The Forrester Wave™: Identity And Access Management Suites, Q3 2013

by Andras Cser and Eve Maler, September 4, 2013

KEY TAKEAWAYS

The Old Boundaries Are Gone -- Enterprise Identity And Access Require “Zero Trust”
The need to partner with an ever-increasing variety and number of business partners, consumers, contractors, and vendors without network compartmentalization makes a strong case for automated identity and access management that responds to the needs of the extended enterprise.

Supporting Mobile-Friendly IAM Is A Must
Enterprise and consumer users alike expect IAM functions to work seamlessly on multiple devices and application delivery platforms -- web, mobile web, native mobile applications, and embedded applications -- across organizational boundaries. Support for emerging authentication and authorization protocols and for API security enables this.

Identity Intelligence Protects Against As-Yet-Unseen Threats
Understanding and modeling good and bad user behavior is key to comprehensive access control. What started as risk-based authentication is increasingly growing into a richer form of identity intelligence, and it’s finding its way into user account provisioning and risk-based attestation to protect companies from new and emerging threats.
The Forrester Wave™: Identity And Access Management Suites, Q3 2013

Comparing The Top Nine IAM Suite Options

by Andras Cser and Eve Maler
with Stephanie Balaouras and Heather Belanger

WHY READ THIS REPORT

In Forrester’s 16-criteria evaluation of comprehensive identity and access management (IAM) suites, we identified the nine most significant vendors in the category — Aveksa, CA Technologies, Courion, Dell, IBM, NetIQ, Oracle, Ping Identity, and SecureAuth — and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help security and risk (S&R) professionals select the right partner for their enterprise, business-to-business, and consumer-facing IAM deployments.

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Forrester conducted evaluations from February through June 2013 and interviewed eight vendors and 16 user companies.

Related Research Documents

Navigate The Future Of Identity And Access Management
March 22, 2012

The Forrester Wave™: Role Management And Access Recertification, Q3 2011
August 23, 2011

The Forrester Wave™: User Account Provisioning, Q1 2006
January 30, 2006
IAM IMPROVES SECURITY, REDUCES COSTS, AND SMOOTHES USER EXPERIENCE

Companies need to protect sensitive information — and their failure to institute sufficient identity-based access control has resulted in corporate data losses time and again. Identity and access management (IAM) not only helps to reduce a company’s threat surface, but it’s also vital in reducing the cost of identity administration and the cost of regulatory compliance. Beyond core security and operational functions, IAM can also improve service delivery so that users don’t have to wait as long to reset passwords or obtain access to all the applications they need to do their jobs effectively. Increasingly, IAM solution suites must respond to the changing needs of the modern IT organization by:

- **Offering hybrid deployment models that incorporate cloud and on-premises delivery.** In this Wave, Forrester looked at nine IAM suite vendors and evaluated both their on-premises and their cloud-delivered capabilities. Forrester’s clients frequently tell us that they’re looking for IAM solutions that support SaaS applications along with on-premises applications, and many of them are eager to take advantage of the cost and speed advantages of a cloud footprint for IAM. Often, these clients have built or are considering building an on-premises IAM solution and they want to know how to move that solution to the cloud — but also how they can move their IAM solution back on-premises if needed.

- **Delivering user interfaces that meet ever-higher business user expectations.** In the wake of the consumerization of IT, customers expect to see the same slick and polished user interfaces in enterprise IAM offerings that they’ve grown accustomed to on their personally owned mobile devices. Most vendors have improved their IAM products’ user interfaces so that business users without IT expertise can directly use them. They’ve also added extensive glossaries to hide technical terms, security group names, and cryptic entitlement attributes. A case in point: One vendor represents the Active Directory group “FINORAGENLEDG” to business users as “Write access to the Oracle General Ledger system.” Most vendors have also implemented native mobile applications for access request approvals.

- **Managing consumer-facing access and services to serve the top line of the business.** S&R professionals increasingly find that their marketing organizations push for ease of use in customer authentication. Centralized external-facing IAM plays a critical role in eliminating user authentication and self-service barriers and providing an easy-to-use and secure customer experience.

