Industrial Ethernet switches (IES) perform a variety of crucial roles in today’s evolving network architectures. Along with gateways and routers, they provide critical infrastructure for connectivity-enabled business improvement strategies such as the Industrial Internet of Things (IIoT), Industrie 4.0 (I4.0), and IT/OT convergence. At the same time, they remain central to Industrial Ethernet’s continued displacement of legacy network alternatives.

IES suppliers face numerous strategic choices given the performance, integration, and competitive profiles of the new initiatives, coupled with ongoing segmentation of the market into distinct sectors – each with its own requirements and standards. IES suppliers are not without challenges, however. The prospects of greater competition from both IT and OT players in increasingly crowded industry segments is coupled with the need to keep up with major advancements in IE technology and standardization. The prospect of standard real-time Ethernet in the form of IEEE 802.1 TSN standardization, plus Software Defined Networking’s (SDN) promise in areas ranging from network management to network security, are two of the most prominent examples in this latter area.

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- How to satisfy IT customer demands while continuing to serve OT?
- The role of the cloud beyond integration
- How and when will IEEE 802.1 TSN impact the IES market, and to what extent?
- What is the incremental value proposition for SDN in network infrastructure?

This ARC research is available as Market Intelligence Workbook (Excel) and a comprehensive Market Outlook Study (PDF).