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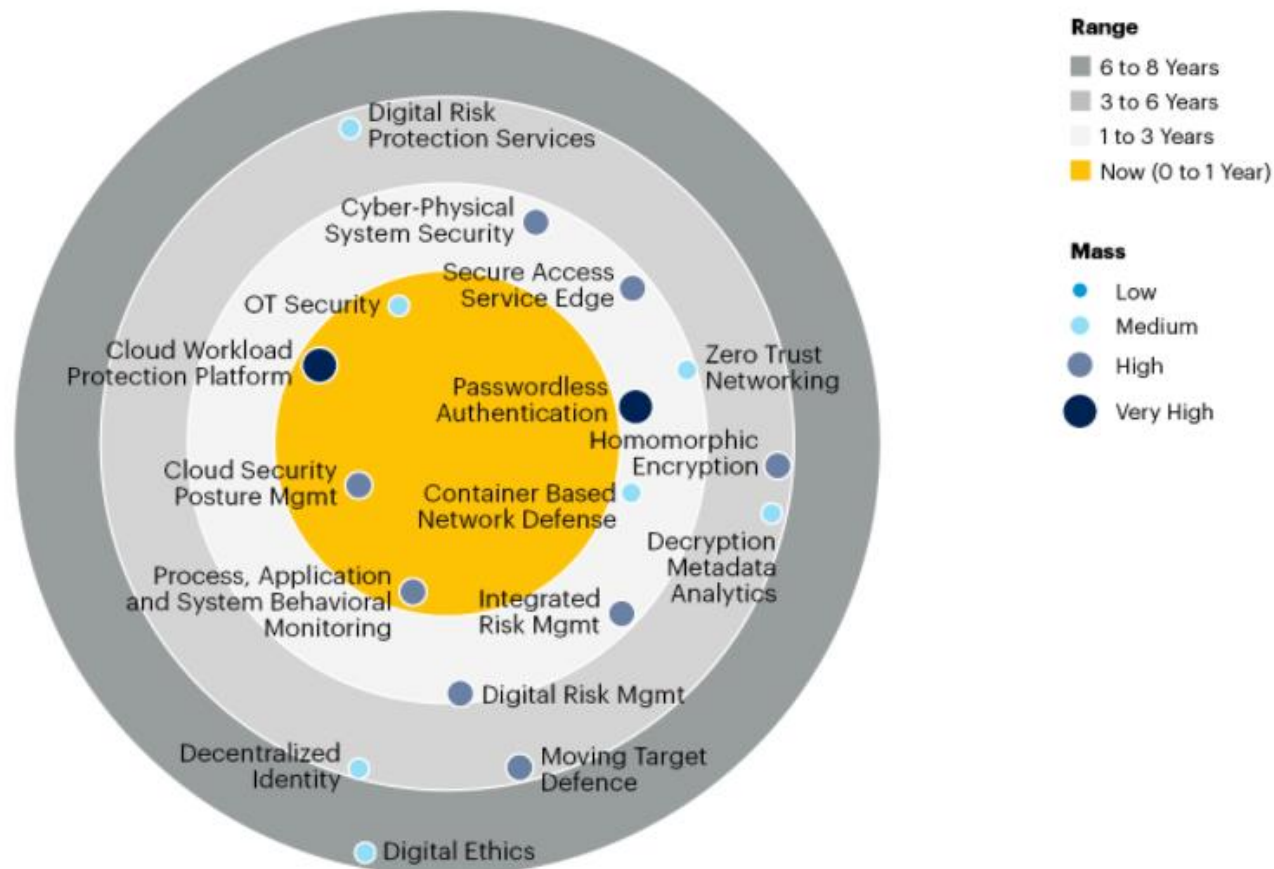


