KuppingerCole Leadership Compass

by Martin Kuppinger | October 2012

Identity Provisioning

Leaders in innovation, product features, and market reach for Identity Provisioning. Your compass for finding the right path in the market.

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Content

1. Management Summary

Identity Provisioning is still one of the core segments of the overall IAM market. Thus it comes to no surprise that this segment is more crowded by vendors than virtually all the other IAM market segments. This Leadership Compass provides an overview and analysis of the Identity Provisioning market segments.

It shows that there are several established vendors with mature solutions, but also some very interesting smaller or regional vendors with a good potential for growth and for delivering what customers require.

Picking solutions always requires a thorough analysis of customer requirements and a comparison with product features. Leadership does not always mean that a product is the best fit. However, this Leadership Compass will help identifying those vendors customers should have a closer look at.

2. Methodology

KuppingerCole Leadership Compass is a tool which provides an overview of a particular IT market segment and identifies the leader in that market segment. It is the compass which assists you in identifying the vendors and products in a particular market segment which you should consider for product decisions.

It should be noted that it is inadequate to pick vendors based only on the information provided within this report. Customers must always define their specific requirements and analyze in greater detail what they need. This report doesn't provide any recommendations for picking a vendor for a specific customer scenario. This can be done only based on a more thorough and comprehensive analysis of customer requirements and a more detailed mapping of these requirements to product features, i.e. a complete assessment.

We look at four types of leaders:

- Product Leaders: Product Leaders identify the leading-edge products in the particular market segment. These products deliver to a large extent what we expect from products in that market segment. They are mature.

- Market Leaders: Market Leaders are vendor which have a large, global customer base and a strong partner network to support their customers. A lack in global presence or breadth of partners can prevent a vendor from becoming a Market Leader.

- Innovation Leaders: Innovation Leaders are those vendors which are driving innovation in the particular market segment. They provide several of the most innovative and upcoming features we hope to see in the particular market segment.

- Overall Leaders: Overall Leaders are identified based on a combined rating, looking at the strength of products, the market presence, and the innovation of vendors. Overall Leaders might have slight weaknesses in some areas but become an Overall Leader by being above average in all areas.

For every area, we distinguish between three levels of products:

- Leaders: This identifies the leaders as defined above. Leaders are products which are exceptionally strong in particular areas or overall.

- Challengers: This level identifies products which are not yet leaders but have specific strengths which might make them leaders. Typically these products are also mature and might be leading-edge when looking at specific use cases and customer requirements.

- Followers: This group contains products which lag behind in some areas, such as a limited feature set or only a regional presence. The best of these products might have specific strengths, making them a good or even best choice for specific use cases and customer requirements but are of limited value in other situations.

Our rating is based on a broad range of input and a long experience in that market segment. Input consists of experience from KuppingerCole advisory projects, feedback from customers using the products, product documentation, a questionnaire sent out before creating the KuppingerCole Leadership Compass, and other sources.

3. Product Rating

KuppingerCole as an analyst company regularly does evaluations of products and vendors. The results are, amongst other types of publications and services, published in the KuppingerCole Leadership Compass Reports, KuppingerCole Product Reports, and KuppingerCole Vendor Reports. KuppingerCole uses a standardized rating to provide a quick overview on our perception of the products or vendors. Providing a quick overview of the KuppingerCole rating of products requires an approach combining clarity, accuracy, and completeness of information at a glance. KuppingerCole uses the following categories to rate products:

- Security
- Functionality
- Integration

- Interoperability
- Usability

Security – security is measured by the degree of security within the product. Information Security is a key element and requirement in the KuppingerCole IT Model (#70129 Scenario Understanding IT Service and Security Management). Thus, providing a mature approach to security and having a well-defined internal security concept are key factors when evaluating products. Shortcomings such as having no or only a very coarse-grained, internal authorization concept are understood as weaknesses in security. Known security vulnerabilities and hacks are also understood as weaknesses. The rating then is based on the severity of such issues and the way a vendor deals with them.

Functionality – this is measured in relation to three factors. One is what the vendor promises to deliver. The second is the status of the industry. The third factor is what KuppingerCole would expect the industry to deliver to meet customer requirements. In mature market segments, the status of the industry and KuppingerCole expectations usually are virtually the same. In emerging markets they might differ significantly, with no single vendor meeting the expectations of KuppingerCole, thus leading to relatively low ratings for all products in that market segment. Not providing what customers can expect on average from vendors in a market segment usually leads to a degradation of the rating, unless the product provides other features or uses another approach which appears to provide customer benefits.

Integration—integration is measured by the degree in which the vendor has integrated the individual technologies or products in the portfolio. Thus, when we use the term integration, we are referring to the extent in which products interoperate with themselves. This detail can be uncovered by looking at what an administrator is required to do in the deployment, operation, management and discontinuation of the product. The degree of integration is then directly related to how much overhead this process requires. For example: if each product maintains its own set of names and passwords for every person involved, it is not well integrated. And if products use different databases or different administration tools with inconsistent user interfaces, they are not well integrated. On the other hand, if a single name and password can allow the admin to deal with all aspects of the product suite, then a better level of integration has been achieved.

Interoperability—interoperability also can have many meanings. We use the term "interoperability" to refer to the ability of a product to work with other vendors' products, standards, or technologies. In this context it means the degree to which the vendor has integrated the individual products or technologies with other products or standards that are important outside of the product family. Extensibility is part of this and measured by the degree to which a vendor allows its technologies and products to be extended for the purposes of its constituents. We think Extensibility is so important that it is given equal status so as to insure its importance and understanding by both the vendor and the customer. As we move forward, just providing good documentation is inadequate. We are moving to an era when acceptable extensibility will require programmatic access through a well-documented and secure set of APIs. Refer to the Open API Economy Document (#70352 Advisory Note: The Open API Economy) for more information about the nature and state of extensibility and interoperability.

