



Everest Group SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024

Focus on Wipro
December 2024



Introduction

The Secure Access Service Edge (SASE) services market is undergoing rapid evolution, reshaping the enterprise security and networking landscape. The widespread adoption of cloud, the rise of a global hybrid workforce, and the rise of zero trust principles are accelerating the adoption of SASE services. This has led enterprises to prioritize the integration of network and security functions, enhance user experience, improve security posture, and simplify management. This new set of priorities is requiring SASE service providers to evolve. Leading service providers in the EMEA region are accelerating the development of their SASE offerings by enhancing internal capabilities, forming strategic technology partnerships, and creating proprietary tools and IPs. These efforts are underpinned by innovations in advanced technologies, including AI-driven threat detection, automation, and generative AI, aimed at enhancing the performance, reliability, and adaptability of SASE solutions.

In the research, we present an assessment and detailed profiles of 15 SASE providers featured on the [SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024](#). The assessment is based on Everest Group's annual RFI process for the calendar year 2024, interactions with leading SASE providers in EMEA, client reference checks, and an ongoing analysis of the SASE services market.

The full report includes the profiles of the following 15 leading SASE providers featured on the SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024:

- **Leaders:** Accenture, HCLTech, NTT DATA, and Wipro
- **Major Contenders:** BT Group, Capgemini, Colt Technology Services, DXC Technology, IBM, Kyndryl, Tata Communications, and Telefonica
- **Aspirants:** Coevolve, Open Systems, and SonicWall

Scope of this report

Geography: EMEA

Providers: 15

Services: SASE services

SASE services for EMEA Enterprises PEAK Matrix® characteristics

Leaders

Accenture, HCLTech, NTT DATA, and Wipro

- Leaders have significant enterprise mindshare in the EMEA region because of their end-to-end SASE services portfolio and well-established market presence
- They are continuously evolving their SASE offerings by investing in the development of proprietary IP, frameworks, accelerators, delivery capabilities, and strategic partnerships with technology providers
- Leaders are making substantial investments in next-generation technologies such as AI-driven network and security monitoring, AI-Ops based incident prediction and resolution, and gen AI-powered user interface to enhance overall performance, user experience, and reduce costs

Major Contenders

BT Group, Capgemini, Colt Technology Services, DXC Technology, IBM, Kyndryl, Tata Communications, and Telefonica

- Major Contenders have developed substantial capabilities to deliver SASE services, though their service portfolios lack the balance and comprehensiveness seen among market leaders, particularly in terms of coverage across SASE segments, geographies, and industries
- These providers are consistently creating internal IP and frameworks and expanding their service and technology partnership ecosystem to address existing capability gaps. These efforts position them as formidable challengers to the leaders in the SASE services market

