



## Healthcare IT Security Services – Market Trends

Healthcare & Life Sciences IT Outsourcing

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

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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

## Subscription information

- The full report is included in the following subscription(s)
  - **Healthcare & Life Sciences IT Outsourcing**
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\* Banking, financial services, and insurance



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# Background of the research

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## Background of the research

- Healthcare IT security has become a key strategic priority for C-level executives across payer and provider enterprises, given the recent high-level security breaches in the industry. CISOs realize that these breaches have long-ranging impact, and are trying to safeguard their enterprises against internal and external threats. The rapid digitalization has made their job even more complex and difficult, as proliferation of digital touch-points (IoT devices, mobile devices, and social media) have rendered traditional enterprise security and risk mitigation strategies obsolete
- Technology complexities associated with security service deployment and lack of internal skills are 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
- Everest Group recently published a detailed analysis of the overall IT security services market ([EGR-2017-4-R-2310](#)) and also assessed 17 leading IT service providers in this space. From our market interaction with enterprises and IT service providers, we understand that IT security services capabilities are largely horizontal in nature and the service provider landscape will remain same for the healthcare industry as well
- In this report, we present healthcare-specific cybersecurity trends, service provider landscape, and implications for service providers and enterprises. The assessment is based on interactions with leading IT security service providers and analysis of the IT security services marketplace

# 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

# 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

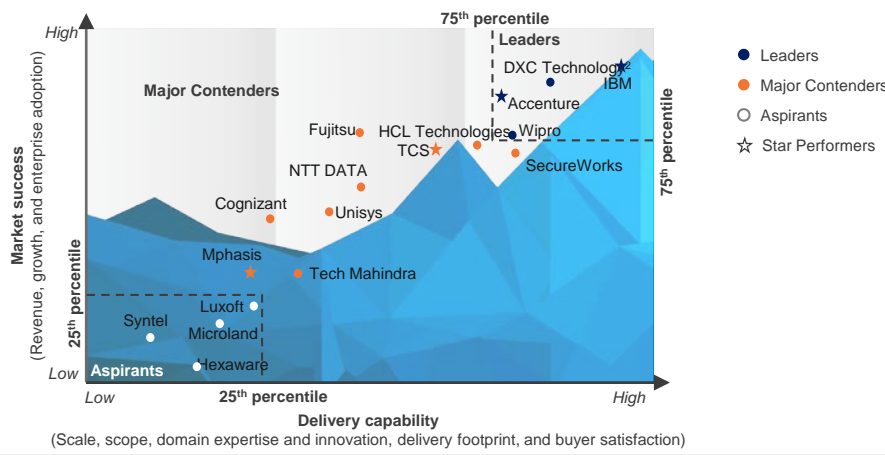
IT Governance, Risk Management, and Compliance (GRC), threat intelligence, security analytics, cyber assurance, etc.

