Magic Quadrant for Identity Governance and Administration

12 January 2015 | ID:G00261633

Analyst(s): Felix Gaehtgens, Brian Iverson, Steve Krapes

Summary

The IGA market is transforming legacy, on-premises IAM products. IGA vendors are investing heavily to meet client needs in ease of use, mobility, business agility, and lower total cost of ownership. User provisioning and access governance functions continue to consolidate.

Strategic Planning Assumptions

By 2018, 30% of organizations will have replaced more than 50% of manual access certification and request approvals by automated intelligent policies driven by analytics.

By 2018, 40% of IGA vendors will provide preconfigured business process frameworks to ease deployment for small to midsize organizations, up from less than 10% today.

Market Definition/Description

Identity governance and administration (IGA) solutions manage identity and access life cycles across multiple systems. Core functionality includes automated provisioning of accounts among heterogeneous systems, fulfillment of access requests (including self-service), password management, governance over user access to target systems via workflows and automated policies, and access certification processes. Additional capabilities often included in IGA systems are risk scoring of a user's combined entitlements, segregation of duties (SOD) enforcement, role management, role mining, audit case incident management, and analytics (historical change, performance, recommendations for entitlements or certifications, and so on).

Vendors in this Magic Quadrant are rated based on their on-premises solutions, but many also have solutions that are delivered as identity and access management as a service (IDaaS) cloud solutions or leverage third parties to host cloud solutions. Clients looking for SaaS-centric or cloud-only solutions should consult Gartner's "Magic Quadrant for Identity and Access Management as a Service."

A key aspect of understanding the future of the IGA market is knowing how digital business will influence IGA systems and practices over the near and long term. Gartner believes digital business will lead to adoption of bimodal IT— and bimodal IAM. Bimodal identity and access management (IAM) means running systems in two modes: one that is "built to last," and one that is "built to adapt" to a constantly disruptive technology environment. The adaptive mode will require IGA technology that is more agile and flexible, and facilitates innovation more rapidly.

Magic Quadrant

Figure 1. Magic Quadrant for Identity Governance and Administration


EMC (RSA)
SailPoint
Oracle
IBM
Courion
Dell
Hitachi ID Systems
NetIQ
Beta Systems
CA Technologies
Omada
SAP
AlertEnterprise
Evidian
Fischer International
The Dot Net Factory
Avatier
Atos
Identity Automation
NICHE PLAYERS
VISIONARIES
ABILITY TO EXECUTE
COMPLETENESS OF VISION
As of January 2015

Source: Gartner (January 2015)

Vendor Strengths and Cautions

AlertEnterprise

California-based AlertEnterprise offers its flagship Enterprise Guardian suite of products that has the ability to extend beyond traditional IAM for logical assets toward areas of physical security and operational technology (OT), including visitor management, badging, and real-time interfaces to supervisory control and data acquisition (SCADA) industrial control systems. The platform also includes threat and risk behavioral analytics by combining identity information with user activity feeds, such as access to internal computer systems outside of an employee's work hours.

The AlertEnterprise platform has a range of vertical offerings aimed at oil and gas, utilities, chemicals, pharmaceuticals, and other regulated industries that make up a large percentage of its customer base — followed by airports and governments. The majority of its customers manage between 5,000 and 25,000 users (the average is 7,000).

STRENGTHS

- Its product excels at managing an entitlement catalog with value-added metadata and provides full support for the key product scenarios from the evaluation criteria listed below.
- A clear focus on the integration of IAM and OT gives AlertEnterprise a unique standing among all vendors in the IGA market.
- Fifty-five percent of its staff work in R&D, enabling the company to innovate quickly, as evidenced by the recent release of compliance content packs for NERC CIP V5 and TSA Telos credentialing systems.

CAUTIONS

- AlertEnterprise needs to grow its limited partner network in order to increase delivery capacity and sales that have been growing but lately have tapered off to a rate well below the industry average of 15% annual growth.
- Customer satisfaction with support and maintenance is below the average for vendors in this Magic Quadrant, but positive overall.
- Buyers should be vigilant in verifying that their future IGA plans align with AlertEnterprise's road map, because it is focused on IT/OT integration rather than more general IGA trends.

Atos

Atos, headquartered in France, has an IGA division in Germany producing DirX Identity and Access Management. The DirX products appeal to organizations with complex IT environments or unique vertical requirements that are looking for a turnkey solution or for Atos to provide a managed service.

Its customer base is made up of many verticals, with the largest being government at over 25%, manufacturing and natural resources at 20%, and healthcare at 15%. The majority of its customers manage between 25,000 and 1 million users (the average is 375,000) and automated provisioning to between six and 50 targets.

STRENGTHS

- Atos is highly focused on providing IGA solutions that are specialized for the needs of different vertical industries.
- A majority of reference customers ranked DirX as strong in flexibility, scalability, connector support and stability.
- It is one of a few vendors to feature physical and logical security integration, as well as IT and OT integration, in its product strategy.

CAUTIONS

- Atos recently acquired Bull, which owns Evidian, so Atos is now in possession of two IGA products with significant overlap. Clients are strongly advised to seek clarity from Atos on product road maps.
- It does not have distinctive marketing for its IGA products and has low visibility in the general market.
- Its user interface and workflow processes use a mix of different technologies: Tcl, Java and JavaScript, making the product more difficult to maintain.

Avatier

Avatier, based in California, offers the Avatier Identity Management Suite (AIMS) with multiple, separately licensed modules. AIMS is a good fit for organizations with limited resources that emphasize simplicity and automation through self-service. The product extends the IAM self-service interface, workflow and governance capabilities to a more general service catalog to let users request, govern and administer other assets beyond accounts and permissions, such as computers, office supplies, and so on.

Avatier's customers are diversified across industry verticals. Manufacturing and natural resources, followed by healthcare and education are the strongest sectors. The majority of its customers manage between 3,000 and 50,000 users (the average is 15,000) and provision between one and five target systems.

STRENGTHS

- Avatier remains a nimble IAM player that is broadening its suite without losing focus on usability, fast time to value and ease of maintenance.
- Its administrative and end-user interface supports 30 languages, including many double-byte Asian languages and nearly every European language, and it has recently opened sales offices in Australia and Singapore, though 80% of its sales are in North America.

- It responded rapidly to mobile market and compliance requirements by offering apps for access request and password management on all major mobile platforms.

CAUTIONS

- It lags behind the average vendor in this Magic Quadrant in bringing IGA features to market, which may be a result of having fewer R&D resources than expected for a company of its size.
- Its IGA channel network is still limited, as most partners resell only Avatier's password reset and single sign-on (SSO) offerings.
- Its product lags behind in capabilities such as the lack of a role-based approach for managing and certifying access entitlements, and scores in the lowest quartile of the "product or service" evaluation criterion.

Beta Systems

Germany-based Beta Systems offers its Security Access Manager Enterprise Identity Manager (SAM EIM) for governance and provisioning functions, and Garancy Access Intelligence Manager (AIM) for analytics. Beta Systems is a good fit for enterprises with complex requirements, and those that need highly customizable environments. Beta Systems' support for managing mainframe security is richer than that of most competing products because SAM EIM's origins were in the mainframe market — however, more than half of its current customers run on nonmainframe platforms.

About three-quarters of its customers are in Europe; the rest are in North America. Most customers service the banking, securities and insurance sectors. Transportation and healthcare follow. The majority of its customers manage between 2,000 and 250,000 users (the average is 27,000) with automated provisioning of between four and 900 target systems.

STRENGTHS

- Beta Systems appeals to clients beyond its traditional financial and insurance sector customer base through effective targeted marketing paired with good market understanding.

- It has invested heavily in IGA over the past year and is progressing well on a technology refresh.
- It has a strong internal focus on quality, and receives high customer satisfaction rankings with product and support and maintenance.

CAUTIONS

- Its geographical reach is limited, and efforts to expand international offices in Europe and North America have yet to yield results.
- SAM EIM's end-user interface is designed for the technical user, not the business user, although a new UI is in the works as part of the technology refresh.
- Beta Systems is closing more deals, but deal size is smaller, causing sales growth to be largely flat.

CA Technologies

New York-based CA Technologies offers the CA Identity Suite that includes the CA Identity Portal as a common user interface for the two distinct products: CA Identity Manager (provisioning) and CA Identity Governance (governance). It is a good fit for organizations emphasizing requirements for access request and role and management.

