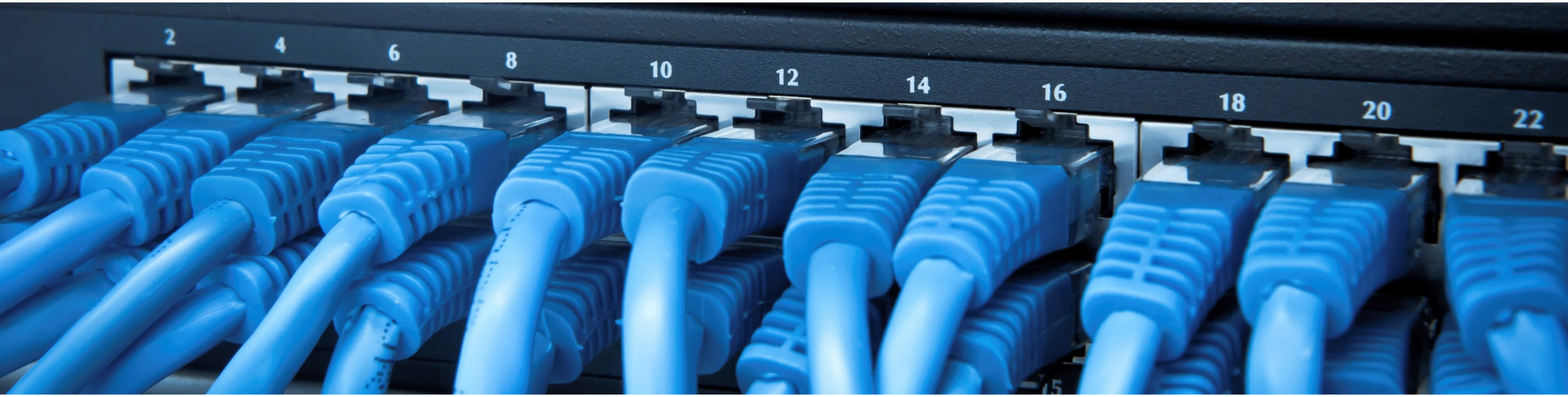

IT Security Services PEAK Matrix™ Assessment and Market Trends: Enterprise Security Journeys and Snowflakes – Both Unique and Like No Other!

Cloud & Infrastructure Services (CIS)

Market Report – December 2018: Complimentary Abstract / Table of Contents

EGR-2018-29-CA-2880

Our research offerings for global services

- **Market Vista™**
  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available
- **Application Services**
- **BPS | Banking & Financial Services**
- **BPS | Healthcare & Life Sciences**
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- **Catalyst™**
- **Cloud & Infrastructure**
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  - **Cloud & Infrastructure Services**
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In addition to a suite of published research, a membership may include

- Price book
- Accelerators™
- Data cuts
- Analyst access
- Virtual Roundtables
- Workshops

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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Topic	Page no.

Everest Group® RESEARCH

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Background of the research

Background of the research

- Rapid uptake of digital technologies, proliferation in digital touch-points, and consumerization of IT have made traditional enterprise security strategies obsolete, rendering security an inhibitor for digital transformation. Enterprise security priorities are becoming increasingly nuanced based on geography, operating vertical, and enterprise context (maturity, nature, scale, and model of business), amongst other factors
- To add to the conundrum, challenges such as security technology proliferation, user/customer education, and lack of skills/talent are making the security journey even more complex
- Consequently, enterprises are being pushed to take **a more guided and contextualized approach** toward security within business transformation, rather than just adopting "conventional best practices" prescribed in the broader market. In essence, enterprise security transformation journeys are akin to snowflakes – each journey being unique and contextual to the specific organization
- This theme is also manifesting strongly in the supply landscape – there is an increasing convergence of IT security service provider segments as various provider segments look to fill portfolio gaps and strengthen their "end-to-end" business-aligned security services play
- In this research, we present fact-based trends impacting the security services market, along with assessment and detailed profiles of 21 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 capabilities, scale of operations, key solutions, and partnerships
- The assessment is based on Everest Group's annual RFI process conducted over Q2 and Q3 2018, 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:** 21 leading IT service providers

