



Everest Group Identity and Access Management (IAM) Services PEAK Matrix[®] Assessment 2023

Focus on Accenture
July 2023



Introduction

The surge in next-generation security threats has left enterprises worldwide grappling with cybersecurity challenges. Enterprises across the globe are in search of reliable Identity and Access Management (IAM) service providers that can offer highly tailored security services, such as Single Sign-On (SSO), multi-factor authentication, Privileged Access Management (PAM), and identity governance for compliance assurance. This approach ensures not only compliance with various regional regulations but also adherence to local data privacy laws. A robust IAM program also imparts multiple other benefits to enterprises such as enhanced user experience and productivity, heightened security, operational efficiency, and reduced burden on IT support teams.

In response, IAM service providers are expanding their capabilities to meet these diverse demands. There is also a marked drive to enhance their cybersecurity consulting capabilities, in order to be recognized as a holistic security partner that can provide end-to-end security services. Undertaking this research on IAM service providers thus seeks to shed light on their evolving capabilities and strategies.

In this research, we present an assessment and detailed profiles of 21 Identity and Access Management (IAM) service providers for the IT security capabilities featured on the Identity and Access Management (IAM) Security Services PEAK Matrix® Assessment 2023. The assessment is based on Everest Group's annual RFI process for the calendar year 2023, interactions with leading Identity and Access Management (IAM) service providers, client reference checks, and ongoing analysis of the IAM services market.

The full report includes the profiles of the following 21 leading IAM providers featured on the [Identity and Access Management \(IAM\) Services PEAK Matrix® Assessment 2023](#):

- **Leaders:** Accenture, HCLTech, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Capgemini, Cognizant, Deloitte, DXC Technology, Eviden, EY, Kyndryl, LTIMindtree, NTT DATA, Optiv, and Persistent Systems
- **Aspirants:** GAVS Technologies, Happiest Minds, Inspira, and Mphasis

Scope of this report



Geography
Global



Providers
21



Services
Identity and Access
Management

IAM services PEAK Matrix® characteristics

Leaders

Accenture, HCLTech, IBM, Infosys, TCS, and Wipro

- Leaders strive to stay ahead of the curve in the ever-evolving IAM landscape by building expertise around various IAM segments such as Identity Governance and Administration (IGA), Access Management (AM), and Privileged Access Management / Privileged Identity Management (PIM/PAM) and offering comprehensive solutions around them to gain the trust and confidence of enterprises
- These providers diligently focus on modernizing and transforming the IAM landscape of enterprises through a highly balanced portfolio and steadfast commitment to investing in technology and service development, including IP toolkits, accelerators, and frameworks, underpinned by extensive partner ecosystems. Additionally, they also invest in talent development through learning and development programs and partner-led training and certifications
- Leaders exhibit remarkable proactivity in bringing innovations and next-generation service offerings to their clients, directing a strong emphasis on identity and Access Management (IAM) for Operational Technology and Internet of Things (OT/IoT), decentralized identities, or blockchain-based IAM, Identity Threat Detection and Response (ITDR), converged IAM, IAM for hybrid-/multi-cloud and Cloud Identity and Infrastructure Management (CIEM), to name a few

Major Contenders

Capgemini, Cognizant, Deloitte, DXC Technology, Eviden, EY, Kyndryl, LTIMindtree, NTT DATA, Optiv, and Persistent Systems

- These participants pose formidable competition to the market leaders, showcasing remarkable market impact through year-over-year growth and delivering substantial value to IAM clients. Moreover, they have successfully established significant capabilities to provide comprehensive IAM services
- These participants consistently invest in the development of their IP and accelerators, while also expanding their services and partner ecosystem to address any capability gaps. However, they still lack a well-rounded and comprehensive portfolio compared to industry leaders, which is evident in the scale of market impact they have achieved

