Gartner

Research

Publication Date: 7 November 2003 **ID Number: COM-21-4534**

The Identity and Access Management Market Landscape

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Integrating identity and access management components into an overall solution is time-consuming and costly. Choose your first component and vendor wisely; this decision can determine the success of your IAM project.

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WHAT YOU NEED TO KNOW

Identity and access management product integration costs can be from two to six times the cost of the software license fee. Reduce those costs by looking for a vendor that has an IAM product suite or has integrated other IAM vendors' products with a common identity administration facility. The vendor should assume contract management and customer support for the other vendors' licensed products that complete its IAM product suite.

STRATEGIC PLANNING ASSUMPTION(S)

By 2005, the complexity of integrating the components of IAM solutions will cause 60 percent of enterprises to choose product suites that are owned or licensed by, and supported through, one vendor (0.7 probability).

By year-end 2004, password management vendors that don't provide user-provisioning products will go out of business (0.8 probability).

By 2005, EAM vendors that don't provide enterprise identity administration functions or products, or comprehensive IAM suites (or partner solutions), will disappear (0.8 probability).

ANALYSIS

The component with which to start your identity and access management (IAM) implementation depends on your initial "pain point":

- If the help desk call volume related to forgotten passwords (such as account lockout) is 30 percent or more, consider a password management or single sign-on product.
- If you are implementing your first customer-oriented, browser-based application, an extranet access management (EAM) product is critical.
- If you have user accounts that have not been used for more than six months, and the person who is assigned to those accounts hasn't worked for the enterprise for a year, pursue a user-provisioning product.
- If passwords are not strong enough authentication for a business function (for example, database administrator or systems administrator access), consider a strong authentication product, such as tokens or biometrics.

Once you implement the first component, choosing the next component from the right vendor is critical. Although part of this decision will depend on your next pain point, focus on how well the vendor can integrate with your IAM product implementations so that all user access — not just internal or external — can be managed from a common facility. Because of this growing requirement in the marketplace, IAM customers are migrating to a single-vendor or product suite approach. Although customers aren't buying and implementing all components simultaneously, they want to know that the components will work together with little integration effort when required. By 2005, the complexity of integrating the components of IAM solutions will cause 60 percent of enterprises to choose product suites that are owned or licensed by, and supported through, one vendor (0.7 probability).

In addition to this product suite buying pattern, IAM customers want one-stop shopping for contract management and customer support of all underlying components. Also, in this uncertain economy, purchasing solutions in information security is risky because security vendors may fail,

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merge or change direction, which leaves the buyer without support. Thus, IAM customers are looking for a vendor that will support them in the long term.

IAM Market Landscape Matrix

Table 1 is a market product survey of vendors and their IAM components that you can use as a guide to create or expand your IAM road map. An "X" indicates that the vendor has a separately sold product for an IAM component (see "Identity and Access Management Defined"):

- Authorization services
- Directory services
- Enterprise single sign-on
- Password management
- User provisioning
- Metadirectory
- EAM — operating system (OS), Web or database management system (DBMS)
- Audit
- Portal
- Application server

Partnerships are noted with the name of the vendor. The list of partners represents those known at the corporate level; there may be others that are not listed here that are point or one-off partnerships done in the field for specific engagements. Original equipment manufacturer (OEM) and software licensing arrangements are noted with the OEM vendor in parentheses — for example, X (BL).

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Table 1. IAM Market Landscape Matrix

Vendor	Auth. Svcs.	Dir. Svcs.	Ent. SSO	Pswd. Mgmt.	User Prov.	Meta-dir.		EAM		Audit	Portal	App. Svr.
							OS	Web	DBMS			
Abridean					X							
ActivCard (ACTV)	X	MSFT NOVL SIE Sun	X	X			X	X				
ASG Software Solutions			Okiok	X	X	RL		Okiok		X		
BEA Systems					WV	RL		X			X	X
Beta Systems Software			SECUDE	PRG	X		X					
BHOLD	bTRST ENTU RSA VASCO RSA	MSFT NOVL	X	X	X	MSFT NOVL SIE	X	HP	X	X	X	
Blockade Systems (BLKD)	VASCO RSA			X	X	MSFT	X	ENTU IBM WPRO				
Blue Lance										X		
BMC Software			PLX	X	X	RL		OBLX NETE		Consul		
BNX Systems	X	MSFT	X	Thor WV	IBM Thor WV	MSFT	IBM MSFT	ENTU NETE				

