

Now Tech: Customer Identity And Access Management (CIAM), Q2 2020

Forrester's Overview Of 24 CIAM Providers

by Andras Cser
June 24, 2020

Why Read This Report

You can use CIAM solutions to register, profile, authenticate, and provide customers with self-service. CIAM solutions also serve and secure the identity aspects of marketing campaigns, customer acquisition, and retention and loyalty programs. But to realize these benefits, you'll first have to select from a diverse set of vendors that vary by size, functionality, geography, and vertical market focus. S&R pros should use this report to understand the value they can expect from a CIAM provider and to help select the vendor best aligned with your specific requirements.

Key Takeaways

Improve Customer Experience And Retention With CIAM

CIAM solutions play an important role in customers experiencing a delightful, low-friction set of interactions with your company. How intuitive and easy it is to register, log in, change your password, and profile all depends on a well designed and implemented CIAM solution.

Select Vendors Based On Size And Functionality

Business background CIAM suite vendors have approached CIAM from the marketing and business intelligence (BI) user management perspective. Security background CIAM suite vendors approach CIAM by providing security and authentication-centric tools.

Maximize CIAM Value By Engaging AppDev, Marketing, And Privacy

To a great extent, success of CIAM implementation and maintenance depends on successful and ongoing collaboration between S&R pros, AppDev, marketing, and privacy departments and colleagues. Forrester's interviewees said that you can't build a future-proof and robust CIAM solution in any one of those siloes alone.

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by [Andras Cser](#)
with [Merritt Maxim](#), Benjamin Corey, and Peggy Dostie
June 24, 2020

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Improve Customer Experience And Retention With CIAM

Customer-facing identity and access management (CIAM) plays a significant role in helping today's digital businesses acquire and retain customers, while providing them with the necessary security features and personalization for them to engage and transact with the company.

Forrester defines CIAM as:

CIAM is a collection of tools and processes that provide: 1) security (registration, authentication, authorization, and self-service) core functionality identity and access management and 2) integration and workflows with marketing management, portals, CRM, master data management (MDM), business intelligence (BI), security analytics (SA), and other nonsecurity solutions for managing customers across all channels, including web, mobile app, phone, kiosk, mail, and in person.

Customers' expectations when buying CIAM solutions focus on the following features. CIAM solutions should:

- › **Support identity verification integration (IDV), progressive profiling, and privacy.** CIAM tools need to integrate with IDV solutions so that the company knows who it registers. Social and progressive profiling allow customers to use their social established digital identity to simplify new user registration. All CIAM solutions should support your privacy policies.
- › **Provide granular authentication and multifactor and passwordless authentication.** Providing centralized access policy enforcement by allowing admins to configure contextual and granular authentication policies, as well as multifactor and passwordless authentication, keeps fraudsters out while preserving a delightful cross-channel authentication experience.
- › **Offer integration with A/B testing, marketing, loyalty, and business systems.** CIAM solutions should allow the company to seamlessly integrate site analytics, marketing, client relationship management (CRM), and MDM. This lets the firm conduct easier A/B testing experiments and enables the CIAM solution to serve as the hub for all marketing campaigns.

Select Vendors Based On Size And Functionality

We've based our analysis of the CIAM market on two factors: market presence and functionality.

