

Magic Quadrant for Single-Vendor SASE

Published 16 August 2023 - ID G00785023 - 21 min read

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The single-vendor SASE market is immature and dynamic, but developing rapidly. I&O leaders responsible for networking should work with their security colleagues when selecting SASE vendors and use this research to cut through marketing hype to determine which vendors are best-suited to their needs.

Strategic Planning Assumptions

- By 2025, there will be over a 50% increase in the number of vendors with generally available single-vendor SASE offerings, compared to mid-2023.
- By 2026, 60% of new SD-WAN purchases will be part of a single-vendor SASE offering, up from 15% in 2023.

Market Definition/Description

This Magic Quadrant for Single-Vendor SASE is the first version of this Magic Quadrant. It replaces the [Market Guide for Single-Vendor SASE](#).

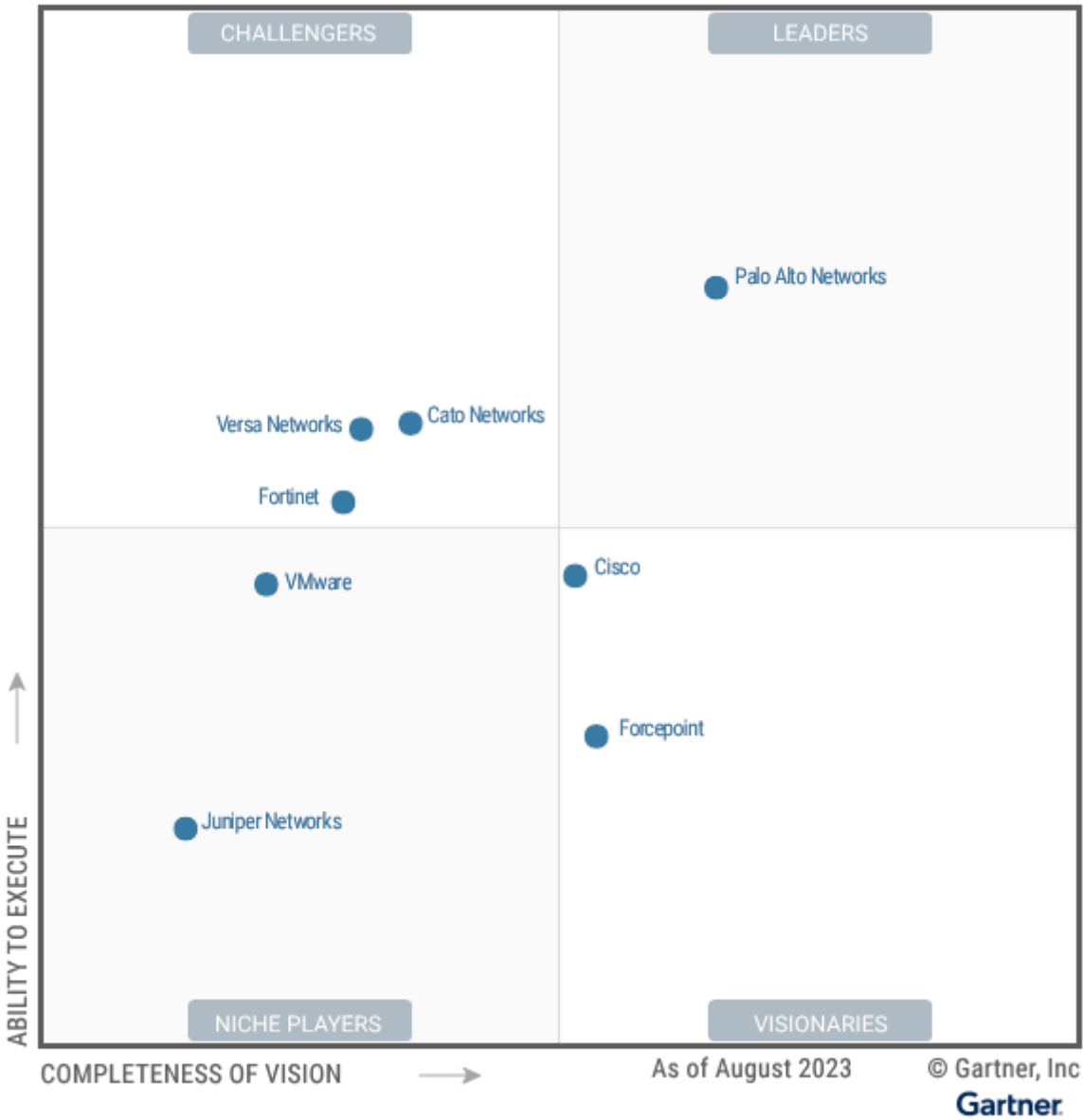
Gartner defines single-vendor secure access service edge (SASE) offerings as those that deliver multiple converged-network and security-as-a-service capabilities, such as software-defined WAN, secure web gateway, cloud access security broker, network firewalling and zero trust network access. These offerings use a cloud-centric architecture and are delivered by one vendor.