IAM SUITES EVALUATION OVERVIEW

To assess the state of the IAM suites market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of the top nine vendors.
Evaluation Criteria

After examining past research, user need assessments, and vendor and expert interviews, we developed a set of evaluation criteria. We evaluated vendors against 16 criteria, which we grouped into three high-level groups:

- **Current offering.** We looked at six criteria in this area, including: 1) user account provisioning and identity administration; 2) attestation, separation of duties (SoD), and enterprise role management; 3) web single sign-on (SSO); 4) federation; 5) cloud support; and 6) reporting and prebuilt integration.

- **Strategy.** We looked at eight criteria in this area, including: 1) differentiating and unique features; 2) vendor staffing; 3) future plans; 4) customer satisfaction; 5) partners and implementation ecosystem; 6) multitenancy and solution pricing; 7) integration and OEM relationships; and 8) financials and stability.

- **Market presence.** To establish a fair assessment of the vendor’s mindshare and market penetration, we looked at two criteria in this area: 1) installed base, and 2) verticals.

Evaluated Vendors

Forrester invited nine vendors to participate in the assessment: Aveksa, CA Technologies, Courion, Dell, IBM, NetIQ, Oracle, Ping Identity, and SecureAuth. Although Oracle chose not to participate in this Forrester Wave evaluation, we evaluated Oracle Identity Management based on our knowledge from past analysis and publicly available information so as to provide a complete picture of the competitive landscape.

Each of the vendors has at least one product that: 1) has significant mindshare among Forrester clients and appears on IAM RFP short lists, as demonstrated through the 425 IAM-related inquiries we fielded in 2012; and 2) offers an on-premises deployment model as a perpetual, non-appliance license in at least one of two general categories (see Figure 1):

- **Identity management.** This is a product that can manage and attest identities for users in SaaS and on-premises business applications and user repositories. Forrester evaluated solutions that provide support for access request submission and approval, enterprise job role mining and management, and access governance/attestation campaigns. Solutions had to provide inbound and outbound integration via APIs and interactive dashboards.

- **Runtime policy enforcement of business user access and federation.** “Business user” refers to ordinary users in the enterprise, as opposed to administrators for whom organizations use privileged access management solutions to manage access. Forrester evaluated solutions that support explicit and configurable authentication and authorization policies for web single
sign-on (SSO) and federation. Federation solutions had to provide support for ingesting SAML tokens for third-party providers and just-in-time user mapping.

**Figure 1** Evaluated Vendors: Product Information And Selection Criteria

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product evaluated</th>
<th>Version release date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aveksa</td>
<td>Aveksa Identity and Access Management Platform v.6</td>
<td>December 2012</td>
</tr>
<tr>
<td>Courion Corp.</td>
<td>Courion Access Risk Management Suite 8.1, Courion Access Insight, Identity and Access Intelligence (IAI), 1.0</td>
<td>December 2012, July 2012</td>
</tr>
<tr>
<td>Dell</td>
<td>Dell Quest One Identity Manager, 6.01, Dell Quest One Authorization Policy Server, Dell Quest One Quick Connect for Cloud Services 3.2</td>
<td>August 2012, Fall 2012, December 2012</td>
</tr>
<tr>
<td>IBM</td>
<td>IBM Security Identity and Access Assurance v2.0</td>
<td>December 2012</td>
</tr>
<tr>
<td>Oracle</td>
<td>Oracle Identity Management</td>
<td>October 2012</td>
</tr>
<tr>
<td>Ping Identity</td>
<td>PingFederate v. 6.1, ADConnect, PingOne</td>
<td>September 2012</td>
</tr>
<tr>
<td>SecureAuth</td>
<td>SecureAuth IdP 6.6.1</td>
<td>December 6, 2012</td>
</tr>
</tbody>
</table>

Source: Forrester Research, Inc.

**EVALUATION ANALYSIS**

The evaluation uncovered a market in which (see Figure 2):

- **CA Technologies, NetIQ, and Ping Identity lead the pack.** These vendors showed consistency with leading IAM suites that encompass identity provisioning, attestation, web SSO, and federation. They offer easy-to-use interfaces, a differentiated vision and thought leadership for IAM, and strong execution.
- **Courion, Aveksa, IBM, Oracle, Dell, and SecureAuth offer competitive options.** These vendors represent good offerings for IAM, but they variously lack in some areas of identity management, cloud support, user interface design, policy management, auditing, IAM vision, and strategy execution.