CA Technologies is a major vendor in the IAM market and offers an extensive suite of enterprise security products. Its customer base spans all major industries — with a particularly deep presence in banking, securities and insurance, government, and utilities. The majority of its customers manage between 10,000 and 200,000 identities, with automated provisioning between two and 2,700 target systems.

STRENGTHS

- It has a global presence and large channel network that enables its IGA products to be sold and deployed worldwide.

- It has made significant investments in its IGA products, including System for Cross-Domain Identity Management (SCIM) connectors for SaaS endpoints, SOAP and REST Web services interfaces, and the CA Identity Portal that centralizes a user's view of entitlement data and provides an intuitive access-request shopping cart experience.
- It stands out for making creative use of social media in its marketing and in getting mainstream media attention.

CAUTIONS

- Its workflow engine is complex to configure, especially when working with requests for multiple resources.
- Reference customers rated it in the lowest quartile in satisfaction for product and support/maintenance — though it is still rated positive overall.
- It has fallen behind in core, on-premises enterprise product capabilities, since its innovation has been focused mostly on supporting consumer identity management and cloud use cases.

Courion

Courion, based in Massachusetts, offers the Courion Access Assurance Suite (AAS), consisting of several modules that can be licensed separately. The Access Insight module can be deployed on top of incumbent IGA solutions from other vendors to provide detailed identity and access intelligence through analytics. Courion has a strong standing with enterprises of up to 25,000 users, and does well in regulated industries with requirements in governance, auditing and analytics.

More than a third of Courion's customers are in healthcare, followed by banking, securities and insurance, and manufacturing and natural resources. The majority of its customers manage between 1,500 and 30,000 users (with an average of 20,000) with automated fulfillment of three to 80 systems. However, some references had significantly higher identity and system numbers.

STRENGTHS

- AAS was the only product to consistently perform well across every product scenario within this Magic Quadrant's evaluation criteria, in contrast with the other vendors' products that each had poor results in several of the evaluated product scenarios.
- Reference customers reported satisfaction with the product, and support is among the highest of all vendors evaluated. All reference customers indicated that they were highly likely to recommend the product to others.
- Its uniquely differentiated marketing message emphasizes analytics for "intelligent" IAM and resonates with customers and prospects.

CAUTIONS

- Some partner relationships have been problematic and have affected its customers.
- Gartner hears frequent complaints about the timeliness and consistency of Courion's delivery of professional services.
- Courion lists more than 350 connectors available for its products, but Gartner clients indicate that Courion has difficulties with the quality of newly developed connectors and with providing maintenance updates in a timely manner.

Dell

Texas-based Dell develops its IGA product, Dell One Identity Manager, in Germany. It is sold in separate editions with different modules. It has a strong following in Europe, where it has been localized in 13 languages. It is a good fit for companies requiring strong governance and deep SAP integration.

Customers' verticals are banking, securities, insurance, communications and media services. The majority of its customers manage between 1,000 and 37,000 identities (the average is 20,000), and most run automated provisioning from one to 10 target systems.

STRENGTHS

- Its product provides very good policy management, contextual information for approvers and certifiers, and workflow rerouting capabilities.
- All reference customers reported that the product was easy to use and had technically proficient out-of-box functionality.
- The Dell Community is a successful forum facilitating interactions between product engineering staff and customers.

CAUTIONS

- Dell has not managed to replicate its European IGA success in other geographies — notably in North America.
- Its reference customers' satisfaction rate with support and maintenance, while still positive overall, is among the lowest of all vendors.
- Several reference customers noted that finding experienced talent for Dell's solution is difficult. Resources from Dell are in limited supply — which has been confirmed by Gartner clients.

EMC (RSA)

Massachusetts-based RSA, the Security Division of EMC, acquired one of the pioneers in the IGA space, Aveksa, last year. RSA Identity Management and Governance (RSA IMG), is offered in modules that are priced and licensed separately. It is a good fit for organizations with heavy governance requirements. RSA has worked hard on an automated fulfillment and provisioning module; however, this is new and not in wide use.

RSA has customers across all major industry verticals, with half of its customers in banking, securities and insurance. The majority of its customers manage between 5,000 and 250,000 identities (the average is 35,000). Only a third of customer references used RSA IMG to automatically provision to target systems — with most provisioning between three to eight targets.

STRENGTHS

- RSA IMG scored above the average across all product capabilities except for identity life cycle and password management — and scores very high in scalability and performance.
- RSA is leveraging its Archer governance, risk and compliance (GRC) and IGA products for upsell opportunities to organizations with heavy compliance requirements.
- RSA is very responsive to market trends and demonstrates one of the highest levels of innovation.

CAUTIONS

- Its ambitious global partner strategy is in the early days of execution, which may strain its professional services delivery capacity in times of high demand.
- Reference customer satisfaction scores are in the lowest quartile among all vendors (though still in positive territory).
- RSA IMG is being sold for prices over the market average.

Evidian

France-based Evidian offers Identity and Access Manager (Evidian I&AM), which includes Web access management (WAM) capabilities and synchronization, policy, provisioning and management modules. Due to its lower integration and maintenance costs, Evidian is a good fit for a range of small and midsize business (SMB) and enterprise clients that need self-service interfaces and workflow automation with modest governance requirements.

Healthcare, banking, securities and insurance account for 50% of Evidian's customers. Government, communications, media and services, manufacturing, and natural resources are strongest with other verticals. The majority of its customers manage between 400 and 20,000 identities and automated provisioning between two and 17 target systems. Some customers have significantly higher identity counts.

STRENGTHS

- Good visibility across media and frequent participation at industry events have grown the brand in relevant markets and verticals.
- It has a strong channel network that is responsible for nearly half of its revenue — and surveyed partners give consistent positive feedback.
- Its responsiveness to market trends, standards and regulatory needs is above average and demonstrates a good market understanding, product strategy and innovation.

CAUTIONS

- Support for access certification and SOD is basic, and the product lacks role mining analytics; role mining is available only via professional services.
- Atos recently acquired Bull, which owns Evidian, so it is now in possession of two IGA products with significant overlap. Clients are strongly advised to seek clarity from Atos and Evidian on product road maps.
- Evidian's products are not used outside EMEA, apart from a limited number of Japanese deployments.

Fischer International

Florida-based Fischer International has a long history with IGA. Most customers are running its Fischer Identity Suite as a service; however, many run this product on-premises. Its offering allows extensive configuration and is appealing to organizations with limited governance requirements that need to manage many external identities.

Fischer International is strong in higher education (nearly 50% in that vertical), followed by manufacturing and natural resources, banking securities and insurance, and utilities. The majority of its customers manage between 1,250 and 250,000 identities (the average is 16,000), with automated provisioning for between five and six target systems.

STRENGTHS

- Reference customer satisfaction ratings for the product and for support and maintenance are among the highest of all vendors evaluated.
- Fischer International's clear and differentiated messaging for higher education creates strong awareness and brand recognition —at the expense of being ignored by many customers in most other verticals.
- Its turnkey higher education offering is quickly deployed and integrates with typical on-campus and cloud-based systems.

CAUTIONS

- Fischer International has no presence outside the U.S. and only a very small number of international partners.
- Buyers should be vigilant in verifying that the vast majority of their business needs are aligned with the product's out-of-the-box capabilities, because Fischer's product strategy emphasizes configuration, with limited support for customized code to integrate nonconforming business processes.
- Limited governance and analytics capabilities make it difficult to establish a footprint in regulated industries.

Hitachi ID Systems

Canada-based Hitachi ID offers the Hitachi ID Identity and Access Management Suite, with several modules that can be licensed separately. It is popular with North American IT buyers who are looking for a flexible account and password management solution with strong support for policy-based administration— and is offered in 17 languages.

The three largest customer verticals include banking, securities and insurance, which account for one-third of the business, followed by manufacturing, natural resources and education. The majority of its customers manage between 5,000 and 25,000 identities, with automated provisioning of between three and 140 target systems. Only 25% of reference customers are using its access certification capabilities.