Usability —accessibility refers to the degree in which the vendor enables the accessibility to its technologies and products to its constituencies. This typically addresses two aspects of usability – the end user view and the administrator view. Sometimes just good documentation can create adequate accessibility. However, overall we have strong expectations regarding well integrated user interfaces and a high degree of consistency across user interfaces of a product or different products of a vendor. We also expect vendors to follow common, established approaches to user interface design.

We focus on security, functionality, integration, interoperability, and usability for the following key reasons:

- Increased People Participation—Human participation in systems at any level is the highest area of cost and potential breakdown for any IT endeavor.

- Lack of Security, Functionality, Integration, Interoperability, and Usability—Lack of excellence in any of these areas will only result in increased human participation in deploying and maintaining IT systems.

- Increased Identity and Security Exposure to Failure—Increased People Participation and Lack of Security, Functionality, Integration, Interoperability, and Usability not only significantly increase costs, but inevitably lead to mistakes and breakdowns. This will create openings for attack and failure.

Thus when KuppingerCole evaluates a set of technologies or products from a given vendor, the degree of product Security, Functionality, Integration, Interoperability, and Usability which the vendor has provided is of highest importance. This is because lack of excellence in any or all of these areas will lead to inevitable identity and security breakdowns and weak infrastructure.

4. Vendor Rating

For vendors, additional ratings are used as part of the vendor evaluation. The specific areas we rate for vendors are

- Innovativeness
- Market position
- Financial strength
- Ecosystem

Innovativeness – this is measured as the capability to drive innovation in a direction which aligns with the KuppingerCole understanding of the particular market segment(s) the vendor is in. Innovation has no value by itself but needs to provide clear benefits to the customer. However, being innovative is an important factor for trust in vendors, because innovative vendors are more likely to remain leading-edge. An important element of this dimension of the KuppingerCole ratings is the support of standardization initiatives if applicable. Driving innovation without standardization frequently leads to lock-in scenarios. Thus active participation in standardization initiatives adds to the positive rating of innovativeness.

Market position – measures the position the vendor has in the market or the relevant market segments. This is an average rating over all markets in which a vendor is active, e.g. being weak in one segment doesn't lead to a very low overall rating. This factor takes into account the vendor's presence in major markets.

Financial strength – even while KuppingerCole doesn't consider size to be a value by itself, financial strength is an important factor for customers when making decisions. In general, publicly available financial information is an important factor therein. Companies which are venture-financed are in general more likely to become an acquisition target, with massive risks for the execution of the vendor's roadmap.

Ecosystem – this dimension looks at the ecosystem of the vendor. It focuses mainly on the partner base of a vendor and the approach the vendor takes to act as a "good citizen" in heterogeneous IT environments.

5. Vendor Coverage

KuppingerCole tries to include all vendors within a specific market segment in their Leadership Compass documents. The scope of the document is global coverage, including vendors which are only active in regional markets like Germany or the US.

However, there might be vendors which don't appear in a Leadership Compass document due to various reasons:

- Limited market visibility: There might be vendors and products which are not on our radar yet, despite our continuous market research and work with advisory customers. This usually is a clear indicator of a lack in Market Leadership.

- Denial of participation: Vendors might decide on not participating in our evaluation and refuse to become part of the Leadership Compass document. KuppingerCole tends to include their products anyway as long as sufficient information for evaluation is available, thus providing a comprehensive overview of leaders in the particular market segment.

- Lack of information supply: Products of vendors which don't provide the information we have requested for the Leadership Compass document will not appear in the document unless we have access to sufficient information from other sources.

- Borderline classification: Some products might have only small overlap with the market segment we are analyzing. In these cases we might decide not to include the product in that KuppingerCole Leadership Compass.

The target is providing a comprehensive view of the products in a market segment. KuppingerCole will provide regular updates on their Leadership Compass documents.

6. Market Segment

This KuppingerCole Leadership Compass looks at the category of Identity Provisioning systems. Identity Provisioning products as we know them today are mostly organized around those four components:

- Connectors
- Reconciliation engine coupled with a repository engine
- Workflow engine
- Form generator to handle graphical user interface

Identity Provisioning products today typically provide some basic, sometimes also some more evolved, access governance functionality. This includes, for example, role management and reporting. Other typical features are user self-service, delegated administration, and password management. In addition to this, configurable workflows for request procedures and approvals are a key element.

It is impossible to understand Identity Provisioning complexity without having a quick look backward. Most historical Identity Provisioning products in the market date back to the late 1990's and early 2000's. They were designed back then and have evolved over time. That was the time of central authentication repositories and meta-directories, and the area of three-tier web architectures. In fact those years fit with the explosion of distributed systems IT departments had to handle. On one hand the number of systems (servers, desktops, applications, network hardware, etc.) to control was growing exponentially, while the number of skilled system administrators wasn't growing at the same rate. On the other hand the number of requests from business units to add new users, grant privileges, enforces policies etc. was exploding. Last but not least everything had to be executed faster and faster and served at a lower cost.

As a result early Identity Provisioning systems were designed to help automate systems administration of IT. Before Identity Provisioning, it was common to wait days or even weeks for a user to get an account on a mainframe resource or application. With Identity Provisioning, business owners became able to serve end-user requests almost in real time from a small web interface, this without asking the permission of any IBM mainframe administrator.

For those reasons, the first Identity Provisioning systems started to focus on connectivity with targeted systems: how to populate a user on an IBM-3270, how to enable someone on Cisco's VPN, … Obviously as soon as the system administration bottleneck was handled, the problem moved to the next level. As it was now simple to grant access to any resource, users had accounts on multiple systems, and the issue moved from "how do I grant access to John on this or that system ?" to "how do I control what John has access to ?". To verify that grants were given on purpose, Identity Provisioning introduces the concept of workflow to verify authorizations before accepting a request. Then in order to keep track of allocated resources a central repository was built, couple with a reconciliation engine.

Last but not least as requests were now handled directly by business owners or end-users, traditional command lines became a "no go" option and a friendly GUI interface became one of the most important components of any Identity Provisioning implementation.

