Approaches to SASE: 11 vendor profiles

Tom Rebbeck

About this report

This report assesses the approach that 11 different vendors are taking to secure-access service edge (SASE) or the combination of SD-WAN and various security services.

The report also provides recommendations for networking and security vendors that have either launched SASE or are considering doing so.

It is based on several sources:

- interviews with the vendors profiled in this report
- interviews with telecoms operators[1]
- secondary sources, such as analyst day presentations.

CASE STUDIES

- Cato Networks
- Check Point
- Cisco
- Fortinet
- Netskope
- Palo Alto Networks
- Perimeter 81
- Sophos
- Versa Networks
- VMware
- Zscaler

KEY QUESTIONS ANSWERED IN THIS REPORT

- Which approaches are vendors taking to SASE?
- How have SASE solutions been developed (for example, acquisition)?
- What are the strengths and weaknesses of different SASE solutions?
- What are the key differentiators of each SASE vendor?
- Which routes to market are the SASE vendors using and which telecoms operators have they partnered with?

WHO SHOULD READ THIS REPORT

- This report will be of interest to strategy, product and market teams within vendors, or potential vendors, of SD-WAN and SASE solutions.
- It will also be of interest to anyone involved in SD-WAN and SASE in telecoms operators, systems integrators, managed service providers and other IT or security vendors

[1] For more information, see Analysys Mason's *Approaches to SASE: 12 operator case studies*.

Fortinet: analysis

Fortinet has built up a strong reputation for its SD-WAN offering. It has a large base of mostly small firms and a wide range of channel partners. Its SASE offering is relatively new, but should help Fortinet to further improve its reputation.

The strategy of developing solutions in-house means that it does not have the problems associated with integrating multiple solutions that affect its competitors and reduce the user-friendliness of their products. Fortinet has a reputation for products that are easy to use and for being easy to do business with. This can also be seen with the flexible deployment options offered by Fortinet for SASE (for example, in relation to the hosting of gateways).

This flexible approach has helped it to win a large selection of channel partners, many outside North America. It is notable that Fortinet is less dependent on North America for revenue than most other security vendors.

There are downsides to its approach. It has been slower to launch SASE features than its more acquisitive competitors, and its global network of gateways is small, although rapidly growing. Larger firms may not look to Fortinet or will only use Fortinet for its well-established components (such as firewalls) and may rely on other vendors for newer components (ZTNA, CASB).

Figure 14: Key strengths and weaknesses

Strength	Description
Reputation	Fortinet is very well liked by channel partners, especially as a solution for small and medium-sized firms.[1]
Single OS	Fortinet's solution was largely built in-house with different elements created on top of the same OS; it does not suffer from the integration issues of some competitors.
Channel partners	Fortinet has a large and growing base of channel partners.
Weakness	**Description**
Global network	Its global network presence is still relatively weak, with 14–15 PoPs (compared to 80+ for some competitors).
Relatively new solution	Fortinet has only recently launched some of the key SASE components, such as ZTNA. These do not yet have the same level of market traction as its more established SD-WAN products.
Reach in mid/large enterprises	Fortinet's main market is smaller firms. It does not have the same position with medium-sized to large firms.

Source: Analysys Mason

[1] For more information, see Analysys Mason's *Telecoms operators rated Fortinet as the best security vendor for the SMB market*.

Contents

Executive summary

Analysis

Case studies

Appendix

About the author and Analysys Mason

About the author

Tom Rebbeck (Partner) leads Analysys Mason's Operator Business Services and IoT research practice drawing on more than 20 years of experience in the telecoms sector. He is based in our London office, but works for clients worldwide. Tom is a specialist on the Internet of Things (IoT) and other enterprise services and has written widely on the role for operators as telecoms markets develop. As well as published research, he has worked on projects for a range of clients – including operators, regulators, industry bodies and vendors. Many of these projects have been supported by original research, such as expert interviews and customer surveys.