Aspirants

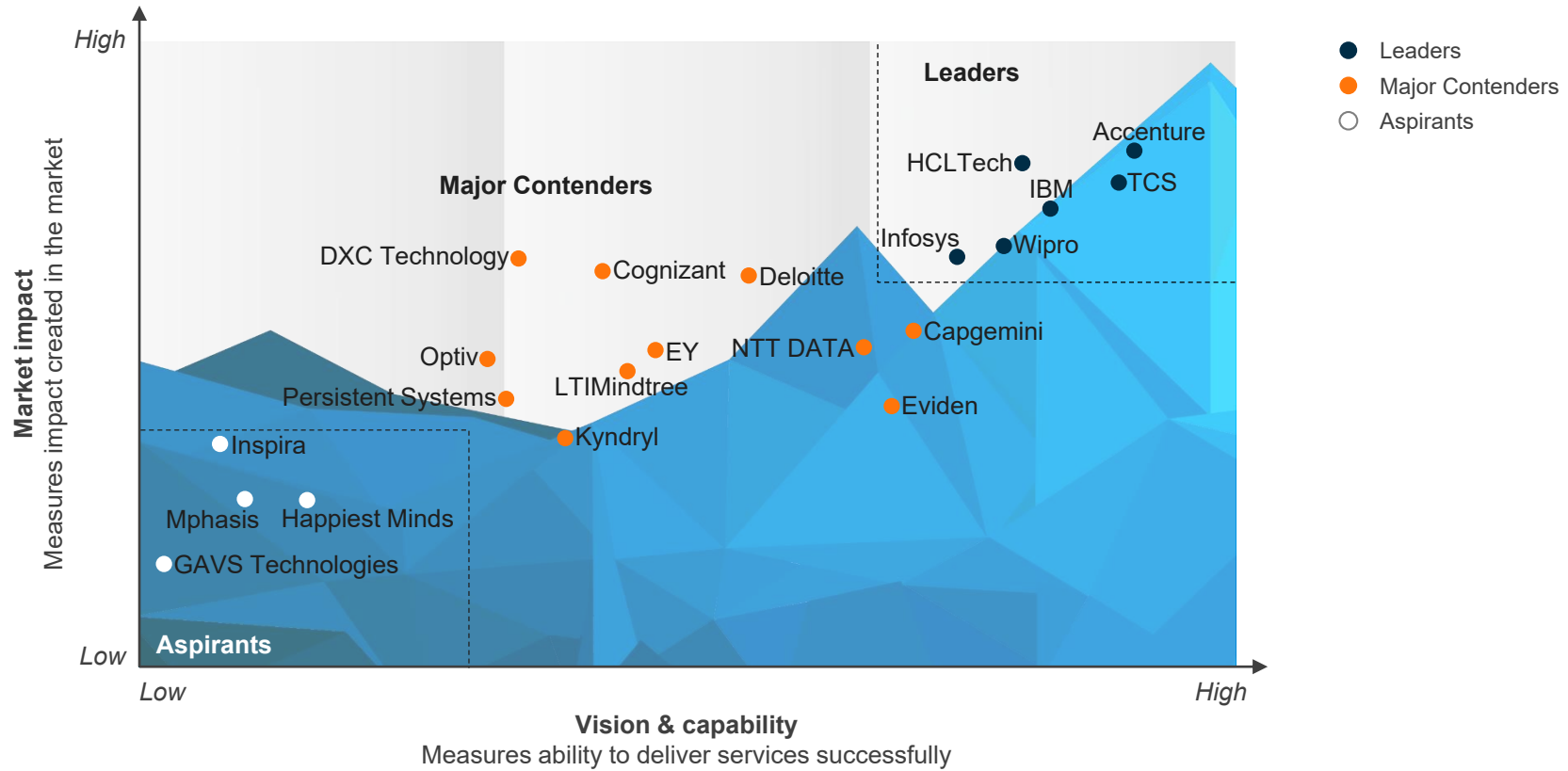
GAVS Technologies, Happiest Minds, Inspira, and Mphasis

- The IAM business of aspirants is currently in its early stages and does not serve large, very large, and mega clients in the same domain
- These providers are proactively expanding their capabilities within the IAM space. They are accomplishing this through strategic service & technology partnerships, as well as by developing IP-led solutions to serve their clients' needs

Everest Group PEAK Matrix®

Identity and Access Management (IAM) Services PEAK Matrix® Assessment 2023 | Accenture is positioned as Leader

Everest Group Identity and Access Management (IAM) Services PEAK Matrix® Assessment 2023¹



¹ Assessments for Capgemini, Deloitte, and EY excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with insurance buyers
Source: Everest Group (2023)

Accenture profile (page 1 of 5)

