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No More Privilege: The Trend Toward Unified, Security-Focused Identity Solutions

An Impact Leaders Report

April 2023

OWN YOUR
IDENTITY.



Introduction.

In 2023, chief information security officers (CISOs) and directors of identity and access management (IAM) are investing heavily in unified identity solutions with strong security at the core. This marks an adjustment from the trend over the last three years focusing on remote employee strong authentication and extends security across all identity components. CISOs claim that they face dramatic shifts in culture and security as work-from-home gives way to return-to-office, all while employees turn coat and change jobs on a dime. Those shifts mean that every user's credentials are a pathway to devastating data breaches—every user is a privileged access user.

Vendors like Microsoft and investment firms like Thoma Bravo have responded by rapidly adding identity functionality to their respective portfolios. However, CISOs interviewed for this report are, with few exceptions, looking to security-focused vendors to produce a unified, security-focused identity platform, fabric, or experience.

Methodology

Impact Leaders, on behalf of RSA Security, interviewed at length 25 executives in large enterprises on their spending plans for 2023 and their perceptions of identity strategy, technologies, and trends.

Furthermore, in January 2023, Impact Leaders consulted by telephone six senior executives at large firms with average revenues of US\$40bn for relevant quotes and insights on their views of unified, security-focused, identity.

About Impact Leaders

Impact Leaders is an advisory firm providing insights on leadership, strategy, and operations to hundreds of IT executives—as well as to the technology and service providers that support them. Comprising former senior technology, strategy, and operations executives as well as experienced researchers and consultants, our experts provide actionable advice to our client base, leveraging deep insights developed via our extensive network of clients and other industry contacts.

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A Vision Of Unified, Secure Identity.

CISOs view a single security-centered vendor as the right identity partner for the future. Impact Leaders' research shows that CISOs have strong opinions about why identity is their focus now, why a unified experience matters, and why a security focus by their preferred identity providers is paramount.

Identity matters most

IT executives feel pressure to extend data protection from simple perimeter defense to defense-in-depth. Identity is arguably the furthest extension of that concept: it is the new perimeter as employees work from home, co-working spaces, and public places.

According to the 2022 Verizon Data Breach Investigations Report (DBIR), 82% of breaches involved the use of stolen credentials, phishing, and other human-related vulnerabilities.¹

No organization is safe without a plan to handle credentials, phishing, and other vulnerabilities securely.² The DBIR also showed that criminals are growing their exploitation of user credentials at a rate to match the last five years combined.³

Whether an organization is just dipping a toe in the "strong authentication" pond or revamping access controls to support a sudden shift to a remote workforce, Identity represents more than just another security project. It is the most accurate barometer of the overall health of a risk management program.

"Without well-oiled identity and access management, every other security dollar is wasted."

**-CTO OF A TRADE
CLEARING FIRM**



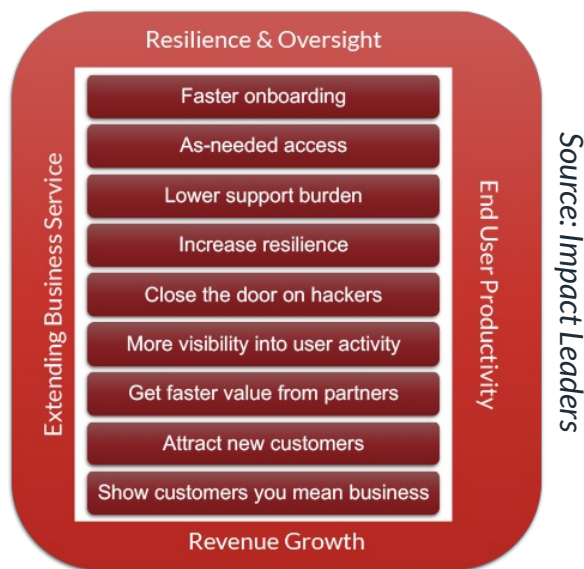
100% of CISOs and technology leaders surveyed value cost-effectiveness over cost alone.

When a company is growing—organically or by acquisition—it can rely on identity to ease integrations of acquired companies and to help entering employees to have an easier transition and faster time to full productivity. It also helps with layoffs; deprovisioning is easier because it can be automated. In short, identity is the foundation of technical risk management.

Identity creates value

IT and security executives interviewed for this report detailed their strategies for enrolling support for unified, security-focused identity. They said they get more budget, more headcount, and more enduring support from senior management for identity initiatives by keeping a laser focus on value at both the top and bottom of a balance sheet. The bottom line shows the value of costs avoided, like risk reduction, downsizing, and so forth, while the top line shows the value of benefits received, like revenue, new business, renewal rates, etc.

Unified, security focused identity tracks on both the top and bottom lines of the balance sheet in four themes (Figure 1).



Source: Impact Leaders

Figure 1: Business drivers for identity solutions

“Identity makes every part of our business easier, faster and more customer-oriented.”

–CIO, FORTUNE 1000 INSURANCE COMPANY



100%

of CISOs and technology leaders surveyed value cost-effectiveness over cost alone.

