IDC MarketScape

IDC MarketScape: Worldwide Cybersecurity Governance, Risk, and Compliance Consulting Services 2025–2026 Vendor Assessment

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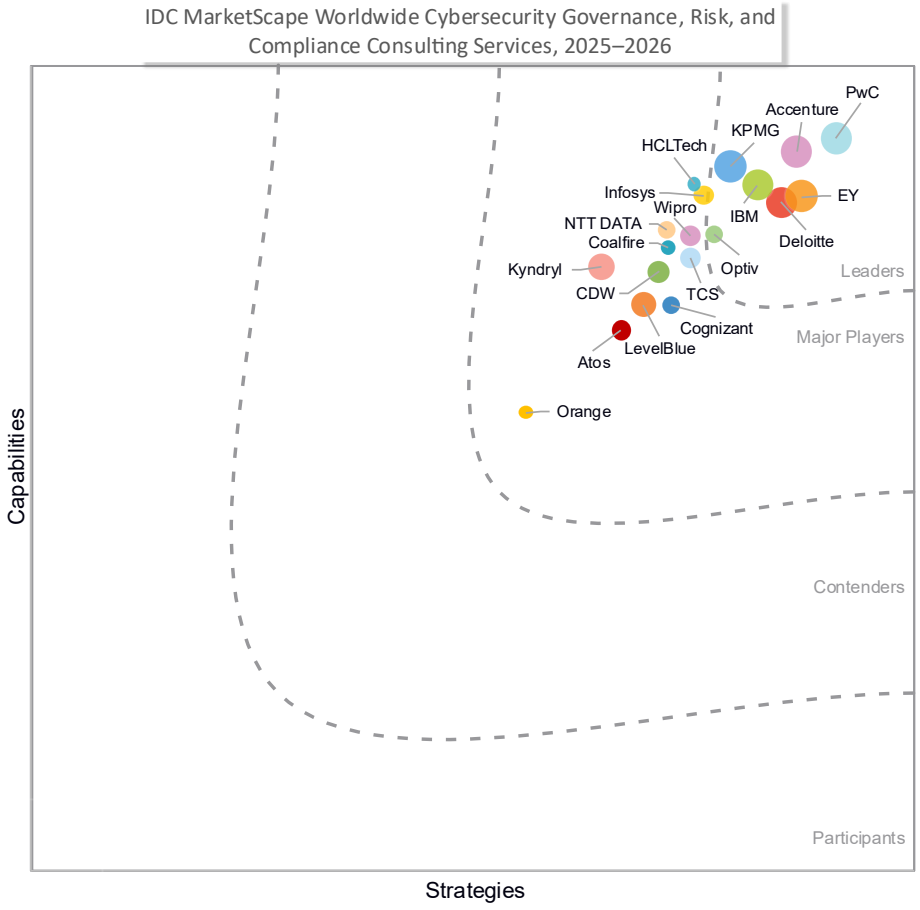
THIS EXCERPT FEATURES PWC AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Cybersecurity Governance, Risk, and Compliance Consulting Services Vendor Assessment



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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Cybersecurity Governance, Risk, and Compliance Consulting Services 2025–2026 Vendor Assessment (Doc # US53936925).

IDC OPINION

Cybersecurity risk and compliance leaders must often resolve a myriad of known issues, such as bad audits, breaches, increased quantity and sophistication of cyberattacks, and well-meaning but often erroneous guidance from the board or senior management. Equally bad is the problem of not knowing what you do not know. A qualified cybersecurity governance, risk, and compliance (GRC) service provider can be instrumental in helping an organization identify the source of problems or challenges, define it in meaningful terms that align with the business and overall corporate needs, and establish a plan of action in the form of a road map to address it.

