

# Cybersecurity Talent Handbook – Guide to Cybersecurity Skills Across the Globe

June 2021: Complimentary Abstract / Table of Contents



# Our research offerings

This report is included in the following research program(s):

[Locations Insider™](#)

- ▶ Application Services
- ▶ Banking & Financial Services BPS
- ▶ Banking & Financial Services ITS
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud & Infrastructure
- ▶ Conversational AI
- ▶ Contingent Workforce Management
- ▶ Cost Excellence
- ▶ Customer Experience Management Services
- ▶ Cybersecurity
- ▶ Data & Analytics
- ▶ Digital Adoption Platforms (DAP)
- ▶ Digital Services
- ▶ Engineering Services
- ▶ Enterprise Platform Services
- ▶ Finance & Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ Global Business Services
- ▶ Healthcare BPS
- ▶ Healthcare ITS
- ▶ Human Resources
- ▶ Insurance BPS
- ▶ Insurance ITS
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing (IDP)
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Executive Insights™
- ▶ Life Sciences BPS
- ▶ Life Sciences ITS
- ▶ Locations Insider™
- ▶ Market Vista™
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services & 5G
- ▶ Outsourcing Excellence
- ▶ Pricing-as-a-Service
- ▶ Process Mining
- ▶ Procurement
- ▶ Recruitment Process Outsourcing
- ▶ Rewards & Recognition
- ▶ Service Optimization Technologies
- ▶ Supply Chain Management (SCM) Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Workplace Services
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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](mailto:info@everestgrp.com)

Learn more about our [custom research capabilities](#)

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

# Contents

<b>1. Introduction and overview</b>	<b>4</b>
• Background and aim of this handbook	6
• Scope and coverage	7
• Assessment methodology	8
<b>2. Executive summary</b>	<b>9</b>
<b>3. Detailed assessment</b>	<b>14</b>
• Enablers	15
• Talent pulse	22
<b>4. Appendix</b>	<b>25</b>
• Supporting analysis – Enablers	26
• Supporting analysis – Talent pulse	36
• Research calendar – Locations Insider™	40

