

Market Share Analysis: Security Consulting Services, Worldwide, 2022

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By Analyst(s): Rustam Malik

Initiatives: [Technology Market Essentials](#)

The worldwide security consulting service market grew 12.5% in 2022 compared with 12.9% in 2021. The five largest vendors by revenue are Deloitte, EY, PwC, Accenture and KPMG.

Overview

Key Market Findings

- The security consulting service market reached \$29.8 billion in 2022, representing a 12.5% growth from \$26.5 billion in 2021. The growth drivers for the market continue to be stringent regulatory and compliance mandates, high spending by the government sector, demand for tailor-made vertical-specific solutions, an evolving threat landscape and ongoing digital transformation initiatives.
- The top five vendors by market size grew at a massive 18.4% to increase their overall market share from 51.0% in 2021 to 53.6% in 2022. The remaining vendors grew at 6.4%. This indicates consolidation within the market.
- North America, followed by Europe, retained the top spots in terms of overall market share. The Greater China, North America, Middle East and North Africa, and Japan regions outgrew the overall market growth rate.

Vendor Performance Highlights

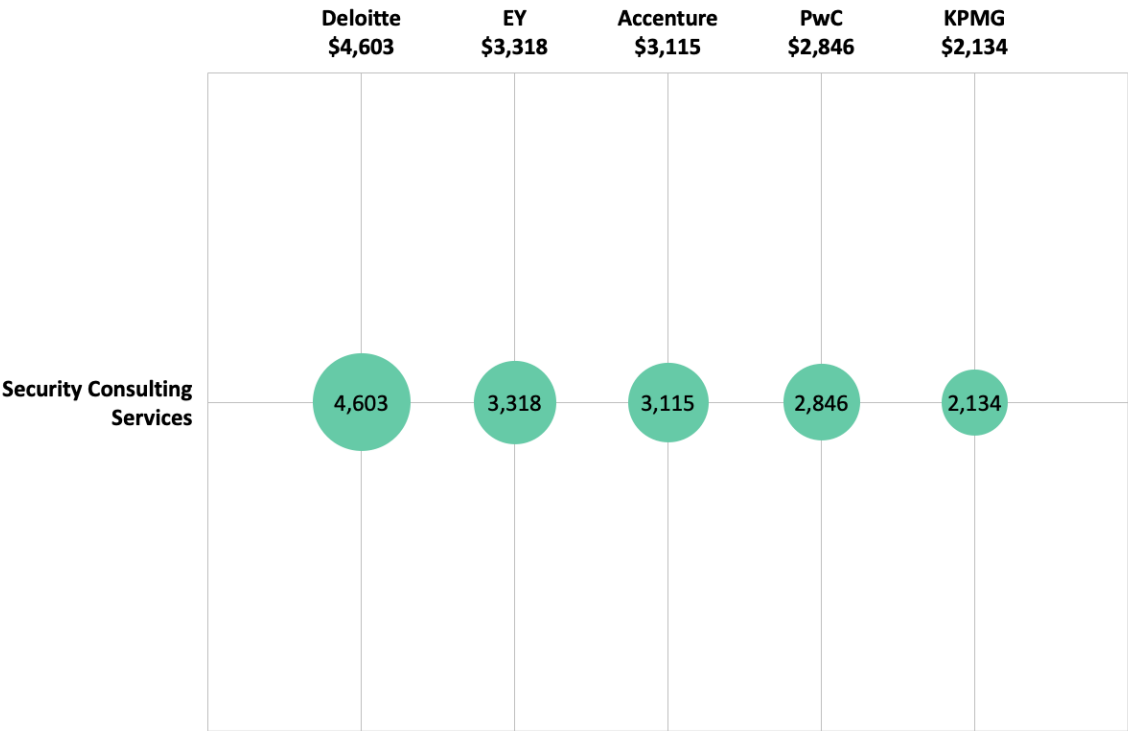
- The top five security consulting providers — Deloitte, EY, PwC, Accenture and KPMG — retained their positions. Accenture was the fastest-growing vendor among the top five vendors.
- Accenture has displaced PwC for third place. DXC Technology reentered the top 10 security consulting provider list after being dropped in 2021. Atos has dropped off the list.
- Collectively, the top 10 security consulting providers represented a market share of 65.9% (from 63.7% in 2021). Six of the 10 providers grew at double-digits rates; four out of the top 10 providers outperformed the market growth rate of 12.5%.

