cloud titans

Discovery → Security → SOC for the Microsoft-centric Enterprise

4–6 weeks
Discovery sprint

MSS / 24×7 SOC
Microsoft-first

DORA / NIS2-aligned
EU & Middle East

IHR Insights: Cloud Titans – Challenger Vendor Profile

Discovery → Security → SOC: ROI-led Microsoft defense for EU/UK & Middle East mid-market

About this report

This report distils the Cloud Titans proposition into a clear, decision-ready view for executives and investors. It combines a SCOT analysis (strengths, challenges, opportunities, threats) with an evidence-based Product–Market Fit read, a UK/EU (DACH/Poland) and Middle East market outlook, and a head-to-head competitive heat map across cloud advisory, app-usage discovery, Microsoft security managed services, 24×7 SOC, governance/compliance, and analytics.

We also include an investor take on the revenue model and unit economics (discovery sprints → managed security MRR → SOC expansion), an adoption verdict on what it will take to "cross the chasm" (references, credentials, repeatable runbooks), and a pragmatic buyer-side caution checklist mapped to Cloud Titans' license prerequisites, data handling C sovereignty, SLAs/MTTA-MTTR targets, and partner delivery assurances.

The aim: help you validate scope vs. timeline, quantify value creation (license rationalization → savings C reinvestment; E5 security activation → policy coverage C MTTR gains), and de-risk compliance and operations (DORA/NIS2 alignment, data ownership, incident workflows)—so you can make a confident go/no-go and negotiate the right acceptance criteria, pricing exhibits, and support terms.

Introduction Market Context

Cloud Titans enters a crowded but opportunity-rich arena with a pragmatic "discover → secure → operate" storyline: short, outcomes-driven discovery sprints (AppNavi) to expose shadow IT and shelfware, then tiered Microsoft-first managed security and a 24×7 SOC (Hunters) to harden the estate and sustain value.

The timing is favourable. Across the UK/EU mid-market and lower enterprise, CIO/CISOs are reallocating budgets from one-off projects to recurring assurance as regulatory pressure (DORA/NIS2), rising SaaS sprawl, and board-level demands for measurable risk reduction converge. Buyers with under-utilized E3/E5 licenses want proof that spend converts into policy baselines, faster MTTA/MTTR, and fewer incidents—not more tooling.

At the same time, digital-adoption programs are shifting from pilots to platform plays, making telemetry-led rationalization an easy on-ramp for security and cost outcomes. Incumbent GSIs still win on brand and audit depth, while local boutiques hold relationships; the open space sits with challengers who can mobilize quickly, publish clear runbooks and SLAs, and package advisory with managed services.

Executive Snapshot - Cloud Titans

Cloud Titans is a newly formed, Microsoft-first challenger that packages Advisory → Discovery → Managed Security/SOC into a fast-mobilizing, partner-enabled service stack. The snapshot below distils what matters at a glance: the three-pillar proposition and delivery model, the founders' execution pedigree, a clearly tiered security catalogue mapped to Microsoft license prerequisites and SLAs, the telemetry-led discovery motion that funds itself via rationalization in 4–6 weeks, and current geographic coverage.

Read this as a quick credibility and fit check before diving into PMF, references, and the operating playbook.

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COMPANY AT A GLANCE

- **Founded:** 2024 (UK); Poland entity planned. Status: early stage; no bookings declared at time of writing.
- **Offers:**
    - What they do: 3 pillars — Advisory, Discovery (AppNavi-powered), and Managed Security / 24×7 SOC (Hunters-powered). They claim a +1,600-consultant partner network, with mobilization in 3–5 days for internal/external talent pools.
    - Leadership narrative: Founder experience spans Airtel's SharePoint modernization, Di Pocket's PCI→DORA/NIS2 uplift, and SoftwareOne's post-merger GTM (G18 hunting). Company itself is new (UK April 2024; Poland entity planned) and reports no bookings yet.
    - Security catalogue: Tiered M365 Defender services, SOC with Hunters SIEM, clear license prerequisites (E3/E5 add-ons, Entra ID P1/P2) and defined incident/SLA rhythms.
    - Discovery value prop: AppNavi telemetry to expose shadow IT, low usage and rationalization candidates; 4–6-week outcomes driving cost take-out / re-investment.
- **Coverage:** DACH/UK/Nordics/Middle East via named ambassadors; +1,600 consultant partner access.

