



2021 & 2022 Market Share Leader Award

Security Service Edge (SSE) Market

Presented by: Dell'Oro Group

About Dell'Oro Market Share Leader Award



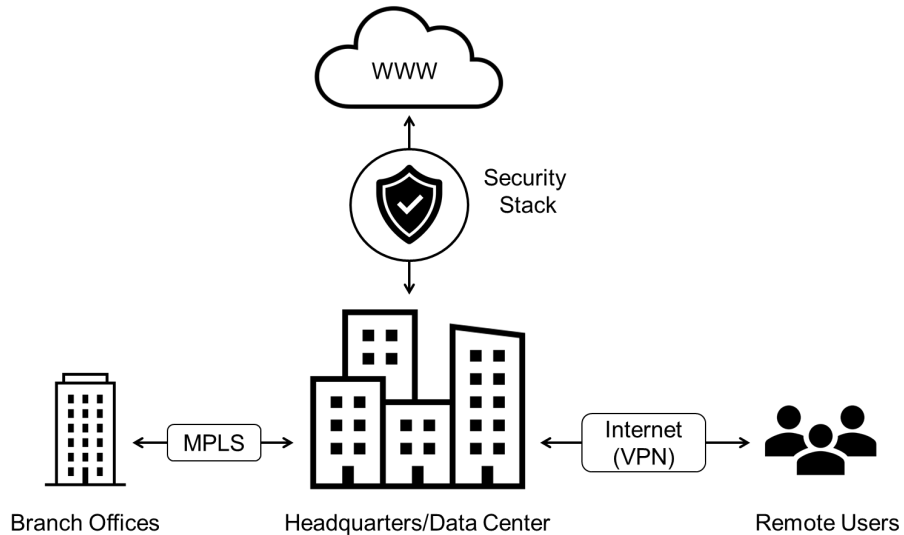
Dell'Oro tracks market size and shares on a quarterly basis for most product categories within telecom, security, networking, and data center. Using objective data and a proven and respected methodology, Dell'Oro Group identifies the leading supplier by total annual revenue in specific product categories.

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SSE: Security Side of SASE

Legacy Network Topology (Hub-and-Spoke)



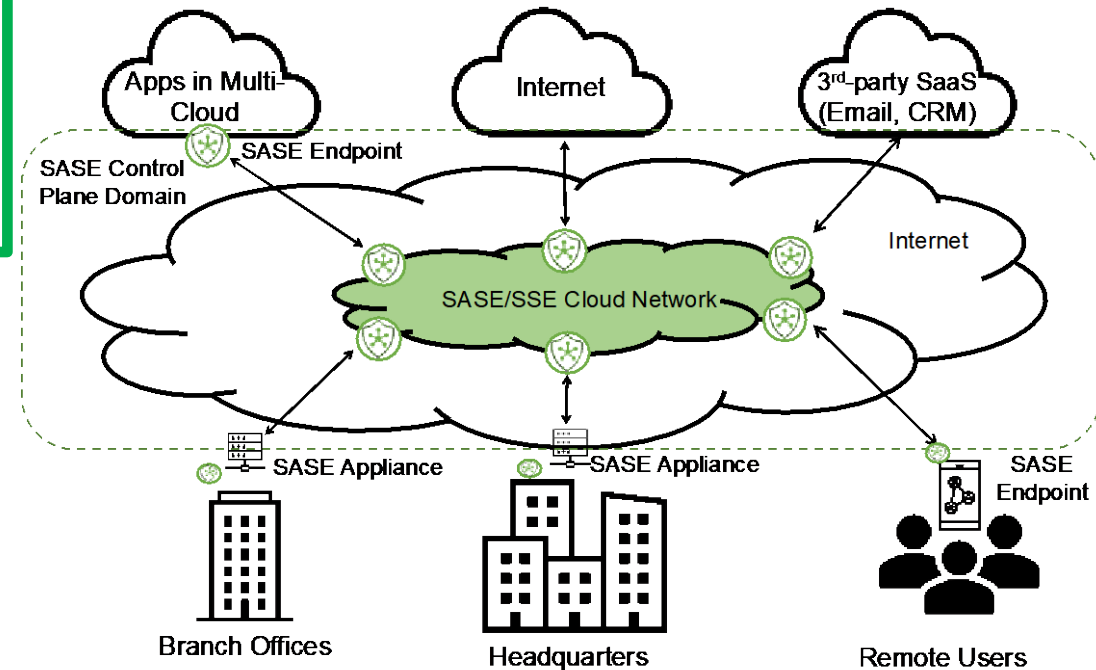
Enabling Technologies

Software-Defined Networking (SD-WAN)