This report includes the profiles of the following 21 service providers on the IT security services PEAK Matrix:

- **Leaders:** Accenture, DXC Technology, IBM, and Wipro
- **Major Contenders:** Capgemini, Cognizant, Fujitsu, HCL Technologies, Infosys, LTI, Luxoft, Mphasis, NTT DATA, Secureworks, TCS, Tech Mahindra, and Unisys
- **Aspirants:** Microland, Syntel, YASH Technologies, and Zensar

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

Focus of this research

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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), malware protection, managed web proxy, managed encryption, endpoint detection and response, etc.

Application security
Application security testing, application whitelisting, application self-protection, application control, web application security (including firewalls), sandboxing, SAST/DAST, code hardening, API management, SSL offloading, etc.

Identity and Access Management (IAM)
Multi-factor authentication, access management, user provisioning, password management, PKI, Identity-as-a-Service, privileged identity and access management, active directory services, single sign-on, 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 (IPS), Distributed Denial-of-Service (DDoS) prevention & mitigation, Unified Threat Management (UTM), VPN, network control, Advanced Persistent Threat (APT) solutions, network access control, etc.

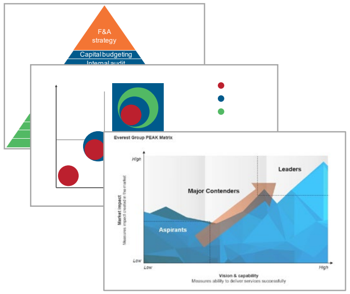
Risk management and compliance
IT Governance, Risk Management, and Compliance (GRC), threat intelligence, security analytics, cyber assurance, etc.

Cloud security
Security services specifically deigned for securing and governing virtual workloads and hybrid IT environments

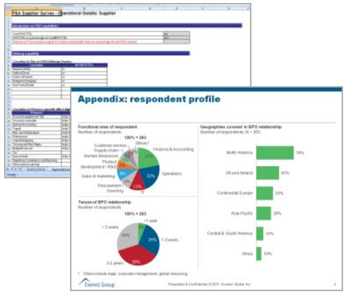
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

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

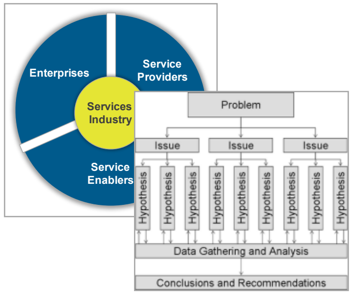
1 Robust definitions and frameworks
(F&A pyramid, multi-process FAO definition, Total Value Equation (TVE), PEAK Matrix™, market maturity)



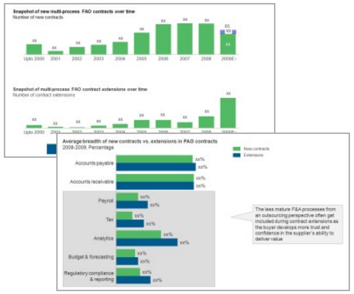
2 Primary sources of information
(Annual contractual and operational RFIs, service provider briefings and buyer interviews, web-based surveys)



3 Diverse set of market touchpoints
(Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both 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 security providers
- Dedicated team for IT infrastructure and IT security services adoption trends
- Over 25 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

- 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

- 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 LOBs
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed