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

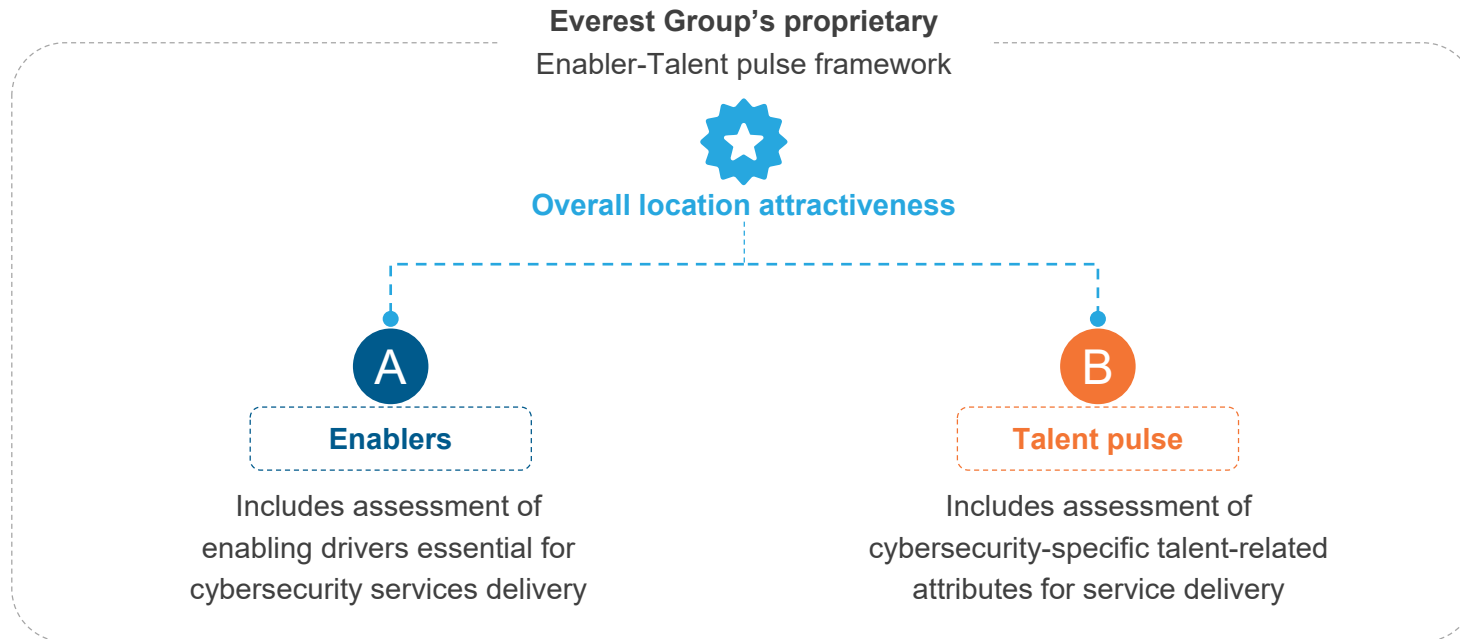
**Sakshi Garg**, Vice President

**Chaitanya Joshi**, Intern

## Background and aim of this handbook

Companies today have no choice but to implement cybersecurity systems, mechanisms, and policies. Cyber attacks are on the rise and small as well as large scale businesses are affected. Cyber threats have grown in scope, sophistication, and strategy, making the cybersecurity space more complex and difficult to tread. The pandemic has also led to a spike in phishing attacks, malware spams and ransomware attacks as attackers are using COVID-19 as bait to impersonate brands, thereby misleading employees and customers. Throughout the world, there has been a marked growth in ransomware and targeted phishing scams. Given the circumstances, it is more important than ever for companies to implement best cybersecurity practices, resulting in an increased demand for cybersecurity services delivery. In order to remain competitive, market players need to relook at their location strategies and evolve a delivery portfolio that integrates with the blueprint of their present day “Go Digital” agenda.

**This Everest Group handbook aims to support market players in their quest to identify the right location for supporting cybersecurity services. It highlights the relative attractiveness of leading global locations for supporting cybersecurity and allied services based on a holistic and multi-faceted assessment, covering 15+ parameters. At an overall level, this handbook covers the cybersecurity delivery attractiveness on two broad dimensions:**



Source: Everest Group (2021)

## Scope and coverage



The report focuses on delivery of cybersecurity services



**24 delivery locations** across geographies have been prioritized for assessment. These locations represent the most leveraged locations for cybersecurity services delivery in their respective geographies

North America	Asia Pacific	Latin America
<div data-bbox="290 815 384 872"></div> <div data-bbox="280 882 394 913">Canada</div> <div data-bbox="575 815 659 872"></div> <div data-bbox="591 882 639 913">US</div>	<div data-bbox="963 758 1047 815"></div> <div data-bbox="937 829 1072 861">Australia</div> <div data-bbox="1233 758 1317 815"></div> <div data-bbox="1233 829 1317 861">China</div> <div data-bbox="1505 758 1589 815"></div> <div data-bbox="1513 829 1582 861">India</div> <div data-bbox="963 876 1047 933"></div> <div data-bbox="937 948 1065 979">Malaysia</div> <div data-bbox="1233 876 1317 933"></div> <div data-bbox="1192 948 1358 979">Philippines</div> <div data-bbox="1505 876 1589 933"></div> <div data-bbox="1480 948 1625 979">Singapore</div>	<div data-bbox="1854 765 1939 822"></div> <div data-bbox="1829 836 1969 868">Argentina</div> <div data-bbox="2244 765 2328 822"></div> <div data-bbox="2244 836 2328 868">Brazil</div> <div data-bbox="1854 882 1939 939"></div> <div data-bbox="1829 953 1969 985">Colombia</div> <div data-bbox="2244 882 2328 939"></div> <div data-bbox="2219 953 2372 985">Costa Rica</div>
Middle East and Africa	Central and Eastern Europe (CEE)	Western Europe
<div data-bbox="295 1133 379 1190"></div> <div data-bbox="295 1205 379 1236">Israel</div> <div data-bbox="575 1133 659 1190"></div> <div data-bbox="591 1205 639 1236">UAE</div>	<div data-bbox="1047 1068 1131 1125"></div> <div data-bbox="1029 1148 1149 1179">Bulgaria</div> <div data-bbox="1421 1068 1505 1125"></div> <div data-bbox="1396 1148 1531 1179">Lithuania</div> <div data-bbox="1047 1200 1131 1258"></div> <div data-bbox="1029 1272 1131 1303">Poland</div> <div data-bbox="1421 1200 1505 1258"></div> <div data-bbox="1396 1272 1531 1303">Romania</div>	<div data-bbox="1760 1068 1844 1125"></div> <div data-bbox="1742 1148 1862 1179">England</div> <div data-bbox="2040 1068 2125 1125"></div> <div data-bbox="2023 1148 2142 1179">France</div> <div data-bbox="2321 1068 2405 1125"></div> <div data-bbox="2303 1148 2423 1179">Germany</div> <div data-bbox="1760 1200 1844 1258"></div> <div data-bbox="1742 1272 1862 1303">Ireland</div> <div data-bbox="2040 1200 2125 1258"></div> <div data-bbox="1997 1272 2168 1303">Netherlands</div> <div data-bbox="2321 1200 2405 1258"></div> <div data-bbox="2303 1272 2397 1303">Spain</div>



## Summary of key messages

1

Locations in North America and Western Europe have the **most favorable enabler ecosystem along with a moderately favorable talent pulse rating**. These locations offer excellent infrastructure, high innovation potential, and favorable business environments. However, the cost of operations is high in these locations, primarily driven by higher salaries and office rentals.