Global leaders in TMT management consulting

analysysmason.com/what-we-do

Analysys Mason is the world's leading management consultancy focused on TMT, a critical enabler of economic, environmental and social transformation.

We bring together unparalleled commercial and technical understanding to deliver bespoke consultancy on strategy, transaction support, transformation, regulation and policy, further strengthened by globally respected research.

Our clients value our advice which combines deep domain knowledge with global reach and local insight into markets to help them achieve meaningful business results.

We are committed to our clients, employees and communities – contributing to a world where technology delivers for all.

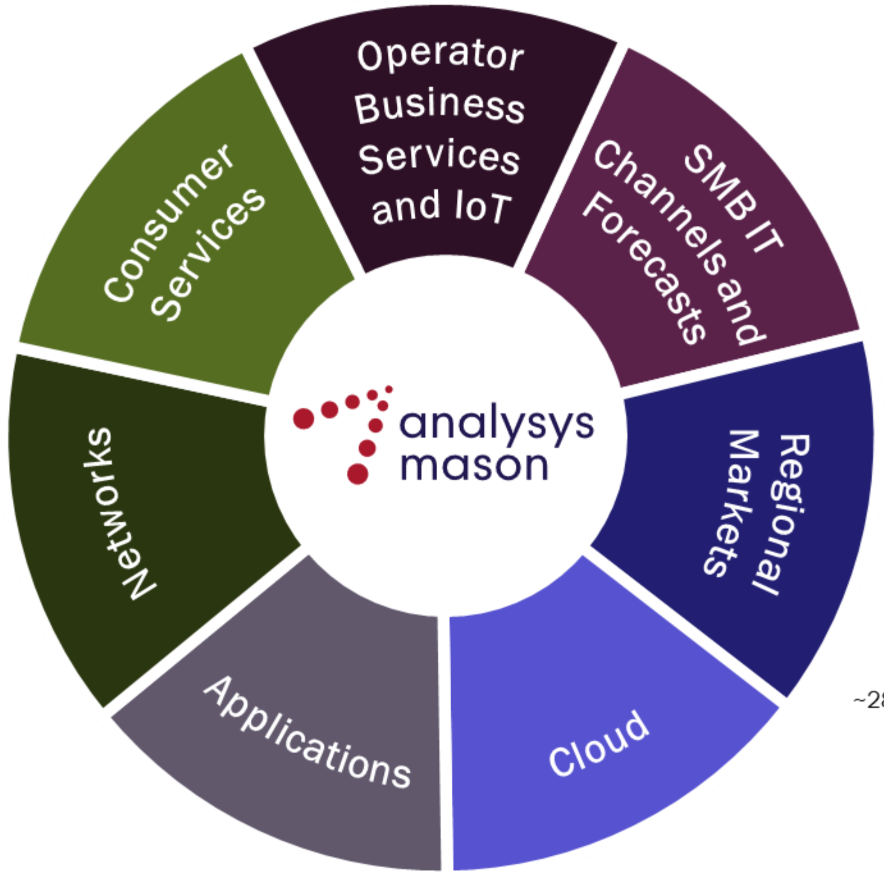
Our research programmes

Consumer Services programmes
Fixed Broadband Services
Mobile Services
Fixed–Mobile Convergence
Smart Devices
Future Comms
Video, Gaming and Entertainment
Digital Services

Networks programmes
Next-Generation Wireless Networks
Wireless Infrastructure Strategies
Fibre Infrastructure Strategies
Operator Investment Strategies
Telecoms Strategy and Forecast

Applications programmes
Network Automation and Orchestration
Customer Engagement
Monetisation Platforms
Digital Experience
Automated Assurance
Service Design and Orchestration
Telecoms Software Market Shares

Cloud programmes
Cloud Infrastructure Strategies
Data, AI and Development Platforms
Edge and Media Platforms



analysysmason.com/what-we-do/practices/research

Operator Business Services and IoT programmes
Enterprise Services
SME Services
IoT Services
Private Networks

