

A cityscape at sunset with a large green circular graphic overlaying the scene. The city features numerous skyscrapers, including the Transamerica Pyramid, and a suspension bridge in the background. The sky is a mix of orange and yellow, and the water in the foreground is dark.

**Deloitte.**

# Global Cyber Overview

*Secure success*

**Operate with resilience. Grow with confidence.**

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# What's inside?

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- 3 Outlook
- 6 Services and Solutions
- 16 Why Deloitte
- 17 Contacts

## OUTLOOK

# Secure success

Organizations today are not closed off, independent entities. They are hyper-connected parts of bigger collaborative ecosystems. While these open ecosystems may feel risky or complex to manage, the greatest risk organizations face is not leveraging the opportunities they present.

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Our technology and business specialists put cyber to work for your organization. They use their breadth of knowledge, from finance to customer experience, to amplify cyber's impact and deliver outsized outcomes.

Our powerful solutions simplify complexity, accelerate innovation, and supercharge transformation. That way, you can operate with resilience, grow with confidence, and secure success for your organization.



# We understand your challenges & opportunities.

We'll work alongside you with a full range of services to help you foster innovation for secure and sustainable growth.



We are moving quickly on digital transformation, **moving to the cloud and migrating systems.** Can you help us to make sure they are cyber secure?

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How do we effectively manage **the convergence of IT and OT** environments?

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How do I prepare our organization for and defend against **today's sophisticated cyberattacks?**

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What are the **identity access requirements around cloud** or even a hybrid environment?



Our remote workforce means **1,000s of new devices and endpoints on our networks** and systems, how do we track and manage them all?

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How do I manage **the complexity of compliance** with the evolving regulatory environment?

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What do we need to do to **improve our existing security operations** to match the current threat landscape?

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How can we **create a future of trust** across the enterprise and with our customers?

## OUTLOOK

# We listen to your needs.

Our focus on personal relationships, the breadth and depth of our experience, and deep technology and product innovation enable us to bring stakeholders together for increased interoperability and impact.

Whatever your organization's strategic business priorities, we'll help you improve threat awareness and visibility and strengthen your ability to thrive in the face of cyber incidents.

No matter how complex your situation, we'll always listen and work with you to address your questions and find the right answers for your unique needs.

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**We advise, implement, and manage cyber solutions where you need us most, across your entire enterprise.**



# Cyber services and solutions

**Deloitte offers a fully customizable suite of cyber solutions and managed services. With a commitment to technological innovation and broad industry expertise, our Deloitte global network gives us the insight and experience to face any scenario.**

## Application Security

Portfolio of application security solutions from strategy and implementation to managed services and operations that meet your security and compliance goals.

## Cyber Cloud

End-to-end Cyber + Cloud capabilities tailored to our clients' environments while enabling significant and secure digital transformation.

## Cyber Strategy

Cyber risk program in line with your organization's strategic objectives and risk appetite.

## Data and Privacy

Suite of data and privacy services to address data management opportunities and challenges.

## Detect and Respond

Blend of sophisticated monitoring technology, advanced analytics, and human intelligence to detect, analyze, and contain threats before they disrupt business.

## Emerging Technologies

Our global Emerging Technologies team is here to help you get connected, stay connected, and connect to whatever the future makes possible.

## Identity

Deloitte Global Cyber can advise, implement and operate a broad suite of Identity services with licensing and hosting terms built-in.

## Infrastructure Security

The solutions provided by our Infrastructure Security team bring resilience to your core technology and extended networks.

## Recover and Transform

End-to-end incident response services bringing greater resilience and cyber maturity, ensuring continual improvement of your underlying infrastructure and capabilities.

# Application Security

**The more applications you run, the more you need a holistic approach to security.**

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We heard you when you said you need to achieve secure business transformation faster. That's why we provide cyber accelerators to speed up implementations that result in secure and well-controlled applications, whether migrating to SAP S/4 HANA or undergoing a cloud transformation effort. We'll help you to standardize processes and improve customer experience by more effectively managing identities across the application ecosystem.

Not only will you be able to deal with emerging threats, you'll be capable of monitoring the overall solution for delivery excellence, compliance, quality, process improvements and other innovations activities. And we'll help you to reduce risk and costs without compromise by using advanced technology to transform business-critical risk processes and approaches that make implementations more effective and efficient.

**Deploy a portfolio of application security solutions from strategy and implementation to managed services and operations that meet your security and compliance goals.**

- Application testing
- Concept and requirements
- Design and development
- GRC dashboards
- Maintenance and retirement
- Production
- Risk sensing
- Touchless security
- Verification and validation

# Cyber Cloud

Moving to the cloud changes your perspective on risk.

