2022 SASE Market Trends Study:
Benefits Exceed Expectations in Security and Remote Connectivity

Having spent the last couple of years accelerating the pace of innovation by adopting digital transformation technologies, IT leaders are now looking to capitalize on that work. A crucial part of that effort means ensuring that employees have consistent, secure network access to any resource from any location — including home offices.

New research from Masergy, Fortinet, and CIO finds that IT leaders are counting on secure access service edge (SASE) to deliver on that goal. SASE combines networking functions, including software-defined wide-area network (SD-WAN), with network security capabilities. The survey of 200 IT directors and leaders in higher positions at large companies (at least $250 million in revenue and an average of $2.4 billion) finds that the benefits that users are getting from SASE — including improved security, support for remote workforces, and increased network agility — exceed even their own expectations.

To maximize the benefit, respondents made clear, they want simplicity in their SASE offerings, with numerous capabilities — including artificial intelligence — delivered on a common platform.

Fulfilling that requirement takes a partnership between a network service provider with proven SD-WAN performance and experience and a security provider with a fabric capable of integrating all required security components.

SASE drivers in the enterprise

SASE combines numerous capabilities that companies increasingly find crucial in supporting distributed workforces, including SD-WAN services, cloud access security broker (CASB), firewall as a service (FWaaS), secure web gateway (SWG), and zero-trust network access (ZTNA).

Nearly half (48%) of the survey respondents had either already adopted SASE or were in the process of transitioning, whereas the remainder had plans to adopt it (36%) or were investigating SASE (16%).
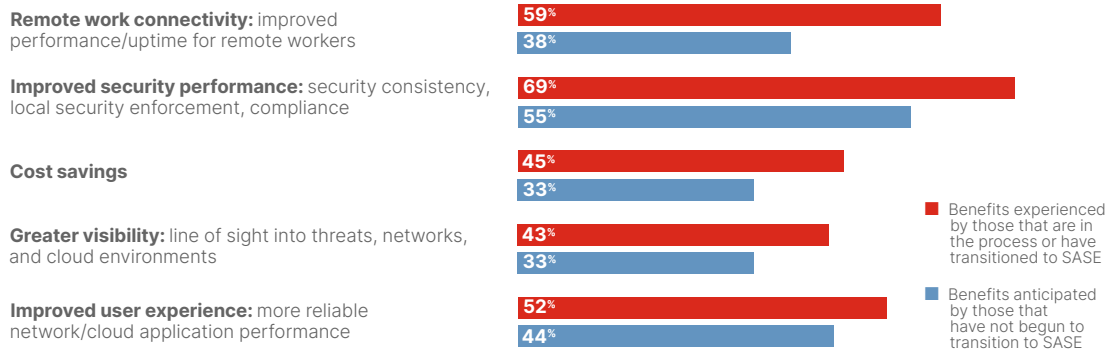
Underpinning interest in SASE is the requirement to converge security and networking functions, which nearly all the respondents (98%) reported was either critical (56%) or very important (42%).

"It's about the need for consistent networking and security from any location, accessing any resource for enhanced user experiences and better business outcomes," said Jonathan Nguyen-Duy, VP and global field CISO at Fortinet, which sponsored the survey, along with Masergy.

Indeed, nearly all the respondents (94%) said the need to make remote work sustainable for the long term has accelerated their interest and investment in SASE.

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FIGURE 1

SASE exceeds expectations: Anticipated benefits versus experienced benefits

Remote work connectivity: improved performance/uptime for remote workers
- 59%
- 38%

Improved security performance: security consistency, local security enforcement, compliance
- 69%
- 55%

Cost savings
- 45%
- 33%

Greater visibility: line of sight into threats, networks, and cloud environments
- 43%
- 33%

Improved user experience: more reliable network/cloud application performance
- 52%
- 44%

■ Benefits experienced by those that are in the process or have transitioned to SASE

■ Benefits anticipated by those that have not begun to transition to SASE

94%

of the respondents said the need to make remote work sustainable has accelerated their interest in SASE adoption.

Specifically, respondents said the top four challenges driving their interest in SASE were:

- Cloud security and visibility into and control of cloud environments (**52%**)

- Innovation, including cloud application migration and artificial intelligence (**44%**)

- Security strategy, including implementing zero trust (**41%**)

- Network security, removing connectivity barriers without jeopardizing security (**36%**)

"IT leaders need to balance priorities, protecting the user experience yet also satisfying security requirements," said Franz Chavez, vice president, Solutions Engineering at Masergy, now part of Comcast Business. "This makes SASE a compelling solution, because it can achieve both at the same time."