In recent years, compliance and basic access governance functions became a must have feature. Many regulations such as Sarbanes-Oxley, Gramm-Leach-Bliley, EU Privacy Protection Directive, etc. moved the responsibility of enforcing identity management policies from system and business administrators to the top management. As a direct result, key requirement for Identity Provisioning moved from "how to quickly enable my business?" to "how to make sure no one can sue me?" That put new challenges on Identity Provisioning.

With Access Governance, a new product category appeared that somewhat overlaps and somewhat integrates with classical Identity Provisioning (#70,219 Access Governance Architectures). While it remains obvious that – whatever some vendors claim – the provisioning requirement is not going to be disappear any time soon, but will continue to change.

When looking at Identity Provisioning in that Leadership Compass, our expectations are that products provide mature basic capabilities as defined at the beginning of this section plus sufficient role management and basic access recertification capabilities. We don't necessarily expect full Access Governance functionality, i.e. access analytics, recertification, risk management, and related features. We also don't expect what some vendors call Access Intelligence, i.e. advanced analytical capabilities beyond what is commonly found in Access Governance products.

We also expect products to provide a strong and flexible internal security model, flexibility in customization, and other standard features any software product should provide like the ability not to lose customizations when updating a product.

7.   Specific features analyzed

When evaluating the products, besides looking at the aspects of

- overall functionality
- size of the company
- number of customers
- number of developers

- partner ecosystem
- licensing models
- traditional core features of Identity Provisioning

we also considered some specific features. These include:

Connector toolkit	A toolkit for simple creation of custom connectors to target systems is highly recommended.
Heritage of connectors	Having connectors as OEM components or provided by partners is considered a risk for ongoing support and available know-how at the vendor.
ESB interfaces	Having interfaces to ESBs (Enterprise Service Bus) adds architectural options for integrating Identity Provisioning with existing systems and for connecting to target systems.
SRM interfaces	We expect that systems provide out-of-the-box integration to leading SRM (Service Request Management) systems for manual fulfillment of provisioning requests.
SPML/SCIM support	Support for these two standards (Service Provisioning Markup Language/ System for Cross-domain Identity Management) is highly recommended.
Deployment models	Supporting different deployment models like hard/soft appliances and cloud deployment gives customer a broader choice.
Customization	Systems that require little or no coding and that support scripting or, if programming is required, a range of programming languages, are preferred.
Authentication mechanisms	We expect Identity Provisioning systems to support different types of authentication to the system, including strong authentication options, to limit the risk of fraud using these systems.
Internal security model	All systems are required to have a sufficiently strong and fine-grained internal security model.

Multi tenancy	Given the increasing number of cloud deployments, but also specific requirements in multi-national and large organizations, support for multi-tenancy is highly recommended.
Role/SoD concept	Provisioning should be feasible based on role concepts and with support for the definition of SoD rules (Segregation of Duties), despite the fact that Access Governance tools are increasingly used on top of Identity Provisioning.
Shopping cart paradigm	These approaches are pretty popular for simplifying the access request management process by using shopping cart paradigms familiar to the users.

The support for these functions is added to our evaluation of the products. We've also looked at specific USPs (Unique Selling Propositions) and innovative features of products which distinguish them from other offerings available in the market.

8.   Market Leaders

Based on our evaluation of the products, we've identified (as mentioned above) different types of leaders in the Identity Provisioning market segment. The market leaders are shown in figure 1.
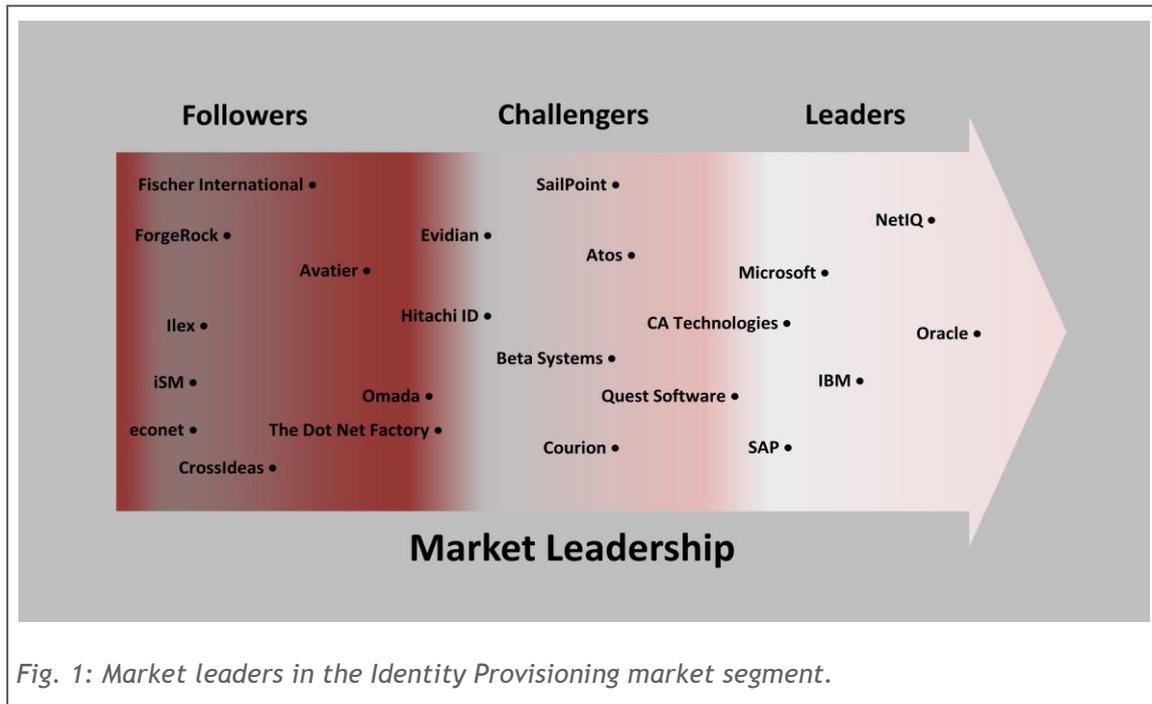

Fig. 1: Market leaders in the Identity Provisioning market segment.

