

# The Forrester Wave™: Identity Management And Governance, Q4 2021

## The Nine Providers That Matter Most And How They Stack Up

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### Summary

In our 21-criterion evaluation of identity management and governance (IMG) providers, we identified the nine most significant ones — Hitachi ID, IBM, Micro Focus, Omada, One Identity, Oracle, RSA, SailPoint, and Saviynt — and researched, analyzed, and scored them. This report shows how each provider measures up and helps security and risk professionals select the right one for their needs.

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# Digital Transformations Demand IMG To Enforce Identity Policy Controls

Identity management and governance solutions have existed for several decades and still coalesce around user provisioning, access/request approval, access recertification, role management, and segregation of duties (SoD). However, IMG vendors continue to innovate, spurred on by seismic shifts in computing environments and by customers in the throes of digital transformation efforts. As a result, most leading vendors now offer viable SaaS delivery options, along with burgeoning cloud/SaaS governance solutions. IMG customers and prospects also struggle with the rising complexities of agile business practices, extended enterprise structures, evolving compliance requirements, and a growing diversity of target applications and entitlements across a variety of human user accounts and [nonhuman identities](#). In response, IMG vendors have invested in innovative approaches for automation and streamlining multistep workflows, as well as improving the speed and effectiveness of decision-making using analytics engines and machine learning.

As a result of these trends, IMG customers should look for providers that:

- **Deliver automation and adaptable workflows for managing complexity at scale.** The use of automation and self-service for complex access requests/approvals, access recertifications (attestations), and SoD enforcement improves productivity, reduces overhead, and speeds tasks to completion. This is especially salient, with many cooks in the kitchen (IT admins, application owners, approvers, requesters, auditors, etc.), and with a variety of human (employees, partners, contingent workers, etc.) and nonhuman accounts (RPA/bots, IoT, etc.) to manage across highly distributed hybrid environments and workspaces.
- **Offer well-architected, feature-rich IMG via SaaS delivery for hybrid environments.** Massive digital transformation efforts, accelerated by the pandemic, means that enterprise IMG RFPs increasingly prioritize IMG SaaS delivery options that can address hybrid environments, maintain feature parity, and be deployed globally (with regional segmentations for data sovereignty). Furthermore, cloud platforms (AWS, Azure, and GCP) require governance from IMG or from [cloud identity governance \(CIG\)](#) solutions. SaaS applications, especially file sharing apps and big data platforms, also present new IMG challenges.
- **Provide analytics and recommendation engines across the platform.** Effective and accurate analytics can optimize an organization's IMG practice by providing context, correlations based on pattern analysis, and insights for improved

decision-making and process optimization. Analytics and machine learning algorithms can be applied to great effect across many IMG functions, including access/request approval, risk management, role management, attestations, SoD, and more.

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on [identity management and governance](#).

