

The Forrester Wave™: Cybersecurity Consulting Services In Asia Pacific, Q4 2019

The 10 Providers That Matter Most And How They Stack Up

by Jinan Budge
October 30, 2019

Why Read This Report

In our 23-criterion evaluation of cybersecurity consulting providers in Asia Pacific (AP), we identified the 10 most significant ones — Accenture, Deloitte, EY, IBM, KPMG, NTT, PwC, Tech Mahindra, Trustwave, and Wipro — and researched, analyzed, and scored them. This report shows how each provider measures up and helps security and risk (S&R) professionals select the right one for their needs.

Key Takeaways

PwC, Trustwave, EY, And Deloitte Lead The Pack

Forrester's research uncovered a market in which PwC, Trustwave, EY, and Deloitte are Leaders; Accenture, KPMG, and Wipro are Strong Performers; IBM and NTT are Contenders; and Tech Mahindra is a Challenger.

Innovation, Vision, And The Ability To Engage Executives Are Key Differentiators

As threats evolve and digitization becomes more complex, customers look for service providers that have a strong cybersecurity consulting practice vision, innovate with IP and asset-based consulting, and focus on engaging all the way up to executive management. Firms with these capabilities position themselves to deliver robust, effective, and customized offerings to their clients.

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by [Jinan Budge](#)

with [Laura Koetzle](#), [Michael Barnes](#), Seles Sebastin, and Bill Nagel

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Related Research Documents

[The Forrester Wave™: Global Cybersecurity Consulting Providers, Q2 2019](#)

[The Forrester Wave™: Midsize Cybersecurity Consulting Services, Q2 2019](#)

[Now Tech: Cybersecurity Consulting Providers In Asia Pacific, Q4 2019](#)



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Asia Pacific Needs A Less Insular Perspective On Cybersecurity

CISOs in Asia Pacific have traditionally preferred to establish relationships with cybersecurity consulting providers and stick with them over the long term. Now, however, AP CISOs recognize that this approach leaves them overly dependent on a single firm and its skills, and they are willing to branch out. This increased competition has driven providers in AP to innovate faster in pursuit of differentiation. Successful providers will help AP CISOs communicate to their boards and navigate the maze of internal and technical challenges they will encounter in their transformation. As a result of these trends, AP cybersecurity consulting customers should look for providers that:

- › **Extend local expertise with global insight and best practices.** AP CISOs want local experts who can marshal their firms' best practices and tools from around the globe and apply them in AP. EY, Accenture, and KPMG all have tightly coupled local and global leadership teams, which gives them the desired global perspective. In particular, NTT and PwC customers appreciated the firms' ability to call upon and use global resources when needed. But tread carefully: Look for a provider that minimizes bickering between its local and global teams by aligning them to common objectives and which does not force you to jump through bureaucratic hoops with multiple statements of work.
- › **Innovate with asset-based consulting capabilities.** As in our recent [“The Forrester Wave™: Global Cybersecurity Consulting Providers, Q2 2019”](#) report, asset-based consulting — which Forrester defines as services that include unique IP that the consultancy has built on software-as-a-service, cloud, and platform-based models — stood out as a major differentiator. Examples include Trustwave's Security Colony, PwC's Value-at-Risk platforms, and Accenture's Integraph platform.
- › **Demonstrate excellence in talent acquisition, development, and retention.** Expect your provider to field a talented team with a diversity of backgrounds and perspectives, including nontraditional security capabilities like change management. While most providers are making a genuine effort to encourage diversity of all sorts into their business, they all have more work to do to increase gender diversity in leadership positions. Firms that manage to close that gap will have the opportunity for the fastest growth in the region. It also matters how your provider treats its staff; if team members seem constantly stressed, they're at risk of burnout, which will jeopardize your project's timeline.

