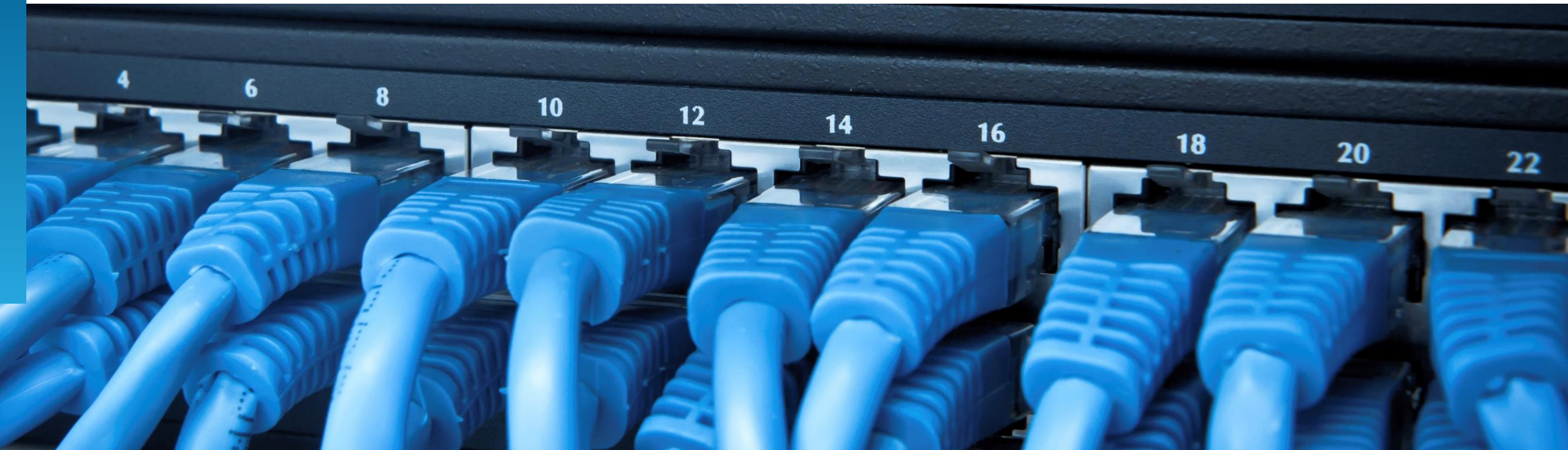


Digital Trust – The Cornerstone of Creating a Resilient and Truth-based Digital Enterprise

August 2020: Complimentary Abstract / Table of Contents



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

01

Robust definitions and frameworks

PEAK Matrix, market maturity, and technology adoption/investment

02

Primary sources of information

Annual, contractual, and operational RFIs, service provider briefings, and market feedback

03

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

04

Fact-based research

Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers

Proprietary contractual database of over 300 IT security services contracts (updated annually)

Year-round tracking of 30+ IT security service providers

Over 25 years of experience in advising clients on strategic IT, business services, engineering services, and sourcing 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 key IT security services market trends

Consulting/assessment services

Policy and process consulting, vulnerability assessment, audits, certification services, optimization and readiness assessment services

Design and implementation

Security architecture design and rearchitecting, security roadmap formulation, security implementation services, etc.

Management and monitoring services

device management, continuous monitoring (including remote monitoring through SOCs), incident management/response, and SIEM/SOAR

IT security services

End-point security

End-point security (end-points including desktops, mobile devices, and servers) – Host Intrusion Prevention Systems (HIPS), malware protection, managed web proxy, managed encryption, endpoint detection and response, etc.

Identity and Access Management

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

IoT security

IoT device and data protection, asset discovery and intelligence, IoT threat intelligence, communication channel security, pre-embedded IDs and encryption, API access control, and firmware update on IoT devices

Application security

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

Data security

Security services for structured and unstructured data: Data Loss Prevention (DLP), data encryption, protection & monitoring, database security, storage security, etc.

Cloud security

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

Risk management and compliance

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

Network security

Firewalls, email/URL gateways, Network Intrusion Prevention Systems (NIPS), Distributed Denial-of-Service (DDoS) prevention & mitigation, Unified Threat Management (UTM), VPN, network control, Advanced Persistent Threat (APT) solutions, network access control, etc.

