Publication date:
March 2024
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SASE: Choosing the Right Path for Your Business

Goals and challenges in the enterprise SASE journey

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The goals that motivate enterprises to deploy SASE

SASE (Secure Access Service Edge) is a framework that unifies network, cloud and security. There are five key functions to SASE, plus many optional add-on components. Enterprises adopt SASE for many reasons. Pieces are added and configured to suit the goal.

Enterprise IT decision-makers have several goals for SASE. Some emphasize functionality and better experiences. Others focus on efficiency, simplicity, or lower cost.

This white paper draws from a 2023-24 global survey commissioned by Tata Communications from news and analysis site Telecoms.com. The survey included 151 executive decision-makers at large, multi-site enterprises that either have operational SASE, or are deploying or planning SASE.

Predictably, when it comes to SASE deployments enterprise size and industry matter. But the major differences are based on each enterprise's SASE goals. Omdia's analysis reveals six key clusters of enterprise behaviors around cloud enablement, network improvements, security improvements, user experience, operational efficiency, and cost savings.

Each behavioral cluster is represented here as an enterprise SASE buyer persona. Each buyer persona has different SASE goals. They differ from each other in their goals for SASE, the challenges they face, and in service provider partner preferences to help them overcome those challenges.

*For example, if your organization's principal SASE goal is to improve worker/partner/client experiences, you are a **User Advocate**. User Advocates group user experience, remote working, and scalable network services together. They focus on SD-WAN and zero trust network access (ZTNA) SASE functions. User Advocates more often need outside expertise with SASE. They want to achieve remote work connectivity and reliable network performance. They turn to managed SD-WAN partners that can upgrade them into SASE solutions.*

What is, or are, your enterprise's principal goals in SASE? Following the SASE buyer personas in this White Paper should help focus your organization on what goals to prioritize in the SASE journey. It will help consider what features are most important, what challenges may lie ahead, how your peers partnered to face those challenges in the past and how trends are changing.

Figure 1: SASE's adoption personas based on clusters of related enterprise benefits and goals

The Multi-cloud Maven – 13% of enterprises

Multi-Cloud Mavens aim to connect clouds to each other. These enterprises are interested in better control over data, and in reducing cost.

Goal: Reduce risk by using multiple clouds

Additional goals: Visibility & control over data usage. Lower TCO.

The User Advocate – 22% of enterprises

User Advocates want to improve their users' experiences. They also want network capacity to be more flexible and support remote work.

Goal: Improve user experiences

Additional goals: WAN scalability. Remote work connectivity.

The Standards Bearer – 17% of enterprises

Network Standards Bearers are likelier to run corporate networks over internet VPNs and hybrid networks. They want to consolidate platforms and get better visibility and control over data.

Goal: Enforce global consistency

Additional goals: Visibility & control over data usage. Consolidate network platforms.

The Efficiency Expert – 16% of enterprises

Efficiency Experts want to improve their operations. Like Network Standards Bearers, they want visibility and control over data. But they tie these goals to faster, secure cloud adoption.

Goal: Management ease, operational efficiency

Additional goals: Secure cloud data access. Accelerate cloud adoption. Visibility & control over data.

The Cost Controller – 30% of enterprises

Cost Controllers focus on reduced TCO. Consolidating the network is one objective. Cost controllers overlap with Multi-Cloud Mavens, looking to attach to several clouds.

Goal: Reduce total cost of ownership (TCO)

Additional goals: Consolidate network platforms. Reduce risk by using multiple clouds.

The Security Simplifier – 40% of enterprises

Security Simplifiers want to use SASE for an end-to-end security model, remote work, data protection, and secure cloud access. Security simplifiers also aim to consolidate network platforms and get better visibility and control over data.

Goal: Simplify, integrate end-to-end security

Additional goals: Remote work connectivity. Consistent data protection. Secure cloud data access

Source: Omdia

Once they go live, SASE adopters grasp the importance of network scaling

From planning SASE to operational SASE, trends are almost completely consistent. Enterprises realize the deployment goals they set out.

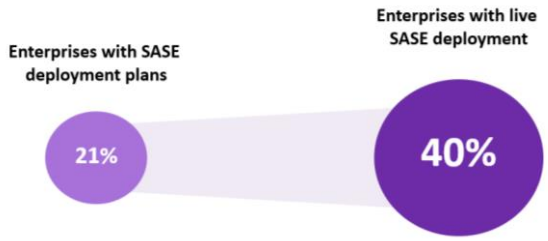
For example, if you are a Cost Controller you want lower TCO, and often also network platform consolidation and multi-cloud capability. Cost Controllers with operational SASE note they achieve these benefits: lower TCO, network platform consolidation, multi-cloud capability.