Why this matters now: EU DORA C NIS2 raise the bar for operational resilience and monitoring. Buyers with E3/E5 estates want measurable value from Microsoft security and rapid ROI from software rationalization. Cloud Titans packages both into a land-and-expand motion.

SCOT ANALYSIS

Strengths

- **Senior operator DNA** with credible programs executed by founders (Airtel; SoftwareOne integration; financial-sector controls at DiPocket).
- **Fast mobilization** and **broad tech bench** (internal C external matrices; multi-stack: Azure/AWS/GCP, SAP, Dynamics, AI/ML).
- **Tightly packaged offers**: Discovery (AppNavi) and Microsoft-first Managed Security (Entra/Defender) with a clear tiering C license map; attachable 24×7 SOC (Hunters).
- **Regional coverage** with named ambassadors in key buyer markets (DACH/UK/Nordics/ME).

Challenges

- **No bookings / new brand** → reference ability C risk checks will be buyer objections #1.
- **High partner reliance** (AppNavi, Hunters, Clouds On Mars, LithyTree, etc.) → margin control C delivery assurance must be proven.
- **Crowded categories** (MSS/MDR, SIEM/SOC, cloud advisory, DAP) with incumbent trust and certifications.

Opportunities

- **Regulatory catalysts**: DORA applies from 17 Jan 2025 to EU financials; NIS2 transposed from 17 Oct 2024—both force uplift in governance, monitoring, and incident readiness.
- **Market tailwinds**:
    - Managed Security Services 2025 est. $39–40B; projected low-double-digit CAGR to 2030.
    - SIEM ≈ $10.8B in 2025, ~12% CAGR to 2030.
    - Digital Adoption Platforms ~$1.9B in 2025, fast growth into the 2030s.
    - Microsoft-centric buyers with E3/E5 estates seeking rationalized security and measurable ROI from licenses (Defender/E5 Security).

Threats

- Global GSIs/Big 4 expanding MSS C cloud security; hyperscaler PS; local boutiques with entrenched logos in DACH/PL; and pure-play MSSPs (SOC-led). The Cloud Titans pack itself lists several regional competitors.

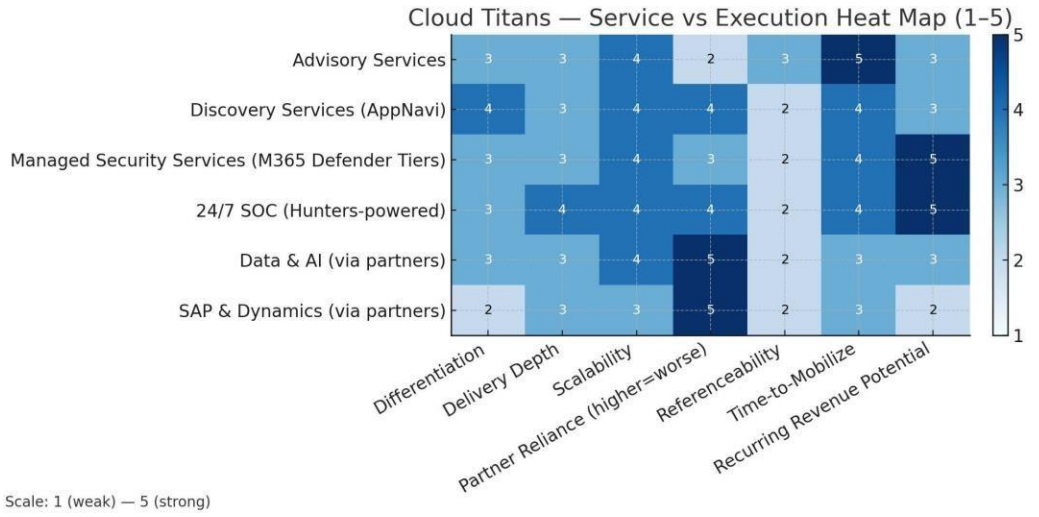
Product–Market Fit (by offer)