Evaluation Summary

The Forrester Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our Wave evaluations and other reports on cybersecurity consulting service providers.¹

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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FIGURE 1 Forrester Wave™: Cybersecurity Consulting Services In Asia Pacific, Q4 2019

THE FORRESTER WAVE™
Cybersecurity Consulting Services In Asia Pacific
Q4 2019



The Forrester Wave™: Cybersecurity Consulting Services In Asia Pacific, Q4 2019

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FIGURE 2 Forrester Wave™: Cybersecurity Consulting Services In Asia Pacific Scorecard, Q4 2019

	Forrester's weighting	Accenture	Deloitte	EY	IBM	KPMG	NTT	PwC	Tech Mahindra	Trustwave	Wipro
Current offering	50%	3.36	3.72	3.74	2.10	3.74	2.08	4.26	1.18	4.08	2.64
Key differentiators	9%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	1.00	5.00	1.00
Customer satisfaction	9%	3.00	3.00	3.00	1.00	5.00	3.00	5.00	1.00	5.00	3.00
Executive engagement and business acumen	9%	3.00	5.00	3.00	1.00	5.00	3.00	5.00	1.00	3.00	1.00
Security team engagement	9%	3.00	3.00	3.00	3.00	3.00	3.00	5.00	3.00	5.00	1.00
Engagement delivery model innovation	9%	3.00	3.00	5.00	1.00	3.00	1.00	3.00	1.00	5.00	3.00
IP- and asset-based consulting	9%	5.00	3.00	3.00	1.00	3.00	1.00	5.00	1.00	5.00	3.00
Pricing and distribution models	9%	3.00	3.00	5.00	3.00	3.00	1.00	5.00	1.00	3.00	5.00
Recruitment and retention	10%	3.00	3.00	5.00	3.00	5.00	1.00	3.00	1.00	3.00	3.00
Security strategy consulting	9%	3.00	5.00	3.00	1.00	3.00	3.00	5.00	1.00	3.00	3.00
Governance, risk, and compliance	9%	3.00	5.00	3.00	3.00	5.00	1.00	5.00	1.00	3.00	3.00
Technical consulting and assessment	9%	5.00	5.00	5.00	3.00	3.00	3.00	3.00	1.00	5.00	3.00
Strategy	50%	3.57	4.14	4.14	2.72	3.00	2.14	3.86	1.57	3.86	2.72
Cybersecurity focus	14%	3.00	5.00	5.00	1.00	3.00	3.00	3.00	1.00	5.00	1.00
Cybersecurity consulting vision	14%	3.00	3.00	5.00	3.00	3.00	1.00	3.00	1.00	5.00	3.00
Service improvement road map	14%	3.00	3.00	5.00	3.00	3.00	1.00	5.00	1.00	3.00	3.00
Go-to-market strategy	14%	5.00	5.00	3.00	3.00	3.00	1.00	3.00	3.00	3.00	3.00
R&D initiatives	14%	3.00	3.00	5.00	3.00	3.00	3.00	5.00	1.00	3.00	5.00
Staff development and career paths	14%	5.00	5.00	3.00	3.00	3.00	3.00	3.00	3.00	5.00	1.00
Partnership ecosystems	14%	3.00	5.00	3.00	3.00	3.00	3.00	5.00	1.00	3.00	3.00

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

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FIGURE 2 Forrester Wave™: Cybersecurity Consulting Services In Asia Pacific Scorecard, Q4 2019 (Cont.)

	Forrester's weighting	Accenture	Deloitte	EY	IBM	KPMG	NTT	PwC	Tech Mahindra	Trustwave	Wipro
Market presence	0%	3.40	5.00	3.80	3.80	3.80	2.60	4.20	3.00	1.40	1.80
Regional revenue	20%	5.00	5.00	3.00	5.00	3.00	1.00	5.00	1.00	1.00	1.00
Regional presence (customers)	20%	3.00	5.00	5.00	5.00	3.00	3.00	3.00	3.00	1.00	1.00
Regional presence (delivery)	20%	3.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	1.00	3.00
Regional engagement size	20%	5.00	5.00	1.00	3.00	3.00	1.00	3.00	5.00	1.00	3.00
Regional practice size	20%	1.00	5.00	5.00	3.00	5.00	3.00	5.00	1.00	3.00	1.00

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

Vendor Offerings

Forrester included 10 vendors in this assessment: Accenture, Deloitte, EY, IBM, KPMG, NTT, PwC, Tech Mahindra, Trustwave, and Wipro.

