

# IT Security Services Provider Compendium 2022 – Europe

September 2022: Complimentary Abstract / Table of Contents



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- ▶ Application Services
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- ▶ 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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Locations: costs, skills,  
sustainability, portfolios

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# 01

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## Introduction and overview

- Research methodology
- Key information on the report
- Background of the research
- Focus of the research

# 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 the below key sources of information

- Proprietary database of IT services contracts of major IT providers with cybersecurity 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 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

- Service 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

1 Assessments for Capgemini, Deloitte, EY, IBM, KPMG, Orange Cyberdefense, PwC, and T-Systems is 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

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

### Providers assessed<sup>1, 2</sup>



## Introduction

The demand for IT security services in Europe is growing in terms of technological capabilities and localized presence of cybersecurity talent. Enterprises are grappling with cybersecurity challenges arising from the new-age security threats. Coupled with the rising trend of tying executive evaluation with cyber risk management, cybersecurity has started to become a boardroom mandate rather than just being a CISO-led effort. European enterprises are looking for service providers that can offer geographically nuanced security services, especially in areas such as data security & privacy, verticalized SOCs, converged IT/OT security services, and regulatory assessment services, to make sure that enterprises are not just adhering to ever evolving EU regulations but also the localized data privacy laws.

IT security service providers too have started to tap into these demand themes and are building capabilities to deliver the geographically contextualized services. Additionally, there is a strong push from service providers to proliferate their cybersecurity consulting capabilities in an effort to be seen as a holistic security partner that can deliver end-to-end security services.

In this research, we present an assessment and detailed profiles of 28 IT service providers for the IT security capabilities in Europe region featured on the [IT Security Services PEAK Matrix® Assessment 2022 – Europe](#). The assessment is based on Everest Group’s annual RFI process for 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 28 leading IT security service providers featured on the IT Security Services PEAK Matrix – Europe:**

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

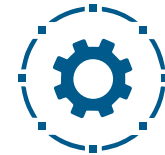
### Scope of this report



**Geography**  
Europe



**Providers**  
28



**Services**  
IT Security Services



# The IT security service - Europe report has over 28 provider profiles/buyer case studies/architecture of the survey questionnaire, etc.

IT Security Services Provider Compendium 2022 – Europe

## Provider | IT security services – Europe (page 1 of 6)

### Everest Group assessment

Market impact

Market adoption	Portfolio mix	V

### Strengths

- Enterprises looking for a service provider IT security services, can consider Provider because that provides a plug-and-play approach, unique capabilities
- Clients have appreciated Provider for its expertise in niche and advanced technology vendors
- Enterprises searching for a service provider IT security services, Provider to be a good fit because of its structure in DACH region
- Some clients have highlighted that Provider IT and OT SOC, underpinned by strong do

Source: Everest Group (2022)

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IT Security Services Provider Compendium 2022 – Europe

## Provider | IT security services – Europe (page 2 of 6)

### Overview

**Vision**  
 Provider aims to provide a comprehensive security strategy, operations and high productivity. Its operations service platform to assist in mapping, detecting, and mitigating infrastructure. It leverages the workflow and automation to prioritize incidents, it helps customers to avoid service. It also offers a security portfolio from a single source, services.

**IT security services revenue (2021)**

<US\$200 million	US\$200-500 million
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IT Security Services Provider Compendium 2022 – Europe

## Provider | IT security services – Europe (page 3 of 6)

### Case studies

**Case study 1** Implemented IT security as a service

**Client:** XYZ

**Business challenge**  
 The client wanted to enhance the IT security of its systems and infrastructure and initiated emergency response process architecture to identify cyber attacks on the business.

**Solution**  
 Provider implemented SOC and SIEM platforms to fortify infrastructure and initiated emergency response process architecture to identify cyber attacks on the business.

**Impact**

- Enhanced quality and enabled specificity of the analysis
- Achieved cost savings by utilizing SOC services as a managed service

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IT Security Services Provider Compendium 2022 – Europe

## Provider | IT security services – Europe (page 4 of 6)

### Solutions/IP/products

**Proprietary solutions/IP/products (representative list)**

Solution name	Details
Solution 1	<ul style="list-style-type: none"> <li>Enable fast response</li> <li>Protect the data</li> </ul>
Solution 2	Facilitate in cloud migration
Solution 3	Mitigate DDoS attacks
Solution 4	A platform that provides managed security services
Solution 5	Provides managed security services
Solution 6	An assessment tool
Solution 7	An IAM solution
Solution 8	On-demand cloud security
Solution 9	A data protection solution

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IT Security Services Provider Compendium 2022 – Europe

## Provider | IT security services – Europe (page 5 of 6)

### Partnerships

**Partnerships (representative list)**

Partner name	Type of partnership
Partner 1	Service partnership
Partner 2	Service partnership
Partner 3	Service partnership
Partner 4	Technology partnership
Partner 5	Service partnership
Partner 6	Technology partnership
Partner 7	Technology partnership
Partner 8	Technology partnership

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IT Security Services Provider Compendium 2022 – Europe

## Provider | IT security services – Europe (page 6 of 6)

### Investments and recent activities

**Investments (representative list)**

Investment name	Details
Others	<ul style="list-style-type: none"> <li>It extended its partnership with XYZ to jointly innovate on end-to-end solutions for customers in key industries, including the public sector, healthcare, automotive industry, and public transport</li> <li>Provider and XYZ recently partnered to offer a fully integrated set of campus network solutions to deliver an integrated end-to-end solution to directly meet the site connectivity needs of enterprise customers through high-quality and seamless service</li> <li>Provider opened new headquarters in XYZ, India, to spur digital transformation for customers globally</li> </ul>

Source: Everest Group (2022)

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# 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
<b>IT Security Services Provider Compendium 2022 – Europe</b>	<b>September 2022</b>
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



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