The market is affected by a situation where several very large software vendors compete with a large number of smaller vendors, which, frequently, are only acting regionally. Market leadership is mainly a hint at the overall position of the vendor, its strength in sales, and its partner ecosystem. It has to be noted that this doesn't allow any conclusion about whether the products of the different vendors fit to the customer requirements.

9.   Product Leaders

The second view we provide is about product leadership. That view is mainly based on the analysis of product features and the overall capabilities of the various products.
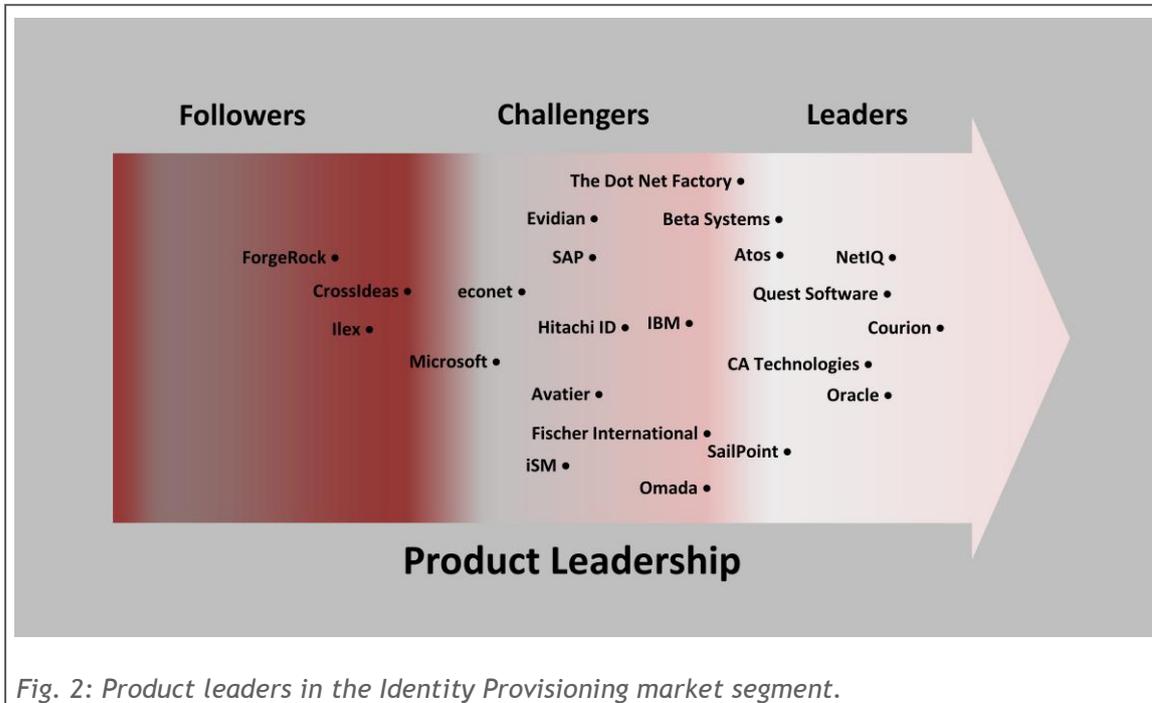
Fig. 2: Product leaders in the Identity Provisioning market segment.

Here it has to be noted that products which appear more at the left side frequently gained their rating because they take another approach to Identity Provisioning than usual. That is particularly true for vendors like CrossIdeas, Ilex, econet, Avatier, or even Evidian.

Again, to select a product it is important to look at the specific features and map them to the customer requirements. There are sufficient examples where products which weren't "feature leaders" still were the better fit for specific customer scenarios.

10. Innovation Leaders

The third angle we took when evaluating products was about innovation. Innovation is, from our perspective, a key capability in IT market segments. Innovation is what customers require to receive new releases that meet new requirements. Thus, a look at innovation leaders is also important, beyond analyzing product features.
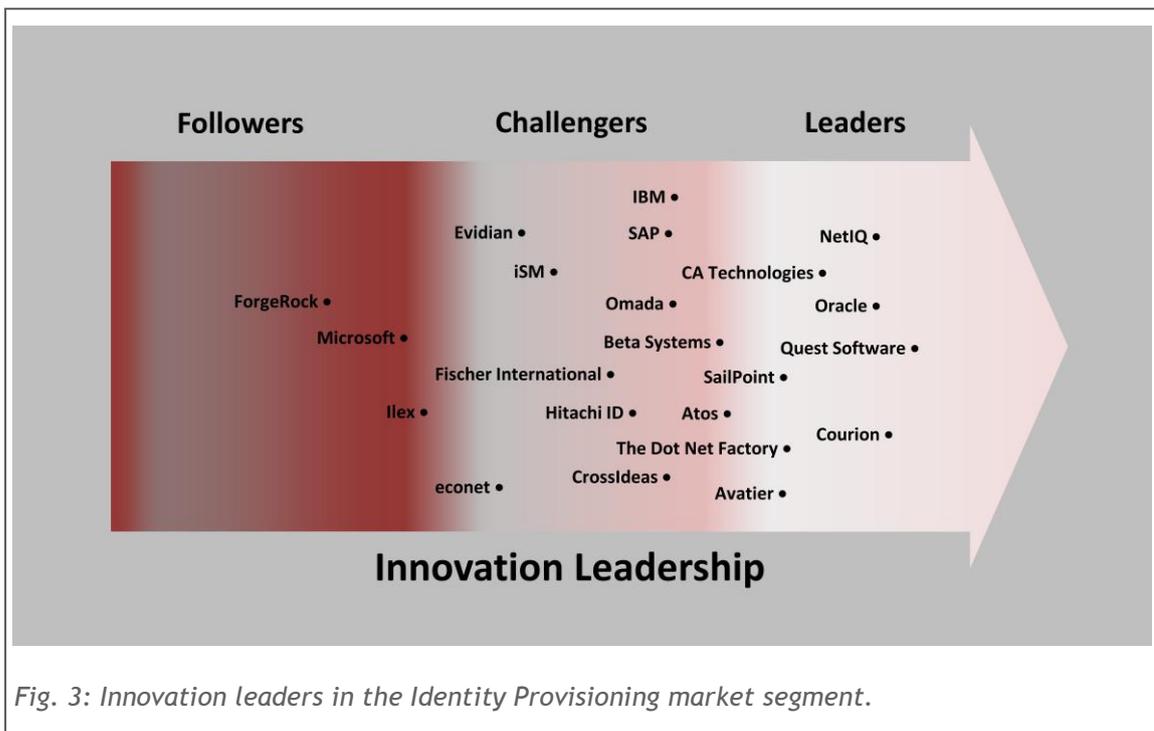

Fig. 3: Innovation leaders in the Identity Provisioning market segment.

