Everest Group®

Provider Compendium | Cybersecurity

IT Security Services Provider Compendium 2022 – North America

September 2022: Complimentary Abstract / Table of Contents

EGR-2022-65-CA-5417

Our research offerings

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

- Application Services
- Banking and Financial Services Business Process
- Banking and Financial Services Information Technology
- Catalyst™
- Clinical Development Technology
- Cloud and Infrastructure
- Contingent Staffing
- Contingent Workforce Management
- Conversational AI
- Customer Experience Management Services
- CX Excellence
- Cybersecurity
- Data and Analytics
- Digital Adoption Platforms (DAP)
- Digital Engineering Services
- Digital Services
- Digital Workplace
- Employee Experience Management (EXM) Platforms
- Employer of Record (EOR)
- Engineering Services
- Enterprise Platform Services
- Exponential Technologies
- Finance and Accounting
- Financial Services Technology (FinTech)
- Global Business Services
- Healthcare Business Process
- Healthcare Information Technology
- Human Resources Outsourcing
- Insurance Business Process
- Insurance Information Technology
- Insurance Technology (InsurTech)
- Insurance Third-Party Administration (TPA) Services
- Intelligent Document Processing (IDP)
- Interactive Experience (IX) Services
- IT Services Executive Insights™
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- Life Sciences Commercial Technologies
- Life Sciences Information Technology
- Locations Insider™
- Marketing Services
- Market Vista™
- Mortgage Operations
- Multi-country Payroll
- Network Services and 5G
- Outsourcing Excellence
- Pricing Analytics as a Service
- Process Mining
- Procurement
- Recruitment
- Retirement Technologies
- Revenue Cycle Management
- Rewards and Recognition
- Service Optimization Technologies
- Software Product Engineering Services
- Supply Chain Management (SCM) Services
- Sustainability Technology and Services
- Talent Excellence GBS
- Talent Excellence ITS
- Technology Skills and Talent
- Trust and Safety
- Work at Home Agent (WAHA) Customer Experience Management (CXM)

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custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Contents

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

01
Robust definitions and frameworks

Function specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02
Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03
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

04
Fact-based research

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

Proprietary contractual database of over 300+ cybersecurity contracts (updated annually)

Year-round tracking of 30+ security service providers

Large repository of existing research in cybersecurity

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

This report is based on two key sources of proprietary information

- Proprietary database of IT services contracts of major IT providers with cybersecurity services in the scope of work (updated annually)
- The database tracks the following elements of each contract:
  - Buyer details including size and signing region
  - Contract details including provider, contract type, TCV & ACV, 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 IT providers (updated annually)
- The database tracks the following for each 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

- 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 cybersecurity services
  - Assessment of provider performance
  - Emerging priorities
  - Lessons learned and best practices adopted

Providers assessed[1]

accenture, AT&T, Atos, Capgemini, cognizant, Deloitte., DXC TECHNOLOGY, EY, GAVS, happiest minds, HCL, IBM, Infosys, ITC SECURE, KPMG, kyndryl, LTI, MICROLAND, Mindtree, Mphasis, NTT DATA, pwc, TCS, Tech Mahindra, wipro, YASH Technologies, zensar

1 Analysis for LTI and Mindtree is based on capabilities before their merger

Note: **The source of all content is Everest Group unless otherwise specified**

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract-specific will only be presented back to the industry in an aggregated fashion

Introduction

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

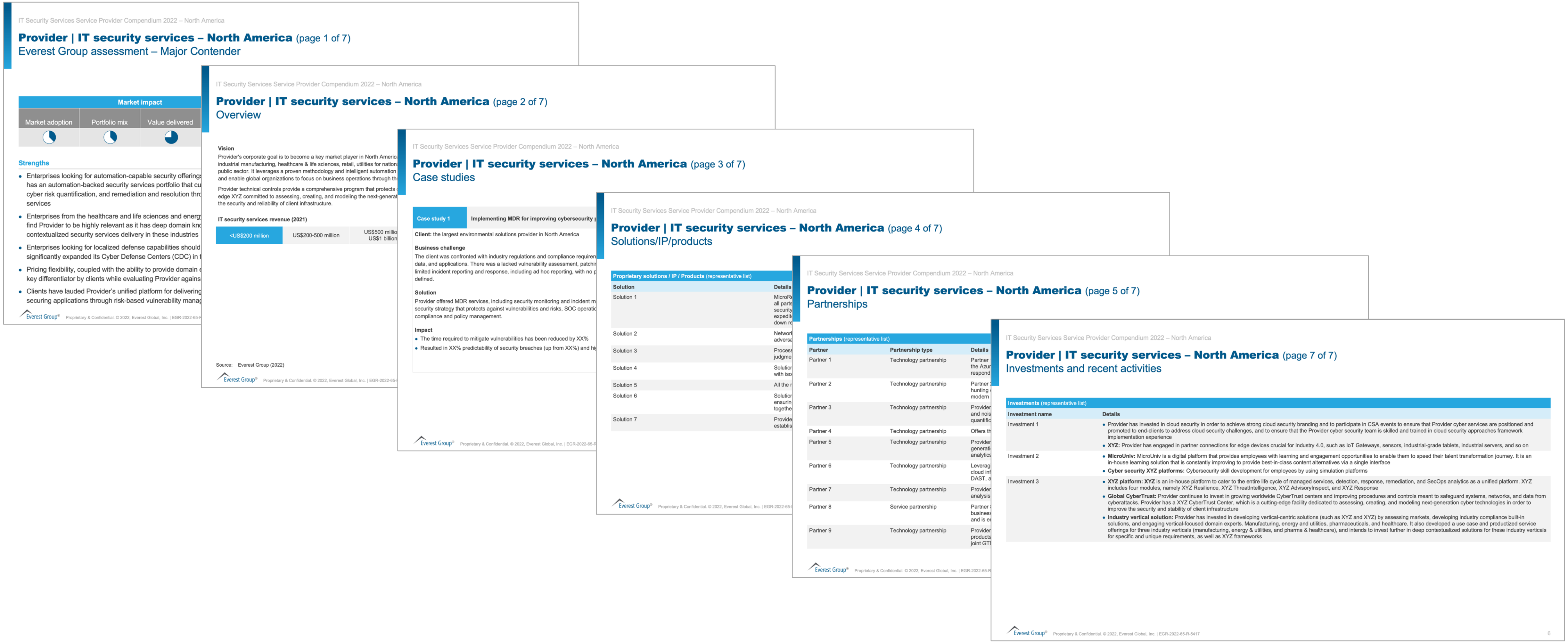
Scope of this report

Geography
North America

Providers
27

Services
IT Security Services

The IT security services – North America report has over 27 provider profiles/buyer case studies/architecture of the survey questionnaire, etc.



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	August 2022
IT Security Services Provider Compendium 2022 – North America	**September 2022**
IT Security Services Provider Compendium 2022 - Europe	Q4 2022
Data Security and Privacy	Q4 2022
Network Security and Security at the Edge	Q4 2022
Managed Detection and Response (MDR) Services PEAK Matrix® assessment	Q4 2022
Managed Detection and Response (MDR) Services Provider Compendium	Q1 2023
Managed Detection and Response (MDR) State of the Market	Q1 2023
IT Security Services State of the Market	Q1 2023

Note: Click to see a list of all of our published Cybersecurity reports

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