Evan Zeng

Sr Director Analyst



Emerging Tech & Trends Impact Radar- Seucrity



Source: Gartner
724138_C

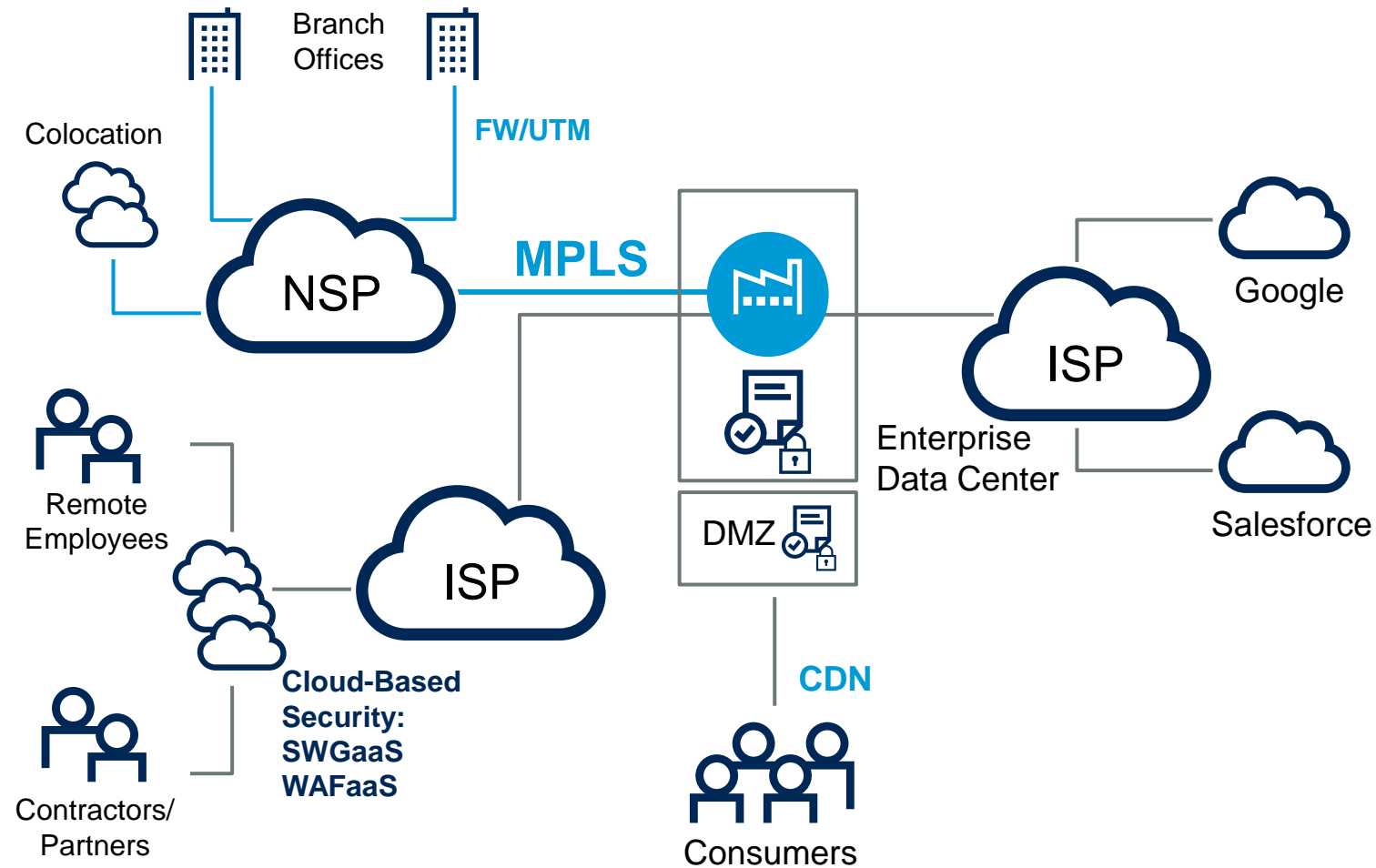
Key Issues

1. What Market and Technology Factors to Drive SASE Development?
2. How and Why Will Enterprises Adopt SASE ?
3. As a Tech Provider, How to Respond to this SASE Trend?

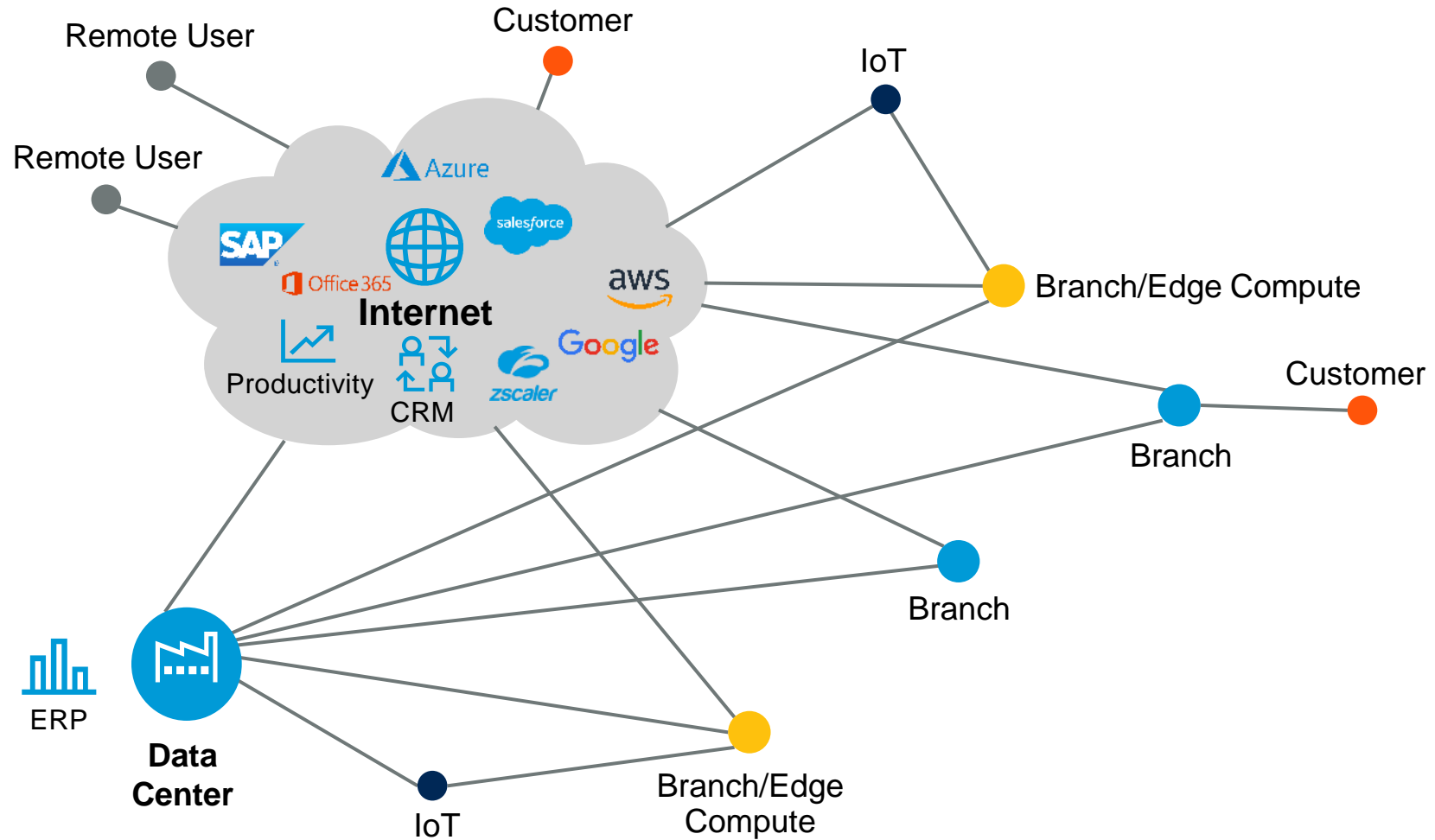
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From Data Centers at the Center