Again, in some cases products which appear more to the left of that figure do not necessarily fail in innovation but are focused on specific requirements or very focused approaches, like Evidian with their focus on a more complete solution for SMBs and their tight integration of Access Management, Single Sign-On, and Identity Provisioning or Ilex with their toolset approach for quickly developing IAM applications plus a specific solution for the needs of SMBs.

11. Product evaluation

This section contains a quick rating for every product we've included in this KuppingerCole Leadership Compass document. For many of the products there are additional KuppingerCole Product Reports available, providing more detailed information.

11.1 Identity Manager from NetIQ

Identity Manager from NetIQ is the former Novell Identity Manager which became part of NetIQ after the acquisition of Novell by The Attachmate Group. The product is amongst the ones with the largest user bases globally. It is very mature, supporting a broad range of target systems with specific connectors. Identity Manager is clearly targeted as an Identity Provisioning product with integrated role management and reporting capabilities. NetIQ also offers a stand-alone Access Governance Suite that is tightly integrated with Identity Manager for full Access Governance capabilities.

Strengths/Opportunities	Weaknesses/Threats
Very large customer base and ecosystem. Strong, mature functionality covering all major aspects of Identity Provisioning. Strong support for a variety of target systems.	Limited out-of-the-box Access Governance functionality but tightly integrated with NetIQ Access Governance Suite. Rich functionality sometimes complex to understand.

Table 31: Identity Manager from NetIQ major strengths and weaknesses.

For extended Access Governance requirements, NetIQ offers its Access Governance suite which integrates Identity Manager with SailPoint IdentityIQ as the additional Access Governance product – sold as NetIQ Access Governance Suite. When looking at Identity Manager and its functionality, the breadth of available functionality is somewhat complex when starting to work with the product. On the other hand, NetIQ provides sophisticated tools to create and manage the Identity Provisioning environment, which go well beyond what many other vendors are offering.

Security	strong positive
Functionality	strong positive
Integration	positive
Interoperability	positive
Usability	positive

Table 32: Identity Manager from NetIQ rating.

Overall, Identity Manager from NetIQ remains a leading-edge product in the Identity Provisioning market segment with its broad, mature functionality.

12. Products at a glance

Based on our evaluation, a comparative overview of the ratings of all the products covered in this document is shown in table 45.

Product	Security	Functionality	Integration	Interoperability	Usability
Atos DirX Identity	strong positive	positive	positive	positive	neutral
Avatier Identity and Access Risk Management Suite	positive	positive	positive	neutral	positive
Beta Systems SAM Enterprise Identity Management Suite	strong positive	strong positive	neutral	positive	positive
CA IdentityMinder	strong positive	strong positive	positive	positive	positive
Courion Access Risk Management Suite	strong positive	strong positive	positive	positive	positive
CrossIdeas IDEAS	strong positive	neutral	neutral	neutral	neutral
econet cMatrix	strong positive	positive	positive	positive	neutral
Evidian Identity & Access Manager	strong positive	positive	positive	positive	neutral
Fischer Automated Role & Account Management	strong positive	positive	positive	positive	strong positive
ForgeRock OpenIDM	positive	neutral	positive	positive	neutral
Hitachi ID Management Suite	strong positive	positive	positive	positive	neutral
IBM Security Identity Manager	strong positive	positive	positive	positive	neutral
ILEX Meibo/MPP	positive	positive	positive	neutral	positive
iSM bi-Cube	strong positive	positive	positive	neutral	positive
Microsoft Forefront Identity Manager	strong positive	neutral	positive	neutral	neutral
Identity Manager from NetIQ	strong positive	strong positive	positive	positive	positive
Omada Identity Suite (based on Microsoft FIM)	strong positive	positive	positive	positive	positive
Oracle Identity Manager	strong positive	strong positive	positive	positive	positive
Quest One Identity Manager	strong positive	strong positive	positive	positive	strong positive
SailPoint IdentityIQ	strong positive	strong positive	positive	positive	positive
SAP NetWeaver Identity Management	strong positive	strong positive	positive	positive	neutral
The Dot Net Factory EmpowerID	strong positive	positive	positive	positive	positive

Table 45: Comparative overview of the ratings for the product capabilities.

In addition we provide in table 46 an overview which also contains four additional ratings for the vendor, going beyond the product view provided in the previous section. While the rating for Financial Strength applies to the vendor, the other ratings apply to the product.

Vendor	Innovativeness	Market Position	Financial Strength	Ecosystem
Atos	positive	positive	strong positive	neutral
Avatier	strong positive	positive	positive	neutral
Beta Systems	positive	positive	positive	positive
CA Technologies	positive	positive	strong positive	positive
Courion	positive	positive	positive	neutral
CrossIdeas	positive	neutral	neutral	neutral
Econet	neutral	critical	critical	critical
Evidian	positive	positive	strong positive	neutral
Fischer International	positive	neutral	positive	neutral
ForgeRock	neutral	neutral	neutral	neutral
Hitachi ID	positive	neutral	strong positive	neutral
IBM	positive	strong positive	strong positive	strong positive
ILEX	neutral	critical	neutral	neutral
iSM	positive	critical	neutral	critical
Microsoft	neutral	strong positive	strong positive	strong positive
NetIQ	positive	strong positive	strong positive	strong positive
Omada	positive	neutral	positive	neutral
Oracle	positive	strong positive	strong positive	strong positive
Quest Software	strong positive	positive	strong positive	positive
SailPoint	positive	positive	positive	positive
SAP	positive	positive	strong positive	positive
The Dot Net Factory	positive	positive	neutral	neutral

Table 46: Comparative overview of the ratings for vendors.

