IDC MarketScape: Worldwide Cybersecurity Consulting Services 2024 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES AVANADE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Cybersecurity Consulting Services Vendor Assessment

Source: IDC, 2024

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Cybersecurity Consulting Services 2024 Vendor Assessment (Doc # US50463223). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

As a growing number of organizations view cybersecurity as a strategic business enabler, along with a surge of regulatory requirements across the world, the quest for quality cybersecurity consultants and trusted cybersecurity advisors hits an all-time high.

In this IDC MarketScape study, IDC assesses the following cybersecurity consulting offerings closely, while most of the featured vendors in this study do have a broader portfolio that goes beyond cybersecurity consulting services:

- Cybersecurity strategy planning and program transformation services
- Security architecture assessment and design services
- Cyber-resilience consulting services

Depending on the requirements, cybersecurity consulting services can be consumed in a discrete, bespoke fashion, but very often services are structured as a component of or integrated into a larger IT or business transformation initiative.

IDC conducted a global survey with 901 organizations to understand the buying trends of cybersecurity consulting services. The survey gathered direct tech buyer feedback for their respective cybersecurity consulting services providers across the world. Most of these firms are featured in *IDC MarketScape: Worldwide Systems Integrators/Consultancies for Cybersecurity Consulting Services 2024 Vendor Assessment* (IDC #US50463423, January 2024), and the remaining ones are studied in this IDC MarketScape.

IDC finds most of the participating firms have solid technical capabilities and strong cybersecurity skills. Among all the evaluation criteria, "skills and experiences of key personnel engaged in the project" showed positive remarks from the 901 surveyed organizations that utilize the cybersecurity consulting capabilities of the studied firms.

The very nature of cybersecurity consulting services relies heavily on the expertise of consultants. Cybersecurity consultants should have in-depth knowledge and experiences of one or multiple security domains, for example network security, security operations, incident response, regulatory compliance, and operational technology (OT) security, to support enterprises' needs. Industry-specific knowledge will be a bonus and highly appreciated by tech buyers.

Many of the firms were showing positive output in regard to delivery and people-related criteria, for instance project governance, meeting data privacy and sovereignty requirements, and engaged cybersecurity professionals being very responsive and professional. In contrast, cybersecurity consulting services providers should improve on the innovation aspects, including the proprietary intellectual property (IP), tools, and frameworks used in the engagement and effectiveness of using emerging technologies like AI and generative AI (GenAI) in the delivery and client engagement.

What is more, a good number of security services vendors package their cybersecurity offerings in a highly flexible way. There is a rising trend to package professional security services into a managed-, subscription-, or retainer-based model, such as expertise on demand (EOD) or cyber as a service (CaaS). These models are particularly attractive to midmarket.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To be included in this IDC MarketScape for cybersecurity consulting services, security services vendors must be able to provide services in the categories of cybersecurity strategy planning, transformation, security architecture assessment and design, and cyber-resilience consulting services. Further:

- A security services vendor must operate with a multinational footprint.
- A security services vendor must have a total revenue of cybersecurity consulting services that exceeds $25 million in 2023.

ADVICE FOR TECHNOLOGY BUYERS

In the highly competitive cybersecurity services market, buyers serve their organizations well by expressing assertive expectations and conducting thorough evaluation. Guiding buyers' evaluation, IDC offers the following advice:

- **Multidisciplinary model:** Evaluate vendor's multidisciplinary model and ensure the ability of the vendor to demonstrate an understanding of issues faced by stakeholders including those from outside the security functions such as risk, compliance, operations, IT, networks, finance, and engineering. On this topic, instead of considering an IT tabletop exercise, it might be more useful to have an entire operational tabletop exercise.

- **Addition of training hours:** For a transformation type of project, mandate a certain number of training hours or some cybersecurity awareness sessions in the scope to enhance the overall awareness to the relevant threats, typical cyberattack techniques. Security breaches often tie back to user actions. Fostering a security-aware culture within the organization is as important as strong security controls. Some of the evaluated cybersecurity services vendors have explicit cybersecurity training or learning and development offerings as part of their portfolio.

