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Everest Group Cloud Security Services PEAK Matrix® Assessment 2023

Focus on TCS
December 2023

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MATRIX®

Introduction

The surge in next-generation security threats has left enterprises worldwide grappling with cybersecurity challenges. As more and more enterprise move to cloud and enterprises' cloud real estate expands, cloud security becomes a key focus area as well as a critical concern for enterprises. Enterprises across the globe are in search of reliable cloud security service providers that can offer highly tailored, end-to-end cloud security service across their cloud environment with access to skilled cloud security subject matter experts (SMEs). This approach ensures not only compliance with various regional regulations but also adherence to local data privacy laws. A robust cloud security services 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, cloud security service providers are expanding their capabilities to meet these diverse demands. There is also a marked drive to enhance their cloud security services capabilities in order to be recognized as a holistic security partner that can provide end-to-end cloud security services across the complex hybrid multi-cloud infrastructure. Service providers are increasingly taking productized service offerings such as secure access service edge (SASE), cloud security posture management (CSPM), cloud access security broker (CASB), cloud workload protection management (CWPM), cloud native application protection platform (CNAPP), cloud infrastructure entitlement management (CIEM), and security orchestration, automation, and response (SOAR) to enterprises. This research on cloud security service providers thus seeks to shed light on their evolving capabilities and go-to-market (GTM) strategies.

In this research, we present an assessment and detailed profiles of 18 cloud security service providers featured on the Cloud 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 cloud security service providers, client reference checks, and ongoing analysis of the cloud security services market.

The full report includes the profiles of the following 18 leading cloud security providers featured on the Cloud Security Services PEAK Matrix® Assessment 2023:

- **Leaders:** Accenture, HCLTech, TCS, and Wipro
- **Major Contenders:** Capgemini, Cognizant, Deloitte, DXC Technology, Eviden, Fujitsu, Infosys, IBM , LTIMindtree, and NTT DATA
- **Aspirants:** GAVS Technologies, Inspira Enterprise, Mphasis, and Zensar

Scope of this report

Geography
Global

Providers
18

Services
Cloud Security

Cloud Security Services PEAK Matrix® characteristics

Leaders

Accenture, HCLTech, TCS, and Wipro

- Leaders strive to stay ahead of the curve in the ever-evolving cloud security landscape by building expertise around various cloud security segments and offering end-to-end cloud-agnostic security services, further augmented through a comprehensive solutions portfolio to gain the trust and confidence of enterprises
- These providers diligently focus on modernizing and transforming the cloud security landscape of enterprises through a highly balanced portfolio and steadfast commitment to investing in technology and service development, including IP toolkits, accelerators, and frameworks
- Leaders have invested in talent development through tailor-made learning and development programs, external hyperscaler-specific certifications and skilling, and employee wellness programs
- Leaders exhibit remarkable proactiveness in bringing innovations and next-generation services offerings to their clients, leveraging platformized approach embedded with automation, and offering security by design, SASE, DevSecOps, confidential computing, generative AI, and industry-specific services, to name a few

Major Contenders

Capgemini, Cognizant, Deloitte, DXC Technology, Eviden, Fujitsu, Infosys, IBM, LTIMindtree, and NTT DATA

- These participants pose formidable competition to the market leaders, showcasing remarkable market impact through Year-over-Year (YoY) growth and delivering substantial value to cloud security clients. Moreover, they have successfully established significant capabilities to provide comprehensive cloud security 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, with limited end-to-end cloud security offering maturity, which is evident in the scale of market impact they have achieved

Aspirants

GAVS Technologies, Inspira Enterprises, Mphasis, and Zensar

- The cloud security business of Aspirants is currently in its early stages and does not serve large, very large, or mega clients in the same domain
- These providers are proactively expanding their capabilities in the cloud security space. They are accomplishing this by building strategic security services for each hyperscaler as well as by developing IP-led solutions to serve their clients' needs. They still lack a well-rounded and comprehensive portfolio of platformized solutions and have limited capability maturity

Everest Group PEAK Matrix®
Cloud Security Services PEAK Matrix® Assessment 2023 | TCS is positioned as a Leader

