



The Forrester Wave™: Information Security Consulting Services, Q1 2013

by Ed Ferrara and Andrew Rose, February 1, 2013

KEY TAKEAWAYS

CISOs Need Help With Both Skills And Bandwidth

Today's business environment commonly restricts the funds available for security, and in a challenging recruitment market, this can mean that firms lack skilled resources. Consulting firms now offer a long list of technical capabilities to resource your program, and they add value with strategy, planning, governance, and risk management expertise.

Choose A Consultant That Complements Your Strengths

Use a consultant to complement your strengths, existing skills, and capabilities and not as a replacement for your own staff. Consulting firms should create advantage, allowing you to accomplish more. Staff expertise, size, location, as well as methodology and technology partners are important considerations when choosing a consulting partner.

Global Threats Increase Sense Of Urgency And Need For Help

Nation-state and organized crime threat actors increase the CISO's sense of urgency to implement new controls, but CISOs don't have all the skills and bandwidth needed to meet these challenges. Strategic partners must now provide the necessary expertise in governance, risk management, strategy, and security technology to meet this sense of urgency.

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Ernst & Young, Deloitte, IBM, Accenture, PwC, And KPMG Lead, With Wipro Following Close Behind

by [Ed Ferrara](#) and [Andrew Rose](#)
with [Chris McClean](#), [Nick Hayes](#), and Kelley Mak

WHY READ THIS REPORT

The information security consulting market is growing explosively because security and risk professionals often lack the skill and bandwidth to accomplish their increasingly difficult mission. To help security and risk pros deal with the onslaught of new risks and regulations, consulting firms offer high-quality security strategy, process, and technology skills. In Forrester's 42-criteria evaluation of the information security consulting services market, the Leaders, Ernst & Young (E&Y), Deloitte, IBM, Accenture, PwC, and KPMG, all demonstrated tenacious client focus, deep technical expertise, wide breadth of services, and substantial global reach. The Strong Performers, Wipro, HP, Verizon, and BT Global Services (BT), all pushed the Leaders, providing excellent security skills and boasting good-to-great client feedback. The Leaders and Strong Performers all have their respective strengths, and some weaknesses, but each has the ability to step in and step up to solve real security challenges for security and risk pros.

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Notes & Resources

Forrester conducted consulting services evaluations in Q3 2012 and interviewed 30 vendor and user companies, including Accenture, BT Global Services, Deloitte, Ernst & Young, HP, IBM, KPMG, PwC, Verizon, and Wipro.

Related Research Documents

[Determine The Business Value Of An Effective Security Program — Information Security Economics 101](#)

October 2, 2012

[Navigate The Future Of Compliance And Risk Management](#)

May 24, 2012

[Defend Your Business From The Mutating Threat Landscape](#)

November 1, 2011



CISOS NEED HELP WITH BOTH SKILLS AND BANDWIDTH

Today's information security managers struggle with competing priorities and a growing list of responsibilities; they face a constant stream of strategic and tactical problems. Historically, CISOs were reluctant to seek help from consulting firms. Reasons for this varied, from a lack of trust to concerns that consulting firm employees were no more skilled than the CISO's own employees.

However, this disinclination to seek outside help is fading quickly. The sheer number of increased threats and new regulations are overwhelming many security programs.¹ At the same time, skilled information security practitioners are difficult to find, so companies are having a tougher time staffing teams to meet these growing challenges.²

Consultants Help You Develop And Manage A Viable Security Strategy . . .

A fundamental shift is taking place in CISO responsibilities.³ The CISOs of the past were, in general, solely responsible for security technology, and they reported to the CIO. CISOs today find themselves answering risk, finance, and business questions and having direct influence with their company's board of directors. Information security now requires strategic thinking, requiring CISOs to prioritize security spending and resources to meet business objectives. In this new environment, CISOs need strong, competent, and trusted advisors to help them:

- **Align the business and information security.** Security has historically been an additional technical discipline within the IT organization. To demonstrate that they are a critical component of their company's success, security organizations must demonstrate that their efforts support the achievement of business objectives.⁴
- **Develop effective security budgets.** As the traditional perimeter dissolves, the CISO's jurisdiction quickly extends to the mobile workforce, virtualized environments, and third-party ecosystems; this makes it nearly impossible to secure all information assets at the same level. CISOs must prioritize their budgets and spend resources where they count.
- **Foster business unit participation and compliance.** All of the various security tools in the world can only do so much. To create an environment of security and demonstrate adherence to regulatory requirements requires widespread involvement from staff.
- **Evaluate and manage third-party relationships.** Security managers must ask themselves which security operations can be outsourced to create efficiencies and improve competency. They must also participate as much as possible in insuring that security is a part of the broader corporate third-party ecosystem.