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

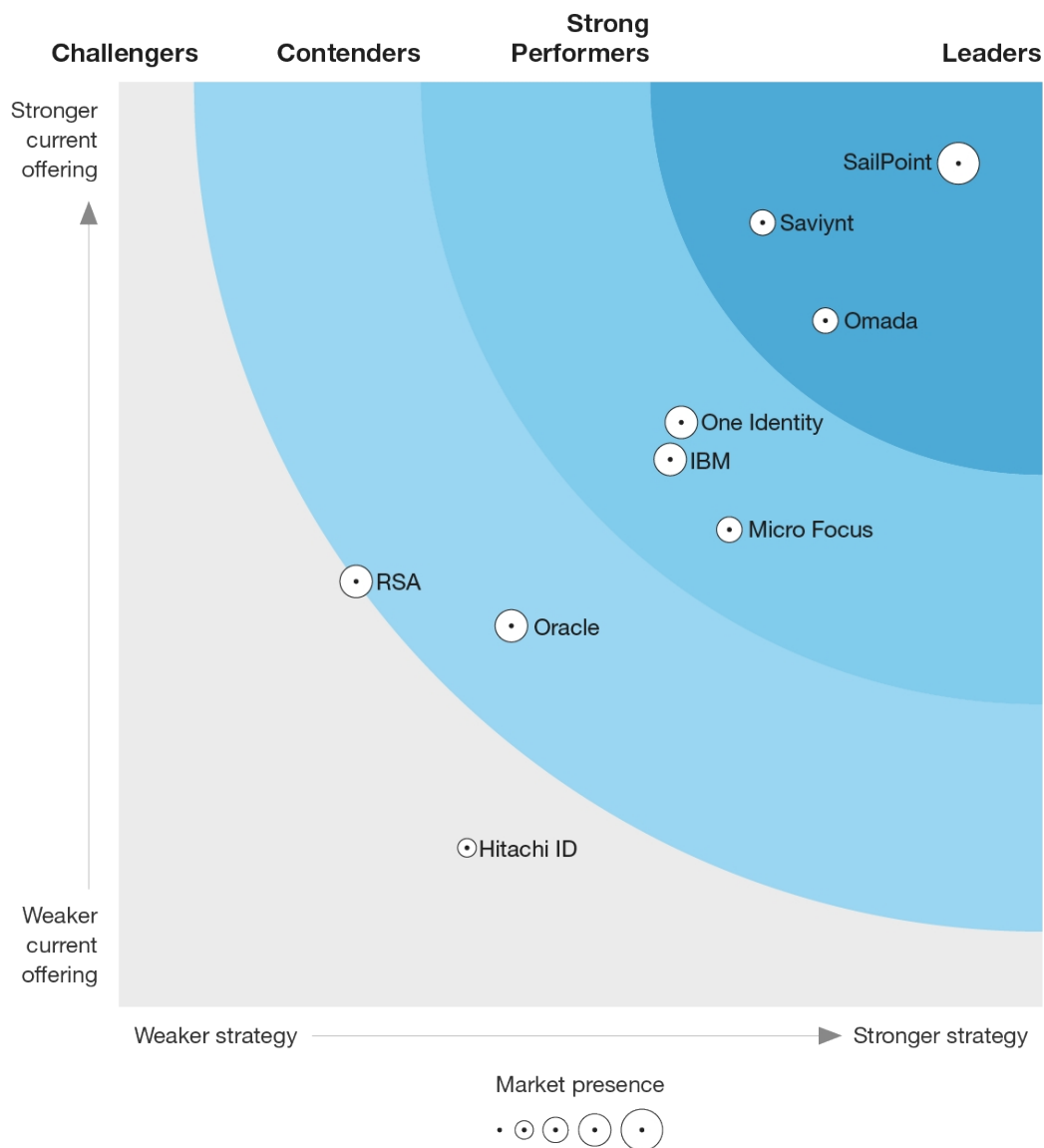
Figure 1

Forrester Wave™: Identity Management And Governance, Q4 2021

## THE FORRESTER WAVE™

### Identity Management And Governance

Q4 2021



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**Figure 2**

Forrester Wave™: Identity Management And Governance Scorecard, Q4 2021

	Forrester's weighting	Hitachi ID	IBM	Micro Focus	Omada	One Identity	Oracle	RSA	SailPoint	Saviynt
<b>Current offering</b>	50%	0.86	2.96	2.58	3.71	3.16	2.06	2.30	4.56	4.24
Lifecycle management	15%	1.00	3.00	3.00	4.20	3.00	3.80	3.00	5.00	5.00
Role management	12%	1.00	3.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00
Compliance management	18%	1.00	2.80	2.20	3.80	2.20	2.00	3.00	4.20	3.80
Risk management	15%	1.00	5.00	3.00	3.00	5.00	1.00	1.00	3.00	3.00
Cloud and SaaS governance	14%	0.00	3.00	1.00	1.00	3.00	1.00	1.00	5.00	5.00
Application integrations and automations	11%	1.00	3.00	3.00	4.10	3.00	3.00	1.90	5.00	5.00
Reporting and dashboards	15%	1.00	1.00	3.00	5.00	3.00	1.00	3.00	5.00	5.00
<b>Strategy</b>	50%	1.88	2.98	3.30	3.82	3.04	2.12	1.28	4.54	3.48
Product vision	14%	1.00	3.00	3.00	3.00	5.00	3.00	3.00	5.00	3.00
Execution roadmap	15%	1.00	3.00	5.00	5.00	3.00	3.00	1.00	5.00	3.00
Market approach	12%	3.00	3.00	3.00	1.00	3.00	3.00	1.00	5.00	5.00
Innovation roadmap	21%	3.00	3.00	3.00	3.00	3.00	1.00	1.00	5.00	3.00
Supporting products and services	15%	1.00	3.00	3.00	5.00	3.00	3.00	1.00	5.00	3.00
Delivery model	12%	1.00	1.00	3.00	5.00	1.00	1.00	1.00	3.00	5.00
Commercial model	11%	3.00	5.00	3.00	5.00	3.00	1.00	1.00	3.00	3.00
<b>Market presence</b>	0%	1.40	3.95	2.85	2.45	3.25	3.70	3.05	5.00	2.65
Revenue	60%	1.00	4.00	3.00	2.00	3.00	4.00	3.00	5.00	2.00
Average deal size	15%	2.00	2.00	2.00	5.00	3.00	2.00	5.00	5.00	3.00
Number of employees/engineers	25%	2.00	5.00	3.00	2.00	4.00	4.00	2.00	5.00	4.00

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

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## Vendor Offerings

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Forrester included nine vendors in this assessment: Hitachi ID, IBM, Micro Focus, Omada, One Identity, Oracle, RSA, SailPoint, and Saviynt (see Figure 3).

