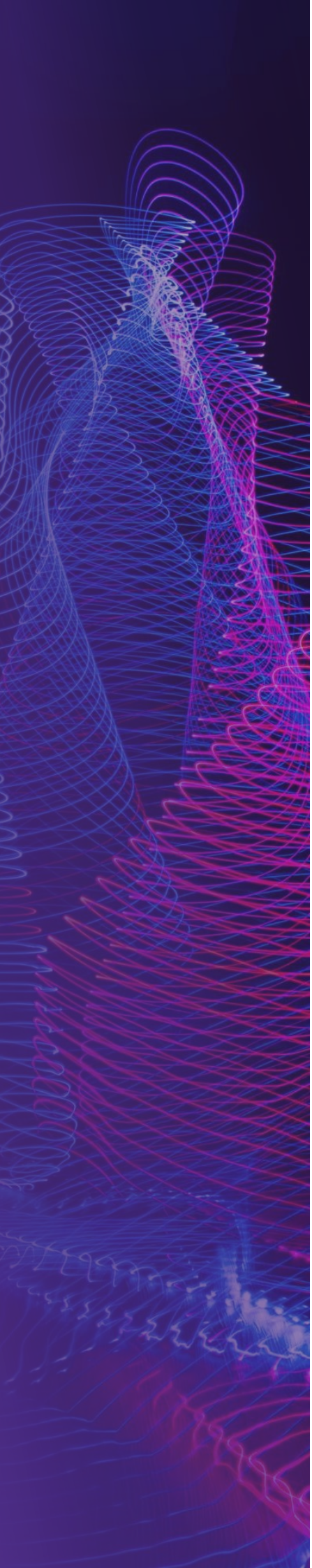
WAVESTONE

Surveying the state of SASE in 2022

What are the key trends discovered in 2022?



Introduction

Recent changes of work practices (accelerated by the COVID epidemic) have created a paradigm shift in the way network security should be delivered, enabled by **next generation SASE technology**. With a need to support increasingly distributed workforces and adjust to applications, data and other network resources becoming available in a decentralised manner.

This has enabled organisations to alleviate their troubles and expenses of running and maintaining on-premises IT infrastructure and experience operating efficiencies as well as increased flexibility. However, the traditional security architectures that exist in most established organisations, tend to use centralised entry points to control access to Internet (and Cloud delivered services). These are susceptible to poor application performance (due to added latency on paths to Internet delivered services) which pose potential performance and security challenges.

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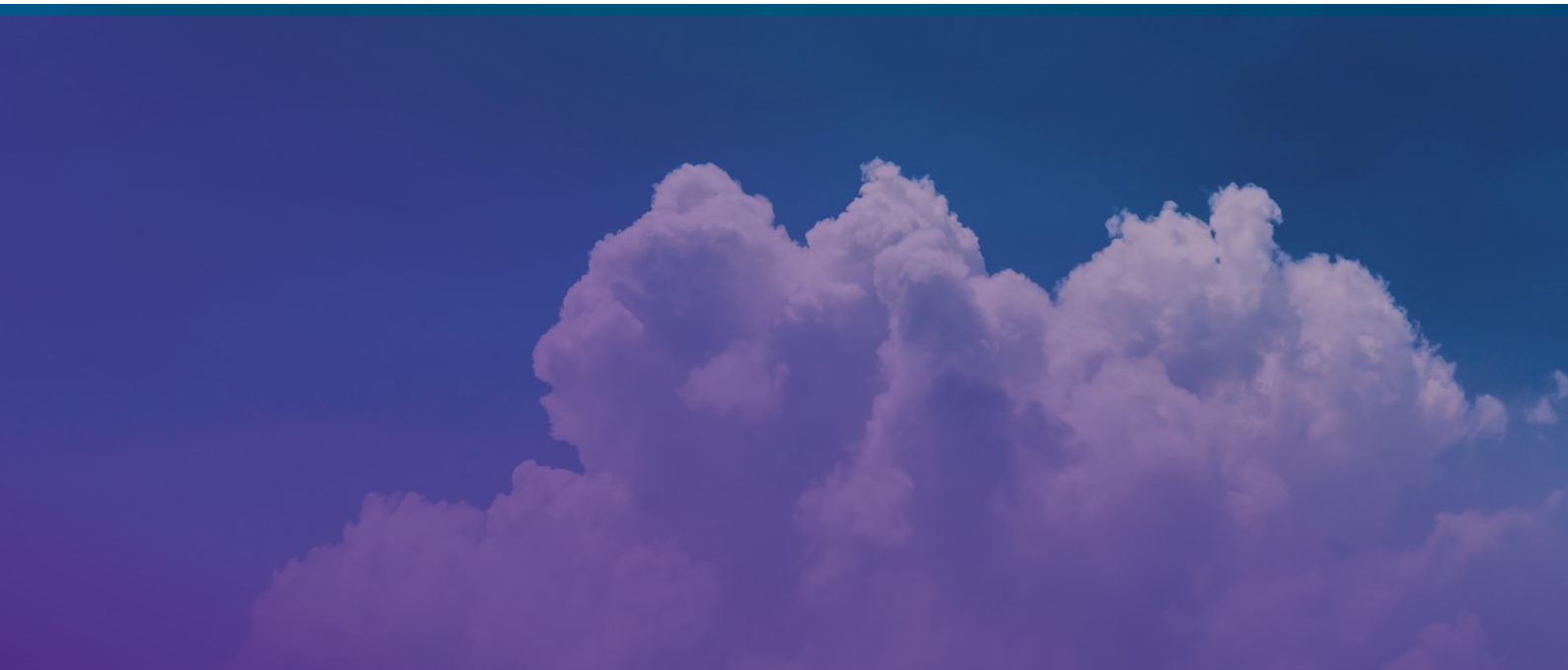
In this way, SASE supports the move to the cloud.

