



IT Security Services – Market Trends and PEAK Matrix™ Assessment: “Security – The Biggest Digital Insecurity”

Cloud & Infrastructure Services (CIS)

Market Report – August 2017: Complimentary Abstract / Table of Contents

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* Banking, financial services, and insurance

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment



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Background of the research

Background of the research

- Security threats are increasing in complexity, size, and variety. The rapid digitalization has made the enterprise IT security landscape highly complex and challenging to handle, as CISOs look to guard their enterprise environments against burgeoning internal and external threats. The proliferation in digital touch-points, driven by increasing adoption of next-generation technologies / delivery models such as cloud, IOT, mobility, and social media have rendered existing traditional enterprise security and risk mitigation strategies obsolete. Enterprises are now required to take a more intelligence-driven, holistic security approach to deal with this rapidly changing threat landscape
- Technology complexities associated with security service deployment and lack of internal skills is pushing enterprises to increasingly seek third-party support for security services. Service providers are beefing up their global security service delivery capabilities and coverage, expanding their partnership networks to align with next-generation security requirements of clients, and investing in nurturing their security services talent in order to stay relevant
- In this research, we present fact-based trends impacting the security services market, along with the assessment and detailed profiles of 17 IT service providers featured on the IT security services PEAK Matrix. Each service provider profile gives a comprehensive picture of their security services vision, services suite, scale of operations, key solutions, and partnerships
- The assessment is based on Everest Group's annual RFI process conducted over Q1 and Q2 2017, interactions with leading IT security service providers, and analysis of the IT security services marketplace

Scope of this report:

- **Services:** IT security services
- **Geography:** Global
- **Service providers:** 17 leading IT service providers

This report includes the profiles of the following 17 service providers on the IT security services PEAK Matrix:

- **Leaders:** Accenture, DXC Technology, IBM, and Wipro
- **Major Contenders:** Cognizant, Fujitsu, HCL Technologies, Mphasis, NTT DATA, SecureWorks, TCS, Tech Mahindra, and Unisys
- **Aspirants:** Hexaware, Luxoft, Microland, and Syntel

Our methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

1 Robust definitions and framework
(PEAK Matrix, market maturity, and technology adoption/investment)

2 Primary sources of information
(Annual contractual and operational RFIs, service provider briefings, and market feedback)

3 Diverse set of market touchpoints
(Ongoing interactions with key stakeholders, input from a mix of perspectives and interests, as well as support via data analysis and thought leadership)

4 Fact-based research
(Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers)

- Annual RFI process and interaction with leading IT infrastructure / IT security service providers
- Dedicated team for IT infrastructure / IT security services adoption trends
- Over 20 years of experience in advising clients on global services decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

Everest Group's IT security services research is based on four key sources of proprietary information

1

- Proprietary database of IT services contracts of major IT service providers with security services in scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including service provider, contract type, TCV and ACV, service provider FTEs, start and end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed

2

- Proprietary database of IT service providers (updated annually)
- The database tracks the following for each service provider:
 - Revenue and number of FTEs
 - Revenue split by region
 - Number of clients
 - Location and size of delivery centers
 - FTE split by different lines of business
 - Technology solutions developed

3

- **Service provider briefings**
 - Vision and strategy
 - Key strengths and improvement areas
 - Annual performance and future outlook
 - Emerging areas of investment

4

- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Drivers and challenges for adopting IT security services
 - Assessment of service provider performance
 - Emerging priorities
 - Lessons learnt and best practices

Service providers assessed

accenture

Cognizant

DXC.technology

FUJITSU

HCL

Hexaware
TECHNOLOGIES

IBM

LUXOFT

MICROLAND®
Extraordinary. Everyday.

Mphasis
Unleash the Next

NTT DATA

SYNTEL
Consider IT Done!