A cybersecurity GRC program enables a strategic approach to understanding the risk profile of an organization and managing risk and compliance effectively. It helps organizations:

- Conduct ongoing risk modeling exercises with management, both business and operational, to identify relevant threats to the organization and associated risks (known as the risk profile)
- Establish cybersecurity policies that effectively address the risk profile of the organization
- Prioritize and manage threats associated with the risk profile through policies
- Establish a blueprint and road map to identify and implement staffing, processes, and technical solutions that contribute to overall risk and compliance management
- Conduct risk assessment to ferret out hidden or unknown risks and conduct compliance assessments that ensure compliance with cybersecurity policies, regulations, industry standards, and cybersecurity frameworks

Cybersecurity GRC programs are primarily created to ensure that businesses can address critical threats in a timely manner. These programs also enable organizations to identify, categorize, prioritize, and mitigate risks and compliance issues specific to their business as well as to eliminate or reduce the risk of cyberattack threats based on their potential impact. These steps, if performed consistently and effectively, significantly increase the resilience of the business.

A cybersecurity GRC program can:

- Aid in developing effective cybersecurity policies and procedures
- Create executive, managerial, and operational reports that directly reflect the state of risk and compliance for the organization
- Assist decision-makers in identifying and tracking threats and exposures associated with people, process, and technology on a day-to-day operational level
- Assist the business with establishing the likelihood and potential impact of any cyberattack
- Assist the business with evaluating and prioritizing financial impacts and ensure money, time, and resources are expended in the right places
- Assist in preventing or reducing the impact of risks identified in assessments
- By infusing AI within GRC tools, an organization can enhance both productivity and outcomes, thereby increasing the ROI of the overall GRC program.

Organizations that lack adequate cybersecurity and corporate policies and visibility into cybersecurity risks and compliance issues within their IT estates are potentially unprepared; any type of attack could cause damage, disruption, and unauthorized access, which all impact reputation, brand, confidence from the board of directors as well as customers, and data. Implementing a cybersecurity GRC program will empower an organization to establish adequate cybersecurity and corporate policies. It also helps the business discover, anticipate, balance, monitor/track, and mitigate risks and compliance issues. Cybersecurity GRC service providers can be a catalyst for many organizations to begin the journey of creating and/or elevating such a program.

Before engaging with a cybersecurity GRC service provider, organizations should first determine their needs. For instance, decision-makers should consider the following questions:

- Do I need help documenting the right set of cybersecurity policies?
- Are these cybersecurity policies based upon a published cybersecurity framework?
- Do I need help to review my corporate policies to ensure these reflect all regulatory requirements my company is subject to?
- Is my organization compliant with all relevant cybersecurity regulations across various regions, countries, states, and/or provinces?
- Are there any other types of corporate requirements that must be applied to these policies?
- Do I want to build and run this program myself? Do I want a service provider to build the program and then I run it?

- Do I want a service provider to build and run the cybersecurity GRC program for me?
- Do I need as much automation as possible — is machine learning (ML), artificial intelligence (AI), and workflow management critical to my success?

Whether you are a cybersecurity GRC service provider that engages with organizations to create and implement a program or are hired to manage and execute it, utilizing a sound framework will be necessary to achieve a clear picture of cybersecurity risks and what is needed to remediate them. The benefits of establishing a cybersecurity GRC program include:

- Enabling an organization to constantly review, update, and approve policies
- Enabling effective strategic planning
- Increasing knowledge and understanding of exposure to risk and emphasizing that unacceptable risks are identified and addressed properly
- Enabling the CISO to paint a picture in business terms that will empower both the board of directors and the C-suite to make risk decisions regarding acceptance, avoidance, or mitigation
- Helping ensure that money and effort are not wasted on risks that are not significant
- Providing senior management with visibility into the organizational risk profile and risk treatment priorities to support their ability to make strategic decisions
- Reducing risks of litigation because of inadequate controls, processes, and contingency plans
- Establishing a systematic, well-informed, and thorough method of decision-making
- Reducing disruptions and avoiding rework by ensuring all staff have a better understanding of the process
- Setting the scene for continual risk reduction and security posture improvement within the organization
- Increasing business resilience against disruption and/or cyberattack that can impact revenue generation

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Using the IDC MarketScape model, IDC studied vendors that provide cybersecurity GRC services worldwide. The vendors included in the study had to meet certain criteria to qualify for this vendor assessment:

- **Geographic presence.** Each vendor is required to operate GRC services in more than one region.
- **Sales presence.** Each vendor has a sales force across one or more regions.