Aspirants

Coevolve, Open Systems, and SonicWall

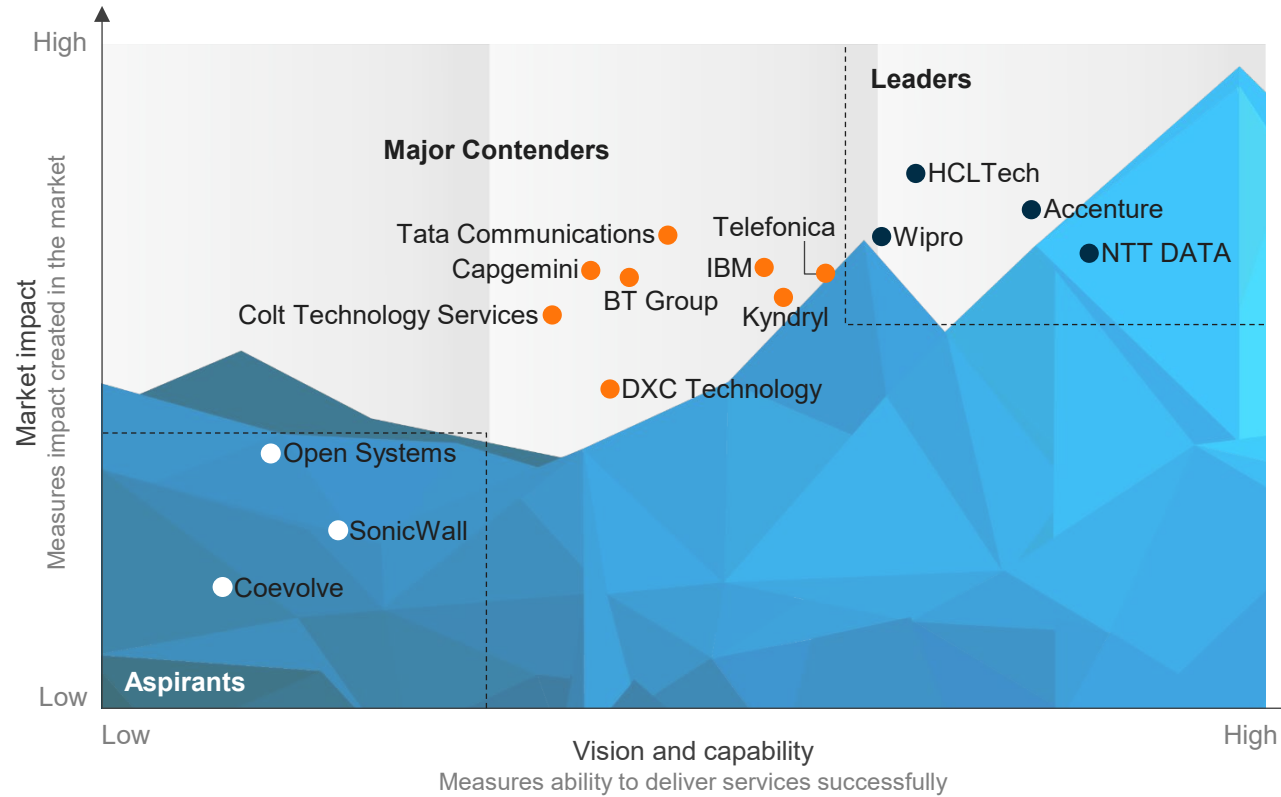
- Aspirants' SASE services business is still in the initial growth phase and currently does not serve large-scale or mega clients within the SASE services market
- These providers are actively expanding their SASE services capabilities, leveraging both service and technology partnerships as well as developing internal IP and frameworks

Everest Group PEAK Matrix®

SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024 | Wipro is positioned as a Leader

Everest Group SASE Services for EMEA Enterprises PEAK Matrix® Assessment 2024¹

- Leaders
- Major Contenders
- Aspirants



¹ Assessments for Accenture, BT Group, Capgemini, Coevolve, Open Systems, and SonicWall excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with the buyers
Source: Everest Group (2024)

Wipro profile (page 1 of 6)

Overview

Vision for SASE services

Wipro aims to create a secure and efficient global network by partnering with leading SASE providers to develop integrated solutions powered by automation and AI. Its strategy includes promoting these offerings through multiple channels, providing a clear IT modernization roadmap via SASE, and establishing an end-user experience center to showcase capabilities. Additionally, Wipro focuses on building a skilled workforce to offer consulting, transformation, managed services, and support for key SASE vendors. It also has a strong emphasis on local presence and strong customer relationships in the EMEA region.