Offer	Pain it solves	Fit today	Critical proof needed
Discovery (AppNavi)	Shadow IT, shelfware, low adoption; need quantified rationalization in 4–6 weeks	Strong for cost-pressured CIO/CFO teams; aligns to DAP growth	2–3 anonymized quick-wins showing %license reduction, re-investment funnel, and compliance uplift.
M365 Managed Security (Tiered)	Under-used E3/E5 security; inconsistent policies; rising phishing/endpoint risk	High in 500–5,000 seat enterprises on Microsoft	SOC runbooks, MTTA/MTTR, before/after risk metrics, incident case studies.
24×7 SOC (Hunters)	Signal overload; alert fatigue; lack of correlation/content	Good for orgs wanting SIEM value fast with modern analytics	Prove time-to-detect, false-positive reduction, and integration breadth; 90-day outcomes.
Senior Advisory	Strategy/controls gaps; regulatory uplift	Good wedge into DORA/NIS2 programs	Publish a controls framework C audit-ready artifact (policy sets, playbooks).

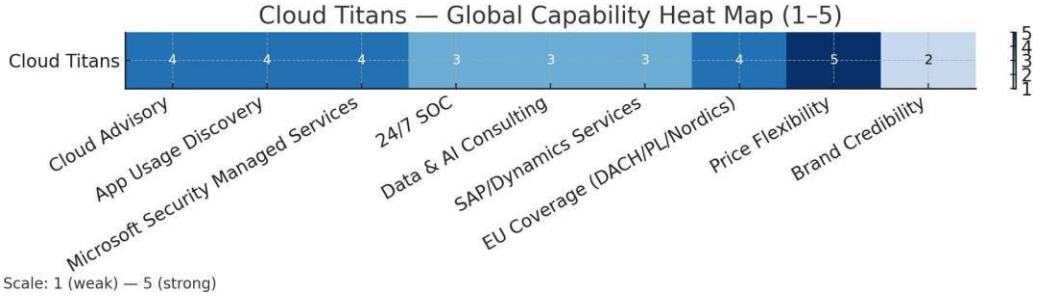
COMPETITORS HOW CLOUD TITANS STACKS UP

The competitive field spans four archetypes: **local boutiques** with entrenched relationships in Poland/DACH, **Big 4/GSIs** with audit-grade assurance and vast benches, **MSSP pure-plays** optimized for SOC execution and certifications, and **DAP vendors** whose platforms drive telemetry and adoption. Against this backdrop, Cloud Titans' edge is a packaged **Discovery → MSS → 24×7 SOC** motion that lands with measurable value and expands into recurring security outcomes. It should out-agile GSIs on price/speed, out-package boutiques with managed services, and out-scope DAPs by pairing telemetry with advisory and run. The trade-offs: Titans must close gaps in **brand/assurance** versus GSIs and **SOC maturity** versus pure-play MSSPs—making references, credentials, and documented runbooks the critical equalizers.

Regional boutiques (Poland C DACH) listed in the pack — e.g., Cloudity, IT-Dev, Cloud Partners, SecuRing, AI Busters, Cloudwürdig, Cloudwerkstatt, Codecentric (small-projects), CloudMounter, AI4BD. These players anchor cloud advisory, security audits, and data/AI for SMEs.