Introduction to the research

Digital trust – the cornerstone of creating resilient and truth-based digital enterprise

- 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
- Amidst the rapid pace of business transformation and modernization, customer trust is going to be the pivotal element to build a sustainable future-proof business. Enterprises need to have a well-articulated strategy that helps them navigate around business changes, while adhering to privacy and compliance requirements
- The winning formula for enterprises is undergoing a sweeping shift – from positioning digital platforms and underlying data as the differentiator toward how enterprises use customer data. To build digital trust, enterprises will need to have dedicated focus on deploying the right information security technologies and processes to instill a sense of trust among business users as well as customers
- Establishing digital trust goes beyond having IT security controls in place. It involves a context-driven approach to protect personal information of customers, underpinned by security mechanisms that are seamless and simple
- The narrative for digital trust is now emerging from not just viewing cybersecurity as a cost center but as a key enabler to business growth, helping enterprises acquire new customers and businesses. Enterprises have realized that having robust IT security controls can help to create new services efficiently and rapidly, and build a loyal customer base
- The realization, that only securing the enterprise perimeter and incorporating point solutions for cybersecurity will not sustain in the long run, is forcing enterprises to focus on taking a more mature journey that aims at building digital trust with customers by taking a user-centric, fit-for-purpose approach toward IT security deployment

Scope of this report:



Geography
Global



Services
IT security services

Overview and abbreviated summary of key messages

Cybersecurity continues to be one of the key priorities for organizations worldwide. An enabler to the digital economy, cybersecurity helps protect enterprise assets, maintain business continuity, defend the brand name, and most importantly uphold the trust of the users. Traditional enterprise security strategies have become obsolete as enterprises adopt digital technology at an accelerating pace, thereby increasing the digital touchpoints in the user journey. This warrants the need to adopt the right cybersecurity technologies that not only adheres to the regulatory compliance but also serves as a key growth enabler by instilling a sense of trust among business users as well as end customers

Some of the findings in this report, among others, are:

IT security services market overview

- Infrastructure modernization, accelerated adoption of digital workplace, and proliferating endpoints have catapulted enterprise initiatives toward security transformation
- Demand for cloud native security controls, movement beyond compliance-driven data security controls, and PIM/PAM deployments have witnessed a demand uptick due to the COVID-19 pandemic

Digital trust

- Digital trust as a principle envisages to instill confidence among customers, business partners, and employees through enterprises' ability to maintain secure systems and perimeters to provide consistent and reliable experience to customers
- Digital trust needs to be built across four key pillars – user environment, data, applications, and device