Today's challenge now centres around balancing business demands for access to internet and public Cloud delivered services whilst safeguarding integrity from a rising number of threats. Consequently, cybersecurity professionals need the ability to **swiftly adapt to new security needs** – keeping users, data, and devices safe from major threats and attacks. Therefore with the rise of decentralised IT environments and a shift to multi-cloud applications, traditional methods of connectivity must be re-considered along with the subsequent security capabilities.

This is what leads us to next-generation Secure Access Service Edge (SASE), an architectural framework designed to meet these challenges bringing both networking and security services into **one unified solution**. It aims to converge network and security in the form of cloud services, with a new design that no longer focuses on security at the enterprise datacentre level, but on the identity of the user, the device, and the systems with an **increase in the need for Zero-Trust** (single sign-on) user authentication capability.

Current state of the SASE industry

Also with SASE, businesses can scale up or down based on demand as it provides a low latency **usage-based service model** since traffic is no longer routed through a data centre thus improving productivity. Adoption of these elements also eliminates the costs associated with managing network hardware and other VPN gateways. Even though the SASE industry is still in its infancy, Gartner expects 40% of all organisations to adopt SASE by 2024 due to the benefits it provides.

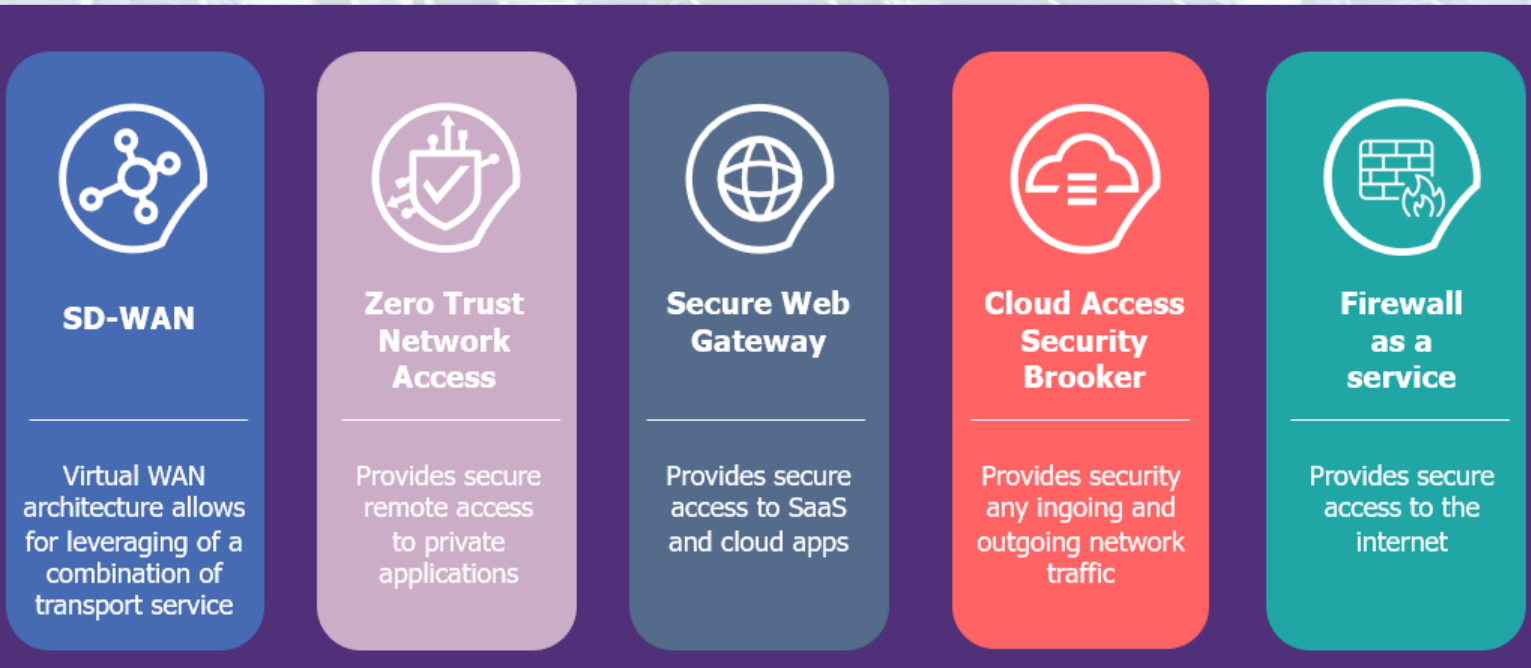


What does the SASE market currently offer?

In general, SASE capabilities are defined by **five key networking** and security components that should be implemented in unison as shown below. Many market players currently offering SASE solutions only provide customers with some of these 5 components and have chosen to partner with other companies to provide the components they cannot (yet) provide.

> *"By 2024, **30% of enterprises will adopt cloud delivered** SWG, CASB, ZTNA and branch office FWaaS capabilities from the same vendor, up from less than 5% in 2020"*
>
> *- Gartner roadmap for SASE convergence*

This unified solution enhances the performance of applications which are spread across individual users, varying locations, and cloud environments. In general, SASE capabilities are defined by five key networking and security components that should be implemented in unison. Many market players currently offering SASE solutions only provide customers with some of these 5 components and have chosen to partner with other companies to provide the components they cannot (yet) provide.



What does the SASE market currently offer?

Traditionally, for those organisations who use multiple SaaS applications daily and require access to internal administrative and operational systems, users would connect into a single location via their VPN which would then apply policies and licensing centrally. However, this significantly increased costs for businesses due to the inspection devices required to manage and monitor the traffic, whilst also degrading the user experience.