STRENGTHS

- All reference customers indicated that they were either likely or highly likely to recommend the product to others.
- The product reduces deployment risk and total cost of ownership by providing out-of-the-box reference builds that support typical identity life cycle patterns.
- Hitachi ID provides all options and all connectors in one product, thus avoiding the multimodule purchasing dilemma (buy now or later) that customers face with some other vendors.

CAUTIONS

- By targeting IT buyers only, it risks being overlooked by business decision makers.
- Its end-user interface is a technically efficient display of text and tables that will be acceptable to IT users but may not be appealing to business users.
- It lacks a strong international customer base, as 85% of its customers are in North America.

Identity Automation

Texas-based Identity Automation offers RapidIdentity for self-service and delegation and includes workflow, access requests, access certification, password management, auditing, reporting, group management, and folder/file access management. Identity Automation is a good fit for North American customers who require a solution with automated provisioning, access request and workflow capabilities.

Identity Automation's customers typically buy an IGA system that is configured and/or customized by the vendor via an added cost professional services engagement. Most reference customers are in education and use automated provisioning of up to 10 target systems. The majority of its customers manage between 7,000 and 250,000 identities (the average is 75,000), although there is one notable customer with a significantly higher identity count.

STRENGTHS

- Identity Automation's pricing strategy appeals to the education market, since it counts only full-time employees but not students.
- Reference customers indicate they like the flexible, highly configurable and easy-to-customize products.
- Reference customer satisfaction rates are among the highest of all vendors surveyed. The customers all commented on the strong level of support, ease of use, and flexibility.

CAUTIONS

- The lack of a partner network could impede long-term growth; it is a small, emerging product company that has transformed from a consultancy.
- Its geographical coverage is limited to North America, and its products are only available in English.
- Identity Automation provides reapprovals tied to specific resources but there is no support for creating ad hoc certification campaigns or for identity analytics.

IBM

New York-based IBM offers IBM Security Identity Governance and Administration, a suite that combines IBM

Security Identity Manager (ISIM) with the recently acquired CrossIdeas platform, now named IBM Security Identity Governance. IBM is a good choice for large organizations with complex processes that need automation and governance capabilities — and are willing to invest in significant professional services.

One-fifth of its customers are in banking, securities and insurance, with the rest evenly distributed across all other industry verticals. Most reference customers are managing between 4,500 and 85,000 identities (the average is 27,000), with automated provisioning of between two and 100 target systems.

STRENGTHS

- The CrossIdeas acquisition has reinvigorated IBM's Global Account (IGA) product line, adding some of the most advanced governance capabilities.
- Its large, global presence allows products to be sold effectively everywhere.
- IBM has a very successful, heavily invested channel network. Surveyed value-added resellers (VARs) indicate high partnership satisfaction.

CAUTIONS

- The ISIM business user interface has garnered criticism from Gartner clients, which IBM has started to address, but there is still a large amount of work ahead.
- The integration of CrossIdeas into a harmonious offering will take significant work and time.
- Half of IBM's reference customers mentioned that the product is complex and requires a steep learning curve, which is in line with our interactions with Gartner clients.

NetIQ

Texas-based NetIQ offers its NetIQ Identity Manager with several optional modules, including an Access Review governance component. Additionally, it offers NetIQ Access Governance Suite (AGS), which is a white-labeled version of SailPoint's governance product that is sold and supported by NetIQ under an OEM agreement. Both NetIQ Identity Manager and AGS were evaluated as a combined solution for the purposes of this Magic Quadrant. NetIQ's products should especially appeal to organizations that are looking for a flexible solution that provides the ability to scale over time with strong automation and provisioning capabilities.

Its customers are evenly distributed over multiple verticals, led by government with about one-fifth. The majority of its customers manage between 100 to 50,000 (the average is 7,000) identities, with automated provisioning of between three and 250 targets. Some customers have significantly higher identity counts.

STRENGTHS

- NetIQ is rated highly for support and maintenance by reference customers.
- It has a well-developed, worldwide channel network that provides local experience and helps to sell its products globally.
- Several reference customers — from smaller installations to very large deployments — have commented positively on scalability.

CAUTIONS

- NetIQ does not promote its vertical industry capabilities to their full potential, with differentiated marketing messaging or targeted offerings.
- Without AGS, NetIQ's capabilities for access certification and identity analytics are below the average of other vendors in this Magic Quadrant.
- Rather than offering a library of ready-to-use templates or workflows, NetIQ relies heavily on system integrators to add these in client deployments.

Omada

Denmark-based Omada offers the Omada Identity Suite (OIS). OIS should particularly appeal to organizations with complex IT environments or those that are heavily invested in Microsoft and/or SAP systems — and that require a flexible solution with strong reporting capabilities.

One-quarter of Omada's customers are within banking, securities and insurance, and one-fifth is in healthcare. The rest of its customers are evenly split across the remaining verticals. The majority of its customers manage between 1,600 to 100,000 identities (the average is 35,000) with automated provisioning of between one and 250 targets.

STRENGTHS

- Omada has a highly flexible data model, ranks in the highest quartile for overall product scores, and scored very high in auditing, reporting and dashboards.
- Omada's geographic strategy is paying off, with increased customer numbers in North America and strong growth in Central Europe.
- Pricing for its product is very competitive, especially for user counts of less than 20,000.

CAUTIONS

- Although Omada is profitable and grows, revenue growth from software has slowed down over the past two years, reflecting low investment in sales and marketing.
- Omada has invested in provisioning capabilities as an alternative option to utilizing Microsoft Forefront Identity Manager (FIM) synchronization for fulfillment and connectors, but its replacement capabilities are below average.
- Its desire to use its own professional services impedes needed partner expansion and results in some competitive partner situations.

Oracle

California-based Oracle offers its Oracle Identity Governance (OIG) Suite, which is especially suited for large organizations with complex processes and that require flexibility in the product.

IGA customers are spread evenly across industry verticals. Its reference customers manage between about 1,100 and 500,000 identities (the average is 95,000), with automated provisioning between one and 450 targets.

STRENGTHS

- It is the most frequently shortlisted vendor among other vendors' reference customers and the vendor most often cited as the competitor to beat by the others included in this Magic Quadrant.
- Adding Oracle's IGA solution to a portfolio of other Oracle IAM products can leverage synergies between those products, making it appealing to existing Oracle customers that view the company as a strategic partner.
- Its global presence and global channel partners enable it to be deployed worldwide.
- Reference customers highlighted reliability, scalability, performance and flexibility as strong points.

CAUTIONS

- Two-thirds of reference customers cite product complexity as a challenge and weak point. Expect significant professional services investment.
- OIG is by default licensed on a per-processor or, upon request, on a per-user basis. While CPU-based licensing can be attractive for large user populations, additional processor licenses may be necessary when overall activity increases, which can complicate long-term budgeting.
- Several reference customers have experienced challenges keeping up with Oracle's product consolidation and

refurbishment over the past two years, which is in line with our interactions with Gartner clients. This is expected to stabilize with OIG version 11gR2 PS3.

SailPoint

Texas-based SailPoint, one of the pioneers of identity and access governance technology, offers IdentityIQ with several optional modules. Its product should appeal to organizations with stringent governance requirements that also need a moderate level of provisioning (up to 250 targets).

Almost half of its customers are in banking, securities and insurance. The rest are distributed evenly among other verticals. The majority of its customers manage between 5,000 and 80,000 identities (the average is 40,000), with automated provisioning of between two and 94 targets. However, there are a few customers with significantly higher identity counts.

STRENGTHS

- A well-functioning and large partner network gives SailPoint momentum to sell and deploy its products worldwide, and provides an abundance of professional services skill sets.
- Reference customers indicate satisfaction rates for the product, and support and maintenance are in the highest quartile in this report.
- Its product scores among the highest across traditional governance capabilities because of its excellent access certification and role management features.

CAUTIONS

- Its product is one of the most expensive ones for user counts of less than 10,000.
- One-third of its reference customers report performance and scalability problems; however, those reference customers using the latest release report early signs of improvement.

- SailPoint has redesigned and upgraded its provisioning and fulfillment capabilities, yet the quality of some connectors is still lagging behind.

SAP

Germany-based SAP offers an IGA solution consisting of five modules, including SAP Identity Management and SAP Access Control. Its solution administrates users and provisions accounts within SAP applications and outside target systems, and provides governance capabilities for heterogeneous environments and SOD controls management for SAP applications. Its products are an excellent fit for existing SAP customers who can take advantage of its extensive and unequalled SAP application integration.