There is just one key departure.

Enterprises do not prioritize network scaling in the planning stages. But once they have operational SASE, scalable networking becomes a top enterprise benefit. Companies realize the value of flexible network scaling after they "go live".

As an enterprise planning your SASE journey, you will be better prepared if you include support for scalable network services in your deployment plan. This avoids the risk of being caught unprepared to support what many adopters discover is a key SASE benefit.

Figure 2: Only after launching operational SASE do enterprises fully grasp the value of scalable networks

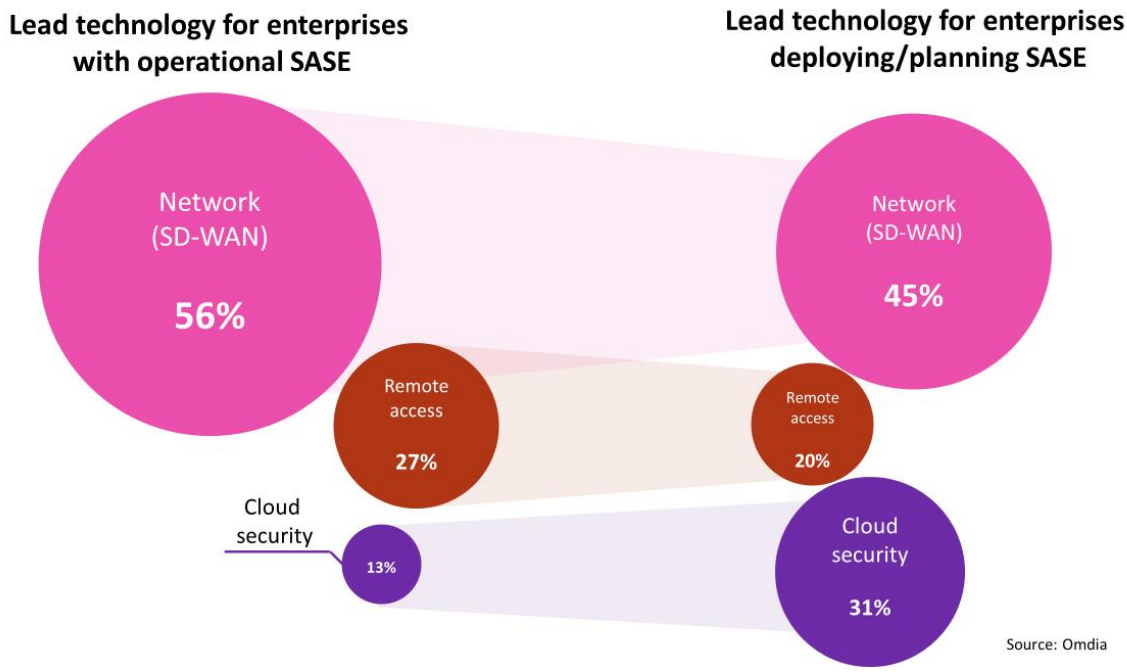


Most enterprises find entry to SASE through SD-WAN

Enterprises take different paths in their SASE journey. Most businesses with operational SASE today got there through SD-WAN. This is changing. Cloud-led security is an increasingly popular starting point for enterprises deploying SASE.

Very few enterprises attempt a sweeping conversion, from no network transformation direct to fully integrated SASE. However, enterprises do up-shift from existing components to managed services partners that can help provide fully integrated, single-platform SASE.

Figure 3: SD-WAN still leads but cloud security gains ground as lead objective for new SASE deployments



Source: Omdia

The SASE migration decision has been, and continues to be, a decision that is shared across network and security executives. Both teams need to work together for an integrated SASE deployment to work. This also leads to a blurring of lines, and of tasks. Security executives participate in SD-WAN upgrades; network executives participate in cloud security.

As your enterprise charts its SASE journey, be aware that there are now several possible paths. The best path into SASE – whether to move forward through network, cloud, or security upgrades – will depend on the structure of your organization's workforce, and the legacy of its platforms and services.

