IDPro 2020 Skills and Program Survey

Executive Summary

This is the third annual skills and programs survey of the digital identity industry executed independently by IDPro, and thanks to the ongoing support of our members. The survey helps to inform the digital identity management industry who its practitioners are and where their interests lie. Through the 2020 survey, IDPro has determined that:

- Digital transformation trends, accelerated by the pandemic, present challenge and opportunity in equal measure to digital identity teams.
- Practitioners continue to seek out and to value vendor-neutral training and mentoring opportunities.
- Evidenced by the length of time it takes to feel confident in the profession, the breadth of established technical skills and the importance of soft skills such as lateral thinking, 'digital identity' emcompasses a wide range of technical and business areas, and continues to develop rapidly in breadth and complexity.
- Intersections with the adjacent areas of Privacy and Security are increasingly important.
- Enterprise near-term priorities align with individual interests in some areas; misalignment between enterprise near-term priorities and individual interests present opportunities for both.

Individual practitioners should consider developing peer and mentoring relationships across and beyond the industry; and should be watchful of business and societal trends that may influence the technologies they will need to become proficient in.

Team leaders and managers should be conscious of the need for training and mentoring—particularly but not exclusively with a remote workforce—and should actively enable team members to participate in industry bodies and standards groups, as a win-win for both the individual and the organisation.

Executives and CEOs should ensure that digital identity is appropriately represented at the board level, to ensure that opportunities to assure, enhance and accelerate digital transformation initiatives are not missed.

Message from the President

I'm excited to formally share the 2020 results of our skills and program survey. As we have mentioned before, this research is wholly unique in taking a look at our industry and its practitioners. Central to IDPro's mission is helping digital identity practitioners learn from others in the field. This survey is a realization of that vision.

Organizations and individuals alike benefit from the insights found in this data. One aspect I really appreciate is the non-technical skills that have helped professionals in their careers. So many of us arrive in digital identity from unconventional origins. Knowing that can guide individuals in discovering new areas in which to invest their time, and can help organizations think about training & development goals with a new perspective on the skills that matter most in their success.

This year's survey was completed largely before the pandemic took hold, so it will serve as an interesting baseline for next year's results to see where and how our industry changed in response.

Given that this is our 3rd year of running the survey, it is also interesting to see where trends may be developing or waning. While we do develop our own thoughts on this data, we're also extremely interested in the insights from both our membership and those outside of IDPro as to how we can best apply these discoveries. Your comments on the survey are welcome at survey-feedback@idpro.org. I look forward to seeing where these findings take us in the future both personally, and as an industry.

— Lance Peterman, President, IDPro, October 5, 2020

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Introducing the IDPro 2020 Skills and Program Survey

Findings

A growing industry, with a growing need

For the 2020 Survey, consistent with 2019, we solicited responses from IDPro membership and, separately, from the industry generally. Overall response numbers were up year-over-year, in both categories—there is greater awareness of the industry as a whole, and of the role IDPro plays within it. Results and conclusions drawn are consequently increasingly representative of the overall state of the industry.

Equally interesting is to note those sectors that are over- and, arguably, under-represented in the responses. The majority of respondents are consultants in the industry; with healthy contributions from financial services, software and cloud computing vendors, and healthcare. Surprisingly, perhaps, given the importance of identity in the sector, there are relatively few respondents from the automotive sector.

The distribution of respondents across sectors likely has more to do with the reach of the survey at this stage, rather than the penetration of digital identity technology in those particular sectors. However, the sector in which a given respondent is active may have some impact on the other results in the survey. Anecdotal evidence suggests that many identity consulting shops are small companies (or sole traders)—this is supported in the survey by the correlation between the number of 'Consulting' respondents and the number of sub-500 staff companies represented.

Smaller companies and consulting shops are likely to have specific needs around skills developing and mentoring. Of particular importance to these groups will be the availability of vendor-agnostic training materials, and opportunities to develop skills by working with peers across the industry (rather than relying on in-house training programs). It seems likely that this will also apply in large part to small digital identity groups within larger organisations; and it's no surprise that these are the top two "desired tools for success".

Seeing the pandemic through practitioners' eyes

When IDPro kicked off this year's survey in February, little did we know what lay in store for all of us globally. COVID-19 has had profound effects on our societies, our economies, and, most important, our psyches. Since this survey was still gathering results through the beginning of April, it does reflect some of the early impact of the pandemic. Respondents identified multi-factor authentication (MFA) as the top priority for their employers within

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the next 18 months. As organizations of all kinds shifted to a “work from home” default, so came the need to raise security postures. Getting sections of the workforce for whom remote work was never planned online and connected to corporate assets was no small feat. With that came the likely assumption that those workers’ devices were in hostile territory and MFA became a must.

