Everest Group® RESEARCH

IT Security Services PEAK Matrix® Assessment 2020

Cloud and Infrastructure Services
Market Report – June 2020: Complimentary Abstract / Table of Contents

Everest Group
PEAK MATRIX®

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	▶ Human Resources
▶ BPS | Banking & Financial Services	▶ ITS | Banking & Financial Services
▶ BPS | Healthcare & Life Sciences	▶ ITS | Healthcare
▶ BPS | Insurance	▶ ITS | Insurance
▶ Catalyst™	▶ IT Services Executive Insights™
▶ Cloud & Infrastructure	▶ ITS | Life Sciences
▶ Customer Experience Management Services	▶ Locations Insider™
▶ Data & Analytics	▶ PricePoint™
▶ Digital Services	▶ Procurement
▶ Engineering Services	▶ Recruitment & Talent Acquisition
▶ Enterprise Platform Services	▶ Service Optimization Technologies
▶ Finance & Accounting	

Membership information

- This report is included in the following research program(s)
  – Cloud and Infrastructure Services (CIS)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- 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 provider 1s, locations, risk
- Other | Market intelligence, Service provider 1 capabilities, technologies, contract assessment

Everest Group®
RESEARCH

Table of contents

Table of contents

Background of the research

- Accelerated adoption of digital technologies, exponential rise in digital touch-points, consumerization of IT, and convergence of IT-OT environments have made traditional enterprise security strategies obsolete. Enterprise movement toward programmable lean hybrid infrastructure, exacerbated by adoption of cloud, microservices, containers, DevOps, etc., has brought upon considerable strain on IT security personnel to protect enterprise reputations by thwarting threat actors – which have become more prevalent and sophisticated over time

- Enterprises today have an increasingly interconnected environment, leading to increased attack surfaces. While enterprises grapple with the challenges of balancing business agility and resilience, threats continue to become more sophisticated. Consequently, 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

- Proliferation of security technology offerings in the market, with management complexities, and talent crunch are pushing enterprises to seek third-party support. Service providers are helping enterprises clear the clutter and stay steadfast on their digital transformation journey, underpinned by strong security foundations

- In this research, we present an assessment of 22 IT service providers featured on the IT security services PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over Q4 2019 and Q1 2020, 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:
22 leading IT security service providers

This report assessed the following 22 service providers on the IT security services PEAK Matrix:

Leaders: Accenture, DXC Technology, HCL Technologies, IBM, TCS, and Wipro
Major Contenders: Atos, Capgemini, Cognizant,, Fujitsu, Happiest Minds, Infosys, LTI, Mphasis, NTT DATA, Orange Cyberdefense, Secureworks, and Unisys
Aspirants: GAVS Technologies, Microland, YASH Technologies, and Zensar

Everest Group®
RESEARCH

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

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), 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

Everest Group®
RESEARCH

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**
PEAK Matrix, market maturity, and technology adoption/investment

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

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 service providers
- Dedicated team for researching IT security services and 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

This report is based on four key sources of proprietary information

- Proprietary database of 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 & ACV, service provider FTEs, start & 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 communication 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 AtoS Capgemini Cognizant

DXC.technology FUJITSU HCL GAVS

happiest minds The Mindful IT Company IBM Infosys LTI

MICROLAND Extraordinary. Everyday. Mphasis The Next Applied NTT DATA

Orange Cyberdefense Secureworks TATA CONSULTANCY SERVICES

UNISYS Securing Your Tomorrow wipro YASH Technologies More than what you think. ZenSar TECHNOLOGIES Your Transformation Partner

Note: Assessment for Fujitsu, IBM, Infosys, Secureworks, and Unisys 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; **The source of all content is Everest Group unless otherwise specified**

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry 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 2020[1]

Legend: ● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers

Market impact (Measures impact created in the market) — vertical axis: High / Low

Vision & capability (Measures ability to deliver services successfully) — horizontal axis: Low / High

