

A collage of several skyscrapers with glass facades, viewed from a low angle looking up. The buildings are arranged in a staggered, overlapping pattern, creating a sense of depth and modern architecture. The colors range from cool blues and greys to warmer yellows and oranges.

**\*ISG** Provider Lens™

2020

Cyber Security -  
Solutions & Services

imagine your future®

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# Definition

Within the scope of digitalization and the (industrial) internet of things (IoT), business processes are increasingly shifting to IT. With the growing need to protect IT and communication systems in companies, IT security has transitioned into business security.

Data and IT infrastructures are constantly exposed to criminal threats. Some threats are a result of carelessness operations. In addition to the need for self-protection, laws and regulations such as the General Data Protection Regulation (GDPR) in Europe force businesses to implement stronger safeguard measures to counter cyberattacks.

ICT security is also an important practice. However, IT executives often struggle to justify security investments to business stakeholders, particularly the CFO. Unlike other IT projects, it is not always possible to measure and

demonstrate the return on investments as well as quantify threat-related risks. Therefore, security measures are often at a low level and are not sufficient to address sophisticated threats. On the other hand, the lack of suitable technology does not always result in vulnerabilities; many security incidents such as Trojan and phishing attacks are caused due to the carelessness of users. Therefore, consulting and user trainings are continuing to play a key role, together with up-to-date ICT equipment.

The ISG Provider Lens™ Cyber Security - Solutions & Services 2020 study aims to support ICT decision makers in making the best use of their tight security budgets.

The ISG Provider Lens™ study offers IT decision makers:

- Transparency over the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by market segments
- Focus on local markets

This study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage the information from ISG Provider Lens™ reports while evaluating their current vendor relationships and potential new engagements.

# Quadrant Research

As part of the ISG Provider Lens™ quadrant study, this report includes five quadrants on cyber security as illustrated below.

Simplified Illustration



Source: ISG 2020

## Identity & Access Management

Identity and access management (IAM) products are used to collect, record and administrate user identities and related access rights. They ensure that access rights are granted based on defined policies. To handle existing and new application requirements, security providers are increasingly challenged to embed mechanisms, frameworks and automation (for e.g., risk analyses) into their management suites to provide the real-time user and attack profiling functionality. Additional requirements are related to social media and mobile users to address clients' security needs that go beyond traditional web and context-related rights management. This quadrant also includes cloud services by product providers.

Eligibility criteria:

- Relevance (revenue, number of customers) as an IAM product provider in the respective country
- IAM offering to be based on proprietary software and not on third-party software

## Data Leakage/Loss Prevention (DLP), Data Security

Data leakage/loss prevention (DLP) products can identify and monitor sensitive data, provide access for only authorized users, and prevent data leakage. They are gaining considerable importance as it has become more difficult for companies to control data movements and transfers. The number of devices, including mobile, that are used to store data is increasing in companies. These are mostly equipped with an internet connection and can send and receive data without passing it through a central internet gateway. The devices are supplied with a multitude of interfaces, such as USB ports, Bluetooth, WLAN and NFC, which enable data sharing. This quadrant also includes DLP cloud services by product providers.

Eligibility criteria:

- Relevance (revenue, number of customers) as a DLP product provider in the respective country
- DLP offering to be based on proprietary software and not on third-party software

## Managed Security Services

Managed security services comprise the operations and management of IT security infrastructures for one or several customers by a security operations center (SOC). Typical services include security monitoring, behavior analysis, unauthorized access detection, advisory on prevention measures, penetration testing, firewall operations, anti-virus operations, IAM operation services, DLP operations, and other operating services to provide ongoing, real-time protection without compromising business performance. This quadrant examines service providers that are not exclusively focused on proprietary products but can manage and operate best-of-breed security tools. They can handle the entire security incident lifecycle, starting from identification to resolution.

### Eligibility criteria:

- Ability to provide security services such as detection and prevention, security information and event management (SIEM), security advisor and auditing support, remotely or at the client site
- Possess accreditations from vendors of security tools
- SOCs ideally to be owned and managed by the provider and not predominantly by partners
- Maintain certified staff, for e.g., in CISSP, CISM, GIAC, etc.

## Technical Security Services

Technical security services cover services such as integration, maintenance and support for IT security solutions. This quadrant examines service providers that do not have an exclusive focus on their respective proprietary products and can implement and integrate vendor solutions.

### Eligibility criteria:

- Demonstrate experience in implementing security solutions for companies in the respective country
- Authorized by vendors to distribute and support security solutions
- Certified experts to support its security technologies
- Ability to participate (desirable, not mandatory) in local security associations and certification agencies

## Strategic Security Services

Strategic security services primarily cover consulting for IT security solutions. This quadrant examines service providers that do not have an exclusive focus on proprietary products or solutions.