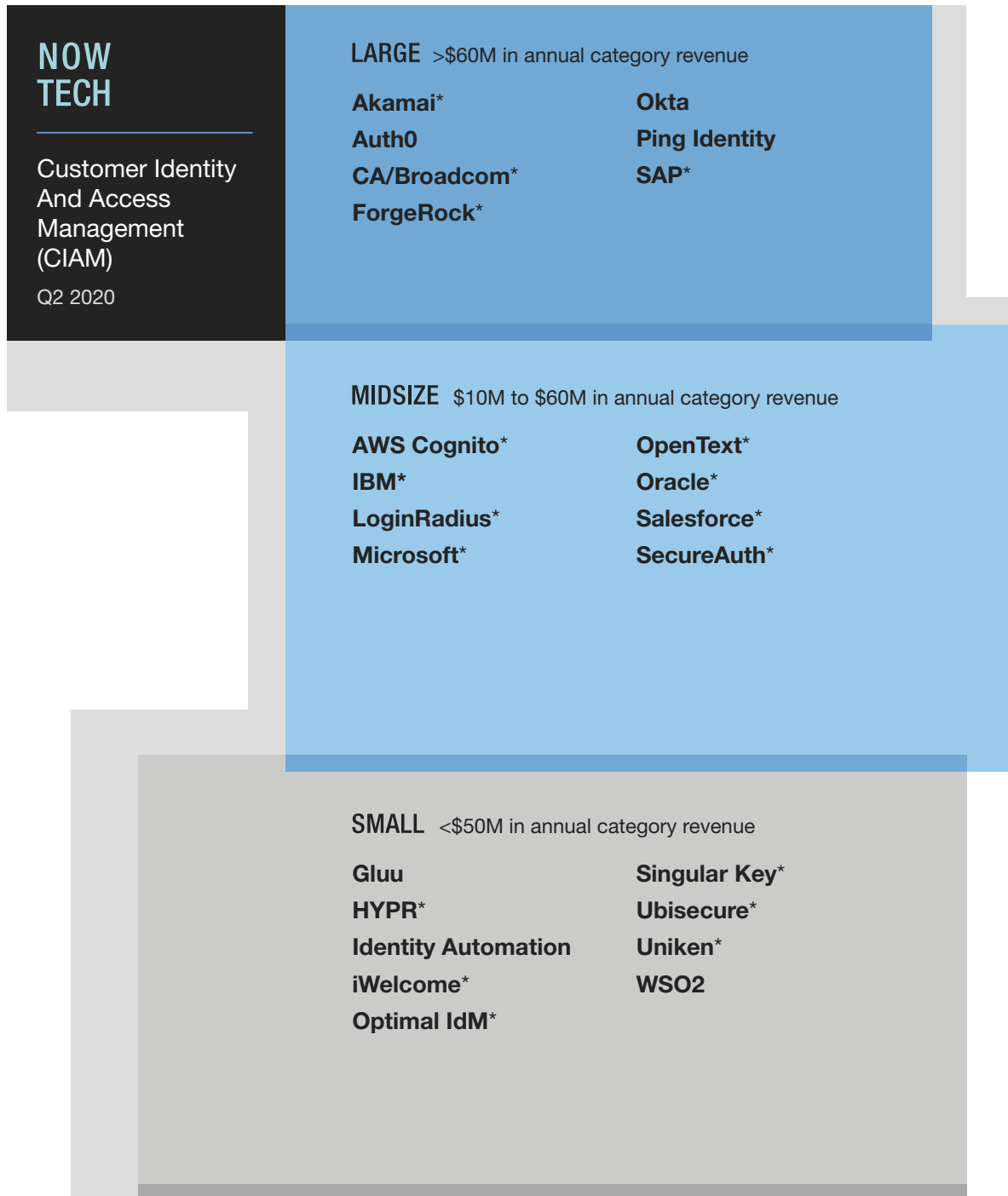
CIAM Market Presence Segments

We segmented the vendors in this market into three categories, based on CIAM revenue: large established players (more than \$60 million in CIAM revenue), midsize players (\$10 million to less than \$60 million in revenue), and smaller players (less than \$10 million in revenue) (see Figure 1). We did not include vendors that we estimated to have less than \$1 million in revenue.

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FIGURE 1 Now Tech Market Presence Segments: Customer Identity And Access Management, Q2 2020



*Forrester estimate

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CIAM Functionality Segments

To explore functionality at a deeper level, we broke the CIAM market into two segments, each with varying capabilities (see Figure 2):¹

- › **Security background CIAM suites.** These solutions evolved from general-purpose, security-centric, and technical (and in many cases on-premises) IAM solutions that were aimed at the IAM and security buyer at a company. They support a broad range of IAM standards (such as FIDO 1.x, FIDO 2, SCIM, SAML, OIDC, etc.) via APIs, mobile apps, and on the web. These suites can provide low-code or no-code integration with the vendor's own and third-party passwordless, multifactor, and biometric authenticators and usually have a granular authentication policy definition.
- › **Business background CIAM suites.** These solutions have pedigree with loyalty and marketing management, privacy, and user management offerings that were designed primarily for marketing buyers. These solutions have traditionally excelled in CRM, MDM, and business intelligence support and integration to help meet privacy, user self-service profile management, and social identity registration requirements. These vendors subsequently added security capabilities to these solutions.