SD-WAN is the point of entry, but the catalyst for SASE adoption is cloud security

The entry point for enterprises into SASE is most often SD-WAN. But the drivers that bring enterprises to SASE are new functionality and cloud security. Different SASE buyer personas each have their own priorities for the features that they prioritize and value.

Figure 4: The SASE buyer personas and key functions that drive enterprises toward adoption

Multi Cloud Mavens aim to connect cloud resources. The top priority use case by far is Cloud Security Posture Management (CSPM, 55%), followed by SD-WAN (40%) to glue together cloud resources securely. Connectivity of edge, devices, and distribution (CDN, 35%) is also especially interesting to Multi Cloud Mavens.

User Advocates want better user experiences. Their priority use case by far is Zero Trust Access (44%). They want to empower users to get access to resources and information, with an eye to protecting those resources. User Advocates also see SD-WAN functionality (29%) as a priority for better experiences.

Network Standards Bearers, in line with their interests for consistent resource access, are more interested in remote browser isolation (36%) and CDN capabilities (36%) paired with SASE. Both help reinforce unified practices across the organization.

Efficiency Experts have a greater interest in Edge & IoT (38%), and SD-WAN (29%) use cases for SASE. Their goal of ease of management and operational efficiency spills over to connect a greater variety of resources to the rest of their SASE.

Cost Controllers predictably do not cluster around specific use cases. They are driven by use cases that can lower their costs. As a result, they favor Firewall-as-a-Service (FWaaS, 26%) opex-based security. They also have an interest in CDN capabilities (36%) paired with SASE.

Security Simplifiers are interested in all security functions SASE has to offer. They focus more on classic cloud security -- Cloud Access Security Broker (CASB), Data Loss Protection (DLP) and Content Inspection (35%) but are also interested across topics including CSPM (28%) and DNS Security (26%).

Source: Omdia.

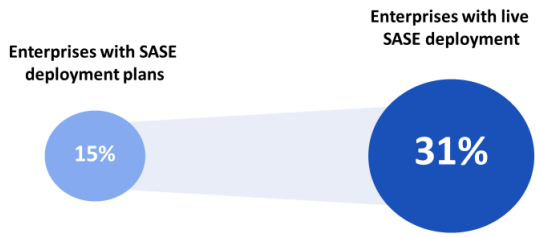
Once they go live, SASE adopters realize the network segment remains critical

Enterprises planning their SASE launch seem to have a blind spot. Many plan to upgrade into SASE through SD-WAN, but they don't value that link. Enterprises planning SASE rank the criticality of SD-WAN features such as bandwidth aggregation and optimizing traffic, utterly last.

Enterprises that have operational SASE see things very differently. They realize that SD-WAN is a critical element of their solution. It ranks in importance with core SASE cloud security features: CASB, DLP, CSPM.

As an enterprise planning your SASE journey, have SD-WAN alongside CASB, ZTNA, NGFW/FWaaS, SWG, remote access, and so forth. If the cloud-based secure service edge (SSE) is aligned with your SD-WAN security and traffic management, it can avoid future service problems around end-to-end network reliability and performance.

Figure 5: Enterprises exploring SASE under-rate SD-WAN. Those with operational SASE understand its value



Source: Omdia

Enterprises partner for success in SASE

SASE is a framework with many moving parts. Enterprises have different plans and objectives for their SASE deployment. The result is a complicated interplay. Enterprises face SASE deployment challenges they must address to get the outcomes they want.

For example, if you are an Efficiency Expert or Cost Controller, you will more often find yourself searching for a suitable all-in-one SASE offer. One of the related goals for both SASE buyer personas is a solution that will give you secure access to your cloud services.

Figure 6: The challenges faced by enterprises based on the benefits they wish to draw from SASE

Primary enterprise SASE challenge	Matching Persona(s) and Related Enterprise Goals	
"We need to integrate SASE into existing solutions**"** Faced by 60% of SASE adopters		A challenge for **Security Simplifiers** (goal: integrated end-to-end security). Related action items include: - Remote work connectivity - Consolidated security platforms
"We need to unify our network and security teams" Faced by 49% of SASE adopters		Another challenge for **Security Simplifiers** (goal: integrated end-to-end security). Related action items include: - Remote work connectivity - Consistent data protection (DLP)
"We lack understanding of the available tool landscape" Faced by 29% of SASE adopters		A challenge for **Standards Bearers** (goal: enforcing global consistency) and **Multi Cloud Mavens** (goal: connecting multiple clouds). Related action items include: - Consolidated security platforms - Visibility & control over data usage
"We want to deploy an all-in-one SASE offer" Faced by 18% of SASE adopters		A challenge for **Efficiency Experts** (goal: ease of management) and **Cost Controllers** (goal: lower TCO). Related action items include: - Secure cloud data access
"We need to augment our in-house SASE experience" Faced by <10% of SASE adopters		A challenge for **User Advocates** (goal: improved user experiences). Related action items include: - Remote work connectivity - Reliable network performance