SASE benefits: reality exceeds expectations

It's clear from the survey results that SASE is living up to its promise.

Across five categories, respondents whose organization has implemented SASE reported that it has exceeded their expectations *(see Figure 1)*.

One of the widest margins came in a category that is at the very core of SASE: improved security performance. Among the respondents, 55% had expected benefits in that regard, and a whopping 69% reported having realized them, including security consistency, policy enforcement, and compliance. That data point is even more compelling when you consider that nearly three-quarters of the respondents (72%) said they had measured the success of a SASE solution based on improved security and compliance.

Improved performance stems from the alignment of SD-WAN, a security fabric powered by artificial intelligence (AI), and cloud services that SASE brings, Fortinet's Nguyen-Duy said. "As performance scales, both networking and security need to scale with it," he said. "In that way, neither SD-WAN nor security infrastructure becomes a bottleneck."

Remote work connectivity was also notable. Among the respondents, 38% said they had expected benefits in terms of improved performance and uptime for remote workers and 59% said SASE had delivered those benefits.
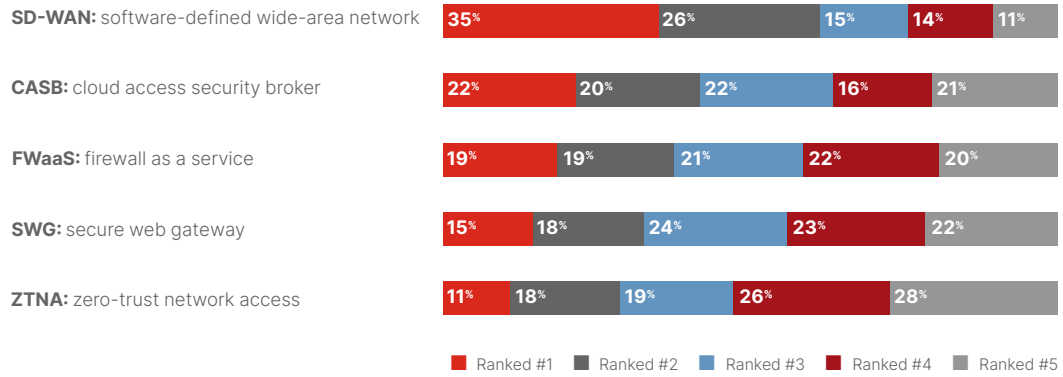
"Expectations are often surpassed, because bandwidth is the new corporate real estate and advanced analytics tools are the ideal early warning system," Chavez said. "SD-WAN and SASE solutions, with their sophisticated methods for mitigating contention for bandwidth, can be highly effective at preserving employee productivity." SASE includes tools that give IT real-time visibility into what's happening inside complex network environments and the ability to govern bandwidth at a granular level to control traffic flow.

Cost savings was also something of an unexpected benefit. Although only one-third of the respondents had expected any savings from SASE, nearly half (45%) said SASE is delivering exactly that.

Such savings may come from various sources. SD-WAN often cuts costs, especially when companies transition from private to hybrid (public and private) network services, Chavez said. Blending various security capabilities can likewise mean savings over buying separate software, hardware, and services.

FIGURE 2

Importance of SASE capabilities

Capability	Ranked #1	Ranked #2	Ranked #3	Ranked #4	Ranked #5
SD-WAN: software-defined wide-area network	35%	26%	15%	14%	11%
CASB: cloud access security broker	22%	20%	22%	16%	21%
FWaaS: firewall as a service	19%	19%	21%	22%	20%
SWG: secure web gateway	15%	18%	24%	23%	22%
ZTNA: zero-trust network access	11%	18%	19%	26%	28%

■ Ranked #1 ■ Ranked #2 ■ Ranked #3 ■ Ranked #4 ■ Ranked #5

75% will use an MSP for some or all of their ongoing SASE management.

Challenges with SASE adoption

As with any IT endeavor, respondents did note, they face some challenges in implementing SASE, although none are pervasive, with far fewer than half of the survey participants citing any single one. The challenges are also quite varied, with only a 5% difference between the most frequently cited challenge and the least.

The top challenges include implementing and integrating the solution, cited by 41% of the respondents. Providing the necessary IT expertise, best practices, and training was tied for second, at 40%, with eliminating system fragmentation, consolidating tools, and avoiding silos.

Nearly all of these challenges point to a common theme: IT teams need help implementing SASE. It's not surprising, then, that more than six in 10 (63%) of the respondents had used or will use managed service providers (MSPs) for SASE deployment and 75% will use an MSP for some or all of their ongoing SASE management.