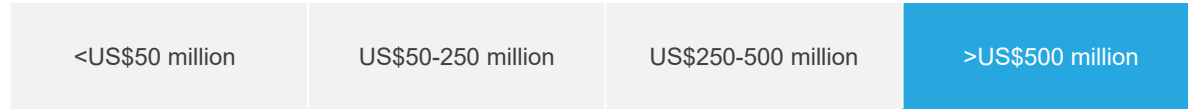
Overview

Company mission/vision statement

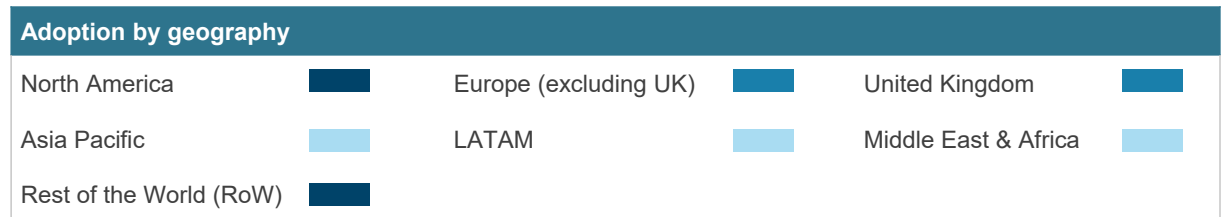
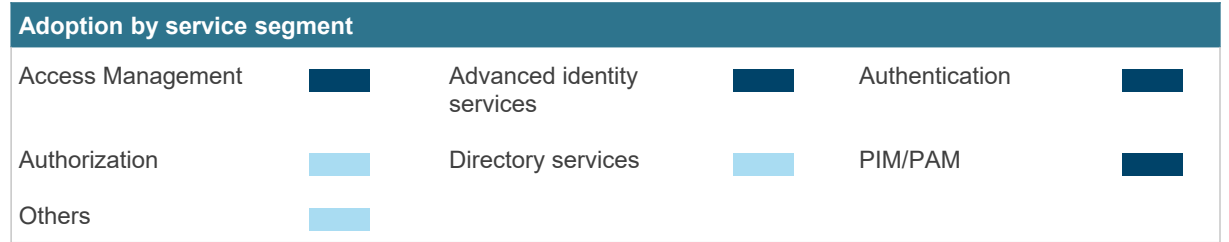
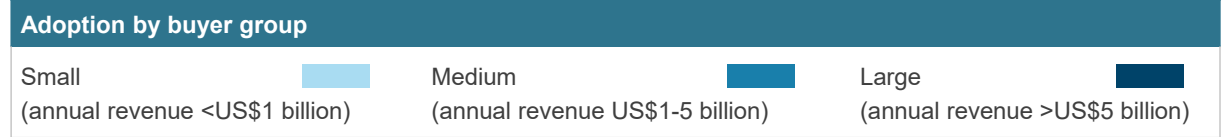
Accenture's core objective is to ensure the security of its clients' and for recognizing that IAM is significant as a foundational security control for all organizations.

Accenture's capabilities range from advisory services to transformation services and run and operate services, and these are augmented by investments in developing accelerators focusing on time-to-market and partnerships with the world's leading IAM software providers. It aids customers in their journeys via one global team that has end-to-end capabilities.

IAM services revenue



Low (<10%) Medium (10-25%) High (>25%)



Accenture profile (page 2 of 5)

Case study

NOT EXHAUSTIVE

Case study 1

Accenture is leveraging its end-to-end expertise to create, deliver, and run a complete identity governance transformation that enhances user experience at reduced cost

Client: A global bank and financial services company

Business challenge

The organization struggled for years with a **decentralized identity and access infrastructure and inflexible, decentralized identity governance functions and processes**, including four disparate identity platforms and complex, legacy mainframe-based access certification processes. These inefficiencies resulted in excessive operational costs for IAM and delays, confusion, and an overall poor user experience for access provisioning requests and certifications.

Solution

- **Co-created business case for change:** engaged with key stakeholders to co-create the vision, business case, and roadmap for transformational change and ongoing management. Translated technical opportunities into business impact to gain C-suite buy-in
- **Rationalized and modernized single identity platform; centralized and automated governance function:** deployed a new Omada IGA platform and new responsive user interface. Gradually discontinued four legacy platforms. Migrated legacy functionality and applications into the Omada platform, while consolidating and automating governance. Developed assets for expedited app onboarding of apps via assets

Impact

- **Reduced identity operational costs by 30%** and enabled further cost reductions from the rationalization of both technology and processes
- **Enabled a simplified user experience** with a responsive user interface that can easily be enhanced to align with new business requests
- **Reduced risk exposure** by sunsetting four disparate legacy platforms, **centralizing identity and access functions into one modern platform**, and streamlining the onboarding of hundreds of applications