Opinions & Methodology. Capability scores, heat maps, and competitive characterizations are opinions based on our methodology, assumptions, and vendor/public materials as of September 2025; they are directional, not statements of fact, and not a substitute for buyer testing or RFPs. Vendors may submit factual corrections with evidence at the contact listed herein.



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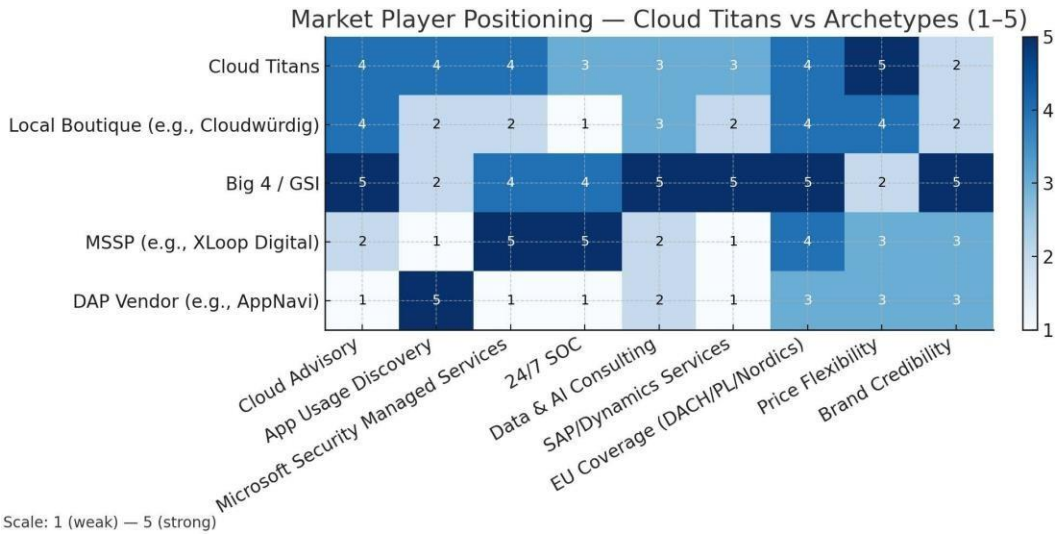

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Archetype comparison (summary)

- **Versus Local Boutiques:** Cloud Titans brings packaged MSS/SOC and a broad partner bench; boutiques often win on incumbency and narrow expertise.
- **Versus Big 4/GSIs:** Cloud Titans can beat on price/agility and E5-centric packaging, but will trail in assurance, brand, and bench depth.
- **Versus MSSP pure plays:** Cloud Titans' edge is advisory + discovery landing motion; MSSPs outgun on SOC maturity C certifications.
- **Versus DAP vendors:** Cloud Titans' advisory + DAP-driven rationalization story is broader; DAPs win on platform depth.

WHAT'S DIFFERENT

- **Discovery → Security flywheel:** 4–6-week discovery establishes ROI C compliance angles; security tiering and SOC attach produce recurring value.
- **Microsoft-first packaging:** Clear Entra/Defender license maps and SOC handoffs, easier stakeholder buy-in.

BUYER BENEFITS

- **Fast time-to-value**: quantified license optimization and security baselines within a quarter.
- **Single throat to choke** across advisory, discovery, and run services.

CAUTIONS

1) New-vendor maturity references

Cloud Titans is a new entity (UK Apr-2024; Poland planned) and reports no bookings yet. Require 2–3 like-for-like references (Discovery, MSS, SOC), sample artifacts (runbooks, reports), and named delivery leads before award.

Ask for: client references, anonymized deliverables (policy baselines, detection packs), CVs of named leads, and a 90-day success plan.

2) Partner-reliant delivery (subcontractors, flow-downs)

The model leans on a partner network (+1,600 consultants) and named technology/services partners (e.g., AppNavi for discovery; Hunters for SIEM/SOC; Clouds On Mars for data/AI; LithyTree for SAP/Dynamics; XLoop Digital for 24/7 SOC). Ensure prime-contractor accountability, subcontractor approval rights, and flow-down of SLAs, security, and DPAs.