SASE supports branch office, remote worker and on-premises general internet security, private application access and cloud service consumption use cases.

Magic Quadrant

Figure 1: Magic Quadrant for Single-Vendor SASE





Vendor Strengths and Cautions

Cato Networks

Cato Networks is a Challenger in this Magic Quadrant. Its primary offering in this market is Cato SASE Cloud, which is a unified SASE platform. Its operations are mostly focused in North America, Europe and Asia, and its SASE customers tend to be enterprises, and small and midsize businesses (SMBs) across all verticals. We expect the vendor to make future investments in this market, including addressing adjacent security functions, and enhance support for Internet of Things (IoT)/operational technology (OT).

Strengths

- The Cato SASE Cloud user interface is simple and intuitive, and addresses all product functionality via a single console.
- Cato’s customers, via multiple sources including reference surveys, Gartner Peer Insights and client inquiry, report excellent overall customer experience.
- Cato was a pioneer in this market and helped to drive and shape customer expectations.

Cautions

- Cato's offering lacks certain capabilities around SaaS control and visibility, data security, and SD-WAN features locally on its appliance, compared to other vendors in this research.
- Cato's go-forward sales and geographic strategies are limited, which can restrict its ability to grow in the market.
- Cato's planned product innovations are unlikely to disrupt or shape the broad enterprise market, as they're more aligned with midmarket and SMB customers' needs.

Cisco

Cisco is a Visionary in this Magic Quadrant. Its primary offering in this market is Cisco+ Secure Connect integrated with Cisco Meraki SD-WAN. In addition, the vendor also offers Umbrella Secure Internet Gateway (SIG) integrated with both Cisco Catalyst SD-WAN and Cisco Meraki SD-WAN to create additional single-vendor SASE offerings. The vendor also positions Duo for specific requirements. Cisco's operations are geographically diversified, and its SASE customers tend to be SMBs and enterprises across all verticals. We expect the vendor to make future investments in this market, focused on expanding the POP footprint for Cisco+ Secure Connect and making comprehensive enhancements to its cloud-delivered security portfolio.

Strengths

- Cisco provides strong threat intelligence capabilities across its multiple offerings.
- Cisco provides very cost-effective pricing in this market for its primary offering (Cisco+ Secure Connect integrated with Cisco Meraki SD-WAN), compared to other vendors.
- Cisco's product roadmap is well-aligned with emerging enterprise customer needs and has strong potential to shape and drive the market.

Cautions

- Cisco positions multiple options for different use cases, which increases the number of consoles needed if your requirements span multiple use cases. It also increases the likelihood of a suboptimal deployment and/or limits investment protection as customer requirements change.
- As of April 2023, Cisco's POP footprint for Cisco+ Secure Connect was limited geographically.
- Cisco has been less responsive in this market compared to others in this research in terms of delivering a unified experience with comprehensive security in a timely manner.