- **Measure the value of security.** To make smart decisions about how they allocate resources and to demonstrate the value of investments made to improve information security, CISOs need sound metrics and measurement capabilities.⁵
- **Perform security benchmarking.** Along with all of these other decisions and challenges, heads of security are also compelled to ask whether their capabilities, staffing levels, budgets, and results compare favorably with those of their peers.

... And Help You Become A Master Tactician

It's not enough to develop a solid security strategy to support the business; the CISO demonstrates true business value when the security team flawlessly executes well-crafted plans to improve business performance and mitigate information security risk. This means CISOs need to carefully plan projects, orchestrate resources, track security investments, and manage stakeholder expectations while demonstrating quantifiable results. This is a lot of work and involves coordinating many moving pieces. Security consulting firms help the CISO:

- **Address new technology use models.** Smartphones, tablets, and mobile devices are changing the ways employees use technology. These trends, coupled with bring-your-own-device (BYOD) initiatives, will force the CISO to implement new, necessary security control processes and technology. In most cases, the CISO can no longer say no to these initiatives. The directive from senior leadership is “make it work.”⁶
- **Evaluate cloud providers.** The cloud represents a new step in outsourcing that further removes security control from the CISO. Security controls in cloud environments are not always transparent. Security controls may now be the responsibility of the cloud vendor, but the CISO is still accountable for the security and privacy of corporate data when it resides outside of the traditional corporate environment. Security managers need processes to gain assurance from cloud providers, which will give them confidence in their services and controls.⁷
- **Facilitate business transformation.** As businesses face an almost constant state of change, security must be a valuable player in efforts to meet new business objectives. They have to show their worth as partners during such changes. Budgets remain under pressure, and business transformation is about finding new efficiencies. Security and risk professionals need to join in these efforts.⁸
- **Implement secure business processes.** Rather than bolting security onto existing assets and processes, security teams must come to the table early with solutions for implementing new and innovating processes in a secure way. This requires tactical changes in the ways businesses conduct business, wiring security directly into the process without compromising efficiency.

- **Improve influence and reach.** Just like business counterparts and other stakeholders that have their own performance objectives and challenges, security managers must convince their colleagues that more security is good for them.⁹
- **Harness the power of social media safely.** Along with managing a number of other new and emerging consumer technologies breaking into the corporate market, security managers must find ways to utilize social media safely; blocking it is no longer a viable option.¹⁰
- **Virtualize the IT infrastructure.** Security must stay on top of constantly changing IT infrastructure, and this includes understanding how to develop and enforce effective controls for new virtualized IT environments.

CHOOSE A CONSULTANT THAT COMPLEMENTS YOUR STRENGTHS

The goal of using a consulting firm is to allow you to accomplish more. Choose a consultant that complements your strengths and existing skills and capabilities and not as a replacement for your own staff. The firms reviewed here will deliver exceptional results when used for the right projects. This should be the start of a trusted relationship rather than just a fling. One CISO of a large multinational financial services organization put it this way: “We have had an almost eight-year relationship . . . I look at them like they are almost my right arm.”¹¹

The firms assessed in this Forrester Wave differ in approach and focus on different service offerings. Some have excellent risk management practices, some have excellent systems integration and technology practices, and some have both. Staff expertise, company size, location, methodology, and technology partners all contribute to a firm’s ability to deliver. With this in mind, don’t be afraid to ask for résumés, interview the proposed staff for the project, and require existing client references.

INFORMATION SECURITY CONSULTING EVALUATION OVERVIEW

To assess the state of the information security market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top service providers in this area.