These issues can be addressed through Secure Web Gateways and Firewall as a Service suppliers which distribute the inspection devices to regional PoP locations and partner with SaaS vendors to apply security in the cloud environment known as Cloud Access Service Brokers (CASB).

Whereas SASE takes things one step further and allows users to connect into the corporate network (whilst leveraging the advantages of SD-WAN) as long as the user can verify their identity. As an approach, it distributes inspection checkpoints across regions which improves the efficiency of network resources whilst also reducing the latency.

Overall, SASE offers a **shared and central cloud-based toolset** that enhances visibility and control across and can then be managed and coordinated in the cloud with policy-setting dispersed along the network edge.

What does the SASE Market Look like today?

It's evident that SASE represents the future of organisations networks and cyber security, set to become the main-stream security solution for businesses. As a result, we can see that numerous vendors are beginning to enter the market with their own SASE or SASE-like services. However, SASE means different things to different people, and being such a new offering there is still confusion shrouding the topic, with varying criteria to compare SASE offerings against. With so many emerging solutions, it can unclear for organisations which service fits best.

Wavestone has assessed a number of the key players within the SASE market. Palo Alto provides rapid deployment and advanced ZTNA with continuous verification, VMware has strong integration with third party solutions, and Versa Networks, has multi-tenant architecture scalable to over 1000 sites and full virtualisation using a single OS. These are a few of the potential solutions that could be suitable for your organisation. **Wavestone's detailed market analysis and research**, can help guide your organisation to a solution that suits you.

It is worth noting, within the market, a divide has been made between those that aim to become a one stop SASE solution and those that lean towards providing **Security Service Edge (SSE)** and relying upon partnerships with vendors to provide their WAN edge solutions. However, for some organisations it can be uncompelling to rely on all functions to be provided by a single stack. SSE partnered with best of breed SD-WAN can provide a viable, versatile model that ensures your organisation gets a solution, tailored for you.

*"With Markets & Markets predicting the global SASE market size is projected to grow from **$1.2 billion in 2021 to $4.1 billion by 2026**. Such growth is driven by the increasing preference for remote working, coupled with the rising need for a unified network security architecture with the capabilities of SD-WAN, FWaaS, SWG, CASB, and ZTNA solutions"*

What do these offerings mean to clients?