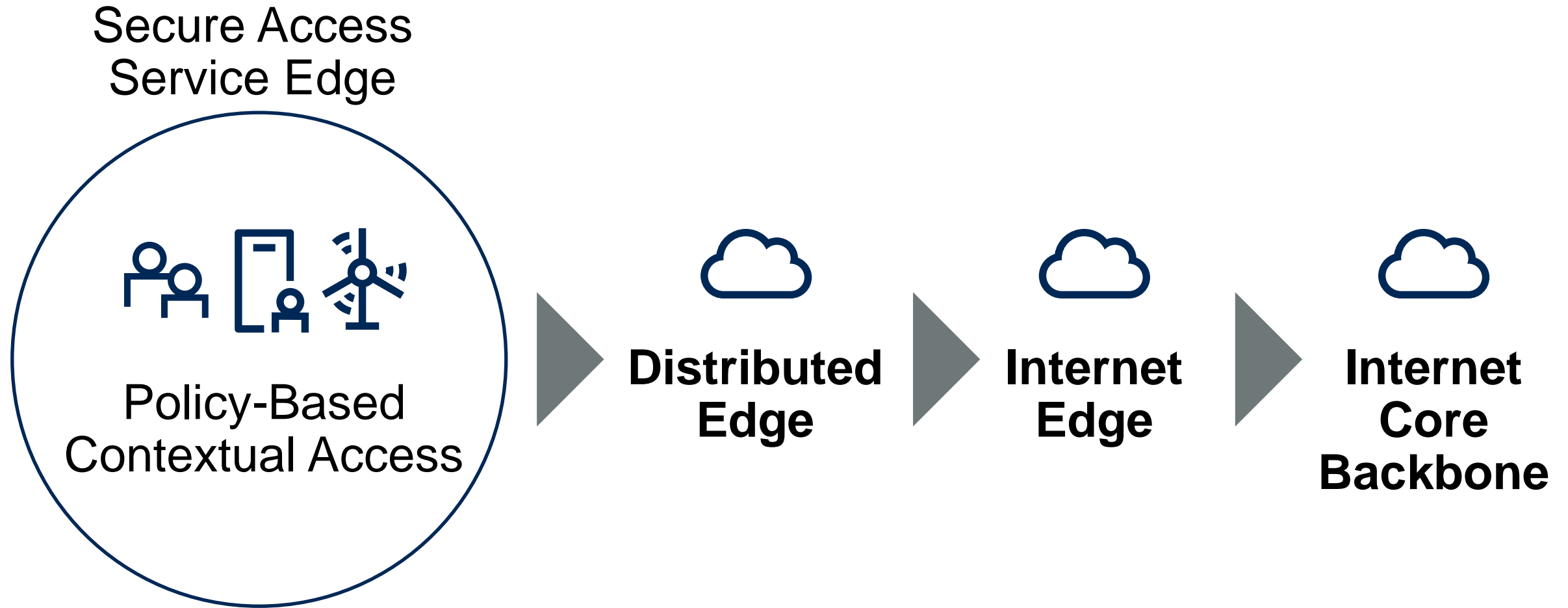


To the Centers of Data



**Instead of the security perimeter being entombed in a box at the data center edge, the perimeter is now everywhere an enterprise needs it to be —
A dynamically created, policy-based secure access service edge.**

To People, Devices, Apps and IoT/OT Entities



Secure Access Service Edge Convergence

**Network as
a Service**



Connect it

**Network Security
as a Service**



Secure It

Sensitive Data
Awareness

Threat
Detection

Clash of the Titans

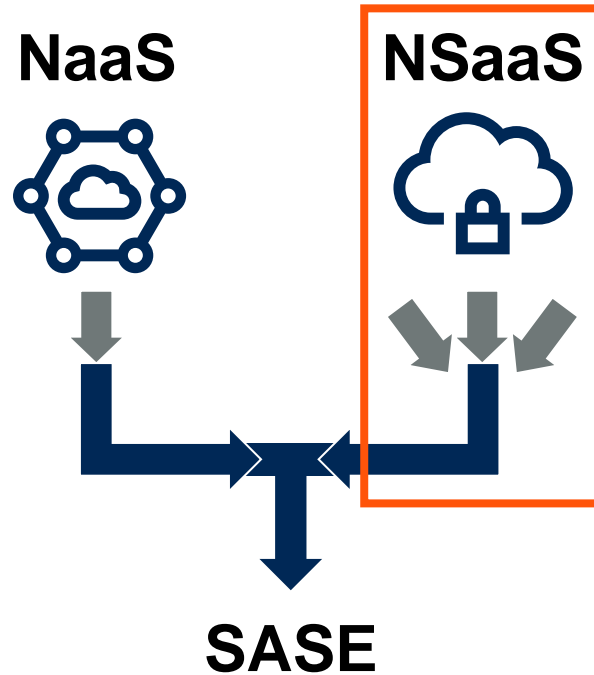
Secure Access Service Edge

You want to inspect a given piece of content for risk.

Does it make sense to scan for badness and then again for goodness?

Are these really different problems?

Secure Access Service Edge Convergence



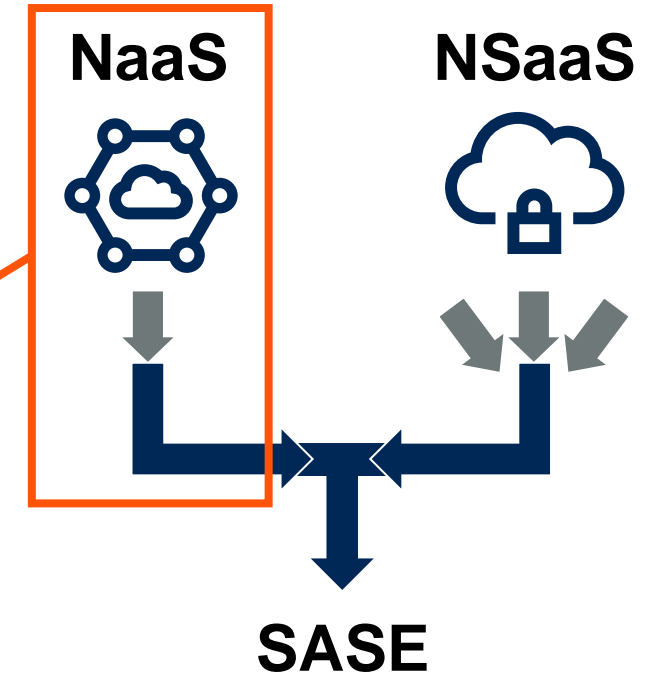
- CASB
- Cloud SWG
- ZTNA/VPN
- Remote Browser Isolation
- WAAPaaS
- FWaaS
- Sandboxing

A remote/mobile user needs access to the internet, Microsoft 365, Salesforce, Box and enterprise private apps — All at the same time.

Are these really different problems?