- **Customer base.** Each vendor has more than 100 customers.
- **GRC service capability.** Each vendor offers a GRC service that has trained professional cybersecurity staff with expertise in cybersecurity risk management.

ADVICE FOR TECHNOLOGY BUYERS

Technology buyers should consider several factors when looking at cybersecurity GRC services, but they must first answer some key questions: Do I want to build and run this service myself? Do I want a service provider to build the service and then I run it? Or do I want a service provider to build and run the cybersecurity GRC service?

After choosing their preferred approach, they can consider the following for choosing a service provider:

- Understand the service provider's distinctive service capabilities. For instance, consider the number of years it has been performing such work as well as the customers you can speak with for testimonials.
- Determine whether the service provider is interested in understanding the problem to solve and working with you to refine it or it is just giving you a rundown of its services in the hope that you will just buy.
- Understand the differences in services between service providers in the field. Identify what they really bring to the table.
- Determine if the service provider has demonstrable knowledge and skill in the particular area of competence.
- Get clarity on the limits of the service provider's knowledge and skill in this area.
- Determine if the service provider's reach enables it to consistently address your needs on a global scale.
- Identify use cases that the service provider has addressed based on its successful projects. If the service provider is willing, have them describe instances where a project did not result in complete satisfaction.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

PwC

PricewaterhouseCoopers (PwC) is positioned in the Leaders category in the 2025–2026 IDC MarketScape for worldwide cybersecurity governance, risk, and compliance consulting services.

PwC is a global professional services network with presence in over 150 countries and a broad portfolio spanning audit, tax, consulting, and risk advisory work. Within its cybersecurity and risk services, PwC combines its consulting heritage and global delivery capability to help organizations with GRC challenges across enterprise scale, digital transformation, and regulatory change. Leveraging deep industry expertise and a strong brand reputation, PwC is well positioned to support large-scale, AI-enabled initiatives where cyber-governance and regulatory obligations are tightly linked to business performance and stakeholder trust. This work is backed by centers of excellence and platform accelerators, so PwC's strategy is to build and run on the technologies that clients already use.

In the cybersecurity GRC marketplace, PwC differentiates by positioning governance, risk, and compliance not simply as a regulatory or audit exercise, but as a strategic business discipline. PwC's cybersecurity and regulatory services emphasize linking cyber risk and compliance to business strategy and decision-making — helping clients align cybersecurity programs, risk appetite, and oversight frameworks with enterprise objectives. PwC's message consistently frames GRC as moving from reactive, checkbox activities toward proactive, AI-enabled, and board- and C-suite-driven functions that drive resilience, transparency, and better decision-making.

Beyond strategic framing, PwC's differentiation lies in its AI-enabled IRM and managed services model, which supports the full life cycle of GRC from strategy to build to run. PwC helps clients design and deploy integrated risk-and-compliance platforms, unify data and analytics across risk functions, automate controls and monitoring, and embed governance processes into operations. Where ongoing support is needed, PwC supports managed services for GRC — such as issues and exceptions management, control testing and monitoring, third-party risk intake/remediation, privacy program operations, and regulatory reporting — enabling clients to shift from managing discrete tasks to managing outcomes and risk-adjusted business performance.

Finally, PwC's value proposition in cybersecurity GRC is strengthened by its global scale, industry-vertical expertise, and multidisciplinary approach that spans strategic advisory to AI-enabled operational execution. Across sectors such as financial services, insurance, pharma life sciences, healthcare, consumer markets, industrial products, energy, technology, and media and telecom, PwC's teams combine regulatory understanding, cyber-risk insight, and business transformation experience to support governance frameworks, risk quantification, and compliance workflows. For organizations seeking a partner that can elevate GRC from a cost center into a value-driving, business-aligned capability — integrated with a

cybersecurity strategy, technology platforms, and operations — PwC offers a differentiated and compelling option in the cybersecurity GRC marketplace.