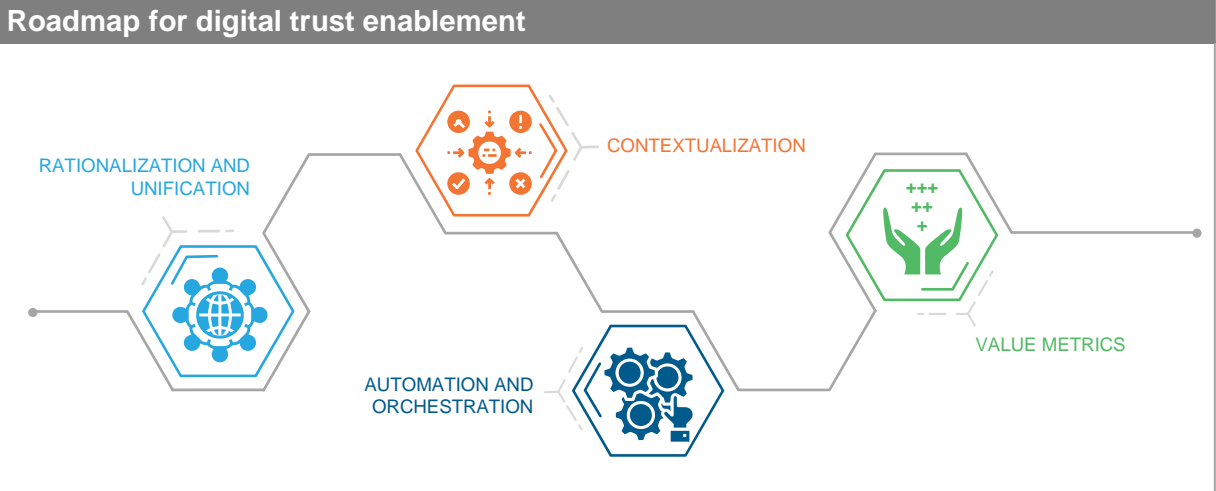
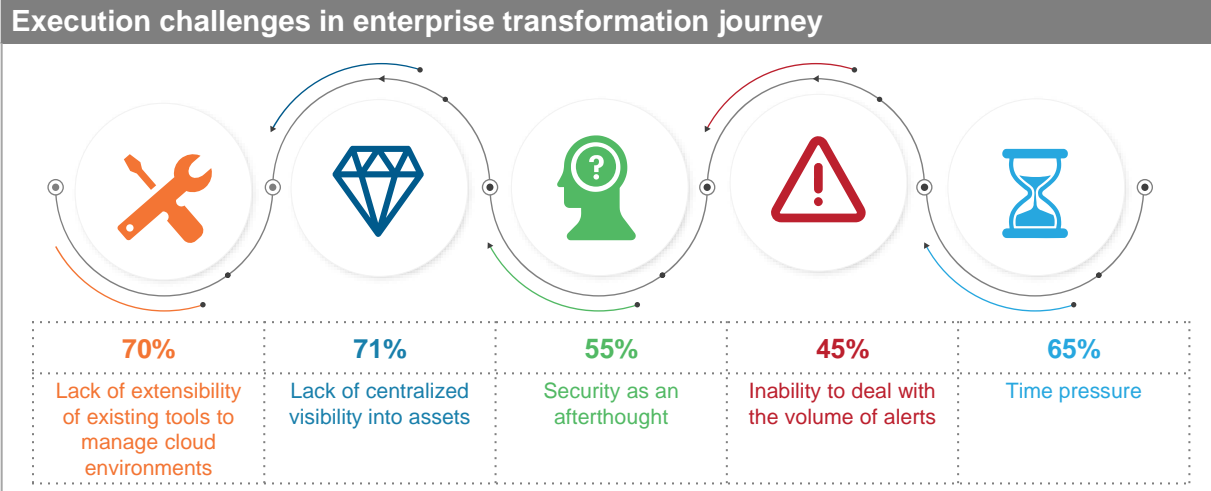
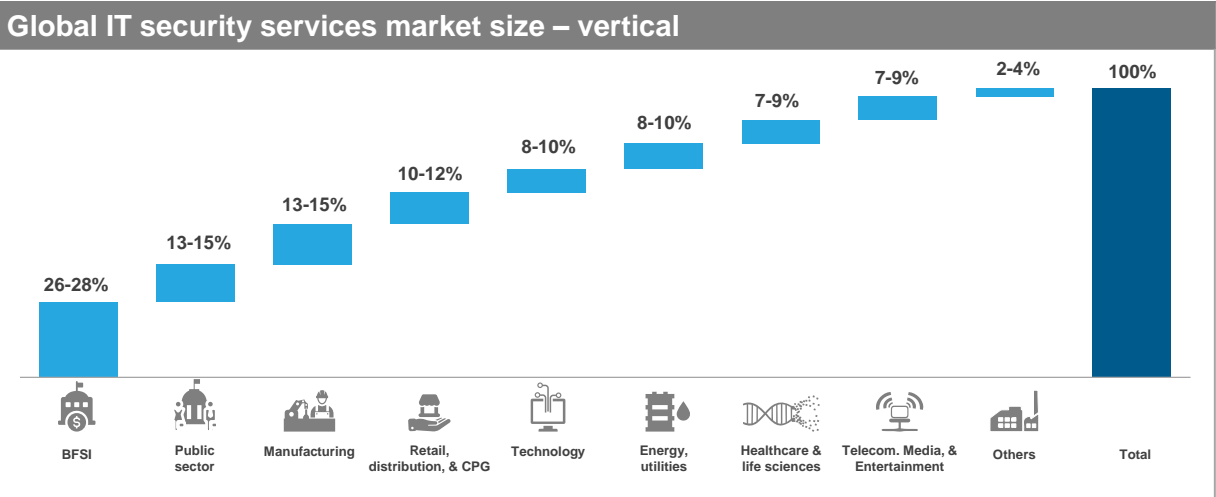
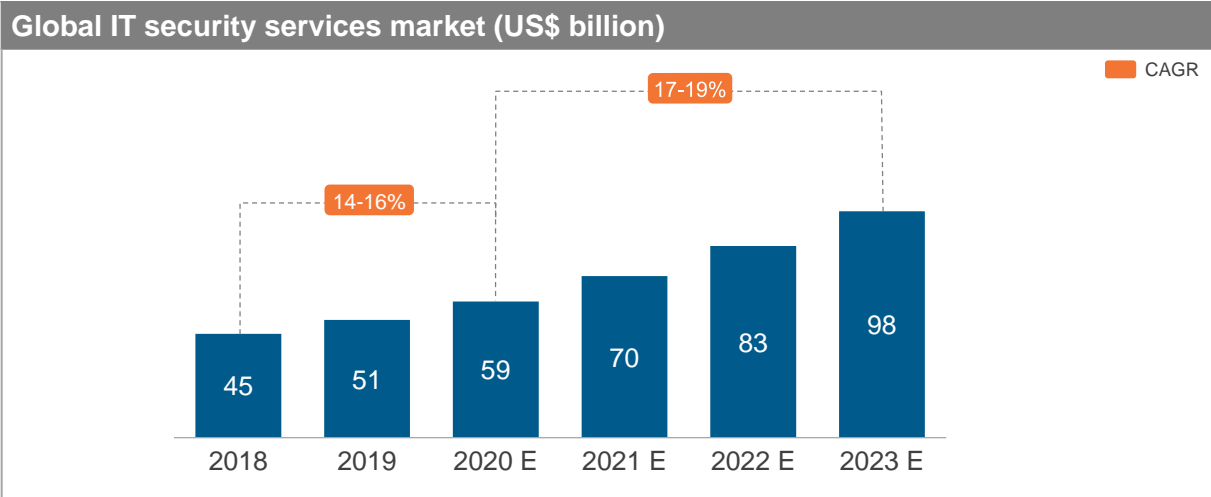
Digital trust model