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- › **PwC shines with impressive IP-based consulting.** PwC targets its impressive range of assets — like its value-at-risk offering and virtual-reality simulated cybercrisis environments — at boards and executives. It aims to use these assets to create a deeper understanding of and support for key security challenges among those stakeholders. PwC also has strong intellectual property (IP)-based consulting offerings for CISOs, such as its identity and access management automation and ethical hacking bot. PwC regularly engages regulators throughout Asia Pacific and provides thought leadership sessions to board institutions in the region, such as the Australian Institute of Board Directors.

PwC has a demonstrated ability to use its global strengths to adapt to agile ways of working. Reference clients were happy with the firm's expertise, noted that PwC was a true partner and advisor across the region, and praised the firm's positive internal culture. But customers also cited

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a lack of innovation in delivery and a tendency among PwC's teams to act as order-takers. Clients also found that PwC struggled to get global expertise to the table due to internal challenges and politics. CISOs who seek to engage their boards and executives in the cybersecurity conversation will find a match in PwC.

- › **Trustwave brings the most innovative platform to the market via Security Colony.** Trustwave acquired Security Colony through its purchase of Hivint in Australia. Security Colony clients agree to allow Trustwave to retain ownership of the deliverables that the firm creates so it can reuse them with other clients. Security Colony is the only offering in AP to follow that model, which reduces wasteful spending and allows organizations to learn from each other. Trustwave's consulting services complement its suite of pure-play technical solutions via SpiderLabs and its managed security services business. Trustwave delivers a compelling virtual CISO service, which resonates with customers in heavily regulated environments that don't have the resources to build their own security teams.

Trustwave's footprint in AP is still small compared with most of the other providers in this assessment; the firm primarily offers services in Australia and Singapore. Trustwave's reference customers were the most enthusiastic of any that we interviewed; they were hard-pressed to find any areas of improvement. Clients lauded Trustwave's quality, subject-matter expertise, commercial acumen, and depth of understanding of their requirements. Trustwave has two strong leaders who have attracted many customers in Australia, and the firm may struggle to scale that personal appeal to other parts of AP as it grows. Trustwave is suitable for CISOs seeking a reliable, no-nonsense service with substantial operations in Australia or Singapore, innovative delivery models, and quality delivery.

- › **EY extends the risk conversation by adding trust and purpose to the discussion.** EY was one of the first providers to add trust-based, purpose-driven conversations to its go-to-market formula to help clients. This extends its offerings beyond the traditional consulting mix of risk, threat intelligence, and privacy. Under new global leadership, EY is evolving its offerings in AP to tighten its industry alignment, infuse cybersecurity into all of its offerings, and increase automation. Cybersecurity is one of EY's seven key growth drivers; the firm works with clients, alliance partners, startups, and innovation funds to drive investments in four key areas: cloud, operational technology (OT) security, analytics, and physical security.

The EY customers we interviewed see the firm as a true partner; they praise EY for being innovative and proactive, answering questions quickly, and challenging their thinking. However, clients found that EY's consultants overpromised and then fell short, leaving them dissatisfied with the firm's engagement management capabilities. AP CISOs who are looking for a partner that will challenge them to move beyond the status quo and support them in their transformation journey should shortlist EY.

- › **Deloitte aims to use its Tilt to Asia strategy to bring more global offerings to AP.** Depending on the engagement, Deloitte can successfully operate at the board level, act as an advisor to the

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CISO, provide deep knowledge of compliance, and deliver product-specific implementations. The firm launched its “Tilt to Asia” initiative, which will see it develop additional localized cyberassets like the Deloitte Intelligence Service Portal and accelerators for penetration testing and strategy consulting for every major Asian market in its preferred language(s), with a significant focus on Japan and China.