Case study 2

Accenture transformed three stand-alone IAM tools into a single platform that enhances user experience and provides stronger controls at reduced cost

Client: A large US utility company

Business challenge

The client was facing **productivity loss/delays, high operational costs, poor monitoring, and governance issues** in providing access to their employees to business applications. The employees of the company accessed business applications including the PeopleSoft HR management system, Salesforce CRM solution, billing, and other financial applications. The challenges were due to **multiple access management tools** (Oracle Identity Manager PS2, PS3, and Sun Identity Manager) and **the associated support teams**.

Solution

- Replaced Sun Identity Manager, Oracle Identity Manager PS2, and Oracle Identity Manager PS3 with a centralized SailPoint Identity IQ solution
- Implemented a password self-service solution to enforce security measures, which reduced the number of service requests to the helpdesk by 50%
- Enabled user access certification/validation periodically using SailPoint IIQ
- Implemented stronger controls for access to sensitive privileged accounts / SailPoint IIQ administrators

Impact

- Reduced IT operational cost from US\$1.1 million to US\$700,000 (**36% reduction**) by moving to SailPoint Identity IQ IAM solution
- Reduced new joiner **onboarding time by 40%**
- Implemented **stronger controls for access** to sensitive privileged accounts, protecting the client's systems from serious harm and meeting **regulatory/audit commitments**

Accenture profile (page 3 of 5)

Solutions, partnerships, and investments

NOT EXHAUSTIVE

Proprietary solutions (representative list)

Solution name	Details
Automated Application Onboarding Accelerator	Enables organizations with self-service applications to onboard onto a wide variety of IAM tools, thereby significantly reducing application onboarding time while reducing risk through automation
Autonomous Identity	Patented analytics and ML solution analyzes enterprise access controls and makes recommendations; licensed/sold through partner ForgeRock
Cloud IGA Accelerator	Modular, pre-built reference architectures, data models, and integrations to enable cloud-based IGA for large, highly-complex organizations
IAM Modernization Toolkit	Contains a unique methodology and artefacts to migrate organizations' older IAM technology and processes onto modern IAM solutions that are either self-hosted in organizations' public/private cloud, self-hosted in Accenture's Cloud platform and provided as a Managed Service Provider (MSP), and/or SaaS focused. Accenture has built this methodology, services, and accelerators in partnership with SailPoint, CyberArk, ForgeRock, Saviynt, and Ping
Velocity Identity Program	Contains a unique set of build and deploy artefacts, automation components, and pre-configured accelerators to enable rapid IAM capabilities, including PAM

Partnerships (representative list)

Partner name	Details
CyberArk	Partnership for PAM and other identity security implementations and operations secure the client's most critical credentials
Delinea	Partnership for PAM and other identity security implementations and operations to secure the client's most critical credentials
ForgeRock	Digital identity and autonomous identity services
HashiCorp Vault	Partnership to deliver comprehensive secrets management across a multi-cloud infrastructure to provide static and temporary secrets integrated into Terraform policies
Microsoft	Strengthen the ability to detect, prevent, and respond to infrastructure threats (networks, clouds, endpoints, mobile, and IoT)
Okta	Design and implement access management authentication and authorization-focused services that are capable of securing client environments and experiences
One Identity	Design and implement IAM, PAM, and Active Directory Security services capable of securing client environments and experiences
Ping	Design and implement IAM services capable of securing client environments and experiences

Accenture profile (page 4 of 5)

Solutions, partnerships, and investments

NOT EXHAUSTIVE

Partnerships (representative list)	
Partner name	Details
PlainID	Partnership to provide centralized, fine-grained access controls and Policy-based Access Controls (PBAC) for application, data, and microservices authorization
SailPoint	Design and implement identity and access management (IAM) services capable of securing client environments and experiences
Saviynt	Design and implement identity governance services capable of managing the lifecycle, provisioning, and access request and recertification process for an organization’s workforce
Sonrai	Partnership to provide clients with a capability to reduce risk across cloud identities through use of the Cloud Infrastructure Entitlement Management product.