- Digital trust mandates enterprise transformation journey to be anchored to business agility, business resilience, and user experience
- Enterprises need to align perimeter controls, security-by-design approach, and user privileges to deliver on the promise of digital trust. This involves a context-driven approach to protect sensitive customer information, underpinned by seamless security controls

Roadmap to digital trust

- The key to create a long-term and mutually beneficial trust is to balance the privacy of users and organization's information, with the ability to use that information to develop better products, experiences, and services
- Enterprises need to follow a clear roadmap for enabling digital trust by incorporating automation and orchestration, providing contextualized offerings, integrating value-based metrics for business value articulation of security, and ensuring rationalization and unification of solutions

This study offers two distinct chapters providing a deep dive into key aspects of IT security services market; below are four charts to illustrate the depth of the report



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 Providers	March 2020
IT Security Services PEAK Matrix® Assessment 2020	June 2020
Combating COVID-19 Through Infrastructure-led Transformation	July 2020
Digital Trust – The Cornerstone of Creating a Resilient and Truth-based Digital Enterprise	August 2020
Digital Workplace Services PEAK Matrix® Assessment 2020	August 2020
Aware IT Infrastructure Automation Services PEAK Matrix® Assessment 2020	Q3 2020
State of the Market: Digital Workplace Services 2020	Q3 2020
Service Integrator Capabilities on AWS PEAK Matrix® Assessment 2020	Q4 2020
Service Integrator Capabilities on Azure PEAK Matrix® Assessment 2020	Q4 2020
Service Integrator Capabilities on GCP PEAK Matrix® Assessment 2020	Q4 2020

Thematic CIS reports

Release date

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](#)



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