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The cloud is much more than a technology or a place. It's an opportunity to reimagine your organization's approach to data, a catalyst for transformation that drives growth and flexibility. But moving to the cloud also accelerates the need to create secure IT environments that support emerging technologies such as IoT, edge computing, AI and 5G. Our global team of cloud professionals can help your organization embed cyber into your evolving cloud strategy. It means integrating cybersecurity into cloud capabilities to achieve business goals bringing transformation through the speed, resilience and scale of cloud solutions.

Deloitte Global Cyber can help. We bring Cyber + Cloud capabilities together with a deep understanding of shared responsibility models between the enterprise and cloud service provider. You'll also benefit from our knowledge of the cloud threat landscape, as well as global and local regulatory and compliance requirements such as GDPR (General Data Protection Regulation) China's Cybersecurity Law, CCPA (California Consumer Privacy Act), and others.

We provide a wide range of innovative, end-to-end Cyber + Cloud capabilities tailored to our clients' environments while enabling significant and secure digital transformation.

- Cloud governance and compliance
- Cloud infrastructure security
- Cloud security management
- Cloud security strategy and planning





# Cyber Strategy

Getting a clear picture of your cybersecurity needs is the first step toward mitigating risk.

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We can help you develop a complete cybersecurity program. It begins with structuring the right incentives to ensure you adopt cyber assessment practices suited to your business needs.

Our cybersecurity team will establish the correct metrics and reporting methods so senior executives and your board can understand the ongoing results of your program. These will include determining the risks posed by your employees and third-parties as well as supply chain vulnerabilities.

Developing a cyber risk program in line with your organization's strategic objectives and risk appetite.

- Cyber awareness
- Cyber program governance
- Cyber risk assessments
- Cyber risk quantification
- Cyber strategy framework
- Third party risk management

# Data and Privacy

**Building trust through responsible and ethical data use is fundamental for the sustainable success of your organization.**

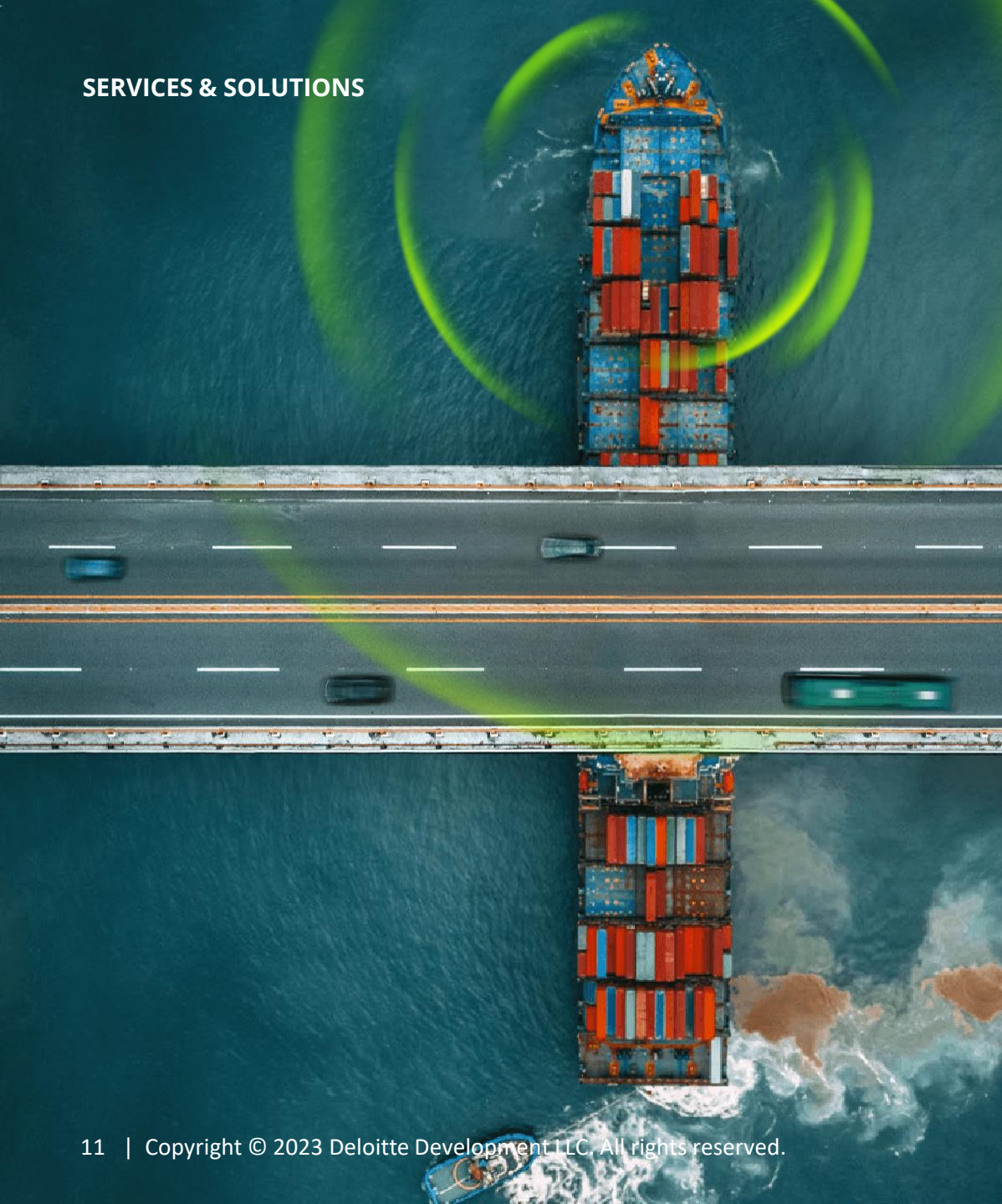
Privacy compliance is important, but our Data and Privacy team equally focuses on the opportunities that privacy legislation brings. We help organizations reap the benefits of their data in a responsible and ethical manner. The responsible use of data enhances trust, which helps build and maintain strong relationships with your customers/consumers and stakeholders, allowing for a competitive advantage. We will assist you in gaining strategic insights from data to make informed decisions and seize opportunities.