Everest Group Cloud Security Services PEAK Matrix® Assessment 2023[1]
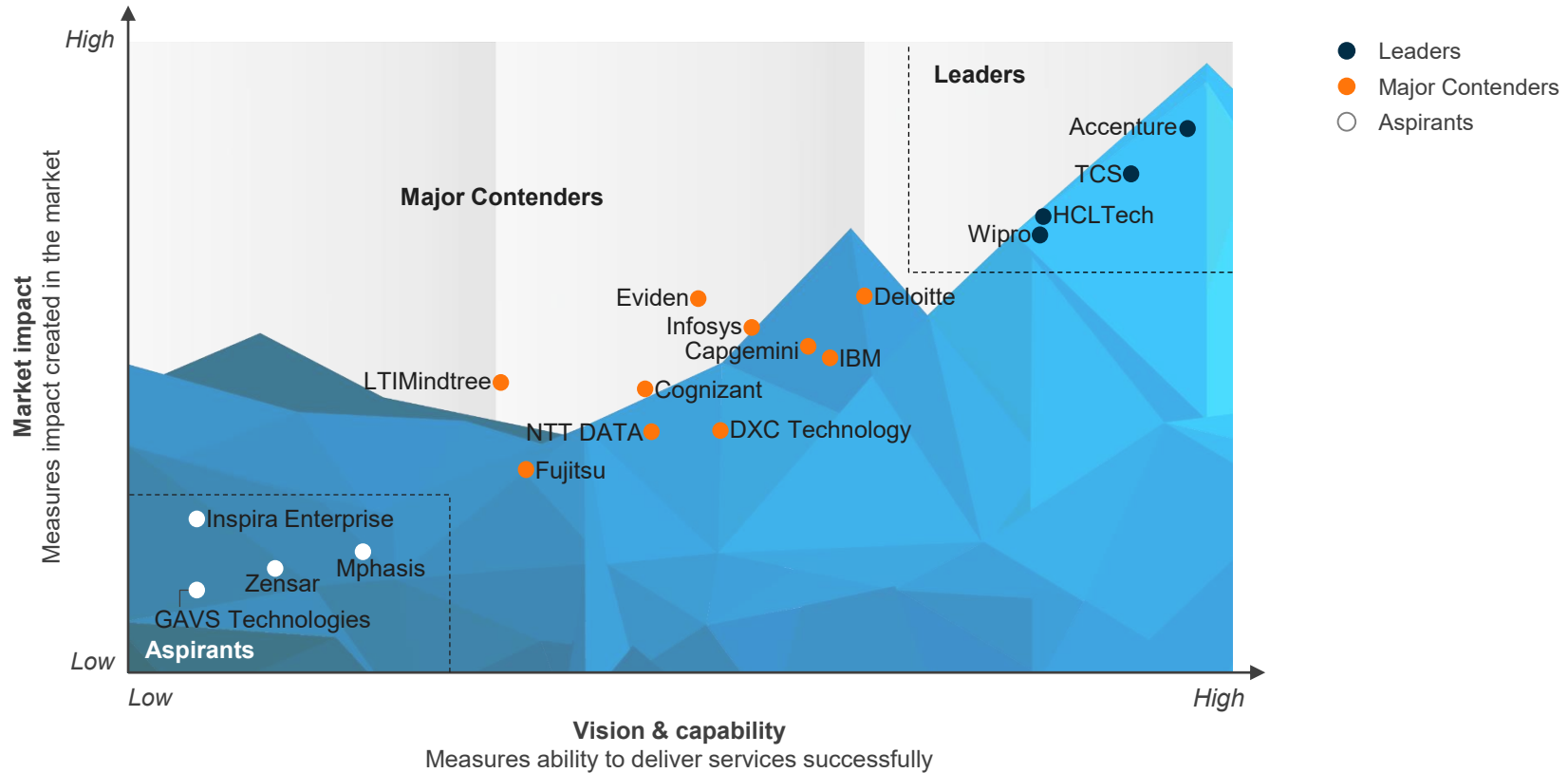
1   Assessments for Deloitte, DXC Technology, and IBM excludes provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyer
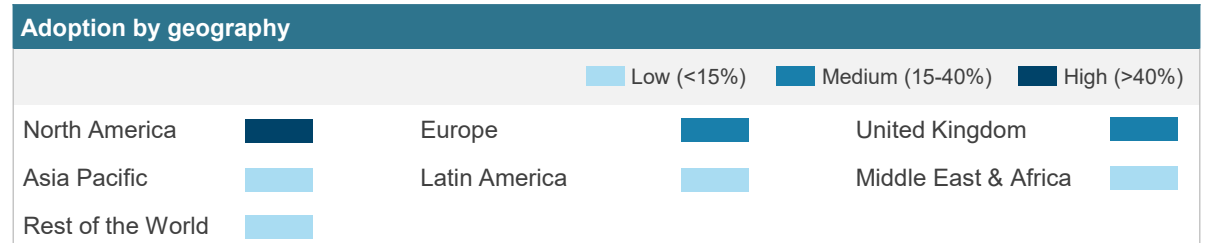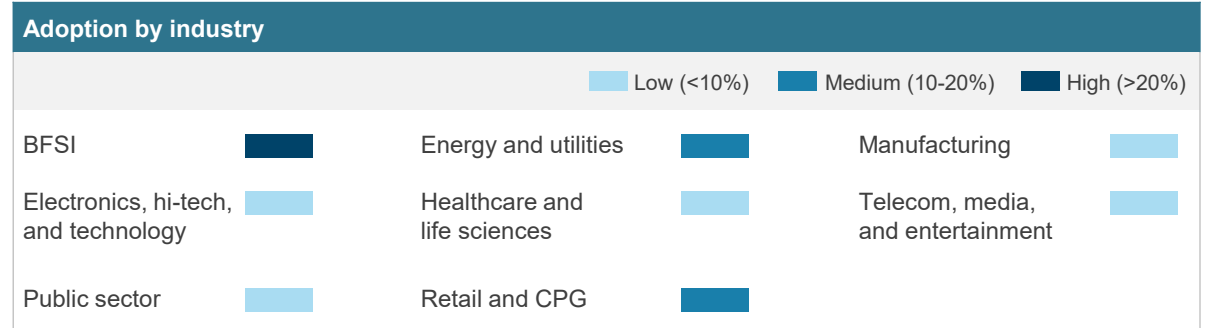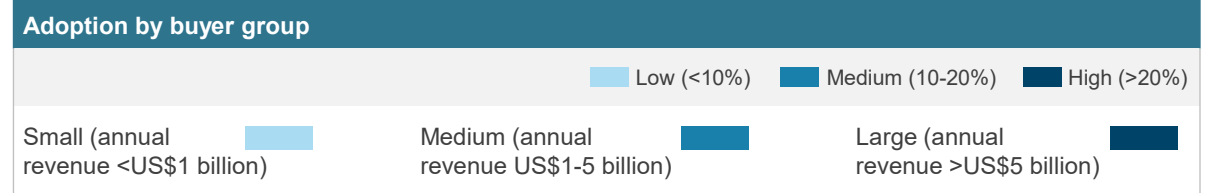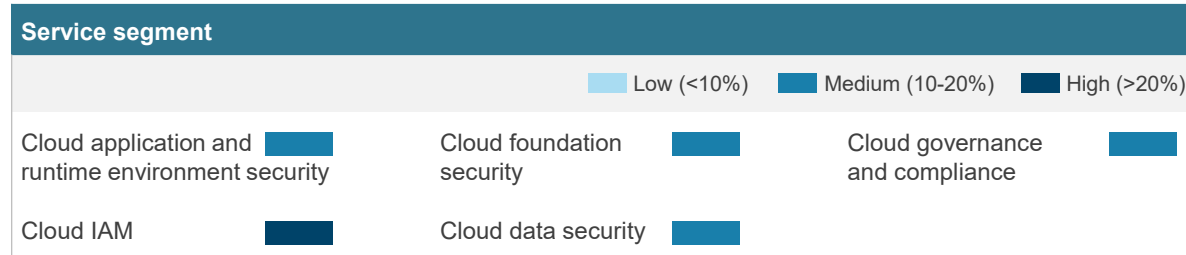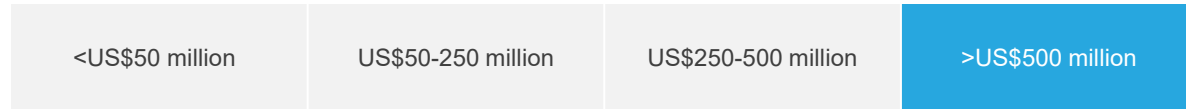Source: Everest Group (2023)

