Keynote: Gartner Magic Quadrants and MarketScopes

Ant Allan
Felix Gaehtgens
Gregg Kreizman
Earl Perkins
Brian Iverson
Forces Shaping the IGA, Authentication, and WAM Markets

- Shifting and blurring market lines
- Services orientation
- Adaptive access
- Analytics

And of course: Cloud, mobile, social
User Authentication

Ant Allan
The User Authentication Market

Scorpion Software
- One or many kinds of authentication methods
- "Me too"

SafeNet
- Multiple kinds of authentication methods
- Extensible architecture (usually)

Commodity

Tight Focus
- One or two kinds of authentication methods
- Focus on quality of service

Wide Focus

Specialist
- Single authentication method
- Proprietary IP

Exemplar → Avimir

Authentify
The Shape of the User Authentication Market 2013

- Wide-focus vendors
- Tight-focus vendors
- Commodity vendors
- Specialist vendors

Customers vs. Number

2012

Magic Quadrant
Key Trends in User Authentication

Trends:

- Adoption of cloud-delivered services continues to grow.
- More vendors are adding support for cloud-based targets — but enterprises are likely to exploit discrete federation tools.
- Phone-as-a-token authentication methods dominate — push modes for OOB authentication emerging.
- Contextual authentication growing toward the mainstream.
- MQ vendors move to offer biometric authentication as a primary authentication method — RSA acquisition of PassBan a significant step.

Implications:

- Cloud-delivered user authentication is a viable enterprise choice.
- Enterprise IAM leaders have greater freedom to optimize selection of new user authentication methods.
- Mobile-apt authentication methods emerge — but integration into SSO regimes remains a challenge.
Identity Governance
and Administration

Felix Gaehtgens
Brian Iverson
Leverage the Evolution of Identity Administration and Governance

IT Centric
- System
- Network
- Application
- Data

Business Centric
- Identity Administration
- Identity Governance
- Privileged Account Mgmt.
- Directories

Coarse

"Granularity"

Fine
Key Trends in Identity Governance and Administration

**Trends:**

- Cloud options expand, pricing revolution.
- Mobility requirements grow, MDM integration.
- Big data, analytics, and the identity data and log model.
- The socialization of identity expands.
- Natural convergence of IAM functions occurs.
- Redefinition of "identity management" in lieu of the Internet of Things.

**Implications:**

- A pricing and delivery revolution expands IAM adoption.
- Identity analytics and intelligence programs become formal.
- Provisioning and access governance products converge.
- IAM process and organization mature, matching technology convergence and best practices.
Functions Merge: Provisioning and Access Governance

Identity & Access Governance (IAG)

Identity Analytics & Intelligence (IAI)

Data Access Governance

Identity Governance & Administration (IGA)

Data & Application Authorization

User Administration & Provisioning (UAP)
Provisioning Systems Were Designed for This Guy
But What About Everyone Else?

Compliance pushed IAM needs to the business and IAG became the "pretty" front end to the provisioning system.
Magic Quadrant for User Administration and Provisioning

From "Magic Quadrant for User Administration and Provisioning," 27 December 2012, G00246546
Magic Quadrant for Identity and Access Governance

From "Magic Quadrant for Identity and Access Governance," 17 December 2012, G00235195
Access — Web Access Management, Federation, and Enterprise Single Sign-On

Gregg Kreizman
Emerging Trends in Access

Trends:

- Interest in ESSO continues to wane. Healthcare is the only bastion.
- The WAM market has seen a small rejuvenation led by requirements to support cloud and mobile endpoints with adaptive access.
- Federated access to and from SaaS is now the most frequently stated need.
- Externalizing fine-grained authorization from applications remains a challenge.
- IDaaS market has approached toddler stage. Strength is still in federated access. More players entered the market. More clients interested in IDaaS. Feature sets maturing.

Implications:

- IAM leaders must wait for incumbent vendors to provide mobile and social network support, or use the current gap as rationale for augmenting or changing out current tools.
- The IDaaS market now provides real alternatives to on-premises deployments.
## Web Access Management MarketScoope

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As of 13 November 2013
Recommended Gartner Research

- Magic Quadrant for User Authentication
  Ant Allan (G00231072)

- Magic Quadrant for Identity and Access Governance
  Earl Perkins (G00235195)

- Magic Quadrant for User Administration and Provisioning
  Earl Perkins (G00246546)

- MarketScope for Web Access Management
  Gregg Kreizman (G00247867)