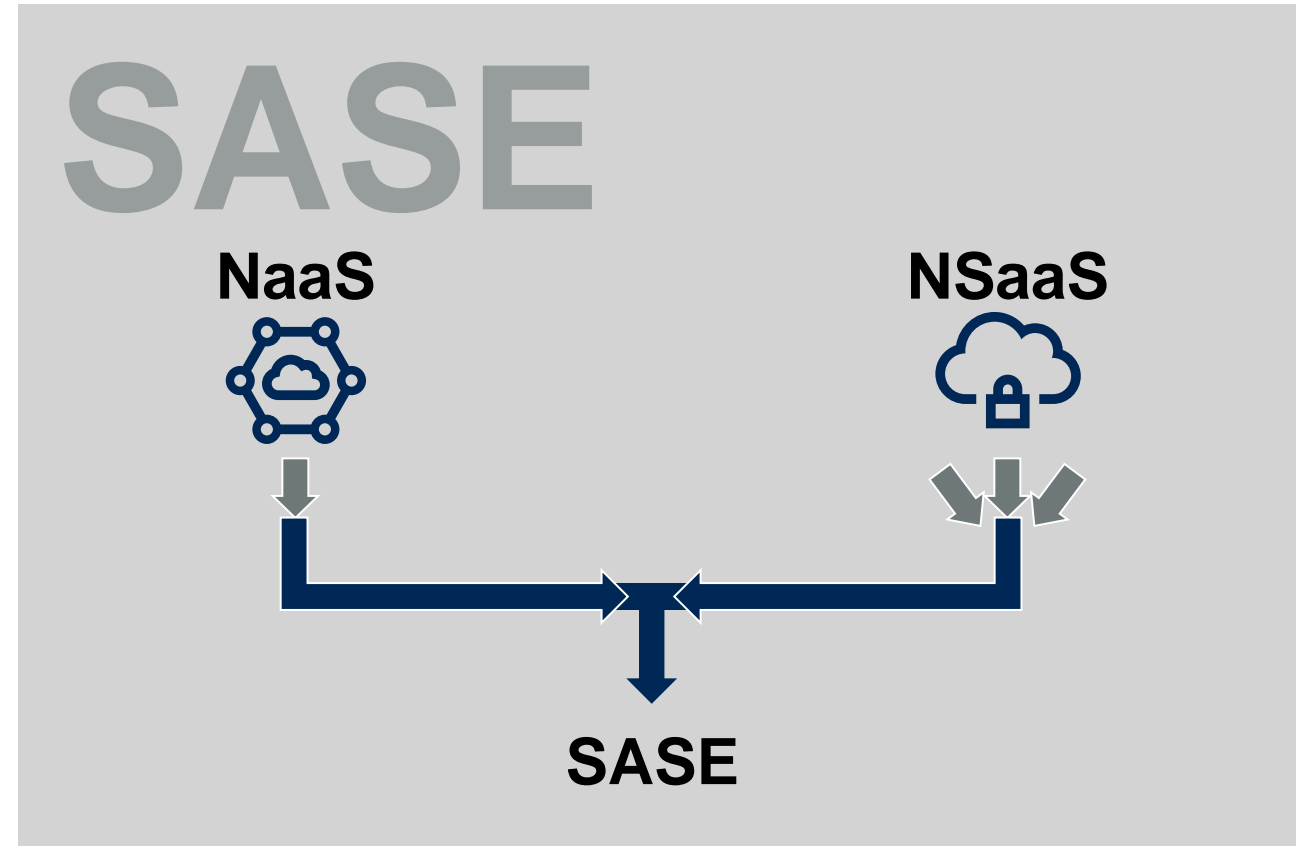
Secure Access Service Edge Convergence

- SD-WAN
- CDN
- WAN optimization
- Bandwidth aggregators
- Network service providers

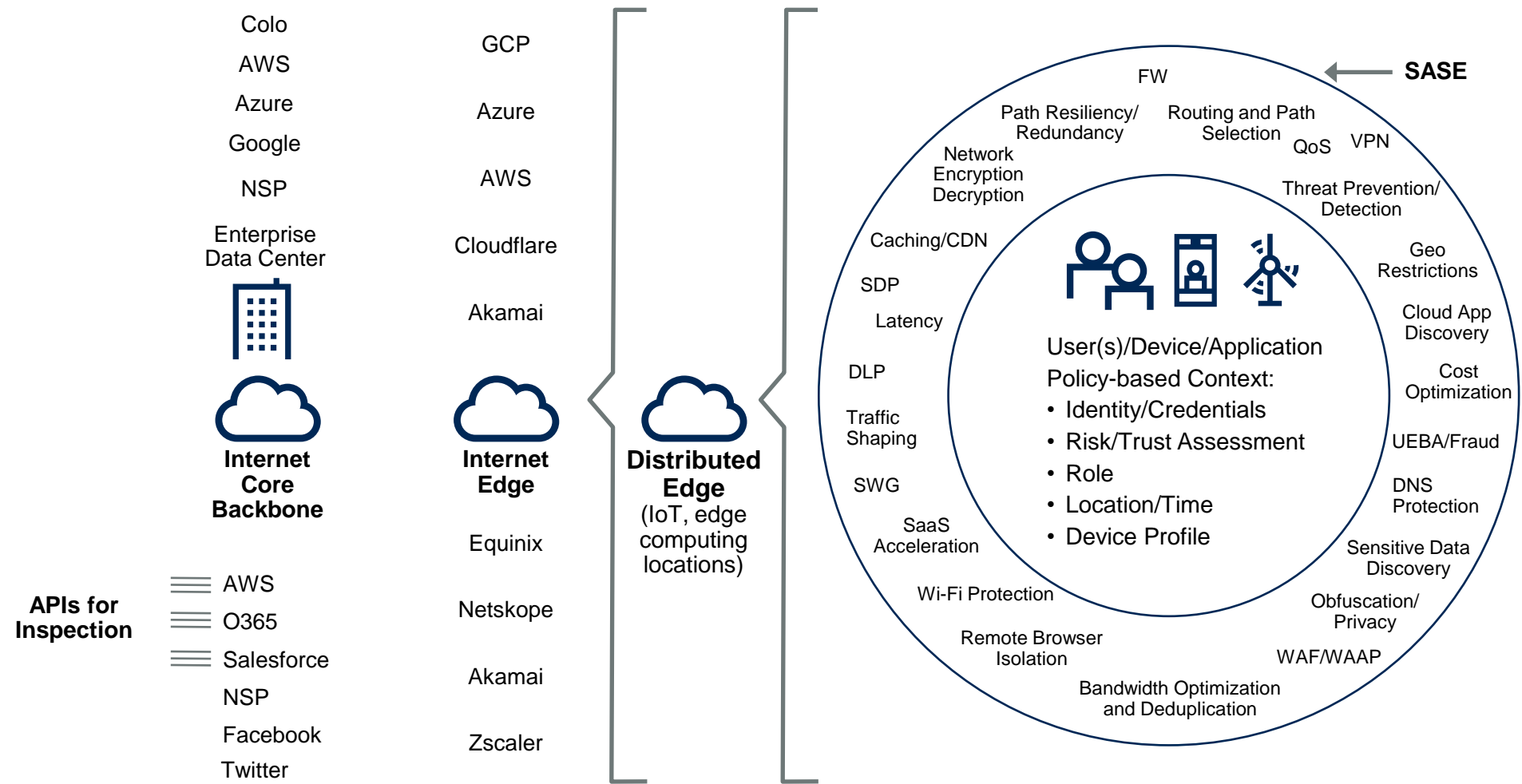


Secure Access Service Edge Convergence

SASE is an emerging offering combining comprehensive networking and security functions (such as SD-WAN, firewall as a service [FWaaS], SWG, CASB and ZTNA) to support the dynamic secure access needs of organizations



Identities Are the New Perimeter



AWS: Amazon Web Services; Azure: Microsoft Azure; DLP: data loss prevention; GCP: Google Cloud Platform; O365: Office 365; SDP: service delivery platform; UEBA: user and entity behavior analytics.
 Source: ["The Future of Network Security Is in the Cloud"](#) (G00441737)

Polling Question 1 of 3

Do you plan to develop SASE product offerings by 2022?