SecureWorks

TATA CONSULTANCY SERVICES

Tech
Mahindra

UNISYS
imagine it. done.

wipro

Note: Assessment for Cognizant, Fujitsu, IBM, DXC Technology, and Unisys excludes service provider inputs for this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers. HPE Services and CSC have now combined into DXC Technology

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information, that is contract-specific, will be presented back to the industry only in an aggregated fashion

This report focuses on IT security services and offers insights into the prominent service providers operating in this space

Focus of this research

NOT EXHAUSTIVE

Security services – market definition

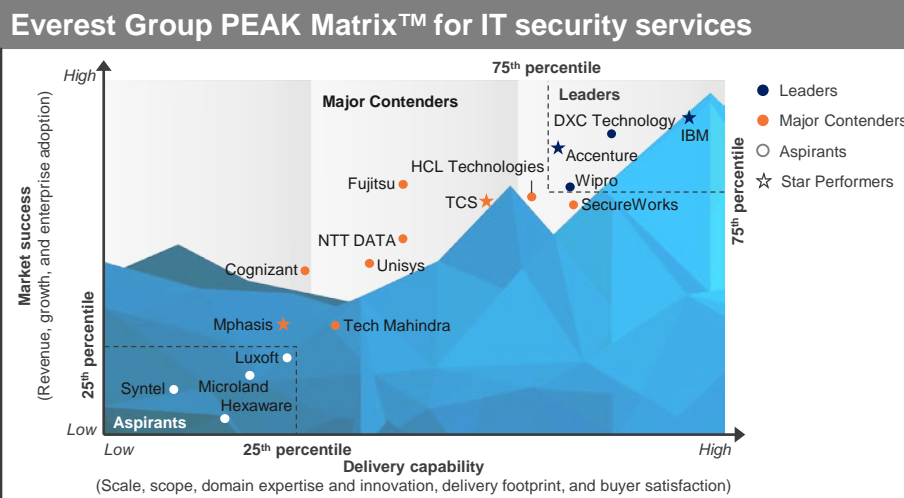
Consulting/assessment services
 Policy and process consulting, vulnerability assessment, audits, certification services, optimization and readiness assessment services, etc.

Design and implementation services
 Security architecture design and rearchitecting, security roadmap formulation, security implementation services, etc.

Management and monitoring services
 Ongoing device management and continuous monitoring (including remote monitoring through security operation centers), incident management, and Security Information and Event Management (SIEM)

- End-point security**
 End-point security (end-points including desktops, mobile devices, servers, etc.) – Host Intrusion Prevention Systems (HIPS), managed end-point protection (anti-malware, intrusion prevention, antivirus, etc.), file integrity monitoring, etc.
- Application security**
 Application security testing, application whitelisting, application self-protection, application control, web application security (including firewalls), etc.
- Identity and Access Management (IAM)**
 Authentication, access services, single sign-on, password & storage management, authorization services, fraud management (transaction monitoring, anti-phishing, adaptive authentication, and anti-malware), etc.
- Data and content security**
 Security services for structured and unstructured data: Data Loss Prevention (DLP), data encryption, protection & monitoring, database security, storage security, etc.
- Network security**
 Firewalls, Email/URL gateways, Network Intrusion Prevention Systems, Distributed Denial-of-Service (DDoS) prevention & mitigation, Unified Threat Management (UTM), VPN, network control, Advanced Persistent Threat (APT) solutions, VPN, network access control, etc.
- Risk management and compliance**
 IT Governance, Risk Management, and Compliance (GRC), threat intelligence, security analytics, cyber assurance, etc.
- Cloud security**
 Security services specifically designed for securing and governing virtual workloads and hybrid IT environments