Market Share Data

Figure 1 shows the worldwide revenue for the top five security consulting service providers in 2022.

Figure 1: Top Five Security Consulting Service Providers, Worldwide, 2022

Top Five Security Consulting Services Providers, Worldwide, 2022
Revenue (Millions of U.S. Dollars)



Source: Gartner (2023)
Note: The value and size of the bubbles represent 2022 revenue (millions of U.S. dollars), and the color coding represents positive or negative year-over-year change. A green bubble represents positive change and a red bubble represents negative change.
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Table 1 shows the top 10 security consulting service providers by market share in 2022.

Table 1: Top 10 Security Consulting Service Providers by Market Share in 2022

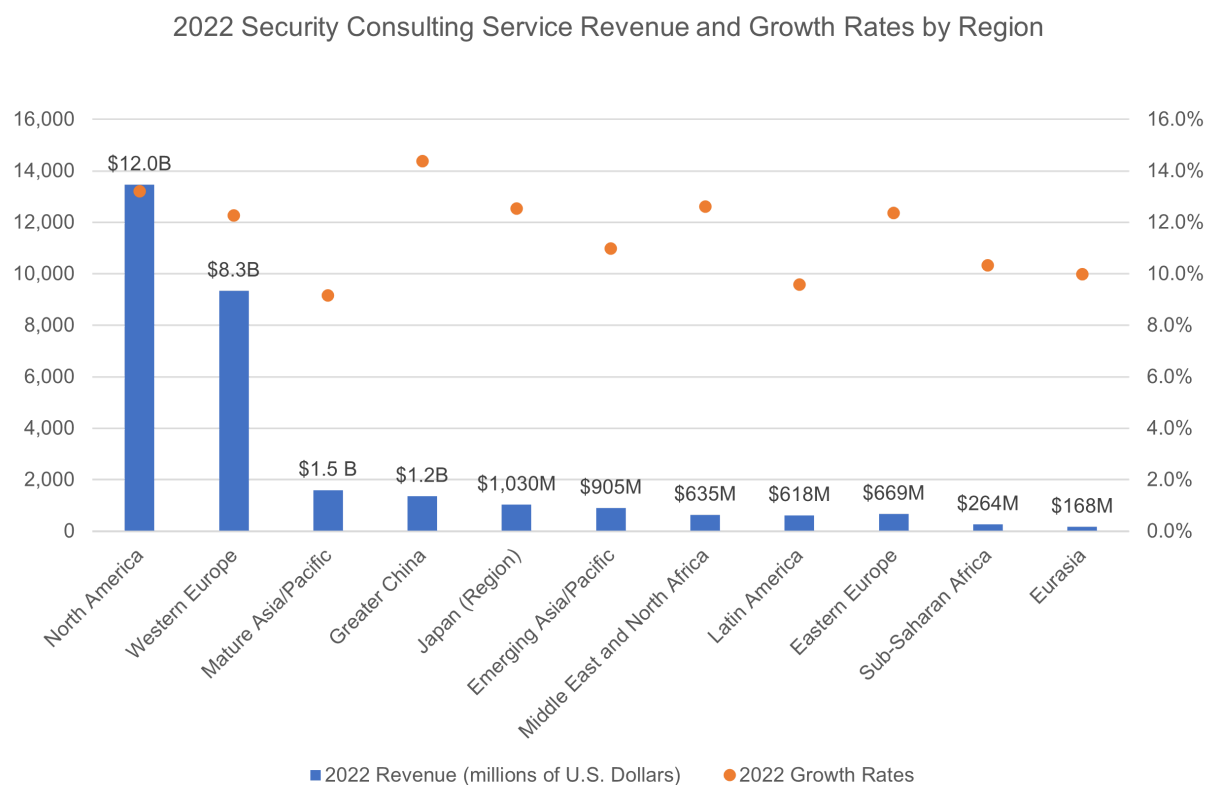
(Enlarged table in Appendix)

