



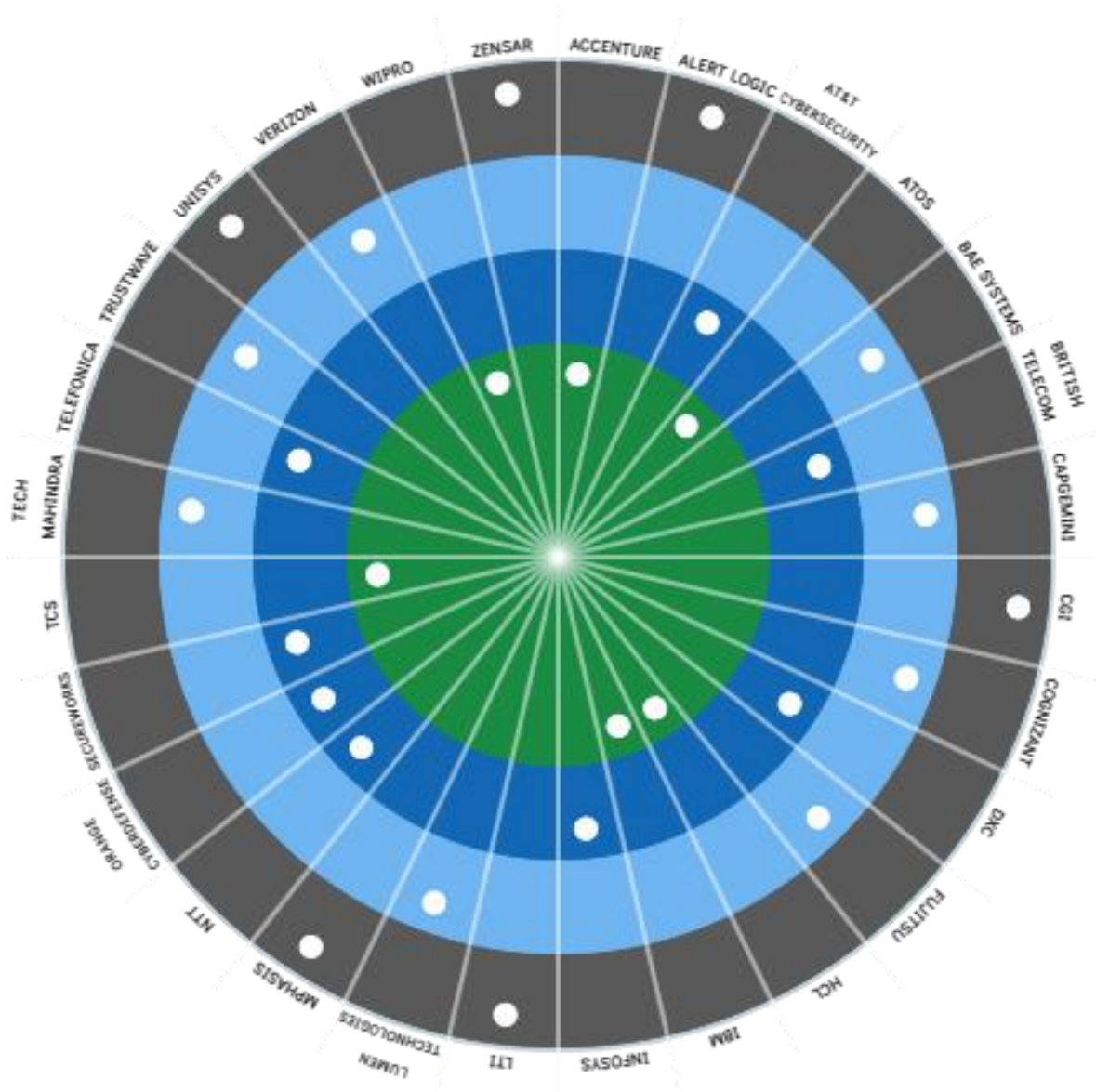
Cybersecurity Services 2021 RadarView™

Service Provider Profile

March 2021



Avasant has recognized 28 top-tier providers supporting enterprise cybersecurity



LEADERS

Accenture	Atos
HCL	IBM
TCS	Wipro

INNOVATORS

AT&T Cybersecurity	British Telecom
DXC	Infosys
NTT	Orange Cyberdefense
Secureworks	Telefonica

DISRUPTORS

BAE Systems	Capgemini
Cognizant	Fujitsu
Lumen Technologies	Tech Mahindra
Trustwave	Verizon

CHALLENGERS

Alert Logic	CGI
LTI	Mphasis
Unisys	Zensar

HCL: RadarView profile

HCL



Practice maturity ★★★★★

Partnership ecosystem ★★★★★

Investments & innovation ★★★★★

Build upon new practices: Data security and data privacy and Security of Things. Increased focus on OT security and cloud security.