This evaluation of the IAM suite market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

**Figure 2** Forrester Wave™: Identity And Access Management Suites, Q3 ’13

![Diagram showing vendor ranking and criteria evaluation](image-url)
Figure 2 Forrester Wave™: Identity And Access Management Suites, Q3 ’13 (Cont.)

<table>
<thead>
<tr>
<th>CURRENT OFFERING</th>
<th>Aveksa</th>
<th>CA Technologies</th>
<th>Courion</th>
<th>Dell</th>
<th>IBM</th>
<th>NetIQ</th>
<th>Ping Identity</th>
<th>SecureAuth</th>
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</thead>
<tbody>
<tr>
<td>Forrester’s Weighting</td>
<td>50%</td>
<td>3.75</td>
<td>3.80</td>
<td>4.00</td>
<td>2.50</td>
<td>3.35</td>
<td>4.55</td>
<td>4.00</td>
</tr>
<tr>
<td>User account provisioning and identity administration</td>
<td>20%</td>
<td>5.00</td>
<td>4.00</td>
<td>3.00</td>
<td>4.00</td>
<td>4.00</td>
<td>5.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Attestation, SoD, and enterprise role management</td>
<td>15%</td>
<td>4.00</td>
<td>5.00</td>
<td>5.00</td>
<td>3.00</td>
<td>2.00</td>
<td>5.00</td>
<td>5.00</td>
</tr>
<tr>
<td>Web single sign-on</td>
<td>15%</td>
<td>2.00</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00</td>
<td>4.00</td>
<td>4.00</td>
<td>5.00</td>
</tr>
<tr>
<td>Federation</td>
<td>15%</td>
<td>2.00</td>
<td>3.00</td>
<td>3.00</td>
<td>2.00</td>
<td>3.00</td>
<td>4.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Cloud support</td>
<td>20%</td>
<td>4.00</td>
<td>3.00</td>
<td>5.00</td>
<td>4.00</td>
<td>3.00</td>
<td>5.00</td>
<td>5.00</td>
</tr>
<tr>
<td>Reporting and prebuilt integration</td>
<td>15%</td>
<td>5.00</td>
<td>3.00</td>
<td>3.00</td>
<td>1.00</td>
<td>4.00</td>
<td>4.00</td>
<td>2.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>Aveksa</th>
<th>CA Technologies</th>
<th>Courion</th>
<th>Dell</th>
<th>IBM</th>
<th>NetIQ</th>
<th>Ping Identity</th>
<th>SecureAuth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Differentiating and unique features of the solution</td>
<td>10%</td>
<td>4.00</td>
<td>4.00</td>
<td>0.00</td>
<td>1.00</td>
<td>3.00</td>
<td>4.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Vendor staffing</td>
<td>10%</td>
<td>2.00</td>
<td>5.00</td>
<td>1.00</td>
<td>5.00</td>
<td>5.00</td>
<td>5.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Future plans</td>
<td>10%</td>
<td>4.00</td>
<td>4.00</td>
<td>2.00</td>
<td>3.00</td>
<td>5.00</td>
<td>4.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Customer satisfaction</td>
<td>10%</td>
<td>4.00</td>
<td>2.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>3.00</td>
</tr>
<tr>
<td>Partners and implementation ecosystem</td>
<td>10%</td>
<td>4.00</td>
<td>5.00</td>
<td>1.00</td>
<td>2.00</td>
<td>5.00</td>
<td>4.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Multitenancy and solution pricing</td>
<td>15%</td>
<td>3.00</td>
<td>4.00</td>
<td>5.00</td>
<td>1.00</td>
<td>1.00</td>
<td>0.00</td>
<td>2.00</td>
</tr>
<tr>
<td>Integration and OEM relationships</td>
<td>10%</td>
<td>4.00</td>
<td>5.00</td>
<td>1.00</td>
<td>5.00</td>
<td>5.00</td>
<td>5.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Financials and stability</td>
<td>25%</td>
<td>2.00</td>
<td>4.00</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>4.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MARKET PRESENCE</th>
<th>Aveksa</th>
<th>CA Technologies</th>
<th>Courion</th>
<th>Dell</th>
<th>IBM</th>
<th>NetIQ</th>
<th>Ping Identity</th>
<th>SecureAuth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installed base</td>
<td>50%</td>
<td>2.00</td>
<td>4.00</td>
<td>2.00</td>
<td>3.00</td>
<td>1.00</td>
<td>4.00</td>
<td>2.00</td>
</tr>
<tr>
<td>Verticals</td>
<td>50%</td>
<td>2.00</td>
<td>4.00</td>
<td>3.00</td>
<td>3.00</td>
<td>5.00</td>
<td>5.00</td>
<td>2.00</td>
</tr>
</tbody>
</table>