Quadrants: Major Contenders, Leaders, Aspirants

Providers plotted:
- IBM (Leader)
- Accenture ☆ (Leader)
- TCS ★ (Leader)
- Wipro ★ (Leader)
- DXC Technology (Leader)
- HCL Technologies ★ (Leader)
- Capgemini ☆ (Major Contender)
- Atos (Major Contender)
- Cognizant (Major Contender)
- Infosys (Major Contender)
- Unisys (Major Contender)
- Fujitsu (Major Contender)
- Mphasis (Major Contender)
- LTI ★ (Major Contender)
- Orange Cyberdefense (Major Contender)
- Secureworks (Major Contender)
- NTT DATA (Major Contender)
- Happiest Minds (Major Contender)
- Microland (Aspirant)
- GAVS Technologies (Aspirant)
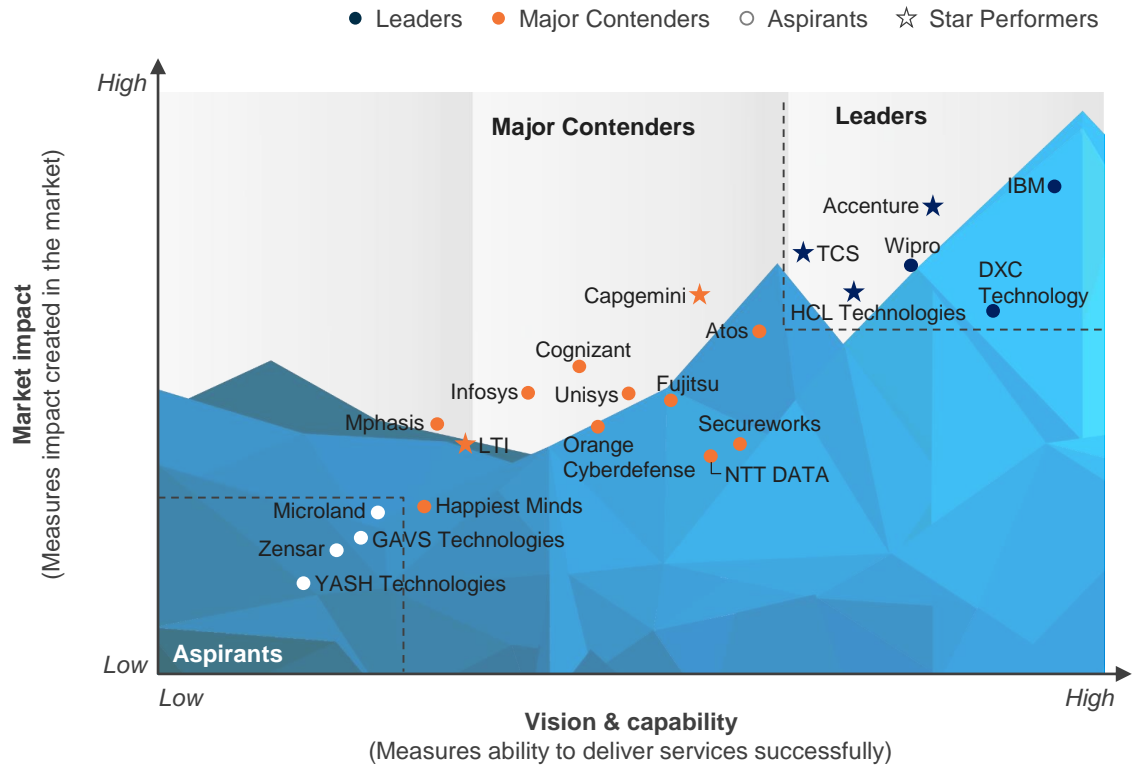- Zensar (Aspirant)
- YASH Technologies (Aspirant)

[1] Assessment for Fujitsu, IBM, Infosys, Secureworks, and Unisys 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

Source: Everest Group (2020)

Capability assessment

Illustrative example

Measure of capability: ● High ◐ Low

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

Strengths
- Service provider provides a comprehensive portfolio of IT security services, built on an approach focused on business resilience and brand trust protection. It strategically positions digital trust as a core tenet of enterprise digital transformation in market conversations
- There is emphasis on industry contextualization within IT security services go-to-market, backed by continuous investments in infusing industry-specific nuances into security services solutions. Focuses on co-innovation with clients through joint ventures or co-investment engagements