Source: Omdia

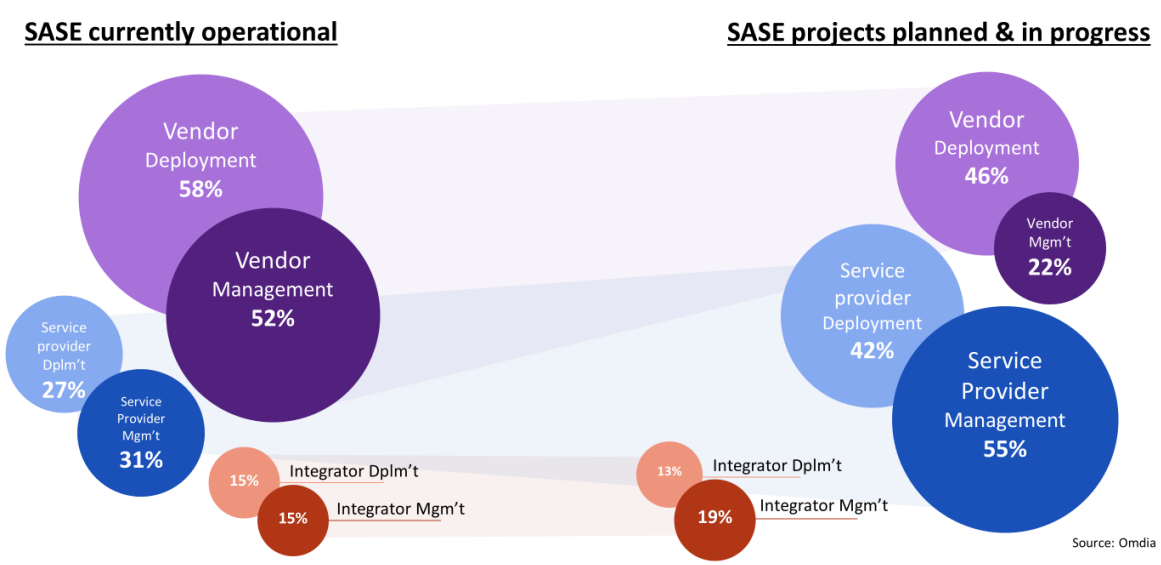
Enterprise SASE supplier and partner preferences

Partners play key roles in enterprises' SASE journey. Almost all enterprises (97%) use outside help for aspects of SASE management. Those few (3%) that self-manage are still in pilot stages.

As SASE evolves, enterprises are shifting their preferred partners. The first wave of SASE adoption teamed with vendors and distributors. Enterprises are increasingly turning to service providers for deployment and for ongoing managed services.

Enterprises see service provider partners as better equipped to address their challenges: To integrate SASE into existing solutions, bring together network and security teams, make sense of available tools, supply and support the right single-platform solution, and provide ongoing expertise.

Figure 7: Enterprises at first favored vendors for SASE; increasingly they are turning to service providers



Source: Omdia

The role of service providers for enterprise SASE

Each SASE buyer persona has its own goals and challenges, and each persona looks for partners that can best meet its goals. There are two major decision points. Best partners for solutions selection, design and deployment; and best partners to manage and support SASE once it is operational.

Enterprises need to decide what type of partner works best for them: From the SD-WAN camp, adding SSE; from the SSE camp, adding SD-WAN; a managed services provider (MSP) with a fully unified SASE platform; or a point solutions provider that brings pieces, but does not have integrated SASE.

