User provisioning delivers capabilities to manage users' identities across systems, applications and resources. Driven by compliance (security effectiveness) and security efficiency, the market is maturing, but identity governance and role-based access concerns raise new issues for customers.

WHAT YOU NEED TO KNOW
This document was revised on 26 August 2008. For more information, see the Corrections page on gartner.com.

User provisioning continues to mature, delivering value for business requirements to make identity-focused security operations more efficient, and to comply with business-driven regulatory and legal reporting and auditing. It is entering a critical phase as the market begins to consolidate and enterprises' expectations rise for enhanced capabilities in meeting business requirements and engaging the business to use business-aware features of user provisioning.

Large-scale, user-provisioning projects remain complex initiatives and require experienced integrators and skilled project management on the part of the enterprise to improve the chances of success. Success rates for major user-provisioning initiatives continue to improve, but significant concerns remain, particularly for earlier customers disillusioned by poor implementations or lowered expectations after deployment. Although some of these concerns are related to project definition, process-to-workflow shortcomings or target-system connector availability, lessons learned about “adjacent” solutions (such as role life cycle management and their potential positive impact) are useful.

When selecting a user-provisioning solution, customers should consider key differentiators that include (but are not limited to):

- Price, including flexibility of pricing for deployment, maintenance and support programs
- Consulting and integrator performance, which remains vital to success
- Worldwide scope, depth, availability and extent of partnerships with consultants and system integrators to deliver the solution
- Delivery time of projects that match the business plan
- Ability to deliver subsidiary services that are not available in the core product through integrated features, custom development, or augmentation via partnerships or adjacent products (for example, role life cycle management, authorization management or federated provisioning)
- Level and extent of experience by vendor and integrator of customer industry segment to deliver successful projects
- Customer experience, including satisfaction with installed provisioning systems (that is, reference accounts)
Organizations must know which issues they are trying to address by deploying this technology. Thoroughly understanding the business issues and selecting the correct technology, project scoping and rigorous project management often prove to be the factors that help companies avoid a “quagmire” situation.

Role life cycle management is a prerequisite for many new user-provisioning initiatives, and should be considered (at a minimum) as a concurrent requirement during the evaluation process. Many enterprises that have already deployed user provisioning are discovering needs for role life cycle management. Ensure that the user-provisioning provider has a role life cycle management partner or comprehensive role life cycle management capabilities in its offerings. This ability will enhance user-provisioning integration to areas such as identity auditing; governance, risk and compliance management (GRCM); and authorization or entitlement management.

Ensure that planning for virtualization in the enterprise includes user provisioning, because it plays a key role for virtual machines (VMs); it provides account provisioning and auditing for partitions, hypervisors and VM monitors; and it enforces segregation of duties (SoD) for that environment.

MAGIC QUADRANT

Market Overview
Identity and access management (IAM) is a set of processes and technologies to manage across multiple systems:

- Users’ identities – Each has an identifier and a set of attributes
- Users’ access – Interactions with information and other assets

User provisioning remains a key identity administration technology. User-provisioning tools also have some, or most, of the following functions:

- Password management
- Role life cycle management
- User access administration
- Resource access administration
- Other credential management
- Identity auditing, including SoD support

User provisioning is part of an overall IAM technology offering. The four major categories of IAM are:

- **Identity intelligence** – Combines security information and event management (SIEM), SoD control and other monitoring tools to perform comprehensive activity, event and incident monitoring and reporting for auditing purposes.
- **Identity administration** – Where user provisioning exists along with role life cycle management and other administrative tools to provide the basic administration capabilities for handling identities and access, which includes resource access administration. It is also focused on providing the necessary service management capabilities to administer and manage identities effectively, from workflow to delegation, and from self-service to connector management.

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• **Identity verification** – Focuses on identity proofing (that is, verifying identities, as well as authentication methods and infrastructure, various single sign-on [SSO] technologies, identity federation and personal identity frameworks).

