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RESEARCH

GDPR Services: Gross Disconnect in Perception and Reality – Services PEAK Matrix™ Assessment 2018

Application Services
Market Report – June 2018: Complimentary Abstract / Table of Contents

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PEAK MATRIX™

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- 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 and methodology of the research

Background of the research

- The European Union's adoption of General Data Protection Regulation (GDPR) has come into effect from May 2018. This legislation directly impacts all companies based in, or doing business with companies/individuals based in the European Economic Area (EEA), and has put pressure on organizations to comply with its stipulated requirements for data (both steady state and in-transit)
- Service providers are investing in developing capabilities in GDPR-related services not only to enable compliance for their clients but also for themselves. They are investing in the development of proprietary solutions, expansion of their partner ecosystem, and nurturing of their workforce to be GDPR-ready
- In this research, we present the assessment and detailed profiles of eight IT service providers featured on the GDPR services PEAK Matrix™. Each service provider profile presents a comprehensive picture of its service suite, scale of operations, and domain investments. The assessment is based on Everest Group's annual RFI process for the calendar year 2017, interactions with leading GDPR service providers, client reference checks, and an analysis of the GDPR services market

Scope of this report

- **Services:** GDPR services
- **Geography:** Global
- **Service providers:** Covers eight leading IT service providers

This report includes the profiles of the following eight service providers on the GDPR services PEAK Matrix:

- **Leaders:** Accenture and LTI
- **Major Contenders:** Cognizant, DXC Technology, HCL Technologies, TCS, and Wipro
- **Aspirants:** Tech Mahindra

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This report focuses on GDPR services and provides insights into leading service providers

Focus of this report

IT system integrators
Service providers that help clients manage their systems for GDPR enablement

Data specialists
Firms that specialize in handling data (at rest and in-motion) – includes technology firms and niche startups

Consulting firms
Native legal firms that provide legal advice and handle regulatory obligations for enterprises

Legal firms
Native consulting firms that provide strategic advisory and consulting services for GDPR enablement

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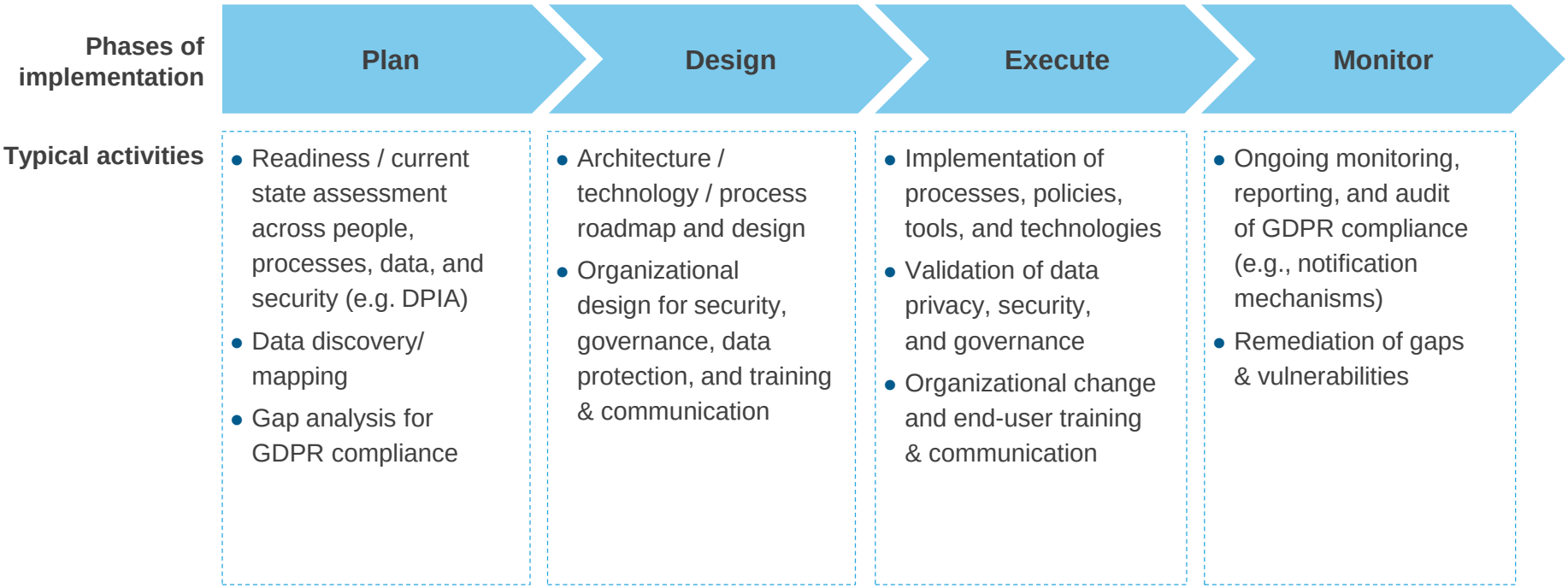
This report focuses on GDPR services and provides insights into leading service providers

ILLUSTRATIVE



This report provides insights into delivery capabilities, domain investments, focus on verticals, type of GDPR services, and partnerships of these service providers.