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Business Layers (BL)	**SLB**	**CP MSFT NOVL Sun**		**X**	**X**	**MaXw MSFT NOVL**	**MSFT NOVL Sun**	**NETE ONET RSA**	**MSFT**			**BEA**
Computer Associates International (CA)	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**BEA IBM**
Citrix Systems (CTXS) (Citrix product stack only)			**X (PLX)**								**X**	
Communicator Inc. (functionality offered as a service)	**X**		**X**					**X**			**X**	
Consul Risk Management					**BMC**		**X**			**X**		
Courion (CRN)	**RSA**			**X**	**X**	**MSFT**		**OBLX RSA**		**Consul**		
Critical Path, Inc. (CP)		**X**		**X**		**X**						
Entegrity Solutions								**X**				
Entrust (ENTU)	**X-PKI only**	**CP MSFT NOVL ORCL Sun**	**X PLX**	**WV**	**WV**	**WV**		**X**			**BEA IBM PLM Sun TIBCO**	**BEA IBM Lotus/ IBM ORCL Sun**
Evidian	**X**		**X**	**X**	**X**	**CAL CP**	**X**	**X**	**X**	**X**	**BEA IBM Sun**	**BEA IBM Sun**

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Hewlett-Packard (HP)	**X ENTU Identix MSFT RSA**	**CP MSFT NOVL Sun**	**RSA**	**CRN MSFT MTech**	**CRN MTech NETE ONET WV**	**X CP MaXw MSFT NOVL RL SIE WV**		**X ENTU NETE ONET**		**X**	**BEA MSFT ORCL TIBCO VIGN**	**BEA MSFT ORCL**
IBM/Tivoli (IBM)	**X**	**X**	**X**		**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
Imprivata			**X**									
MaXware International (MaXw)						**X**						
Microsoft (MSFT)	**X**	**X**		**BLKD MTech**	**X**	**X**	**X**	**NETE OBLX ONET**			**X**	**X**
M-Tech Identity Management Solutions (MTech)	**RSA**			**X**	**X**	**MSFT**		**OBLX RSA**				
Netegrity (NETE)		**CP MSFT ORCL**			**X (BL)**	**CP MSFT**	**MSFT**	**X**			**BEA IBM PLUM ORCL**	**BEA IBM**
NetIQ				**X**	**X**					**X**		
Novadigm					**X**							
Novell (NOVL)	**X**	**X**	**(PROT)**	**X**	**X**	**X**		**X**		**X**	**X**	**X**
Oblix (OBLX)	**ACTV ENTU MSFT RSA**	**CP MSFT NOVL Sun**	**PLX**	**X BMC MTech**	**BMC MSFT**	**MSFT**	**MSFT**	**X**			**BEA IBM MSFT PLUM ORCL VIGN**	**BEA IBM MSFT**
OctetString						**X**						

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Open Systems Management					**X**	**MSFT**						
Open Network (ONET)	**(MSFT)**	**(MSFT)**	**CTXS PLX**	**X**	**X (MSFT) Thor WV**	**(MSFT)**	**(MSFT)**	**X**			**MSFT**	**MSFT**
Oracle (ORCL) (Oracle product stack only)	**X-PKI only**	**X**		**X-AD**	**X**			**X-SSO only**	**X**		**X**	**X**
PassGo Technologies	**X**		**X**	**X**			**X-Unix only**	**X**				
Passlogix (PLX)	**ENTU NEC RSA SFLNK SLB**	**IBM MSFT NOVL Sun**	**X**		**BMC MSFT Thor**	**MSFT Sun**	**CTXS IBM MSFT Sun**	**ENTU NETE OBLX ONET RSA**			**CTXS**	
PistolStar				**X**				**X-SSO only**				
Proginet (PRG)				**X**								
Protocom Development Systems (PROT)	**X**	**NOVL**	**X**	**X**	**NOVL**	**NOVL**		**NOVL**		**NOVL**		
Radiant Logic (RL)						**X**						
RSA Security (RSA)	**X**	**MSFT NOVL ORCL Sun**	**X**	**BMC CRN MTech Thor WV**	**BL BMC CRN MTech Thor WV**	**CP Fisch NOVL RL SIE SYNT**		**X**			**BEA IBM ORCL PLUM**	**BEA IBM**
Secure Computing	**X**							**X**				