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

- **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

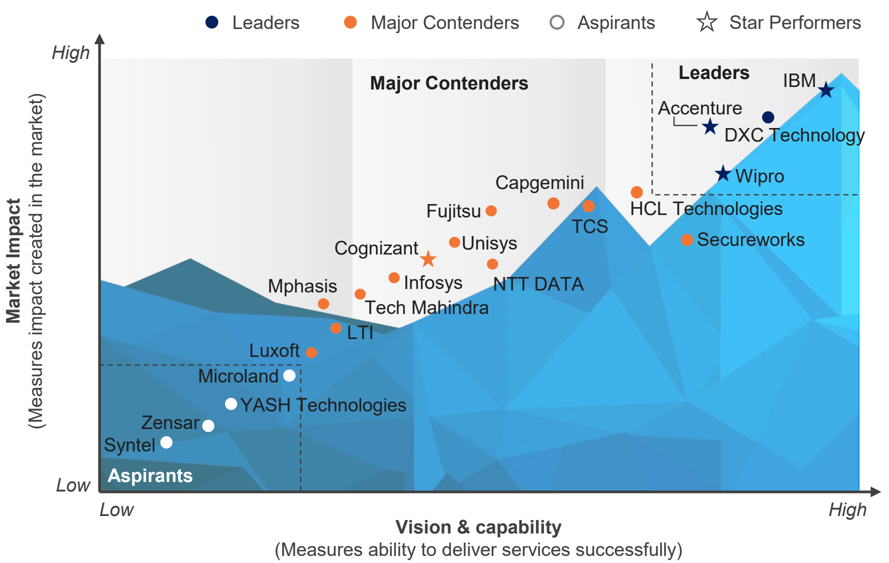
accenture, Capgemini, Cognizant, DXC.technology, FUJITSU, HCL, IBM, Infosys, LTI, LUXOFT, MICROLAND, Mphasis, NTT DATA, Secureworks, SYNTEL, TATA CONSULTANCY SERVICES, Tech Mahindra, UNISYS, wipro, YASH Technologies, ZenSar Technologies

Confidentiality: Assessment for Fujitsu, IBM, Secureworks, and Tech Mahindra excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers; analysis for Syntel is based on the assessment of its capabilities prior to the announcement of Syntel's acquisition by Atos
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 study offers a deep dive into key aspects of IT security services market

Everest Group PEAK Matrix™ for IT Security Services 2019[1,2]

Everest Group IT Security Services – Market Trends and PEAK Matrix™ Assessment 2019[1,2]



1 Assessment for Fujitsu, IBM, Secureworks, and Tech Mahindra excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

2 PEAK positioning for Syntel is based on the assessment of its capabilities prior to the announcement of Syntel's acquisition by Atos

Source: Everest Group (2018)

Capability assessment

Illustrative example

Measure of capability: High Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	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									
Service provider 9									

Everest Group's remarks on service providers

Illustrative example

Measure of capability: High Low

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

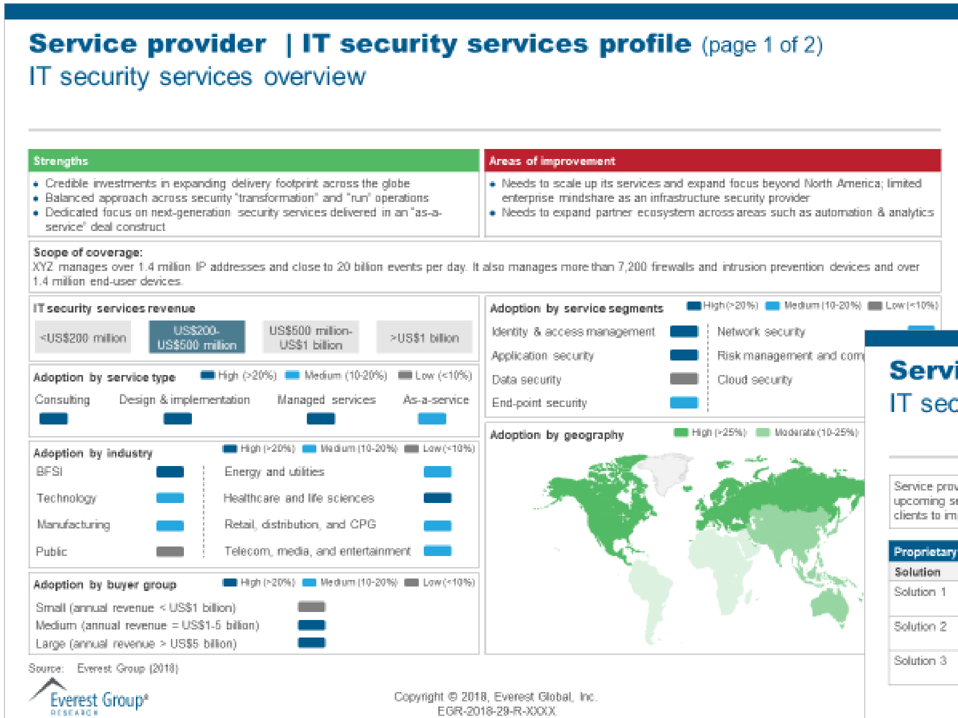
Strengths

- Service provider has a strong focus on extending localized consulting services and making investments aimed at building next-generation IT security portfolio across the security services stack
- Strong focus on integrating a vertical-specific story with IT security