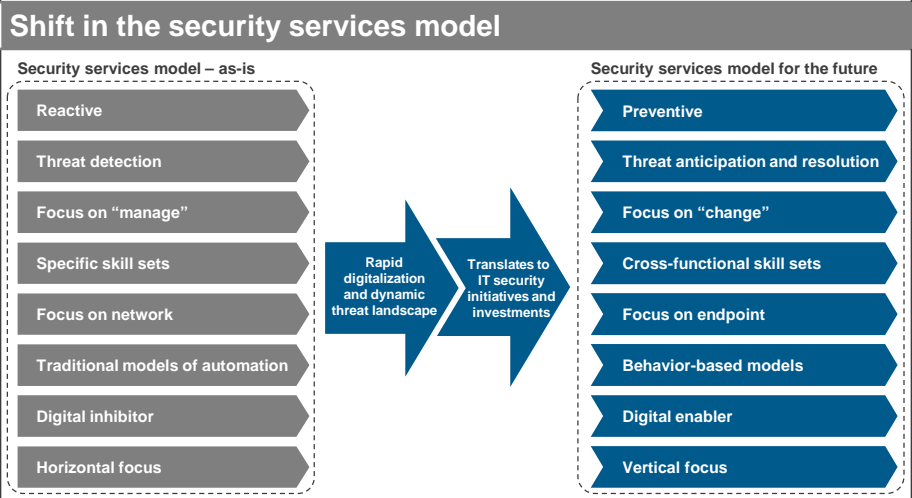
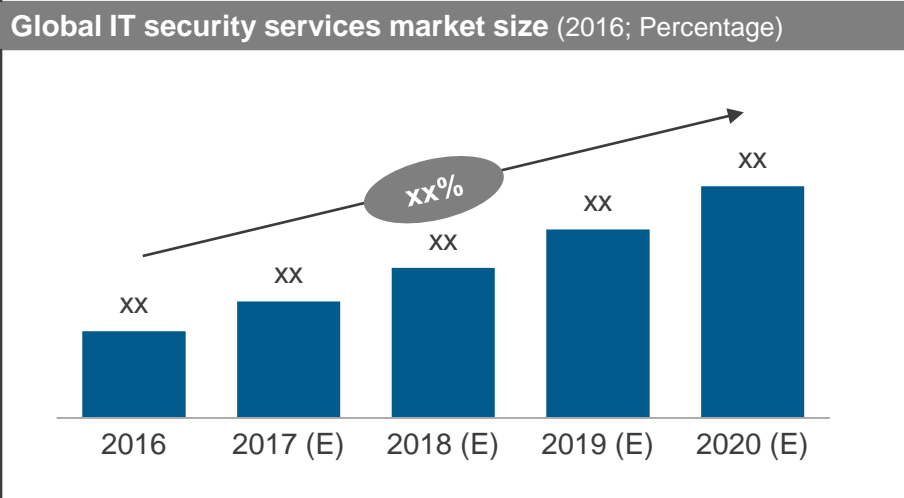
The security services landscape is undergoing a dynamic shift due to the enterprise “digital movement”



Capability assessment

Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

Service provider	Delivery capability						Market success
	Scale	Scope	Domain expertise and innovation	Delivery footprint	Buyer satisfaction	Overall	
Service provider 1	●	●	●	●	●	●	●
Service provider 2	●	●	●	●	●	●	●
Service provider 3	●	●	●	●	●	●	●
Service provider 4	●	●	●	●	●	●	●
Service provider 5	●	●	●	●	●	●	●
Service provider 6	●	●	●	●	●	●	●
Service provider 7	●	●	●	●	●	●	●
Service provider 8	●	●	●	●	●	●	●



Source: Everest Group (year)

This IT security services compendium report has 17 IT service provider profiles, focusing on their IT security services solutions, partnerships, and recent investments

XYZ | IT security services profile (page 1 of 2)

IT security services overview

Strengths

- Deep security expertise backed by its XXXX and strong managed security services capabilities
- Strong credentials in driving complex, large-scale security transformation; has established itself as a top-of-the-mind player for small and medium enterprises

Areas of improvement

- Needs to extend the scope of its delivery capabilities beyond North America to other key regions such as Europe and APAC
- Focus on improving its marketing capabilities by educating customers on the latest technologies to retain mindshare

Scope of coverage: XYZ is estimated to have over XXXX FTEs dedicated to IT security services. The company has over XXXX clients in XXXX countries worldwide. The company processes ~XXXX billion raw security events per day.

IT security services revenue



Adoption by service type



Adoption by industry



Adoption by buyer groups



Source: Everest Group (2017)



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Adoption by service segments



Adoption by geography



XYZ | IT security services profile (page 2 of 2)

IT security services offerings

NOT EXHAUSTIVE

XYZ aims to deliver intelligence-driven security solutions to provide predictive, continuous, and responsive protection. Through its solutions, XYZ enables organizations to predict threats, proactively fortify defenses, continuously detect and prevent cyber attacks, and recover faster from security breaches.