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Siemens (SIE)	**ENTU GRD RSA SMTR**	**X**	**ENTU RSA**	**X**	**X**	**X**		**ENTU RSA**			**(SAP)**	
Sun Microsystems		**X**			**Thor WV**	**X**		**X**			**X**	**X**
Syntegra (BT Group) (SYNT)						**X**						
Thor Technologies	**(RSA)**	**ORCL Sun**	**(RSA)**	**X**	**X**	**Sun**		**BEA NETE ONET ORCL (RSA) Sun**	**ORCL**		**BEA ORCL**	**BEA ORCL**
TruLogica				**X**	**X**			**BEA NETE RSA Sun**				**BEA Sun**
Vanguard Integrity Professionals				**X**	**X**		**X**					
VASCO	**X**											
VeriSign	**X**											
Vocent Solutions				**X-voice only**	**BMC CRN MTech**							
Volcker Informatik	**MSFT**	**MSFT NOVL**		**MSFT**	**X**	**IBM MSFT NOVL ORCL**	**MSFT Suse**	**X**	**MSFT ORCL**	**X**		**MSFT**

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Waveset (WV)	**ENTU**			**X**	**X**	**X**		**BEA ENTU ONET RSA Sun**			**BEA ORCL Sun**	**BEA Sun**
Wipro Technologies (WPRO)								**X**				

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Vendor Key					
bTRST	beTRUSTed	**PLUM**	Plumtree	**SUSE**	SUSE LINUX
CAL	Calendra	**SFLNK**	SAFLINK	**TIBCO**	TIBCO Software
Fisch	Fischer Int'l Systems	**SLB**	Schlumberger	**VIGN**	Vignette
GRD	Guardeonic Solutions	**SMTR**	SmartTrust		

Source: Gartner Research (November 2003)

Matrix Exclusions

This matrix does not define "who has what" functionality. This doesn't mean that the functionality isn't provided in a vendor product. Because buying behavior is on a product-by-product basis, it is important to know which vendors have separate products so that you are not buying more functionality than you need. For example, password management is a common function that is provided by EAM and user-provisioning products. However, if you don't want the other functionalities found in those products, you shouldn't have to pay for them.

This matrix also doesn't include the identity administration component. Identity administration is a set of functionalities available for user access management purposes across all products, and specifically for user-provisioning and EAM products (see "Identity and Access Management Defined"). Gartner believed that this functionality would evolve into its own market, given the success of Oblix's CoreID — it hasn't. Many user-provisioning and EAM vendors provide identity administration functionality only to manage their product suite offerings. Therefore, identity administration isn't a market. When there is a generic product offering in this area, we will consider defining it as such. Until then, consider only those product suite vendors that provide identity administration functionality across their IAM component offerings.

Choosing a Vendor

The key components for an IAM product suite vendor are EAM and user provisioning. Other components fill out the offering, but they don't perform the bulk of the workload. Therefore, consider only EAM vendors that have a user-provisioning product or strong partnership with a user-provisioning vendor, and vice versa.

Many large IT vendors offer most of the IAM components, such as Computer Associates International, IBM, Novell and Siemens. Others are entering the market with a multivendor product suite, such as Microsoft, Oracle and Sun Microsystems. Information security vendors, such as Entrust, Netegrity, RSA Security and Waveset, also are bringing product suites to market.

There is little benefit in choosing an application platform vendor that supplies IAM components, unless you use only that vendor's application platform suite for application development. In that case, look for extremely good pricing packages.

To provide IAM capabilities across the heterogeneous platform environment, consider the full range of IAM product suite vendors in your initial review.

Key Issues

How will enterprises manage the complexity of authentication and access control in a highly distributed world?

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Acronym Key

DBMS	database management system
EAM	extranet access management
IAM	identity and access management
OEM	original equipment manufacturer
OS	operating system
SSO	single sign-on

This research is part of a set of related research pieces. See "The Growing Need for Identity and Access Management" for an overview.

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