Its customers are found across a broad range of SAP's business and technology software, leveraging common master data and processes for identity and access. Its customers are distributed evenly across verticals, with utilities, manufacturing and natural resources each making up one-fifth. Customer references were in the range of 1,200 to 60,000 identities managed (with an average of 20,000), and used up to 70 targets for automated provisioning (with an average of 20).

STRENGTHS

- SAP Access Control is a strong role performer, includes deep transaction support and is able to work with multiple application-specific role structures.
- SAP has an extensive global presence and a large network of VARs and system integrators that can deliver global services.
- SAP has a strong focus on product quality as parts of its operational processes.

CAUTIONS

- SAP's marketing communications target only existing SAP customers and lack differentiation from typical messages in the industry.

- Organizations without a significant commitment to SAP applications and technology should look for other IGA alternatives.
- Reference customers have indicated that the overall administration of the solution, and tracking and monitoring errors in provisioning workflows is difficult.

The Dot Net Factory

Ohio-based The Dot Net Factory offers EmpowerID — a rich suite of IAM tools that include IGA capabilities. Its product should appeal to organizations that are mainly running on a Microsoft environment and are looking for flexibility and strong automation capabilities.

Gartner estimates that about two-thirds of its customers are divided among healthcare, banking, securities and insurance, and government. The Dot Net Factory did not respond to requests for supplemental information, but it did review the draft contents of this document. Gartner's analysis is based on other credible sources, including information that The Dot Net Factory provided for last year's research, public information, and conversations with three users of its product. The majority of its customers manage between 1,000 and 25,000 identities. Some customers have significantly higher identity counts.

STRENGTHS

- All users interviewed were positive about the flexibility of the product and the "can-do attitude" of the company.
- The Dot Net Factory is effective at leveraging social media and online community forums to provide responsive and detailed product training and support.
- Its product has extensive workflow capabilities and comes with hundreds of predefined workflows.

CAUTIONS

- A very small channel network and limited technical resources hamper the company's ability to extend its reach and scale the business.
- Customers report that documentation for internal data structures and proprietary functions is lacking, so customers have to engage The Dot Net Factory for most customizations.
- The company's marketing strategy and marketing execution lags the norm of other vendors rated in this research. By targeting IT buyers only, it risks being overlooked by business decision makers.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Identity Automation
- The Dot Net Factory

Dropped

The following vendors have credible IGA offerings but did not meet the elevated inclusion criteria for this Magic Quadrant:

- **Caradigm,** based in the state of Washington, has a singular focus on the healthcare market and has for that reason been excluded from this Magic Quadrant.

- Brazil-based **e-trust's** Horacius product has been developed with a focus on security and governance. It emphasizes configuration over customization, and has special capabilities to help its customers comply with Brazilian federal regulations concerning data privacy and integration with the eSocial government portal, making it popular in that geography.
- Singapore-based **Deep Identity** offers an IGA solution in form of its Deep Identity Audit & Compliance Manager (Deep IACM), Deep Identity Manager (Deep IM) and Deep Data Governance Manager (Deep DGM) products. The products are popular in Asia, and the company is starting to expand its geographical reach through partnerships.
- **iSM Secu-Sys** is based in Germany and offers IGA functionality through its bi-Cube IAM suite. The product has a long history and appeals to buyers in the German-speaking DACH region (Germany, Austria, Switzerland), as it aligns with typical business processes and usage patterns common to that geography.

Other Notable Vendors

The following vendors have credible IGA offerings, but did not meet the elevated Inclusion Criteria for this Magic Quadrant:

- **Brainwave** , based in France, offers its Identity GRC solution, with a focus on the management and monitoring of controls over user access, with a strong emphasis on analytics and reporting. Its primary customer vertical is banking and finance in France and the Benelux region of Europe.
- **ForgeRock,** based in California, offers an open-source product called OpenIDM with a focus on REST-based APIs and on scalability, which makes it popular with organizations needing large-customer or citizen-facing provisioning solutions. It is gaining traction among enterprise customers worldwide.
- Germany-based **FSP's** product Organization and Resource Guards (ORG) provides IGA functionality on z/OS, Unix and Windows. It enjoys popularity in the German insurance sector.

- **Microsoft's** Forefront Identity Manager (FIM) product provides access management and data synchronization features to Microsoft and non-Microsoft applications and infrastructure. Up until May 2014, Microsoft did not confirm plans to evolve this product with major releases beyond 2015. Since then, Microsoft has announced a long-term road map and has rebranded the product as Microsoft Identity Manager (a public preview was released 13 November 2014). The public preview displayed many new capabilities; however, very few of them fall into Gartner's definition of IGA. Microsoft has announced investment in IGA-specific capabilities for subsequent versions (after 2015). Gartner will closely monitor Microsoft Identity Manager for potential inclusion in future IGA Magic Quadrants.
- New York-based **OpenIAM,** provides an open-source product, Identity Manager, that includes IGA functionality, including user provisioning, password management, auditing and delegated administration. It is deployed worldwide by customers across multiple verticals.
- Spanish vendor **Soffid** provides an open-source product called Identity & Access Management. The product has comprehensive IGA capabilities and enjoys popularity in Spain, and the company is extending its geographical reach through partnerships in other regions, notably Europe, Asia/Pacific and Latin America.

Inclusion and Exclusion Criteria

Inclusion Criteria

While there are IAM products that deliver some of the functionality listed below, this IGA Magic Quadrant covers vendors that contain all of these features in a product specifically tailored and sold to manage access request life cycles. These core features consist of:

- User interface configuration for multiple user profiles
- Capabilities to support the identity and entitlement life cycles

- Tools for application entitlement discovery, mining and management
- Tools for role discovery and engineering (that is, the identity data model)
- Capabilities to create and edit master data related to identity and access
- Capabilities to consume data from multiple authoritative sources of truth
- Tools to certify data related to identity and access data by specified actors (managers, resource/application owners, and so on)
- Comprehensive workflow capabilities
- Tools to reconcile data from target systems with IGA data
- Tools to manage and synchronize passwords among different target systems
- Tools to support auditing, and segregation of duty administration and compliance
- Tools for user or application role and entitlement administration, and management
- Tools for defining and enforcing identity and access policies, as well as remediation of violations
- Configurable logging for identity and access activities and actions for administrative and end users
- Analytics and reporting of identity and access activities and actions for administrative and end users
- Underlying architecture for the above, including connector architecture for data collection and fulfillment actions

Products must be deployed in customer production environments, and customer references must be available.

Exclusion Criteria

IGA vendors that are not included in this Magic Quadrant have been excluded for one or more of these reasons:

These vendors:

- Do not meet at least half of the Inclusion Criteria
- Supply IGA capabilities for only one specific/targeted technical environment — for example, Windows, IBM i, Unix/Linux, and so on
- Supply IGA capabilities only as a service
- Had 2013 license revenue for on-premises IGA products that was less than $1 million
- Are not the original manufacturer of the IGA products — including value-added resellers that repackage IGA products that would qualify from their original manufacturers
- Include other software vendors that sell IAM-related products but don't have an IGA product of their own
- Are external service providers (ESPs) that provide managed services — for example, data center operations outsourcing

Evaluation Criteria

Gartner analysts evaluate providers on the quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, providers are judged on their ability and success in capitalizing on their vision.

Each Magic Quadrant has two evaluation categories: Ability to Execute and Completeness of Vision.

Each is described below, with subcriteria and weightings provided.

Ability to Execute

Product or Service

Core on-premises products offered by the vendor serve the defined market. This includes current product capabilities, quality, feature sets, skills, and so on, as defined in the market definition and detailed in the subcriteria (capabilities). The specific subcriteria are:

- Identity life cycle
- Entitlements management
- Access requests
- Workflow
- Policy management
- Access certification
- Fulfillment
- Password management
- Role management
- Auditing
- Analytics
- Reporting and dashboards
- Ease of deployment

- Scalability and performance

Overall Viability

Viability includes an assessment of:

- The vendor's overall financial health
- The practical and financial success of the business unit
- The continued investment by a business unit in its IGA product
- The advancement of state-of-the-art functionality within the organization's portfolio of IGA products
- A history of investment in identity and access management product development
- The contribution of IGA to revenue growth

Sales Execution/Pricing

The IGA provider's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel. Factors include pricing, market share and additional purchases (for example, relational database management system [RDBMS], application server, Web server, and so on).

