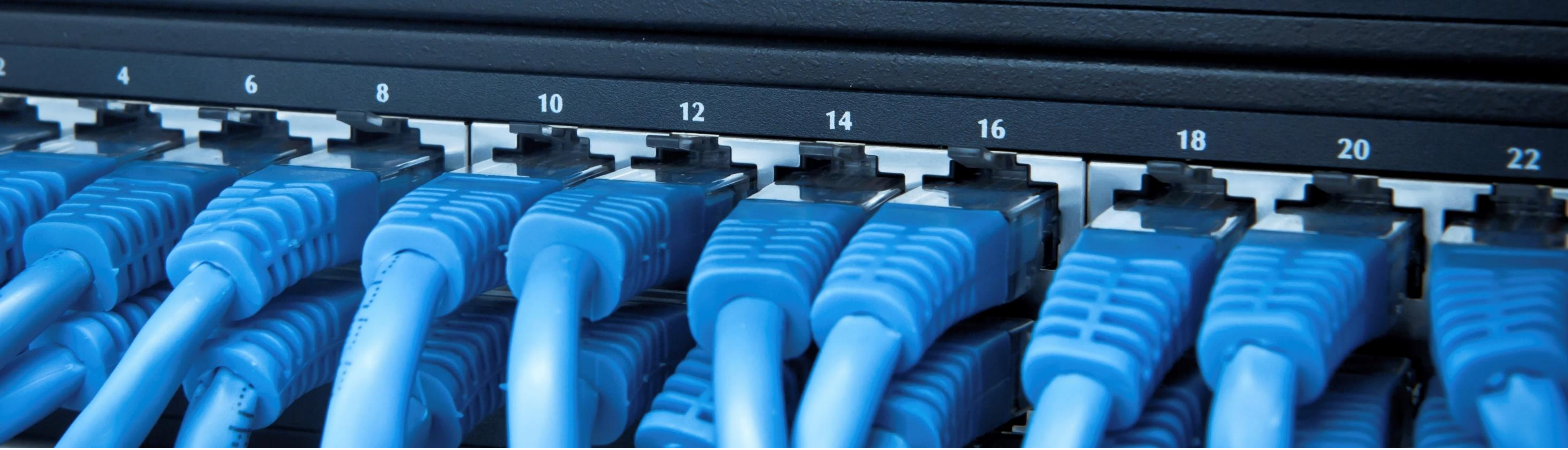

SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024

December 2024: Complimentary Abstract / Table of Contents

PEAK MATRIX®

Cloud and Infrastructure, Cybersecurity

Everest Group®

Our research offerings

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- Life Sciences Commercial Technologies
- Life Sciences Information Technology
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- Market Vista™
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- Process Orchestration
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- Retail and CPG
- Retirement Technologies
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- Rewards and Recognition
- SAP Services
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Introduction

The Secure Access Service Edge (SASE) services market is undergoing rapid evolution, reshaping the enterprise security and networking landscape. The widespread adoption of cloud, the rise of a global hybrid workforce, and the rise of zero-trust principles are accelerating the adoption of SASE services. This has led enterprises to prioritize the integration of network and security functions, enhance user experience, improve security posture, and simplify management. This new set of priorities is requiring SASE service providers to evolve. Leading service providers in the EMEA region are accelerating the development of their SASE offerings by enhancing internal capabilities, forming strategic technology partnerships, and creating proprietary tools and IPs. These efforts are underpinned by innovations in advanced technologies, including AI-driven threat detection, automation, and generative AI, aimed at enhancing the performance, reliability, and adaptability of SASE solutions.

In this research, we present an assessment and detailed profiles of 15 SASE providers featured on the SASE services for EMEA Enterprises PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for the calendar year 2024, interactions with leading SASE providers in EMEA, client reference checks, and an ongoing analysis of the SASE services market.

