CYBERSECURITY CENTRE of EXCELLENCE

A joint initiative of DSCI & Government of Telangana

DSCI

PROMOTING DATA PROTECTION

CYBERSECURITY FOOTPRINT IN TELANGANA

Telangana – IT/ITES

Hyderabad is named the global centre of information technology. Not only cybersecurity service companies but also various GCCs and MNCs like Microsoft, Google, IBM, Deloitte have a footprint in the State of Telangana.

To facilitate greater IT and ITeS investments in India, the Telangana government is aggressively establishing Export Oriented Units (EOU), Software Technology Parks (STP), and Special Economic Zones (SEZ).

There are **1500 IT/ITeS companies** that employ over **5.8 lakh professionals**, besides providing indirect employment to over 7 lakh people.

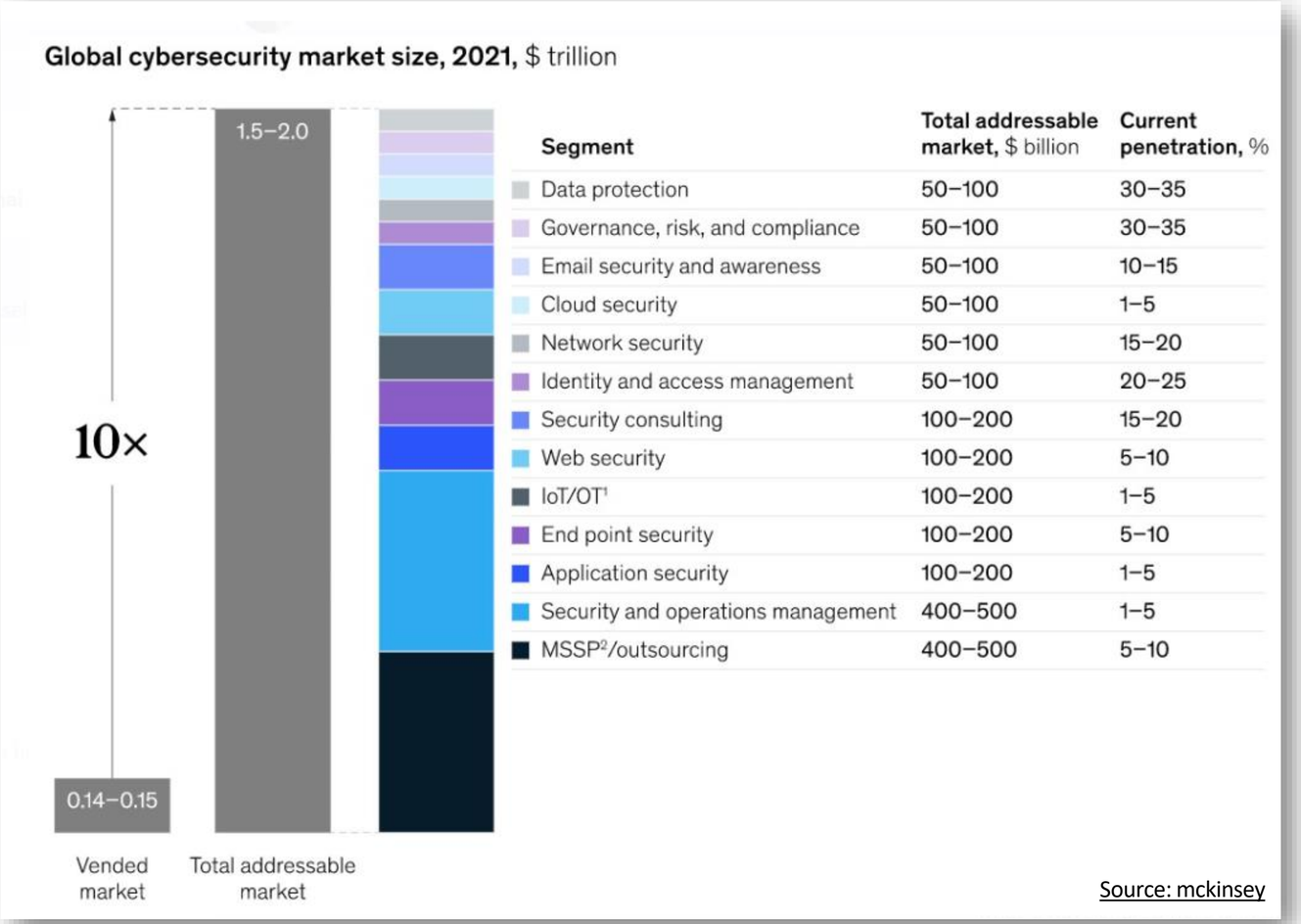
Telangana's **IT/ITeS Exports grew at 17.93%** compared to the **National Average of 8.09%** and the rest of the **Nation's Average of 6.92%.**