Areas of improvement

- The service provider needs to improve balance in "transformation" and "run" services
- Proof points around large-scale transformation roadmaps are still limited in number

This report has 21 IT service provider profiles, focusing on their IT security services vision and strategy, scope of services, innovation and investments, and delivery footprint



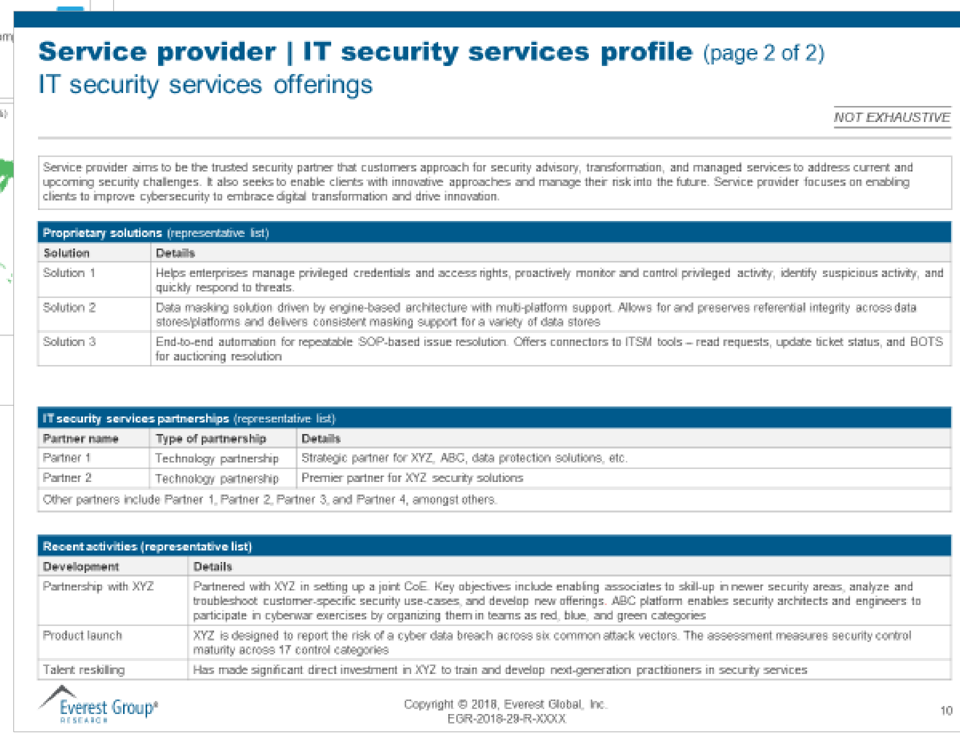
Service provider | IT security services profile (page 1 of 2)

IT security services overview

Strengths	Areas of improvement
• Credible investments in expanding delivery footprint across the globe • Balanced approach across security "transformation" and "run" operations • Dedicated focus on next-generation security services delivered in an "as-a-service" deal construct	• Needs to scale up its services and expand focus beyond North America; limited enterprise mindshare as an infrastructure security provider • Needs to expand partner ecosystem across areas such as automation & analytics

Scope of coverage:
XYZ manages over 1.4 million IP addresses and close to 20 billion events per day. It also manages more than 7,200 firewalls and intrusion prevention devices and over 1.4 million end-user devices.