Forcepoint

Forcepoint is a Visionary in this Magic Quadrant. Its primary offering in this market is Forcepoint ONE integrated with FlexEdge Secure SD-WAN. Its operations are in North America, South America, Europe and Asia, and its SASE customers tend to be enterprises across all verticals. We

expect the vendor to make future investments in this market, focused on unifying all networking and security functionality via a single management console.

Strengths

- Forcepoint has very strong security capabilities including web proxy, SaaS control/visibility, and data security, combined with a robust POP infrastructure.
- Forcepoint has a strong go-forward marketing and sales strategy, which should help it grow in the market.
- Forcepoint's product roadmap is well-aligned with customer enterprise requirements.

Cautions

- Forcepoint's customers, via multiple sources including reference surveys, Gartner Peer Insights and client inquiry, report lower customer experience compared to other vendors in this research.
- Customers have limited awareness of Forcepoint in this market, including among its existing installed-base, which can impact its ability to grow.
- There is limited financial information available about the vendor, which creates uncertainty over its long-term viability in this market compared to other vendors.

Fortinet

Fortinet is a Challenger in this Magic Quadrant. Its primary offering in this market is the integration of FortiSASE with FortiGate Secure SD-WAN, managed by FortiManager. The vendor also positions FortiCASB, FortiMonitor, FortiIsolator and FortiWeb for specific requirements. Its operations are geographically diversified, and its SASE customers tend to be enterprises and SMBs across all verticals. We expect the vendor to make future investments in this market, focused on simplifying licensing and expanding its POP footprint.

Strengths

- Fortinet has strong branch networking and branch network security capabilities delivered via FortiGate appliances.
- Fortinet provides highly cost-effective offerings, compared to other vendors.
- Fortinet has strong corporate financial viability and well-established global channels. This reduces risk of purchasing from the vendor, which is particularly important in this market as multiple functionalities are converged.

Cautions

- Fortinet requires multiple products including FortiManager, FortiSASE, FortiGate, FortiIsolator, FortiMonitor and others to address multiple use cases, which requires customers to administer multiple components.

- Fortinet's POP footprint is limited geographically compared to other vendors.
- Fortinet was late to market with the integration of FortiSASE with FortiGate SD-WAN, which is its core offering in this market.

Juniper Networks

Juniper is a Niche Player in this Magic Quadrant. Its primary offering in this market is the integration of Juniper Secure Edge with AI-driven SD-WAN. Its operations are mostly focused in North America and Europe, and its SASE customers tend to be large enterprises across all verticals. We expect the vendor to make future investments in this market, focused on addressing adjacent security functions.

Strengths

- Juniper's offering provides solid branch firewalling and SD-WAN functionality.
- Juniper's offering provides strong secure web access and data security functionality.
- Juniper has a large installed-base of existing networking and security customers to cross-sell into, which increases its viability and growth potential in this market.

Cautions

- Compared to other vendors in this market, Juniper has a small installed-base of single-vendor SASE customers and limited visibility, and is new to both the SASE and security services edge (SSE) markets.
- Juniper's POP infrastructure lags competitors in this research in terms of geographic distribution, availability or a public status page and public SLAs.
- Compared to other vendors in this market, Juniper's pricing is very expensive.

Palo Alto Networks

Palo Alto Networks is a Leader in this Magic Quadrant. Its primary offering in this market is Prisma SASE, which is a unified SASE platform. Its operations are geographically diversified, and its SASE customers tend to be enterprises across all verticals. We expect the vendor to make future investments in this market focused on improving operational efficiency via AI and conversational interfaces.

Strengths

- The vendor's SASE offering provides solid functionality via a single, straightforward user interface.
- Palo Alto Networks' go-forward product roadmap and planned innovation investments are well-aligned with emerging enterprise customer needs and have strong potential to shape and drive the market.

- Palo Alto Networks has a large and loyal installed-base that should help the vendor grow in this market.