TCS profile (page 1 of 7)
Overview

Vision

TCS' aspiration is to evolve into a trusted security partner of choice for multi-horizon cloud security for customers venturing into a digital transformation journey, ensuring the security of their organizations. Dedicated to this goal, TCS employs best-in-class security solutions and leverages forward-thinking, cutting-edge, innovative, and next-generation technology to align with business priorities. In its commitment to staying at the forefront, TCS continues to invest in and fortify its network of organizations, people, cloud-focused business units, and partners, maintaining its status as a relevant and top-tier strategic partner.

Cloud security services revenue (2022)

<US$50 million	US$50-250 million	US$250-500 million	>US$500 million

Service segment

Low (<10%) Medium (10-20%) High (>20%)

Cloud application and runtime environment security	Cloud foundation security	Cloud governance and compliance
Cloud IAM	Cloud data security	

Adoption by buyer group

Low (<10%) Medium (10-20%) High (>20%)

Small (annual revenue <US$1 billion)	Medium (annual revenue US$1-5 billion)	Large (annual revenue >US$5 billion)

Adoption by industry

Low (<10%) Medium (10-20%) High (>20%)

BFSI	Energy and utilities	Manufacturing
Electronics, hi-tech, and technology	Healthcare and life sciences	Telecom, media, and entertainment
Public sector	Retail and CPG	

Adoption by geography

Low (<15%) Medium (15-40%) High (>40%)

North America	Europe	United Kingdom
Asia Pacific	Latin America	Middle East & Africa
Rest of the World		

TCS profile (page 2 of 7)
Case studies

NOT EXHAUSTIVE

Case study 1	Designed and deployed Azure security for a leading domestic appliances company

Business challenge

The client lacked effectiveness and efficient replication of its on-premises security policies in the cloud environment, particularly on Azure. It needed to regulate user access to Azure services, applications, and data, while ensuring user validation when organization devices were lost. It sought to deploy user and device identity through cloud.

Solution

TCS used a consultative approach to user lifecycle management and identity governance, engaging and collaborating with the client team. The approach entailed assessing the existing environment and migrating users from the previous environment to AAD. TCS designed and implemented MFA, CAP, PIM, SSPR, identity protection, SSO, identity governance, RBAC, AAD monitoring, and external identities. The solution aided in integrating the HR software with Active Directory via AAD. TCS also implemented continuous access evaluation procedures for access token evaluation.

Key benefits
- Enabled centralized user and services access management
- Enabled access to SaaS and internal applications
- Enabled use of BYOD with restricted access
- Enabled just-in-time access
- Provisioned AWS users and group through AAD
- Optimized BAU cost

Case study 2	Enabled cloud security automation and policy-as-code implementation for a leading supply chain company

Business challenge

Insecure infrastructure provisioning in production environments caused weaknesses in cloud security owing to resource configuration in a variety of ways using Google Cloud. Although automation with Terraform as part of the infrastructure boosted the speed of deploying cloud resources, the old process ignored cloud security practices. The client required a security solution to detect and prevent non-compliant resource configuration prior to deployment.

Solution

TCS created over 100 policies to enable the codification of policies that automate security testing by stopping unsafe infrastructure before it entered production, ensuring the cloud environment remained secure and the danger landscape was reduced. The solution aided in the development and deployment of cloud security policies by utilizing HashiCorp Sentinel (policy-as-code framework) and Terraform cloud to check and enforce resource settings in tandem with industry best practices and company-wide rules.

Key benefits
- Built-in security through object-level codification of cloud protection rules
- Reduced time-to-market for new product launches and features
- Identified, created, and deployed Google Cloud security rules based on CIS standards and proactive consideration of cybersecurity best practices