Figure 8: Personas choose their preferred service provider partner roles to address their SASE challenges

SASE challenges faced	Preferred trends for working with partners
 - Understand the available tool landscape - Consolidate security platforms - Visibility & control over data usage	**Multi Cloud Mavens** follow their cloud calling. This segment is still working on its strategy, with many pilots and few large deployments. - Lead with SSE provider (add SD-WAN). - Call on partners for managed advisory, design and deployment. - Use vendors for selection, providers for management.
 - Augment in-house SASE - Add remote work - Reliable network performance	For **User Advocates**, provider partner choices are pragmatic: They just want their services up and running. This segment is deep in operational SASE, and one-third have widespread deployments. - Use vendors for selection and deployment, service providers for management. - Lead with SD-WAN provider (add SSE).
 - Understand the available tool landscape - Consolidate security platforms - Visibility & control over data usage	**Network Standards Bearers** focus on network first. - Lead with SD-WAN provider (add SSE). - Use anyone for management: vendors, service providers, integrators. - Buy managed threat intelligence services, further protecting the network.
 - Deploy single-platform SASE - Secure cloud data access	**Efficiency Experts** partnering choices are pragmatic, but they want to work at scale. This segment has many widespread SASE deployments. - Instead of SD-WAN vs. SSE, they engage MSPs for unified SASE or point solutions partners. - Use vendors for deployment, and either vendors or service providers for management.
 - Deploy single-platform SASE - Secure cloud data access	**Cost Controllers** partnering choices are pragmatic: Their smaller-scale deployments often favor the economics of networking partners. - Design their own solutions, then turn to service providers for management help. - Deploy SASE as part of an IT integration project (but without engaging a costly integrator). - Lead with SD-WAN provider (add SSE).
 - Unify network/security teams - Integrate SASE into existing solutions - Data protection (DLP) - Consolidate security platforms	**Security Simplifiers** lean toward holistic partnering that answers their security needs. - Design their own solutions, heavily prefer service providers for management help. - Lead with SD-WAN provider or MSP partner. None work through point solutions partners. - Get managed security assistance; manage their own network traffic.

Source: Omdia

Tasks assigned to partners by SASE adopters

Enterprises need to decide what tasks to assign to outside help: support for the initial design/install/deployment phases; hardware/software maintenance; network management; security management; and premium managed security options.

When it comes to sourcing individual managed services and functions, SASE buyer personas behave pragmatically. They choose from available provider partner capabilities and match services to needs. There are only a few trends that turn certain buyer personas into outliers.

Figure 9: Personas have different needs, but nearly all enterprises look for managed services help with SASE

Managed Service	Assess, design, install	Traffic policy management	Security policy manag't	Premium Security (Threat intel)	Maintain hardware, software
Average take rate	**33%**	**40%**	**48%**	**34%**	**35%**
Personas that embrace this managed service	 **Multi Cloud Mavens** need help realizing their vision (45% use partners)	 **Multi Cloud Mavens** prefer others to handle their network (50% use partners)	*SASE buyer personas are about equally interested in help with security.*	 **Network Standards Bearers** want extra security to protect their operations (44% use partners)	 *Most SASE buyer personas are about equally comfortable off-loading solutions maintenance*
Personas that abstain from this managed service	 **User Advocates** and **Cost Controllers** prefer to design their own solutions (74% keep in-house)	 **Security simplifiers** see in-house control over networking as part of the security strategy (68% keep in-house)	 **Efficiency Experts** are pragmatic buyers across all functionality	 **Cost Controllers** are least interested in premium functions that add to cost (79% keep in-house)	 **Multi Cloud Mavens'** cloud-based services require no separate maintenance (80% keep in-house)

Source: Omdia

As an enterprise embarking on SASE journey, it is important to choose a partner that can offer a wide range of management assistance. Your organization might start with ambitions to handle most of its management in-house, and realize later that there are parts of SASE that are better offloaded. They are hard to manage and maintain, or are not strategic to the business.

Unified SASE addresses simplicity and efficiency

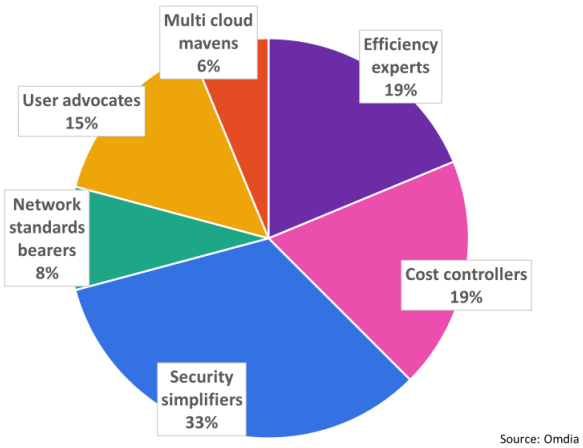
Nearly three-quarters of enterprises who engage with SASE start at one of two ends: With a SD-WAN provider that can take them to SSE, or with an SSE provider that can expand into SASE. Only one in five enterprises engage with an MSP that can provide them with a fully turnkey solution.

