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Deloitte Is A Leader In Security Consulting With Solid Depth And Global Reach

The Forrester Wave™ Vendor Summary, Q3 2007

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EXECUTIVE SUMMARY

Deloitte has the largest pool of security consultants in the market, and its global reach includes engagements in more than 100 countries. Security, privacy, and information risk management services within the company are integrated into a single enterprise framework, with a mature perspective focused on client value. In our evaluation, Deloitte's current security offering and market presence took the top spot among all other service providers, although its market strategy score slightly trailed its close rival. Its focus on risk management and privacy and its willingness to invest in R&D activities makes it an excellent choice for those looking for technology expertise coupled with sound strategic advice and strong business orientation. Deloitte brings a pragmatic and mature perspective and is best suited for medium- and large-scale, integrated projects requiring information risk management and security services.

DELOITTE IS BEST SUITED FOR COMBINED SECURITY AND RISK MANAGEMENT SOLUTIONS

Based in New York, N.Y., Deloitte's staff numbers approximately 135,000 professionals with offices in more than 100 different countries. The company provides services in the areas of audit, tax, consulting, and financial advisory. Its total revenue for 2006 was \$20 billion, and it achieved a 29% growth in risk management service revenues over 2005 figures.

Forrester evaluated Deloitte's current offering and strategy for security consulting against approximately 80 criteria (see Figure 1). The firm gained top marks for its global reach and had the highest overall score for strategic consulting services. Its high scores in design and implementation were driven primarily by capabilities in IT compliance and information risk management (RM), which were better developed than more technical areas such as applications, infrastructure and operations, and wireless and remote access. Overall, Deloitte is an especially good fit for buyers that:

- **Require strategic guidance for implementations combining security, RM, and compliance.**

Deloitte continues to demonstrate strong offerings and strategy in its risk consulting practice, and integrating its risk management and security services offers a value-focused approach to client engagements.

- **Are planning large-scale projects with diverse geographical reach.** Deloitte's consulting staff is widely dispersed throughout the world, and this global presence offers clients significant value with relation to both project delivery and domain expertise.



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To see how Deloitte stacks up against nine other competitors, see the Forrester Wave™ evaluation of the security consulting market.¹

Figure 1 Deloitte Evaluation Overview

CURRENT OFFERING	
Value proposition	Deloitte believes that organizations that practice strong security and privacy are more successful. The integration of security, privacy, and information risk management decision-making into a broader risk intelligence context creates resilience and sustainability, and enhances competitive advantage.
Client and account management	Deloitte has detailed and required processes to facilitate professional training, development, and collaboration of its consultants. Further, it has extensive account management and monitoring processes in place to deliver on client satisfaction.
Geographic footprint	Deloitte offers security advisory and implementation services around the world through a globally balanced practice. Centers of excellence, consistent methodologies, technology labs, and knowledge management systems allow cross-regional collaboration.
Vertical focus	Deloitte's dual industry and competency alignment is a cornerstone to its strategy and drives significant growth. Deloitte has an extensive offering that combines security, privacy, and IT risk management specialization with vertical expertise.
Global capabilities and reach	Deloitte delivers security services in more than 100 countries.
Client engagements	Deloitte estimates that it delivers more than 10,000 security and privacy engagements globally that are more than \$50,000 and is frequently engaged for multiple security projects at the same organization, for example, across geographies or business units.
Security strategy services	Deloitte's Risk Intelligent Enterprise vision provides a common context and language to advise CISOs, boards, and management on security, privacy, and IT risk issues. Deloitte regularly hosts "deep dive" forums for top-of-mind executive concerns.
Security architecture and implementation	Deloitte has deep capabilities and uses security, privacy, and IT risk and industry experts on projects. Its approach is to leverage the client's existing architecture, processes, and people to develop operationally and strategically integrated solutions.
Agility in service delivery	Deloitte serves organizations in all stages of development, including 80% of the Fortune Global 500 across industries. Globally, the primary market channels are through competency and industry verticals.

Source: Forrester Research, Inc.

Figure 1 Deloitte Evaluation Overview (Cont.)

STRATEGY

Future vision	Deloitte's vision is to be recognized as a leading provider of risk intelligent information security and privacy solutions by delivering a complete portfolio of services to help clients manage security and privacy risks across their organizations.
Go-to-market strategy	Deloitte serves organizations in all stages of development, including 80% of the Fortune Global 500 across industries. Globally, the primary market channels are through competency and industry verticals.
Integration with other service offerings	Deloitte's Lead Client Service Partner program, supported by technically specialized professionals, ensures that security and privacy are considered in the engagement and introduced as necessary. Deloitte's methodology also specifically incorporates these threads.
Future direction	Deloitte is committed to ongoing intellectual property (IP) development and continued focus worldwide on hiring and retaining top security, privacy, and IT risk management specialists.
Growth plans	Deloitte plans to aggressively scale existing security and privacy capabilities. The firm will also continue its investments in R&D as well as hiring and retention of top-caliber professionals to develop and deliver innovative new market offerings.

MARKET PRESENCE

Client base and engagements	Deloitte has delivered on thousands of security, privacy, and IT risk management projects of all sizes in the past year and continues to see aggressive growth in these offerings across geographies.
Staff dedicated to security	Deloitte has approximately 7,500 to 8,000 dedicated security, privacy, and IT risk management professionals globally, representing approximately 5% of its 135,000 total billable workforce.
Financials	Deloitte global revenues were \$20 billion for the year ending May 30, 2006, and are estimated to have grown 15% in the year ending May 30, 2007, with security consulting and advisory growth doubling the firms overall growth.
Partnership strength	Deloitte has extensive relationships that include services firms, hardware/software, and industry/R&D initiatives. Deloitte's strategy is to invest in a best-of-breed relationship portfolio.

Source: Forrester Research, Inc.



Go online to download additional in-depth data and scores for this vendor and other vendors included in this Forrester Wave evaluation.



SUPPLEMENTAL MATERIAL

Online Resource

The underlying spreadsheet for Figure 1 is available online. The spreadsheet includes more detailed data and scores for this provider.

This detailed data and scores for this provider are also available online through an Excel-based provider comparison tool that provides detailed service evaluations and customizable rankings.

The Forrester Wave Methodology

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

After examining past research, user need assessments, and provider and expert interviews, we develop the initial evaluation criteria. To evaluate the providers and their services against our set of criteria, we gather details of service qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the providers for their review, and we adjust the evaluations to provide the most accurate view of provider 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 providers based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged 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 provider evaluations regularly as service offerings and provider strategies evolve.

ENDNOTES

- ¹ Forrester evaluated leading security consulting service providers across 80 criteria and found that PricewaterhouseCoopers (PwC) and Deloitte established themselves as Leaders in the security consulting services market — thanks to their breadth of current offerings and their focus on future growth areas. KPMG International established itself as the next strongest with a rich current offering and solid strategy for growth. Ernst & Young (E&Y) and IBM have good market presence and an established client base but lack the breadth of offerings of the Leaders. Accenture has a strong infrastructure background and is ideal for companies looking to develop a security infrastructure and implementation projects but is not as strong in security strategy. Wipro has a relatively new security practice with impressive growth plans that leverage

its existing customer base. BT has a good vision and some good relationships that will enable growth, with success to date focused mostly in EMEA. VeriSign and Verizon Business are relatively small practices with a strong US presence and great customer satisfaction among their clients. See the September 25, 2007, "The Forrester Wave™: Security Consulting, Q3 2007" report.