Figure 3

Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Hitachi ID	Bravura Identity	12.1.2
IBM	IBM Security Verify Governance	v10
Micro Focus	Identity Governance; Identity Manager	3.6.x; 4.8.x
Omada	Omada Identity Cloud & Omada Identity	14
One Identity	Identity Manager	8.1.4
Oracle	Oracle Identity Governance (OIG)	12.2.1.4.0
RSA	SecurID Governance and Lifecycle Cloud	7.5.0
SailPoint	SailPoint Identity Platform	N/A
Saviynt	Saviynt EIGA	Saviynt 2020

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## Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

### Leaders

- **SailPoint leads with a comprehensive feature set, user-centric architecture, and AI/ML.** SailPoint is the largest IMG pure play by annual revenue. SailPoint’s coherent product-focused vision aligns to its execution strategy and innovation roadmap. The product vision is user-centric, with the goal of simplified and intuitive experiences that also maintain depth and breadth of visibility for effective decision-making. Reference customers expressed very high satisfaction with supporting products and services. SailPoint is making a lot of progress building out a comprehensive set of features for the SaaS offering, which until recently was not meeting the needs of on-prem customers seeking a move to SaaS. The product roadmap imperatives focus on customer experience, SaaS readiness, rapid time-to-value, AI/ML for optimization, and security. The SailPoint Identity Platform offers best-in-class embedded AI/ML for a variety of use cases such as access requests,

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access certification, and role mining. The platform is especially strong for user lifecycle management, compliance management, and integrations with both target applications and supporting systems. However, SoD enforcement and risk management are just on par with others in this evaluation. SailPoint is best for large, distributed organizations with sophisticated needs and hybrid environments that want to leverage automation and AI/ML for scale and flexibility.

- **Saviynt is known for SaaS delivery, fast deployment, and low initial investment.** Saviynt is a fast-growing IMG disruptor that entered the market with a single-tenant SaaS offering. Saviynt's value proposition is rapid delivery, with customers going live within eight weeks, on average. Reference customers were satisfied with the SaaS delivery advantages, including the consumption-based pricing. However, some customers have raised concerns about growing pains resulting in the vendor becoming unresponsive after product deployment. Furthermore, the product vision is complete, but consists of a collection of more opportunistic and tactical product expansions, compared to others in this evaluation with more coherent longer-term strategies. Saviynt's roadmap plans include Zero Trust access and policy governance, machine identity and bot governance, decentralized identity, DevSecOps support, and more. Saviynt's Enterprise Identity Cloud offers strong user provisioning, access request and approval workflows, along with integrations to target applications and supporting systems. The SoD enforcement is exceptional, with clear view of apps, cross-app, reason for violation, and impact of remediation. However, role management and risk management capabilities, while feature rich, lack coherence and have poor user navigation. Data access governance has lots of details but little context for effective decision-making. Reference customers want to see improved identity management reporting and better user-focused role management workflows. Saviynt is best for organizations that want to get up and running quickly with a single-tenant SaaS offering.

- **Omada offers a well-designed solution and is pushing to expand its global footprint.** Omada is a long-standing European IMG pure play. Most business is in Europe, with an established presence in the North American market as well. Strategically, the vendor is intent on reducing complexity, which is often inherent in identity management programs, and on reducing cost and time-to-value for customers via SaaS delivery and a 12-week accelerator package. Omada has implemented a targeted execution plan over the past 18 months, which has improved revenue growth and raised [Net Promoter Scores<sup>SM</sup>](#). However, its market approach lacks the investment levels, reach, and sophistication of leading competitors. Omada plans to accelerate investment in cloud IMG, then move to a



converged and deeply integrated identity platform over time while using AI/ML to address approval fatigue. The Omada Identity platform excels in role management and has very strong access request and approval and access certification capabilities. Dashboards and reporting are highly configurable, with more than 100 out-of-the-box reports and the ability to drill down for detail and take action directly from the dashboards. Reference customers cited user provisioning, access request and approval, and role management as top features. However, data access governance depends largely on Omada's partners, and the vendor's cloud and SaaS governance capabilities are limited. Omada is best for organizations that want well-organized IMG processes aligned to a role-based access control (RBAC) approach.