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FIGURE 2 Now Tech Functionality Segments: Customer Identity And Access Management, Q2 2020



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Align Individual Vendor Solutions To Your Organization's Needs

The following tables provide an overview of vendors with details on functionality category, geography, and vertical market focus (see Figure 3, see Figure 4, and see Figure 5).

FIGURE 3 Now Tech Large Vendors: Customer Identity And Access Management, Q2 2020**LARGE** >\$60M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Akamai*	Business background CIAM suites	NA 70%; LATAM 5%; EMEA 15%; AP 10%	Retail, eCommerce, wholesale; high-tech; manufacturing	Philips; Sanofi; Shell
Auth0	Security background CIAM suites	NA 57%; LATAM 3%; EMEA 28%; AP 12%	High-tech; retail, eCommerce, and wholesale; insurance	AutoTrader; The Economist; Jersey Mike's
CA/ Broadcom*	Security background CIAM suites	NA 70%; LATAM 2%; EMEA 16%; AP 12%	Financial services; teleco retail; government	Vendor did not disclose
ForgeRock*	Security background CIAM suites	NA 46%; LATAM 2%; EMEA 44%; AP 8%	Financial services; public sector; retail, eCommerce, and wholesale	BBC; Geico; State of Utah
Okta	Security background CIAM suites	NA 65%; LATAM 5%; EMEA 20%; AP 10%	Financial services; high-tech; insurance	Adobe; Albertson's; Canal+
Ping Identity	Security background CIAM suites	NA 78%; LATAM 5%; EMEA 10%; AP 7%*	Financial services; healthcare and life sciences; retail, eCommerce, and wholesale*	Allied Irish Bank; Blue Cross Blue Shield of Tennessee; HP
SAP*	Business background CIAM suites	NA 40%; LATAM 10%; EMEA 40%; AP 10%*	Retail, consumer products; travel and transportation	BCD Travel; Maxim Integrated; Valora

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 4 Now Tech Midsize Vendors: Customer Identity And Access Management, Q2 2020**MIDSIZE** \$10M to \$60M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
AWS Cognito*	Security background CIAM suites	NA 80%; LATAM 5%; EMEA 10%; AP 5%*	Financial services; manufacturing; high-tech*	Vendor did not disclose
IBM*	Security background CIAM suites	NA 50%; LATAM 10%; EMEA 25%; AP 15%	Financial services; public sector; manufacturing	Post Luxembourg
LoginRadius*	Security background CIAM suites	NA 55%; LATAM 4%; EMEA 24%; AP 17%	Media and publications; consumer brands and services; public sector	City of Surrey; ITV; Weather Network
Microsoft*	Security background CIAM suites	NA 80%; LATAM 5%; EMEA 10%; AP 5%*	Financial services; public sector; retail, eCommerce, and wholesale	FIFA; New Zealand Ministry of Education; Subway
OpenText	Security background CIAM suites	NA 43%; LATAM 12%; EMEA 32%; AP 13%	Manufacturing; insurance; financial services	Auto Club Group (AAA)
Oracle*	Security background CIAM suites	NA 55%; LATAM 5%; EMEA 30%; AP 10%*	Retail, eCommerce, and wholesale; utilities; public sector	City of San Francisco; Loblaw Companies; SPAR
Salesforce*	Business background CIAM suites	NA 65%; LATAM 5%; EMEA 20%; AP 10%*	Retail, eCommerce, and wholesale; healthcare and life sciences; manufacturing	Vendor did not disclose
SecureAuth*	Security background CIAM suites	NA 80%; LATAM 0%; EMEA 15%; AP 5%	Healthcare and life sciences; retail, eCommerce, and wholesale; hospitality	Bass Pro; Delta Dental; Equifax