-----

**England and Germany have relatively higher talent pulse ratings**, given their large pools of experienced talent supporting a wide range of cybersecurity services.

2

Locations in Asia Pacific have **high to moderately favorable enabler ecosystems and talent pulse rating**. They offer an attractive talent pulse and enabler infrastructure proposition, with the presence of a sizable experienced talent pool and significant cost savings over source markets (e.g., the US and the UK).

-----

Among the APAC locations, **China and Singapore have the most favorable enabler ecosystems** driven by high IT penetration and developed cybersecurity infrastructures.

3

Central and Eastern European (CEE) locations have **high to moderately favorable enabler ecosystems and talent pulse ratings**. Most of these locations offer moderate cost savings over leading source locations in Western Europe. These locations offer favorable business dynamics driven by conducive cybersecurity policies and operating environment.

-----

**Poland has the most favorable talent pulse rating and enabler ecosystem**, driven by high adoption maturity and a favorable business environment.

4

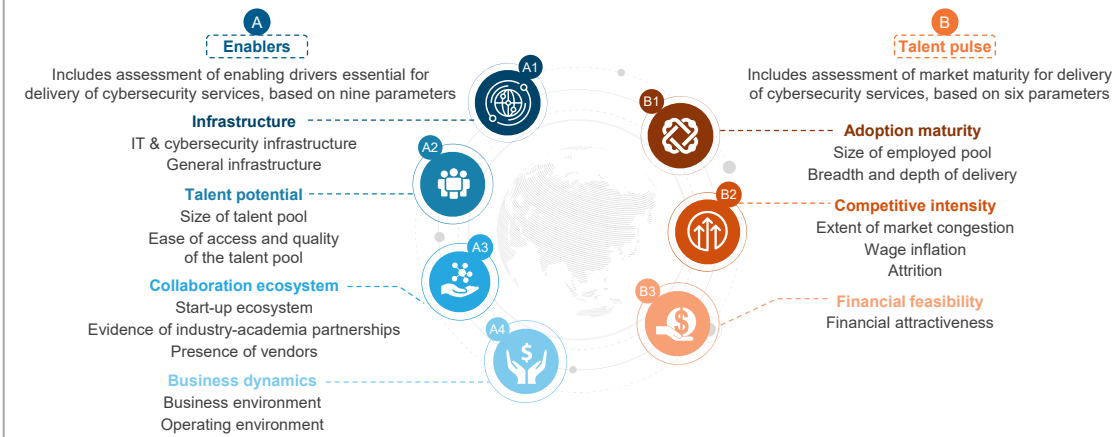
Most locations in Latin America (LATAM) and the Middle East and Africa (MEA) have **moderate enabler ecosystems and talent pulse ratings**, given smaller experienced talent pools. Cost of operations is low in LATAM locations. Market congestion is low in MEA locations, leading to lower saturation of the cybersecurity services market.

-----

**Israel offers a favorable enabler ecosystem**, with excellent general infrastructure and a favorable operating environment; however, the operating cost is also high.

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

## Assessment methodology



## Enablers | business environment

Location	ICT investment 2021; Rating	Security software investment 2021; Rating	Cyberlaws enforcement 2021; Rating	Cybersecurity awareness 2021; Rating	Cyberattack exposure 2021; Rating	Business environment 2021; Rating
<b>North America</b>						
Canada	Highly favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable
US	Highly favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable
Australia	Highly favorable	Highly favorable	Moderately favorable; some constraints	Highly favorable	Highly favorable	Highly favorable
<b>Asia Pacific</b>						
China	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Least favorable	Moderately favorable; some constraints
India	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Least favorable	Moderately favorable; some constraints
Malaysia	Moderately favorable; some constraints	Moderately favorable; some constraints	Highly favorable	Highly favorable	Highly favorable	Moderately favorable; some constraints
Philippines	Relatively lower investment in ICT	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Least favorable	Moderately favorable; some constraints
Singapore	Highly favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable
<b>Latin America</b>						
Argentina	Highly favorable	Moderately favorable; some constraints	Evidence of poor enforcement of cyber laws	Lower degree of cybersecurity awareness among masses	Accelerated digitalization not accompanied by adequate IT security policies	Moderately favorable; some constraints
Brazil	Highly favorable	Moderately favorable; some constraints	Evidence of poor enforcement of cyber laws	Lower degree of cybersecurity awareness among masses	Accelerated digitalization not accompanied by adequate IT security policies	Moderately favorable; some constraints
Colombia	Highly favorable	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Least favorable	Moderately favorable; some constraints
Costa Rica	Highly favorable	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints	Moderately favorable; some constraints