Strengths

- **Assurance-grade rigor:** PwC brings controls, testing, and disclosure discipline, where evidence holds up against external scrutiny. This elevates credibility with stakeholders.
- **IA/SOX/TPRM harmonization:** Siloed functions are integrated under common frameworks that decrease duplicative effort while improving coverage. This reduces the total cost of control.
- **Global coordination.** A large network manages consistency and local nuance. Programs remain coherent across languages and regulators, which is essential for multinationals.

Challenges

- **Cost and program complexity:** PwC's engagements often involve large teams, extensive global networks, and premium cost models. Clients with limited budgets or shorter timelines may find its pace slower and cost higher than anticipated.
- **Differentiating in a crowded market:** While PwC is a trusted brand, the number of firms offering GRC services means that differentiation must be clear. Clients may perceive PwC's offerings as similar to other consultancies. Staying distinct and compelling in its value proposition remains a challenge.

Consider PwC When

- **Deep regulatory, audit, and assurance expertise:** PwC's heritage in risk, controls, and assurance gives clients access to proven methodologies and regulator-trusted frameworks. This expertise helps organizations design GRC programs that are audit ready and aligned with global compliance expectations.
- **Integrated approach across risk, compliance, and ESG:** PwC can integrate financial, operational, and nonfinancial (ESG) risk management within a unified governance model. This holistic view reduces duplication, strengthens oversight, and improves the quality of enterprise reporting.
- **Global reach with consistent delivery:** PwC's extensive international network enables consistent methodologies and support across multiple jurisdictions. Multinational clients benefit from standardized controls, coordinated assurance, and local regulatory insight in every region of operation.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here, and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

According to the OCEG, "governance, risk, and compliance (GRC) is the integrated collection of capabilities that enable an organization to reliably achieve (business) objectives (governance) while addressing uncertainty (risk management) and acting with integrity (compliance). It encompasses governance, assurance, and management of performance, risk, and compliance."

IDC's governance, risk, and compliance market relates to this definition. GRC includes both services and software that assist organizations with tasks and initiatives to:

- Enhance performance, create greater efficiencies, and reduce risk
- Establish and monitor enterprise and IT governance, programs that address several types of risk management and mitigation, and compliance with global laws and regulations, industry standards, and company policies
- Aggregate the tools required to help an enterprise identify, track, and analyze enterprise, business, and technology risks and monitor and manage corporate and IT governance and compliance

As organizations handle, collect, analyze, or share personal data, they increasingly become aware of challenges involving the privacy and security of that data. Services that help organizations secure the privacy of data, address the threat of cyberattacks, and deal with the growing number of privacy-focused regulations are imperative. Technology suppliers and service providers have a unique visibility as well as trust with enterprise clients to develop collaboration across departments and roles. This collaboration ensures risk and compliance efforts are focused on common enterprise goals, provide a common language as a baseline for communicating these goals, and minimize redundant work efforts.

The security governance, risk, and compliance market is a functional market within IDC's broader software taxonomy and includes the following segments:

- **Governance.** Corporate governance management applications support corporate board members, C-suite executive teams, and second-line-of-defense professionals in defining and implementing corporate policies. This segment includes applications for policy management and compliance management.
- **Risk management.** Risk management applications assist in identifying, analyzing, monitoring, and managing all types of risks threatening an organization, including IT risk, compliance risk, security risk, and third-party risk.
- **Compliance.** Compliance management encompasses adhering to all necessary regulatory and legal requirements, as well as managing any changes to the regulatory environment and its impact on the enterprise. This segment includes regulatory compliance management and regulatory change management.
- **Audit and regulatory management.** Audit management solutions help organizations plan, manage, and analyze processes (both manual and automated). Numerous types of audits must be managed within an organization, including compliance audits, IT audits, security audits, and third-party audits.