Ask for: list of named subs, their roles, certifications, data-processing agreements, right to replace/approve subs, and continuity plans if a partner exits.

3) Microsoft licensing prerequisites scope clarity

Security tiers and SOC services have explicit license requirements (e.g., Entra ID P1/P2, M365 E3/E5 and E5 Security add-on). Validate you already own (or budget for) the prerequisites, and ensure the SoW maps which features are included per tier to avoid scope gaps.

Ask for: a license matrix tied to your tenant; confirmation of no upsell dependency mid-term; change-management path if your license posture changes.

4) SOC architecture, data handling SIEM costs

SOC is Hunters SIEM–powered with 24/7 monitoring and monthly status reports. Clarify data residency, log sources, ingestion/retention costs, content ownership (detections, playbooks), and onboarding timeline. Ensure incident handoffs and MTTA/MTTR targets are explicit.

Ask for: architecture diagram (data flows), retention policy, content IP terms, onboarding plan (days), and reporting pack samples.

5) SLAs, KPIs service credits

Documents reference incident rhythms and monthly reporting; lock down numerical SLAs (e.g., MTTA/MTTR by severity), measurement method, and service credits for misses. Include an exit-for-cause clause tied to sustained under-performance.

Ask for: SLA schedule, measurement tooling, governance calendar (QBRs), and remediation plan template.

6) Discovery data privacy (GDPR, DPIA, consent)

Discovery is AppNavi-powered and positioned as GDPR-compliant, collecting browser/app usage to identify shadow IT, low usage, and rationalization targets in 4–6 weeks. Confirm DPIA outcomes, lawful basis, data minimization, pseudonymization/anonymization, and consent flows for end-users.

Ask for: DPIA, data schema, retention C access controls, and the exact fields captured (incl. any PII).

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7) Geography, staffing mobilization reality

They cite ambassadors across DACH/UK/Nordics/Middle East and show a mobilization flow with 14-day "mobility period". Validate actual delivery team locations, language coverage, and on-call rotation. Require right-to-review named CVs before mobilization.

Ask for: staffing plan by workstream, language/country coverage, background checks, and substitution policy.

8) Runbooks, content acceptance criteria

Packaged services reference policy baselines, Intune/Defender configurations, and SOC operations. Insist on documented runbooks, versioning, and acceptance tests per deliverable (e.g., policy coverage %, high-severity detection test pass).

Ask for: deliverable checklist, test cases, and sign-off criteria tied to invoice milestones.

G) Commercial terms (TsM vs Managed Service; renewals)

Security tiers denote MS (Managed Service) vs TCM. Protect renewals (price-cap, CPI linkage), onboarding fee vs monthly split, and pro-rata ramp-down. Add co-termination and a fair termination-for-convenience window.

Ask for: rate card by role/tier, indexation rules, discount guardrails, and transition-out assistance priced up front.

10) Regulatory alignment (DORA/NIS2)

If you're EU-regulated, require mapping of services to operational-resilience controls and incident reporting duties. Ensure tabletop exercises and evidence packs meet auditor/regulator expectations (policy, logs, trails).

Ask for: control-to-regulation matrix, evidence templates, and regulator-grade reporting examples.

11) Tooling lock-in reversibility

Define data export for AppNavi telemetry and Hunters content (detections, dashboards), IP ownership of bespoke content, and transition-out SLAs at contract end.

Ask for: export formats, fee caps for transition, and license to use detection content post-contract.

12) Insurance, liability breach handling

Set minimum insurance levels (PII/cyber), define liability caps with carve-outs (e.g., data protection breaches), and require breach notification timelines and regulator support. *(General buyer safeguard—tie to your internal standards.)*

Ask for: insurance certificates, breach playbook, and named contacts for regulator interactions.