Telangana's exports in India went up from **10.6% to 11.6%** and the **share of Telangana** in this year's growth in **National Exports** is a remarkable **23.5%.**

$2 trillion market opportunity

For Cybersecurity Technology And Service Providers

- At the current rate of growth, damage from cyberattacks will amount to about $10.5 trillion annually by 2025—a 300 percent increase from 2015 levels
- At approximately 10 percent penetration of security solutions today, the total opportunity amounts to a staggering $1.5 trillion to $2.0 trillion addressable market



Segment	Total addressable market, $ billion	Current penetration, %
Data protection	50–100	30–35
Governance, risk, and compliance	50–100	30–35
Email security and awareness	50–100	10–15
Cloud security	50–100	1–5
Network security	50–100	15–20
Identity and access management	50–100	20–25
Security consulting	100–200	15–20
Web security	100–200	5–10
IoT/OT[1]	100–200	1–5
End point security	100–200	5–10
Application security	100–200	1–5
Security and operations management	400–500	1–5
MSSP[2]/outsourcing	400–500	5–10

Source: mckinsey

Cybersecurity Market

- The **Indian Cyber Security Market** was valued at **USD2200.23 million** in the year **FY2021**.
- The market growth is anticipated to continue during the forecast period, **FY2023-FY2027**, with a **CAGR of 8.05%** to achieve a market value of **USD3543.37 million** by **FY2027**.
- Evolving trend of bringing your own devices (BYOD) to work and thus surging demand to protect the data from the companies and increasing requirement to monitor the sharing of valuable company integral data through BYOD devices are further substantiating the growth of the Indian Cyber Security Market in the forecast years through FY2027.

Demand For Cybersecurity Professionals

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- 4,765 job openings were identified in Telangana in FY 2020-2021.
- There were additional 1,107 openings for Security Product companies.
- IT Services/BPM leads in the consumption of cybersecurity skills, reflecting the rising export of cybersecurity services & an increase in domestic demand.
- Global Capability Centres (GCCs) follow the IT Services/BPM with 19% share and the User industry with 14% share according to FY 2020-2021.