- **Business resiliency/continuity/recovery.** Business resiliency/continuity/recovery solutions identify exposure to internal and external threats. This also enables organizations to quickly adapt to disruptions while maintaining continuous business operations and safeguarding people, assets, and overall brand equity. They effectively deal with disruptive and unexpected events that threaten to harm the organization or its stakeholders. These solutions establish capabilities to enable the recovery or continuation of vital technology infrastructure and systems following a natural or human-induced disaster.
- **Third-party risk management.** TPRM services are designed to help organizations identify, assess, mitigate, and monitor risks associated with third-party engagements and/or acquisitions. These services span advisory and consulting to fully outsourced managed services, offering scalable solutions tailored to the complexity and maturity of an organization's cybersecurity risk posture and cybersecurity compliance needs.

The worldwide GRC market is made up of professional security services (PSS), which include consulting and integration security services; software, software as a service (SaaS), and managed security services (MSS), consisting of legacy customer premises equipment (CPE), traditional hosted, cloud hosted, or as a service; and education and deployment. The sections that follow include a breakdown of these categories.

Professional Services

Professional services include consulting, design, implementation, and engineering services to support the creation and implementation of GRC programs and software solutions. In addition, advisory services consist of executive guidance: strategy, road maps, mentorship, board training, virtual executive services, and program management.

Managed Services

This category includes services that establish responsibilities, processes, practices, methodologies, and tools to create the cyber-risk vision and strategy. These services involve:

- Risk definition and appetite, plans, road map, and budget
- Policies and procedures required to comply with relevant cybersecurity and privacy laws, policies, rules, and regulations
- Metrics that show risk and compliance posture, residual risks, financial impacts, and ROI
- Due diligence activities and assessments to identify, assess (qualitative, quantitative, and maturity), categorize, catalog, test, and monitor aspects of the enterprise related to risk, compliance, privacy, third parties, and supply chain, as well as audit readiness

- Activities on selecting, implementing, integrating, migrating, managing, operating, and maintaining solutions that provide automation, orchestration, machine learning, and AI

Education and Deployment

This category includes skill and awareness training and education, program and solution deployment, and configuration services. GRC providers often incorporate these services into the overall solution. Skill training can cover various areas of GRC, such as governance management, risk management, and compliance management, and is typically designed for staff who perform these functions. Awareness training is designed to raise awareness among all employees of their responsibilities for GRC.

LEARN MORE

Related Research

- *Worldwide Security Governance, Risk, and Compliance Services and Software Forecast, 2025–2029* (IDC #US53611425, June 2025)
- *Worldwide Security Governance, Risk, and Compliance Services Forecast, 2025–2029* (IDC #US53611525, June 2025)
- *IDC's Worldwide Security Services Taxonomy, 2025* (IDC #US53294625, April 2025)
- *Cybersecurity Metrics – A Data-Driven Framework for the Future* (IDC #US52699424, November 2024)
- *Continuous Compliance Management Increases Resilience to Cyberattack* (IDC #US52638324, October 2024)
- *Choosing the Right Security Framework* (IDC #US49291622, July 2022)

Synopsis

This IDC study explores the services underpinnings required to enable a successful and fully implemented cybersecurity GRC program that can be managed either by the end customer or by the service provider that built it. This study also raises questions that buyers and vendors in this space can use as a guide to make informed decisions and achieve desired outcomes. The discipline and design of cybersecurity GRC services can provide a framework for orienting organizations from optimizing standard checkbox outcomes to optimizing a value-added program that effectively manages cybersecurity risks. This framework should also provide a prescriptive life-cycle approach that drives commitment and support from senior executives, board members, and various stakeholders in between.

"A well-defined cybersecurity GRC program is critical in today's ever-changing and growing threat landscape," said Phil Harris, research director, IDC's GRC Services and

Software program. "Attackers are in the business for the long haul, extracting as much valuable data or intelligence while undetected to reap as many benefits as possible. A practical and pragmatic way to combat this is to adopt an ongoing methodical approach to assessing the depth and breadth of cybersecurity controls and the maturity to cull new or not-so-obvious vulnerabilities and exposures that attackers exploit. This is an ongoing race, and organizations with strong cybersecurity GRC programs will be better prepared to withstand evolving attacks."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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