- A. no plan yet, first time to hear this**
- B. no plan yet, still in discussion**
- C. have plan to develop SASE offering by 2022**
- D. have plan to develop SASE offerings, but not date yet**
- E. I am an end users, not a provider**

How to participate in our polling

If you are in full screen mode – click Esc
The poll question is on the “Vote” tab.
Please click the box to make your selection.
Upon voting you will see the results.

Thank you!

Ask a question

Attachments

Vote

Rate this

Details

Q. Polling Question

(please choose 1 answer)

A. Answer

☐

B. Answer

☐

C. Answer

☐

D. Answer

☐

E. Answer

☐

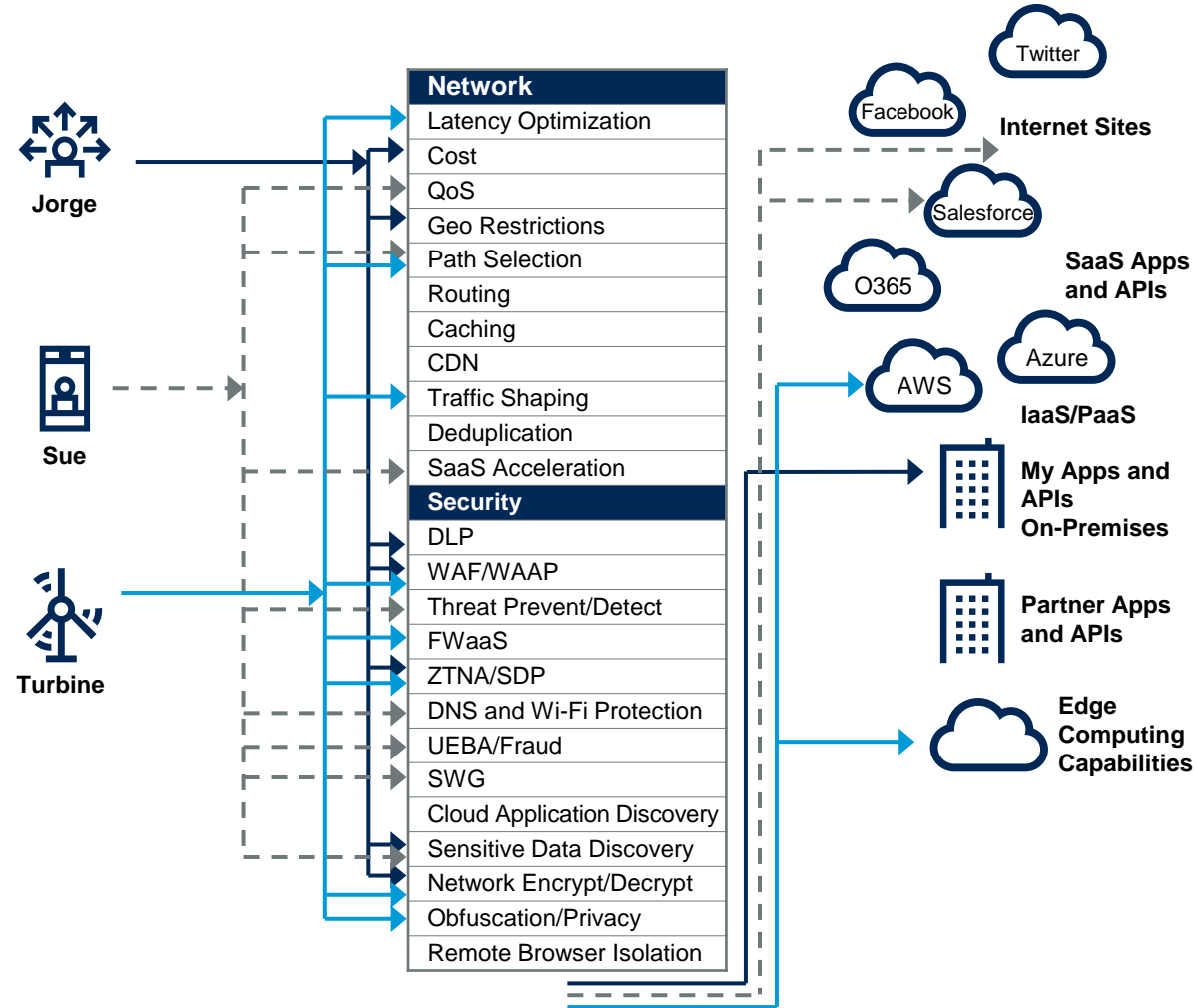
Key Issues

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Strategic Planning Assumption