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 5 Now Tech Small Vendors: Customer Identity And Access Management, Q2 2020**SMALL** <\$10M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Gluu	Security background CIAM suites	NA 50%; LATAM 10%; EMEA 30%; AP 10%	Public sector; financial sector; telco and communications	CenturyLink; Invesco; Municipality of Dubai
HYPR*	Security background CIAM suites	NA 74%; LATAM 1%; EMEA 5%; AP 20%	Insurance; financial services; retail, eCommerce, and wholesale	Aetna/CVS Health; Rakuten; VHI Healthcare
Identity Automation	Security background CIAM suites	NA 100%	Retail; eCommerce; wholesale	Chicago Public Schools; North Carolina Department of Public Instruction; PROs
iWelcome*	Business background CIAM suites	EMEA 100%	Insurance; financial services; utilities*	European Space Agency; Innogy; PostNL; Royal Library of The Netherlands; USG People
Optimal IdM*	Security background CIAM suites	NA 80%; LATAM 5%; EMEA 10%; AP 5%*	Services; healthcare and life sciences; retail, eCommerce, and wholesale*	ADP; Farmers Insurance; Florida Dept. of Education
Singular Key*	Security background CIAM suites	NA 80%; LATAM 0%; EMEA 0%; AP 20%	Financial services; retail, eCommerce, and wholesale; high-tech	Indian Bank; Trayt

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 5 Now Tech Small Vendors: Customer Identity And Access Management, Q2 2020 (Cont.)**SMALL** <\$10M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Ubisecure*	Business background CIAM suites	NA 5%; LATAM 3%; EMEA 90%; AP 2%*	Utilities; public sector*	Finnish Government; Grano; Metsaverkko
Uniken*	Business background CIAM suites	NA 10%; LATAM 10%; EMEA 10%; AP 70%	Financial services; retail, eCommerce, and wholesale; public sector	Bank of India; Finabank; Pujab National Bank
WSO2	Security background CIAM suites	NA 48%; LATAM 5%; EMEA 36%; AP 11%	Public sector; financial services; healthcare and life sciences	GE Healthcare; Nutanix; Västtrafik, Sweden

*The vendor did not provide information for this cell; this is Forrester's estimate.

Recommendations

Maximize CIAM Value By Engaging AppDev, Marketing, And Privacy

Implementing a commercial off the shelf (COTS) CIAM solution almost always makes sense for firms that manage at least 5 million to 8 million identities. Here's what S&R pros should pay attention to:

- › **Consolidate user stores for multiple brands.** A company may have its customer data stored in multiple legacy user directories (LDAP/AD, RDBMS, etc.) These multiple user stores are hard, error prone, expensive, and difficult to integrate with CIAM solutions. To ensure a smooth CIAM deployment (whether transition from a home grown or brand new rollout), identity store integration, consolidation, and elimination is an absolutely critical piece of homework. Fewer identity stores mean faster registration, authentication and authorization processes, easier session management, and much simpler CRM and MDM integration.
- › **Don't underestimate application and portal integration.** CIAM ultimately is only a hub for registering, logging in, managing and deregistering users and their devices — a big part of the user's experience hinges on how the CIAM solution integrates with customer-facing business apps and portals. Ruthlessly reducing and removing registration, authentication, and coarse-grained authorization logic from these apps is both a political and technical challenge that requires careful planning. Freeing up developers from mundane, CIAM-related tasks to allow them to focus on expanding application business functionality is a very common way to justify centralized CIAM solutions.
- › **Collaborate with marketing and privacy folks early on.** S&R pros should provide a solution to help lives of their marketing, line-of-business, and product management brethren to be successful in implementing and maintaining a CIAM solution. Since CIAM solutions have business (marketing, CRM, MDM, and BI) system integration, they can easily become the identity hub of the firm's loyalty and marketing programs. Choosing a flexible, easy-to-change, and API-based CIAM system also reduces the time to adapt the CIAM to quickly changing business and security requirements.

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Supplemental Material

Market Presence Methodology

We defined market presence in Figure 1 based on factors such as the vendor's annual CIAM revenue and number of paying customer organizations in production.

To complete our review, Forrester requested information from vendors. If vendors did not share this information with us, we made estimates based on available secondary information. We've marked companies with an asterisk if we estimated revenues or information related to geography or industries. Forrester fact-checked this report with vendors before publishing.

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Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

Auth0	OpenText
Akamai	Optimal IdM
ForgeRock	Oracle
Gluu	Ping Identity
HYPR	Salesforce
IBM	SAP
Identity Automation	SecureAuth
LoginRadius	Singular Key
Microsoft	Uniken
Okta	WSO2

Endnotes

¹ See the Forrester report "[The Forrester Customer-Obsessed Identity And Access Management Operating Model.](#)"

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