## Strong Performers

- **One Identity aims for unified identity-centric cybersecurity.** One Identity, a Quest Software business (founded in 2004 and spun out from Dell in 2016), is an IAM portfolio business that came from Quest's 2010 acquisition of Voelker. One Identity has a sizable global footprint, with many IMG customers in Europe. The vendor's vision for a unified, identity-centric approach to cybersecurity is well articulated and sets a clear path forward. However, the vendor has chosen a lift-and-shift approach to fast-track its SaaS delivery. One Identity customers have expressed disappointment with the vendor's IMG SaaS offering. The near-term roadmap will focus on analytics to develop against the vision of dynamic IMG to reduce dwell time, provide security awareness, remove unused access, and identify zero-day vulnerabilities. One Identity's Identity Manager has decent user provisioning, role management, and access certification. The risk model is rich, with over 200 built-in functions that assess risk by employee and department, with heatmap views that are drillable for more details. SoD enforcement is very configurable but challenging to set up and manage. One Identity is best for organizations that want to build their IMG program around a risk model and have confidence in the vendor's vision and execution plan for unified, identity-centric cybersecurity.
- **IBM is investing for growth across the Verify portfolio, including identity governance.** The IBM Verify Governance product is part of the IBM Verify IAM portfolio and continues to be an area of renewed focus and investment within the IBM security business. IBM's vision for the overall Verify portfolio is to align to Zero Trust principles and a risk-based approach. IBM's commercial model for the Verify portfolio is innovative, with streamlined pricing that considers modular- and usage-based consumption through one metric. However, IBM is behind in delivering Verify Governance as a robust, standalone multitenant SaaS offering. IBM's

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roadmap plans are to support container platforms, renovate the user interface, further support governing bots/IoT devices, enhance ServiceNow layered service desk integration, and enhance cloud IGA capabilities from IDaaS platform, hosted IGA, and third-party vendor integrations. IBM Security Verify Governance has solid user provisioning, access certification, and SoD enforcement capabilities. It exhibits best-in-class risk management capabilities aimed at achieving least privilege access. Reference customers reported high satisfaction with risk management capabilities. However, dashboards and reporting are lackluster. Reference customers noted that logging and diagnostics were lacking. Role management is difficult to configure and administer, and reference customers cited RBAC as needing improvement. Data access governance is offered via IBM's Guardium or through partner integration with StealthBits. IBM's Verify Governance is best for customers that want to build IMG around a strong risk management model.

- **Micro Focus has made great strides in IAM investment with revamped IMG.** Micro Focus is a long-standing IT operations management and security provider. Following an early 2020 board of directors' decision, Micro Focus ramped up investment to revitalize the security business, now named CyberRes, which includes the NetIQ IAM business. The vendor has exhibited a strong execution roadmap over the past year, with a revitalization of its identity governance offering. However, more is needed to catch up to the Leaders in market awareness and SaaS delivery. Micro Focus plans to differentiate with a fully automated risk analysis and remediation engine that leverages the Vertica (massively parallel processing big data) and Intersect (unsupervised machine learning) products. The Micro Focus NetIQ Identity Manager and Identity Governance offerings have a very good risk management framework. Role management is well-structured. The product has good dashboards and reporting with more than 150 out-of-the-box reports and ability to customize, but reference customers cited challenges with the user interface and product performance. The cloud/SaaS governance capabilities are very basic. The SoD capabilities don't perform as well for more complex many-to-many configurations. Micro Focus is best for organizations that value risk management and may consider a move to the full Micro Focus platform for product synergies and pricing discounts.

## Contenders

- **Oracle excels at identity management for complex ERP systems and databases.** Oracle has IAM as a core component of its security business strategy. Oracle has a practical vision and market approach to provide modern, SaaS-delivered IMG to address multicloud and hybrid customer environments. Oracle

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has been slow to deliver on its execution and product innovation roadmaps but has more recently corrected this execution problem and is investing to catch up. Oracle's roadmap plans center on delivery of a new SaaS offering to support multicloud and hybrid deployments. Oracle is also focused on improving usability and product capabilities through a microservices architecture and flexible deployment options. Oracle Identity Governance (OIG) offers solid user provisioning that performs well at scale, and decent SoD enforcement, along with many customization capabilities. Reference customers noted high satisfaction with each of these capabilities. Reporting and dashboards are static and depend on the Oracle BI Publisher product for any substantive dashboard views, but reports are customizable for additional views. Risk management and cloud/SaaS governance capabilities are lacking today, but Oracle is developing these capabilities. Reference customers cited reporting/dashboards and access certification as challenging, and cloud governance as a most requested priority roadmap item. OIG is best for organizations with a need for solid user provisioning and SoD enforcement that still have many workloads on premises, especially for complex ERP systems and databases.

