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RESEARCH

Everest Group PEAK Matrix™ for Healthcare IT Security Service Providers 2020

Focus on DXC Technology

December 2019

Everest Group®
PEAK MATRIX™

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Introduction and scope

Everest Group recently released its report titled "Healthcare IT Security Services PEAK Matrix™ Assessment with Service Provider Landscape 2020." This report analyzes the changing dynamics of the healthcare IT security services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 13 service providers on the Everest Group PEAK Matrix™ for healthcare IT security services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of healthcare IT security service providers based on their absolute market success and delivery capability.

Based on the analysis, **DXC Technology emerged as a Leader**. This document focuses on **DXC Technology's** healthcare IT security service experience and capabilities and includes:

- DXC Technology's position on the healthcare IT security services PEAK Matrix
- Detailed healthcare IT security services profile of DXC Technology

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Source: Everest Group (2019)

Background of the research

Healthcare challenges such as changing business and care delivery models to support patient-centricity and consumerism, growing competition from both within and outside the industry, and increasing regulatory pressures are leading to increased investments in data and technology by enterprises. Point-to-point upgrades, coupled with high technical debt levels, have increased security vulnerabilities to a large extent. The healthcare industry has been slow to respond to cyber threats and has lagged other industries when it comes to IT security investments, making healthcare a lucrative target for hackers. As a result, the past few years have seen some of the biggest attacks on healthcare enterprises, resulting in theft of millions of patient records.

As a result, senior executives in healthcare enterprises acknowledge the seriousness of the threats (such as loss of goodwill, large penalties by regulators for data breaches, and partial or complete shutdown of operations resulting in lost revenues) that cyber attacks pose to their business. Security is considered not only as an IT initiative, but also as a business imperative.

In this report, we analyze the capabilities of 13 healthcare IT security service providers. These service providers are mapped on the Everest Group PEAK Matrix, which is a composite index of a range of distinct metrics related to a vendor's vision & capability and market impact. We focus on:

- Market trends for healthcare IT security services
- The landscape of service providers for healthcare IT security services
- Assessment of the service providers on several vision & capability- and market impact-related dimensions

Scope of this report:

Geography
Global

Industry
Healthcare payers and providers

Services
Healthcare IT security services

Healthcare IT security services PEAK Matrix™ characteristics

Leaders:
Accenture, DXC Technology, HCL Technologies, IBM, and Wipro

- Leaders have balanced portfolios in IT security segments to offer large-scale security transformation to healthcare enterprises
- These players stay ahead of the competition through continued investments in next-generation security solutions; they also leverage industry partnerships for improving their offerings portfolio
- Leaders have strong healthcare-specific security frameworks (such as DXC's cybersecurity framework and Wipro's cybersecurity framework), which they leverage in consultative projects for improved client delivery
- Current Leaders face a stiff challenge from Major Contenders, some of whom offer niche security services along with expertise in specific security segments. Leaders need to continue focusing on building verticalized offerings to serve the need for healthcare enterprises leveraging next-generation security themes

Major Contenders:
Cognizant, Deloitte, Fujitsu, NTT DATA, Optum, and Unisys

- Major Contenders include a mix of global and regional players offering a combination of horizontal solutions and healthcare-specific offerings
- These players have limited enterprise mindshare due to a restricted geography focus and inadequate investments in next-generation security themes
- These players have built meaningful capabilities to deliver IT security services. However, their service portfolios are not as comprehensive as those of Leaders (either in terms of coverage across IT security service segments, service type, or geographies, or all)