This report includes the profiles of the following 15 leading SASE providers featured on the SASE services for EMEA enterprises PEAK Matrix:

- **Leaders:** Accenture, HCLTech, NTT DATA, and Wipro
- **Major Contenders:** BT Group, Capgemini, Colt Technology Services, DXC Technology, IBM, Kyndryl, Tata Communications, and Telefonica
- **Aspirants:** Coevolve, Open Systems, and SonicWall

Scope of this report

Geography: EMEA

Providers: 15

Services: SASE services

Overview and abbreviated summary of key messages

In this report, we present the assessment and detailed profiles of 13 SASE services providers featured on the SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024. The assessment is based on Everest Group's annual RFI process for calendar year 2024, interactions with leading SASE service providers, client reference checks, and an ongoing analysis of the SASE services for EMEA enterprises market

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

Everest Group SASE Services for EMEA Enterprises PEAK Matrix® Assessment

This report includes the profiles of the following 15 SASE service providers featured on the SASE Services for EMEA Enterprises PEAK Matrix:

- **Leaders:** Accenture, HCLTech, NTT DATA, and Wipro
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- **Aspirants:** Coevolve, Open Systems, and SonicWall

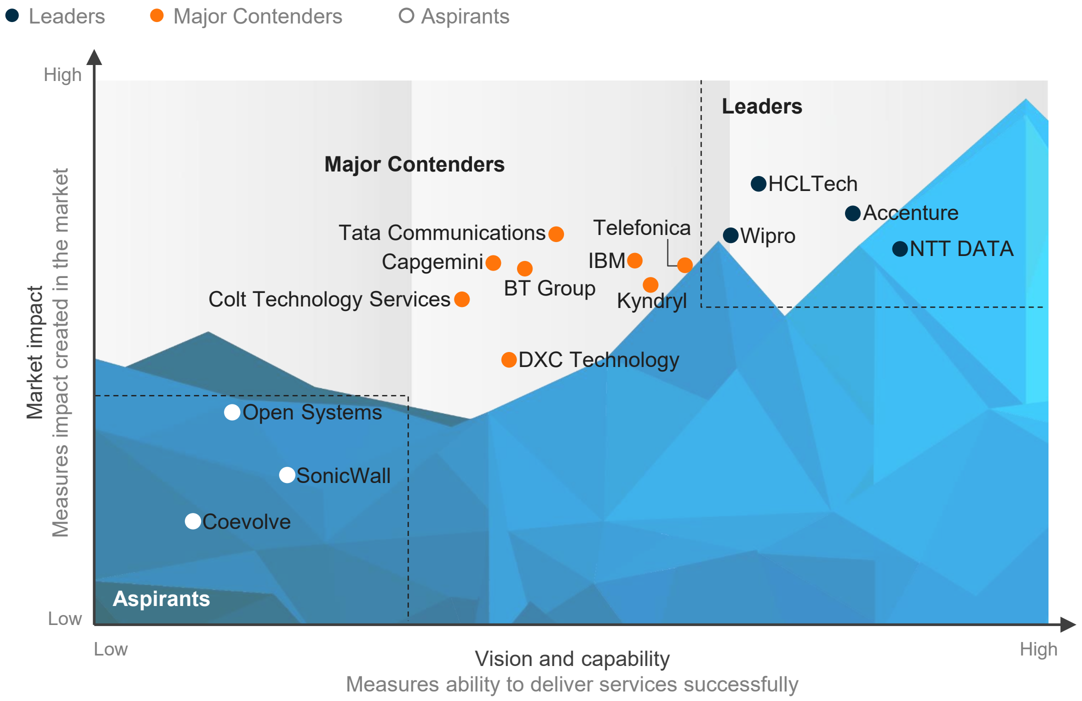
SASE Services provider characteristics

- Leaders have significant enterprise mindshare in the EMEA region because of their end-to-end SASE services portfolio and well-established market presence. Leaders are making substantial investments in next-generation technologies such as AI-driven network and security monitoring, AI-Ops based incident prediction and resolution, and gen AI- powered user interface to enhance overall performance, user experience, and reduce costs
- Major Contenders have developed substantial capabilities to deliver SASE services, though their service portfolios lack the balance and comprehensiveness seen among market leaders, particularly in terms of coverage across SASE segments, geographies, and industries. These providers are consistently creating internal IP and frameworks and expanding their service and technology partnership ecosystem to address existing capability gaps.
- Aspirants' SASE services business is still in the initial growth phase and currently does not serve large-scale or mega clients within the SASE services market. These providers are actively expanding their SASE services capabilities, leveraging both service and technology partnerships as well as developing internal IP and frameworks

This study offers 15 distinct chapters providing a deep dive into key aspects of SASE Services for EMEA Enterprises market; below are three charts to illustrate the depth of the report

Everest Group PEAK Matrix® Assessment 2024

Everest Group SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024[1]