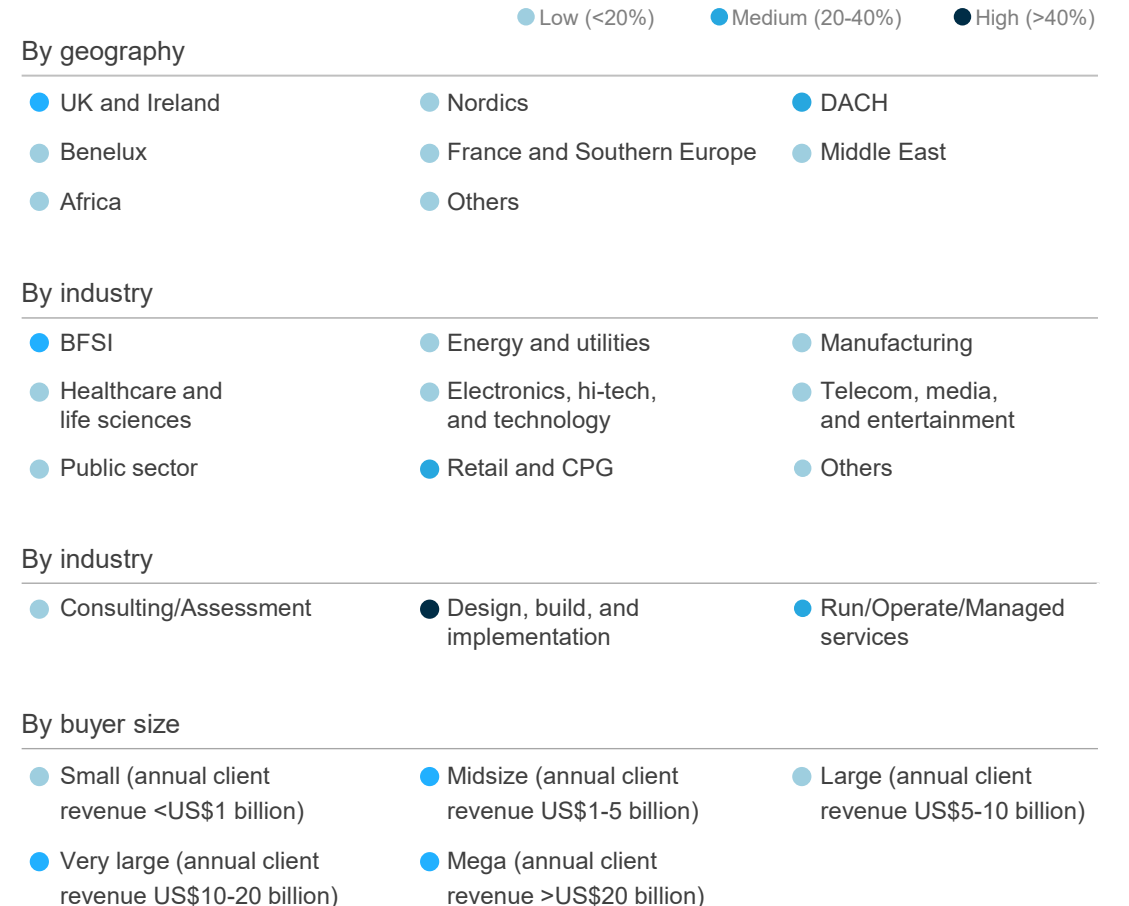
SASE services revenue for EMEA region (CY2023)

<US100 million	US\$100-250 million	US\$250-500 million	>US\$500 million
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Number of active clients for SASE services for EMEA region (CY2023)

<20	20-50	50-100	>100
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SASE services revenue mix (CY2023)



Wipro profile (page 2 of 6)

Solutions

[NOT EXHAUSTIVE]

Key proprietary solutions (IP/frameworks/accelerators/tools, etc., developed internally to deliver SASE services)

Solutions	Details
SMC AI platform	It provides an AI-powered security automation solution that utilizes a framework-driven approach, integrating network and security tools to analyze data through machine learning and AI for issue detection. It includes smart reporting via an interactive console, offering a comprehensive view of the security posture for Chief Information Security Officer (CISOs), along with dashboards to visualize risk and efficiency across people, processes, and technology. It enables auto-healing of issues by evaluating risks and rectifying policies, configurations, and endpoint compliance. Additionally, it facilitates intelligent security operations through automation platforms and bots, ensuring continuous reporting of issues while prioritizing them for tracking and remediation.
Automation bot library	It utilizes over 430 bots to detect misconfigurations, remediate those, and streamline implementations, ensuring optimized configurations to improve efficiency of Wipro's managed security services. Additionally, it leverages the digital experience modules from SASE vendors to enhance user experience and overall effectiveness of the security solutions provided.
Enterprise Network Defense #WANFreedom	It secures organizational perimeters using next-generation firewalls and integrates with Wipro's Security Management Center (SMC) for a unified compliance view. It is a comprehensive vendor-technology-agnostic SDWAN offering that covers the end-to-end life cycle from consult, design, and deploy to manage SDWAN adoption.
SASE-EDR Integration	It takes feeds from Endpoint Detection and Response (EDR) and makes changes to SASE policies. It provides a real-time demonstration of policy enforcement and policy definition as per zero trust principles.