| 2021 Rank | ↓ | 2022 Rank | ↓ | Change in Rank | ↓ | Vendor | ↓ | 2021 (Millions of Dollars) | ↓ | 2022 (Millions of Dollars) | ↓ | 2022 Market Share (%) | ↓ | Growth Rate (%) | ↓ |
|--|---|-----------|---|----------------|---|---|---|----------------------------|---|----------------------------|---|-----------------------|---|-----------------|---|
| 1 | | 1 | | | | Deloitte | | 3,976 | | 4,603 | | 15.4% | | 15.8% | |
| 2 | | 2 | | | | EY | | 2,905 | | 3,318 | | 11.1% | | 14.2% | |
| 4 | | 3 | | ▲ 1 | | Accenture | | 2,148 | | 3,115 | | 10.4% | | 45.0% | |
| 3 | | 4 | | ▼ 1 | | PwC | | 2,625 | | 2,846 | | 9.5% | | 8.4% | |
| 5 | | 5 | | | | KPMG | | 1,878 | | 2,134 | | 7.1% | | 13.7% | |
| 6 | | 6 | | | | IBM | | 1,173 | | 1,313 | | 4.4% | | 11.9% | |
| 7 | | 7 | | | | Booz Allen Hamilton | | 694 | | 779 | | 2.6% | | 12.4% | |
| 8 | | 8 | | | | Capgemini | | 647 | | 703 | | 2.4% | | 8.7% | |
| 9 | | 9 | | | | Optiv Security | | 483 | | 517 | | 1.7% | | 7.0% | |
| 11 | | 10 | | ▲ 1 | | DXC Technology | | 395 | | 374 | | 1.3% | | -5.3% | |
| | | | | | | Other Security Consulting Service Providers | | 9,636 | | 10,181 | | 34.1% | | 5.7% | |
| | | | | | | Total | | 26,559 | | 29,883 | | 100.0% | | 12.5% | |
| Note: Numbers may not add to totals shown because of rounding. | | | | | | | | | | | | | | | |

Source: Gartner (July 2023)

The security consulting service market reached \$29.8 billion in 2022, representing a 12.5% growth from \$26.5 billion in 2021. The market continued to maintain its growth momentum in the post-COVID-19 world, with enterprises focused to be better prepared for an evolving threat landscape by investing in security consulting services including security-related business and IT consulting, as well as security assurance. Figure 2 shows the security consulting service revenue and growth rates by region.

Figure 2: Security Consulting Service Revenue and Growth Rates by Region, 2022



Gartner

Overall Market Segment Performance Analysis

Below are some notable regional highlights:

- Regional market share did not show much variation. North America and Western Europe collectively accounted for 76.3% of the total market in 2022.
- In terms of growth, Greater China, North America, Middle East and North Africa, and Japan outpaced the overall market, which grew at 12.4%
- Greater China was the highest growing region, which witnessed a growth rate of 14.3% in 2022. The high growth can be attributed to increase in spending by Chinese organizations to be compliant with Cybersecurity Law of the People's Republic of China.
- In North America, the U.S. federal government is heavily investing to improve its overall security posture. According to the March 2023 Analytical Perspectives document released by the White House, the federal budget proposes to spend \$74 billion on IT at civilian agencies in 2024. This includes approximately \$12.7 billion for civilian cybersecurity-related activities, an increase of 13% from the last year. ¹

- The Middle East and North Africa is another region where the governments are active in laying a sound cybersecurity framework. New regulations and initiatives by local cybersecurity councils in terms of vendor partnerships and endorsements are apparent.
- Japan's high growth in security consulting services is due to the high focus of the Japanese government to strengthen Japan's response to cyberattacks. Japan is facing a surge in the number of cyberattacks. The National Police Agency reported that 2022 saw a record high of 12,369 cybercrime cases that were uncovered by police. ² Spending on security consulting services is also increasing because of:
 - Organizations in Japan are undergoing rapid digital transformation
 - Japan is now opening more to the cloud, which is a little late compared to many other countries.