Identity Matters Most.

CISOs are looking to identity to form the foundation of security and risk management. Identity should be unified, security-centered, and integrated with Microsoft and the cloud.

Unified identity

More than half of CISOs reported the “most aggravating” aspect of identity is working with four or more identity vendors. Two-thirds of CISOs prefer having one or two identity providers rather than multiple vendors.

While only a few CISOs (less than 10%) think that a decade from now the cybersecurity market will consolidate to a handful of big providers, like Microsoft, Palo Alto Networks, Amazon, and Thoma Bravo, that is simply unlikely.

Consolidation in the security industry has been tried dozens of times over the last forty years and it just does not work.

Large cloud providers are scrambling today to build out product portfolios and to integrate in a few years what organizations have spent decades fine-tuning in their own data centers.

The rush to be “all things IT” by these big providers creates a natural resistance in enterprise adoption, because large cloud providers will not keep up with fast-moving business dynamics and a rapidly evolving threat landscape. Moreover, large corporations will not put all their eggs in one cloud-provider basket, according to Impact Leaders research.

Large cloud providers do not focus on security. They may take it seriously, but that is different than making it their *raison d'être*. Today and for years to come, CISOs plan to use specialized vendors to tackle the biggest slices of the IT security pie.

Identity is one of those slices that CISOs want to take care of in one bite.

“I want a unified experience across all platforms.”

**–GLOBAL DIRECTOR OF IAM
AT ONE OF THE LARGEST
INVESTMENT FIRMS IN THE
WORLD**



2/3_{rds}

of CISOs prefer having one or two identity providers rather than multiple vendors.

Security first

72% of IT executives say security is the primary factor when choosing an identity provider.

CISOs seeking identity solutions today want a vendor partner they can count on, one that integrates the entire identity infrastructure and lifecycle, and one that has an intense focus on security.

“Windows can’t be our sole security partner. It just doesn’t do enough to secure and integrate with our fragmented environment and hundreds of downstream apps.”

–CISO, \$30BN CONSUMER PRODUCTS COMPANY

One CISO said this when asked why they preferred a unified product portfolio from a security-focused provider:

“Our employees often don’t have smart phones at work, yet we still need high security across every part of our identity and access footprint. I have high hopes for passwordless multi-factor authentication (MFA) in the future, but today I need a partner who can get identity done, get it working, and keep it secure,”

–EXECUTIVE, FORTUNE 500 CHIP MANUFACTURER

“We put security first in all decisions, not cost or compliance. After all, if we are secure, we are, by definition, compliant and cost-avoidant.”

–EXECUTIVE, FORTUNE 500
CHIP MANUFACTURER



72%

of IT executives say security is the primary factor when choosing an identity provider.

One national credit union received, according to its CIO, US\$2.9M in net benefits to infrastructure and risk over a two-year period by deploying a unified, security focused identity solution.

“We heard horror stories from peers at other credit unions, and from local companies in healthcare, who have been attacked and had to pay ransoms in bitcoin or be out of service for days or weeks while restoring operations. We knew for us it was just matter of time until we got hit.”

-EXECUTIVE, NATIONAL CREDIT UNION



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Identity Integrated with Microsoft and the Cloud.

Microsoft is an incumbent and respected provider of on-premises infrastructure in most enterprises. Microsoft is also a respected cloud services provider with a growing portfolio of solutions for the cloud.

84% of respondents want security solutions to integrate with Microsoft, while 92% do not want to rely entirely on Microsoft security.

The challenge CISOs face is that Microsoft does not offer the same products with the same functionality to both the cloud and on-premises environments. It is essentially two portfolios of products that cannot duplicate performance in their respective deployments.

“The future of MFA is not Windows Hello. I mean, c’mon!”

–CISO AT A \$20BN DEFENSE CONTRACTOR

“Microsoft is both (in the cloud and on-premises), but it’s like they are two separate companies providing different solutions. The on-premises Microsoft can’t do what the cloud Microsoft does, and vice versa.”

–CISO OF A FORTUNE 100 FINANCIAL SERVICES COMPANY



92%

of respondents do not want to rely entirely on Microsoft security.

Conclusion.



Every credential is a target to sophisticated criminals; therefore every user should be treated as having privileged access.



Identity is the aspect of IT infrastructure that has the greatest impact on an organization's risk.



CISOs prefer unifying identity to having one or two providers.



Security focus is the primary factor used in selecting an identity provider.



A unified, security-focused identity provider produces measurable benefits in both risk avoidance and overall organizational productivity.

¹Verizon 2022 Data Breach Investigations Report, page 8.

²Ibid., page 7.

³Ibid.





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About RSA

RSA, the security-first identity leader, provides the complete identity and access management (IAM) platform all businesses need to operate securely, effectively, and successfully. Trusted by 12,000 organizations in government, energy, healthcare, and finance for authentication, lifecycle management, access, and identity governance solutions, RSA manages 25 million enterprise identities and secures access for millions of users.

Learn why at [RSA.com](https://www.rsa.com)