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Partnerships

[NOT EXHAUSTIVE]

Partners	Details
Zscaler	They partnered as license resellers and took several initiatives such as consulting and transformation, including creating joint solutions with SASE vendors that incorporated automation and integration with other tools such as EDR and Wipro's internal automation platform, SMC AI. It invested in a customer experience lab to demonstrate SASE use cases covering zero-trust, enterprise SASE, cloud visibility, and control. It also prepared a joint solution along with flyers and brochures for external audiences and internal mailers as part of the go-to-market activity.
Palo Alto	It established an elite partnership, taking several initiatives, including the creation of joint solutions on strategic themes of tool rationalization, zero trust security, enterprise protection, SASE, and security operations. It set up a CoE lab to enhance resource skills through certification and training programs from vendors and established a customer user experience lab to showcase required use cases on ZTNA, SWG, DLP, CASB, and next-generation Security Operations Center (SOC). Additionally, it conducted podcasts and roadshows, made joint investments from vendors in the SDX lab, and worked on developing competency.
Cisco	It partnered with Cisco as a gold-certified partner to create joint solutions with SASE vendors that included automation and integration with other tools such as EDR and Wipro's internal automation tool, SMC AI. It established a CoE lab to enhance resource skills through certification and training programs from vendors. Additionally, it set up a customer user experience lab to showcase the required use cases and conducted podcasts and roadshows to promote these initiatives.
Netskope	It established an elite partnership, taking several initiatives, including the creation of joint solutions covering ZTNA, SASE, data protection, and digital experience management with SASE vendors that incorporated automation and integration with other tools such as EDR and Wipro's internal automation tool, SMC AI. It set up a CoE lab for SASE and ZTNA to enhance resource skills through certification and training programs from vendors and established a customer user experience lab to showcase required use cases. Additionally, it conducted podcasts and roadshows, made joint investments from vendors in the SDX lab, and worked on developing competency.
Fortinet	It partnered with Fortinet as an expert level partner. It created joint solutions on enterprise protection with SASE vendors that included automation and integrated services leveraging tools such as EDR, bots, and Wipro's internal automation tool, SMC AI. It established a CoE lab to skill resources through certification and training programs for Fortinet. Additionally, it set up a customer user experience lab to showcase required use cases and conducted podcasts and roadshows to promote these initiatives. Additionally, it worked on enhancing competency related to SSE solution features.
Versa	Partnered with Versa for SDWAN and SSE
Silver Peak	Partnered with Silver Peak for SDWAN and SSE

Wipro profile (page 4 of 6)

Partnerships

[NOT EXHAUSTIVE]

Key events (representative list)