We have seen more partnerships and alliances happening between security consulting services firms and security product companies in 2022.

The key trends impacting the security consulting service market in 2022 were:

- **Government as a lucrative sector** — In recent years, governments across the globe are spending huge sums of money on security consulting services to understand, find, and implement the right strategies to enable smart city programs and modernization of public infrastructure. Many governments also take assistance from security consulting firms in designing and framing the compliance and regulatory policies for their nations. To gain business, security consulting firms are also preparing to win over competitors. IBM, for example, announced the acquisition of Octo to boost its U.S. government business. Octo primarily focuses on the U.S. government. ³ Another example is of Accenture, which acquired a U.K.-based cybersecurity consultancy called Context Information Security, which has done significant business with government organizations. ⁴
- **Providers' focus on tailor made offerings for various verticals** — Various industries are at different positions in terms of their digital transformation maturity curves. Adoption levels in terms of artificial intelligence (AI), connected devices or cloud technologies vary to a great extent. Besides, regulations governing these industries are quite specific and need relevant security solutions to address them. No single solution applies to all.

- **Providers developing capabilities around zero trust to meet buyer demand —**
Securing remote workforce is one of the top priorities for CTOs/CIOs/CISOs today as users become more geographically dispersed and a higher proportion of digital traffic occurs outside of the corporate network environment. Organizations are increasingly subscribing to cloud applications, and employees are accessing these from a wide range of locations, leveraging multiple connectivity options. This creates an immediate need for solutions that can validate user identity on an ongoing basis. Moreover, a U.S. Executive Order also requires agencies to have a zero-trust architecture implementation plan. The Office of Management and Budget (OMB) in correspondence to the Executive Order released a strategy document that requires federal agencies to meet some specific zero-trust goals by the end of Fiscal Year 2024. ⁵ In 2022, Deloitte launched its Zero Trust Access offering. ⁶ At the end of 2021, NTT started offering Zero Trust Security Services. ⁷
- **Providers increasingly delivering integrated solutions with embedded security —**
Security consulting providers are increasingly engaging with customer business line units to ensure security is integrated into all their products and service deliverables. The security consulting service providers help to embed security into digital transformation, Internet of Things (IoT), cloud, big data and AI initiatives of the customer organizations. They help to set up the right foundation for security by design.

Russian Invasion of Ukraine

In response to the Russian invasion of Ukraine that began on 24 February 2022 and was ongoing at the time of this publication, Gartner has excluded companies headquartered in Russia from our research and suspended market share coverage for Russia and the Eurasia region. The definition of the Rest of Eastern Europe has been expanded to include Russia and the countries previously covered in the Rest of Eurasia.

Exchange Rate Alert

In the recent economic environment, currency exchange rate fluctuations have been more volatile than we have become accustomed to in recent years. Foundational factors, such as interest rates, tariffs and economic sanctions, changed more rapidly and with less predictability notably throughout 2022. This can result in a wide divergence in growth rates between the default U.S. dollar view and when an alternative currency view is selected.

Top Vendors Analyzed

Deloitte

Deloitte remained the largest security consulting service provider in 2022 with 15.4% market share. Gartner estimates that from 2021 to 2022, Deloitte's security consulting service revenue grew 15.8%, reaching \$4.6 billion.