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200+
Companies

35+
Industry Sectors

Have Cybersecurity Teams in Telangana

Classification of Companies

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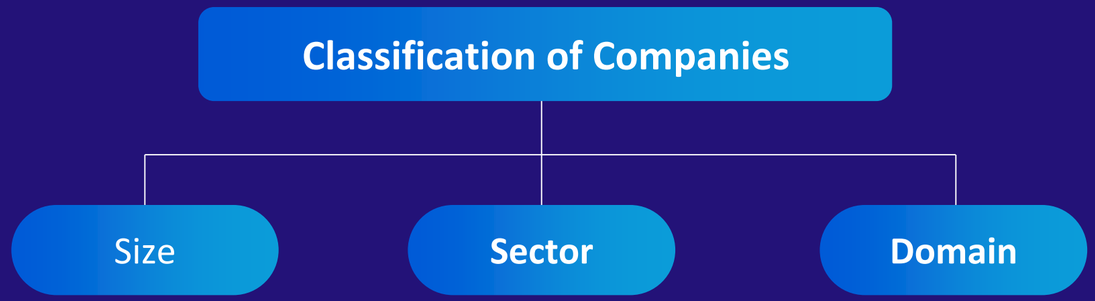
- Here, the companies' data and their classification has been done based on the jobs available in the market pertaining to different sectors and domains in cybersecurity.
- Hence, the number of large companies having cybersecurity teams is greater than the number of small and medium-sized companies in the size-wise demarcation of companies.
- A reason could be that the limitations in budget and staffing lead smaller companies to outsource their cybersecurity work to larger companies.



Methodology Used To Retrieve Companies' Data

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Following is a list of keywords (not inclusive of all the keywords that were used during the research) that were used to identify companies with active cybersecurity teams based on their recruitment activity:

- App Sec
- Application Security
- App Security
- Security Operations Centre
- SOC
- Product Security
- Product sec
- Privacy
- Data privacy
- Cybersecurity Engineer
- Network Security
- Cloud Security
- Information security
- Automotive Security
- Hardware Security
- IoT Security
- End point security

Size Wise

58+
SMALL
STARTUP

62+
MEDIUM

80+
LARGE

Sector Wise

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100+	IT Services & IT Consulting
4+	Business, Consulting & Services
14+	Financial Services
6+	Technology, Information & Internet
11+	Others
15+	Manufacturing
10+	Hospitals & Healthcare
15+	HR Services; Staffing & Recruiting
25+	Software Product Companies

Domain Wise

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7+
Automotive

25+
Information Security

10+
VAPT

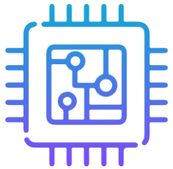
40+
Cloud Security

30+
AppSec

10+
Enterprise Security

13+
Compliance

25+
Others



20+
SOC

10+
Identity & Access Management

20+
Computer & Network Security

Technology And Service Providers

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claranet
Qualcomm
Tech Mahindra
Uber
aws
NTT
UNZO
Arete
SYNOPSYS
ivanti
Gainsight
TACHYON TECHNOLOGIES
TCS TATA CONSULTANCY SERVICES
Cyberensis Infosec
NCR
teradata.
Hitachi Vantara
OLA

Technology And Service Providers

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Deloitte.

Google

WATI

CLOUD4C
A CtrlS Company

PEGA

Mindtree
A Larsen & Toubro Group Company

accenture

f5

EY

Network Security Pvt Ltd

CYCOPS
Trusted, Proven & Improving

Microsoft

wipro

Financial services & accounting

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Hospitals & Healthcare

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Healthcare cybersecurity focuses on preventing

- Attacks by defending systems from unauthorized access and use
- Disclosure of patient data
-

NAPIER Healthcare

Optum

ThermoFisher SCIENTIFIC

Manufacturers

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HYUNDAI MOBIS

SIGNANT HEALTH
THE EVIDENCE GENERATION COMPANY™

Cispact
Creating Impact

FISKER

DUPONT

Carrier

OSI SYSTEMS, INC.

STELLANTIS

ResMed

celestial AI

HR Services: Staffing & Recruiting

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iBovi Strategic Security

CIEL HR inspired by science

PROMAYNOV BRIDGING THE GAP

ADP

accurate.

EYEGLOBAL

MMR

tigi HR

TEKWISSEN
USA | UK | CANADA | INDIA | AUSTRALIA | PHILIPPINES
www.tekwissen.com

gtx

Others

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POKERSTARS
POKER | CASINO | SPORTS

XENONSTACK
A Stack Innovator

Worley
energy | chemicals | resources

epiq

PEPSICO

at&t

9SUMMITS
TECHNOLOGY - INNOVATION - AUTOMATION

DSM

Medtronic

salesforce

CORIZO
Empowering Tomorrow's Leaders

HABIB IT SOLUTIONS

TRIANZ

About CCoE

A joint initiative of DSCI & Government of Telangana.