Deloitte wins work on the basis of its deep relationships, ability to adapt to its customers’ cultures, and presentation style. Reference clients appreciated the continuity, flexibility, and partnership of Deloitte consultants and the global perspective the firm brings to all of its engagements. Customers cautioned that the Deloitte teams they worked with didn’t provide enough support to navigate their organizational changes. Deloitte is an excellent choice if you need a pragmatic provider with global and industry breadth and expertise in overcoming the objections of risk-averse executives.

Strong Performers

- › **Accenture brings technical depth to business insight.** In AP, Accenture is better known for its technical implementations than its security consulting expertise. Yet its portfolios of consulting offerings and IP assets — such as iDefense IntelGraph and Zoran automated entitlement analytics — are both broad and deep. Far from staying in the technical weeds, Accenture’s assets demonstrate value at all levels, from security analysts to CISOs to boards of directors. Recently, Accenture has given its AP security offerings more prominence by separating them from its technology services portfolio. As client perception always lags the reality of provider changes, Accenture must promote the now-independent AP security practice, especially its ability to translate technical solutions into business value.

Reference customers cited Accenture’s professionalism, commitment, and ability to understand business as its key strengths. However, clients struggled with Accenture’s premium price and its limited number of security consultants. Accenture is a good fit for mature organizations that want to add strong technology tools and depth to support their business decisions.

- › **KPMG uses industry and client knowledge to deliver complex programs.** For KPMG, cybersecurity is both a global and an AP regional priority, and AP cybersecurity has a seat on the global leadership team. KPMG has a deep understanding of, and mature go-to-market strategies for, Australia and New Zealand (ANZ), China and Hong Kong, India, Japan, Singapore, and Southeast Asia. KPMG has a broad and creative range of assets, like Metrics 360 and KPMG Digital Responder, for all stakeholder groups, including executives and CISOs. It demonstrates market-specific thought leadership by, for example, engaging regulators in Singapore, leading the ASX 100 Cyber Health Check, and mentoring startups in Australia.

The KPMG clients we interviewed valued the firm’s multidisciplinary skills and its ability to navigate large, complex organizations and bring stakeholders on the journey. While customers found the global perspective that KPMG brought to the engagements helpful, they also noticed friction between local and global teams and a gap in skills between local and global resources. KPMG

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has work to do in bringing its global capabilities to AP; for example, KPMG's i-4 forum for security leaders is not yet operational in AP. If you're seeking a partner with an in-depth understanding of your business and your market(s) within the AP region, engage KPMG.

- › **Wipro provides flexibility but lacks consistency in creativity and innovation.** Wipro offers a comprehensive set of cybersecurity consulting services throughout the AP region, but the bulk of its cybersecurity engagements are technology deployments like solution design, architecture, and deployment and technology rollouts. Wipro's service improvement road map includes OT security, internet of things security, and crisis management services.

Feedback from Wipro's reference customers was unusually varied, ranging from extraordinarily positive to decidedly mixed. Nearly all of them clients were happy with Wipro's resource availability and customer-obsessed culture, which allowed flexibility on scope. However, this flexibility sometimes resulted in overworked teams, and clients worried about burnout. Customers unhappy with Wipro felt that its solutions lacked creativity; often had to escalate to Wipro's leadership to get things done; and thought that Wipro did too much selling. Wipro is a good fit for CISOs who know exactly what they need from a cybersecurity service provider and want a technology-focused partner to execute that plan.

Contenders

- › **IBM has a broad portfolio, but its execution falls short in AP.** IBM's AP clients are predominantly in ANZ, India, Japan, Singapore, and South Korea. IBM helps customers to define their security operations strategy and to design, implement, and operate the service. Recent projects include medical device security in Singapore; IBM's partnership with the UK's National Health Service led it to provide similar services to the health sector in Thailand. IBM is often an incumbent and wins cybersecurity consulting work through existing relationships within clients' broader technology department.

