IT Security Services – Market Trends and PEAK Matrix™ Assessment & Profiles Compendium

Cloud & Infrastructure Services
Market Report: January 2016 – Preview Deck

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Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

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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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- The full report is included in the following subscription(s)
  - **Cloud & Infrastructure Services**

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1   Banking, financial services, and insurance

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Background of the research

Background of the research
- The enterprise IT security landscape is becoming increasingly complex and challenging to handle as CISOs look to guard their enterprise environments against burgeoning internal and external threats. The proliferation in digital touchpoints driven by increasing adoption of next generation technologies / delivery models such as cloud, IOT, mobility, and social media has rendered existing traditional enterprise security and risk mitigation strategies obsolete and ineffective to say the least. 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 the 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 14 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 Q3 and Q4 2015, 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:** 14 leading IT service providers

This report includes the profiles of the following14 service providers on the IT security services PEAK Matrix:
- **Leaders:** Dell SecureWorks, HP Enterprise, IBM, and Wipro
- **Major Contenders:** Accenture, CSC, Capgemini, CGI, Fujitsu, T-Systems, TCS, and Unisys
- **Aspirants:** Cognizant and Mphasis

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Table of contents

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

Focus of this research

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 re-architecting, 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, anti-virus, 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 and 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, E-mail/URL gateways, Network Intrusion Prevention Systems, Distributed Denial-of-Service (DDoS) prevention and mitigation, Unified Threat Management (UTM), VPN, network control, APT (Advanced Persistent Threat) 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 deigned for securing and governing virtual workloads and hybrid IT environments

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
  - Number of clients
  - FTE split by different lines of business
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed

3
- **Service provider briefings**
  - Vision and strategy
  - Annual performance and future outlook
  - Key strengths and improvement areas
  - Emerging areas of investment

4
- **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 — High performance. Delivered.

Capgemini — CONSULTING.TECHNOLOGY.OUTSOURCING

CGI

Cognizant

CSC

DELL

FUJITSU

Hewlett Packard Enterprise

IBM

Mphasis — Unleash the Next

TATA CONSULTANCY SERVICES

T··Systems·

UNISYS

WIPRO — Applying Thought

Note: Assessment for Capgemini, CSC, Fujitsu, IBM, and T-Systems excludes service provider input on this particular study, and is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers. Further, we continuously monitor market developments and track additional service providers beyond those included in the analysis (e.g., AT&T, Atos, BT, CompuCom, HCL Technologies, Infosys, Orange Business Services, and Verizon did not respond to our RFI requests)

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

Fourteen IT service providers were assessed and mapped on Everest Group's PEAK Matrix for IT security services

This report provides the assessment and detailed profiles of the 14 IT service providers featured on Everest Group's security services PEAK Matrix. The PEAK Matrix is specific to IT service providers, who are involved in delivering security services such as identity and access management, application security, data security, end-point security, network security, risk management and compliance, and cloud security

Assessment of the service provider landscape for IT security services leveraging Everest Group's PEAK Matrix highlights the following categories of service providers:

- **Leaders:** Dell SecureWorks, HP Enterprise, IBM, and Wipro

- **Major Contenders:** Accenture, CSC, Capgemini, CGI, Fujitsu, T-Systems, TCS, and Unisys

- **PEAK Matrix Aspirants:** Cognizant and Mphasis

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This security service provider compendium report has 14 IT service provider profiles, focusing on their security service solutions, scale of operations, and domain investments

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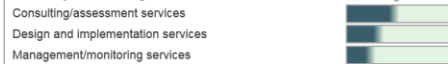### IT security services overview

Headline assessment
XYZ security services business scale currently lags behind that of the Leaders in the space; however, the service line is currently witnessing significant growth, buoyed by continuous investments being made by the company in expanding its IP portfolio and delivery capabilities. XYZ is specifically targeting its existing large client base for broader IT services to up / cross-sell security services. A robust partnership network, deep security expertise, and a strong consulting heritage make XYZ a highly suitable candidate for enterprises looking to drive largescale vendor-agnostic and vertical-aligned security transformation and implementation. However, increasing the scale, responsiveness, and quality of its global managed security services is a key improvement area. XYZ can also look to further build its capabilities in the threat prevention space.
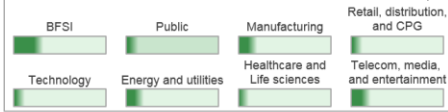
IT security services revenue

<US$100 million | US$100-500 million | >US$500 million

IT security services segments — Strength of focus
- Consulting/assessment services
- Design and implementation services
- Management/monitoring services

IT security services by industry — Relative adoption
- BFSI
- Public
- Manufacturing
- Technology
- Energy and utilities
- Healthcare and Life sciences
- Telecom, media, and entertainment
- Retail, distribution, and CPG

Relative focus: Buyer groups — Strength of focus
- Small (annual revenue < US$1 billion)
- Medium (annual revenue = US$1-5 billion)
- Large (annual revenue > US$5 billion)

Scope of coverage
XYZ security services offerings are primarily targeted towards Global 2000 enterprises. The company's portfolio includes security assessment & architecture services, digital identity, cyber defense, managed security, and security services covering emerging technologies. XYZ leverages its seven Security Centers (SOC) across the globe, backed by its global delivery netw... security services to clients.