13) Performance reporting cadence

They promise monthly status and a metrics/KPI framework. Lock in QBRs, ad-hoc escalation paths, and board-ready reporting packs (trendlines, risk register).

Ask for: sample reports, KPI definitions, and how MTTA/MTTR are calculated (clock start/stop).

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14) Change control scope drift

SOCs expand over time (new log sources, use cases). Mandate a change-control board, pre-priced unit costs for additional sources/use-cases, and hard out-of-scope definitions.

Ask for: rate card for new integrations/use cases, lead times, and acceptance tests for added scope.

PRICING PACKAGING (INDICATIVE)

- **Discovery Sprint:** fixed fee (4–6 weeks) + rationalization roadmap.
- **MSS:** tiered MS with license prerequisites; per-user or per-tenant.
- **SOC:** monthly + onboarding, outcome KPIs (MTTA/MTTR).

IDEAL BUYERS

- **FSI / manufacturing** orgs with E3/E5, <5k seats, DORA/NIS2 timelines.

ANALYST POV (IHR INSIGHTS)

Cloud Titans is an execution-focused challenger packaging well-chosen partners (AppNavi, Hunters) into a pragmatic cost-reduction + risk-reduction story. The firm must rapidly accumulate references, lock in Microsoft credentials, and publish SOC outcomes to scale. If they do, we expect competitive win-rates in mid-market EU accounts where GSIs feel "too big" and boutiques lack 24×7 security depth.

IHR Verdict: *Promising early mover for Microsoft-centric DORA/NIS2 programs; shortlist for 500–5,000-seat EU enterprises seeking quick ROI and a unified Discovery → Security motion.*

CONFIDENCE TRIGGERS (UP / DOWN)

Confidence ↑ (bullish if observed in next 90–120 days)

- References: 3–5 live customer references split across Discovery, MSS, and 24×7 SOC, each with quantified outcomes (e.g., ≥15% license rationalization, MTTA ≤15 min / MTTR ≤4 hrs by severity).
- Credentials C assurance: Microsoft Solution Partner for Security (or equivalent badges), ISO 27001 plan in motion, SOC 2 Type I underway; published runbooks C acceptance tests.
- Conversion funnel health: ≥40–50% Discovery → MSS conversion and ≥30% MSS→SOC attach in target ICPs; 3× forward pipeline coverage against next-two-quarter bookings.
- Delivery reliability: On-time onboarding (≤30 days), QBR cadence met, service credits near zero; false-positive rate trending down month over month.
- Regulatory wins: 1–2 DORA/NIS2 programs signed with auditor-grade evidence packs delivered.
- Unit economics: Gross margin on MSS/SOC ≥45–55% with subcontractor mix ≤30% of delivery hours; DSO ≤45 days.
- Team scale C stability: Named leads backed by a bench; voluntary attrition in delivery <12% annualized.

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Confidence ↓ (bearish if observed)

- Reference gaps / slips: Still 0–1 verifiable reference after two quarters; missed go-lives or scope rework on first logos.
- Partner fragility: Loss of a key partner (e.g., SIEM/DAP) or SLA/SLO breaches not flowed down to subs; unclear IP/exit terms for content and data.
- License mismatch: Repeated delays due to E3/E5/Entra prerequisite gaps; upsell surprises mid-contract.
- SOC maturity signals: MTTA/MTTR not published or worsening, onboarding >45 days, limited detection content beyond vendor defaults.
- Commercial stress: Margin <35% on managed services, heavy TCM dependence, renewals pushed or discounted >20% to retain accounts.
- Governance misses: Skipped QBRs, weak monthly reporting, or gaps in DPIA/data-sovereignty documentation for Discovery workloads.
- Talent risk: Over-reliance on a few contractors; inability to staff multilingual DACH/PL workstreams inside SLA.

Baseline view: Constructive/Watch — tilt up with proofs on references, credentials, and funnel conversion; tilt down if partner reliance isn't governed by hard SLAs/DPAs or if SOC metrics stagnate.

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