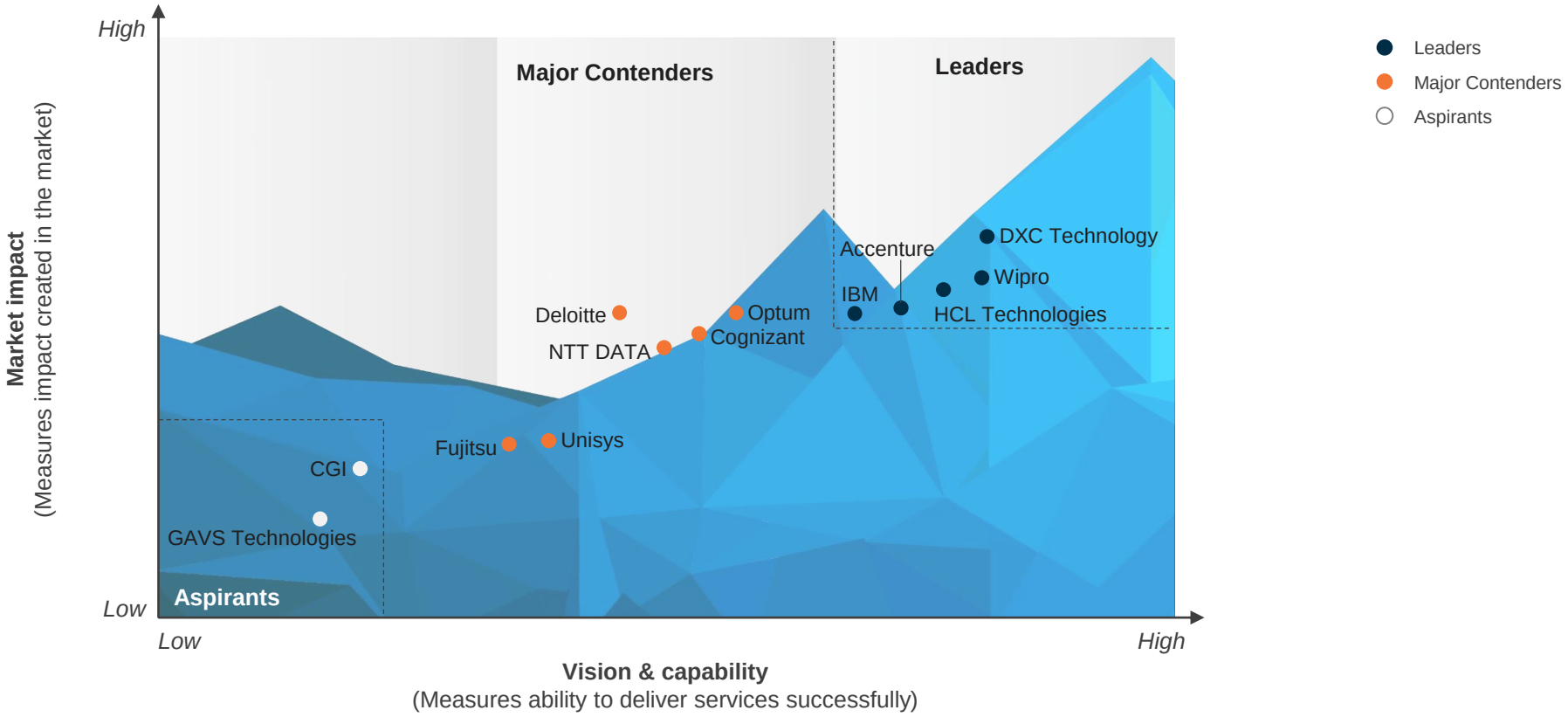
Aspirants:
CGI and GAVS Technologies

- Aspirants are majorly focused on small and mid-sized clients with low focus on large clients. The IT security services business is not a leading revenue generator for such players
- Their offerings are broadly industry-agnostic and have less contextualization to healthcare
- Nevertheless, these companies are making investments to build broader capabilities in security services through technology partnerships

Everest Group PEAK Matrix™

Healthcare IT Security Services PEAK Matrix™ Assessment 2020 | DXC Technology positioned as Leader

Everest Group Healthcare IT Security Services PEAK Matrix™ Assessment 2020



Note 1: PEAK Matrix specific to healthcare IT security services
Note 2: Assessments for Accenture, CGI, Deloitte, Fujitsu, IBM, and Unisys exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interaction with healthcare firms that are buyers of healthcare IT security services

DXC Technology | Healthcare IT security services profile (page 2 of 3)

Case studies and solutions

NOT EXHAUSTIVE

Case study 1: Develop a secure network for Intermountain Healthcare		Case study 2: Improve audit and compliance reporting for a large district general hospital	
Business challenge	The client wanted a solution that could resolve the challenge of evolving regulations carried by legal and financial penalties	Business challenge	The client wanted to improve audit and compliance reporting, quickly react to the threat landscape, and identify requirements to implement a security operations center
Solution and impact	DXC developed a scalable, self-healing, controlled, and managed network infrastructure design to protect data, applications, and systems solution based on revised security policies, guidelines, and procedures. The solution helped the client to protect patients' data and emerging cyber threats	Solution and impact	DXC provided end-to-end assessment using its Cyber Reference Architecture. It gave an external view of vulnerabilities, based on industry standards, a gap analysis of technology, policies, processes, training, and people; and requirements for establishing an SOC, and provided recommendations for security standards and principles to achieve cyber security strategy, a clear roadmap of process and timeline, and indications of staffing resources and costs