TCS profile (page 3 of 7)
Offerings

Proprietary solutions (representative list)	
Solution name	**Details of the solution/tool**
Cyber resilience framework	It helps realize maturity of the security function with increasing automation and industrialization based on NIST, ISO 27001, and SANS guidelines.
Cloud security framework	TCS cloud security framework is compliant with security standards and best practices (CSA, NIST, and TCS recommendations).
Co-creation labs	Cloud security garage, vertical-led blueprints and accelerators, and co-innovation network.
TCS cyber défense suite (cyber protection)	It is a cloud security service construction that includes assessment, build, migration, and operational services.
Cloud security readiness assessment and migration checklist	It helps in adding more maturity assessment templates, cloud migration profiling, and compliance assessments to the pre-built solution library.
Cloud security development and readiness	This solution offers industry-specific use cases for multi-cloud security, including continuous compliance monitoring, auto-remediation, and proficiency in integrating third-party tools, demonstrated through capabilities in a readily available lab environment.
TCS Cloud Mason	It builds a cloud foundation to create a scalable and efficient landing zone, as well as rapidly specifies, constructs, and deploys cloud foundational platforms using numerous cloud providers.
Cloud migration factory (MasterCraft™)	It is an intelligent automation product designed to speed up software development, modernization, and service delivery while ensuring data management trust.
Cloud Value Measurement Model (CVMM)	The model helps in cloud value measurement across various stages of cloud and application modernization.
TCS cloud exponence	It aids in the resolution of operational issues in AWS Systems Manager via AWS OpsCenter. It offers a centralized management service for viewing, investigating, and resolving operational work items involving AWS resources. This aids in the consolidation and standardization of operations across services while also providing contextual investigation data.
Cloud secure platform – assessment	The solution helps to benchmark cloud security maturity against industry standards, such as CSA and NIST, and check security configuration hardening against CIS standards.
Cloud secure platform – cloud security foundation build	It comprises security configuration blueprints, cloud guardrails policy enforcement, multi-cloud security policy enforcement using policy as a code, shift left, shift right, and native security.
Cloud secure platform – cloud security migration	It helps to assess the existing condition of environmental security and preparation, assurance of the migration program, and post-migration validation.

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TCS profile (page 4 of 7)
Offerings

Proprietary solutions (representative list)	
Solution name	**Details of the solution/tool**
Cloud secure platform – cloud security operations	It assists in monitoring security and compliance, orchestrating and automating reaction, and reporting executive and operational KPIs.
TCS Intelligent Cloud Migration Continuum (iCMC™)	It assists customers in developing business cases and making informed decisions about which cloud to use and which apps to target for cloud migration and modernization as part of their digital transformation journey.

TCS profile (page 5 of 7)
Partnerships

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Partnerships (representative list)		
Partner name	**Type of partnership**	**Details of the partnership**
Microsoft	Strategic – MSP/resell	Partnered to provide various security options as part of Azure cloud and M365, which may be extended to hybrid and multi-cloud. IAM, data, and MDR are three of the most important collaborative solution domains.
Google	Strategic – MSP/resell	Partnered to deliver MDR, threat advisory, zero trust, and native cloud security.
Amazon	Strategic – MSP/resell	Partnered to deliver multiple native security measures as part of AWS cloud across data, network, identity, workload, and monitoring.
IBM	MSP/resell	Partnered to provide native security for the IBM cloud; IBM security integrates seamlessly and provides security for various data, identity, and MDR services across multi/hybrid clouds.
Oracle	MSP/resell	Partnered to deliver native security services across many tiers.
Sysdig	Strategic – resell	Partnered to provide a comprehensive portfolio that includes the majority of CNAPP capabilities and is in high demand among customers.
Palo Alto Networks	MSP	The partnership focuses on CSPM, CWPP, CIEM, code security, and network security, which are popular with Prisma Cloud offerings across enterprises.
Aqua Security	NDA	Partnered to create a complete portfolio that covers the bulk of CNAPP capabilities, and it sees demand across its customer base.
Zscaler	Strategic – MSP	Partnered to expand portfolio in cloud security as part of its acquisition and development strategy.
Netskope	NDA	The partnership, which focuses on SaaS security, allows a market-leading CASB offering with CSPM and SSPM.
AppOmni	NDA	The combined product is focused on SaaS security posture management.
Lacework	NDA	Partnered to enable a complete portfolio encompassing the majority of CNAPP capabilities and seeing demand throughout the customer base.
Wiz	NDA	Partnered to provide security services that cover the bulk of CNAPP features and is in high demand among customers.
Securitii	Initiated	Partnered to provide a complete data security offering that expands across several clouds.
Rapid 7	Resell	The combined solution, which specializes in vulnerability management, has entered the cloud security posture management market.