Our Criteria Target Technical Competencies, Delivery Capabilities, And Business Value

In creating the evaluation criteria for this review, we considered various sources of information, including past research, user need assessments, and expert interviews; we also closely reviewed the previous Forrester Wave. From this, we developed a comprehensive set of 42 evaluation criteria, which we grouped into three domains:

- **Current offering.** To assess service strength, we evaluated each offering using four sets of criteria: client feedback, delivery capability (which included geographic footprint and consultant experience levels), consulting service offerings, and technology partnerships.
- **Strategy.** We considered how each vendor planned to enhance its services portfolio to meet future demands from clients. Service providers were measured according to the investments they were making to support their strategy in terms of research and development, staff education and training, and the expansion of geographic coverage. We also considered the value proposition they could offer to clients.
- **Market presence.** To rate each vendor's market presence, we combined information about their customer base, growth rates, and revenues.

Vendors Have A Comprehensive Suite Of Services And Deep Security Expertise

Forrester included 10 vendors in this assessment: Accenture, BT Global Services, Deloitte, Ernst & Young, HP, IBM, KPMG, PwC, Verizon Business, and Wipro. Each of these vendors has (see Figure 1):

- **A wide suite of information security consulting services.** We looked for providers that offered a good depth of information security consulting across the 20 different services that we scrutinized.
- **Sizable revenues from consulting, advisory, and assessment.** Where disclosed, the total revenue for information security consulting, advisory, and assessment for each of the vendors is greater than \$75 million.
- **Sizable growth in their consulting, advisory, and assessment offerings.** Where disclosed, these organizations are reporting in excess of 15% year-on-year growth in revenue associated with their information security consulting, advisory, and assessment practices.
- **Large client bases.** Where disclosed, these providers state that they have information security clients numbering from 190 to as many as 14,000 globally.
- **A significant number of dedicated consulting, advisory, and assessment consultants.** All service providers evaluated for this Forrester Wave have more than 400 dedicated consulting, advisory, and assessment consultants.

- **A substantial interest from Forrester clients.** Forrester has seen a high degree of interest from our clients in each of these providers.

Figure 1 Selection Criteria For Evaluated Vendors

Vendor selection criteria
A wide suite of information security consulting services. These providers offered a good depth of information security consulting across the 20 different services that we scrutinized.
Sizable revenues from consulting, advisory, and assessment. Where disclosed, the total revenue for information security consulting, advisory, and assessment for each of the vendors is greater than \$75 million.
Sizable growth in their consulting, advisory, and assessment offerings. Where disclosed, these organizations are reporting in excess of 15% year-on-year growth in revenue associated with their information security consulting, advisory, and assessment practices.
Large client bases. Where disclosed, these providers state that they have information security clients numbering from 190 to as many as 14,000 globally.
A significant number of dedicated consulting, advisory, and assessment consultants. All service providers have more than 400 dedicated consulting, advisory, and assessment consultants.
A substantial interest from Forrester clients. Forrester has seen a high degree of interest from our clients in each of these providers.

Source: Forrester Research, Inc.

GLOBAL THREATS INCREASE SENSE OF URGENCY AND NEED FOR HELP

Forrester published our last Forrester Wave for security consultants in 2010. For company boards, CEOs, and CIOs, the threat actors that create the most concern are nation-states and organized crime. Well-publicized security breaches increase the sense of urgency. CISOs don't have all the skills or the bandwidth to meet this new sense of urgency. Questions such as "Do we have the right security strategy?" and "Are we protecting the correct things?" are now more important than ever.