IT security services adoption by geography
- High adoption
- Moderate adoption

Source: Everest Group (2016)
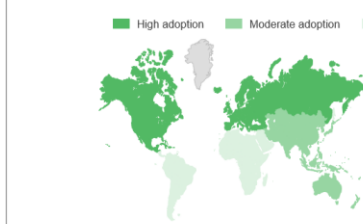
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XYZ | IT security services profile (page 2 of 2)
IT security services offerings

NOT EXHAUSTIVE

XYZ's vision for IT security services is to defend and empower what matters its clients' businesses through holistic security solutions that replace vulnerability with capability. XYZ's focus is on helping enterprises to prevent, intercept, and remediate security risks, providing the resilience required to drive innovation, high performance, and growth.

Proprietary solutions (representative list)

Solution	Details
Solution 1	A comprehensive framework that helps in defining processes, roles, governance, and technical capabilities required by an enterprise to mitigate risk (aligned to specific industry needs and standards).
Solution 2	A solution that contextualizes and prioritizes industry- and client-specific threats via dashboard representation, along with higher-order analytics capabilities for multi-stage review and analysis of ongoing remediation.
Solution 3	A tool to assess enterprises' security posture and maturity to develop future roadmaps and recommendations.
Solution 4	An accelerator to help SOC teams identify, investigate, and resolve security attacks – the accelerator is designed to cover industry platforms such as RSA Archer SecOps, HP ArcSight, RSA Security Analytics, and Securonix.

Alliances (representative list)

Partner name	Type of partnership	Details
HP Enterprise and Splunk	Technology partnership	Deliver threat management services.
Oracle and ForgeRock	Technology partnership	Provide identity and access management solutions.
Crowdstrike and FireEye	Technology partnership	Provide threat management services, ongoing monitoring, and analytics services.

XYZ's partners in the security services space include Oracle, Microsoft, HP, EMC RSA, Trend Micro, Intel, Symantec, AlertLogic, Qualys, illmio, Veracode, and CloudPassage, among others.

Recent activities (representative list)

XYZ acquired ABC to boost its capabilities in cyber attack simulation, threat modeling, cyber investigations, and security risk advisory services.

Source: Everest Group (2016)

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Cloud and infrastructure services research calendar

	Published	Current

Topic	Release date
Optimizing IT Service Delivery: Technology is the Answer	February 2015
Enterprise Cloud Adoption – Solving the Pricing Conundrum	March 2015
Enterprise Cloud Services – Annual Report 2015: "Contracting Remains Cloudy"	March 2015
Upcoming Contract Renewals – Infrastructure Services	March 2015
Workplace Services – PEAK Matrix™ Assessment and Profiles Compendium	June 2015
Infrastructure Services – Annual Report 2015: "Digital Businesses: Mind Your Security"	July 2015
Workplace Services Market Update 2015 – Left is Right for the Service Desk!	July 2015
Workplace Services PEAK Matrix – Europe-focused – Assessment and Profiles Compendium	September 2015
Private Cloud Enablement Services – PEAK Matrix™ Assessment and Profiles Compendium	November 2015
Hosted Private Cloud Services – PEAK Matrix™ Assessment and Profiles Compendium	December 2015
IT Security Services – Market Trends and PEAK Matrix™ Assessment & Profiles Compendium	January 2016

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 which may be of interest

1. **Enterprise Cloud Services – Annual Report 2015: "Contracting Remains Cloudy"** (EGR-2015-4-R-1434); 2015. This research provides fact-based trends impacting the cloud services market. It analyzes multiple aspects such as overall cloud service market size and growth estimates, deal size, cloud deployment trends, buyer adoption trends, and outlook for 2015-2016. Buyers will gain by understanding these trends and evolving their sourcing portfolio accordingly. Service providers will benefit by aligning their strategy to cater to these trends

2. **Workplace Services – PEAK Matrix™ Assessment and Profiles Compendium** (EGR-2015-4-R-1462); 2015. Today's enterprise workplace is characterized by a strong focus on improving the overall end-user experience by offering secure and on-demand access to applications and data across the devices of choice, based on the individual personas of the users. Service providers are investing to ramp up their capabilities, build up scale, and develop and acquire IP to align their capabilities with changing market dynamics. This report provides the assessment and detailed profiles of 23 IT service providers featured on Everest Group's Workplace Services PEAK Matrix

For more information on this and other research published by Everest Group, please contact us:

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