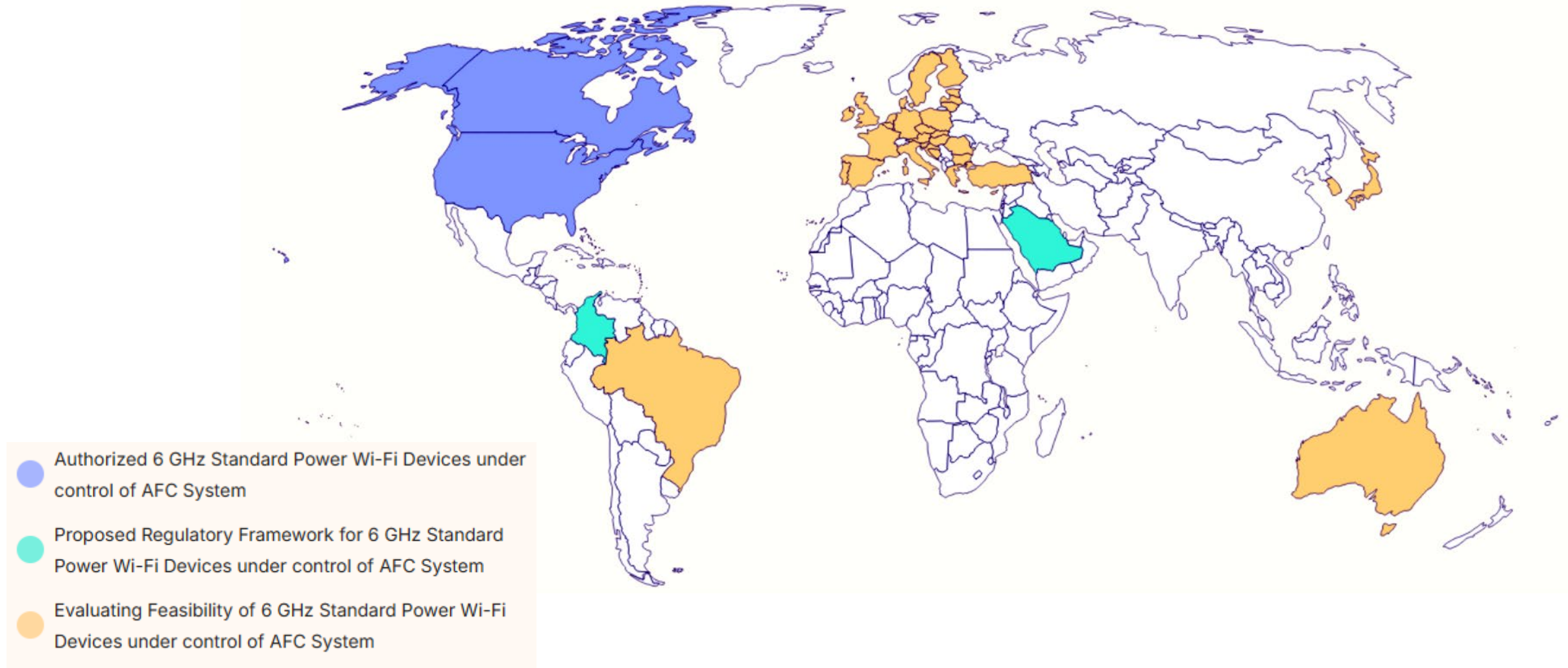
- United States : +21.0%
- Americas overall: +15.2%
- Europe, Middle East & Africa: 11.0%
- Asia-Pacific overall: +1.0%
- People's Republic of China: -4.2%



Source: IDC press release of 17 June 2025



Regulations Enabling 6 GHz Standard Power Wi-Fi



Source: Wi-Fi Alliance

Standard Power Wi-Fi with AFC deployments University of Notre Dame

- First higher education stadium to bring Wi-Fi 6E outdoors.
- 1,100 indoor and outdoor access points providing a large variety of services to up to 80,000 visitors.
- Services include ticketless entry, contactless concessions, augmented reality, real-time stats, and live video chat.
- Pilot P5G network deployed to potentially complement Wi-Fi in the future.



Current and future use of the 6 GHz band

- Utilization of the 6 GHz band is growing fast as more and more 6 GHz APs and client devices are entering the market.
- In enterprise settings, 6 GHz is now seen to carry more than 40% of total Wi-Fi traffic.
- Numerous large-scale projects in progress, particularly in the U.S. and KSA where the full 6 GHz band is available for Wi-Fi.
- Slow start in the consumer space in EMEA because at least in some countries, major operators (who happen to be also the biggest MNOs) are withholding modern Wi-Fi equipment from their customers.
- Share of 6 GHz Wi-Fi sales in the retail market is growing fast.
- Future availability of the Upper 6 GHz band for Wi-Fi in Europe still unclear due to massive political pressure from the mobile industry ('Big Telco') and instrumentalization of the 'European digital sovereignty' theme.
- A grand coalition of European stakeholders demands making the Upper 6 GHz band available for Wi-Fi use.
- An Opinion by the EU's Radio Spectrum Policy Group (RSPG) is scheduled for publication on November 12.

Thank you!



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