FRAMINGHAM, Mass. September 15, 2020 – International Data Corporation (IDC) today published a new assessment of 17 companies that offer managed security services (MSS) across the globe. The IDC MarketScape report uses a comprehensive framework to assess these vendors relative to a set of criteria that explain both short-term and long-term success in the MSS market. The companies evaluated in this MarketScape report are: Accenture, Atos, AT&T Cybersecurity, BT, Capgemini, Deloitte, DXC Technology, Fujitsu, HCL Technologies, IBM, Infosys, NTT, Orange Cyberdefense, Secureworks, Trustwave, Verizon, and Wipro.

The managed security services market has been steadily evolving as organizations strive to raise their security maturity and lower their risk. In response, providers have shifted and expanded their offerings, technology, methods, and processes to assist organizations in defending and responding against modern attacks. This trend has been accelerated in 2020 by the COVID-19 pandemic, which pushed organizations to review the security functions they had in place and deploy those that were needed to support the new remote workforce.

"Organizations are struggling to acquire the security expertise to assist in managing and monitoring the constant flow of security threats and to fully implement and integrate the growing number of tools that their security teams have acquired. As a result, organizations are turning to MSS service providers to deliver the security expertise, spanning managed security and complementary services to assist in preparing, detecting, and responding against future attacks," said Martha Vazquez, senior research analyst, Security Services at IDC.
Faced with a shortage of security experts and the ongoing emergence of new threats, security service providers have invested in areas such as threat intelligence, machine learning (ML)/artificial intelligence (AI), automation, and analytics. These investments have provided the scalability for organizations to do things faster and with fewer errors than humans.

"Service providers are racing to offer in-depth advanced detection and response capabilities to compete in the ever-evolving cybersecurity market. The various providers are all partnering and developing their own proprietary technology to stay ahead of the curve," Vazquez added. "Since the market has evolved, the role of traditional MSS service providers has matured and expanded. The expansion of MSS, which IDC has labeled MSS 3.0, now entails managed detection and response. It will be interesting to see how these competitors continue to stay ahead of the curve and display continued differentiation within the security landscape."

Looking forward, IDC believes the following will be key market drivers and will provide opportunities for MSS providers to differentiate their offerings:

- The use of advanced and emerging technologies that will provide greater visibility against sophisticated threats and provide enhanced use of automated processes
• The ability to deliver higher level of orchestration, automation, and openness in the core platform
• Global delivery and support of security services such as security operations centers (SOCs) distributed evenly across various geographies and with follow-the-sun (FTS), 24 x 7 capabilities
• Cloud monitoring, visibility, and management capabilities that seamlessly enable multiple cloud implementations

The report, IDC MarketScape: Worldwide Managed Security Services 2020 (IDC #US46235320), provides an assessment of 17 providers offering managed security services on a worldwide scale. The assessment reviews both quantitative and qualitative characteristics that define current market demands and expected buyer needs for MSS.

About IDC MarketScape

The IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of IT, telecommunications, or industry-specific suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor’s position within a given market. IDC MarketScape provides a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of IT, telecommunications,
or industry-specific vendors can be meaningfully compared. The framework also provides technology buyers with a transparent foundation to allow companies to independently compare the strengths and weaknesses of current and prospective vendors.

For more information about IDC MarketScape, please contact Karen Moser at kmoser@idc.com.

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 1,100 analysts worldwide, IDC offers global, regional, and local expertise on technology 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), the world's leading media, data and marketing services company. To learn more about IDC, please visit www.idc.com. Follow IDC on Twitter at @IDC and LinkedIn. Subscribe to the IDC Blog for

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