



2021 Market Share Leader Award

Unified SASE

Presented by: Dell'Oro Group

About Dell'Oro Market Share Leader Award



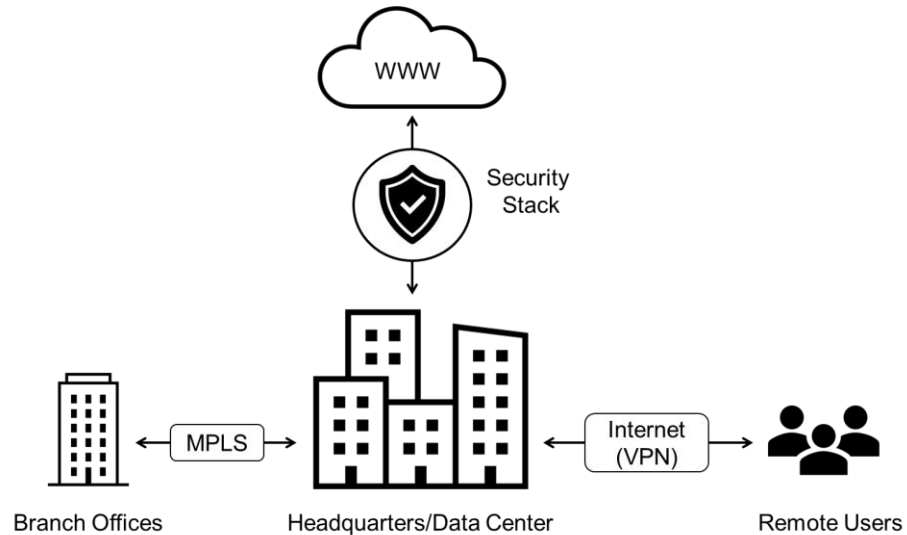
Dell'Oro tracks market size and share on a quarterly basis for most product categories within telecom, networking, network security, and data center IT. Using objective data and a proven and respected methodology, Dell'Oro Group identifies the leading supplier by total annual revenue in specific product categories.

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SASE: A Natural Evolution of Enterprise WAN Networking