Market Responsiveness/Record

- The vendor's demonstrated ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, and market dynamics change
- How the vendor can meet customers' evolving IGA needs over a variety of use cases
- How the vendor has embraced standards initiatives in the IGA and adjacent market segments and responded

to relevant regulation and legislation

Marketing Execution

The clarity, quality, creativity and efficacy of programs designed to deliver the vendor's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and vendor in the minds of buyers.

This mind share can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience

Relationships, products and services/programs that enable customers to be successful with the IGA products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements, and so on. Factors include customer support programs, service-level agreements, and Gartner client and reference customer feedback.

Operations

The ability of the organization to meet its goals and commitments regarding its IGA product. Factors include the quality of the organizational structure, including skills, experience, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis. Factors include staffing and recruitment and number of major reorganizations in past 12 months.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting

Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (January 2015)

Completeness of Vision

Market Understanding

The ability of the vendor to understand buyers' needs and translate these needs into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those wants with their added vision. Factors include:

- Understanding customer needs

- Identifying market trends and changes

Marketing Strategy

The clarity, differentiation and performance management of the vendor's marketing messages and campaigns.

The appropriateness of the vendor's use of social media, other online media and traditional media as part of its marketing efforts.

Sales Strategy

The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy

The vendor's approach to developing and delivering its IGA offerings that meet customers' and prospects' needs with respect to their key selection criteria, the needs created by the Nexus of Forces and other market dynamics.

Factors include:

- How the vendor will increase the competitive differentiation of its products
- The vendor's ability to exploit the Nexus of Forces to improve its products
- The vendor's participation in IGA and adjacent standards development

Business Model

The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy

The vendor's strategy to direct resources, skills, and offerings to meet the specific needs of individual market segments, including SMBs, service providers and verticals.

Innovation

The vendor's culture of innovation, continuing track record in market-leading innovation, and the provision of distinctive products, functions, capabilities, pricing models, and so on. We focus on technical and nontechnical innovations introduced since July 2013, as well as the vendor's road map over the next few years.

Geographic Strategy

The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	**Weighting**
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High

Business Model	Medium
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Low

Source: Gartner (January 2015)

Quadrant Descriptions

Leaders

IGA Leaders deliver a comprehensive toolset for governance and administration of identity and access. These vendors have successfully built a significant installed customer base and revenue stream, and have high viability ratings and robust revenue growth. Leaders also show evidence of superior vision and execution for anticipated requirements related to technology, methodology or means of delivery. Leaders typically demonstrate customer satisfaction with IGA capabilities and/or related service and support.

Challengers

IGA Challengers deliver a relatively strong set of governance and administration features for identity and access. Some have major clients using their IGA solution. Challengers also show strong execution, and most have significant sales and brand presence. However, Challengers have not yet demonstrated the feature completeness, scale of deployment or vision for IGA that Leaders have. Rather, their vision and execution for technology, methodology and/or means of delivery tend to be more focused or restricted to specific platforms, geographies or service. Clients of Challengers are relatively satisfied but ask for additional IGA features as they mature.

Visionaries

Vendors in the Visionaries quadrant provide products that meet many IGA client requirements, but may not have the means (such as budget, personnel, geographic presence, visibility and so on) to execute as Leaders do. Due to smaller size, there may be initial concerns among some potential buyers of long-term viability. Visionaries are noted for their innovative approach to IGA technology, methodology and/or means of delivery. They often may have unique features, and may be focused on a specific industry or specific set of use cases, more so than others. Visionaries are often the technology leaders in evolving markets such as IGA, and enterprises that seek the latest solutions often look to Visionaries.

Niche Players

Niche Players provide IGA technology that is a good match for specific IGA uses, cases or methodology. They may focus on specific industries and can actually outperform many competitors. They may focus their IGA features primarily on a specific vendor's applications, data and/or infrastructure. Vendors in this quadrant often have a small installed base, a limited investment in IGA, a geographically limited footprint, or other factors that inhibit providing a broader set of capabilities to enterprises now and during the 12-month planning horizon. Inclusion in this quadrant, however, does not reflect negatively on the vendor's value in the more narrowly focused service spectrum. Niche solutions can be very effective in their area of focus.

Context

In 2013, Gartner covered the IGA market for the first time with a brand-new, inclusive Magic Quadrant, with a comprehensive list of vendors that established the IGA market as the combination of user administration and provisioning (UAP) and identity and access governance (IAG). In 2014, Gartner recalibrated to focus on clients who will be make purchasing decisions for IGA products within the next year. These are significant investments, and clients will need to be assured that their purchasing decisions align with the trends that impact how organizations will run IGA technology over many years. Anticipating future needs is a crucial and important component of how Gartner weighs its evaluation criteria, ratings and scoring of IGA vendors.

Gartner believes digital business is an important overall IT trend that will lead to adoption of bimodal IT, and with it will come bimodal IAM. Bimodal IAM means running systems in two modes: one that is "built to last" and one that is "built to adapt" to a constant disruptive environment. The adaptive mode will require technology that is more agile, flexible and facilitates innovation.

For these reasons stated above, we have adjusted our evaluation criteria weighting to reflect the following:

- The adaptive/agile mode of IT will require organizations to look for a transformational product strategy that reflects constant innovation and development from vendors. For this reason, Gartner lowered the weightings for marketing strategy, sales strategy, vertical/industry strategy and geographic strategy in the Completeness of Vision category in order to give a relatively stronger focus to market understanding, offering (product) strategy and innovation.
- For Ability to Execute, Gartner lowered the weighting for marketing execution and sales execution/pricing because innovations, excellent products and good customer experiences should carry more weight than revenue numbers and mind share. Gartner lowered market responsiveness/record because true innovators will lead future trends before the market has time to adopt.

Your needs and circumstances should determine how you use the Magic Quadrant, not the other way around. To evaluate vendors in the Leaders quadrant only and ignore those in other quadrants is risky and thus discouraged. For example, a vendor in the Niche Players quadrant could offer functions that are ideally suited to your needs. Similarly, a Leader may not offer functions that meet your requirements — for example, its offerings may cost more than competitors or it may not support your region or industry. Use a Magic Quadrant to narrow your list of choices, but do not base your decision only on the model. Talk to the Gartner analysts who created the research for more details and insight.

Vendor positioning in Magic Quadrants illustrates useful information about vendors. For example, if you want to make a strategic investment in a technology, a vendor's viability will be critical. Therefore, weight a vendor's Ability to Execute more heavily than its Completeness of Vision, and evaluate Challengers before Visionaries. Conversely, if you can gain a competitive advantage by investing in an emerging technology, evaluate Visionaries before Challengers.

Organizations that take on IAM initiatives will require a combination of several technologies. IGA is the central technology that manages the information about identities, accounts and entitlements. It interacts, and in some cases even overlaps with:

- **Authentication:** Corroboration of claimed identities and credential management. IGA products often include password management as part of the offering (see "Market Guide for Password Management Tools").
- **Authorization:** These include Web access management (WAM), API gateways, management tools, and externalized authorization management. These functions leverage identity information managed by IGA products, and work together with authentication technology to control access to resources (see "Market Guide for Web Access Management Software").
- **Directory Services:** These hold information about users and groups and are provisioned by IGA.
- **Privileged Account Management (PAM):** These tools are used to enforce policies concerning privileged access, and they complement IGA tools. Where IGA tools manage accounts and identities, PAM tools control access to privileged accounts and will enforce processes and monitor the use of administrative privileges (see "Market Guide for Privileged Account Management").

Alternatives to IGA Software

- **Active Directory focus:** Organizations whose use cases are centered around the Microsoft environment may be able to use Microsoft-centric resource administration tools in lieu of IGA tools to manage identities, accounts and permissions within this restricted scenario (see "Technology Overview for Active Directory IAM Tools").
- **Cloud and SaaS:** Organizations may opt to run IGA services in the cloud by subscribing to an IDaaS vendor. This is a viable alternative for small organizations, those that have simple IGA requirements or those that run a considerable amount of infrastructure in the cloud. Maturity and capabilities for pure cloud IGA is still behind on-premises IGA — with the exception of service providers that run a dedicated instance of an on-premises IGA product as a managed service in the cloud (see "Magic Quadrant for Identity and Access Management as a Service").