Practice overview		Client case studies	
<ul style="list-style-type: none"> Practice size: 4500+ Certified/Trained resources : 4400+ Active clients: 450+ Delivery highlights: Six cyber security fusion centers (CSFCs) 		<ul style="list-style-type: none"> Implemented the CSFC Fusion Platform to enhance detection and visibility across more than 22 manufacturing and research facilities and operations for an American pharmaceutical firm. Leveraged GRC frameworks to comply with multiple geo-specific regulations. Delivered 24x7 monitoring and management of security solutions for an American hospitality chain with operations in over 100 countries. The services included network, data, perimeter, and end-user security. Provided a single-dashboard view for enterprise-wide visibility. Provided cybersecurity monitoring services to enhance the visibility across the hybrid environment, as a Swiss-based insurance service provider moved to a cloud-based hybrid infrastructure. Also, assisted in meeting regulatory and compliance requirements. Enhanced visibility into the existing cloud workloads for a South African energy and chemical company. Provided a digital transformation road map to achieve business resiliency and maintain business continuity. Also, automated internal/external threat intelligence feeds. 	
\$500M-\$1B Cybersecurity services revenue, Sep'20	10%-20% Cybersecurity services growth, Sep'20		
Key IP and assets		Key partnerships	Sample clients
<ul style="list-style-type: none"> BRiCS™: A business risk intelligence and compliance solutions framework Security Assessment Framework (SAF): Strategy & architecture consulting framework SecIntAI: A Security Intelligence and analytic solution for threat mitigation RiCON: Business continuity and disaster recovery services PrivacyOps: PII assessment framework 		Platform Providers Software Providers 	<ul style="list-style-type: none"> An American pharmaceutical firm An American hospitality chain A Swiss-based insurance service provider A South African energy and chemical company A fortune 500 industrial tool manufacturer A multinational hospitality chain logistics service provider A dairy cooperative
		Industry coverage	
		<ul style="list-style-type: none"> Aerospace and defense Banking Financial services Government Healthcare and life sciences High-tech Insurance Manufacturing Nonprofits Retail and CPG Telecom, media, and entertainment Travel and transportation Utilities and resources 	

Darker color indicates higher industry concentration: ●●●●●

Analyst insights

Practice maturity



- HCL offers 360-degree services, which include strategy, consulting, and architecture, followed by transformation, integration, and managed services. Their goal is to help the customer maintain a dynamic posture.
- Last year, it created two new practices: data security and data privacy and Security of Things. As many regions have produced their version of data privacy, HCL is helping customers define policies and controls and manage access to PII data through its newly formed data security and data privacy practice. Also, it is developing POCs that focus on aligning customers to best practices and frameworks from the plant security perspective.
- It continues to enhance its frameworks as follows: MIDaaS—added RPA use cases to automate the onboarding/offboarding of users from specific apps, providing a centralized dashboard for complete end-to-end state visibility of identity and access management; RiCON—revamped the existing resiliency framework for the current pandemic needs and delivered precise business impact assessments and business continuity management plans.
- During COVID, it also introduced a light version of its third-party risk management solution, 3PAS, to quickly evaluate the security policies of vendors.

Partnership ecosystem



- It expanded its preferred services partnership with Broadcom to include Symantec enterprise security consulting and premium support. It also offers education and training services to its partners and customers.
- It continues to invest in its acquired IBM products like AppScan and BigFix to offer end-to-end vulnerability management and DevSecOps capabilities.
- It has invested in the start-up ecosystem to enhance its MSS portfolio: Cymulate for threat or vulnerability detection, MetricStream for GRC, Siemplify for SOAR, and Varonis and Mentis for data security.
- It has strategic alliances with universities, such as Shiv Nadar University, to help train the cybersecurity team for the Data Security Council of India.

Investments and innovation



- It continues to invest in its managed security services, CSFC Fusion Platform, by bringing in UEBA capabilities and offers full-scale security analytics. Thus, eliminating the need for deploying multiple technology tools for monitoring enterprise assets.
- It plans to augment its cloud security practice in order to explore niche cybersecurity areas and adopt low code, no code services to ease delivery.
- Last year, it launched CSFC in Gothenburg, Sweden, which was a transformation of its existing SOC. Also, its Melbourne CSFC became operational.
- It launched a new offering, SecureOT, to protect the critical infrastructure on the plant side of the environment and help assess, strategize, design, and rearchitect industrial security controls.

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