Deloitte aligns its security offerings to Strategy and Transformation, Application Security, Cyber Cloud, Detect and Respond, Identity, Infrastructure Security, Data and Privacy, and Emerging Technologies. Through its end-to-end advise, implement, and operate services approach, industry-tailored security consulting ("advise") services are foundational to creating business value and modernizing and transforming its clients operations. These services are backed by a portfolio of assets and an extensive ecosystem of technology and industry alliances, and are delivered through one of the following models:

- A stand-alone service involving security strategy, governance, roadmap, assessments, analysis and testing, architecture and design, threat intelligence, and incident response
- Bundled with its managed services (i.e., "Operate"), which are delivered through its modular SaaS platform solutions such as MXDR by Deloitte, Digital Identity by Deloitte, and Cyber Cloud Managed Services, as well as through hybrid Deloitte-client infrastructure
- Embedding security into broader digital business transformation projects, such as cloud application modernization and migration or implementation of technology systems

It also continues to grow its security capabilities through security-focused acquisitions, including three in 2022 combining services across the advise-implement-operate life cycle to support regional scaling, such as Hactiva in Australia, Makros in Chile, and IT-SS in Colombia.

EY

EY maintained its second rank in the security consulting services market in 2022 in terms of overall market share. Their market share grew from 10.9% in 2021 to 11.1% in 2022. The company witnessed a growth rate of 14.2% in 2022 with revenue increasing from \$2.9 billion in 2021 to \$3.3 billion in 2022.

EY Cybersecurity delivers its security services across the following strategic capabilities: Strategy, Risk, Compliance and Resilience; Data Protection and Privacy, Identity and Access Management; Architecture, Engineering and Emerging Technology; and Next-Generation Security Operations.

In 2022, EY focused on supporting organizations with their digital transformation and cloud adoption journeys. The company also announced an alliance with an IT services firm, Kyndryl, in the area of cybersecurity and cloud services, among others, to help its clients in mitigating the risks of these intricate initiatives. EY is also very active in building its thought leadership in the areas of zero-trust architecture approach for cybersecurity, and operational technology support for cybersecurity. The company claims to have full scope zero-trust services capabilities to support customers with their transformation initiatives, including assessment, design, implementation, and management. In 2022, EY and CrowdStrike expanded their global cloud security partnership. The alliance is expanded in the areas of zero-trust capabilities, identity assessment, protection against ransomware, incident response (IR), and recovery and remediation.

In terms of its geography focus, EY is expanding in the Asia/Pacific region, especially in Australia and New Zealand. In 2022, the company launched two cybersecurity centers in Auckland and Wellington, New Zealand, with a potential third in Christchurch. EY is also investing in Australia in terms of hiring cybersecurity talent to meet the growing demand in the region. EY has also been endorsed by Qatar's National Cyber Security Agency as one of eight professional services companies that has a proven track record in providing information security consulting and implementation services.

Accenture

Accenture climbed to third place in 2022 from fourth place in 2021. The company grew 45%, increasing its market share from 8.1% in 2021 to 10.4% in 2022. Accenture earned \$3.1 billion in security consulting services revenue in 2022.

The growth in 2022 can be attributed to a few factors:

- Accenture Security's portfolio spans across cyber industry, which includes OT, IoT, Internet of Medical Things (IoMT) security, cyber strategy, cyber protection, and cyber resilience. This depth and breadth of services align well with the emerging technology needs of organizations. Security continues to be a strategic area of focus for Accenture.

- Accenture's focus on developing deep industry-specific solutions, along with providing vertical specific training and upskilling of its staff, has paid off; the company successfully targeted organizations across different industry verticals, including rail, energy and utilities, healthcare and government, with specialized solutions. The company has developed services such as OT Security Program Development, OT Security Risk Assessments and OT Incident Response, which help it target connected ecosystems in industries such as utilities, manufacturing and healthcare. To target the government sector, the company is leveraging past acquisitions including Context Information Security, which has done significant business with government organizations.
- Leveraging past acquisitions to expand its customer base and regional presence, Accenture made four security-related acquisitions in 2021. Accenture acquired Brazil-based Real Protect as part of extending its presence and capabilities in Latin America. It also acquired Sweden-based security service provider Sentor and France-based Openminded to extend cyber defense and managed security services capabilities. Accenture continued its focus to support clients with their cloud transformation initiatives; Accenture acquired Linkbynet to enhance global cloud capabilities including cloud security services. Accenture is leveraging these recent acquisitions along with acquisitions and partnerships made in 2022 to increase its penetration within different sizes and verticals of organizations across the globe. The company also acquired in September 2022 Sentia's businesses in the Netherlands, Belgium and Bulgaria; the firm offers cloud control and optimization services including cloud security services. Accenture is pursuing different routes to market to target different sized organizations. Accenture partnered with Vodacom to cater to South African small and midsize organizations.