- **Innovation:** Innovation demonstrated throughout the engagement is a critical factor to differentiate cybersecurity consulting services vendors. While there is considerable hype around AI, examine the prospect cybersecurity consulting vendors' own way of adopting AI and GenAI, especially how do they ensure security and sovereignty issues of AI. Key questions you must ask include:

  - How do you monitor and audit AI systems?

  - What measures do you take to ensure responsible AI practices, including fairness, transparency, and accountability in your algorithms?

  - How are you protecting against authorized data entry into an AI model?

  - How do you plan to bring continuous improvement?

- **Communication:** Consider a vendor's expertise in communicating at the C-suite and board levels. In a cybersecurity consulting project itself, communication and stakeholder management are critical factors of delivering results successfully and on time. In this study, we have assessed vendors' capabilities to support boardroom communication. A handful of

vendors do have the capability to articulate risk in the boardroom and effectively connect technical risks to the business challenges without so much technical jargon used.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Avanade

Avanade is positioned in the Leaders category in this 2024 IDC MarketScape for worldwide cybersecurity consulting services.

Avanade, a global professional services company with 60,000 employees, provides IT consulting and services focused on the Microsoft platform and integration of third-party solutions. Formed as a joint venture between Microsoft and Accenture more than 20 years ago, the three companies jointly develop cloud-based offerings.

Avanade's vision is to advance the world through the power of people and Microsoft. It helps clients build resilience against cyberthreats by providing advisory, consulting, and managed security services. The company has 1,700 cybersecurity professionals, including 800 dedicated to cybersecurity consulting and 115 subject matter experts focused on strategy, architecture, design, and resilience consulting.

Avanade's cybersecurity consulting services are tailored to clients' digital transformation maturity level and objectives. The main practice areas are:

- **Security advisory:** Development of security strategies
- **Identity and access management (IAM):** Enterprise and privileged access, modernizing capabilities, and automating provisioning
- **Secure cloud and networks:** Focus on securing clients' digital infrastructures and embedding security throughout the life cycle
- **Data and AI platform protection:** Security of endpoints, applications, SaaS platforms, data and AI platforms, and more
- **Intelligent cyberdefense:** Testing of defenses, understanding emerging threats, and responding to threats

Security and resilience assessment frameworks are aligned to industry standards to help clients align their strategies and maturity models to regulatory frameworks. Proprietary IP is used in numerous assessments. Cyber-resilience journey maps are tailored to clients' industries and offer prescriptive guidance.

Security assets and accelerators include a MITRE ATT&CK alignment tool, the Avanade Cloud Access Manager for business-to-business (B2B) and B2C environments, the Azure Policy Library for Policy as Code for Secure Cloud Foundation, auto-remediation suggestions for vulnerabilities identified by application security tools, and test automation frameworks. Delivery assets include automation accelerators, repeatable documentation, configuration as code, and an MXDR content library.

Avanade's ISO 27001-compliant Client Data Protection (CDP) program provides engagement teams with a standardized approach to managing risk through a set of management processes, controls, and

metrics. The CDP program aims to protect the reputations and financial performance of Avanade and its clients by maintaining compliance and privacy during engagements.

Avanade's consultant retention initiatives include career advisors assigned to every employee; a Listen, Learn, and Improve survey; flexible working hours and locations; unlimited training and upskilling; recognitions and awards; and inclusion and diversity networks.

Avanade leverages partner solutions to augment and extend security services across the Microsoft ecosystem depending on the client's requirements. Key security partners including Zscaler, Quest, One Identity, Tanium, and Accenture provide delivery services to augment Avanade's teams. This approach supports global operations and local delivery.