Other investments (representative list)	
Investment name	Details
Others: ForgeRock	Since 2019, both Accenture and ForgeRock have invested capital in differentiating services in the market, which include building and bringing to market autonomous identity, the IAM modernization toolkit, deployment methods, and DevOps infrastructure deployment toolkits and test automation. The investment also provides training and certification enablement, marketing events and thought leadership, and dedicated and billable go-to-market Accenture leaders to drive services into the market.
Others: CyberArk	Since 2021, both CyberArk and Accenture have invested capital in differentiating services in the market, which include the IAM modernization toolkit, deployment methods, account and application onboarding automation, privileged account discovery tool, and test automation. The investment also provides training and certification enablement, marketing events and thought leadership, and dedicated and billable go-to-market Accenture leaders to drive services into the market.
Others: Saviynt	Since 2022, Saviynt and Accenture have invested capital in differentiating services in the market, including the IAM modernization toolkit, deployment methods, application onboarding automation, and test automation. The investment also provides training and certification enablement, marketing events and thought leadership, and dedicated and billable go-to-market Accenture leaders to drive services into the market.
Talent: Training	Accenture has invested over 100,000 hours in vendor-led training and certification with its leading partners and its own Accenture IAM schools. It has also invested effort and capital in three core Accenture training schools. The first school is IAM Basics, which teaches what IAM is, how it delivers IAM, and how it runs through client scenarios. The second school is the IAM Solution Architect school, where the more senior resources learn how to create an IAM solution based on its previous client experiences. The third school is the IAM Sales school, which teaches the senior leaders in IAM, Accenture Security Account Leads, and other cybersecurity leaders on how Accenture sells IAM services to clients, including creating a solution with mock and previous client scenarios. Over 500 people participate in these schools every year.

Accenture profile (page 5 of 5)

Everest Group assessment – Leader

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Enterprises considering user experience as a critical parameter in their IAM journey should consider Accenture because of its focus toward human-centric design
- Enterprises looking for centralized IAM services will find Accenture to be a good fit given its modernization toolkit integrated well with hybrid, self-hosted, and SaaS-based IAM technology providers
- Clients have appreciated Accenture for its ability to deliver complex IAM engagements and its deep domain and technical expertise. They see it as a strategic partner in cybersecurity
- Enterprises looking to reduce IAM implementation time through automation will benefit from Accenture's investments in building dedicated IP for automated application migration and onboarding to IAM tools
- Enterprises searching for decentralized identity capabilities should consider Accenture as it has end-to-end expertise to design, build, and run decentralized identity programs