Cautions

- Customers using Panorama and/or PAN-OS-based products have expressed frustration because they need a separate management platform to use Prisma Access features. In addition, this platform does not fully manage their existing firewall estate.
- Based on feedback from clients and Gartner's analysis, the vendor's pricing is much higher than others.
- The vendor lacks a native remote browser isolation (RBI) capability, and has very limited support in its UI and documentation for non-English languages.

Versa Networks

Versa Networks is a Challenger in this Magic Quadrant. Its primary offering in this market is Versa Secure Access Fabric (VSAF), which is a unified SASE platform. The vendor also positions Titan as a secondary offering for specific use cases, including price-sensitive customers looking for a smaller set of features. Its operations are in North America, Europe and Asia, and its SASE customers tend to be midsize enterprises across all verticals. We expect the vendor to make future investments in this market focused on enhancing its digital experience monitoring (DEM) and extending to support more mobile use cases.

Strengths

- VSAF provides all functionality via a single, unified console.
- Versa provides robust SD-WAN functionality.
- Versa was an early mover in the market and is heavily focused and committed to it.

Cautions

- Versa's threat detection capabilities lag other vendors in this research.
- Versa's sales strategy is limited compared to other vendors in this market, which can impact its ability to grow in the market.
- Versa's product roadmap and planned investments are less likely to drive, shape or disrupt the market compared to other vendors in this research.

VMware

VMware is a Niche Player in this Magic Quadrant. Its primary offering in this market is VMware SASE. The vendor also positions Workspace ONE for specific requirements. Its operations are geographically diversified, and its SASE customers tend to be enterprises across all verticals. We expect the vendor to make future investments in this market, including enhancing its private backbone to improve application performance.

Broadcom announced its intention to acquire VMware on 26 May 2022. At the time of this evaluation, however, Broadcom and VMware operate as separate entities. Gartner will provide further insight as more details become available.

Strengths

- VMware's customers, via multiple sources including Gartner Peer Insights and client inquiry, report excellent overall customer experience.
- VMware provides strong SD-WAN functionality.
- VMware provides cost-effective pricing in this market, compared to other vendors.

Cautions

- VMware's offering lags competitors in security functionality, including SaaS control/visibility and data security.
- To address advanced security use cases, Workspace ONE is required, which is another product and console to administer.
- VMware's planned product enhancements are unlikely to disrupt or shape the broader enterprise single-vendor SASE market. The pending Broadcom acquisition did not factor into this analysis.

Inclusion and Exclusion Criteria

General:

- Provide a generally available (GA) single-vendor SASE offering as of 12 April 2023. All components must be publicly available, shipping and be included on the vendors' published price list as of this date. Products shipping after this date and any publicly available marketing information may only have an influence on the Completeness of Vision axis.
- Provide commercial support and maintenance for its enterprise SASE offering (24/7) to support deployments on multiple continents. This includes hardware/software support, access to software upgrades, security patches, troubleshooting and technical assistance.
- Participate in the enterprise SASE market, including actively selling and publicly marketing SASE to enterprises.

Gartner defines "general availability" as the release of a product to all customers. When a product reaches GA, it becomes available through the company's general sales channel – as opposed to a limited or controlled release, or beta version, used primarily for testing and user feedback purposes.

Product

Vendors must have a SASE offering that includes all the following functionality, generally available as of 12 April 2023:

- The ability to secure web access via proxy.
- The ability to enforce SaaS access controls in-line. This requires support for in-line malware scanning and data security to cover at least three SaaS enterprise suites (e.g., M365, Salesforce, Google Workspace).
- The ability to provide identity- and context-based secure remote policy-based access to private applications (not network-level access), often referred to as zero trust network access (ZTNA).
- All of the above functionalities must be operated as a service and primarily delivered as a cloud service to customers.
- Firewall capability to secure traffic bidirectionally across networks.
- A branch appliance that supports: dynamic traffic steering out multiple physical locally attached WAN interfaces; management/administration of traffic steering based on well-known applications (not IPs/ports); and be deployed at a customer's physical branch location to support direct WAN connectivity.
- Centralized management for the offering (with both GUI and API) that provides reporting and troubleshooting, and allows for granular configuration and policy changes.
- The ability for customers to directly manage and administer the full offering themselves, including granular configuration and policy of all SASE functions (commonly referred to as do it yourself [DIY]).
- Single-pass scanning for malware/sensitive data (may be parallelized).
- Support single sign-on (SSO) integration with third-party identity providers.
- Have at least three POPs on two continents each. A POP must be in a highly secure facility; offer a full suite of SASE services locally (intra-POP), including firewall, web proxy, private access, and in-line SaaS control in a highly available fashion; and be generally available to all enterprise customers.

Global Customer Relevance and Adoption

Vendors must show relevance to Gartner clients via achieving the following as of 12 April 2023:

- At least 100 unique enterprise customers that have purchased and deployed the vendor's primary SASE offering in a production environment and are under an active commercial support license.
- At least 25 unique SASE customers, headquartered in two continents, under active support contracts; for example, 25 customers in Asia and 25 separate customers in North America.

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Low
Marketing Execution	Medium
Customer Experience	High
Operations	NotRated

Source: Gartner (August 2023)

Completeness of Vision

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	Medium
Marketing Strategy	Low
Sales Strategy	Medium
Offering (Product) Strategy	High

Evaluation Criteria ↓	Weighting ↓
Business Model	NotRated
Vertical/Industry Strategy	NotRated
Innovation	High
Geographic Strategy	Low

Source: Gartner (August 2023)

Quadrant Descriptions

Leaders

A Leader has the ability to address current and future end-user requirements in the single-vendor SASE market. Leaders have strong offerings that address multiple use cases via a unified platform that provides a single, straightforward, and easy-to-use administrative interface. A Leader's strategy is aligned with emerging user needs, and has the potential to drive, shape and transform the market going forward. A Leader typically has strong visibility in the market, a large installed-base of customers, and maintains positive relationships with its customers and partners on a global basis. A Leader typically is increasing its investments in the single-vendor SASE market.

Challengers

A Challenger has the ability to address current end-user requirements in the single-vendor SASE market. A Challenger typically has good visibility and/or a large installed-base of customers. Challengers typically have solid offerings that address multiple use cases. However, a Challenger's strategy may not shape and transform the enterprise market going forward.

Visionaries

Visionaries often help transform the market – from driving new ideas/innovations, including new business models, to solving enterprise challenges. While Visionaries often have a strategy that is likely to disrupt, shape and transform the market, they typically lack visibility, a sizable installed-base, global coverage and/or comprehensive product capabilities to address all enterprise requirements today.

Niche Players

Niche Players are often focused on specific portion(s) of the market, such as a specific use case, geography, vertical or technological specialty. They have a viable product offering, but have not shown the ability to drive the broader market or maintain sustained execution in the broad enterprise market. A Niche Player typically has a near-complete single-vendor SASE offering, with some limitations that manifest outside of their core focus areas. These limitations often include feature depth, usability geographic reach, market visibility and installed-base. For example, a Niche Player may be focused on only certain use cases, geographies or evolving their existing installed-base. This focus can create limitations in the broader market, including reducing their ability to address emerging customer needs.

Context

The adoption of cloud and edge computing and work-from-anywhere initiatives has radically shifted access requirements. For most organizations, there are now more users, applications and data located outside of an enterprise than inside. Attempts to use traditional perimeter-based approaches to securing anywhere, anytime access have resulted in a patchwork of vendors, policies, consoles and complicated traffic routing, creating complexity for security administrators and users.

Network and network security leaders looking to support the anywhere, anytime access requirements of a distributed, hybrid workforce (including branch offices and edge locations) should invest in SASE. The rationale is that SASE can improve the end-user experience by enabling the same access to digital capabilities, regardless of their location or the location of the application they are accessing.