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Demonstrate Comprehensive Coverage In Their IAM Offerings

- CA Technologies provides a well-rounded suite both in the cloud and on-premises. CA Technologies moved from an IAM acquirer to an IAM technology innovator. It improved the user interface of its access governance product, GovernanceMinder, enabled a broad range of attestation use cases, and integrated it with the IdentityMinder provisioning solution. It also provides a leading web SSO solution, SiteMinder, with OAuth v2.0 support, integrated with its own risk-based authentication solution, RiskMinder. CA Technologies also offers CloudMinder,
a cloud IAM solution, which allows customers to move between on-premises and cloud-based IAM architectures seamlessly. The solution today lacks prebuilt provisioning and SSO to a large set of applications, and the company lacks the ability to search and correlate between components of the suite.

- **NetIQ has consistently built a strong stack of IAM products.** The solution provides strong provisioning and identity intelligence capabilities through Sentinel integration, as well as robust capabilities for social login and cloud access. NetIQ is working on creating a dedicated web user interface for end user self-service around access request submission and approval and attestation. It OEMs SailPoint for attestation and access governance. NetIQ today does not provide its own cloud IAM solution; its NetIQ Cloud Security Service (NCSS) solution helps MSSPs create their own cloud IAM offerings. Federation support is native to NetIQ Access Manager and is not available today as a separate product. By design, the solution has an offline provisioning policy and workflow editor, called Designer, which is separate from the web user interface. NetIQ uses eDirectory as an embedded identity vault for NetIQ Identity Manager, and eDirectory also provides real-time event processing.

- **Ping Identity shines at federation and SSO and partners successfully for the rest.** Ping Identity is the only vendor examined in this Forrester Wave with a decade-long success story specifically around standards-based federation, available both as an on-premises product, PingFederate, and more recently as a cloud IAM solution, PingOne. By itself, it does not offer a true suite of IAM functionality. However, by virtue of its partnership with Courion, it gains runtime federation and web SSO features to complement its account provisioning, attestation, SoD, and enterprise role management features. Ping’s native products have sufficient flexibility to support both outbound and inbound web SSO scenarios, and it has become as comfortable with cloud-deployed solutions as on-premises ones. While the company has almost 900 customers, it’s still not profitable and lacks a convincingly broad ecosystem of global system integrator partners.

**Strong Performers Address Most Needs, But Not Always In An Ideal Package**

- **Courion adds unique identity intelligence features on top of its core functions.** By itself, Courion does not offer a true suite of IAM functionality. However, by virtue of its partnership with Ping Identity, it gains runtime federation and web SSO features to complement its account provisioning, attestation, SoD, and enterprise role management features. Its execution and strategy are strongest around identity intelligence features such as heat map and dashboard visualization of risk, including views per line of business, per application, access patterns, and aggregated numbers of requests over time. The solution can be harder to customize, as simple user interface and workflow changes require Courion professional services (the company makes 30% of revenue in professional services). We anticipate that these user experience features will migrate into the core product interface over time.
- **Aveksa provides scalable access governance and OEMs OneLogin for SSO.** On July 1, 2013, Aveksa was acquired by RSA, which will allow RSA to integrate its own, fully functional IAM suite portfolio with the strong financial backing of EMC. The solution, as of December 31, 2012, has one of the best attestation capabilities and performance, and has broad role mining and management and SoD functionality — and Aveksa offers these features both as an on-premises product and as a cloud service. Aveksa OEMs OneLogin’s cloud SSO portal for web access management, data access, and federation, but today lacks support for social login and SDKs for mobile devices — features that are planned for future releases. The access control functionality today is only available as a cloud service; there is no on-premises SSO solution.