• **Access management** – Focuses on authorization or entitlements management, and delivers Web access management, operating system access management and content access management, as well as network access control capabilities. Access management is also involved in encryption, digital rights management and data loss prevention.

These categories are based on a foundation of directory and repository technologies that include enterprise directories, virtual directories and metadirectories. Underlying directory services with Microsoft Active Directory to Unix/Linux integration are supported by a number of standards, including Lightweight Directory Access Protocol and X.500.

User-provisioning solutions are the main engine for identity administration activities. Gartner ranks vendors in the Magic Quadrant based on product capability, market performance, customer experience and overall vision to determine which vendors are likely to:

- Dominate sales and influence technology directions during the next one to two years.
- Be visible among clients through several marketing and sales channels.
- Generate the greatest number of information requests and contract reviews.
- Account for the newest and most-updated installations.
- Be the visionaries and standards bearers for the market.

**Key Market Trends**

- Most vendors made progress in user-provisioning execution, showing improvements in features and functionality, marketing and sales execution, and expanding their customer base. Some vendors showed improvements in completeness of vision and customer experience, although less so than in 2007. Concerns remain in large-scale implementations regarding areas such as workflow and connector management, as well as project duration. This year’s Magic Quadrant reflects a higher baseline, so vendors must improve their standing just to stay in the same Magic Quadrant position as in 2007.

- Key changes for vendors in this research: HP has left the user-provisioning product business. BMC Software has re-focused user provisioning as part of its “Business Service Management” (BSM) strategy and offering. M-Tech was acquired by Hitachi and renamed Hitachi ID. Omada A/S is a new vendor in the 2008 Magic Quadrant.

- Although most vendors showed improvements in their Magic Quadrant scores, a few showed substantial progress (such as Oracle, Novell and Quest Software) because of notable improvements in product functionality, market share, partner alliances or combinations thereof.

- Sun Microsystems slipped out of the No. 1 slot in the Leaders Quadrant, dropping to No. 3 because of more-aggressive competitor advances by Oracle and IBM Tivoli, rather than by any fundamental issues with its products or performance. Sun has, and retains, a strong history and presence in the market, and has addressed last year’s concerns in areas such as organizational change impact.

- Oracle assumes the No. 1 position primarily because of momentum from an aggressive marketing and sales program, linkage to other Oracle product lines (that is, licensing) and product improvements. IBM Tivoli retains the No. 2 slot because of its depth of service-based orientation toward delivery, mature product sets and feature innovations, particularly with the latest product release. IBM Tivoli, Oracle and Sun remain close in rating of overall feature-function capabilities, although there are some differences enhanced by good integrators.

- Novell’s position improved in the Leaders Quadrant based primarily on execution against a focused strategy of improving the customer experience, available integration partners, better and more-targeted marketing, and market growth through customer additions and competitor consolidation.

- Courion remains in the Leaders Quadrant through an expanding customer base, partnering and innovation.

- CA entered the Leaders Quadrant based on a more-coherent vision regarding its product sets in IAM and a revamped marketing and sales organization, but getting there cost the company time and momentum, which is reflected in its ability-to-execute scores. CA is better-positioned to compete and attract customers now, although some issues remain in areas such as Active Directory integration – an issue shared by several competitors.

- Voelcker Informatik moved from the Niche Players Quadrant to the Visionaries Quadrant because of significant innovation in its vision and servicing of its clients. Sentillion and Fischer International remain in the Visionaries Quadrant due to similar capabilities. All three of these vendors have a relatively small customer base and limited abilities to deliver through worldwide channels, but they are doing some of the more-advanced work in user provisioning in technology and approach.

- Microsoft has managed to hold its position in the Challengers Quadrant through custom engagements with strategic clients and price, although it remains cognizant of efforts by Quest Software and Omada in Microsoft-centric delivery solutions.

- HP has exited the user-provisioning product business, remaining in consulting and integration. Novell has picked up the licensing for HP’s products and provides a migration program for HP customers, although other competitors are offering similar programs. BMC Software is ceasing direct sales of its user-provisioning solution as a separate offering, choosing instead to offer it as part of the company’s BSM product suite. This affects its ability to execute, which reflects in its Magic Quadrant position.