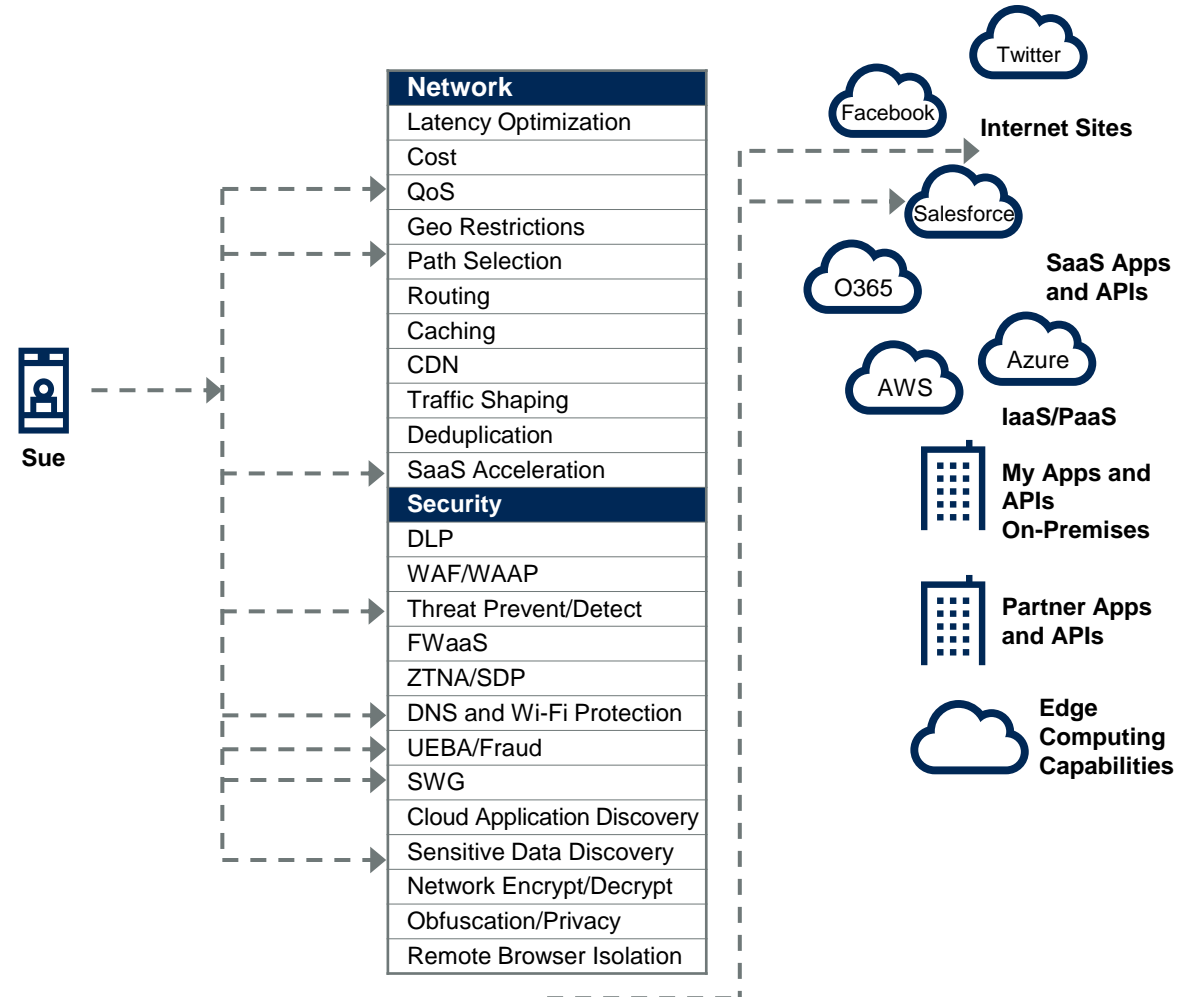
By 2023, **20%** of enterprises will have adopted SWG, CASB, ZTNA and branch FWaaS capabilities from the same vendor up from less than 5% in 2019.

SASE Delivers the Right Services When and Where Needed



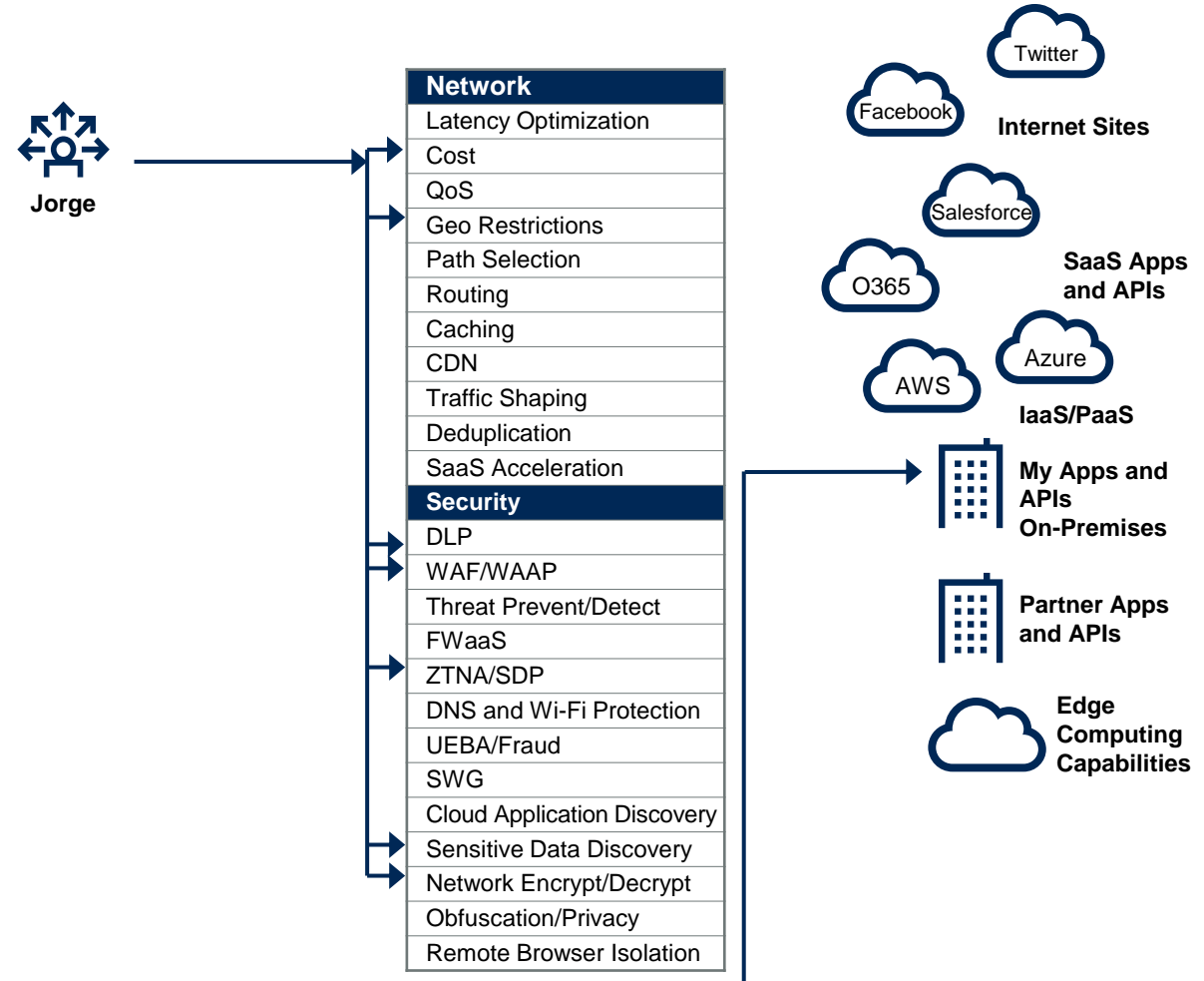
Sue in Accounting

- Access to Salesforce
- Access to Internet
- After Hours
- Airport Wi-Fi
- Managed Device