PwC

PwC slipped to fourth place during 2022 from its third-place ranking in 2021 in the security consulting services market in terms of market share. Its share of overall market size shrank from 9.9% in 2021 to 9.5% in 2022. The company achieved a growth rate of 8.4% in 2022 to grow from revenue of \$2.6 billion in 2021 to \$2.8 billion in 2022

PwC's Cybersecurity, Risk and Regulatory services are coupled with PwC's proprietary cyber and risk software products to deliver an "integrated solution" aligned to Strategy, Risk and Compliance, Incident and Threat Management, Info Governance and Privacy, Implementation, and Managed Services.

In 2022, PwC focused on building capabilities to support digital transformation initiatives especially in cloud, data and analytics. The company also acquired a data analytics consultancy firm called Sagence to bolster its data strategy and cloud transformation capabilities.

In terms of geography focus, PwC is expanding in Australia. In 2022, the company hired six new partners for its cybersecurity, trust and risk practices. Besides, PwC also invested in a new cybersecurity hub in Cardiff, Wales, United Kingdom. PwC has also been recognized by Qatar's National Cyber Security Agency as one of eight professional services companies that has a proven track record in providing information security consulting and implementation services.

KPMG

KPMG maintained its fifth-place rank in the security consulting services market in 2022 in terms of overall market share. Its share of market size remained almost consistent at 7.1% in 2022. The company witnessed a growth rate of 13.7% in 2022 with revenue increasing from \$1.8 billion in 2021 to \$2.1 billion in 2022

KPMG's cybersecurity services align to strategy and governance, cyber transformation, cyber defense and cyber response. These security services can be delivered as stand-alone engagements or integrated into KPMG's broader propositions around business and digital transformation, enterprise risk management, technology enablement, and data analytics through assets like the KPMG Lighthouse network.

In 2022, KPMG partnered with cybersecurity services company CPX to implement advanced cybersecurity solutions and services in the UAE. CPX's solution offerings range from cyber advisory and assessments to managed services. CPX has also been named among the key external partners for the UAE's UAE Cybersecurity Council.

In 2022, KPMG acquired a cloud security consulting firm called Fortica that specializes in cloud security posture management. This acquisition is seen to help KPMG expand its business in Canada. KPMG is also targeting the governance, risk, and compliance space in Canada. KPMG is actively targeting extended detection and response services. KPMG uses SentinelOne's Singularity XDR platform for cyberattack investigation and response services.

Mergers and Acquisitions

Table 2 highlights some notable merger and acquisition (M&A) activities in 2022. The M&A activity is expected to continue as means to expand capabilities, acquire vertical expertise and diversify geographic footprint.

Table 2: Security Consulting Services' Mergers and Acquisitions in 2022

(Enlarged table in Appendix)

| Acquiring Company ↓ | Acquired Company ↓ |
|---|--------------------|
| Accenture | Sentia |
| Alphabet (Google) | Mandiant |
| Deloitte | Makros |
| Deloitte | Hacktive |
| IBM | Octo |
| KPMG | Fortica |
| NCC Group | Adelard |
| Protiviti | R2integrated (R2i) |
| PwC | Sagence |
| Kroll | Crisp |
| Kroll | Resolver |
| Note: This M&A list is only representative and might not include all M&A that happened in 2022. | |

Source: Gartner (July 2023)

Evidence

¹ [14. Information Technology and Cybersecurity Funding \(Analytical Perspectives-FY24\)](#). GovInfo — U.S. Government Publishing Office (GPO).