Event name	Type of event	Details
Cisco certifications	Investment	Trained and certified 522 professionals in Cisco certifications, achieving Cisco Black Belt certification
Netskope trainings and certifications	Investment	It trained and certified 73 professionals in Netskope, completing various courses that included Netskope security cloud operation and administration, Netskope security cloud implementation and integration, and Netskope security cloud activation and adoption, all of which featured e-learning and lab components. Additionally, the professionals achieved certifications through Pearson VUE exams for the Netskope certified cloud security administrator, Netskope certified cloud security integrator, and Netskope certified cloud security architect.
Zscaler trainings and certifications	Investment	Trained and certified 1,212 professionals in Zscaler, completing courses that included Zscaler for users – essentials, Zscaler for users – advanced, and ZDX operationalization
Palo Alto trainings and certifications	Investment	Trained and certified 630 professionals in Palo Alto Networks certifications, including the Palo Alto Networks Accredited Systems Engineer (PSE) – Prisma cloud associate certificate, Palo Alto Networks system engineer professional – Prisma cloud, Prisma Certified Cloud Security Engineer (PCCSE), and Prisma Micro-credential for Cloud Security Consultant (PMCC)
Symantec (Broadcom) trainings and certifications	Investment	Trained and certified 320 professionals in Symantec, achieving the Symantec specialist certification
Fortinet trainings and certifications	Investment	Trained and certified 277 professionals in Fortinet, completing the Network Security Expert (NSE) certification program, which included levels NSE1 through NSE8
Checkpoint trainings and certifications	Investment	Trained and certified 480 professionals in Check Point, achieving various certifications, including the Check Point Certified Security Administrator (CCSA), Check Point Certified Security Expert (CCSE), Check Point Certified Security Master (CCSM), and Check Point Certified Security Master Elite (CCSM Elite)
Silver Peak trainings and certifications	Investment	Trained and certified 86 professionals in Silver Peak, achieving the Aruba Accredited SDWAN Professional (AASP) and Silver Peak Expert (SPX) certifications

Wipro profile (page 5 of 6)

Case studies

[NOT EXHAUSTIVE]

CASE STUDY 1

Enhanced seamless access to internal applications for all users

Client

A leading UK-based insurance provider

Business challenge

The client faced challenges to scale its F5 Virtual Private Network (VPN) to meet the growing demand for internal application access. The existing VPN system lacked consistent security policies for remote users, creating variations across VPN gateways, and allowing third-party access thus raising security concerns. Frequent configuration changes led to high operational costs, and despite significant investments in employee experience, the infrastructure could not support these improvements effectively.

Solution

- Implemented a SASE solution and enabled seamless access to internal applications for all users, ensuring service continuity and remote access
- Eliminated operational overhead by removing the need for complex internal routing configurations
- Established uniform security policies for roaming users, ensuring consistent protection for all remote access scenarios
- Mitigated risks associated with third-party access, improving data security

Impact

- Streamlined operations and improved end-user experience for the organization
- Reduced operational overheads while ensuring secure and scalable access for all users
- Assured rapid response and resolution times with Service Level Agreements (SLAs) of under 15 minutes for Priority 1 (P1) incidents and a resolution within four hours
- Ensured prompt handling of Priority 2 (P2) incidents with a response time of under 30 minutes and resolution within eight hours
- Delivered efficient management of Priority 3 (P3) and Priority 4 (P4) incidents, ensuring reliable service continuity and minimizing business disruption

CASE STUDY 2

Implemented a SASE solution to enhance security and reduce costs

Client

A leading European automaker

Business challenge

The client needed to replace its outdated Secure Web Gateway (SWG) to enhance security for its Software-as-a-Service (SaaS) applications. It wanted to reduce Multiprotocol Label Switching (MPLS) spending, while increasing the efficiency of its IT delivery. The legacy systems were inadequate in providing the necessary protection and visibility for SaaS applications, leading to potential security risks and high operational costs.

Solution

- Implemented a comprehensive SASE solution with Cloud Access Security Broker (CASB) and SWG services
- Enabled visibility into SaaS application usage, improving monitoring and control
- Improved security for Secure Sockets Layer (SSL) traffic, providing advanced threat protection
- Reduced dependency on MPLS by transitioning app access through the SSE cloud
- Centralized management for applications and web traffic

Impact

- Increased security of SSL traffic with advanced threat protection and improved visibility of applications accessed by users
- Reduced MPLS costs resulting in substantial savings for the organization
- Identified and categorized sanctioned and unsanctioned applications, strengthening governance and compliance
- Established SLAs to ensure quick response times for incidents: under 15 minutes for P1 incidents with resolution within four hours, and under 30 minutes for P2 incidents with resolution within eight hours
- Delivered efficient management of P3 and P4 incidents, ensuring reliable service continuity and minimizing disruptions to business operations