Limitations

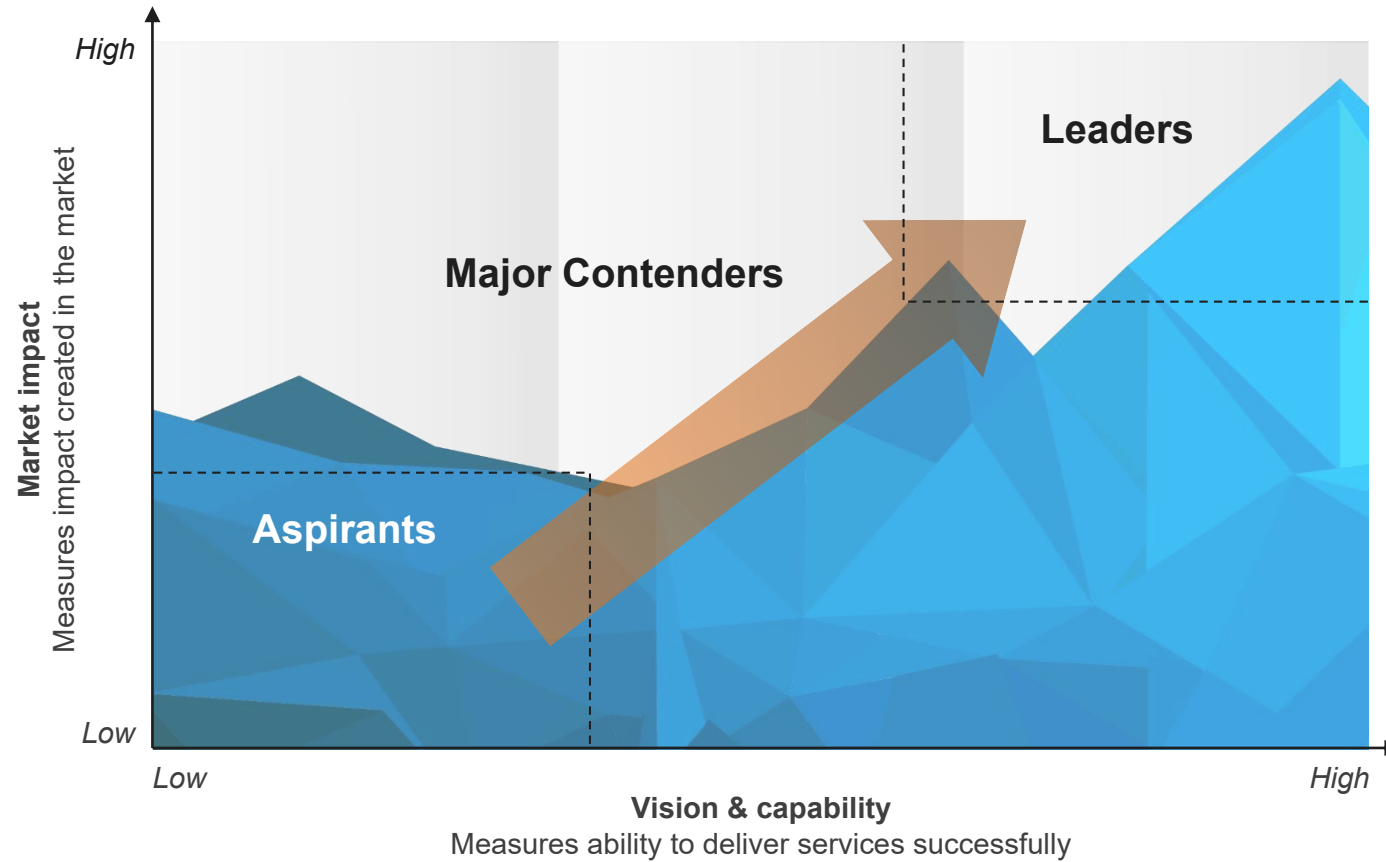
- Accenture has strong delivery capabilities across the entire life cycle of IAM services, but there are limited proof points in next-generation IAM areas such as Identity Threat Detection and Response (ITDR)
- Despite being lauded by clients for its breadth of security offerings and its expertise, some clients have raised concerns about its premium pricing and contractual flexibility
- A few clients have highlighted that Accenture needs to focus coordination of multiple teams spread across different regions while working on global IAM engagements
- Some clients have raised concerns about high attrition and Accenture's ability to allocate new resources with the same level of expertise
- Small buyers need to be aware that Accenture is more focused on large-scale clients for IAM services

Appendix

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



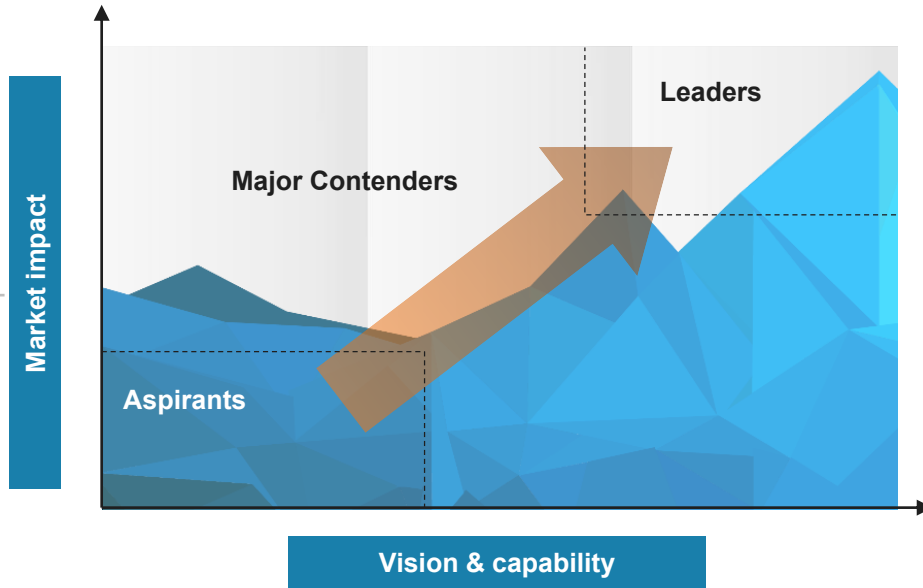
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



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 subsegments/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 takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results 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 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 the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for 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 Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. 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 and to serve enterprises' future expectations.



Everest Group®

With you on the journey

Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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