- M-Tech was acquired by Hitachi and renamed Hitachi ID in 2008. Hitachi is (among other things) intent on expanding sales and marketing opportunities worldwide for the product set, and is starting that process.

- Siemens and Beta Systems continue to execute well, albeit at a lower growth rate than other competitors. Both have experienced organizational restructuring that has affected their user-provisioning offerings since the 2007 Magic Quadrant.
• Omada is a new vendor to the 2008 Magic Quadrant. It is small but rapidly growing in the Microsoft-centric delivery space.

• Most user-provisioning vendors reported healthy revenue increases since the 2007 Magic Quadrant, indicating a continued growth market (see Market Maturity section). Gartner expects user-provisioning revenue opportunities to continue growing through 2009 as the market matures and consolidates, with a peak occurring in 2010 as enterprises deploy new-generation solutions and upgrade existing deployments.

• Compliance continues to be a significant driver for global corporations for user provisioning, although this depends on the relative size of the enterprise, the market segment and geography. Security efficiency for cost containment and service-level targeting remains a strong driver worldwide. Interest in user provisioning continues to increase in Europe, the Middle East and Africa (EMEA), the Asia/Pacific region and Latin America, while remaining constant in North America.

• Significant contributors to the user-provisioning decision process in 2008 include:
  • Role life cycle management, which defines, engineers, maintains and reports on enterprise roles and rules as inputs to the provisioning process
  • GRCM support, driven primarily by enterprise application providers (such as SAP and Oracle) through ERP implementations and the need to support fine-grained authorization as part of the user-provisioning process
  • A desire to deliver an overall IAM governance program that identifies and supports the role of user provisioning in that program, and links it to information security policy and the establishment of controls
  • System integrator and/or consultant selection for project or program implementation
  • Privacy, which provides user control of what is provisioned and ensures that what is provisioned is adequately protected from a technical and regulatory perspective
  • Provisioning for card management tools as part of a security management environment
  • Identity audit and reporting (that is, the ability to report fully and accurately on the effects of user provisioning across the enterprise)
  • Specific industry segment strategies (for example, healthcare user-provisioning differentiation)
  • Specific industry segment size strategies (for example, small and midsize business [SMB] targeting)

• Customers increasingly evaluate user-provisioning solutions as part of a broader IAM suite or portfolio, depending on their specific requirements. This creates additional challenges for user-provisioning vendors that do not offer a portfolio solution. So far, these vendors have offered sufficient innovation and differentiation to compete effectively with portfolio vendors, and have addressed enterprises not aggressively pursued by that are likely to be compromised by acquisition or departure from the market).

• At present, there are five vendors recognized as single providers of portfolios: Oracle, IBM Tivoli, Sun, Novell and CA. All five of these vendors are in the Leaders Quadrant.

• Vendors with major product offerings other than user provisioning use comprehensive licensing with customers and partners as competitive leverage to create opportunities, particularly in displacement strategies. This will have as great an impact on the future of the user-provisioning market as product features or system integrator partnerships.

• Some of the user-provisioning vendors are already selling their solutions to internal service providers, illustrating a design and configuration that would allow a managed or Internet-based service offering for user provisioning. Early indicators show that evaluations, particularly for SMBs, of user provisioning as part of broader software-as-a-service (SaaS) offerings are occurring in major service provider firms, although significant legal and logistical issues must be resolved before offering it as such.

• Although technical improvements in user provisioning continue, project and program complexity for large implementations is proving to be a challenge for customers, resulting in potentially long planning and deployment periods. Two distinct types of user-provisioning vendors exist: those that can address large-scale requirements, and those that can address SMB (1,500 to 25,000 users) requirements. The first group can also address small installations, but choose the large business market as its target. This will change over time as SMB-centric, user-provisioning providers move up the market, and large-scale, user-provisioning providers move down the market.