Healthcare IT security regulations (representative list)	
Regulation	**Details**
GDPR	Provides security solutions, analytics, and advisory services to help clients become GDPR-compliant. It identifies and categorizes organization's personal data, thus, creating a data inventory to assess GDPR-compliance readiness
HIPAA	Provides full guidance to implement HIPAA, privacy and security compliance management, policy development consulting, and process governance
ISO	Provides implementation of ISO27001, the standard implies a well-known framework to implement industry best practices in the area of physical security and security incident management
NIST	Provides implementation of NIST, a standards of framework for improving critical infrastructure cybersecurity

DXC Technology | Healthcare IT security services profile (page 3 of 3)

Investments and partnerships

NOT EXHAUSTIVE

Vision: DXC Technology's vision for IT security services is to deliver an intelligent approach to security for their customers, by matching the sophistication of its customers' defenses with that of their attackers in order to proactively neutralize threats to their business. DXC Technology helps its customers to prepare (implementing best practices and stopping attacks early with good hygiene), recognize (constant monitoring/detection to stop many attacks by breaking the attack chain), and respond (quickly and effectively respond to incidents and mitigate impact) to incidents and attacks. DXC Technology's Cyber Reference Architecture provides a framework to apply correct measures for client challenges using threat intelligence capabilities and customers' IT/business context.

Key proprietary solutions (representative list)

Solution	Details
Cyber Reference Architecture	A set of detailed blueprints that help clients optimize security spend by addressing their specific challenges, benchmark as-is security posture, and standardize service delivery
Cloud security	A solution that leverages cloud provider and vendor security technologies to improve the overall security posture by providing vendor-neutral guidance
DXC Health360	A cloud-based solution that enables providers and payers to personalize care experiences, ensure quality, and increase customer loyalty at lower cost
DXC Healthcare Cloud	A cloud-based solution that reduces complexity and risk, while allowing approved parties to securely access applications and data 24x7
DXC Open Health Connect	A healthcare platform that improves healthcare outcomes by creating a connected ecosystem for patients, providers, and payers

Recent activities (representative list)

Development	Type	Details
Security Operation Center (2019)	CoE	Opened an SOC in Malaysia to tackle cybersecurity threats in Asia. It aims at enhancing and strengthening the overall security of enterprises by integrating advanced security analytics across IT and Operational Technology (OT)
NelsonHall Evaluation & Assessment Tool (NEAT)	Certification	Certified as a leader in the NelsonHall Evaluation & Assessment Tool (NEAT) for GDPR Services
Microsoft	Partnership	To launch new cloud-native SIEM/SOAR automation capabilities on Microsoft's Azure Sentinel Platform for Hybrid with integration into Microsoft Threat Platform for Azure Policy, Security Center, ATP, Cloud App Security using Logic Apps Automation
Symantec	Partnership	To launch multi-cloud workload assurance and protection for cloud-native policy solution to manage policy and compliance across public clouds
Okta	Partnership	To launch Cloud-Native PAM to support centralized identity security in organizations leveraging on-premise, hybrid, and cloud infrastructure to increase security using zero-trust access, visibility, control, and create a better consumer experience