Legacy Network Topology



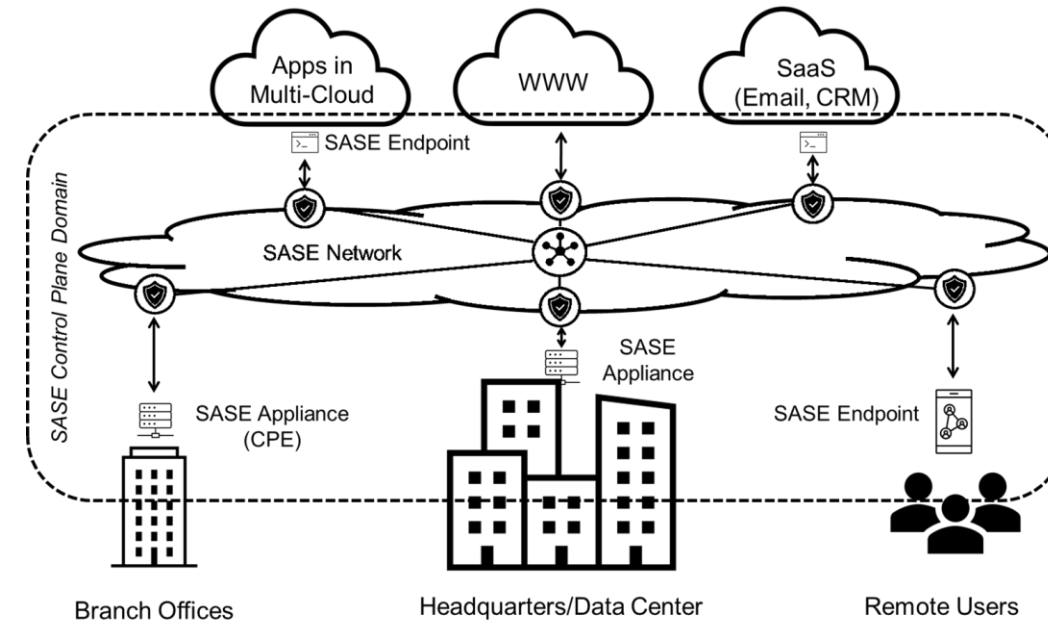
Enabling Technologies

SD-WAN



**Cloud-Based
Network
Security**

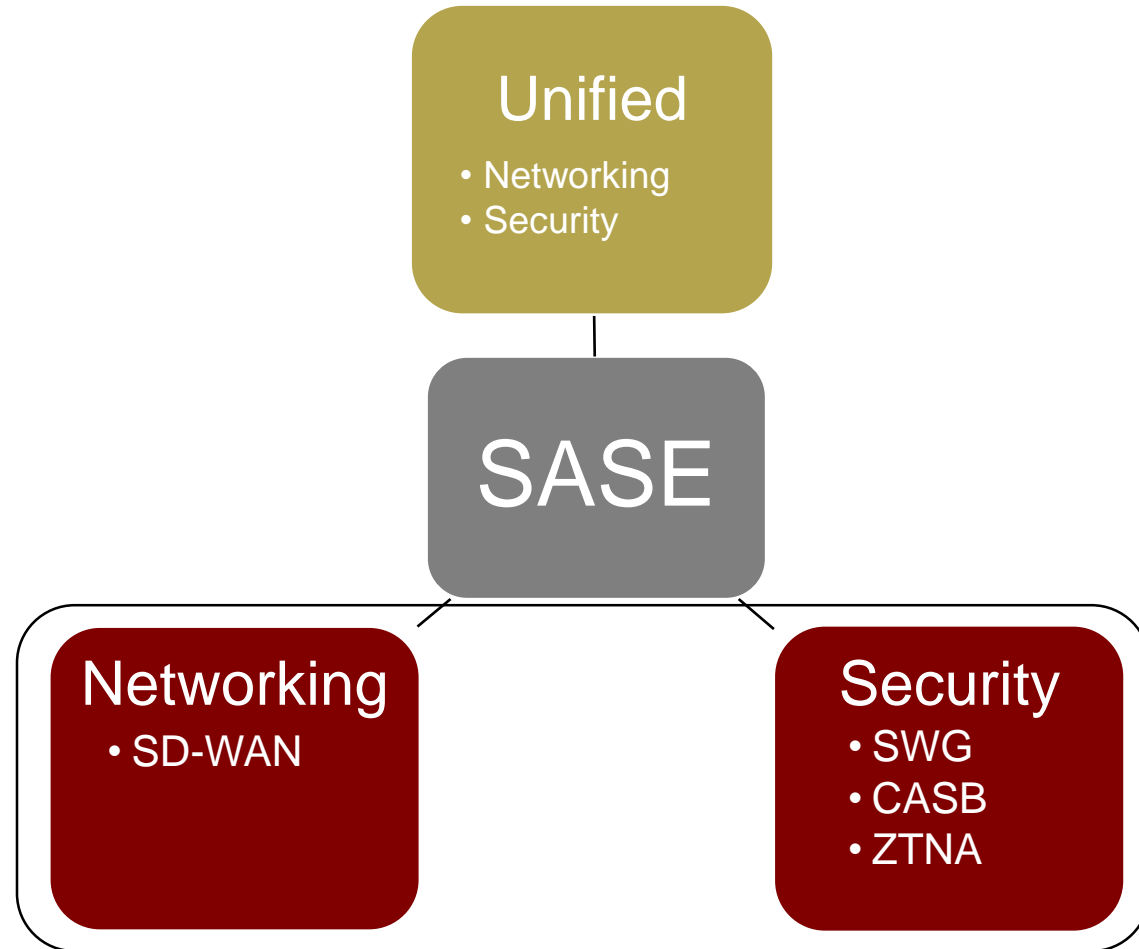
Modern Network Topology



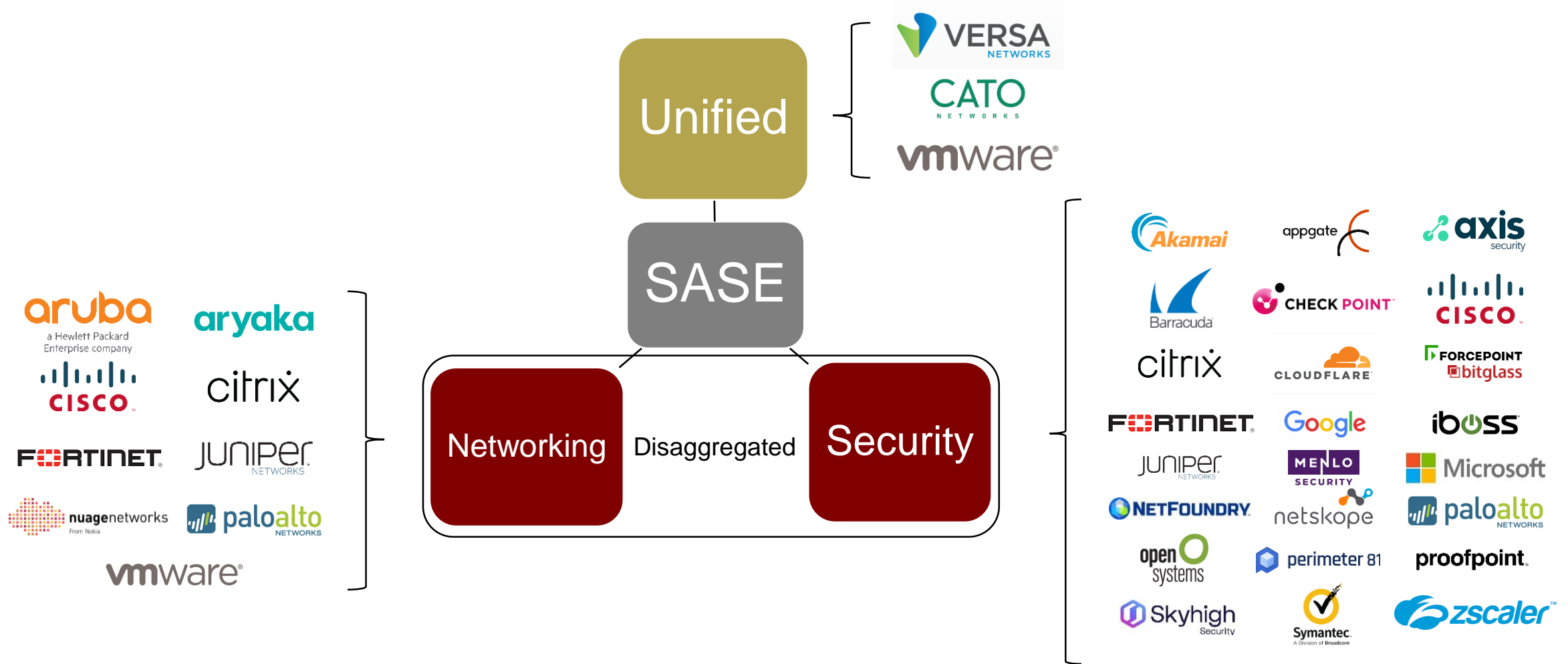
SASE Implementation Types