Cloud-Delivered Network Security (SSE)

Modern Network Topology (SASE)



SSE Vendor Landscape



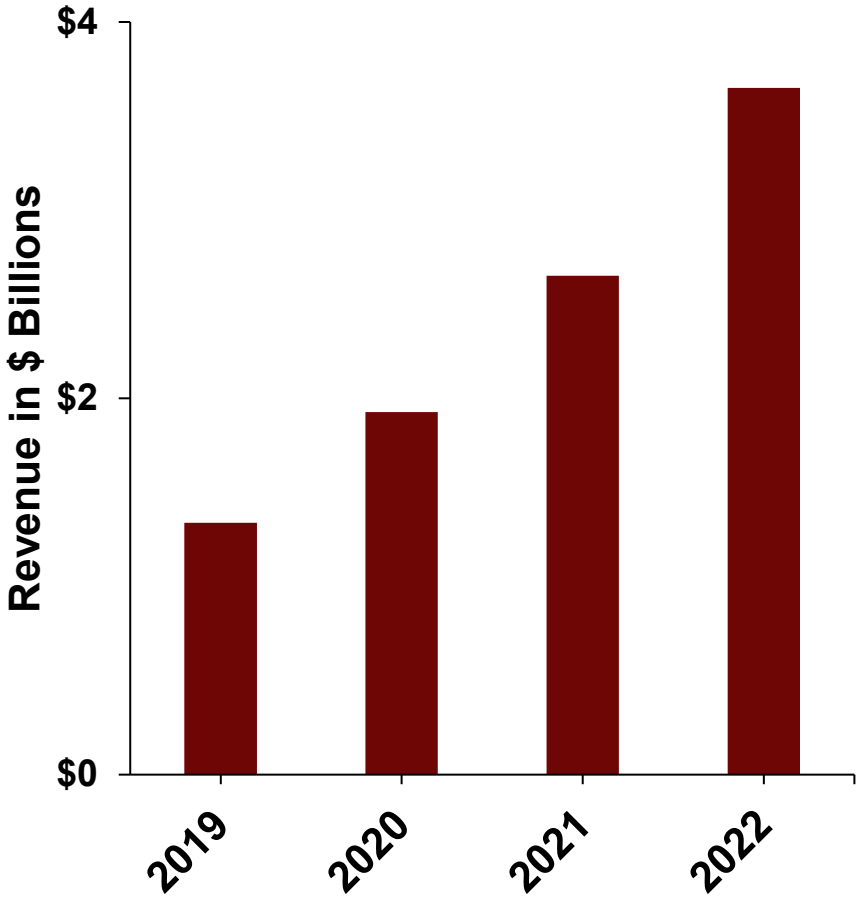
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SSE Market 2019-2022