## Challengers

- **RSA is in early stages of an IMG reboot following 2020 spin-off from Dell.** RSA entered the IMG market with the 2013 acquisition of Aveksa. In September 2020, Dell spun off RSA to a consortium led by Symphony Technology Group. RSA has a decent IMG vision that focuses on three core principles: 1) continuous risk-based access assurance to mitigate digital access risks; 2) business user experience to reduce friction and frustration; and 3) customer success for quick and efficient implementation and operation. However, with the recent the spin-off, RSA is still in a rebuilding phase with unproven execution strategy and market approach after years of lagging investment in the IMG portfolio. Reference customers cited low satisfaction with supporting products and services and with the commercial model. RSA plans to drive roadmap through innovation days, customer-facing sessions and discussions, and workshop sessions and product advisory group meetings. RSA's SecurID Governance and Lifecycle product provides reliable lifecycle management and compliance management. The offering has robust role management capabilities and access certification, with reference customers citing attestations as a top feature. Risk management is behind, and cloud/SaaS capabilities are limited. Data governance is reliant on partners like StealthBits but does provide granular controls. Reference customers cited risk management and workflows as top challenges. RSA is best for organizations that value user provisioning and access certification above other

capabilities.

- **Hitachi ID is targeting vertical industries, starting with higher education.** Hitachi ID is a long-established Canadian IMG and privileged identity management provider, and a subsidiary of Hitachi Vantara. Hitachi ID is revamping and reinvesting in its IMG platform and is moving forward with a market approach that leverages marketing and professional services capabilities of its parent company. The vendor is targeting the higher education vertical. The vendor's commercial model resonates well with budget-conscious customers. However, the execution roadmap does not yet prove out a differentiated vision and innovation roadmap, and the vendor trails competitors in SaaS delivery options. The vendor's roadmap consists of building new restful API frameworks; adding support for OAuth, OIDC, and SCIM; and moving toward a central dashboard view with anomaly detection for troubleshooting and remediation. Hitachi ID also plans to design the user experience for graphical business process modeling and workflows. Hitachi ID's Bravura Identity has decent access certification with peer group and risk classifications, along with a mobile app interface for added convenience. However, lifecycle management, role management, dashboards, and reporting capabilities are more limited than other offerings in this evaluation. Reference customers cited account creation challenges related to user provisioning, a lack of role-based access controls, and challenges with reporting and dashboards. Cloud and SaaS governance is not present in the offering. Hitachi ID's Bravura Identity is best for customers that want a cost-effective solution with decent user provisioning and compliance management capabilities and for those in key verticals it serves, such as higher education.

## Evaluation Overview

We evaluated vendors against 21 criteria, which we grouped into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include lifecycle management, role management, compliance management, risk management, cloud platform and SaaS application governance, application integrations, and dashboards and reporting.
- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, execution roadmap, market approach, innovation roadmap, supporting products and services, delivery model, and commercial model.

- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's annual revenue, average deal size, and number of employees/engineers all specific to IMG products.

## Vendor Inclusion Criteria

Forrester included nine vendors in the assessment: Hitachi ID, IBM, Micro Focus, Omada, One Identity, Oracle, RSA, SailPoint, and Saviynt. Each of these vendors has:

- **IMG revenue.** The vendor had more than \$30 million in IMG-specific revenue for calendar year 2020.
- **Strong market awareness.** The vendor is frequently mentioned by IMG competitors and has significant interest from Forrester clients; Forrester considered the level of interest and feedback from our clients based on our various interactions, including (but not limited to) inquiries, advisories, consulting engagements RFPs we hear about, and other interactions.
- **A comprehensive IMG platform that addresses heterogeneous environments.** We included IMG vendors that demonstrated thought leadership and solution strategy execution by regularly updating and improving their productized product and model portfolio. Customers of vendors had to report that the solution is a comprehensive IMG solution with global presence that is purpose-built for providing the full breadth of IMG capabilities including access governance, provisioning, user lifecycle management, access certification, and SoD enforcement, based on the vendor's own intellectual property (IP). The vendor's IMG platform must also support heterogeneous environments, including on-premises, clouds, and a diverse set of enterprise applications (e.g., ERP, CRM, etc.).

## Supplemental Material

### Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

### The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester

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follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by August 30, 2021 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ And New Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

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