Consulting firms reviewed in this Forrester Wave are in the middle of impressive expansion and training programs to offer new services and provide the necessary skills and bandwidth CISOs need to meet these new challenges. Firms are quickly maturing their security consulting offerings, building up staff resources, and expanding into the wider global marketplace. This evaluation uncovered a market in which (see Figure 2):

- **E&Y, Deloitte, IBM, Accenture, PwC, and KPMG are the Leaders.** This was a tough group to judge overall because they all demonstrate a laudable level of excellence. These firms scored the highest, earning scores of four and five across all the major evaluation categories in the Forrester Wave. E&Y has excellent client references. The firm's heavy investment in its security business is bringing strong results, and E&Y's strategy added greatly to the firm's score this year. Deloitte still has the largest practice globally, and like last year, the firm shows a passionate commitment to client success. Deloitte's client references were exceptional and similar to last year; Deloitte's ability to execute rated the highest of all the participants. IBM and Accenture received very positive feedback from their clients and had excellent delivery capability across their service lines globally. IBM's technology base is very sound, and Accenture has great systems integration capabilities. PwC has very strong global delivery capabilities, and the firm offers solid, comprehensive services with the ability to address almost all of the security and risk challenges that clients will face. KPMG has excellent customer retention and client references, although the firm's practice is not as large as are some of the firms in the Forrester Wave, and some service lines still need development.

- **Wipro, HP, Verizon, and BT Global Services are Strong Performers.** These firms demonstrate maturity and the ability to execute tactically on implementation projects. These firms were not as strong in strategy development or security and business alignment. They also did not display the same depth and breadth of their service offerings. Wipro has a large and very centralized staff. Wipro prefers to service global accounts from central locations with teams focused on North America, Europe, Australia, and the rest of world. HP's growth rate and size will enable it to continue to build both momentum and client base. HP's investment in security is substantial, and we expect that to pay dividends in 2013. Verizon has a very credible and growing security practice, with considerable strength in select service lines, especially network and application security. BT's European presence is strong, and the company is expanding globally. BT's service portfolio is not as broad as the other consulting firms in this Forrester Wave; however, BT maintains sharp focus on those offerings and delivers them with very high quality.

When interviewing the representatives and clients of these consultancies, it became clear to us that there are two different strategies in place. The more traditional consultancies (Deloitte, E&Y, KPMG, and PwC) focus on such elements as thought leadership, organizational transformation, risk management, and business value, while the other vendors (Accenture, BT, HP, IBM, Verizon, and Wipro) see consultancy as a steppingstone for engaging the client with their managed service offerings. This is not to denigrate or undermine the services they offer; however, it was apparent that selling managed services is always on their agenda.

Forrester's evaluation of the information security consulting market is only a starting point. We strongly encourage readers to view the detailed provider evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 2 Forrester Wave™: Information Security Consulting Services, Q1 '13



Source: Forrester Research, Inc.

Figure 2 Forrester Wave™: Information Security Consulting Services, Q1 '13 (Cont.)

	Forrester's Weighting	Accenture	BT Global Services	Deloitte	Ernst & Young	HP	IBM	KPMG	PwC	Verizon	Wipro
CURRENT OFFERING	50%	4.12	2.37	4.34	3.66	3.26	3.98	3.50	3.46	2.95	3.39
Client feedback	50%	4.00	2.50	4.50	4.10	3.40	3.80	3.80	3.20	2.50	2.80
Delivery capability	30%	5.00	2.20	4.20	2.80	3.00	4.60	3.40	3.80	3.00	4.20
Service offerings	15%	3.12	1.42	4.52	4.16	2.71	3.64	3.51	3.78	3.64	3.19
Technology partnerships	5%	3.00	5.00	3.00	3.00	5.00	3.00	1.00	3.00	5.00	5.00
STRATEGY	50%	3.80	3.08	4.12	4.90	2.92	4.30	3.72	3.96	3.08	3.10
Value proposition	60%	4.00	3.00	5.00	5.00	3.50	4.00	4.00	4.50	3.50	3.50
Future direction	40%	3.50	3.20	2.80	4.75	2.05	4.75	3.30	3.15	2.45	2.50
MARKET PRESENCE	0%	3.70	2.05	3.90	3.25	4.10	3.95	3.20	4.70	3.05	2.25
Client base and engagement	50%	4.00	2.50	3.50	3.50	4.50	5.00	4.00	4.50	3.50	2.50
Financials	50%	3.40	1.60	4.30	3.00	3.70	2.90	2.40	4.90	2.60	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders: Mature Service Offerings And Strong Delivery Capabilities Delight Clients