#1: Tightly integrated pure play
(Unified)

#2: Multi-product or multi-vendor
(Disaggregated)



SASE Vendor Landscape



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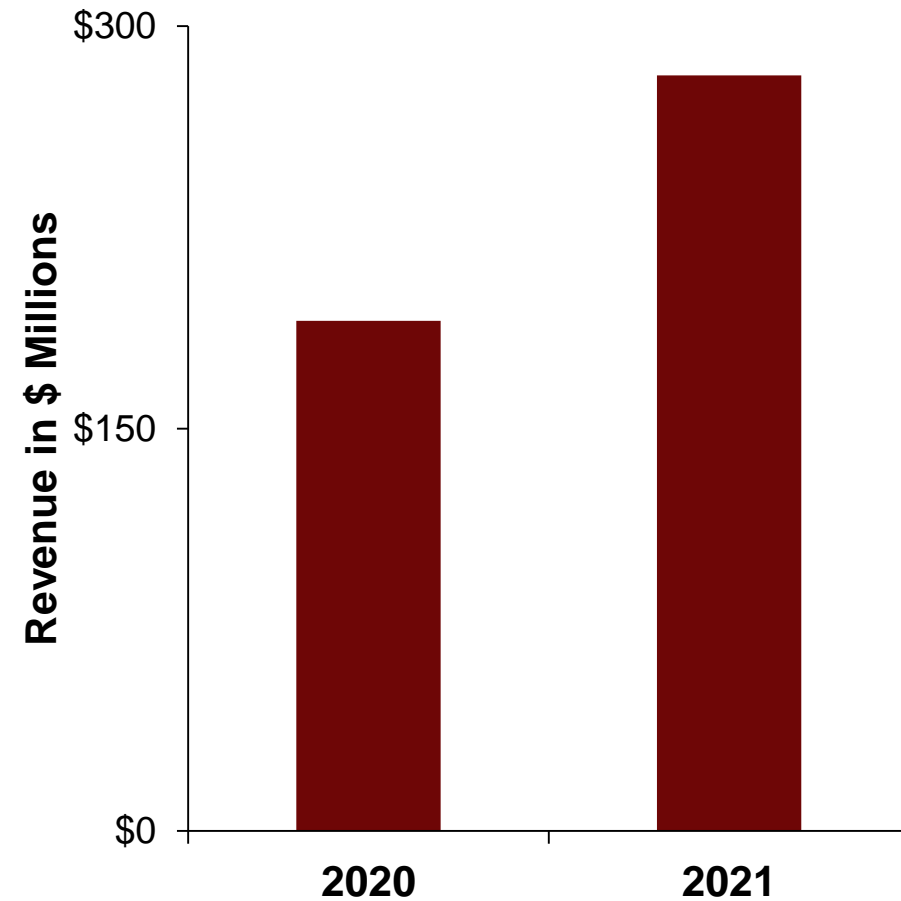
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Unified SASE Market 2021

