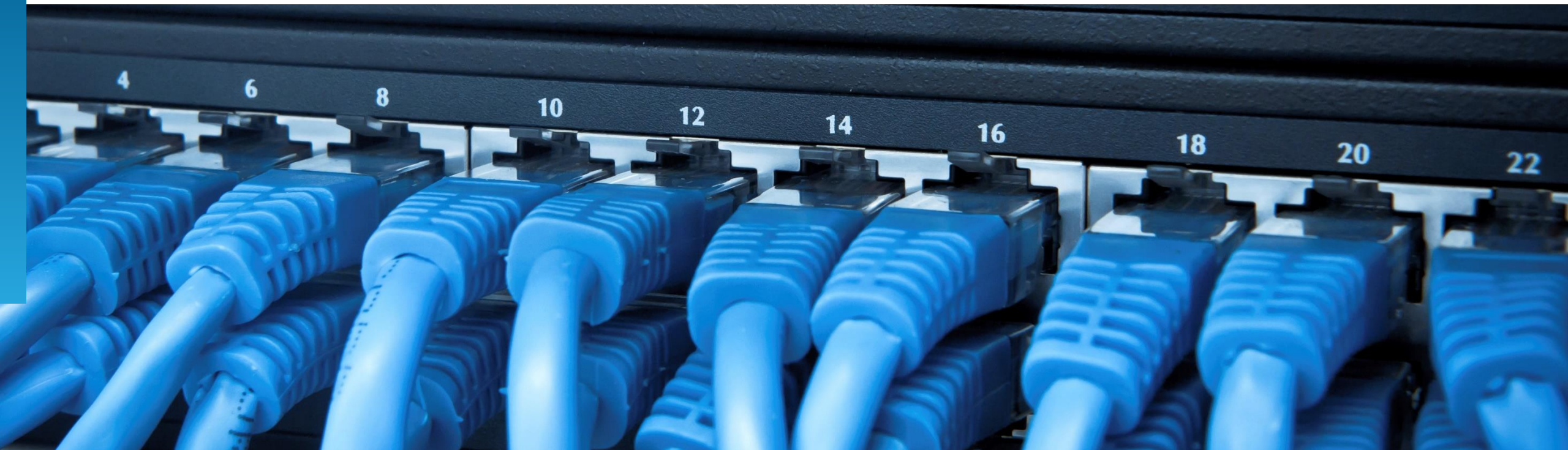


Secure Access Service Edge (SASE) Spotlight: Exploring the Top 10 SASE Technology Providers

December 2023: Complimentary Abstract / Table of Contents



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- ▶ Process Intelligence
- ▶ Process Orchestration
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- ▶ Retirement Technologies
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Background of the research

Technology providers for SASE

With the rise in digital transformation, enterprises have adopted more Software-as-a-Service (SaaS) applications, higher cloud-based workloads, and Work From Anywhere (WFA) policies. This has led to enterprises looking for reliable security services that can assist them in navigating the challenging modern enterprise IT and network landscape.

Technology providers have responded with Secure Access Service Edge (SASE) solutions, a unified cloud-based platform integrating multiple security functions and networking landscape providing better control, security, and visibility over users, traffic, and data. The SASE market is still in its early stages; however, it is expected to grow significantly in the coming years as more organizations adopt this new cloud-based product.

In this report, we present the current state of the market related to leading SASE product offerings in the market, enterprises expectations and challenges, and best practices for enterprises.

Additionally, this report provides a fact-pack view of the top 10 SASE technology providers.

Scope of this report



Geography
Global



Industry
All industries



Services
SASE product

Overview and abbreviated summary of key messages

This report highlights the growing interest in SASE adoption, emphasizing its pivotal role in addressing network and security challenges arising from cloud adoption and supporting digital transformation initiatives. The report provides an outlook on the global SASE market, key growth drivers, and enterprise concerns while adopting SASE, and offers insights into top SASE technology providers, drawing on Everest Group's comprehensive analysis.

Some of the findings in this report, among others, are:

Global SASE market overview

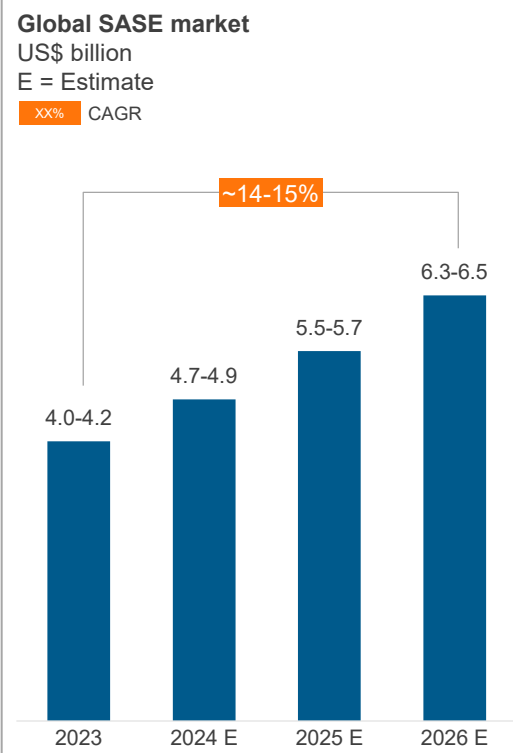
- The need for modern network and network security architecture is on the rise, with 67% of global enterprises indicating that more than 60% of the current workload is in the cloud while 57% of enterprises believe their WAN and security infrastructure is suboptimal for cloud deployments
- SASE demand is driven by digital transformation, distributed workforces, and enterprise focus on zero-trust architecture
- Enterprises are facing some challenges while adopting SASE such as Integration complexity and resource-intensive upgrades or replacements of existing infrastructure