Table 46 requires some additional explanation regarding the "critical" rating.

In the area of Innovativeness, this rating is applied if vendors provide none or very few of the more advanced features we have been looking for in that analysis, like support for multi-tenancy, shopping cart approaches for requesting access, and others.

These ratings are applied for *Market Position* in the case of vendors which have a very limited visibility outside of regional markets like France or Germany or even within these markets. Usually the number of existing customers is also limited in these cases.

In the area of *Financial Strength*, this rating applies in case of a lack of information about financial strength or for vendors with a very limited customer base, but also based on some other criteria. This doesn't imply that the vendor is in a critical financial situation; however the potential for massive investments for quick growth appears to be limited. On the other hand, it's also possible that vendors with better ratings might fail and disappear from the market.

Finally, a *critical* rating regarding *Ecosystem* applies to vendors which have no or a very limited ecosystem with respect to numbers and regional presence. That might be company policy, to protect the own consulting and system integration business. However our strong believe is that growth and successful market entry of companies into a market segment relies on strong partnerships.

Beyond that analysis, we've compared the position of vendors regarding combinations of our three major areas of analysis, i.e. market leadership, product leadership, and innovation leadership. That analysis provides additional information.
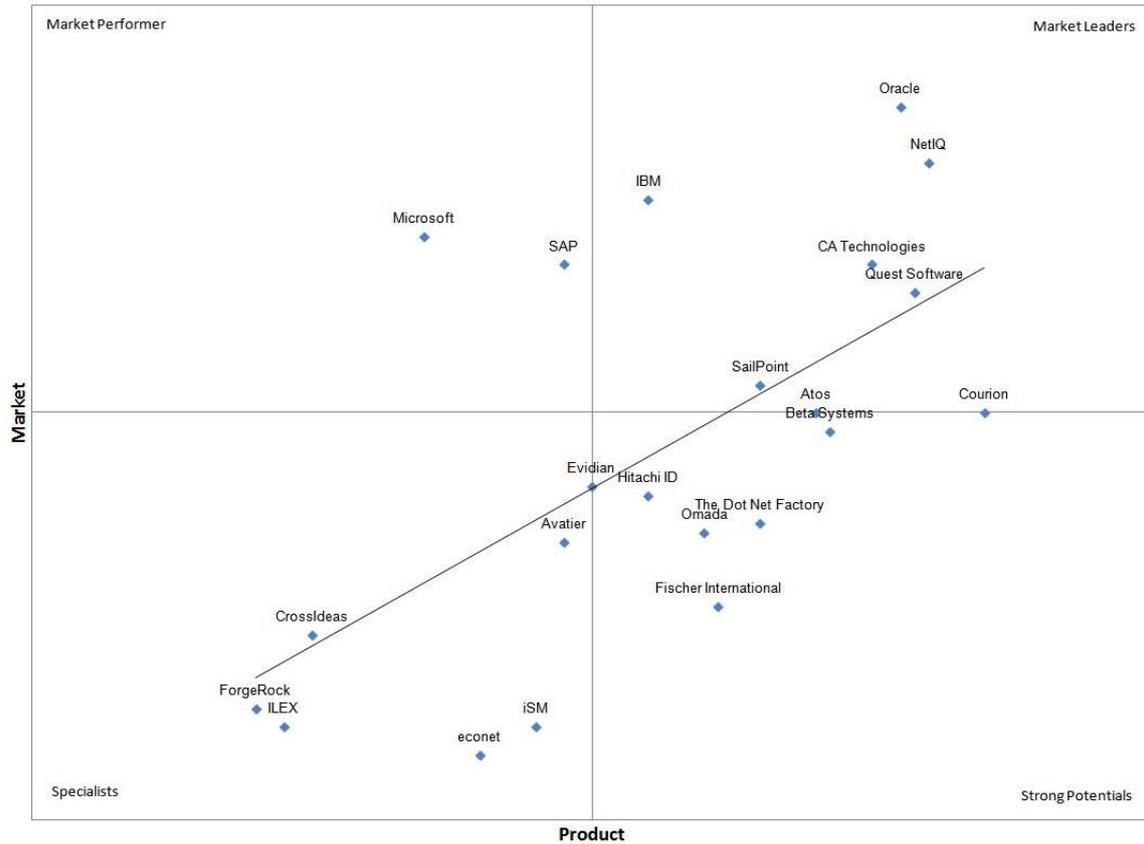
Fig. 4: The Market/Product Matrix. Vendors below the line have a weaker market position than expected according to their product maturity. Vendors above the line are sort of "overperformers" when comparing Market Leadership and Product Leadership.

In that comparison it becomes clear which vendors are better positioned in our analysis of Product Leadership compared to their position in the Market Leadership analysis. Vendors above the line are sort of "overperforming" in the market. It comes as no surprise that these are mainly the very large vendors, while vendors below the line frequently are innovative but focused on specific regions.

We've defined four segments of vendors to help in classifying them:

Market Leaders: This segment contains vendors which have a strong position in our categories of Product Leadership and Market Leadership. These vendors have an overall strong to excellent position in the market.

Strong Potentials: This segment includes vendors which have strong products, being ranked high in our Product Leadership evaluation. However, their market position is not as good. That might be caused by various reasons, like a regional focus of the vendors or the fact that they are niche vendors in that particular market segment.

Market Performers: Here we find vendors which have a stronger position in Market Leadership than in Product Leadership. Typically such vendors have a strong, established customer base due to other market segments they are active in.