Given that security is a key component of SASE, getting help makes sense, especially when you consider the challenges inherent in delivering security for users who may not always be connected to a network, Fortinet's Nguyen-Duy said.

"There's a saying that security shouldn't be a do-it-yourself exercise. As security has become more complex and you integrate networking into it, it is absolutely not a DIY exercise," he said. "All the traditional challenges of complexity, expense, and skill sets are accelerated by Industry 4.0 and digital transformation. That's driving enterprises of all sizes to service providers like Masergy."

Outlining provider selection criteria

As they seek out help with SASE, most of the survey respondents noted, SD-WAN is the most important capability, with nearly two-thirds rating it as either No. 1 (35%) or No. 2 (26%) on a five-point scale. Other key capabilities, as shown in Figure 2, include cloud access security broker (CASB), firewall as a service (FWaaS), secure web gateway (SWG), and zero-trust network access (ZTNA).

"SD-WAN is viewed as the next generation of routing technology as well as the primary tool set enabling companies to achieve the goal of combining networking and security organically, rather than piecemealing them together," Masergy's Chavez said.

As for the most important criteria by which they evaluate SASE solutions, provider trust and flexibility/interoperability tied for the top spot, cited by nearly half of the respondents:

- Provider trust – **49%**
- Flexibility/interoperability – **49%**
- Tech stack and platform – **46%**
- Ability to address specific needs and use cases – **43%**
- Deployment model: managed vs. DIY – **43%**

Another question delved deeper into SASE preferences by asking the respondents how important value-added features were to them. The top responses included:

- Network security – **91%**
- Endpoint security protections – **91%**
- Flexibility for cloud-based or on-premises deployment – **91%**
- Integration with existing security technologies – **90%**
- 24×7 security operations center (SOC) – **89%**
- Shadow IT discovery – **89%**

A desire for simplicity and AI

Respondents also put a premium on simplicity and consolidation in terms of how SASE is delivered.

Nearly all (95%) said it's important that their SASE solution be built on a common platform, and 87% prefer a solution that involves three or fewer vendors. In answer to a separate question, 91% of the respondents said that it was critical or very important that their SASE solution include artificial intelligence capabilities.

"What's abundantly clear is IT leaders often have too many technologies and vendors to manage effectively," Chavez said. "SASE reduces that complexity, by bringing more functions, tools, and providers under a single umbrella."

Applying AI enables companies to analyze the vast amounts of data their network and security tools generate. When AI and SASE work together, IT leaders can make effective decisions based on broader insights without reconciling disparate data feeds — all from a single dashboard.

"By analyzing massive volumes of network data, using AI, we can enhance detection and analysis of issues across the LAN, WAN, data center, and cloud network edges to deliver consistent network performance," Nguyen-Duy said. The same applies to security. "Leveraging AI for data-driven decision-making, you have enhanced accuracy, detection, and mitigation at speed and scale." Working together, AI helps optimize network and security performance for better experiences and outcomes.

"What's now coming into focus is the perfect marriage of SASE and AI in delivering the key elements needed to build the self-healing, autonomous networks of the future," said Chavez. "To automate IT functions, AI engines need observable data flows, control over security and network functions, and a modern IT infrastructure. SASE delivers on all three."

Masergy and Fortinet: a formidable combo

IT leaders are counting on SASE to help them further their digital transformation efforts by ensuring that they can deliver consistent, high-performance network and security services to employees, no matter where they may be located. The CIO survey makes clear that they also want a SASE provider that offers all the features and functions they require in an integrated platform that's simple to use.

Fortinet and Masergy have partnered to deliver just that. Both companies have long been focused on the integration of networking and security. Fortinet's Forti-OS provides a common operating system that integrates some 50 products to deliver consistency of performance, security, and automation capabilities out of the box. Acquired by Comcast Business in 2021, Masergy is a pioneer in software-defined networking, offering global SD-WAN and security solutions coupled with industry-leading service-level agreements and exceptional service experiences.

Together, the companies are a powerhouse combination where your network platform is also your security platform.

Fortinet and Masergy uniquely converge networking, security, and services into one solution, uniting the power of Fortinet Secure SD-WAN solutions with 24×7 network and security management services from Masergy. That makes for a simplified SASE solution with one provider, one dashboard, unified security policies, and centralized orchestration. Ultimately, that means better business outcomes for your enterprise.

Learn more about how the combination of Fortinet and Masergy can deliver SASE services that provide both the network performance and the security your enterprise needs.

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