SASE can help organizations adopt a zero trust security posture by applying consistent identity- and context-based policies, regardless of the type of resource the user is accessing (i.e., internet, cloud services, private applications). Security policy management can be simplified by applying the same inspection mechanisms for sensitive data and malware across all access mechanisms and by shifting toward identity-centric policies rather than network location.

Market Direction

The market for single-vendor SASE (SVSASE) is evolving rapidly. We expect at least five (and as many as 10) new vendors to enter the market with a single vendor SASE offering over the next 18 months.

As hype around generative AI peaks, we expect several vendors will add AI-enabled policy creation and troubleshooting to improve operational experience. We also expect vendors to expand their offerings into logical adjacencies, including extended detection and response (XDR)/managed detection and response (MDR) monitoring, expanded endpoint security options, edge computing and east/west microsegmentation within campus and branch networks. As a result, we believe that in the next 18 months, more than 40% of SVSASE vendors will offer XDR or MDR services as an add-on to their platform. Also, we believe that over the next four years, over 25% of SVSASE offerings will expand to offer local compute options addressing edge computing scenarios.

We also see vendors leveraging their POPs for a native WAN backbone to provide more options to connect to the cloud and other enterprise locations. We also see potential for nonproduct innovations taking place in this market. Individually, networking and cloud security have two different consumption models that are basically “stapled together” today within SVSASE offerings. We envision a simpler, single SKU-consumption model within the next 18 months.

Market Overview

There are three primary options for SASE adoption — a single-vendor offering, explicit pairing of two vendors (one for network services and one for security services) and managed SASE. Single-vendor SASE is the exclusive focus of this research.

We estimate there are 7,500 enterprise single-vendor SASE customers. The market for well-architected single-vendor SASE offerings is immature, but developing quickly, and SASE interest among our clients has been growing rapidly. Multiple providers now have a single-vendor SASE offering (eight qualify for this research); but few offer the required breadth and depth of functionality with integration across all components, a single management plane, and unified data model and data lake.

We are seeing increased interest in single-vendor SASE from organizations that want to simplify their branch technology stacks. It is particularly compelling for organizations making SD-WAN investments and extending the project to include firewalling, remote access and other security capabilities. This trend has expanded to SSE as well, as many buyers will switch from a best-of-breed purchasing motion to a default position that a single vendor is preferred even if they aren't best of breed in all areas.

As a result, security and networking vendors have aggressively expanded their offerings to address single-vendor SASE. This has led to major investments including partnerships, organic development and external acquisitions such as

- Aryaka acquiring Secucloud
- Cloudflare and Zscaler launching branch appliances
- Check Point Software adding SD-WAN
- Cradlepoint acquiring Ericom
- Fortinet acquiring OPAQ
- HPE (Aruba) acquiring Axis Security
- Netskope acquiring Infriot
- Palo Alto Networks acquiring CloudGenix

We expect further developments from existing SD-WAN and SSE vendors to expand or accelerate their single-vendor SASE investments. Factoring in this with end-user demand, we expect that a

majority of SD-WAN new purchases and SSE new purchases after 2025 will be in the form of an SVSASE, even if a full SASE solution isn't initially deployed.

Evidence

Gartner analysts conducted over 2,500 interactions with Gartner clients on the topic of SASE in the 12-month period from 1 July 2022 through 30 June 2023.

All vendors in this research responded to a prequalification survey to help determine their relevance to enterprise clients.

All vendors in this research responded to an RFI regarding current and planned capabilities.

All vendors in this research submitted a video demonstration following a script to show specific product capabilities.

Gartner analysts reviewed relevant reviews from Gartner Peer Insights.

Reference customers from seven of eight vendors answered a questionnaire regarding their experience with the vendor's SASE product.

Social media analytics.

Gartner analysts reviewed publicly available information including blogs, product specification sheets and financial information.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase

awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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