Specialists: In that segment we typically find specialized vendors which have – in most cases – specific strengths but neither provide full coverage of all features which are common in the particular market segment nor count among the software vendors with overall very large portfolios.
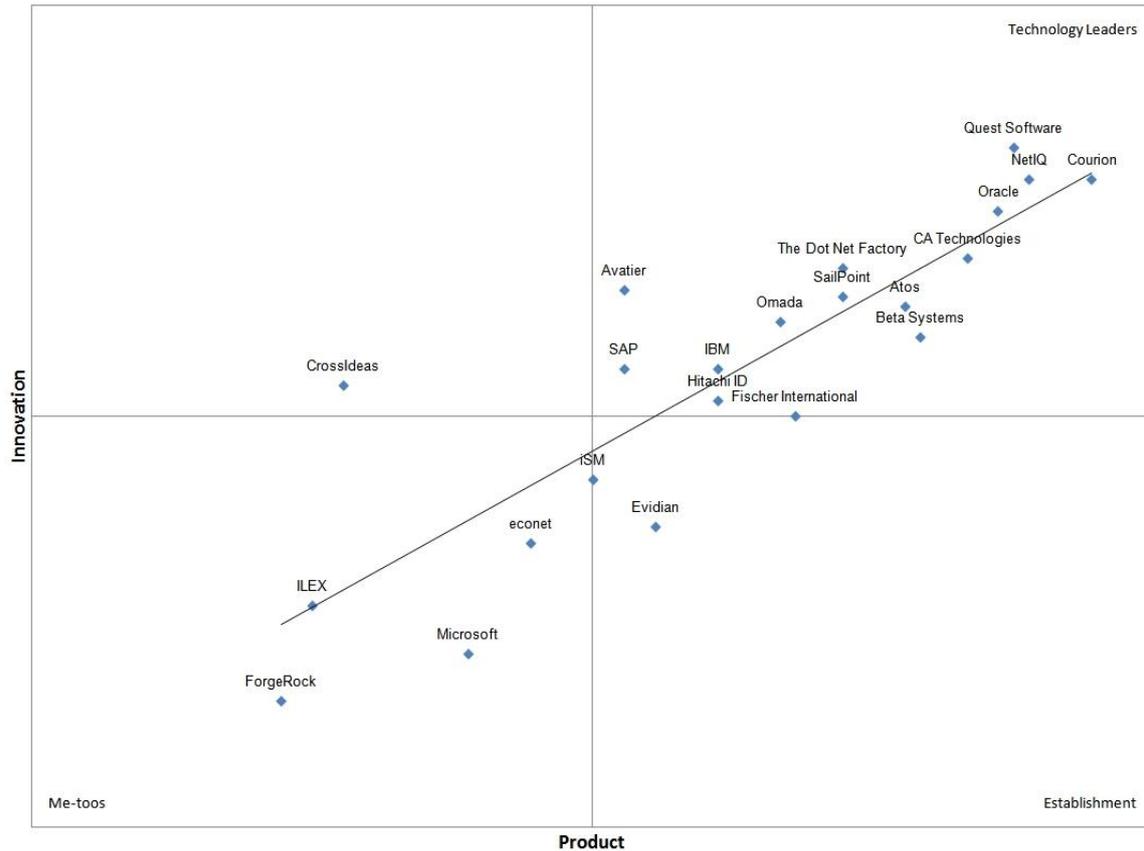
Fig. 5: The Product/Innovation Matrix. Vendors below the line are less innovative, vendors above the line are, compared to the current Product Leadership positioning, more innovative.

This view shows how Product Leadership and Innovation Leadership are correlated. It is not surprising that there is a pretty good correlation between the two views with few exceptions. This distribution and correlation is typical for mature markets with a significant number of established vendors plus a number of smaller vendors.

Again we've defined four segments of vendors. These are

Technology Leaders: This group contains vendors which have technologies which are strong regarding their existing functionality and which show a good degree of innovation.

Establishment:	In that segment we typically find vendors which have a relatively good position in the market but don't perform as strong when it comes to innovation. However, there are exceptions if vendors take a different path and focus on innovations which are not common in the market and thus do not count that strong for the Innovation Leadership rating.
Innovators:	Here we find highly innovative vendors with a limited visibility in the market. It is always worth having a look at this segment because vendors therein might be a fit especially for specific customer requirements.
Me-toos:	This segment mainly contains those vendors which are following the market. There are exceptions in the case of vendors which take a fundamentally different approach to provide specialized point solutions. However, in most cases this is more about delivering what others have already created.
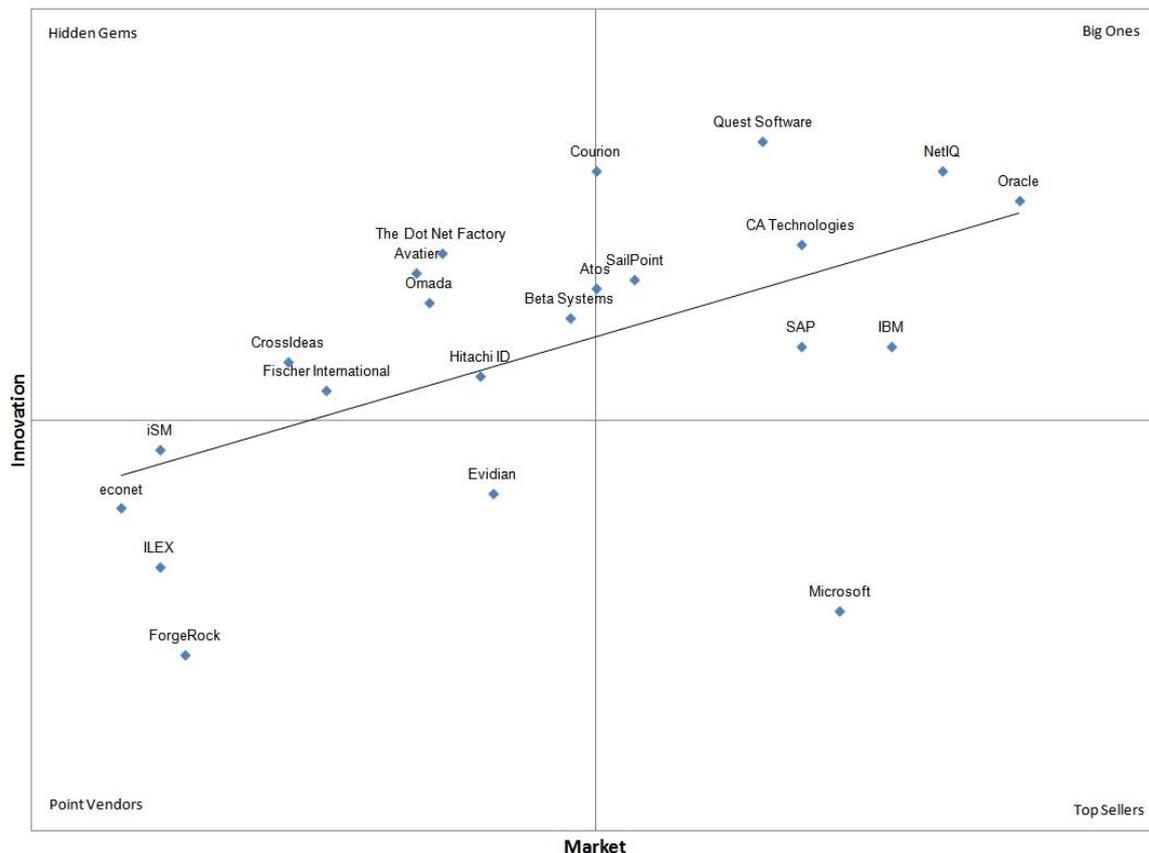
Fig. 6: The Innovation/Market Matrix. Vendors are performing well in the market compared to their relative weak position in the Innovation Leadership rating, while vendors above the line show based on their ability to innovate, the biggest potential for improving their market position.