Selection Criteria

Organizations should consider IGA products from vendors in every quadrant of this Magic Quadrant based on their specific functional and operational requirements. Product selection decisions should be driven by several factors:

- What is the total cost related to deploying the tool, including any consulting or professional services?
- What is the estimated length of time needed to deploy the tools?
- Does the vendor have an efficient, working partner network that can quickly deliver specialized services around the deployment and operation of the IGA products?
- Is support available locally, in the language of my organization and during regular business hours within my geographies?

- How easy is it to integrate this technology into my existing infrastructure? Will my IT organization be able to support it?
- Will my business users find it easy to work with this technology? How will it enable them, and the business?
- Does this vendor help my organization deliver compliance with security policies and regulations more effectively?

Market Overview

In 2013, Gartner observed an increase in the consolidation of governance and administration functions as forces in social, mobile, cloud and information continued to take root. This year, major vendors are expanding capabilities in areas where they were not last year: Provisioning-centric players are investing in IGA; governance-focused specialists are building out provisioning and fulfillment.

Gartner observes the following trends:

- Most vendors have added **mobile** apps or special mobile Web interfaces to cater to targeted business requirements such as approval processes, password reset, access requests and certifications. Demand for integration with enterprise mobility management (EMM) products has grown.
- While some products offer **analytics** for traditional use cases such as role mining, other vendors move beyond these use cases to add support for advanced risk analysis, fine-grained SOD analysis for ERP products, and decision support for approvals and certifications. In the long run, analytics is expected to enable automation of policies to eventually make manual approvals or certifications obsolete.
- An accelerated **consolidation of governance and provisioning** functions into a single product, rather than two distinct products with different interfaces, is taking place. Provisioning-centric vendors are investing in governance; governance-centric vendors are building out their provisioning and fulfillment capabilities.

- **SCIM** support for SaaS provisioning is growing, and some vendors are even using SCIM internally in the backbone of their connector framework.
- Emphasis on **total cost of ownership** as a selection criterion has continued. This drives adoption of "good enough" solutions from smaller vendors inside and outside the Magic Quadrant. This is also putting pressure on sales to offer competitive pricing and discounts, rather than value-based pricing.
- There is continued interest in the **user experience** as a selection criterion across a range of business use cases. The age of IGA users being strictly IT users is rapidly declining.
- An increased focus on **threat protection** , including insider threats, is driving integration of IGA products with overall threat detection and analysis tools, specifically with SIEM products.
- Integration between IGA products and **PAM** products is still in its early stages, driven by interest from clients and competition from vendors that straddle the PAM and IGA markets.
- A few vendors are adding **business agility** capabilities to embrace team-based project use cases (such as access and approval chains tied to project membership) or people having multiple personas (such as an employee who performs a different set of tasks under a different supervisor as a result of a strike or weather-related emergency assignment).
- There is a rush to **alleviate complex deployment** and upgrade processes, with virtual appliance-based models becoming more popular. Several vendors have also made significant efforts to make their product easier to deploy, administrate, customize and trace/debug (especially in terms of workflows and connectors).
- Similarly, a few vendors are providing **libraries of workflow templates** to better fit common business processes, thereby reducing startup cost/time and simplifying customization.
- Some of those vendors are even taking the last step further, providing a set of **reference builds** that bring together workflow templates and user experience elements to produce a specific configuration of their

product that is more closely aligned with the needs of the customer.

- Organizations that have had IGA platforms for five-plus years are beginning to **re-evaluate their vendor platforms** , looking for a better user experience, reduced overhead (fewer people need to support/configure the product), ease of deployment and increased scalability.

In 2014, the market size for IGA is estimated to be $1.52 billion with an annual growth rate of 13.94% from 2013 to 2014 ($1.31 billion to $1.52 billion). This year, Gartner has revised the formula for IGA market size based on a detailed re-evaluation of the market based on the number of vendor revenue guidance and forecast growth expectations. Variance in IGA pricing is decreasing as several major vendors are competing more on price with heavier discounts. Total cost of ownership has been under client scrutiny, so several vendors are simplifying deployments, offering more pricing options or reducing pricing.

In 2015, Gartner expects the consumerization of IGA — which began in 2014 for many vendors — to continue to grow: Business demand for user-friendly interfaces is so strong that many vendors have cited UI upgrades on product road maps. Four other areas that are emerging include business agility, data access governance, privileged access and security.

- **Business agility:** This is an emerging driver for IGA products specifically. Some vendors are adding capabilities to extend data models for team-based project use cases and partnerships between organizations that drive collaborative efficiencies.
- **Data access governance:** Several vendors have reported a significant uptick in customer interest for integration of IGA with data access governance (DAG) products. One vendor has an offering and many are partnering with DAG vendors.
- **Privileged access:** Integration between IGA products and PAM products is still in the early stages, but is driven by interest from clients and competition from vendors that straddle the PAM *and* IGA markets.

- **Security:** An increased focus on threat protection, including insider threats, is driving integration of IGA products with overall threat detection and analysis tools, specifically with SIEM products.

?

Small & Midsize (<1000 Employees) Context

Market Differentiators

Midsize organizations have not uniformly adopted identity governance and administration (IGA) technology for several reasons:

- Many are not publicly traded or regulated and, therefore, do not face the same level of compliance pressure.
- IGA technology has historically been expensive to buy, difficult to deploy and required expert skills to be used effectively.
- Stakeholders in midsize organizations have fewer resources available and are difficult to convince to make large investments on improving internal security posture and improving user and access management.

However, many midsize organizations face many of the same issues as larger organizations:

- Repetitive time-consuming administration tasks around granting entitlements leave the IT department with little or no accountability or proper justification. This is a bigger problem for midsize organizations because they typically have fewer IT staff.
- Long turnaround times for access requests lead to a loss of employee efficiency.
- A lack of a full identity and entitlement life cycle leads to access being granted when it should not, and it not being removed when it is no longer needed — thereby increasing risk.

For these reasons, midsize organizations should not hesitate to adopt IGA technology — especially since its overall total cost of ownership (TCO) has come down. The most commonly cited business driver for midsize organizations is reduced operational cost via IT efficiency (process automation that eliminated tedious manual tasks). Governance is rarely on the radar of privately held midsize organizations, except for those that are regulated. However, risk management is a tangible and achievable goal — even by companies that do not have a large dedicated security and risk staff — and should, therefore, not be forgotten. Indeed, an initial focus on governance means an understanding of who has access to what and since when, who authorized it, and when was this last reviewed? Getting the answers to these questions will motivate many organizations to "clean up the house," identify risks and gaps, and in the process, streamline the deployment of automation functions.

Considerations for Technology and Service Selection

Midsize organizations rarely have the option to staff dedicated identity and access management (IAM) teams, and can only dedicate limited or external resources to the operation of IGA infrastructure. IGA products will therefore need to be easy to deploy and integrate for most midmarket IT departments. They also need to be maintainable with few resources. For midsize organizations, this often requires adopting solutions with out-of-the-box features, and avoiding or minimizing customization as much as possible. This typically requires the adoption of standard IAM identity and entitlement life cycle processes that are provided by most products. Midsize organizations may find it easier to adopt processes, but even in that case, remember that IAM is first and foremost a business change initiative rather than a technical project. This change will require executive sponsorship to bring stakeholders from other lines of the business on board.

Managing relationships with large and complex vendors is always challenging for midsize organizations, especially because they do not have the clout or importance in terms of account to gain special attention from the larger vendor. Unless an established relationship with a large complex vendor already exists and is working well, midsize organizations should look for smaller, more agile vendors, or vendors who have a large and effective channel partner network, to find a vendor or reseller that works well for them.

Cost of the solution is another important consideration. The overall cost of ownership is affected by many factors, one of them being the license price. Some vendors have high list prices but discount heavily for larger user counts. These discounts are unobtainable by midsize organizations, making those vendors less attractive compared to vendors who start with reasonable pricing for smaller deal sizes.