Implications and perceptions to customers

Replacement of traditional firewalls and networking methods, not only introduces innovative solutions for businesses but also new risks & concerns. For example, decision-makers are worried about where to start, or the shift from a predominantly CAPEX model to an OPEX model, or disruptions to their fundamental systems. Plus, the organisations that have not yet embraced SASE or do not plan to, are either focused on other organisational goals, or do not have the **budget** to invest in modern technology. Despite the benefits of SASE, enterprises wanting to adopt and execute SASE technologies in a hybrid cloud environment must address potential challenges outside of the pure technology choice, such as:

1. **Choosing the right vendor** to support the intended results of their business
2. Creating the **necessary organisational transformation** and aligning responsibilities for transition
3. **Organisational and cultural ramifications** of combining networking and security into a single entity
4. **Evaluating their approach to adoption** based on the current organisational structure
5. Available **funding options** and where they will obtain their funding

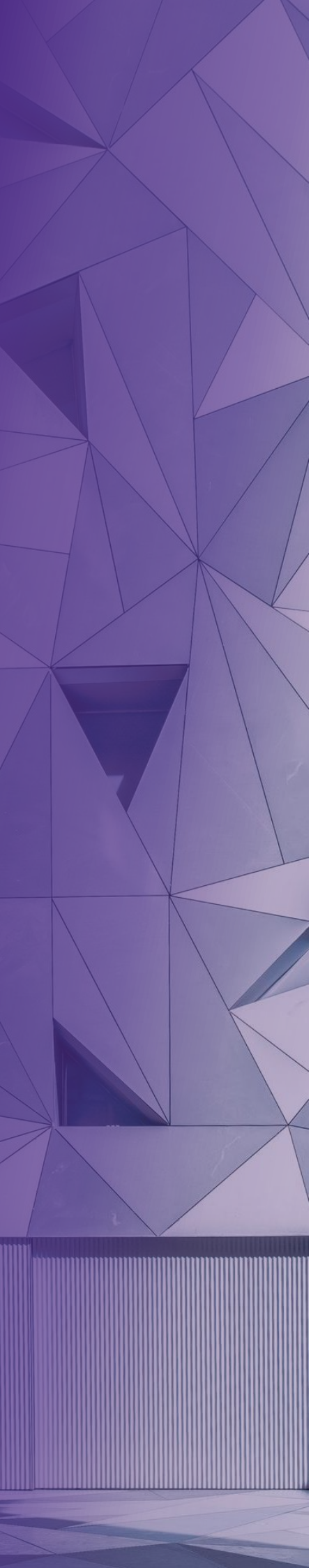
Apart from the challenges above, businesses will also have to overcome some mistrust between different IT groups and will have to set their differences aside for SASE to succeed. To guarantee that these groups work together productively, executive management will need to set new, more unified objectives and incentives.

Security has been the primary reason for enterprises adopting the SASE concept

In a survey of Trusted Advisors conducted by AVANT Research & Analytics; customers have expressed an interest in SASE because of its security features. Enhanced security of devices and applications were cited by two-thirds of customers (68%) as the most important aspect, followed by easier management (14%). However, according to AVANT's study, SASE conversion would not happen all at once in most circumstances. Nine out of ten customers intend to **gradually adopt a SASE approach rather than adopting a single engagement strategy** depending on their needs and existing architecture.

But what are the current priorities for customers when adopting SASE?

SASE being fully cloud-based allows easier integration of on-premises infrastructure enabling businesses to slowly **migrate to the cloud**. This provides decision-makers the time to develop a strategy to approach the transition. Moreover, the flexibility of SASE licensing enables decision makers to start with a smaller investment with scope to scale for growth.