Areas of improvement
- While service provider has made considerable investments to strengthen managed security services offerings, its portfolio lags other Leaders in scale and enterprise mindshare
- Service provider has followed an acquihire strategy to enhance talent availability and skills, but internal training/guidance needs further improvement. It has scope to develop business skills of top-level technical practitioners in order to accentuate strategic partnerships with clients

Everest Group® RESEARCH

This report has 22 IT service provider profiles focussing on their strengths and areas of improvement

Service provider
Everest Group assessment – Leader

Measure of capability: ● High ◐ Low

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

Strengths

- Service provider provides a comprehensive portfolio of IT security services, built on an approach focused on business resilience and brand trust protection. It strategically positions digital trust as a core tenet of enterprise digital transformation in market conversations
- There is emphasis on industry contextualization within IT security services go-to-market, backed by continuous investments in infusing industry-specific nuances into security services solutions. Focuses on co-innovation with clients through joint ventures or co-investment engagements
- It has invested in acquisitions and ventures to enhance capabilities and broaden delivery scale through acquihiring. Has made significant market impact through 10+ IT security-specific acquisitions and venture investments in the last five years
- Service provider differentiates through a strong IP portfolio focused on next-generation demand themes such as IT-OT convergence, IoT, 5G, and AI. It possesses an extensive partner ecosystem built on global alliances with a co-development agenda
- Enterprise buyers have identified depth and breadth of expertise, thought leadership in strategy and architecture, and talent management as key strengths
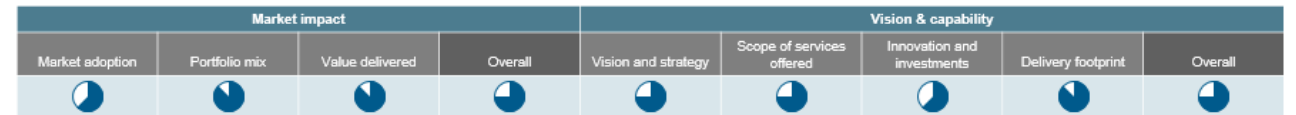
Areas of improvement

- While service provider has made considerable investments to strengthen managed security services offerings, its portfolio lags other Leaders in scale and enterpri[...]
- It is perceived as a premium partner. Enterprise buyers have pointed o[...] cost of services against the value delivered – with few enterprises stati[...] delivered ratio is more balanced during consulting/design and impleme[...] management/run stages
- Service provider has followed an acquihire strategy to enhance talent [...] internal training/guidance needs further improvement. It has scope to c[...] top-level technical practitioners in order to accentuate strategic partner[...]
- Enterprise buyers expect improvement in proactiveness and flexibility [...] agreed statements of work

Service provider
Everest Group assessment – Major Contender

Measure of capability: ● High ◐ Low

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

Strengths

- Service provider has identified cybersecurity as one of the seven group priorities and has made investments in creating a unified cybersecurity go-to-market structure under a global practice with a stand-alone leadership position
- Offers commercial and delivery flexibility through consumption-based modular offerings and combination of engagement models for enterprises to consume the portfolio of security services
- Recent investments – tuck-in acquisition of XXX and ongoing acquisition of XXX could potentially strengthen and expand its security capability across IoT, edge, and AI. Moreover, these transactions will provide service provider with a strong delivery footprint in North America
- Strong local presence in Europe and rich experience with heavily regulated industries make service provider a viable service provider for enterprises with region-specific security requirements such as data residency and privacy
- Has credible thought leadership capabilities under the service provider Invent brand
- Enterprise buyers have appreciated service provider's in-depth knowledge of enterprise environment, flexibility, and technical capabilities