• User provisioning will play a key role in the virtualization movement. This is especially true of network-based appliances that, at one point, were separately managed machines, and are now consolidated into a single server, thereby potentially introducing SoD issues. Concerns such as the control of who can manage the virtual server host and each of the guest partitions will be critical, as will managing per-VM administrative accounts, protecting access to VM management tools and auditing all VM administrative activity.

• The role of identity intelligence (SIEM) will continue to grow in user-provisioning solutions as security and network events are correlated with identity events to provide a full picture of the network.

Market Growth
User provisioning grew in terms of revenue at a global rate of 16.7%. North America exhibited revenue growth of 13.2%, Western Europe 21.6%, the Asia/Pacific region 16.7% and Latin America 26.4%, which is strong performance across most geographies. North America accounted for 49.4% of 2007 market share, Western Europe 30.4%, the Asia/Pacific region 7.3% and Latin America 3%. 
User provisioning is entering an early maturity cycle, with well-established vendors and well-defined IAM suites. Third-generation releases are now available, with most basic capabilities well-structured and configured. Gartner estimates that, as of mid-2008, approximately 20% to 25% of midsize to large enterprises worldwide, across all industries and sectors, have implemented some form of user provisioning. An additional 20% to 25% are evaluating potential solutions.

Structured and formal methods of planning and implementing user-provisioning solutions in enterprises remain elusive because of the quality of implementation. This is changing. The leading user-provisioning products are effective in 80% of situations presented by customers for the “basic” needs of provisioning, account workflow, identity storage, audit, reporting, and integration with existing platforms and the most-common applications. The problem remains in affecting implementation of properly defined business challenges that user provisioning must address. These include:

- **Using a decision framework for planning IAM that includes identifying, prioritizing and organizing key resources in the implementation process for user provisioning**
- **Selecting an effective program partner (that is, consultant or system integrator) to lead the effort in a reasonable time frame, and one who understands the business issues of user provisioning and the technical implementation concerns required to be successful**
- **Addressing issues related to role life cycle management for effective account user provisioning**
- **Addressing critical issues in post-implementation customer environments related to fixes, integration or expansion**

As a result of the estimated 20% of situations where user-provisioning implementations are less than effective, the user-provisioning Hype Cycle for 2008 shows a slight decrease in maturity on the curve. This is meant to reflect the lack of progress made in:

### Market Maturity

User provisioning has moved beyond just an IT project implementation issue to a business program concern, one that has broader implications across the enterprise or institution and requires cross-organization communication. Failure to address this is a primary inhibitor to established user-provisioning projects, and is the most-common cause of failure. Vendors that recognize this need and are able to effectively address it have been leaders in user provisioning and remain so. This remains a key decision criterion, with equal weighting for market share and revenue.

Role life cycle management addresses another user-provisioning concern. A comprehensive process for managing roles within an enterprise, it is considered an important element in user provisioning. Role life cycle management addresses user provisioning in four areas:

- **Definition**: The development of an initial role framework enables an enterprise to begin the definition phase of roles. The information required to construct the framework will exist in several areas throughout the enterprise as line-of-business and functional role definitions.

- **Building**: This includes the role mining, role discovery, entitlements discovery and role creation phases, which may require a tool or set of tools to enable an enterprise to build. Enterprises take the role and privileges framework already defined and, using a tool, perform correlation analyses that may deliver a recommended role set (sometimes called candidate roles) based on actual target entitlement assignments. These candidate roles may be vetted with business owners to create a set of roles that will subsequently be automated through user provisioning or through the role management tools.

- **Maintenance**: In this phase, fine-tuning is done for the constructed roles, as well as ongoing changes through systems or controls. Regular review and approval are required during this phase for those changes. This step can be successfully executed most often if the enterprise is using automation; otherwise, the enterprise usually reverts back to a manual process that won’t be used.

- **Compliance**: The final life cycle phase involves verification, attestation (management’s review and certification) and risk management steps for roles, supporting the growing proliferation of regulations and audits in that reports can be reviewed by management and auditors to ensure that the least privileges and SoDs are implemented.