Wipro profile (page 6 of 6)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact

Vision and capability

Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Wipro adopts an integrated SASE approach with Security Management Center (SMC) AI, focusing on zero trust assessments and competency building across multiple SASE vendors
- It emphasizes integrating SASE-as-a-Service and CASB capabilities into SASE, with industry-specific teams addressing vertical challenges and regulations
- Enterprises can gain from the selective strategy of Wipro investing in providers focused on automation and partnership with security vendors for increased joint innovation
- Clients appreciate its competitive pricing, comprehensive solution portfolio, and proactive approach to addressing their issues

Limitations

- Enterprises can face a shortage of onsite skills and local presence in data centers and Point of Presence's (PoP) specific to the EMEA region for SASE transformation
- Wipro's ability to consolidate different solutions to offer an integrated view is limited due to the regulatory challenges specific to industries
- Wipro has limited partnerships and integrations with AI, gen AI across the solutions compared to peers
- Some clients mentioned that there is a scope for improvement in Wipro's technical expertise and resource management capabilities

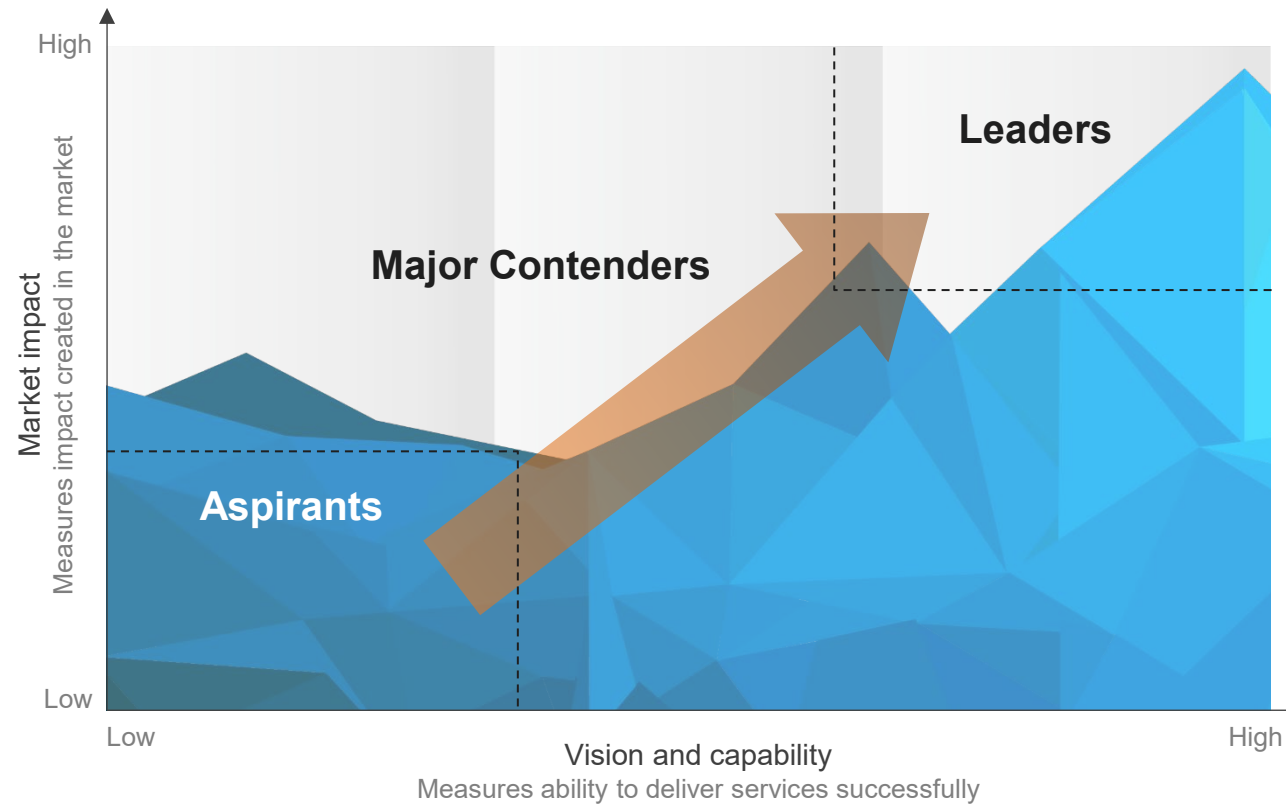
Appendix

PEAK Matrix® framework

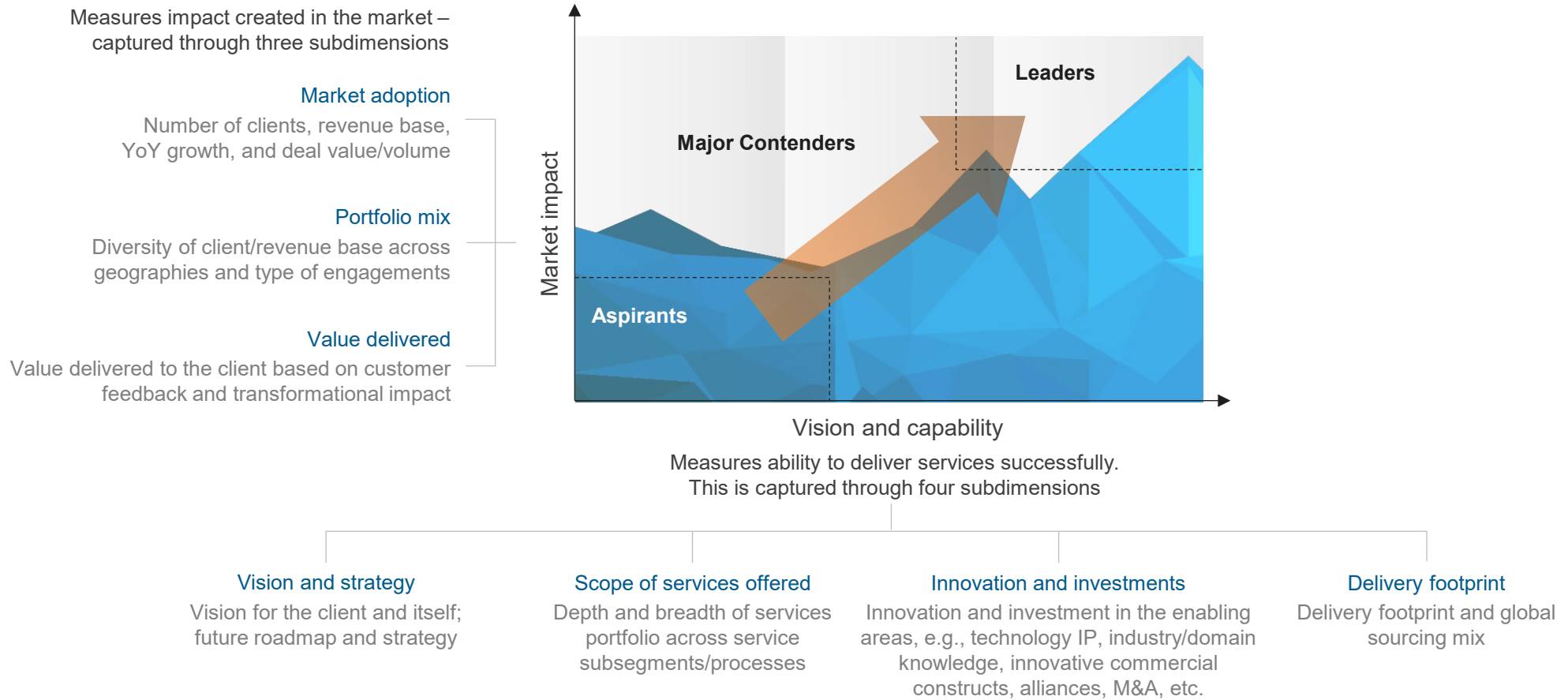
FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions



FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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