### Eligibility criteria:

- Demonstrate experience in IT security consulting regarding security solutions for companies in the respective country
- No exclusive focus on proprietary products or solutions

# Quadrants by region

As part of the ISG Provider Lens™ Quadrant Study, we are introducing the following five quadrants (market) research on Cyber Security - Solutions & Services 2020 by region:

Quadrants	U.S.	U.K.	Germany	Switzerland	France	Brazil	Australia
Identity & Access Management	√	√	√	√	√	√	√
Data Leakage/Loss Prevention (DLP), Data Security	√	√	√	√	√	√	√
Managed Security Services	√	√	√	√	√	√	√
Technical Security Services	√	√	√	√	√	√	√
Strategic Security Services	√	√	√	√	√	√	√

\*CPQ = Candidate Provider Qualification

**Note:** We have highlighted some regions that do not have a quadrant report. The data for these regions is being collected for the Candidate Provider Qualification program.

**Note regarding data center & cloud security:** Service providers regarding data center & cloud security will be examined in this study.

**Products** (on-premises software / software as a service) regarding data center & cloud security will be examined in our Provider Lens™ Study regarding private / hybrid cloud and data center solutions. Respective software producers and SaaS providers will be invited to participate in the survey for that study.

# Schedule

The research phase falls in the period between **January** and **April 2020** during which survey, evaluation, analysis, and validation will take place. The results will be presented to the media in **May 2020**.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Launch	February 27, 2020	
Survey Phase	February 27, 2020	March 16, 2020
Sneak preview	June 20, 2020	
Press release	July-Aug 2020	

Please refer to the link below to view/download the Provider Lens™ 2020 research agenda:

<https://isg-one.com/docs/default-source/default-document-library/ipl-annual-plan-2020.pdf>.

## Research production disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



# Partial list of invited companies for the survey

**Are you in the list or do you see your company as relevant provider that is missing in the list?** Then feel free to contact us to ensure your active participation in the research phase.

Absolute Software	Brennan IT	CXO Security
Accenture	BT	CyberArk
Akamai	CA	CyberCX
Alphawest	Capgemini	Cyberstash
Amplify Intelligence	Cashel Group	Data#3
artchTIS	CDM	Datacom
Aryon	Centrify	DELL / RSA
ASG	CenturyLink	Deloitte
ASG Group	CGI	Detexian
Atos	Check Point	DriveLock
Avante IT	Cisco	DXC Technology
AVG	Citrix	Endace
Axians	Clearswift	Enosys
BAE Systems	Cloudflare	EnterpriseAV
BankVault	CM Technology Group	eSecure
Bechtle	Cognizant	EY
Beta Systems	Content Security	Fireeye
BeyondTrust	Coredelta	Forcepoint
Blackberry	CoreSec	ForgeRock
BLUE CONNECTIONS PTY LTD	Counterparts Technology	Fortifyedge

Fortinet	KPMG	Nuix
Fujitsu	Kroll	Okta
Gridware	Leidos	Optus
HCL	Logicalis	Oracle
Hivint	Lookout	Orange
Huntsman	LTI	Palo Alto Networks
IBM	Macquarie Government	Parafire
iispartners	Macquarie Telecom	Penten
Imperva	Matrix42	Ping Identity
Independent Data Solutions	McAfee	PixelIT
Infosys	Micro Focus	Proofpoint
Insentra	Microsoft	Protiviti
Intechnology	MobileIron	Pure Security
Interactive	NDZ	PwC
Iron Bastion	NEC	QuintessenceLabs
IXUP	Netpoleon	Randtronics
iZOOlogic	Netskope	Red Piranha
Juniper	Nextgen	RedShield
Kasada	NEXTGEN DISTRIBUTION PTY LTD	SAP
Kaspersky	NTT	Securestack

Secureworks	Tanium	Varonis
Senetas	TCS	Vault
Sentaris	Tech Mahindra	Vectra
Shearwater	Telstra	Veritas
Skybox	Tenable	Verizon
Slipstream	Tesserent	Vintek
Software AG	Thales	Vocus
SoftwareONE	The Missing Link	Vodafone
Sophos	Thycotic	WatchGuard
Southern Cross Protection	TPG	Wavelink Communications
Splunk	Trend Micro	WhiteHawk
Stickman	Trusted Security Services	Wipro
Symantec	Trustwave	Zscaler
Synnex	Unisys	

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Do you need any further information?

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