### 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”

## Everest Group PEAK Matrix™ for IT security services

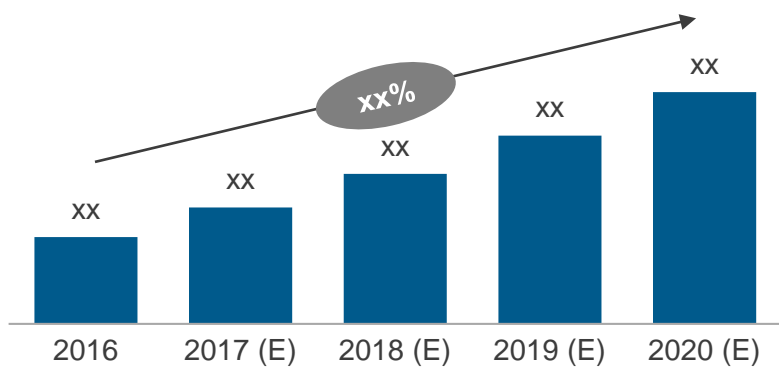


## Capability assessment

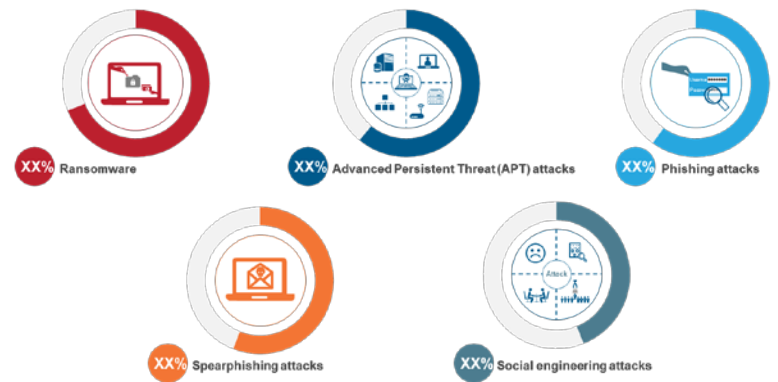
Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

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	●	●	●	●	●	●	●

## Global IT security services market size



## Top five healthcare security threats



Source: Everest Group (2017)

# HLS ITS research calendar

Published
  Planned
  Current release

## Flagship HLS ITS reports

Release date

Healthcare Provider Annual Report: The Big Bang MACRA-Economic Theory of Provider IT Transformation .....	November 2016
EHR IT Services in Healthcare Provider Industry – Service Provider Landscape with PEAK Matrix™ Assessment 2016 ....	November 2016
Healthcare Provider IT Services – Service Provider Landscape with PEAK Matrix™ Assessment 2016 .....	November 2016
Healthcare Payer Annual Report: Acing Uncertainties in the Payer Market: The Trump Cards .....	April 2017
Life Sciences IT Application Services – Service Provider Landscape with PEAK Matrix™ Assessment 2017 .....	May 2017
Life Sciences Clinical and R&D Services – Service Provider Landscape with PEAK Matrix™ Assessment 2017 .....	July 2017
Healthcare Provider Annual Report .....	Q3 2017
Life Sciences Clinical and R&D Products and Solutions – Service Provider Landscape with PEAK Matrix™ Assessment 2017 .....	Q3 2017

## Thematic HLS ITS reports

Medicare/Medicaid Version 2.0: Exploring the Next Growth Wave in the Market .....	November 2016
Exploring GICs in the Life Sciences Industry .....	February 2017
Hot Life Sciences Startups: Friends, Foes, and Frenemies in the Innovation Ecosystem .....	March 2017
Internet of Things (IoT) in Medical Devices .....	March 2017
Automation Playbook for Healthcare Payers: The Ultimate Guide to the Next Big Treasure Hunt .....	April 2017
Using Blockchain to Address Interoperability Concerns in Healthcare .....	June 2017
<b>Healthcare IT Security Services – Market Trends .....</b>	<b>September 2017</b>
Healthcare Analytics: Hot Product Vendors 2017 .....	Q4 2017

Note: For a list of all Healthcare & Life Sciences IT Outsourcing reports published by us, please refer to our [website page](#)



# Additional HLS IT services research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details 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 Security Services – Market Trends and PEAK Matrix™ Assessment: “Security – The Biggest Digital Insecurity”** ([EGR-2017-4-R-2310](#)); 2017. 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, has rendered the existing traditional enterprise security and risk mitigation strategies obsolete. Enterprises are now required to take a more intelligence-driven and holistic security approach to deal with this rapidly changing threat landscape. Service providers need to make continuous investments in delivering next-generation security services that support the digitalization movement of enterprises. In this research, we present the assessment and detailed profiles of 17 IT service providers featured on the PEAK Matrix for IT security services. Each service provider profile gives a comprehensive picture of their IT security services vision, scale & nature of operations, and domain investments

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## About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

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