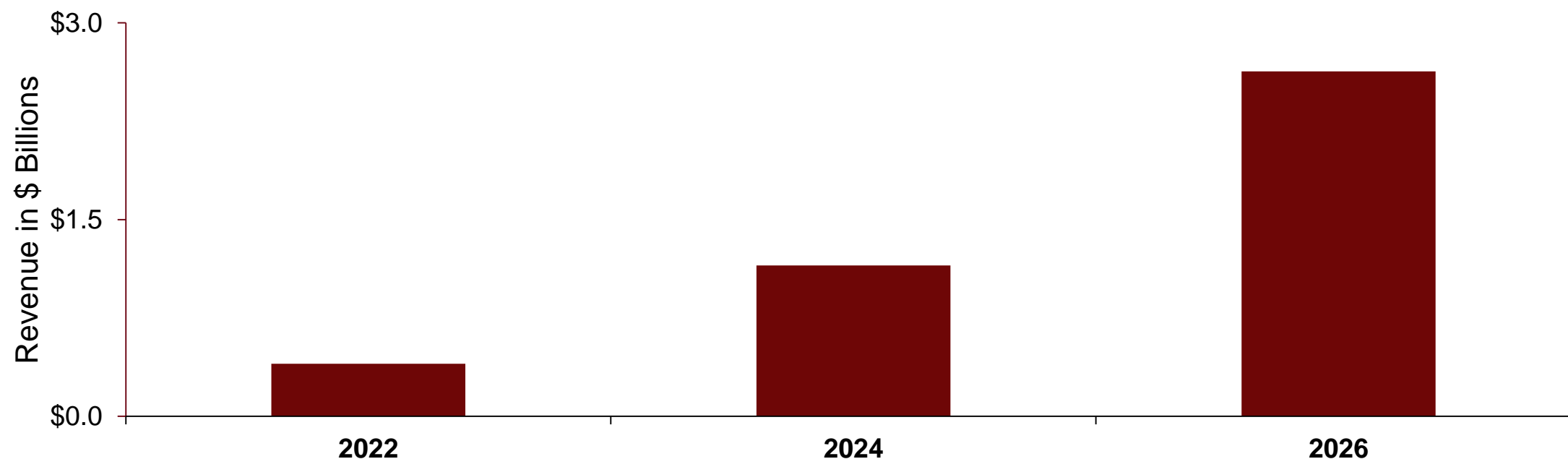


Unified SASE:

- Brings together networking and security into a single integrated, turnkey platform
- Grew faster, 48% Y/Y, in 2021 than disaggregated SASE (37%)



Unified SASE Market Forecast

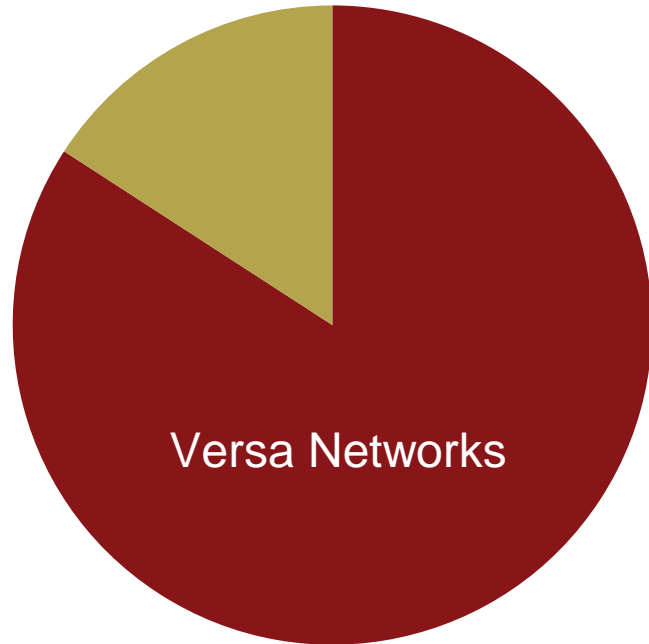


- Expected to grow faster than disaggregated SASE
- 5-Year CAGR: Unified - 56%, Disaggregated – 15%

- Expect strong uptake by mid-market enterprise early on
- As market matures, balance of trade shifts towards large enterprise



Unified SASE Market Share Leader 2021



Versa Networks led the Unified SASE market in 2021 with 84% market share



Unified SASE Market Revenue Ranking 2021

Global



Rank #1

Versa Network



Rank #2

Cato Network



Rank #3

VM Ware

About Dell'Oro Group



- Founded in 1995 and headquartered in Silicon Valley.
- Boutique research firm specializing in telecommunications infrastructure, network security, enterprise networks, data center IT.
- Quarterly Reports on market share, market size, and pricing, by macro region of the world.
- 5-Year Forecast Reports, analyst judgement on technology trends, market size tables with history and forecast.
- Industry executives, investors, and government agencies use our data for critical decision-making.
- Earned the reputation as the “Gold Standard”.



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