

# IDC MarketScape: Worldwide Cybersecurity Consulting Services 2024 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES CDW

## 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

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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

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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 MARKETSCOPE VENDOR INCLUSION CRITERIA

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To be included in this IDC MarketScope 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

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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 unauthorized 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 PROFILE

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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.

### CDW

CDW is positioned in the Major Players category in this 2024 IDC MarketScape for worldwide cybersecurity consulting services.

CDW, a United States-based provider of technology products and services, employs 14,900 people and affiliates with more than 2,000 OEMs and vendors. Of the company's 548 cybersecurity professionals, 359 are dedicated to consulting services. Consultants are located in most U.S. states; in the Toronto, Canada area; in the London, United Kingdom area; and in India. Consultants serve clients globally.

CDW has been acquiring companies and developing IP to help round out its portfolio of advisory and professional services, managed security services, and compliance support. In 2021, for example, CDW acquired Focal Point Data Risk, a key United States-based cybersecurity services firm, and Sirius Computer Solutions, a U.S. solutions integrator with a sizeable security practice. In 2023, CDW acquired Locus Recruiting, a staffing business with experience in identity and operational technology.

The predominant consulting bias is a focus on risk levels, risk tolerance, and risk mitigation options for clients that are digitally transforming. The Global Security Services Office (GSSO) engages clients to help them align technology strategy and investments with risk management goals. The GSSO also shares insights with clients via topical briefings, workshops, and peer-to-peer guidance at no cost or low cost.

The top consulting services categories span identity and access management, security program consulting, and penetration testing. Other cyberdrill offerings are red teams and purple teams. In addition, CDW's workshops, assessments, and program development services are organized into:

- Program strategy and operations
- Cyber-resilience and compliance
- Identity access management
- Cloud and application security
- Secure infrastructure
- Threat and vulnerability
- Skills and training

IAM is a core service that CDW offers. It encompasses assessments, implementation, and platform management. IAM cybersecurity consulting services is the largest revenue contributor among all the CDW cybersecurity consulting services. Key IAM partners include Okta, Microsoft, SailPoint, Ping Identity, Splunk, and CyberArk.

The path for clients that want to move from consulting services to managed services includes assessments and recommendations, implementation and training, incident response planning,

managed services introductions, and continuous improvement and cost efficiency. A workforce development team offers free assessments of client teams, a road map for improvement, and training of the cybersecurity personnel.

A Database Security Assessment assesses database risk, and a Data Protection Modernization Assessment evaluates the entire data protection ecosystem with an eye to recoverability. A proprietary Data Protection Scorecard, together with stakeholder interviews and analytics tools, provides a comparison of the existing environment to the modernized environment.

## Strengths

- CDW clients highlight strengths for the company as "very knowledgeable, personable, and being flexible and available to our needs." In addition, the breadth of expertise, creativity, and teamwork have also been highlighted as key strengths.
- CDW focuses on client outcomes through an ICARE model (innovation, cost, agility, risk, and experience). To transfer knowledge and/or train clients, the company uses standardized approaches and presentations of findings to executives, boards, and other key stakeholders. A digital velocity team supports clients with application modernization, cloud migration, and security.
- IDC's *Worldwide Cybersecurity Consulting Services Survey* respondents give positive feedbacks to CDW in several areas. These include delivery of work that achieves technology, operational, and business objectives; overall innovation and technical capabilities; and value-added services.
- In addition to custom-scoped consulting engagements, CDW offers more than 50 standard assessments including IT risk, cybersecurity maturity, vulnerability, DDoS resiliency, identity exposure, and PCI DSS. In recent years, CDW has expanded certain vulnerability assessments and IoT device assessments to include OT. One service, for example, evaluates a client's ability to prevent and/or react to a targeted, nondestructive physical intrusion.

## Challenges

- While all the acquisitions are additive to how CDW engages with clients, supports go-to-market speed, and adds value for clients, CDW should put more emphasis in communicating the integration, culture alignment, and staff retention to ensure its organic growth strategy works well for CDW. The overall market visibility in the cybersecurity space can be further improved.
- According to client feedback, CDW can improve in the overall delivery efficiency, key assets, tools, and frameworks used in the engagement and management of staff turnover during the project's lifetime.

## Consider CDW When

Enterprises of all sizes at any maturity level in North America and United Kingdom should consider CDW for assistance with investment rationalization, zero trust, cloud security, workforce shortages, and regulatory compliance. Transformation priorities may include data classification, identity and access management, and alignment of strategy, investments, and risk.

## APPENDIX

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### 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

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### 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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