



Managed Security and Threat Lifecycle Services: Leaders and Challengers in APJ 2018

SINGAPORE, July 3rd, 2018 - IDC has published two new reports *IDC MarketScape: Asia/Pacific Managed Security Services (MSS) 2018 Vendor Assessment* (IDC #AP42609818) and *IDC MarketScape: Asia/Pacific Threat Lifecycle Services 2018 Vendor Assessment* (IDC #AP43699718). The MSS report provides a detailed evaluation of 19 managed security services providers that address the evolving regulatory environment, and the complex security challenges brought by digital/business transformation and rapidly broadening threat landscape.

The IDC MarketScape on Managed Security Services focuses on the evaluation of managed security services providers' security offerings, including compliance management, security infrastructure management in hybrid environments, portfolio benefits, core platform's automation and orchestration capabilities, market execution, customer services. Altogether vendor responses to 29 separate evaluation criteria are evaluated. (i.e.15 criteria for capabilities and 14 criteria for Strategy).

The IDC MarketScape MSS assessment named (in alphabetical order) Accenture, BT, Deloitte, EY, IBM, NTT, Symantec, and Trustwave in the Leaders category of the managed security services market. While other vendors profiled in this IDC MarketScape analysis such as DXC, Fujitsu, HCL, Orange Business Services, Quann, Secureworks, Verizon, Tata Communications, TCS, Telstra, and Wipro were named in the Major Players category.

The emergence of the threat lifecycle services market is reflective of a major market shift in the overall security services market – from the traditional solution-focused, compliance-driven managed security services to threat-focused and intelligence-driven lifecycle security services. This year the Threat Lifecycle Services report provides detailed analysis of the capabilities of 17 providers which offer a range of threat lifecycle services that help organizations be more proactive in the preparation, detection and response to any incidents or threats and significantly enhance their cyber resilience level.

Using the proven IDC MarketScape model, IDC studied 17 organizations in 2017–2018 that offer threat lifecycle services in Asia/Pacific, although majority of the participating companies deliver services worldwide. The IDC MarketScape on Threat Lifecycle Services focuses on a set of professional security services, (including advisory, consulting and training services) such as

security assessment, cyber range, incident response, threat intelligence services, and forensics services.

The IDC MarketScape on Threat Lifecycle Services assessment (in alphabetical order) named Deloitte, EY, Fireeye, Symantec, Verizon, and Secureworks in the Leaders category, differentiating themselves with various expertise throughout the threat lifecycle. Meanwhile DXC, Fujitsu, HCL, Kaspersky, IBM, NTT, Quann, TCS, Trustwave, RSA, and Wipro were named in the Major Players category in this assessment.

Both reports provide pertinent guidance for technology buyers and highlight how each vendor is uniquely differentiated. Both studies leverage a comprehensive list of capabilities and strategy criteria that explain a vendor's success in each market. The evaluation is based on a multidimensional and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"Tech buyers should select providers that have the best characteristics to augment and optimize their security operations, and more importantly, transform their security programs to be more aligned with their business strategies. Breaches have become a daily occurrence and it is critical for security service providers to offer a lifecycle approach that include services to help organizations prepare, respond, remediate, and recover to a healthy state, and to minimize the negative impact of breach," says [Cathy Huang](#), Senior Research Manager, IDC Asia/Pacific Security Services.

For more information on these IDC MarketScape documents, please contact Cathy Huang chuang@idc.com. For media inquiries, contact Tessa Rago trago@idc.com or Alvin Afuang aafuang@idc.com.

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About IDC MarketScape

[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.

About IDC

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Figure 1



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