Provider landscape and SASE offerings

- While technology providers offer integrated cloud-native SASE platforms, service providers deliver fully managed SASE solutions, leveraging technology providers' platforms
- The current macroeconomic conditions and ongoing vendor consolidation are steering enterprises away from multi-vendor SASE solutions, prompting a preference for singular vendor adoption
- The top 10 SASE technology providers offering SASE, a cloud-based security and network architecture to help organizations reduce network complexity and cybersecurity challenges

This study offers insights and analysis on the global SASE market, focusing on the demand drivers and provider landscape; below are three charts to illustrate the depth of the report

Enterprise demands driving SASE market | SASE provider landscape



Global SASE market size (2023)
US\$4.0-4.2 billion

SASE market CAGR (2023-26)
14-15%

- SASE market drivers**
- Continuous acceleration in digital transformation projects**
As digital transformation takes precedence, the widespread uptake of SaaS and cloud-based applications significantly amplifies the intricacies surrounding enterprise network security services.
 - Distributed workforce**
Companies are poised to sustain the shift from pre-pandemic business strategies, with a continued high number of employees anticipated to do WFA, reflecting a lasting change in work dynamics.
 - Investment toward zero-trust and AI-driven offerings**
Leading providers are strategically investing in advanced technologies such as zero-trust architecture, AI-powered threat detection, and behavior analytics, aiming to fortify and elevate their security defenses.
 - Increasingly complex threats**
Cyberattacks are becoming increasingly sophisticated in today's threat landscape, and enterprises must have the capability to detect and respond to threats quickly to minimize the impact of attacks.

Different types of providers involved in the current SASE market landscape

Technology providers	Service providers
<p>Technology providers offer the cloud-native SASE platform that integrates SD-WAN with security functions including ZTNA, SWG, CASB, and NGFW into one service.</p> <p>Illustrative players</p>	<p>Service providers offer fully managed SASE that brings an extensive network and cybersecurity services to deploy, build, manage, and maintain a comprehensive SASE solution offered by technology providers.</p> <p>Illustrative players</p>

Single vendor SASE vs multi-vendor SASE

Different types of SASE offerings from technology providers

Single-vendor SASE	Multi-vendor SASE
<ul style="list-style-type: none"> Organizations seeking integrated solutions from a single provider, which can offer a unified platform for networking and security-related services Offers ease of deployment, centralized control, and potential cost savings 	<ul style="list-style-type: none"> Offers flexibility and best-of-breed solutions, allowing organizations to choose different technology providers for specific networking and security components Provides specialized capabilities and customization options tailored to specific requirements
<p>Challenges: however, some concerns exist regarding vendor lock-in, limited choice, and potential dependency on a single provider</p>	<p>Challenges: managing multiple vendors and ensuring seamless integration between components can present challenges that must be addressed effectively</p>
<p>Why there is a shift toward single-vendor SASE?</p> <ul style="list-style-type: none"> The surge in adoption is particularly pronounced among small and mid-sized enterprises with fewer siloed branches For consistent performance and low latency across global Point of Presence (PoP), the streamlined management provided by a single-vendor SASE proves essential in optimizing the overall PoPs efficiency Both network technology providers and security technology providers expanding its respective portfolio to offer a complete SASE offerings 	

Research calendar

Cloud and Infrastructure, Cybersecurity, Network Services and 5G

Published Planned Current release

Reports title	Release date
Cyber without Perimeters: Starting Your Zero-trust Journey with Identity	May 2023
Cybersecurity Services State of the Market 2023: Cyber Secure to Cyber Resilient	June 2023
Cloud Adoption in Banking: Imperative Role of Hyperscalers	July 2023
Cloud Services PEAK Matrix® Assessment 2023 – North America	July 2023
Identity and Access Management (IAM) Services PEAK Matrix® Assessment 2023	August 2023
Navigating the Cloudscape: Unveiling Enterprise Adoption of Google Cloud Services	August 2023
Amazon Web Services (AWS) Services State of the Market 2023: Enabling Enterprise Transformation with AWS	August 2023
Network Transformation and Managed Services PEAK Matrix® Assessment – System Integrators (SIs) 2023	August 2023
Cloud Services PEAK Matrix® Assessment 2023 – Europe	September 2023
Microsoft Azure Services State of the Market 2023	September 2023
Cloud Services Provider Compendium 2023 – North America	October 2023
Cloud Services Provider Compendium 2023 – Europe	November 2023
Network Transformation and Managed Services Provider Compendium – System Integrators (SIs) 2023	November 2023
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