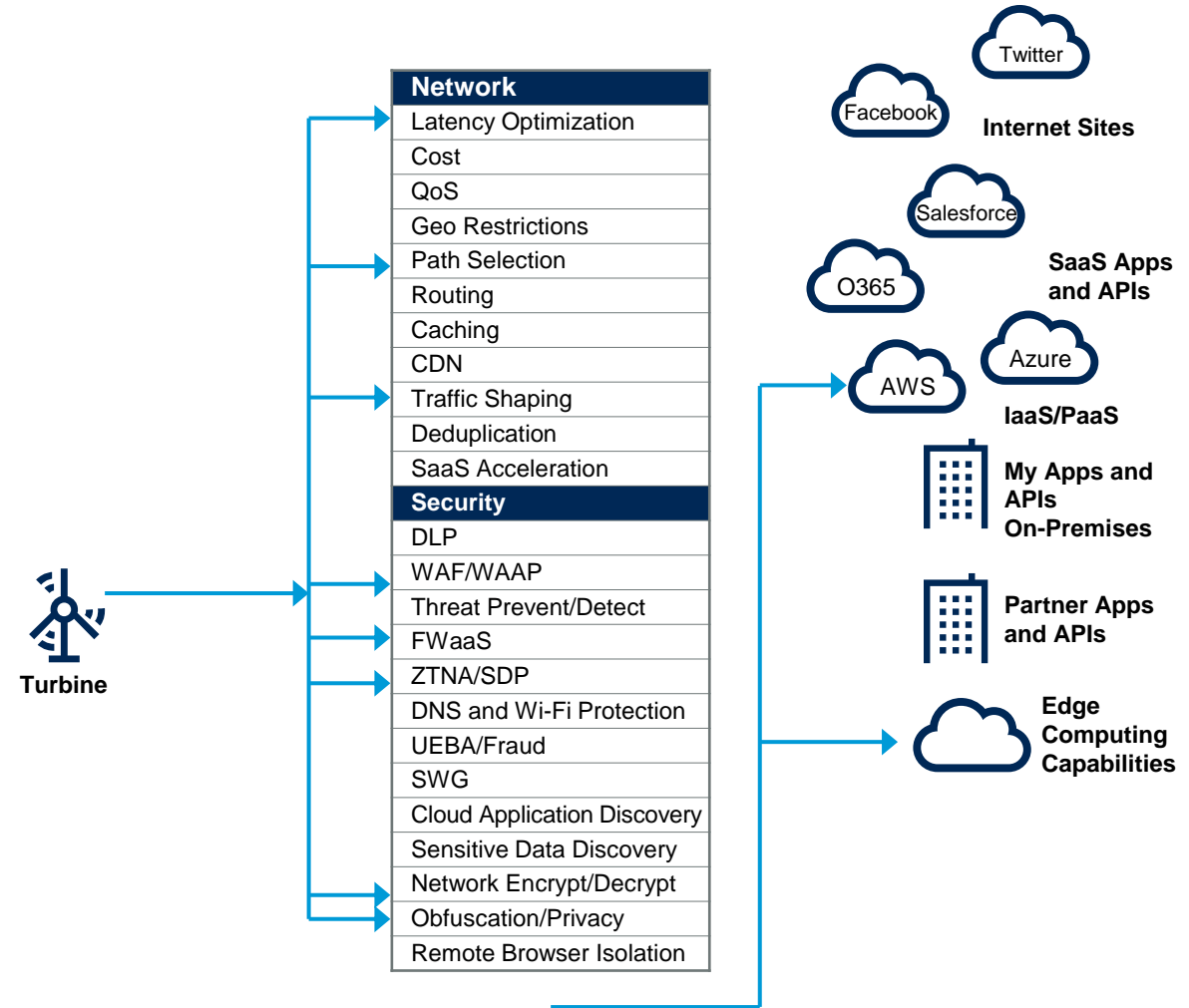
Jorge, a Contractor

- Access to an enterprise web-enabled app
- Hosted on-premises
- Unmanaged device



Wind Turbines

- Local network and compute access
- Data analytics on sensor data
- Then stream telemetry to Amazon Web Services (AWS)
- Need to obscure the location of the turbines



On-Premises Footprint Still Needed, but Smaller. Transition to a Thin Branch Model

Heavy Branch

Router
VPN
FW
WOC
SWG
DLP

1. Design principle:
In the cloud if you can,
on-premises if you must
2. SD-WAN + Security =
Best mix of performance,
availability and cost

Thin Branch

SD-WAN/FW
Simple WOC

Heavy Cloud

CASB
FWaaS w/IPS
ZTNA/SDP
SWG
DLP
Threat
VPN
WAAPaaS
Sandbox
RBI

SASE Will Be a Key Enabler of Edge Computing

- Latency sensitive — AR
- Lightweight endpoints — Sensors
- Untrusted endpoints — Third-party devices



Polling Question 2 of 3

Does your organization have plan to adopt SASE services by the end of 2022?

- A. no plan yet, still in considering**
- B. no plan yet, no interest in SASE**
- C. have plan to adopt in 2022, identifying vendors**
- D. have plan to adopt, but not date yet**
- E. I am a provider, not end user**

How to participate in our polling

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The poll question is on the “Vote” tab.

Please click the box to make your selection.

Upon voting you will see the results.

Thank you!

Ask a question

Attachments

Vote

Rate this

Details

Q. Polling Question
(please choose 1 answer)

A. Answer	<input type="checkbox"/>
B. Answer	<input type="checkbox"/>
C. Answer	<input type="checkbox"/>
D. Answer	<input type="checkbox"/>
E. Answer	<input type="checkbox"/>