- **E&Y's strong service offering and exceptional strategy allow E&Y to take high honors.** The firm received very positive feedback from clients and has a high level of repeat business, in excess of 90%. More than 3,600 professionals deliver the company's broad range of services, with major presence in the US, EMEA, and Asia. Areas of strength for E&Y include BC/DR, regulatory compliance, DLP, and fraud investigation. The company's well-established processes ensured that E&Y performed very well in planning, delivery, and quality. Other notable positive factors include E&Y's deep commitment to innovation and thought leadership, its strong strategy for the future, and a global vision that seeks to sidestep internal competition for business and give the client a single global experience. Client references were very positive, with an E&Y client stating that E&Y has "always delivered what I ask," while another reported, "They plan well, and commit to what they can deliver with no surprises and a strong eye on quality control." Companies looking for a long-term partner with a solid suite of services and a great strategy for the future should look to E&Y.

- **Deloitte continues to be a Leader with exceptional client feedback.** Deloitte maintained its position in the Leaders category thanks to exceptional client feedback and comprehensive, sophisticated, and mature service offerings, with notable strengths in BC/DR and network strategy and design. With a clear focus on delivering business value to the client, Deloitte has managed to grow its customer base by roughly 8% in 2011 and 2012 to more than 4,985 clients globally. Client references pointed to the quality of the consultants, the firm's risk-led approach, and its vertical experience as areas of strength, while there was room for improvement in resource estimation and the management of intricate programs of work. Although it leverages its offshore capabilities to manage cost and process bulk workloads, Deloitte shines when tackling large-scale challenges at mature, complex organizations. Customers facing such issues and looking for a vendor that will marry deep technical capabilities with strong business processes should look to Deloitte.
- **IBM burst into the Leader category by demonstrating superb global delivery capabilities.** IBM came out as the most improved vendor in this Forrester Wave, substantially improving its scores as compared with other Leaders, thanks to outstanding global delivery capabilities supported by more than 6,000 consultants with significant levels of experience (an average of approximately 9.5 years). The purchase of Q1 Labs in late 2011 has added to IBM's technical capabilities and provided it with additional insight and expertise to feed into a growing consulting and solution delivery organization. IBM has an understandable focus on managed security services and is confident in its delivery capability that it chooses to share client risk, often in the form of fixed-price engagements. IBM has the largest client base of the participants in this Forrester Wave. IBM has serious focus on security and plans heavy investment to improve its consulting capability globally. Clients praised the flexibility, knowledge, and responsiveness of IBM's consultants while also noting the company's excellent documentation. Areas for improvement include price, back-office formality, and an overly heavy focus on technologies and processes rather than people. Organizations looking for a high-quality vendor that can do it all and manage it afterwards should consider IBM.
- **Accenture's experience and good value ensure client satisfaction and repeat business.** Accenture has excellent technical capabilities and seeks to pragmatically embed security into customers' business processes rather than just deliver technology solutions. Accenture's service offerings are on par with the other firms in the Forrester Wave. As an experienced global systems integrator, Accenture demonstrates strong security program and project management that inspires considerable repeat business. Accenture uses a center of excellence in India for much of the company's operational client work. Doing this allows Accenture to provide very competitive pricing that customers applauded. Accenture's practice focuses on complex and unusual security transformation projects; however, expect Accenture to propose managed security services as part of any solution. Client feedback cited time delays (sometimes caused by Accenture's own cumbersome methodologies) and a lack of empathy for client financials as areas for improvement. Companies looking for complex technology implementation or considering a managed security solution as part of the package should look to Accenture.

- **PwC maintains a leadership position through the scope and quality of service offerings.**

PwC has remained in the Leader category by maintaining a diverse and mature selection of quality service offerings. Although PwC's previously unsurpassed level of consultant experience has declined somewhat, PwC still employs and develops consultants who are both technically adept and able to engage with nontechnical stakeholders without supervision. With a back office in India, PwC provides high levels of service to its 6,500 clients and makes certain that it is maintaining a consistent level of quality for each. Client references highlighted PwC's strong commitment, flexibility, and timeliness, while they identified staying abreast of the latest technologies and threats and pricing as potential areas for improvement. Clients searching for a firm with great global coverage and solid delivery capabilities should consider PwC.