TCS profile (page 6 of 7)
Investments and recent activities

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Investments and recent activities (representative list)	
Themes	**Details of the investment**
Talent	TCS is committed to developing a skilled pool of cloud security experts on leading hyperscaler platforms and other SaaS platforms. It has 100+ courses in digital learning platforms for capability enhancement and cross-skilling. It has focused learning path and certification enablement to benchmark competency upskilling.
Innovation	• **Cloud security garage:** TCS provides specialized cloud security labs to help customers conceptualize, define, and develop use cases in the form of proof of concepts and demos. Joint labs with Microsoft, Google, and AWS that provide privileged access to its preview products as well as access to its lab setups to test and assess goods depending on market demands • **Cloud security Centre of Excellence (CoE):** CoEs assist in providing competitive analysis of the product, identifying niche and upcoming domains to create point of views, developing reusables & accelerators, standardizing frameworks, developing partnership, GTM, offerings based on market demand, focusing on research and Innovations specific to cloud security industry challenges, and developing reusables & accelerators • Cloud security solutions and delivery centers for accelerating delivery and sharing best practices across worldwide engagements
Others	Associated with industry organizations such as the Cloud Security Alliance (CSA), NIST, and CIS.

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TCS profile (page 7 of 7)
Everest Group assessment – Leader

Measure of capability: ◔ Low ● High

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 looking for environment-agnostic cloud security solutions and capabilities will benefit from TCS' Multi-cloud Data Security Framework, end-to-end platforms such as Cyber Defense Suite (CDS), and a robust partnership ecosystem

- Enterprises will benefit from TCS' strategic approach toward cloud security that is enabled through its multi-horizon transformation approach, shift-left delivery, and investments in next-generation cloud security themes such as quantum resilience, SASE, and DevSecOps

- Enterprises looking for mature posture management services will find TCS a good fit due to its mature and automation-enhanced cloud-secure platform for CSPM

- Enterprises looking for an industry-focused cloud security solution suite will find TCS suitable because of its wide coverage with industry-specific solutions such as Security for the Telco Cloud and Cloud Compliance Management for Retail and Healthcare

- Clients have acknowledged TCS' ability to provide skilled senior SMEs with better design and scoping capabilities, leading to a strong development plan in cloud security

Limitations

- Enterprises looking for Microsoft-specific cloud security capabilities need to carefully assess TCS as it is yet to receive the Microsoft specialization tag for cloud security

- Despite having good industry-specific solutions, public sector enterprises can be mindful of TCS' presence because it lacks market mindshare and credible proof points compared to peers

- Despite its breadth of platformized security solutions, a few clients have flagged concerns regarding TCS' proactiveness in pitching its in-house solution platforms

- A few clients have highlighted that TCS needs to improve its ability to proactively bring forward new and innovative solutions and IP to improve the next-generation cloud security offerings

- A few clients have highlighted that TCS needs to improve its ability to manage talent by better aligning resources in the initial delivery phase