SMB IT Channels and Forecasts programmes
Cyber Security

Regional Markets programmes
Global Telecoms Data and Financial KPIs
Americas
Asia–Pacific
Middle East and Africa
European Core Forecasts
European Telecoms Market Matrix
European Country Reports

DataHub
~2800 forecast and 280+ historical metrics
Regional results and worldwide totals
Operator historical data

Our areas of expertise

Strategy

Corporate growth strategy

Business unit strategy

Infrastructure strategy

Regulation and policy

Network and platform

Public sector broadband intervention

Accelerating digital transformation of society

Price controls and cost modelling

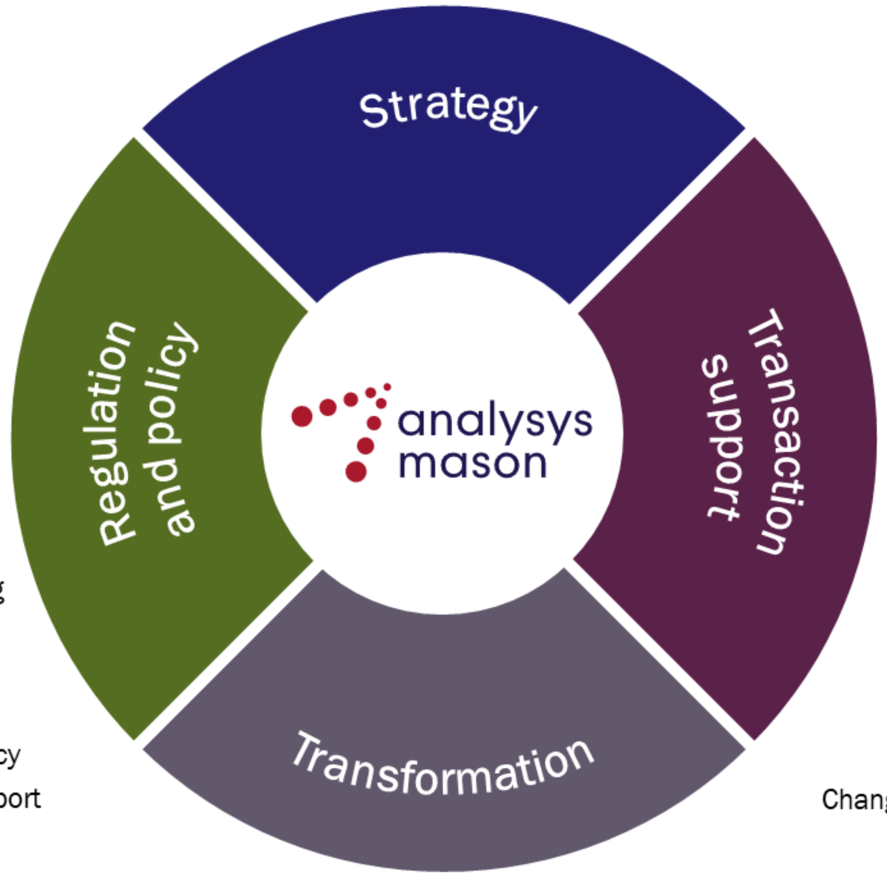
Regulatory accounting

Regulatory benchmarking and analysis

Spectrum management and policy

Expert witness and litigation support

Postal regulation and policy



Transaction support

Commercial due diligence and market review

Technical due diligence

Post-merger integration

Periodical business monitoring and loan technical advisory

Opportunity scouting and pre-deal support

Transformation

Business transformation

Digitalisation

Operational excellence

Data, BI, steering and insights

Change and programme management

Sustainability

analysysmason.com/what-we-do/practices

PUBLISHED BY ANALYSYS MASON LIMITED IN JUNE 2022

Analysys Mason Limited. Registered in England and Wales with company number 05177472. Registered office: North West Wing Bush House, Aldwych, London, England, WC2B 4PJ.