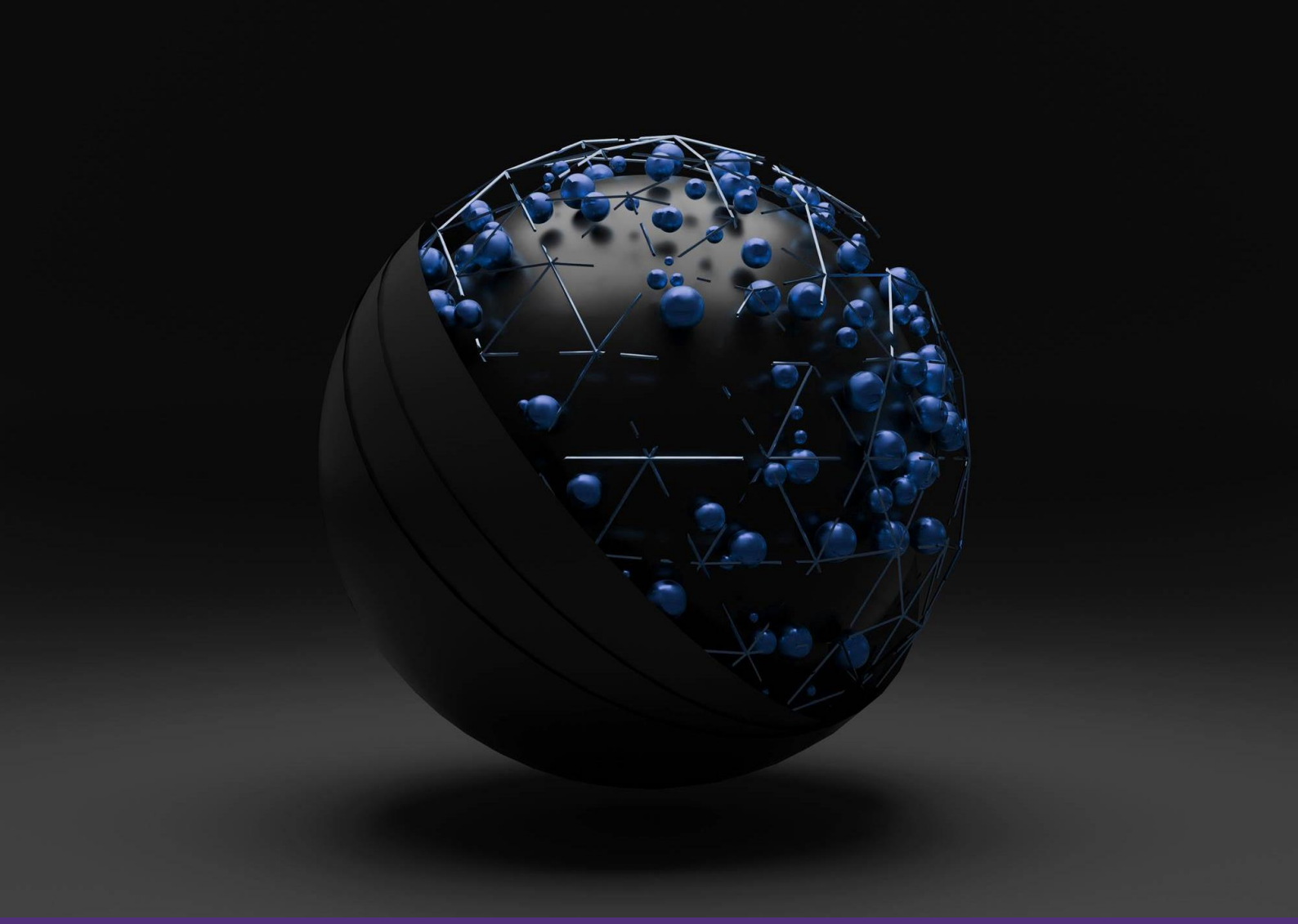


What can Wavestone do for you?

There are several offerings for SASE by vendors, but are all these solutions ideal for all businesses? Well, there is no one-size-fits-all approach for adopting SASE. Businesses need to consider whether the solutions on the market will add value or complexity. Identifying the key challenges in their industry and taking a phased, step-by-step approach is the ideal way to **embark on a SASE journey**.

Having said this, it is certainly worth considering the benefits of bringing both network and security needs together thus preparing the business for the future. Existing approaches are being challenged by the rise in complexity, a shortage of trained IT personnel, and the need for dynamic scaling. Implementing a SASE solution should not be limited to assessing the needs of today, but it must evolve to the dynamic network changes and business requirements of the future. This is **highly beneficial for small and medium sized operations** as such flexibility allows SASE to be adopted in a simple and cost-effective manner.

With the mystique revolving around SASE, the road to implementation can be daunting. With no clear option which encompasses every need, the solution must be able to adapt to an ever-changing market. From sourcing to implementation, with a lack of guidance the path can be unclear. That is not to say, there isn't ways to navigate the fog; **Wavestone's experience and expert knowledge can guide you on your SASE journey, the positive way.**



Wavestone is a leading independent, global technology and management consultancy, helping our clients master their key digital, competitive, and environmental challenges. We draw on a strength of resource and expertise of over 4,000 consultants, deployed throughout the world. Wavestone is also marked by our style, which we call **“The Positive Way.”**

In the UK, our client focused approach allows us to bring deep business and technology expertise to add value to an organisation’s agenda. We support our clients across operational resilience, cybersecurity and technology advisory topics.