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This report is based on four key sources of proprietary information

- Everest Group's annual RFI process with leading GDPR service providers, followed by briefing sessions with their leadership teams and buyer reference conversations
- Key elements covered in these interactions include:
  - Vision and strategy for GDPR services
  - Scale of operations and delivery locations
  - Areas of investment (partnerships, Mergers & Acquisitions (M&As), Intellectual Property (IP), innovation, etc.)
  - Recent transaction history

- 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 (LoBs)

- **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 GDPR services
  - Assessment of service provider performance
  - Emerging priorities
  - Lessons learnt and best practices adopted

Service providers assessed

accenture
Cognizant
DXC.technology
HCL
LTI Let's Solve
Tech Mahindra
TATA CONSULTANCY SERVICES
wipro

Note: Assessment for DXC Technology includes partial inputs from the service provider, and is based on Everest Group's estimates that leverage its proprietary data assets, service provider public disclosures, and interaction with buyers

The source of all content is Everest Group unless otherwise specified

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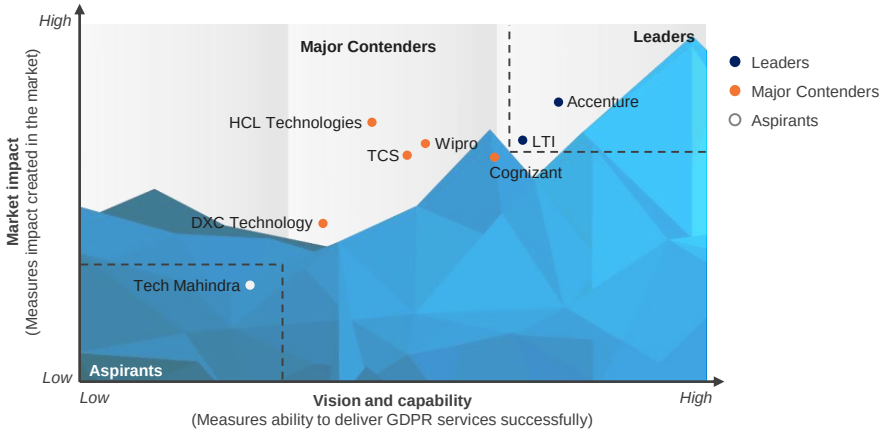
This study analyzes the GDPR services market and provides an assessment of the leading providers of GDPR services

Everest Group PEAK Matrix™ for GDPR Services



Note: 1 Assessment for DXC Technology includes partial inputs from the service provider, and is based on Everest Group's estimates that leverages its proprietary data assets, service provider public disclosures, and interaction with buyers

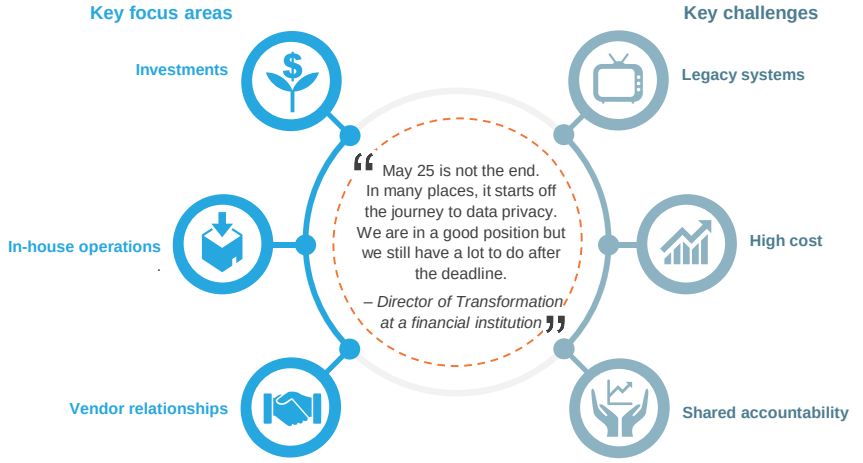
Capability assessment

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	◔	◑	◕	◔	◕	◔	◑	◑	◑

Enterprises' response to GDPR



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 1 structured methodology for GDPR implementation, combined with its broad service catalog, has resonated well with clients
- Its investments in talent development, domain understanding, and thought leadership have provided it credibility in the market

Areas of improvement

- Service provider 1 would benefit from expanding its partner ecosystem to take a holistic proposition to its clients beyond its core capabilities
- It should also aggressively market its marquee success stories in the market and actively target European customers to expand its GDPR presence in the region

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Research calendar – Application Services

Published | Planned | Current release

Flagship Application Services reports	Release date
Application Modernization Services – PEAK Matrix™ Assessment and Market Trends 2017	November 2017
Enterprise QA Services – PEAK Matrix™ Assessment and Market Trends 2018	May 2018
Application Services – Annual Report 2018: The Future of Architecture is Intelligent	June 2018
GDPR Services: Gross Disconnect in Perception and Reality – Services PEAK Matrix™ Assessment 2018	**Q2 2018**
DevOps PEAK Matrix™ Assessment and Market Update 2018	Q3 2018
Automation in Application Dev-test PEAK Matrix™ Assessment and Market Update	Q3 2018

Thematic Application Services reports	
Reimagining Application Delivery with Enterprise Crowd-development	Dec 2017
Application Performance in the Digital Age: Adopting AI is Not Optional	January 2018
Upcoming Contract Renewals – Application Services 2018	February 2018
The Great Digital Divide: Is Customer Dissatisfaction the New Normal?	March 2018
Closing the Gap - The Future of IT Skills in the United States	April 2018
Reimagining Enterprise IT Services Sourcing	May 2018
Securing the SDLC: Now is a good time to start	Q3 2018

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Additional Application Services research references

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

1. **EU GDPR: Is There a Silver Lining to the Disruption?**(EGR-2018-32-V-2347); 2017. This viewpoint aims to look beyond the short-term impact (tactical changes to achieve GDPR compliance) at the long-term and far-reaching strategic impact on the key components of global services delivery strategies: Process, Sourcing models, Service providers, Locations, Governance, and Contracting; and try to assess whether the disruption caused by the regulation has a silver lining (e.g., opportunities for transformation and push towards consolidation).

2. **IT Security Services – Market Trends and PEAK Matrix™ Assessment: "Security – The Biggest Digital Insecurity"** (EGR-2017-4-R-2310); 2017. 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.

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