Source: Everest Group (2018)



Service provider | IT security services profile (page 2 of 2)

IT security services offerings

NOT EXHAUSTIVE

Service provider aims to be the trusted security partner that customers approach for security advisory, transformation, and managed services to address current and upcoming security challenges. It also seeks to enable clients with innovative approaches and manage their risk into the future. Service provider focuses on enabling clients to improve cybersecurity to embrace digital transformation and drive innovation.

Proprietary solutions (representative list)

Solution	Details
Solution 1	Helps enterprises manage privileged credentials and access rights, proactively monitor and control privileged activity, identify suspicious activity, and quickly respond to threats.
Solution 2	Data masking solution driven by engine-based architecture with multi-platform support. Allows for and preserves referential integrity across data stores/platforms and delivers consistent masking support for a variety of data stores
Solution 3	End-to-end automation for repeatable SOP-based issue resolution. Offers connectors to ITSM tools – read requests, update ticket status, and BOTS for auctioning resolution

IT security services partnerships (representative list)

Partner name	Type of partnership	Details
Partner 1	Technology partnership	Strategic partner for XYZ, ABC, data protection solutions, etc.
Partner 2	Technology partnership	Premier partner for XYZ security solutions
Other partners include Partner 1, Partner 2, Partner 3, and Partner 4, amongst others.		

Recent activities (representative list)

Development	Details
Partnership with XYZ	Partnered with XYZ in setting up a joint CoE. Key objectives include enabling associates to skill-up in newer security areas, analyze and troubleshoot customer-specific security use-cases, and develop new offerings. ABC platform enables security architects and engineers to participate in cyberwar exercises by organizing them in teams as red, blue, and green categories
Product launch	XYZ is designed to report the risk of a cyber data breach across six common attack vectors. The assessment measures security control maturity across 17 control categories
Talent reskilling	Has made significant direct investment in XYZ to train and develop next-generation practitioners in security services

Research calendar – Cloud and Infrastructure Services

Published | Planned | Current release

Flagship CIS reports	Release date
Top 30 IT Security Trailblazers: Rise of the "Digital" Security Paradigm	January 2018
Digital Workplace Services – Market Trends and PEAK Matrix™ Assessment: Enterprise's Wish is Not Service Provider's Command!	June 2018
IT Infrastructure Services Automation – Market Update and PEAK Matrix™ Assessment for Solutions (Focus on IT Service Providers)	July 2018
Cloud & infrastructure Services Annual Report 2018	July 2018
Cloud Enablement Services – Market Trends and PEAK Matrix™ Assessment	November 2018
IT Security Services – Market Trends & PEAK Matrix™ Assessment	**December 2018**

Thematic CIS reports	
Upcoming Contract Renewals – Infrastructure Services	February 2018
Enterprise Pulse	March 2018
Enterprise Primer for Artificial Intelligence & Machine Learning	Q3 2018
Viewpoint – Demystifying IT infrastructure services automation	Q3 2018
BigTech Wars – Container orchestration	Q1 2019
Viewpoint – Security services automation and analytics: hype vs reality	Q1 2019

Note: For a list of all CIS reports published by us, please refer to our website page

Additional research references

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

1. **Cloud and Infrastructure Services – Annual Report 2018: "AI Stands to Make IT Infrastructure Services Invisible"** (EGR-2018-29-R-2720); 2018. The report provides insights across the comprehensive Infrastructure Services (IS) landscape. It covers global IT services market size and its distribution by service type, geography, and industry. The report also covers IS deal trends by buyer industry, buyer size, and buyer geography. Our annual research analyzes this theme and provides data-driven facts and perspectives on the overall cloud and Infrastructure Services market. Apart from the typical IS, the research also analyzes key trends in automation and real-time analysis

2. **IT Security Services – Top 30 IT Security Trailblazers: Rise of the "Digital" Security Paradigm** (EGR-2018-29-R-2540); 2018. Startups stand to play a key role in this new "digital security" paradigm by driving innovation across security segments through next-generation concepts such as orchestration, cloud-based security, artificial intelligence, and machine learning. In this research, we present an assessment of IT security startups, primarily focusing on their innovation, growth story, and the impact they have created in the market. We present detailed profiles of 30 IT security startups across security analytics, security automation and orchestration, endpoint security, cloud security, and IoT security

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

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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.

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