- **KPMG demonstrates personality and a strong focus on customer advancement.**

KPMG was one of two organizations in this evaluation for which personality and perspective made a significant impact. KPMG's razor-sharp focus on delivering competitive advantage, value to customers, and an appetite to take on the toughest consultancy tasks (often taking over from competitors), shone through in our interviews. KPMG continues to offer best-in-class services for strategy, design, and assessment of information risk governance as well as threat and vulnerability management. The company also demonstrates proven expertise and ability with large-scale, complex projects. Client references cited the expertise of the company's 1,600 security and risk professionals, their teamwork, and strategic thinking as areas of strength. Conversely, low levels of R&D and some patchy global coverage are areas for improvement. KPMG's focus on delivering competitive advantage to its clients and learning from client feedback makes the company an excellent partner for its clients. Organizations looking for strategic guidance to help solve a tough problem should consider KPMG.

Strong Performers: Experts In Their Areas, Bringing Very Different Offerings To Clients

- **Wipro's high level of productivity and refusal to miss targets offer significant value.** Wipro has built upon its IAM practice, expanding its security consulting services significantly. The firm has grown steadily to become a significant player in the security consulting market. Price is an important differentiator to Wipro's clients; however, the most notable customer feedback was about the company's ability to analyze and refine processes before ramping them up to deliver high levels of productivity with very low error rates. Wipro has 400 clients globally, and Forrester estimates Wipro's growth rate for the security business is greater than 25%. The company has more than 5,200 consultants, with 67% of the staff based in India, as Wipro focuses on an offshore service model. At the same time, Wipro is aggressively hiring staff on regions outside of India, building a truly global practice. Wipro provides good coverage in the North American, European, and Australian markets. Clients mentioned that communication skills and cultural and language differences handicapped Wipro; however, Wipro's move toward global hiring should begin to address these concerns. The company's consultants display a tremendous work ethic. Wipro's clients reported that Wipro employees simply refuse to miss agreed targets. Customers will realize strong value for their money with Wipro.
- **HP is developing into a strong competitor with success in staffing, infrastructure, and growth.** The integration of EDS and Vistorm into HP Information Security has fully transpired since Forrester's last evaluation of this market, and HP now has a true global presence with good-quality consultants. HP offers a wide range of services; however, the number of clients benefiting from these services is significantly lower than that of their competitors, thus reducing the opportunity for iteration and refinement. HP's growth rate for its risk-based consultancy services is outstanding, at more than 70%. Client references pointed to responsiveness, product impartiality, and fixed-price engagements as areas of strength, and account management and lack of certain vertical expertise as areas with room for improvement. HP is a large organization, with 3,000 security consultants, and a strong presence in infrastructure and device security; with those strengths, it has the potential to become a major player in the security consultancy marketplace. Organizations looking to grow with their consulting partner or leverage their existing investment in HP infrastructure services may find HP's security consulting services an interesting proposition.

- **Verizon demonstrates strong incident response skills, but lack of global coverage is restrictive.** Verizon has battled to gain brand awareness within the security consultancy space and has succeeded thanks to its incident analysis and strong PCI practice. Although some of the company's higher-level solutions (for GRC and strategy, for example) may not be as sophisticated as those of larger competitors, the company does offer a wide range of solutions, including strong offerings in application security, biometrics, DLP, and IAM, many of which it will also subsequently operate. Client feedback stressed the flexibility of the Verizon consultants and its strength in incident response; areas of potential improvement included Verizon's comparatively low number of consultants (just over 400) and weak global coverage, as well as challenges with internal collaboration and communication. Organizations looking for a consulting project that will roll seamlessly into an MSSP engagement should consider Verizon.
- **BT Global Services delivers pragmatic solutions, with a focus on technology.** BT was the other organization that stood out because of its unique perspective and approach to client engagement; the company's spokespeople come across as very honest and candid, suggesting that clients are likely to receive straightforward advice, even if it meant BT recommending a course of action that BT could not support. BT focuses on the delivery of predefined security service packages and does not offer regulatory- or compliance-related services. BT continues to focus and build on its quick, fixed-price engagements called "Quick Starts," and these are well liked in the market. Although BT's staff is relatively small and inexperienced (with an average of fewer than five years of experience), the company has a strong presence in the UK and continental Europe. BT's client references applauded the firm's professionalism, price, and technical ability. BT plays to these strengths, ensuring that the customers receive high-value consulting using strong security technology solutions. Clients looking for a strong partner with cost-effective pragmatic security solutions and great technical abilities should consider BT.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of data sources to assess the strengths and weaknesses of each service provider:

- **Consulting firm surveys.** Forrester surveyed the consulting firms on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two to three of each consulting firm's current customers.
- **Methodology reviews.** Having a well-defined methodology and consultants trained in the methodology's use is the hallmark of a mature consultancy. This year, Forrester requested samples of the methodologies these firms use to perform engagements.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

¹ John Kindervag provides Forrester's perspective on increased threats in an already published document. For more information, see the November 1, 2011, "[Defend Your Business From The Mutating Threat Landscape](#)" report.

Chris McClean outlines the future for security and risk (S&R) executives working to build their organization's governance, risk, and compliance (GRC) program. For more information, see the May 24, 2012, "[Navigate The Future Of Compliance And Risk Management](#)" report.

² As security grows in importance and complexity, so we see an increased need for skilled staff. Unfortunately, the need is not matched by supply and, as such, the security recruitment marketplace has become competitive and potentially expensive. For more information, see the June 14, 2012, "[Recruit And Retain An Information Security Team](#)" report.

- ³ The role of the chief information security officer (CISO) is increasingly central to many organizations; however, it has many guises. No two CISOs have exactly the same roles and responsibilities, and job titles vary widely. Yet despite these variances, each faces the same challenges as the role approaches a key point in its evolution. For more information, see the March 5, 2012, “[Role Job Description: Chief Information Security Officer](#)” report.
- ⁴ Business and security alignment has become an important discussion for security and risk professionals. For more information, see the July 18, 2011, “[Don't Bore Your Executives — Speak To Them In A Language That They Understand](#)” report.
- ⁵ Security and risk pros need to measure the effectiveness of their security programs. You get what you measure, and metrics are an important technique in getting to an improved security posture. For more information, see the January 17, 2012, “[Develop Effective Security Metrics](#)” report.
- ⁶ The bring-your-own-technology (BYOT) phenomenon is no longer driven by a small cadre of do-it-yourselfers choosing their own devices for work-related computing tasks. BYOT now spans hardware devices, platform and application software, and web-based services like storage and collaboration. For more information, see the June 12, 2012, “[Charting The Rising Tide Of Bring-Your-Own Technology](#)” report.
- ⁷ IT decision-makers and influencers say that cloud is a critical or high priority and security and risk pros don't have the power to veto these changes. For more information, see the October 29, 2010, “[Q&A: Demystifying Cloud Security](#)” report.
- ⁸ Despite growing risk profiles and threat landscapes, security organizations still come under financial pressure. CISOs continually express the need for a method to prioritize their security spending and answer such questions as “Am I spending too little or too much?” and “How can I do more with less?” For more information, see the October 2, 2012, “[Determine The Business Value Of An Effective Security Program — Information Security Economics 101](#)” report.
- ⁹ During the past 24 months, we've witnessed an alarming increase in high-profile security attacks: Sony, Epsilon, and Stratfor are just three of numerous examples that could be named from 2011 alone. These stories draw the attention of industry leaders and governments and highlight the severity of cyber-attacks. For more information, see the March 26, 2012, “[Develop A Change Plan For Your Security Program](#)” report.
- ¹⁰ There are more than 1 billion active Facebook accounts, more than 500 million Twitter accounts (unofficially), and more than 175 million LinkedIn members (and approximately two new members joining every second); it's safe to say that social media is here to stay. For more information, see the November 29, 2012, “[Manage The Risks Of Social Media](#)” report.
- ¹¹ Forrester cannot share the source because we obtained this information from an interview conducted under NDA.

About Forrester

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« SEAN RHODES, client persona representing Security & Risk Professionals

