

IT Security Service Provider Compendium 2020

Cloud and Infrastructure Services

Market Report – June 2020: Complimentary Abstract / Table of Contents

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
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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 providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Topic	Page no.
Introduction and overview	5
Section I: PEAK Matrix® for IT security services	10
Section II: Profiles of IT security service providers	22
• Accenture	23
• Atos	26
• Capgemini	29
• Cognizant	32
• DXC Technology	35
• Fujitsu	38
• GAVS Technologies	41
• Happiest Minds	44
• HCL Technologies	47
• IBM	50
• Infosys	53
• LTI	56
• Microland	59
• Mphasis	62
• NTT DATA	65
• Orange Cyberdefense	68
• Secureworks	71
• TCS	74
• Unisys	77

Topic	Page no.
Section II: Profiles of IT security service providers (continued)	22
• Wipro	80
• YASH Technologies	83
• Zensar	86
Appendix	89
• Glossary of terms	90
• Research calendar	91
• References	92

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

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

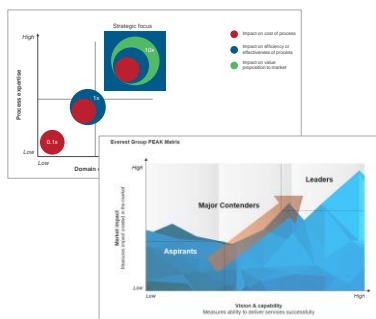
Security services – market definition

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

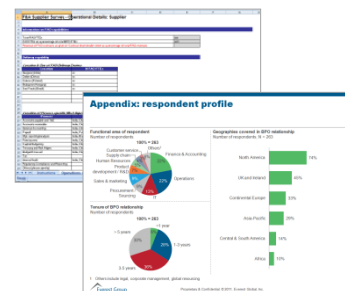
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

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

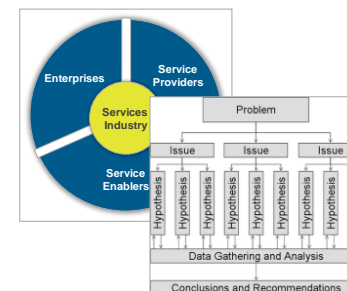
- 1 Robust definitions and frameworks**
PEAK Matrix®, market maturity, and technology adoption/investment



- 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
 - Revenue split by region
 - Number of clients
 - Location and size of delivery centers
 - FTE split by different LOBs
 - Technology solutions developed
-
- **Service provider briefings**
 - Vision and strategy
 - Key strengths and improvement areas
 - Annual performance and future outlook
 - 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

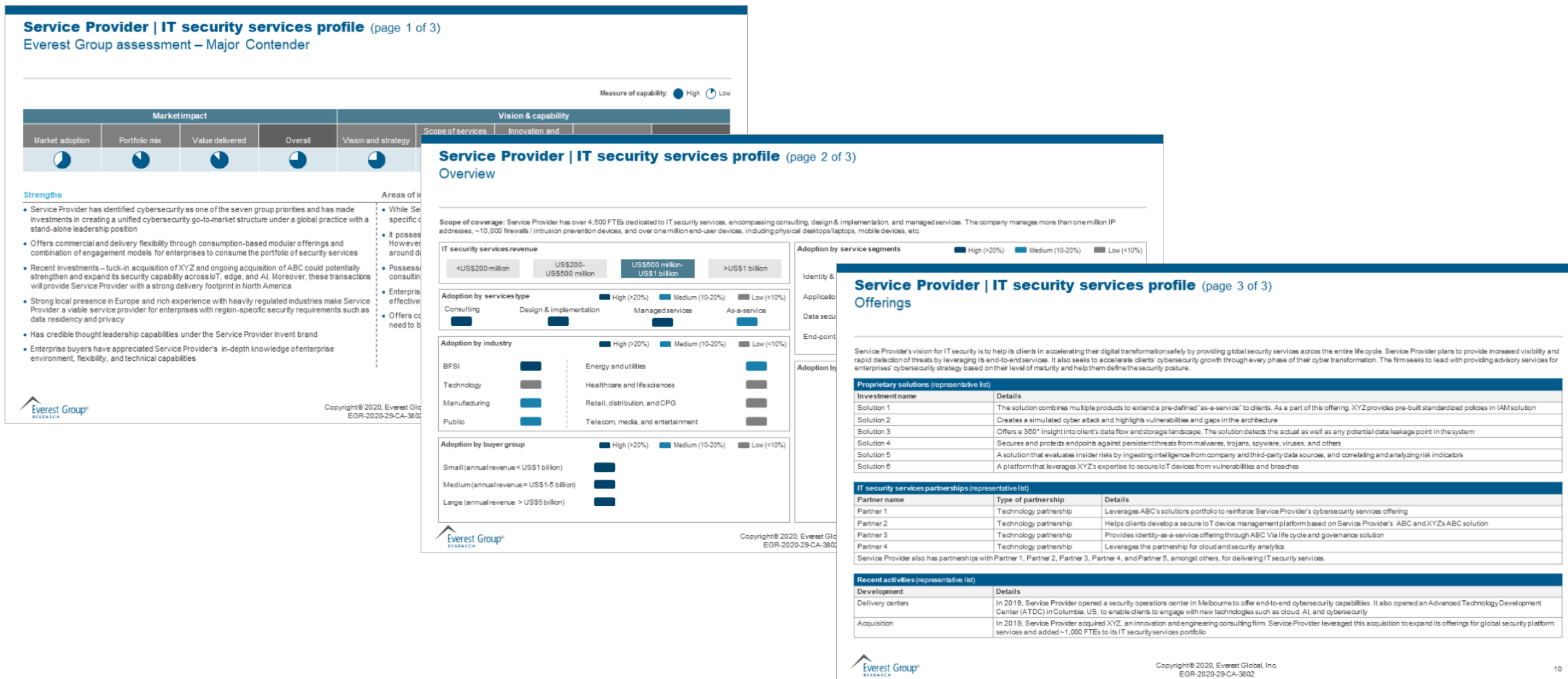
Service providers assessed



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 report has 22 IT service provider profiles, focussing on their IT security services vision and strategy, scope of services, innovation and investments, delivery footprint, and strengths and areas of improvement



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
IT Security Service Provider Compendium 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
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](#)

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. **IT Security Services PEAK Matrix® Assessment 2020** ([EGR-2020-29-R-3746](#)); 2020: As a part of this report, Everest Group updated its classification of 22 service providers on the Everest Group PEAK Matrix for IT security services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of IT security service providers based on their absolute market success and delivery capability
2. **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
3. **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

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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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