Our Purpose

- Create a conducive cybersecurity and privacy ecosystem
- To capture a share of the $250 Billion Cybersecurity Market
- Accelerate innovation and entrepreneurship in Cybersecurity and Privacy domain

List of few of CCoE's Initiatives

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2019

- 5G & Security Consultation
- RATS SCO Workshop
- Malware Analysis & Threat Hunting Workshop
- UK-India FinTech & Cybersecurity Forum

2020

- Indo Dutch Cyber Security School
- Digital Payment Abhiyan Launch Telugu Campaign
- GCC's Cybersecurity leaders Virtual Meet
- Use Case Clearing House (UCCH)

2021

- Global Cyber Insurance Summit 2021
- IoT security Startups meet
- International Cyber & information security conference with GCTC
- The Great AppSec Hackathon-2021

2022

- Data Privacy Symposium in collaboration with ICFAI
- International Conference on Data Surveillance
- Pharma Roundtable in association with Deloitte

Metrics of CCoE's key initiatives from FY 2021-2022

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Accelerator Program with Tech Mahindra

- **8** startups pitched on Tech Mahindra innovation Day on 29 September 2021, resulting in one of the Startup “Strobes” acquiring a client in Singapore.

The Great AppSec Hackathon

- **5000+** students participated in this nation-wide Hackathon on **Web application security**.
- **Top 20** were given monetary compensation along with internship opportunities in reputed companies like **Synchrony**.

GIC-Re Cybersecurity Insurance Summit

- Organized the first Global Cyber Insurance Summit in association with GIC Re, and City of London Corporation.
- Focused on the ever-evolving trends of cyber liability global pandemic changing risk, AI helping to manage that risk.

Data Privacy Symposium

- CCoE organized an online Symposium on Data Privacy with the aim to raise awareness on latest developments, disseminate best practices and promote data protection.
- The key themes of the symposium centered around privacy laws, first one hundred days of privacy program, practical implementation aspects of the Data Protection Bill.

CCoE Startup Showcase Series

- Organised 4 sessions with 4 of our incubated start-ups (Analysabl, CSCC labs, BluSapphire, Amberflux) to showcase their products/services to **industry, government, user enterprises, and academia.**

Indo-Dutch Cybersecurity Summer School

- 4th October 2021 – 29th October 2021
- 234 Students Participated in the 3 weeks program
- 180 students qualified to second round and participated in challenges.

CCoE KRAs Achieved in FY 2022

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18 Startups accelerated

5 **Capability Building – # Faculty & Student programs**

7 **Marketing & Outreach - participation in National & International industry roadshows, conferences, events,etc.**

Capability Building - #Professionals:

- **735** Total Professionals Trained
- **460** Soft
- **275** Hard

1 **Capability Building - #LEA programs**

Content - Research Papers, Policy Papers, Best Practices & Reports:

- **3** Done
- **2** Are in progress

CCoE Startups

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CSCCLABS.

DigitalTrust
ID Verification & Beyond

TSARO

ENTERSOFT

CYMUNE

BLUSAPPHIRE
INTELLIGENT CYBER DEFENSE

EVERSPIN

Strobes
SECURITY

analysabl
EXAMINE | INTERPRET | TRANSFORM

razorops

CCoE Startups

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MARVEN DATA SYSTEMS

FRUGALTESTING

HGX Technologies • INNOVATION • CONSULTING

RiskSek

proarch

xybrware*

END NOW FOUNDATION
ADVOCACY ON DIGITAL SAFETY

AmberFlux

LIFE OF GIRL

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Phone : 9703587766

Email : marketing.ccoe@dsci.in