² [Cybercrime in Japan hits record high in 2022 as ransomware cases surge](#). The Japan Times

³ [IBM to acquire Octo to boost its US government business](#). CIO.

⁴ [Accenture Acquires Context Information Security, a UK-Based Cybersecurity Consultancy](#). Business Wire.

⁵ [Executive Order on Improving the Nation's Cybersecurity](#). Cybersecurity and Infrastructure Security Agency.

⁶ [Deloitte Launches Zero Trust Access, a New Managed Security Service](#). Deloitte.

⁷ [NTT DATA Begins Providing "Zero Trust Security Service" Globally](#). NTT DATA.

Document Revision History

[Market Share Analysis: Security Consulting Services, Worldwide, 2021 - 17 May 2022](#)

[Market Share Analysis: Security Consulting Services, Worldwide, 2020 - 11 June 2021](#)

[Market Share Analysis: Security Consulting Services, Worldwide, 2019 - 27 May 2020](#)

[Market Share Analysis: Security Consulting Services, Worldwide, 2018 - 22 July 2019](#)

[Market Share Analysis: Security Consulting Services, Worldwide, 2017 - 10 December 2018](#)

[Market Share Analysis: Security Consulting Services, Worldwide, 2016 - 27 June 2017](#)

[Market Share Analysis: Information Security Consulting, Worldwide, 2015 - 5 July 2016](#)

[Market Share Analysis: Information Security Consulting, Worldwide, 2014 - 21 April 2015](#)

[Market Share Analysis: Information Security Consulting, Worldwide, 2013 - 16 May 2014](#)

[Market Share Analysis: Security Consulting, Worldwide, 2012 - 16 May 2013](#)

Recommended by the Author

Some documents may not be available as part of your current Gartner subscription.

[Market Share: Security Consulting Services, Worldwide, 2022](#)

[Emerging Tech: The Impact of Emerging Trends on Security Solution Demand](#)

[Emerging Tech Impact Radar: Security](#)

[Emerging Tech: Grow Your Security Service Revenue With Cybersecurity Validations](#)

[The Cybersecurity Market: Shifting Buyer Needs Creating Significant Growth Opportunities](#)

[How Gartner Estimates Market Share](#)

[Market Definitions and Methodology: IT Services](#)

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Table 1: Top 10 Security Consulting Service Providers by Market Share in 2022

| 2021 Rank ↓ | 2022 Rank ↓ | Change in Rank ↓ | Vendor ↓ | 2021 (Millions of Dollars) ↓ | 2022 (Millions of Dollars) ↓ | 2022 Market Share (%) ↓ | Growth Rate (%) ↓ |
|-------------|-------------|------------------|---|---------------------------------|---------------------------------|----------------------------|-------------------|
| 1 | 1 | | Deloitte | 3,976 | 4,603 | 15.4% | 15.8% |
| 2 | 2 | | EY | 2,905 | 3,318 | 11.1% | 14.2% |
| 4 | 3 | ▲ 1 | Accenture | 2,148 | 3,115 | 10.4% | 45.0% |
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| Total | | | | 26,559 | 29,883 | 100.0% | 12.5% |

Note: Numbers may not add to totals shown because of rounding.

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Table 2: Security Consulting Services' Mergers and Acquisitions in 2022

| <i>Acquiring Company</i> ↓ | <i>Acquired Company</i> ↓ |
|---|---------------------------|
| Accenture | Sentia |
| Alphabet (Google) | Mandiant |
| Deloitte | Makros |
| Deloitte | Hacktive |
| IBM | Octo |
| KPMG | Fortica |
| NCC Group | Adelard |
| Protiviti | R2integrated (R2i) |
| PwC | Sagence |
| Kroll | Crisp |
| Kroll | Resolver |
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