- **IBM has comprehensive on-premises features, spread over too many components.** IBM’s IAM suite comprises a long list of individual products: IBM Security Access Manager (ISAM), IBM Security Identity Manager (ISIM), Security Federated Identity Manager Business Gateway (FIM BG), QRadar Security Intelligence Platform, Cognos, and more. These products generally have strong coverage of identity management and access management features; however, they suffer from the need for heavy customization and the lack of a “single pane of glass” centralized administrative interface and policy store. Because of this, customers reported that the user interfaces of ISIM are obsolete-looking and can require extensive customization to map to business processes. IBM’s partner and implementation ecosystem is, of course, both wide and deep, lending strength to its strategic outlook. However, it has not enabled cloud deployment of any of its IAM solutions yet. IBM does partner with Lighthouse Security Group to offer a slick user interface in front of cloud-hosted ISIM and ISAM services.

- **Oracle eliminates the pain of counting licensed users and further integrates OIA and OIM.** Oracle has the broadest adoption of all IAM products worldwide. Oracle also offers CPU-based licensing for its products, which can alleviate the concerns around counting active users in various user stores. The provisioning component, Oracle Identity Management (OIM), and the attestation component, Oracle Identity Analytics (OIA), have both undergone user interface and performance improvements, but customers still tell Forrester that the suite components feel like distinct products in need of greater integration. Oracle Access Management integrates well with Oracle Adaptive Access Manager, which brings risk-based and two-factor authentication to the suite. Oracle today does not have a cloud IAM offering, despite the fact that it provides implicit IAM functionality for its Oracle Cloud business applications.

- **Dell consolidates its IAM acquisition assets and looks at adaptive authorization.** Dell has acquired Quest Software, which in turn has recently added a broad range of heterogeneous IAM products to its legacy Windows Active Directory (AD) administration product base: Voelcker Informatik for provisioning and attestation, Symlabs for federation and virtual directories, BiTKOO for entitlement management and access control, and e-DMZ for privileged identity management. Dell today has no cloud IAM offering and will undoubtedly face pressure from its customers to integrate its acquired IAM product sets into a coherent IAM suite portfolio with components that share policy stores and an auditing framework.
The Contender Has An Access Management Specialty, Not A Suite

- **SecureAuth** offers **competent federation and web SSO but isn't a full suite.** SecureAuth is comfortable in the federated access management space, with an on-premises offering that enables both outbound and inbound SSO. It offers a nice user interface for mobile access and two-factor authentication support. Its development team and partner ecosystem are small but are punching above their weight with relative success. The solution offers risk-based authentication, social login, and integration with Box, Dropbox, and other SaaS applications. However, the solution currently does not support access request management, attestation, and role management. It would benefit greatly from a deep partnership for identity management functionality.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Product demos and unsupervised usage.** We asked vendors to conduct in-depth demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities. We also gained unsupervised access to environments in which we could test the products’ features.

- **Customer reference calls and surveys.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor’s current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don’t fit the scope of our evaluation.
After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

1 Forrester’s security and risk (S&R) team fields hundreds of inquiries every month. We use these inquiries as a barometer to track client challenges and to gauge client interest in the various topics we cover; this is a key source of input as we plan our future research agenda. For more information, see the June 26, 2013, “Inquiry Spotlight: Security And Risk, Q1 To Q4 2012” report.
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To help your firm capitalize on new business opportunities safely, you must ensure proper governance oversight to manage risk while optimizing security processes and technologies for future flexibility. Forrester’s subject-matter expertise and deep understanding of your role will help you create forward-thinking strategies; weigh opportunity against risk; justify decisions; and optimize your individual, team, and corporate performance.

Sean Rhode S, client persona representing Security & Risk Professionals