Appendix

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

Everest Group PEAK Matrix
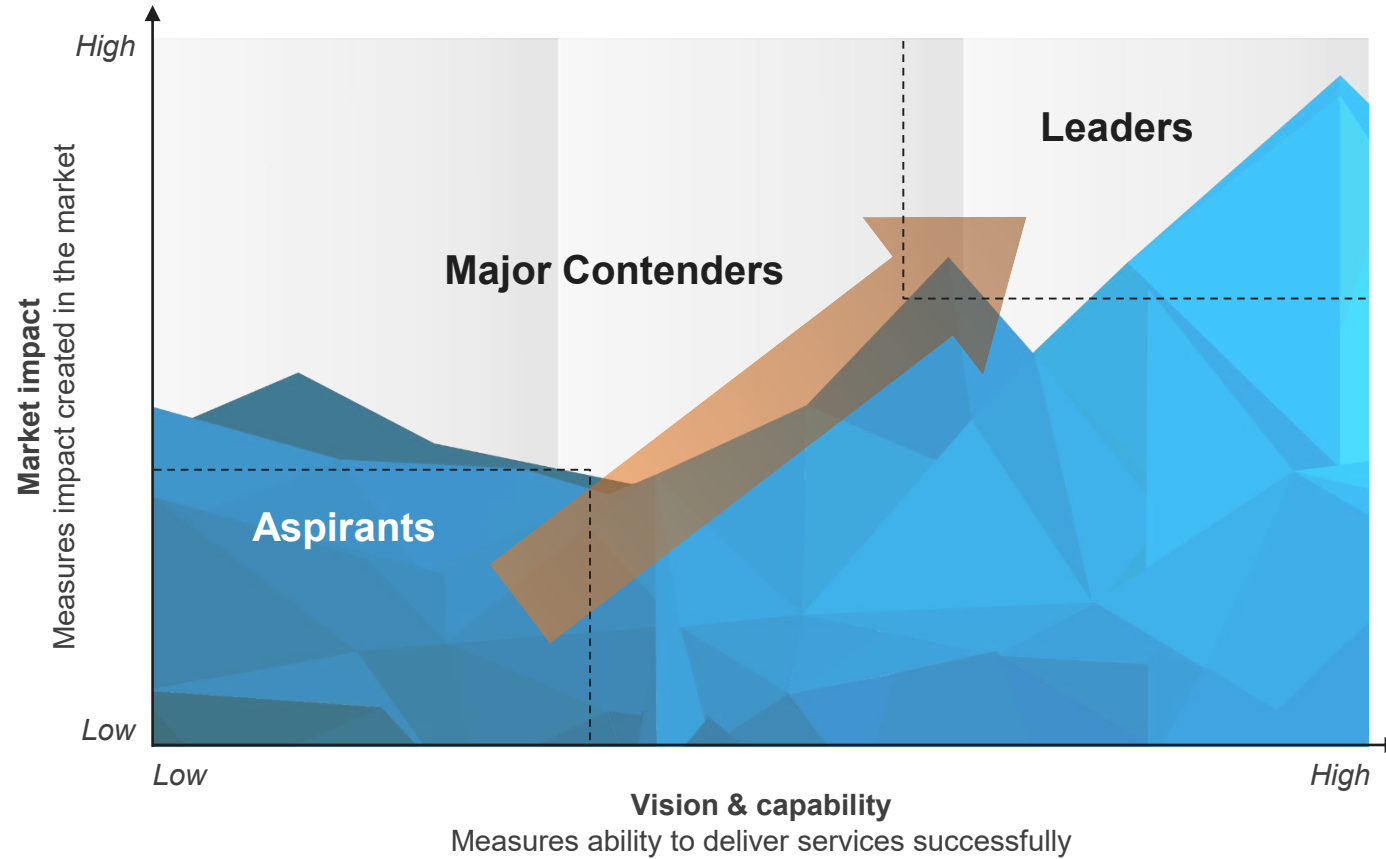
Services PEAK Matrix® evaluation dimensions

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

Market impact

Leaders

Major Contenders

Aspirants

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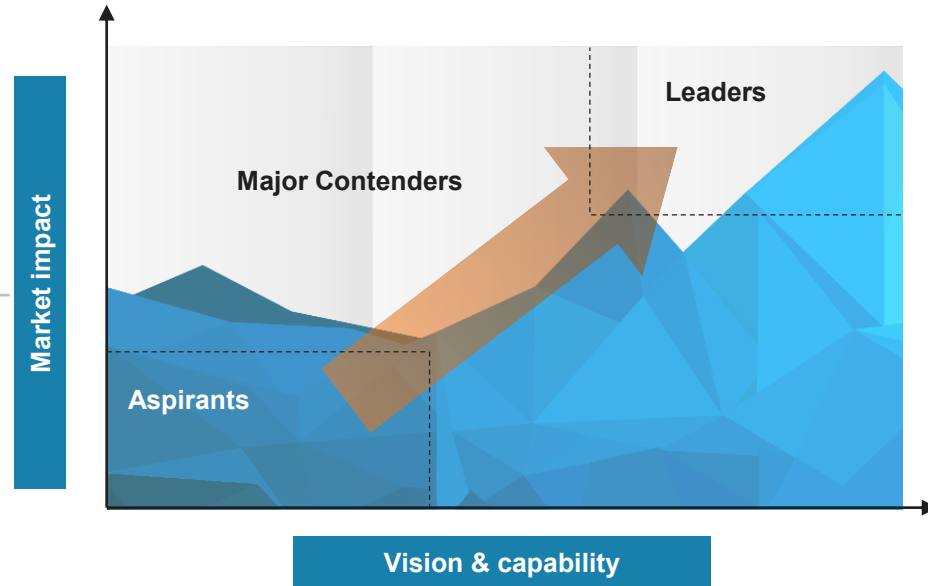
Measures ability to deliver services successfully.
This is captured through four subdimensions

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 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 in 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.

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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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