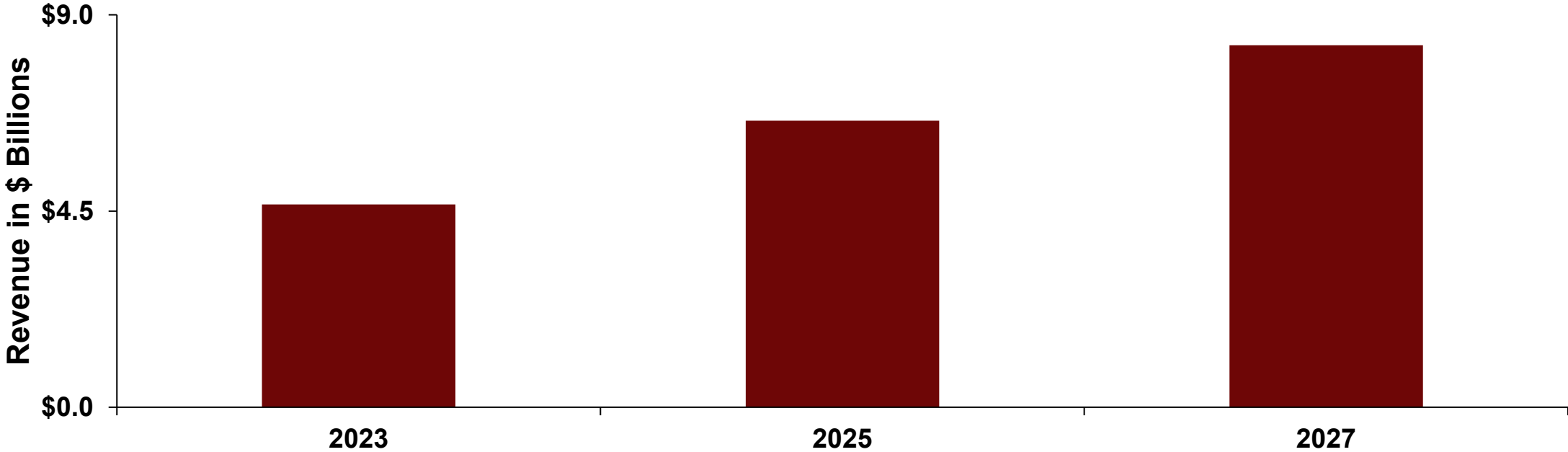


SSE Market:

- Cloud-delivered solution implementing multiple network security functions (CASB, Firewall-as-a-service, SWG, ZTNA)
- SSE market revenue was \$3.7 B in 2022, representing 38% growth for full year 2022



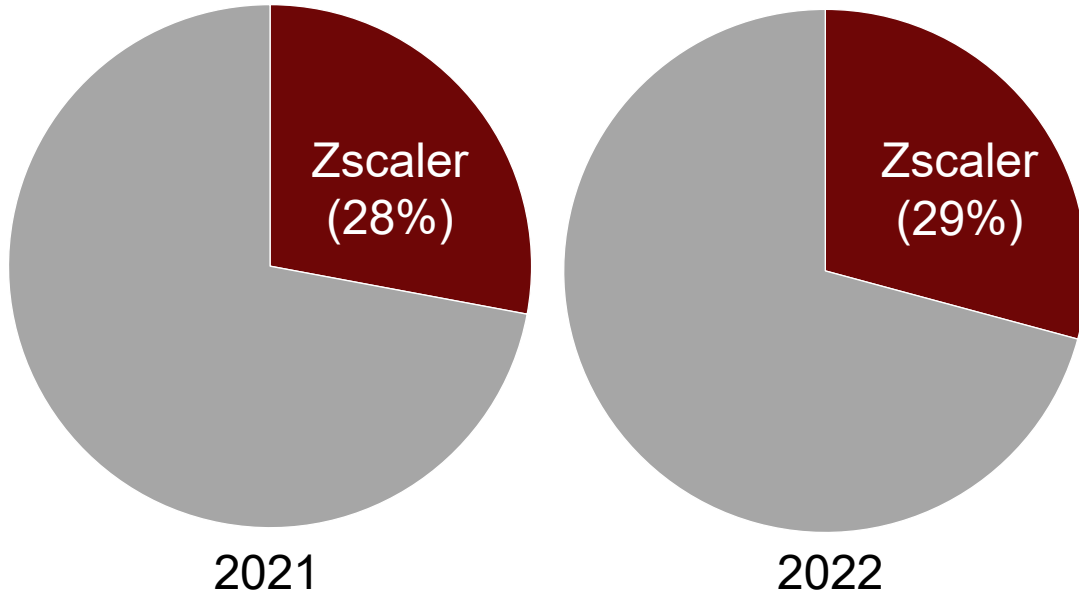
SSE Market Forecast



- Market to exceed \$8 B by 2027
- 5-Year CAGR (2022-2027) of 18%
- Protecting hybrid work and cloud apps to fuel robust demand
- Superior agility and scalability compared to traditional hardware approach