## Talent pulse | adoption maturity

Location	Employed pool 2021; '000 FTEs	Breadth and depth of delivery 2021; Rating	Adoption maturity 2021; Rating
<b>North America</b>			
Canada	Evidence of delivery of a broad range of cybersecurity services	Highly favorable	Highly favorable
US	Evidence of delivery of a broad range of cybersecurity services	Highly favorable	Highly favorable
Australia	Evidence of delivery of a broad range of cybersecurity services	Highly favorable	Highly favorable
<b>Asia Pacific</b>			
China	Evidence of delivery of a broad range of cybersecurity services	Moderately favorable; some constraints	Moderately favorable; some constraints
India	Evidence of delivery of a broad range of cybersecurity services	Highly favorable	Highly favorable
Malaysia	Evidence of delivery of a broad range of cybersecurity services	Moderately favorable; some constraints	Moderately favorable; some constraints
Philippines	Evidence of delivery of a broad range of cybersecurity services	Moderately favorable; some constraints	Moderately favorable; some constraints
Singapore	Evidence of delivery of a broad range of cybersecurity services	Highly favorable	Highly favorable
<b>Latin America</b>			
Argentina	Evidence of delivery of a broad range of cybersecurity services	Moderately favorable; some constraints	Moderately favorable; some constraints
Brazil	Cybersecurity services coverage limited to MDR and threat detection	Highly favorable	Highly favorable
Colombia	Cybersecurity services coverage limited to MDR and threat detection	Moderately favorable; some constraints	Moderately favorable; some constraints
Costa Rica	Cybersecurity services coverage limited to MDR and threat detection	Least favorable	Least favorable

## Talent pulse | financial feasibility

Location	Fully loaded annual operating cost 2021; '000s in US\$	Cost arbitrage with Dallas 2021; Percentage	Financial feasibility 2021; Rating
<b>North America</b>			
Canada		4-6%	Least favorable
US		-	Least favorable
<b>Asia Pacific</b>			
Australia		27-29%	Moderately favorable; some constraints
China		59-61%	Highly favorable
India		83-85%	Highly favorable
Malaysia		72-74%	Highly favorable
Philippines		79-81%	Highly favorable
Singapore		44-46%	Moderately favorable; some constraints
Argentina		84-86%	Highly favorable
<b>Latin America</b>			
Brazil		51-53%	Moderately favorable; some constraints
Colombia		73-75%	Highly favorable
Costa Rica		56-58%	Highly favorable

# Research calendar

## Locations Insider™

■ Published
 ■ Planned
 ■ Current release

### Flagship Locations Insider reports

### Release date

Location Spotlight – San Antonio, Texas, The United States	October 2020
Location Spotlight – Birmingham, The United Kingdom	December 2020
Location Spotlight – Nigeria	November 2020
Location Spotlight – Raleigh, The United States	December 2020
Location Spotlight – Coimbatore, India	January 2021
Location Spotlight – Lithuania	March 2021
Location Spotlight – Cali, Colombia	March 2021
Location Spotlight – Hungary	March 2021
Global Locations State of the Market 2021: Embracing Uncertainties in a Disrupted World   Risk Watch	March 2021
Global Locations State of the Market 2021   Key Trends Shaping the Landscape	Q2 2021
Global Locations State of the Market 2021   Locations PEAK Matrix®	Q2 2021

### Thematic Locations Insider reports

### Release date

Africa: Emerging IT-BP Delivery Force	July 2020
Leading European Locations for Global Delivery of Engineering Services	October 2020
Data & Analytics Handbook – Delivery Location Strategy to Steer Through Digital Disruption	November 2020
<b>Cybersecurity Talent Handbook – Guide to Cybersecurity Skills Across the Globe</b>	<b>June 2021</b>

Note: For a list of all of our published Locations Insider™ reports, please refer to our [website page](#)





Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global companies, service providers, and investors. Clients use our services to guide their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

## Stay connected

### Website

[everestgrp.com](http://everestgrp.com)

### Social Media

 [@EverestGroup](https://twitter.com/EverestGroup)

 [@Everest Group](https://www.linkedin.com/company/everestgrp)

 [@Everest Group](https://www.facebook.com/EverestGroup)

 [@Everest Group](https://www.youtube.com/EverestGroup)

### Blog

[everestgrp.com/blog](http://everestgrp.com/blog)

### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)

+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)

+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)

+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)

+44-207-129-1318

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)

+1-647-557-3475

*This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.*