- Enable responsible and ethical digital interaction with customers/consumers while protecting their personal data
- Enhance stakeholder trust and build stakeholder relationships
- Support strategic decision making by leveraging data insights
- Reduce operational costs while demonstrating compliance
- Protect critical data throughout your organization

**Deloitte Cyber offers a suite of data and privacy services to address data management opportunities and challenges.**

- Privacy by design
- Digital ethics and innovation
- Data privacy technologies
- Trust experience (building customer trust through responsible data use)
- Accountability and governance
- Data management
- Privacy assurance





# Detect and Respond

As cyberattacks grow in frequency and sophistication, you need to outsmart the cybercriminals.

With the proliferation of remote work and the steady advance of the IoT, potential vulnerabilities are multiplying. As it gets harder to monitor this growing attack surface, deploying AI-based and other sophisticated automated technology for routine surveillance is becoming essential.

We provide evidence-based knowledge about existing and emerging threats in a timely, accurate, relevant, and predictive manner. Intel drives security operations and informs and enhances decisions at every level.

Deloitte Cyber delivers a blend of sophisticated monitoring technology, advanced analytics, and human intelligence to help you detect, analyze, and contain threats before they disrupt business.

- Attack surface management
- Incident response
- Cyber threat intelligence
- Monitoring and management
- Security operations
- Threat detection and response
- Threat hunting

# Emerging Technologies

Let cyber enable your success.

Technologies are constantly evolving, revolutionizing our clients' businesses. We work with you so your business can thrive with access to all of those great, amazing, mind-blowing things that emerging technologies make possible.

As innovation accelerates, there is growing a convergence between Information Technology (IT) and Operational Technology (OT) environments. Together with connected devices, cyber will help you scale and increase your abilities to meet the needs of your customers.

An effective cyber solution for emerging technologies also helps you stay in control of cybersecurity risks not only within the operations environment – but throughout the connected products and services that power business. So, you can take full advantage of everything that digital transformation has to offer.

**From Smart Cities, Connected Products, and OT, to 5G, AI Quantum Computing and beyond the horizon, our global Emerging Technologies team is here to help you get connected, stay connected, and connect to whatever the future makes possible.**

- Connected products
- Industrial Control Systems (ICS)
- Innovation
- Internet of Things (IoT)
- Smart Cities





# Identity

With your network touching employees, customers, and devices, knowing who and what you're exchanging data with is paramount for all stakeholders.

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So, it's no surprise that Identity continues to be the leading attack vector for cyber criminals, with many organized crime groups exploiting weaknesses in consumer and enterprise Identity controls. Effective Identity access and governance is vital for presenting a compelling first contact point to your customers, protecting sensitive data, enabling secure transactions, and transforming business processes. Deloitte's strong relationships with leading Identity technology vendors, enables us to focus on continuous training and co-development, enabling you to go to market faster and with reduced risk.