Areas of improvement

- While service provider is trying to build industry-specific IT security services through "sectorial-specific developments," it needs to accelerate and increase investments to gain market mindshare
- It possesses an end-to-end portfolio of IT security services from consulting to managed services. However, service provider lags peers in strength, maturity, and market impact creation of IPs around data and network security
- Possesses credible consulting capabilities, but faces challenge in driving synergies between consulting and management delivery teams
- Enterprise buyers have pointed out that it should be more proactive in driving innovation and more effective in leveraging and utilizing knowledge that resides across various parts of the organization
- Offers considerable commercial flexibility for enterprises, but few enterprise buyers have noted a need to bring in greater transparency and responsiveness

Everest Group® RESEARCH

Research calendar – Cloud and Infrastructure Services

■ Published	▊ Planned	⬚ Current release

Flagship CIS reports	Release date
Network Transformation and Managed Services PEAK Matrix® Assessment 2020: Transform your Network or Lie on the Legacy Deathbed	December 2019
Network Transformation and Managed Services PEAK Matrix® Assessment 2020 – Focus on Communications Service Provider	March 2020
IT Security Services PEAK Matrix® Assessment 2020	**June 2020**
State of the Market: IT Security Services 2020	Q2 2020
Aware IT Infrastructure Automation Services PEAK Matrix® Assessment 2020	Q2 2020
State of the Market: Aware IT Infrastructure Automation Services	Q2 2020
Digital Workplace Services PEAK Matrix® Assessment 2020	Q3 2020
State of the Market: Digital Workplace Services 2020	Q3 2020
AWS Cloud Services PEAK Matrix® Assessment 2020	Q4 2020
Azure Cloud Services PEAK Matrix® Assessment 2020	Q4 2020
GCP Cloud Services PEAK Matrix® Assessment 2020	Q4 2020

Thematic CIS reports	
Connected Workplace – The Next Experience Frontier	January 2020
Enterprise Pulse Report: The Dissatisfaction Conundrum	January 2020
Upcoming Contract Renewals – Infrastructure Services	March 2020
Security operations for a digital world	Q3 2020

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

Everest Group®
RESEARCH

Additional Cloud and Infrastructure Services research references

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

1. **Cloud and Infrastructure Services – Annual Report 2019: Exploring the Enterprise Journey Toward "Invisible" IT Infrastructure** (EGR-2019-29-R-3406); 2019: This report explores enterprises' shift toward invisible infrastructure, which is agile and adapts to changing business needs (intelligent), delivers seamlessly across stacks through open architectures (interoperable), and protects the business (invincible).The report also provides insights into the overall IS landscape, including buyer analysis across industries, geographies, and revenue segments; the global IT services market size; and its distribution by service type, geography, and industry

2. **Upcoming Contract Renewals – Infrastructure Services** (EGR-2020-29-R-3594); 2019: Buyers of infrastructure services, especially long-term engagements having multiple towers in scope, are driving the productivity agenda hard and are not averse to considering alternative Service providers to tackle declining productivity levels. This research analyzes renewals coming up in the next two years, with a focus on Infrastructure Services (IS) contracts

3. **Top 10 SD-WAN Trailblazers: The Missing "Link" in Enterprise Digital Transformation Story** (EGR-2019-29-R-3410); 2019: The traditional WAN architecture is suboptimal to meet the demands of enterprise digital transformation initiatives. Software Defined Wide Area Network (SD-WAN) is emerging as a key transformation lever to address these challenges. Multiple start-ups have emerged to serve this space and drive innovation across network segments through next-generation concepts. This report provides market trends in SD-WAN along with the detailed profiles and assessment of 10 SD-WAN start-ups providing services and solutions such as edge SD-WAN appliances, multi-cloud connectivity, enhanced application performance, branch platforms, optimized bandwidth usage, cloud security, and managed SD-WAN

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

Ashwin Venkatesan, Vice President   ashwin.venkatesan@everestgrp.com

Sarweshwer Gupta, Senior Analyst   sarweshwer.gupta@everestgrp.com

Zachariah K Chirayil, Senior Analyst   zachariah.chirayil@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com

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.

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-416-388-6765

Stay connected

Website

www.everestgrp.com

Social Media

@EverestGroup

@Everest Group

Blog

www.everestgrp.com/blog/