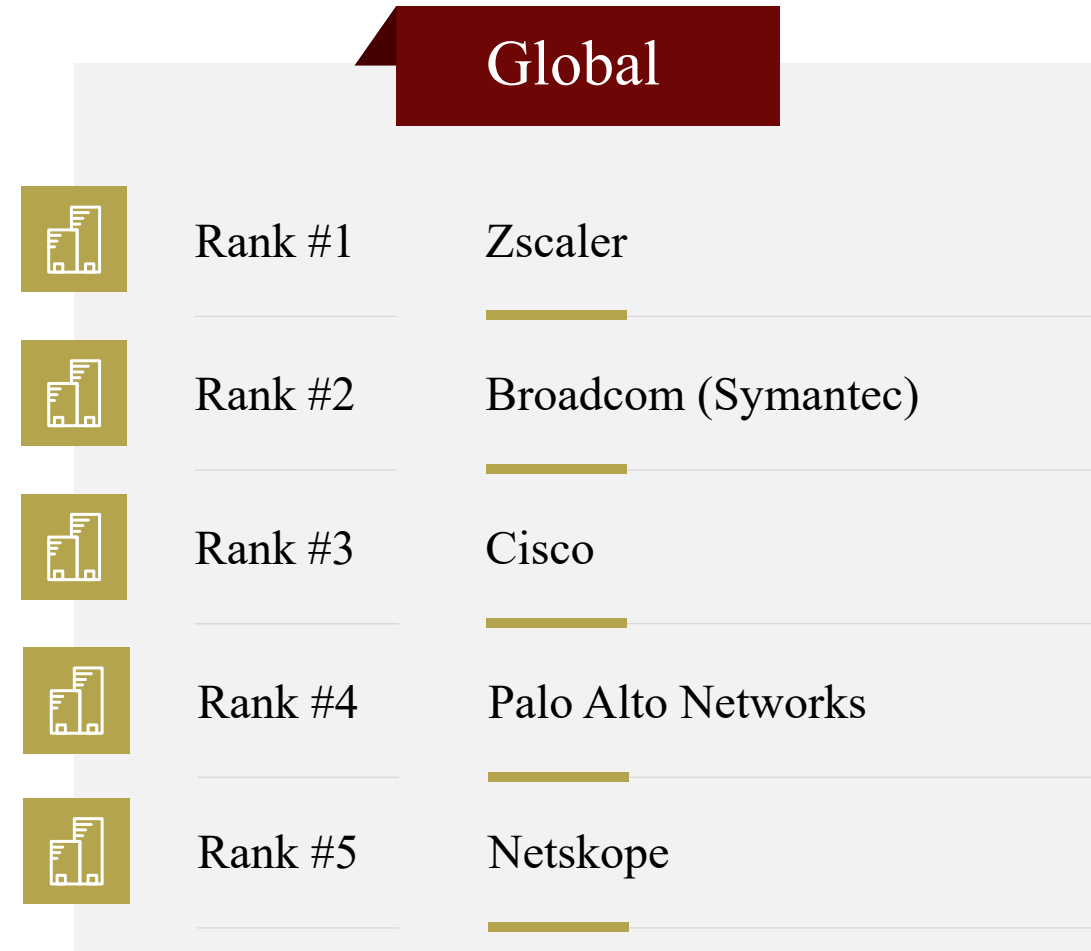
SSE Market Revenue Share Leader 2021 and 2022



Zscaler led the SSE market in 2021 and 2022



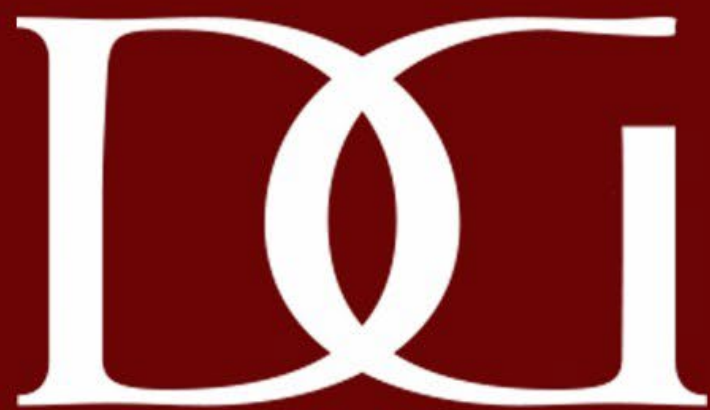
SSE Market Revenue Ranking 2022



About Dell'Oro Group



- Founded in 1995 and headquartered in Silicon Valley.
- Boutique research firm specializing in telecommunications, security, enterprise networks, and data center infrastructure.
- Quarterly Reports on market share, market size, and pricing, by macro region of the world.
- 5-Year Forecast Reports, analyst judgment 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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