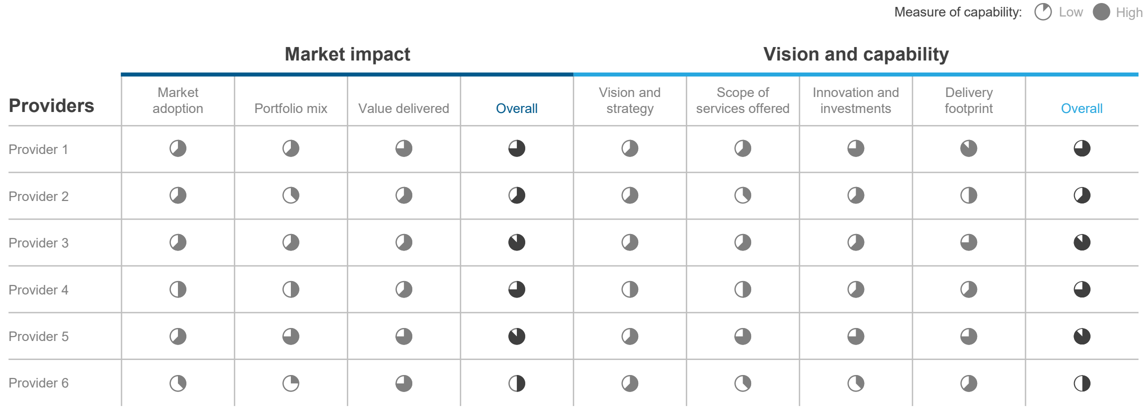


1 Assessments for Accenture, BT Group, Capgemini, Coevolve, Open Systems, and SonicWall excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with the buyers

Source: Everest Group (2024)

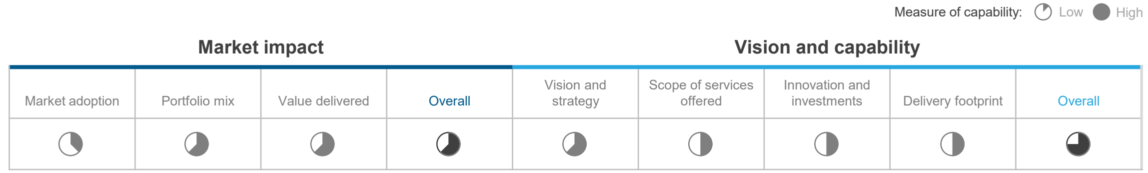
Capability assessment

Illustrative example



Everest Group's remarks on providers

Illustrative example



Strengths

- Enterprises in the EMEA region will gain significantly from the robust local support of Provider 1, which offers significant advantages compared to peers
- It emphasizes integrating SASE–as-a-Service and CASB capabilities into SASE, with industry-specific teams addressing vertical challenges and regulations

Limitations

- Provider 1 lags in industry-specific solutions and proprietary technologies compared to peers, which limits its ability to fulfill the unique requirements of various verticals
- Enterprises seeking AI-driven SASE delivery might not find Provider 1 suitable, as it has limited proof points and AI related investments

Research calendar

Cloud and Infrastructure

Published   Current release   Planned

Reports title	Release date
Secure Access Service Edge (SASE) Spotlight: Exploring the Top 10 SASE Technology Providers	December 2023
Accelerating Clients' Cloud Journeys: IT Services and Cloud Provider Partnerships to Drive Ecosystem Value	January 2024
Google Cloud Services Specialists PEAK Matrix® Assessment 2024	February 2024
Mainframe Services PEAK Matrix® Assessment 2024	April 2024
AWS Services Specialists PEAK Matrix® Assessment 2024	August 2024
FinOps Cloud Visibility Products PEAK Matrix® Assessment 2024	August 2024
Navigating AI Infrastructure: Backbone of the AI-Driven Era	September 2024
Mainframe Services State of the Market 2024	November 2024
Network Services State of the Market 2024	December 2024
SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024	December 2024
Cloud Services State of the Market 2024 – North America	Q4 2024
Cloud Services State of the Market 2024 – Europe	Q4 2024
AWS Services PEAK Matrix® Assessment 2024	Q4 2024
Microsoft Azure Services PEAK Matrix® Assessment 2024	Q4 2024
Google Cloud Services PEAK Matrix® Assessment 2024	Q4 2024

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