Strengths

- Avanade works symbiotically with Accenture. Avanade's solution network and delivery capabilities can be extended by leveraging Accenture's team and vice versa. They leverage each other's cybersecurity capabilities. The clear focus of Avanade allows the firm to participate in private preview and early access programs with Microsoft, including a current Security Copilot initiative that uses generative AI.
- To identify new consulting services, Avanade relies on several sources that include Voice of Customer surveys, quarterly Avanade leader meetings, the Avanade Emerging Tech and Ventures incubation group, and customer intent data.
- A dedicated team of client experience experts oversees the client experience framework and numerous initiatives.
- Avanade clients showed positive feedback for the consultants' experience, technical expertise, and knowledge of Microsoft products, as well as for the responsiveness to customer feedback and the ability to implement globally.
- IDC's *Worldwide Cybersecurity Consulting Services Survey* participants give Avanade positive remarks for delivering work that achieves operational objectives and technology objectives, effective use of machine learning, overall delivery quality, and flexible pricing models.

Challenges

- The mission and focus of Avanade – to unlock the value of Microsoft solutions – is undoubted. It is useful to market and showcase Avanade's expertise across the ecosystem of Microsoft and non-Microsoft products. The same IDC's *Worldwide Cybersecurity Consulting Services Survey* also indicates room for improvement like thought leadership and effective use of the assets in the engagement.
- According to clients, Avanade can improve its cost-effectiveness and global services consistency and develop more sophisticated cybersecurity concepts.

Consider Avanade When

Enterprises that adopt a Microsoft-centric security strategy should consider Avanade because it has a sharp focus on and deep knowledge around Microsoft solutions. In addition, midsize and large enterprises with 2,500+ employees should consider Avanade when priorities include building cyber-resilience, securing people, and optimizing cost/service based on the Microsoft solution ecosystem. Clients span the low-to-high cybersecurity maturity curve.

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC defines cybersecurity consulting services as a range of professional services activities that help organizations plan, design, assess, or transform across their cybersecurity practice. In the scope of this particular IDC MarketScape study, the cybersecurity consulting services include strategy planning and program transformation, architecture assessment and design services, and cyber-resilience consulting. Examples of these services include:

- Security road map development
- Security strategy advisory
- Security operator center (SOC) design and build
- Security sourcing strategy
- Data security and sovereignty advisory
- Identity access management design and transformation
- Integrated threat intelligence design and consult
- Cybersecurity transformation
- Cyber-recovery consulting

- Cyber-supply chain resilience planning
- Architecture assessment services across networks, endpoints, edge, cloud, IoT, OT, and so forth

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Systems Integrators/Consultancies for Cybersecurity Consulting Services 2024 Vendor Assessment* (IDC #US50463423, January 2024)
- *What Are the Top Factors Deciding the Selection of Cybersecurity Consulting Services Providers?* (IDC #US51361823, November 2023)
- *Market Analysis Perspective: Worldwide Security Services, 2023 and Beyond* (IDC #US51228723, September 2023)
- *Worldwide and U.S. Comprehensive Security Services Forecast, 2023-2027* (IDC #US50047523, June 2023)
- *IDC's Worldwide Security Services Taxonomy, 2023* (IDC #US50332523, March 2023)

Synopsis

This IDC study represents a vendor assessment of cybersecurity consulting services for enterprises through the IDC MarketScape model. It assesses 15 cybersecurity services vendors offering cybersecurity strategy advisory, architecture assessment and design, cyber-resilience consulting, and cybersecurity transformation services. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for cybersecurity consulting services. The document provides detailed vendor profiles, highlighting their strengths, challenges, and key offerings.

"The role of a trusted cybersecurity partner has increased given the rising importance of cybersecurity to an organization's overall resiliency and success," says Cathy Huang, research director, IDC's Worldwide Security Services. "This trend is manifested in the growing demand for security and risk assessment, security strategy, and program advisory that drives all kinds of vendors, be it telecom providers, managed security pure players, cybersecurity specialists, IT outsourcing providers, or value-added resellers, to put strategic focus to grow their own cybersecurity consulting capabilities."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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