Similar to the license price, composition of the offer is another important factor. Bundled solutions that include everything (especially all required connectors) for one set price can be attractive because they eliminate surprise additional costs. On the other hand, some vendors offer rightsized entry-level bundles that may well fit the IAM requirements and scale of midsize organizations. When the IAM leader clearly understands the scope of the IGA requirements for the next three years, bundles have proven to be a good fit for most midsize organizations. If the requirements are likely to change, the former option may prove to be more attractive.

"Critical Capabilities for Identity Governance and Administration" has a use case for Small or Midsize Business. The use case uses weightings optimized for small and midsize businesses to rank several vendors against each other based on technical capabilities.

Many midsize organizations have system architectures that are centered on Active Directory and Microsoft technologies. These organizations should also map their requirements against offerings by vendors offering delegated management tools for Active Directory (see "Technology Overview for Active Directory IAM Tools"). Those delegated management tools are less functional than fully fledged IGA tools, but they may be just enough if Active Directory is the only, or predominant, target for identity and access. They are described in a list toward the end of this document.

Notable Vendors

Vendors included in this Magic Quadrant Perspective have customers that are successfully using their products and services. Selections are based on analyst opinion and references that validate IT provider claims; however, this is not an exhaustive list or analysis of vendors in this market. Use this perspective as a resource for evaluations, but explore the market further to gauge the ability of each vendor to address your unique business problems and technical concerns. Consider this research as part of your due diligence and in conjunction with discussions with Gartner analysts and other resources.

Avatier is focused on low TCO for its solutions and stands out in usability, spending considerable effort on making its products easy to use, which is confirmed by customer references. Self-service on PC and all major mobile platforms is well-integrated and serves to increase efficiency and reduce administration time for the IT department. The solution is available in multiple modules, allowing organizations to start small and expand over time. An optional Advanced Connector Package includes more than 100 additional connectors in addition to the Active Directory connector that is included in the base package.

Beta Systems has traditionally been focused more on large accounts, but is making a concerted effort to make its product appeal to the midmarket. It offers two starter packages, called Fast Forward IAM, for midsize businesses. They are priced at €120,000 for up to 2,000 users, or €180,000 for up to 4,000 users. The packages include SAM Enterprise, including three standard connectors, SAM Business Process Workflow and professional services in a fixed-price package that addresses the core needs of midsize organizations and is focused on a quick return on investment by those clients. This is a new offering, however, and Gartner does have feedback from midmarket reference customers, but not from customers who purchased this particular standard package. Beta Systems is strong in Europe and has grown its presence and market share in North America over the past few years.

Dell has many midmarket customers that have commented on the ease of administration. Its IGA product comes with many predefined workflows and is highly configurable. Its user interface is intuitive — both for administrators as well as for end users. Dell achieves the highest score of all vendors for the Small or Midsize Business use case in "Critical Capabilities for Identity Governance and Administration." Its base version includes out-of-the-box connectors for major directories, databases and Microsoft technologies. Pricing is among the lowest from all vendors for typical midsize enterprise requirements. Connectors for ERP systems such as SAP and Oracle E-Business Suite (EBS) are available as an additional option.

One-third of **Evidian's** customers are midsize organizations, reflecting a focus on this market with an integrated solution that is matched to typical requirements for this constituency. The company offers a quick-start methodology to deploy a simple IAM solution for midsize organizations that allows them to certify and manage access for a business application. Midmarket customers have commented positively on the completeness and modularity of the solution. Pricing for midsize configurations is attractive. Evidian will mostly appeal to European organizations due to a limited presence elsewhere.

Fischer International has a strong standing in the North American midsize enterprise market. Its solutions are easy to deploy, maintain and configure, and they come with an intuitive user interface for users and administrators. Pricing is among the lowest from all vendors for typical midsize enterprise requirements, including all existing connectors. Connectors for target systems that are not yet available can be developed by the vendor for a fee. Reference customers have consistently lauded the company for delivering excellent support.

Hitachi ID Systems' IGA solution is available in several different reference builds (preconfigured and packaged editions) that minimize time to deploy and, therefore, lower TCO. Hitachi ID is tied for second place for the Small or Midsize Business use case in "Critical Capabilities for Identity Governance and Administration." The product has modest hardware requirements, and pricing is among the lowest from all vendors for typical midsize enterprise requirements, and includes all features and connectors. It also has many unique password management features such as managing preboot passwords that can save valuable time for the IT department. Hitachi ID has a worldwide network of partners that can deliver local support for midsize organizations.

iSM Secu-Sys' bi-Cube is an attractive option for midsize organizations in the German-speaking region, because the company is primarily focused on that market. The product is built on an understanding of a business-centric role model that fits common business process within that region. A powerful policy model can automatically assign access rights based on user attributes or other contextual information, reflecting a focus on mature processes and data quality. Its solution is highly modularized and has a low entry point in terms of pricing.

Microsoft customers with enterprise agreements can use existing Windows Server Client Access Licenses (CALs) for their users in order to deploy Forefront Identity Manager (FIM). The product is popular with many midsize organizations and has a large pool of experienced professionals and consultants that can deliver integration services. Potential customers should be aware, however, that Microsoft has not innovated the product for two years, and Microsoft has announced an investment in IGA-specific capabilities only for subsequent versions (after 2015). FIM will be rebranded to Microsoft Identity Manager (MIM), and Microsoft Azure Active Directory Premium clients will receive a CAL for MIM as part of the package.

NetIQ has a sizable number of midmarket clients, and its midmarket reference customers provided positive feedback about NetIQ's IGA solution. NetIQ scored in the highest third for the Small or Midsize Business use case in "Critical Capabilities for Identity Governance and Administration." There is a large pool of experienced independent consultants as well as a large network of channel partners who can deploy, configure and support NetIQ's solution worldwide. NetIQ Identity Manager is priced attractively within the lowest quartile of all products in this Magic Quadrant.

OpenIAM offers its open-source Identity Manager as downloadable software, or alternatively as a physical appliance. For midsize organizations, a typical IGA usage scenario includes provisioning, access request and governance starting at $25 per user. The company also offers a "jump-start service" for midsize organizations to be up and running within 30 days.

Delegated Administration Tools for Active Directory

Midsize organizations can also potentially take advantage of Microsoft-centric delegated admin tools from other providers (see "Technology Overview for Active Directory IAM Tools"). While these tools are not a full-blown replacement for IGA products, they simplify the management of users, groups, systems and policies by offering capabilities beyond those of the native Active Directory Users and Computers (ADUC) utility provided by Microsoft. Some of the more sophisticated delegated administration tools feature workflow capabilities, self-service interfaces for users, entitlement-centric administration (allowing groups to be managed by specific individuals) as well as basic governance capabilities by offering certifications of existing access. Some vendors for Microsoft-centric delegated administration tools are:

- CionSystems (www.cionsystems.com): Active Directory Manager Pro
- Dell Software (software.dell.com): ActiveRoles Server and Active Administrator
- Imanami (www.imanami.com): GroupID
- ManageEngine (www.manageengine.com): ADManager Plus
- Namescape: (www.namescape.com): rDirectory
- NetIQ (www.netiq.com): NetIQ Directory and Resource Administrator
- Softerra (www.softerra.com): Adaxes
- STEALTHbits (www.stealthbits.com): Access Information Center
- Thycotic (www.thycotic.com): Group Management Server
- Varonis (www.varonis.com): DataPrivilege
- Visual Click Software (www.visualclick.com): DSRAZOR for Windows
- Zohno (www.zohno.com): Zohno Tools

These tools are typically licensed on a per-entry or per-user basis. Pricing and capabilities of products vary significantly, from $3 per user on the low end to $40 per user on the high end, where they are at par in terms of pricing with many IGA tools.

?

Healthcare Providers Context

Market Differentiators

The healthcare vertical has been a late adopter of identity governance and administration (IGA) technologies, especially on the provider side, with good reason: The vast majority of healthcare providers have been relatively independent hospitals and clinic networks with eclectic IT environments and fluid workforces, which has made integrating IGA products challenging. In addition, IGA products are expensive, and healthcare providers usually have had limited IT budgets.

Worldwide, healthcare is highly regulated, and occasionally, the provision of and payment for healthcare services are under government control. The increasing regulation over sharing and disclosure of personal health information for patients is a unique requirement for the healthcare industry, which adds to the regulatory burdens that healthcare may share with other industries in various countries. Fear of PHI disclosures and theft, as well as the possibility of hefty fines, has driven much of the recent uptick in interest in IGA products.