The third relation shows how Innovation Leadership and Market Leadership are related. Some vendors might perform well in the market without being Innovation Leaders. This might impose a risk for their future position in the market, depending on how they improve their Innovation Leadership position. On the other hand, vendors which are highly innovative have a good chance for improving their market position but might also fail, especially in the case of smaller vendors.

The four segments we have defined here are

Big Ones: These are market leading vendors with a good to strong position in Innovation Leadership. This segment mainly includes large software vendors.

Top Sellers: In that segment we find vendors which have an excellent market position compared to their ranking in the Innovation Leadership rating. That can be caused by a strong sales force or by selling to a specific community of "customer customers", i.e. a loyal and powerful group of contacts in the customer organizations.

Hidden Gems: Here we find vendors which are more innovative than it would be expected when looking at their Market Leadership rating. These vendors have a strong potential for growth, however they also might fail in delivering on that potential. Nevertheless this group is always worth a look due to their specific position in the market.

Point Vendors: In that segment we find vendors which typically either have point solutions or which are targeting specific groups of customers like SMBs with solutions focused on these, but not necessarily covering all requirements of all types of customers and thus not being amongst the Innovation Leaders. These vendors might be attractive if their solution fits the specific customer requirements.

Finally, we've put together the three different ratings for leadership, i.e. Market Leadership, Product Leadership, and Innovation Leadership and created an Overall Leadership rating. This is shown below in figure 7.

Fig. 7: The Overall Leadership rating for the Identity Provisioning market segment.
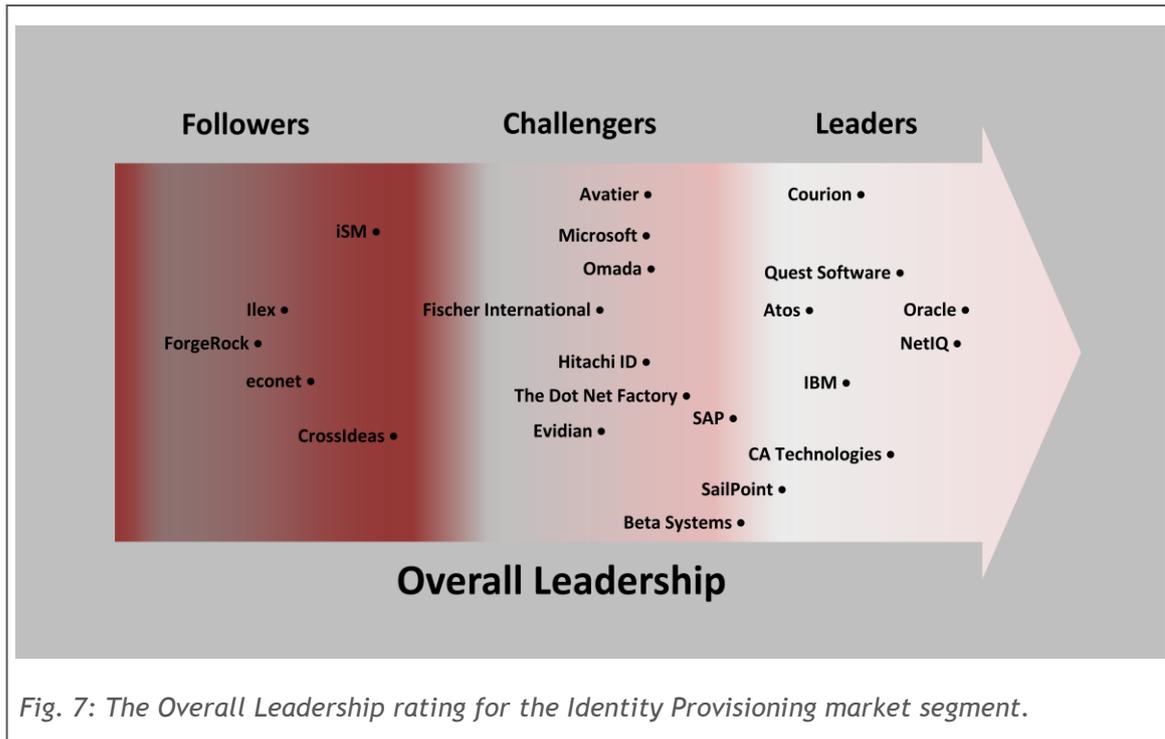
Again: Leadership doesn't automatically mean that these vendors are the best fit for a specific customer requirement. A thorough evaluation of these requirements and a mapping to the features provided by the vendor's products is mandatory.