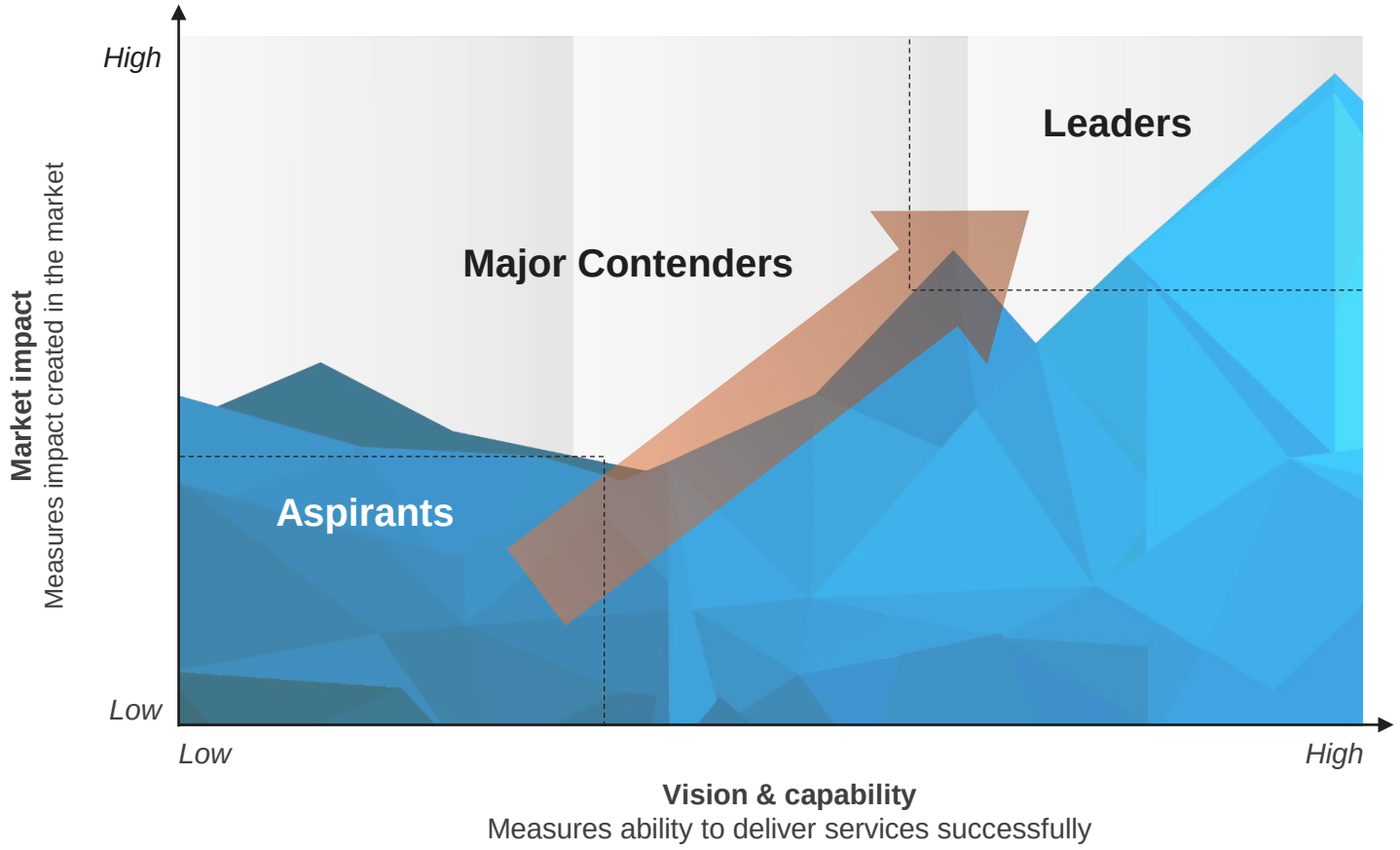
Source: Everest Group (2019)

Appendix

Everest Group PEAK Matrix™ is a proprietary framework for assessment of market impact and vision & capability

Everest Group® PEAK MATRIX™

Everest Group PEAK Matrix



Services PEAK Matrix™ evaluation dimensions

Everest Group® PEAK MATRIX™

Measures impact created in the market – captured through three subdimensions

Market adoption

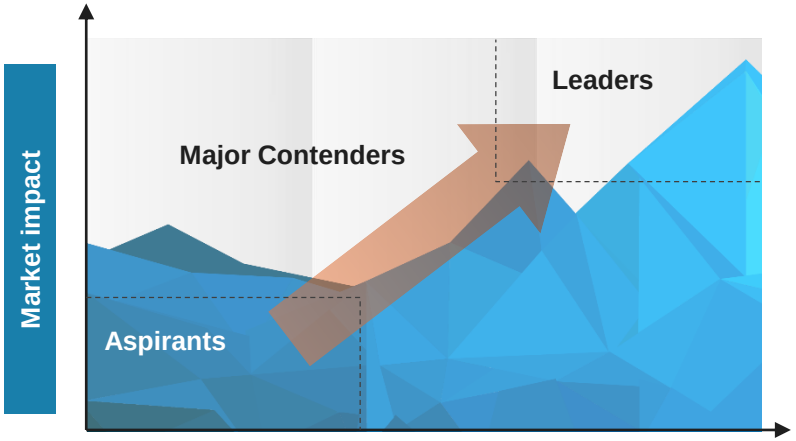
No. of clients, revenue base, and YOY growth, deal value/volume

Portfolio mix

Diversity of client/revenue base across geos and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact



Vision & capability

Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service sub-segments / processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint

Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix™ assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  - Issue a press release declaring their positioning. See citation policies
  - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

Everest Group®

About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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