Proprietary solutions (representative list)

Solution	Details
XXXX	It is an intrusion prevention service that helps in deep packet inspection and eliminates malicious inbound and outbound traffic. The solution comes with monitoring, and remote configuration and management systems.
XXXX	It is a platform with a multi-tenant, distributed architecture that analyzes billions of events daily on a real-time basis, and is the backbone of all the XYZ services. The solution also provides event/log collection & management, comprehensive correlation & event analysis, workflow management & ticketing, and security & compliance reporting.
XXXX	It is a managed Endpoint Detection and Response (EDR) service that provides enhanced protection and visibility to identify file-less attacks that use little or no malware.
XXXX	It is a solution for collecting, parsing, compressing, and encrypting logs from client networks, and sending them back to XYZ for analysis (thereby allowing a minimum service disruption and effort).
XXXX	It is a machine learning system that accelerates processing of security events (internal solution).

IT security services partnerships (representative list)

Partner name	Type of partnership	Details
XXXX	Technology partnership	Provides vulnerability management services
XXXX	Technology partnership	Provides endpoint security and next-generation antivirus
XXXX	Technology partnership	Provides next-generation firewall technology

Additionally, XYZ has technology partnerships with Amazon/AWS, TIBCO LogLogic, Lastline, SonicWALL, Kenna Security, Intel/McAfee, Fortinet, Juniper, Imperva, Cisco Sourcefire, F5, and Checkpoint, amongst others for delivering security services.

Recent activities (representative list)

Development	Details
Investment in certifications	Over the years, XYZ has invested in over XXXX different security industry and product certifications for the professional development and growth of its security services talent.

Source: Everest Group (2017)



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Research calendar – Cloud and infrastructure services

Published
 Planned
 Current release

Flagship CIS reports

Release date

Infrastructure Services – Annual Report 2016.....	July 2016
Private Cloud Enablement Services – PEAK Matrix™ Assessment and Profiles Compendium	September 2016
Hosted Private Cloud Services – PEAK Matrix™ Assessment and Profiles Compendium.....	December 2017
IT Infrastructure Automation – Market Update and PEAK Matrix™ Assessment for Solutions (Focus on IT service providers)....	April 2017
IT Operations Automation – Market Trends, PEAK Matrix™ Assessment for Products & Profiles Compendium.....	May 2017
Workplace Services – Market Trends and PEAK Matrix™ Assessment: “End Users are no Less than Customers!”	July 2017
IT Security Services – Market Trends and PEAK Matrix™ Assessment: “Security – The Biggest Digital Insecurity” ..	August 2017
Infrastructure Services – Annual Report 2017	Q3 2017
Hybrid Cloud Enablement Services – Market Trends and PEAK Matrix™ Assessment & Profiles Compendium	Q4 2017
IoT Services – PEAK Matrix™ Assessment & Profiles Compendium	Q4 2017

Thematic CIS reports

Release date

Customer (Dis)Satisfaction: Why Are Enterprises Unhappy with Their Service Providers?	January 2017
Contract Renewals – Infrastructure Services: “Over 40% Incumbents Replaced Annually; Providers Beware!”	February 2017
Enterprise Cloud Services – Annual Report 2017.....	Q3 2017

Note: For a list of all cloud and infrastructure services reports published by us, please refer to our [website page](#)

Additional research recommendations

The following documents are recommended for additional insight into the topic covered in this research. These documents either provide additional details on the topic, or complementary content that may be of interest

- 1. Enterprise Pulse Study 2016 – “Customer (Dis)Satisfaction: Why Are Enterprises Unhappy With Their Service Providers”** ([EGR-2017-4-R-2077](#)); 2016. Despite large scale investments by service providers, customers are largely dissatisfied. This report presents insights into the unstated expectations in an engagement and reviews the enterprises’ current satisfaction level with their service providers. The report also details the technology investment priorities of enterprises and opportunity areas for service providers. The objective of the report is to aid service providers strategize their engagement approach and prioritize investments to meet mounting customer expectations.
- 2. IT Infrastructure Services Automation - Codified Consciousness is the Future** ([EGR-2016-4-R-1885](#)); 2016. The lack of a “coherent and business context-centered” IT infrastructure service automation strategy is one of the key reasons that enterprises fail to realize desired benefits from IT infrastructure investments. This market report investigates this trend and provides an in-depth analysis of the IT infrastructure services automation market. The research covers the current state of the market, enterprise adoption drivers, challenges, best practices, imperatives for IT service providers, technology provider landscape, and outlook for 2016-2017

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About Everest Group

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