Those SASE buyer personas that lean toward simplicity, efficiency, and cost savings prefer the end-to-end holistic offers of MSPs. Other personas – Multi Cloud Mavens and Network Standards Bearers – start with a focus on the cloud or the network. Most of them are not yet interested in fully unified SASE solutions.

Enterprises that go to MSPs for fully unified SASE still face the same challenges as their peers. They need to integrate SASE with their installed base. They need to unite their siloed network and security teams. They are still challenged to understand the broader landscape of cloud, network, and security tools.

As an enterprise planning your SASE journey, recognize that MSPs with unified solutions under single-platform SASE are an innovative option. But technology innovation alone does not address the bigger SASE migration challenges. Your journey will need a partner that can help with the shift in company culture, operations and integration assistance, and in training and

Figure 10: There is demand across SASE buyer personas to engage MSPs with end-to-end solutions



Source: Omdia

Next steps: Your enterprise SASE journey

There are many moving parts to SASE. What are your company's SASE priorities? Are you a(n):

Multi Cloud Maven, looking first to connect clouds, led by SSE partners that can pull through network functionality?

User Advocate, looking for opportunities pragmatically to operationalize SASE components for the benefits of your workforce, partners, and/or customers?

Network Standards Bearer, finding the right tools to make the network universally secure and enforce high levels of performance?

Efficiency Expert, pulling together different functions and applications, to get more synergy from services and tie them securely back to the cloud?

Cost Controller, using SASE for your own brand of efficiency: uniting functions and applications to decrease your costs?

Security Simplifier, looking to integrate platforms and tie together teams, so that networks and clouds are administered under a common set of tools?

Wherever your next steps in the SASE journey, rest assured your SASE deployment's scope will expand as your priorities evolve. Today's network-led solution may be tomorrow's drive to unify security; later, your focus may turn onto efficiency. SASE journeys are flexible. There are many paths to choose from in implementing secure network, secure cloud, and secure remote access.

Across all SASE buyer personas, service provider partners are key to future deployments. The SASE journey is complicated. Almost everyone hires an expert guide to help on this journey. Managed services partners have the necessary history and understanding of your enterprise's operations and bring a wider world view across SASE elements and suppliers, spanning network, security, and cloud.

Afterword: SASE's vital role for enterprises

SASE pulls together network, cloud and security functionality in one, comprehensive, compelling solution. Enterprises have practical reasons to pull the pieces together. The challenges they want to solve include:

- **Security sprawl.** Enterprises are overwhelmed by cyber security tools. They want to consolidate and simplify.
- **Public networks.** The public internet is flexible, fast, and cost-effective. But enterprises are worried about exposing company data on public networks.
- **Cloud performance.** Cloud services are handling corporate applications. Enterprises are concerned that their connections are reliable and secure.

SASE combines elements of network, security, and cloud. The key functions are:

- **Software defined WAN (SD-WAN)** manages network reliability and applications performance.
- **Next generation firewall (NGFW)** monitors and protects network-layer traffic.
- **Secure web gateway (SWG)** monitors and protects applications-layer traffic.
- **Cloud access security broker (CASB)** monitors cloud usage and prevents loss of data.
- **Zero trust network access (ZTNA)** keeps devices from accessing unauthorized resources.

The SASE toolkit and framework promises to address enterprise challenges and provide benefits. Some of the solutions promised by SASE include:

- Secure, protected remote working
- Simpler, consolidated security
- Simplified, scalable network architecture
- Secure, controlled access to clouds
- Faster resource adds and configuration changes
- Visibility and control over data in transit
- Consistent user experiences
- Higher reliability, faster trouble resolution
- More comprehensive management
- Improved operational efficiency
- Greater value from platform synergy

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Appendix

Methodology

This white paper draws from a 2023-24 global survey conducted by Telecoms.com. The project surveyed 151 executive decision-makers at large, multi-site enterprises that were active in SASE. All respondents came from enterprises either with operational SASE deployments, or in the process of implementing SASE solutions, or in the planning phases with intent to add SASE functionality in the near future.

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We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help your company identify future trends and opportunities.

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