Previous user-provisioning projects did not adequately account for role life cycle management. As such, new vendors in the IAM market have been introduced to supplement the user-provisioning process to ensure that this customer requirement is addressed. Some user-provisioning vendors have role life cycle management functionality as part of their portfolio. The use of such tools is projected to reduce the manual workload related to role discovery and mapping by up to 40% to 55%.
A third area of growing maturity is user-provisioning auditing and reporting. As compliance and regulatory needs grow more specific and are better defined, identity audit reporting continues to evolve (as separate products and as functionality included with user-provisioning products) to address the specific needs of the world user-provisioning community. This remains an ongoing process.

**Characteristics of a Leading Vendor**

Although the user-provisioning market is maturing and vendors from any of the quadrants could potentially address your needs as a customer, particular characteristics of a good candidate vendor exist in every occasion:

- **Good partners:** Good user-provisioning vendors have good implementation partners, those with proven histories of performance, and the ability to understand and address customer industry requirements that are affected by business segment differences, region and size. Some vendors have direct integration experience, and industry expertise is a requirement.
- **The ability to define deliverables, phases of the project, metrics and an “end state”:** When embarking on an initiative as potentially complex as user provisioning, it is critical that the program be defined with metrics that can be measured, and with projects that have an end. Many earlier user-provisioning experiences have lasted years because of the inability to know when the end has been reached (or even what the goal of “Phase 1” is). There must be an end to a business-critical implementation project (such as IAM), or at least those phases of technology and process implementation, to enable the ongoing program to continue.
- **Coupling and uncoupling the suite:** A world-class, user-provisioning vendor should be able to sell you only user provisioning and the associated user-provisioning services (for example, identity audit and reporting, or workflow) without requiring you to buy the entire IAM system that they sell. Integration is a good thing, but not when it is so tightly integrated that uncoupling it later on to purchase a complementary tool is impossible. This represents aggressive competition with pure-play, user-provisioning providers.
- **Solution selling vs. making it fit:** A leading vendor will provide user provisioning as part of a packaged solution tailored to your stated requirements, rather than forcing your requirements to fit the product. The corollary of this is that you must have a clear and comprehensive requirements definition before any formal evaluation of specific tools. Although there must always be some practical compromise, mature best-in-class solutions can look more like your business requirements, rather than a vendor’s technical specifications.
- **Modularity:** Mature user-provisioning products show an awareness of enterprise architectures and the role of the product within them. These products also have quicker turnaround in feature and version release, because the product design allows smoother updates and follows a secure system development methodology. Mature product vendors in user provisioning show an awareness of the requirements for service-centric infrastructures, and move to accommodate them with service-centric solutions where possible.
- **The post-implementation experience:** User provisioning is a well-established market. As such, user-provisioning products should reflect those signs of maturity. If customers are unhappy and seek replacement solutions, there are serious issues with planning and requirements. The post-

implementation experience, as a new customer and as an upgrade customer, will say a lot about world-class, user-provisioning vendors in this market.

This is not an exhaustive list, merely a representative one. It is relatively independent of vendor size or industry range in the user-provisioning market, and can provide an opportunity for even the smallest vendor to excel in a comparative view of customer experience.

**User Provisioning as Part of a Suite/Portfolio vs. Pure-Play Product**

Situations where customers might choose a user-provisioning suite vendor over a point vendor include:

- Customers constrained by the number of vendors whom they can choose, particularly for a multitool IAM solution – of which user provisioning is one
- An application or infrastructure requirement that specifies the product suite as optimal for integration with that application or infrastructure
- A licensing or cost advantage achieved by owning products or using services from the suite or portfolio vendor
- An agreement with a provider of outsourced services to a client where a consolidated contract with a preferred vendor is more acceptable

Situations where customers might choose a pure-play, user-provisioning vendor over a suite or portfolio vendor include:

- Policy-driven or IT concerns regarding vendor lock-in (that is, a “monoculture” for IAM solutions)
- Customers already have solutions for access management or component identity management solutions from a vendor whose user-provisioning solution does not meet their requirements
- Cost, time of implementation or industry-specific options

Although it’s possible, for example, to choose a user-provisioning product from one suite/portfolio vendor even if you have an access management product from another vendor (pure play or suite/portfolio), this practice is occurring less often for a number of reasons:

- Aggressive licensing often makes the provisioning solution from the same vendor as access management more desirable from a cost perspective.
- Shared maintenance from the same suite vendor is often less expensive, and easier to manage and receive.
- The growing maturity of the IAM market is equalizing many of the basic function and feature sets of the individual point solutions. It is also lessening differentiation and negating some of the best-of-breed arguments that are technically based.

However, marketing adjacent products does not constitute integration. It must be demonstrated with real and legitimate levels of cooperation and mutual support between portfolio components.

Ironically, recent events in acquiring role life cycle management solutions run against the suite/portfolio practice. Because role life cycle management is in an earlier maturity phase than user
provisioning, it is not uncommon to have a role solution from a pure-play provider or even one from a suite/portfolio provider. This will change as suite/portfolio vendors gradually incorporate role life cycle management capabilities, whether by design or by acquisition. Earlier editions of access management remain well-entrenched as well, and make it difficult to provide a suite/portfolio solution if that vendor cannot provide for the user-provisioning requirements of that customer.

For 2007, the average ratio of consulting/integration to product licensing costs was approximately 3 to 1. For some vendors and implementations, it was as high as 5 to 1, but in others, particularly pure-play vendors (where the scope of effort may be smaller if user-provisioning alone is addressed), the ratio approached 2 to 1 or even 1 to 1. The goal for vendors (and integrators) is to have as low a ratio as possible. As the market continues to mature and more-preconfigured packages are available, this is possible even for larger portfolio vendors.

**Market Definition/Description**

User-provisioning solutions address an enterprise’s need to create, modify, disable and delete identity objects across heterogeneous IT system infrastructure, including operating systems, databases, directories, business applications and security systems. Those objects include:

- User accounts associated with each user
- Authentication credentials – typically for information system access, and then most often just passwords, but sometimes for physical access control
- Roles – business level, provisioning level, line-of-business level
- Entitlements (for example, assigned via roles, groups or explicitly to the user ID at the target system level)
- Managing group membership or role assignments from which entitlements may flow
- Managing explicit entitlements
- User profile attributes (for example, name, address, phone number, title and department)
- Access policy/rule sets (for example, time-of-day restrictions, password management policies, how business relationships define users’ access resources and SoD)

Key activities that are required for a successful identity management process include ensuring that a complete audit trail of administration activities for these objects exists, and reporting on these activities for compliance purposes – regulatory, internal and business relationship.

Gartner distinguishes user provisioning from identity management in that user-provisioning products are a subset of identity management products. All user-provisioning products offer the following capabilities for heterogeneous IT infrastructures:

- Automated adds/changes/deletes of user IDs at the target system
- Password management functionality (for example, simplified help desk password reset, self-service password reset and password synchronization, including bidirectional synchronization [sold as a separate product by some user-provisioning vendors because they had their start there])

- Delegated administration of the user-provisioning system
- Self-service request initiation
- Role-based provisioning through capabilities provided by role life cycle management features or partners
- Workflow – provisioning and approval
- HR application support for workforce change triggers to the user-provisioning product
- Reporting of the roles assigned to each user and the entitlements that each user has
- Event logging for administrative activities

A comprehensive user-provisioning solution has the following additional capabilities:

- **SoD**: Enterprises need to automate and manage application-level business policies and rules to identify SoD violations. They also need to quickly remove those violations from the application environment and ensure that new SoD violations are not introduced in the course of the ongoing management and identity administration of the application. Today, SoD tools exist primarily for ERP applications – ERP-specific, transaction-level knowledge is required to successfully enforce SoD in these environments. However, a generic SoD framework is required to address all SoD application needs in the enterprise. Typically, a role is used as the container to segregate conflicting business policies in the application environment. Many user-provisioning vendors deliver capabilities for this heterogeneous framework. It does not alleviate the need for an SoD for an ERP product because these tools have extensive integration with ERP applications. User-provisioning vendors will continue to partner with ERP vendors to deliver complete SoD solutions.