IBM claims to differentiate by delivering end-to-end managed security services, including building services for clients rather than just providing slide decks. That claim resonates with AP CISOs, most of whom have had bad experiences with consulting engagements that yielded little more than fancy slideware. However, during IBM's demonstration for this evaluation, it was unable to provide any nonslideware client deliverables. Reference clients complimented IBM's professionalism and general helpfulness — but other clients we interviewed reported that their IBM teams were unable to deliver key offerings like technical strategies for vulnerability management successfully. Those clients were disappointed with four things: lack of technical expertise, poor project management, subpar delivery, and IBM's inability to work well with client teams during escalations. Clients that use IBM products and services today will find a match in IBM security consulting.

- › **NTT unites several security brands, but still delivers a mediocre service.** NTT Security, NTT Communications, Dimension Data, and WhiteHat Security have all come together under the

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NTT banner to deliver integrated services to clients. NTT security consultants work alongside the managed security services business to deliver security by design to clients. NTT uses the Sherwood Applied Business Security Architecture (SABSA) methodology to allow clients to align business objectives to security controls and bring depth to its consulting offering.

NTT's offerings are standard and unambitious in a market that is looking for cutting-edge cybersecurity consulting solutions. NTT has some good IP — such as its online maturity assessment — but lacks important asset-based offerings for execs. Reference customers appreciated NTT's willingness to partner, understand, and solve problems. The clients we spoke with were also happy with the firm's adaptability, agility, and flexibility but found NTT's project and change management lacking; some felt ignored when they raised quality issues. Those customers also noted that NTT lacked OT security capabilities in the region and thus had to use global resources to deliver what it sold as a local service. If you're already committed to the SABSA methodology, consider NTT.

Challengers

- › **Tech Mahindra has an unambitious and perfunctory service offering.** Tech Mahindra provides basic services like assurance, audit, and compliance projects, but lacks boardroom-specific offerings and falls short on strategic and security program consulting innovations. The firm positions cybersecurity consulting as one of its “big bets,” but primarily uses its strength as an outsourcer to win engagements. Notably, Tech Mahindra offers free assessments of industrial control systems and OT networks to win new clients.

Tech Mahindra's automated tools to perform maturity and OT assessments remain basic, are populated manually, and have a generally technical look and feel. Its service road map was the least innovative of all of the road maps we reviewed for this evaluation. The clients we interviewed were positive about Tech Mahindra's pricing, the technical competence of its consultants, and the firm's breadth of capability. However, those customers found that they had to manage their Tech Mahindra teams more closely than they expected and that the projects were slow to start and delivered late. Tech Mahindra is a solid choice for AP CISOs who need standard governance, risk, and compliance services on a tight budget.

Evaluation Overview

We evaluated vendors against 23 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include Asia Pacific recruitment and retention, executive engagement and business acumen, IP- and asset-based consulting, and security strategy consulting.

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- › **Strategy.** Placement on the horizontal axis indicates the strength of each vendor's strategy. We evaluated cybersecurity focus, cybersecurity consulting vision, Asia Pacific go-to-market strategy, and staff development and career paths.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's regional presence in both customers and delivery as well as the size of its Asia Pacific practice.

Vendor Inclusion Criteria

Forrester included 10 vendors in the assessment: Accenture, Deloitte, EY, IBM, KPMG, NTT, PwC, Tech Mahindra, Trustwave, and Wipro. Each of these vendors has:

- › **Sizable revenues from cybersecurity consulting.** The annual revenue of cybersecurity consulting for each of the evaluated service providers is at least \$15 million.
- › **A large client base.** Evaluated service providers each claim at least 70 cybersecurity consulting clients in Asia Pacific.
- › **Strong regional presence with distribution of revenue and clients.** Evaluated service providers had more than 10% of regional cybersecurity consulting revenue and clients in two or more Asia Pacific countries.
- › **Breadth of cybersecurity consulting services.** Each service provider provides guidance and implements solutions in a number of different cybersecurity consulting domains, but specifically has three or more engagement types that generate more than 10% of regional cybersecurity consulting revenue, with security strategy and program transformation as a requirement.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 16, 2019 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ See the Forrester report "[The Forrester Wave™: Global Cybersecurity Consulting Providers, Q2 2019](#)" and see the Forrester report "[The Forrester Wave™: Midsize Cybersecurity Consulting Services, Q2 2019](#)."

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