Key Issues

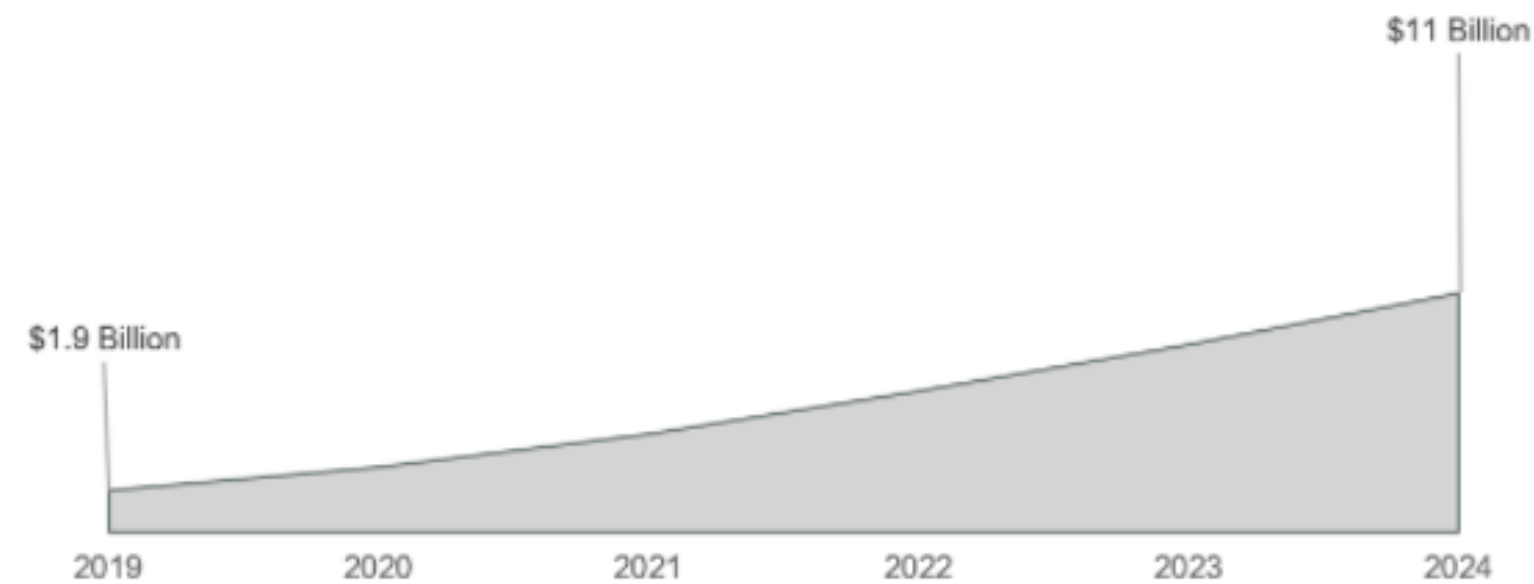
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SASE Revenue Forecast

SASE Revenue Forecast (End-User Spend), Worldwide, 2019-2024

Five-Year Market Growth = \$9.045 Billion (CAGR 42%)

Worldwide Market Revenue, 2024 = \$10.958B



Greater China \$769
Emerging APAC \$573
Mature APAC \$987

Gartner Inquires in China

	SD-WAN	SWG	ZTNA	FWaaS
Inquiry volume from 1 January 2020 to 5 September 2020 versus the volume in 2019 full year	More than 120%	More than 200%	More than 250%	More than 200%

Multinational Companies is the community inquiring the most for SASE China Offerings

SASE Services – Worldwide

Core features:

- SD-WAN
- SWG
- CASB
- ZTNA
- FWaaS (w/IPS)
- Identity sensitive data and malware
- Line rate operation

Recommended:

- Web application and API protection (WAAP)
- Remote browser isolation (RBI)
- Recursive DNS
- Network sandbox
- API-based access to SaaS for data context, and
- Support for managed and unmanaged devices

Optional:

- Wi-Fi hot spot protection
- Network obfuscation or dispersion
- Legacy VPN
- Edge compute protection

SASE Services – China

	Core Capabilities	Recommended Capabilities	Optional Capabilities
Products	<ul style="list-style-type: none">■ SD-WAN■ SWG■ ZTNA■ FWaaS■ Latency Optimization	<ul style="list-style-type: none">■ CASB■ Mobile SDK■ WAAP■ DNS Protection■ RBI■ Sandbox■ DLP■ CDN■ Support for Managed and Unmanaged Devices■ Professional Services	<ul style="list-style-type: none">■ Wi-Fi Hot Spot Protection■ Legacy VPN■ Edge Computing
<p>CDN = content delivery network RBI = remote browser isolation SDK = software development kit WAAP = web application and API protection</p>			

What Does a Cloud-Native SASE Mean?

- Software-based, hardware-neutral
- Scale out and back as needed
- Containers-/Microservices-based
- Globally distributed points of presence
- In-line encryption/decryption that scales
- Single pass scanning for malware/sensitive data
- Ideally, multitenant by design

SASE Providers Landscape in China

- Most worldwide vendors are US providers and they are hesitated to enter China market due to ongoing Geopolitical impacts
- Bridge SASE traffic from mainland China to HK PoP is workaround. For example, ViewQwest works with China Mobile to bridge traffic to Prisma Access at HK of Palo Alto Networks. However, China Cybersecurity Law restricts sensitive data cross-border movement
- Most well-known Chinese networking and security vendors have not launched SASE offerings – but it does not mean they are not working on this
- Local Vendor example- Sangfor

Worldwide Sample Vendor Landscape

- Akamai
- Cato Networks
- Cisco
- Cloudflare
- Forcepoint
- Fortinet
- McAfee
- Open Systems
- Bitglass
- Netskope
- Palo Alto Networks
- Proofpoint
- Broadcom-Symantec
- Versa Networks
- VMware
- Zscaler
- Sangfor

Polling Question 3 of 3

If you are a provider and plan to develop your SASE offerings, do you have a product strategy in place?

- A. no plan to develop SASE offerings
- B. have plan, but no product strategy yet
- C. have plan and established product strategy for SASE
- D. have plan and is building product strategy
- E. I am an end user, not a provider

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Q. Polling Question

(please choose 1 answer)

A. Answer

☐

B. Answer

☐

C. Answer

☐

D. Answer

☐

E. Answer

☐

Recommendations

- ④ Position SASE as a digital business enabler in the name of speed and agility.
- ④ Architect to move inspection engines to the sessions, not to reroute the sessions to the engines.
- ④ Stop managing boxes — Shift to delivering policy-based security services.
- ④ Your digital business is following these macro-IT trends, make sure you too.
- ④ Use SD-WAN and MPLS offload projects as a catalyst to evaluate integrated network security services.
- ④ Reduce complexity now on the network security side by moving to one vendor for SWG, (CASB), DNS, ZTNA and remote browser isolation capabilities.
- ④ For providers interesting to develop SASE offerings, a viable product strategy is the first step.

Ask your questions



The image shows a web interface for asking questions. At the top, there is a horizontal navigation bar with four tabs: 'Ask a question', 'Attachments', 'Rate this', and 'Details'. The 'Ask a question' tab is highlighted with an orange border, and an orange arrow points to it from the left. Below the tabs, the heading 'Ask a question' is displayed. Underneath the heading is a large text input area with a placeholder text 'Type your question here...'. At the bottom right of the form, there is a 'Send Question' button, which is also highlighted with an orange border and an orange arrow points to it from the left.

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