

A global cybersecurity powerhouse putting customer-centricity and innovation at the forefront of its strategy



Dimension	Rank	Strengths	Key differentiators 5	Development opportunities															
HFS Top 10 position	1	<p>Organization: Accenture's security practice organizational structure is based on geographic market and domain leads and is overseen by a dedicated security management committee. The structure is customer and innovation focused, allowing Accenture to anticipate upcoming customer challenges, proactively collaborate with an extensive partner ecosystem, and propose tailored and innovative solutions.</p> <p>Growth: Cybersecurity is one of Accenture's four strategic priorities. The Accenture Security practice is growing at about 3x the rate of the market and competition (with double-digit growth). Cybersecurity services contributed 9% of overall revenue in 2021 and has grown by more than 70% over the past three years. Accenture's fastest-growing service areas are strategic security services (industry-specific focus), cloud security, and managed security services. Fifty-five percent (55%) of cybersecurity revenue comes from design, implementation, and transformation services. The total headcount has grown by 55% over the past three years, reaching almost 10,000 practitioners by the end of 2021.</p> <p>Go-to-market: Accenture has built deep expertise across all areas of the cybersecurity value chain. Accenture provides a wide range of cybersecurity offerings centered around cyber defense, applied cybersecurity services, and managed security services. Cybersecurity domains and offerings are horizontally integrated across industry groups and leverage vendor-agnostic capabilities and assets. Accenture Security has an investment strategy spanning multiple functional areas, including acquisitions, ecosystem partnerships, strategic investments in innovative start-up companies, security R&D (\$50 million+/year), and delivery excellence.</p> <p>Talent management: Two key strategies to retain key talent include a \$15.5 million investment in continuous professional development, with certifications through dedicated security learning academies and tailored coaching in reskilling centers, and upskilling programs, allowing security practitioners to increase fluency in emerging technology and security topics. Accenture pays special attention to ensuring security practitioners are cross-skilled with industry knowledge. It actively promotes various initiatives focused on inclusion and diversity in cybersecurity. Accenture has low attrition levels compared to the industry average.</p> <p>Outcomes: Accenture uses its proprietary business capability maturity models to help clients articulate business value, opportunities for improved security, and quantitative outcomes necessary to make the right investment and measure return. Accenture works with clients to innovate in security program maturity and measurement, and it has filed patent applications for asset, threat, vulnerability (risk) aggregation, and correlation (quantification) scoring.</p> <p>Voice of the customer: Clients recognize Accenture for its flexibility, ability to deliver effective change management programs, customer responsiveness, strong partnership ecosystem, and delivery excellence. One thing that stood out is the knowledge and expertise (domain, technical and industry benchmark) of delivery resources.</p>	<ul style="list-style-type: none"> Industry-specific and internally-developed IP supporting cybersecurity services. Client-focused approach with dedicated Security Account Leads. Deep domain expertise with end-to-end capabilities spanning 130+ sub-service offerings. Strong ecosystem partnerships. Security integration and engineering capabilities. Next-generation IT and OT security operations centers. Information-sharing ecosystems and threat exchanges. Cybersecurity co-innovation labs and hubs. Focused R&D and ability to quickly scale innovative cybersecurity portfolio. Comprehensive portfolio of new services aimed to tackle emerging threats. 	<p>Voice of the customer</p> <ul style="list-style-type: none"> Clients expect Accenture to better translate its innovation efforts into concrete and measurable value propositions. Clients expect Accenture to nurture relationships more effectively ("struggle to stay connected post the completion of the engagement"). 															
Ability to execute	1																		
Breadth and depth	2																		
Scale of cybersecurity business	1																		
Growth of cybersecurity business	1																		
Innovation capability	1				<p>Geographic spread of clients</p>	<p>Client industry distribution</p>	<p>Revenue distribution</p>	<p>Pricing model distribution</p>	<p>Revenue contribution and maturity across the cybersecurity value chain</p> <table border="1"> <thead> <tr> <th></th> <th>20%</th> <th>55%</th> <th>25%</th> <th>0%*</th> </tr> </thead> <tbody> <tr> <td>Assessment and readiness</td> <td>3.0</td> <td>3.0</td> <td>3.0</td> <td>3.0</td> </tr> </tbody> </table> <p>Service provider self-assessment: Mature (3.0), Emerging (3.0), Not a focus (3.0)</p>		20%	55%	25%	0%*	Assessment and readiness	3.0	3.0	3.0	3.0
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Assessment and readiness	3.0				3.0	3.0	3.0												
Strategy and vision	1				<p>Relevant acquisitions and partnerships</p> <p>Recent key acquisitions</p> <ul style="list-style-type: none"> Symantec Cyber Security Services, Deja Vu Security, Context Information Security, Revolutionary Security, Real Protect, Openminded, Sentor <p>Key partnerships</p> <ul style="list-style-type: none"> Akamai, AWS, Cisco, Claroty, CrowdStrike, CyberArk, Elastic, Forescout, ForgeRock, Google, IBM, InCountry, Interos, Micro Focus, Microsoft, Netskope, Nozomi Networks, Okta, Onapsis, One Identity, Oracle, Palo Alto Networks, Ping Identity, Prevaillon, Ripjar, Sailpoint, Salesforce, SAP, Saviynt, ServiceNow, Splunk, Symmetry systems, Tanium, Thales Transmit Security, TripleBlind, VMWare, Zscaler 	<p>Key clients</p> <p>Number of active clients: 3,172 % of active clients with revenue >\$11 billion: 59% Number of engagements in 2021: 7,041</p> <p>Key clients highlighted in the study:</p> <ul style="list-style-type: none"> A global telecom company A multinational manufacturer and distributor of electricity and gas A German consumer goods and services company A national broadband network provider A national payment systems provider 	<p>Global operations and resources</p> <p>Cybersecurity headcount: 10,000+ Cybersecurity-specific delivery locations: 264 (North America: 39%, Europe: 35%, Asia Pacific: 24%, Middle East/Africa: 1%, Latin America: 1%) Cybersecurity delivery centers: 14 Cybersecurity fusion centers: 10 Cyber ranges centers: 5 Security operations centers: 12 Cybersecurity labs: 2</p>	<p>Cybersecurity key in-house platforms and IP</p> <p>Platforms and internally developed IP: Managed Extended Detection & Response; Intelligent AppSec Platform; Secure Cloud; OT Critical Infrastructure Regulatory diagnostic; Utilities: Grid/Gas security program implementation kit; Government agency security monitoring and analytics; MxDR for OT; Data Source Qualification; Vehicle Security Operations Center</p> <p>Patents: Accenture has 930+ pending and issued patents globally for cybersecurity-related IP</p>											
Cybersecurity technology innovation	2				<p>OneOffice alignment</p>	<p>Voice of the customer</p>	<p>Emerging trends readiness</p>	<p>Co-innovation and collaboration</p>											
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*Revenue is not tracked against "Continuous improvement and innovation" as it is built into all of Accenture service offerings