Deloitte Global Cyber can advise, implement and operate a broad suite of Identity services with licensing and hosting terms built-in, so your team can focus on strategic business objectives rather than managing large complex identity environments.

Deloitte Cyber brings 20+ years of experience across all Identity Management domains to help clients sustain, transform, and evolve their identity capabilities.

- Advanced authentication
- Digital Identity
- Identity governance
- Consumer Identity
- Directory services
- Privileged access management
- Identity analytics

# Infrastructure Services

## Strengthening and protecting your technical backbone.

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Traditional infrastructure technologies and environments are being disrupted as they are driven to become more agile, reduce cost and simplify. At the same time, your ecosystem may have rapidly expanded through your newly remote workforce, your global supply chain and increasing dependence on the cloud. Together, these forces are an unwelcome stress test of your ability to track and manage your technology infrastructure.

As technology continues to revolutionize business—via automation, virtualization, hybrid data center and software defined networks—threats to operations become increasingly complex. It's vital to rethink how security is integrated across modern infrastructure: physical, network, servers and storage, and endpoints. Also, the changes brought by “anytime and anywhere access” mean adversaries are using new channels and vectors through modern infrastructure attack surfaces making device protection a core function of cybersecurity programs.

To stay secure and competitive, you need to:

- Leverage SaaS and cloud-based services so IT can focus on core capabilities driving value
- Enhance customer and user experience, including omnichannel support
- Modernize and integrate supply chains
- Execute on digital transformation strategies to stay relevant and connected to customers

## The solutions provided by our Infrastructure Security team bring resilience to your core technology and extended networks.

- Asset management
- Core infrastructure security
- Mobile and endpoint security
- Technical resilience
- Threat and vulnerability

# Recover and Transform

**In the wake of a cyber incident, you can take a bad situation and emerge stronger.**

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There are no longer isolated cyber incidents or attacks targeted at specific industries. They're happening across industries and geographies. Today's cyber adversaries are organized and use sophisticated tools. As we become more digital, more connected, the risk of cyberattack increases exponentially. It's important to understand what is happening, why it's happening, and how Deloitte can help. Effective management and smooth recovery from cyber incidents only happen with careful preparation. Deloitte Cyber will work with your teams to help you prepare, practice and protect what matters most.

We bring the right balance between protection and recovery mechanisms to help you defend and recover when an attacker breaches security. We recognize this balance is different for every industry and client.

We'll help you prepare for the unknown, test and strengthen your response plans, and be there to help you through whatever may come your way. Should any incident occur, we'll help you recover your systems, restore your reputation and partner with you to regain market share, and emerge more resilient than before.

**Recover to the future, not the past, with our end-to-end incident response services. We see you through to greater resilience and a mature state of cybersecurity, ensuring continual improvement of your underlying infrastructure and capabilities.**

- Business recovery
- Cyber transformation
- Digital forensics
- Incident response
- Technical investigation
- Technical resilience

# Recognized leader in cybersecurity

Ranked #1 in Market Share for Security Consulting Services based on revenue for 11th consecutive year by Gartner

[Source:](#) Gartner, Gartner Market Share Security Consulting Services, Worldwide, 2021

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Named a global leader in cybersecurity Incident Response Services by Forrester

[Source:](#) Forrester Research, The Forrester Wave™:Cybersecurity Incident Response Services, Q1 2022, By Jess Burn with Joseph Blankenship, Danielle Jessee, Peggy Dostie, Published 28th March 2022

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Named a leader in Worldwide Incident Readiness Services by IDC

[Source:](#) "IDC MarketScape: Worldwide Incident Readiness Services 2021 Vendor Assessment", by Craig Robinson and Christina Richmond, November 2021, IDC # US46741420

Named a worldwide leader in Managed Cloud Security Services by IDC

[Source:](#) IDC MarketScape: Worldwide Managed Cloud Security Services in the Multicloud Era 2022 Vendor Assessment, by Cathy Huang, September 2022, IDC # US48761022

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Named a leader in Cloud Security Services in the Asia Pacific region by IDC

[Source:](#) IDC MarketScape: Asia/Pacific Cloud Security Services 2021 Vendor Assessment, By Cathy Huang and James Sivalingam, June 2021, IDC #AP47097721e

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Named a leader in Canadian Security Services by IDC

[Source:](#) IDC MarketScape: Canadian Security Services 2022 Vendor Assessment, by Yogesh Shivhare March 2022, IDC #CA48060922



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