- **Role life cycle management**: Regulatory compliance initiatives are directing IAM efforts back to the role development drawing board. The role becomes a very important control point that enterprises need to manage in a life cycle manner – just as they do an identity. Enterprises need the ability to automate processes to:
  - Define existing roles through role-mining automation.
  - Manage formal and informal business-level roles for any view of the enterprise (for example, location, department, country, functional responsibility and so on), and feed user-provisioning products to ensure that the link is made between the business role and associated IT roles.
  - Establish a process by which new roles being developed in the enterprise follow the same management process used for existing roles, and tie those new roles to the automated role life cycle management solution.
  - Deliver a generic framework to address all role life cycle management needs. Most user-provisioning vendors are partnering with role life cycle management vendors, acquiring them or building that expertise with the user-provisioning solution.
  - Manage the role through its entire life cycle – role owner, role changes, role review, role assignment, role retirement – and role-based reporting options.
evaluate vendors, marketing and sales effectiveness, in terms of market understanding, strategy, communications and execution. We will evaluate a vendor’s organization for such services, its ability to change to reflect customer demands and its overall success as measured by customers.

Inclusion and Exclusion Criteria

Inclusion Criteria
User-provisioning vendors are considered for the 2008 Magic Quadrant under the following conditions:

- Support for minimum, core user-provisioning capabilities across a heterogeneous IT infrastructure
- Automated adds/changes/deletes of user IDs at the target system
- Password management functionality
- Delegated administration
- Self-service request initiation
- Role-based provisioning supported by role life cycle management
- Workflow provisioning and approval
- HR application support for workforce change triggers to the user-provisioning product
- Reporting the roles assigned to each user and the entitlements that each user has
- An event log for administrative activities
- Products must be deployed in customer production environments, and customer references must be available
- Gartner considers that aspects of the companies’ products, execution or vision are noteworthy.

Exclusion Criteria
User-provisioning vendors that are not included in this Magic Quadrant may have been excluded for one or more of the following reasons:

- Was invited to participate but did not reply to our request for information
- Did not meet the inclusion criteria
- Supplied user-provisioning capabilities for only one specific target system (for example, Windows, iSeries and so on)
- Had minimal or negligible apparent market share among Gartner clients, or no shipping products
- Were not the original manufacturer of a user-provisioning product – this includes value-added resellers (VARs) that repackage user-provisioning products that would qualify from their original manufacturers; other software vendors that sell IAM-related products but don’t have a user-provisioning product of their own; and external service providers that provide managed services (for example, data center operations outsourcing).

No user-provisioning vendor provides all the identity management capabilities noted above. For most enterprises, additional products are required to do a complete IAM job. SIEM tools can be used for "who did what" reporting at the event level, with granularity by time of day, geography, network port and other details.

This update to the user-provisioning Magic Quadrant includes an additional focus on ease of deployment, ongoing operations, and maintenance and vendor management. It also puts additional emphasis on marketing vision and execution and evaluates sales and advertising execution as part of the overall experience:

- How do the user-provisioning vendors deliver core user-provisioning capabilities as an enterprise management system in support of an ongoing, changing business environment? Similar
Evaluation Criteria Definitions

**Ability to Execute**

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

**Overall Viability (Business Unit, Financial, Strategy, Organization):** Viability includes an assessment of the overall organization’s financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization’s portfolio of

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

**Market Responsiveness and Track 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 in order 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, 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, etc.

**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 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 Web site, advertising, customer programs and positioning statements.

**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 product development and delivery that emphasizes differentiation, functionality, methodology and feature set 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 verticals.

**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.