Modern trends in medical practice management have driven a transition to electronic health records (EHRs), which are often managed by complex applications from vendors like Allscripts, Cerner, Epic, McKesson and Meditech. Healthcare providers also make use of computerized physician order entry (CPOE) systems, radiology, pharmacy and laboratory systems. Many other clinical applications used by healthcare providers are legacy systems or self-contained products that were not designed with the concept of automated account administration in mind, so integration for provisioning is challenging at best and impractical in many cases. Support for these types of applications in the form of connectors or integration frameworks is a significant requirement for healthcare providers.

Applications intended for use in clinical situations are often delivered through server-based computing using remote or virtual desktop technologies. Multiple personnel need to use the same machines continually, and there is a desire for context (open patient records or images) to follow users like doctors or nurses as they move from room to room. This has driven broad adoption of enterprise single sign-on (ESSO) products from vendors like Caradigm, Evidian, HealthCast, IBM, Imprivata and Oracle that can support Clinical Context Object Workgroup (CCOW) standards for user-interface context integration among multiple applications in clinical environments. ESSO integration is usually a requirement for IGA solutions targeting healthcare providers.

The fluid nature of the workforce in many healthcare provider organizations presents complications for the identity life cycle capabilities provided by many IGA products. Doctors, nurses, technicians and other specialists are often contracted individually or through specialty vendors. Many healthcare systems are associated with medical schools, which means that students and faculty need to be considered. In addition, staff may occasionally float among multiple facilities and responsibilities that may require access to different information systems, which can present challenges for role and policy management.

Considerations for Technology and Service Selection

When selecting IGA vendors for deployment in the healthcare industry, look for and analyze these features from products or services to meet your needs:

1. Adequate identity life cycle capabilities that could adapt to the institution's approach to personnel management. Some organizations will have multiple HR systems, and most will have multiple types of relationships with specialty vendors for contract medical personnel.

2. Demonstrable support for the multitude of home country regulatory obligations faced by the organization.

3. Availability of connectors, either native or third-party, for the EHR and financial management systems in

use or planned for deployment throughout the institution.

4. Integration with ESSO solutions that may be in use by the institution. An IGA product or service usually will provision directly to an ESSO solution or provision to the directory used by the ESSO solution.
5. Flexible options (such as integration with service desk ticketing systems or even "screen scraping") for integrating with clinical systems that do not offer easy support for remote account management.
6. Scalability. Some products are optimized for use by large organizations where there are many users and applications with geographically distributed account repositories. Others are targeted at midsize, community healthcare providers, where the number of users and complexity of systems may be more modest.

Notable Vendors

Vendors included in this Magic Quadrant Perspective have customers that are successfully using their products and services. Selections are based on analyst opinion and references that validate IT provider claims; however, this is not an exhaustive list or analysis of vendors in this market. Use this perspective as a resource for evaluations, but explore the market further to gauge the ability of each vendor to address your unique business problems and technical concerns. Consider this research as part of your due diligence and in conjunction with discussions with Gartner analysts and other resources.

The vendors reviewed here were selected for inclusion in this contextualization because they demonstrate two or more of the following characteristics:

- The healthcare industry is their largest targeted vertical market or accounts for a significant percentage of their total revenue. All vendors included earned at least 10% of their past-year revenue from healthcare customers.

- They provide packaged connectors and content for EHR systems and other clinical applications.
- They have IGA-specific marketing that is focused on the healthcare industry.

Avatier

Healthcare represents the second largest industry segment (after manufacturing) for Avatier, with a focus on the U.S. market. Avatier's simplified setup and administration for IGA and a consolidated approach to service desk, account administration, provisioning and password management are attractive to healthcare providers with lean operations and tight project deadlines.

Caradigm

Caradigm, a U.S. company based in Bellevue, Washington, was formed as a joint venture between GE Healthcare and Microsoft in 2012. Caradigm's entrant in the IGA market is Caradigm Provisioning, which is packaged as a complete solution aimed exclusively at healthcare providers to address privacy and security regulations, like Health Insurance Portability and Accountability Act (HIPAA) in the U.S. Caradigm Provisioning is a key component of the vendor's identity and access management portfolio of products, including offerings for SSO and context management. A key distinguishing feature is its ability to provide detailed and product-specific role-based provisioning for EHR software such as Epic.

Courion

Courion derives more of its revenue from healthcare than from any other industry, with a focus on the U.S. market. Their strength in the healthcare market has been driven by its focus on delivering reporting and compliance features specific for HIPAA/Health Information Technology for Economic and Clinical Health (HITECH) regulations. Courion has also developed numerous connectors for a broad range of clinical applications as well as multiple connectors for ESSO integration. It is also capable of integrating with health provider licensing systems to disable accounts (after providing warnings) when a caregiver's license has expired to ensure that physicians and nurses renew their licenses.

EMC (RSA)

Healthcare is the second-largest industry sector (after financial services) for the RSA Identity Management and Governance (IMG) product. Increasing regulations worldwide have allowed RSA to bridge IMG's governance and compliance strengths with its Archer GRC offering to extend rich coverage over regulations like HIPAA. RSA has also utilized the Health Level 7 (HL7) standard to develop more connectors for clinical applications, and recently developed its own connector for Epic using HL7 and Web services.

Evidian

Evidian derives more of its revenue from healthcare than from any other industry, with a focus on the unique needs of European markets. Evidian's Health package, consisting of the company's Identity & Access Management (I&AM), Enterprise SSO and Web SSO products, has allowed it to address confidentiality regulations and requirements for strong authentication that have been significant drivers for healthcare providers in Europe. Evidian's purchase by Atos is expected to expand its sales presence beyond the markets where it has already demonstrated success.

NetIQ

NetIQ has an extensive partner network that it leverages when approaching specific industries. In the healthcare market, NetIQ's partners have assembled offerings composed of multiple NetIQ products that are intended to satisfy the specific needs of healthcare providers. Identity Manager is offered as part of IAM solutions that also include NetIQ's Access Manager (Web access management [WAM]) and SecureLogin (ESSO) products to assist healthcare personnel get access to patient data from different locations with various devices like desktop machines in examination rooms, laptops, tablets and smartphones. Identity Manager ties the solution together by providing for identity life cycle needs, password synchronization, and provisioning and deprovisioning of access in clinical systems.

Oracle

Oracle Identity and Access Management Suite Plus has been positioned as the key security element of Oracle's approach to the healthcare industry. One advantage that Oracle has had in the healthcare industry has been the integration of Oracle Identity Governance (OIG), with Oracle Enterprise Single Sign-On Plus. Combined with Oracle Access Manager for WAM and Oracle's directory products, Oracle solutions can cover the full range of IAM needs for healthcare providers. Both Oracle Identity Manager (OIM) and Oracle Identity Analytics (OIA) have been used by healthcare providers, either together or individually, to provide automation and access governance for management of clinical applications.

SailPoint

Healthcare has seen an increasing presence in SailPoint's industry coverage because healthcare has seen an escalation in regulatory obligations in recent years. This expansion into healthcare has been facilitated by superior support of SailPoint's IdentityIQ for governance and compliance needs of organizations in heavily regulated industries. SailPoint has solidified its position in the healthcare market through persona support and specialty connectors for clinical applications.

Saviynt

Saviynt, a U.S. company based in California, is one of the rare vendors that approaches IGA and segregation of duties (SOD) controls monitoring with a common suite of products. Whereas most SOD controls monitoring vendors tend to focus exclusively on financial applications, Saviynt has expanded its coverage to include healthcare applications — providing content for identifying SOD violations and sensitive access for leading clinical applications. Saviynt has strong support for Epic, with the ability to perform role engineering (along with role transport), emergency access (with activity review), compliant provisioning and access certification. It also sells a stand-alone Epic connector that can be used with other vendors' IGA products.

Evidence

The following sources were used in the creation of this research:

- Gartner client interactions
- Phone interviews and online surveys for vendor-provided references and vendor channel partners
- A comprehensive vendor survey that aligned with the evaluation criteria
- Secondary research services to support the overall viability evaluation criteria
- Product demos from all participating vendors

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.
