

IT Security Services PEAK Matrix® Assessment 2022 – North America

July 2022: Complimentary Abstract / Table of Contents



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Background of the research

Organizations are leveraging IT security services to improve their security posture and prepare for challenges such as ransomware attacks and business disruptions. The COVID-19 pandemic has further accelerated the adoption of security services, buttressed by enterprise challenges, in securing a remote workforce. Another important factor that has significantly contributed to the rise of IT security services is the shortage of expert cybersecurity talent and rising CAPEX and OPEX in maintaining in-house security teams, especially during the great resignation period. The US federal government too has taken a serious stance against cybercriminals and has been proactive in making laws and issuing executive orders covering a wide variety of security challenges ranging from OT security to data privacy laws such as CCPA and GDPR. All these factors combined have resulted in a major uptick in IT security services demand across the North American geography.

In this research, we present an assessment and detailed profiles of 27 IT service providers for the IT security capabilities in the North American region featured on the **IT Security Services PEAK Matrix® Assessment 2022 – North America**. The assessment is based on Everest Group’s annual RFI process for the calendar year 2022, interactions with leading IT security service providers, client reference checks, and an ongoing analysis of the IT security services market.

This report includes the profiles of the following 27 leading IT security service providers featured on the IT Security Services PEAK Matrix – North America:

- **Leaders:** Accenture, HCL Technologies, IBM, TCS, and Wipro
- **Major Contenders:** AT&T, Atos, Capgemini, Cognizant, Deloitte, DXC Technology, EY, Infosys, KPMG, Kyndryl, LTI, Microland, Mphasis, NTT DATA, PwC, Tech Mahindra, and Zensar
- **Aspirants:** GAVS Technologies, Happiest Minds, ITC Secure, Mindtree, and Yash Technologies

Scope of this report



Geography
North America



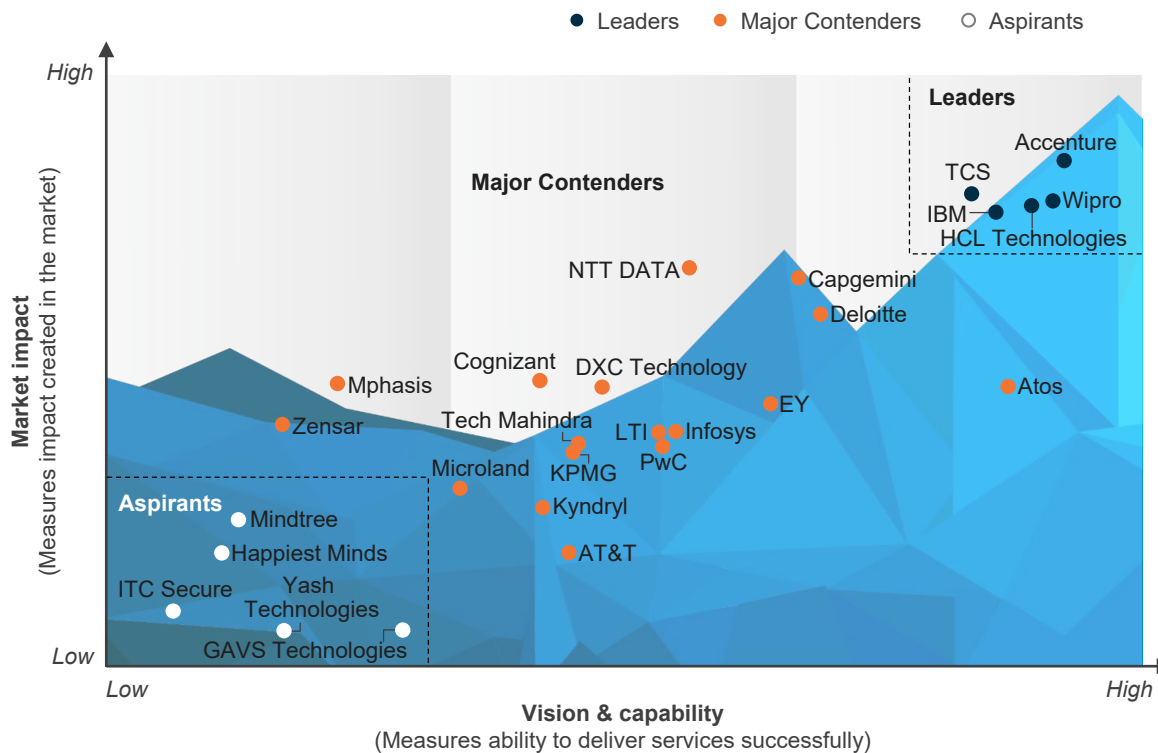
Providers
27



Services
IT Security Services

This study offers a deep dive into key aspects of IT security services market; below are three charts to illustrate the depth of the report

IT Security Services PEAK Matrix® Assessment 2022 – North America^{1,2}



1 Assessments for IBM, Capgemini, Deloitte, EY, KPMG, PwC, and AT&T based on Everest Group’s proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group’s interactions with enterprise buyers
2 Analysis for LTI and Mindtree is based on capabilities before their merger
Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🔄 Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 2	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 3	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 4	🔄	🔄	🔄	🔄	●	🔄	🔄	🔄	🔄
Provider 5	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 6	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 7	🔄	🔄	🔄	🔄	🔄	🔄	●	🔄	🔄
Provider 8	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄
Provider 9	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄	🔄

Everest Group’s remarks on providers

Illustrative example

Measure of capability: 🔄 Low ● High

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

- Enterprise buyers can benefit from Provider 1’s investment in building a dedicated cybersecurity advisory practice – Specialist 1, that primarily provides security assessments and risk quantification services
- Enterprise buyers have appreciated Provider 1 for its extensive security services such as XDR, SASE, zero-trust, converged IT OT, and DevSecOps

Limitations

- Clients have highlighted that Provider 1 needs to invest more in vertical-specific dedicated Security Operation Centers (SOCs) such as automotive SOC and connected car SOC
- Clients have expressed concerns about Provider 1’s lack of decisiveness and believe that Provider 1 should focus on bringing in more innovation

Research calendar

Cybersecurity

Published Planned Current release

Reports title	Release date
Supplier Management Toolkit: Cybersecurity Risk Management in the Supplier Life Cycle	January 2022
Getting to the Bottom of Zero Trust (ZT) Security	April 2022
Technology Vendor Snapshot for OT security	June 2022
IT Security Services PEAK Matrix® Assessment 2022 – North America	July 2022
IT Security Services PEAK Matrix® Assessment 2022: Europe	Q3 2022
State of the Market: IT Security Services	Q3 2022
IT Security Services North America Compendium 2022	Q3 2022
IT Security Services Europe Compendium 2022	Q3 2022

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