If one considers MFA as a minimum ante for the newly and massively enlarged user population, then respondents' second enterprise priority—Identity as a Service (IDaaS)—should not be a surprise either. IDaaS, in theory, provides a more nimble means of delivering account management, Identity Governance & Administration (IGA), and Single Sign-On (SSO) than traditional approaches, and enterprises relied on that agility to adapt to the new normal.

However, as those of you who have lived through SSO and user provisioning deployments know, one does not simply roll out identity and access management infrastructure. While the pandemic and its associated increased need for workforce identity services might be a theory why respondents ranked IDaaS so highly, this might be more a case of correlation and not causation.

Ranked third, customer identity and access management (CIAM) is an expected enterprise interest in the COVID-19 era. Organizations in every geography and industry have dusted off their digitalization plans and redoubled their efforts to drive digital customer engagement. IDPro expects that if the Skills Survey was run in September of 2020, we’d see CIAM receiving more responses indicating a higher priority for enterprises.

Whereas MFA and IDaaS are subjects in which a majority of respondents have experience, CIAM is not. One could speculate that identity practitioners with CIAM experience are finding themselves in high demand as the pandemic continues on and enterprise needs for digitalization and engagement have yet to abate.

Lastly, it should not come as a surprise that respondents identified lateral thinking and adaptability as key non-technical skills to their success. On a good day, an identity practitioner should expect to have to be creative in order to deliver what their business peers need to be successful. Sadly, these are not the best of days, and in light of the pandemic, our ability to find novel solutions to our challenges is more important than ever—in both professional and personal settings.

Managing New and Emerging Technologies

As IDPro starts to collect data across multiple years, so we can begin to look at longer term trends. It’s already notable that professionals strive to stay ahead of their employers’ needs by learning about new capabilities before the organisation starts to prioritise projects that will need those technologies. As noted earlier, the top three ‘enterprise’ priorities (at least as understood by the respondents themselves) for the next 18 months are Multi-factor

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Authentication (MFA), Identity as a Service (IDaaS) and Customer Identity and Access Management (CIAM). MFA and IDaaS are areas in which individuals already have current or prior experience, and although IDaaS continues to be a topic that individuals will continue to focus their learning on, MFA has dropped out of the top 12 entirely—although it remains a focus for the enterprise.

The corollary of this is that organisations would be wise to keep an eye on those areas that identity professionals are focused on. These may become strategic priorities in the coming months and years, and may form useful input to overall go-to-market and business planning.

For instance: although respondents report decreasing interest in learning about blockchain, there is a corresponding increase in the perceived importance of self-sovereign identity. Activity in several standards working groups (SIOP, GNAP and UMA are all examples) makes it plain that 'self-sovereign' is no longer tightly coupled with a single technology approach; but is rather a general trend in the industry as a whole. Organisations would be well advised to consider the potential impacts (beneficial or otherwise) of these technologies to customer-, consumer-, and workforce-facing applications alike. It is perhaps no coincidence that identity professionals are also increasingly interested in Privacy as a topic.

Aligned and Mis-aligned Priorities

As previously mentioned, enterprise interests and individual practitioners' experience were quite well aligned in this year's Survey. MFA and IDaaS, both top enterprise priorities, aligned directly with practitioners' experience. This is likely a reflection of a combination of two facts: that over a third of respondents to this year's survey have been in the industry for more than 5 years; and that MFA is one of the primary entry points to the identity industry, with more than 70% of respondents indicating they have MFA experience.

While MFA is not amongst practitioners' areas of interest to learn in the next 18 months, IDaaS is respondents' number one. Although nearly 60% of respondents indicated they had experience with IDaaS, reflecting the growth of the market, that number will likely climb in years to come given this year's observed enterprise interest in IDaaS.

Although enterprise and individual learning priorities did have alignment in some key areas, two areas are misaligned: IoT and Blockchain. This continues a trend that IDPro observed in last year's survey. While 15% of respondents indicated that blockchain was an area of interest for themselves, this is compared to 3% of responses indicating it was a priority for enterprises. Similarly, 26% of individuals' responses indicated that self-sovereign identity was a priority compared to 4% of enterprises. Similarly, 22% of responses indicated that identity for IoT was a personal priority compared to 6% of enterprises.

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Last year's Skills Survey had similar results. 11% of responses indicated that IoT was a priority for enterprises with 7% for self-sovereign and 6% blockchain. Whereas, 26% of responses indicated that identity for IoT was a personal priority with 27% for blockchain and 25% for self-sovereign. An interpretation of this is that identity practitioners have a growth mindset, are drawn to difficult problems, and generally curious about new technologies and trends. One could infer that hard problems and novel solutions call to practitioners. IDPro added the questions about enterprise and individual priorities in 2019 and with next year's data, we will be able to draw more conclusions about the alignment and mis-alignment of priorities.

Methodology

The 2020 IDPro Skills and Programs Survey was an online survey. Responses were solicited from IDPro members and—via several public channels including Twitter, LinkedIn, and the IDPro web site—from non-members. The survey questions to both groups were identical, but responses were tagged to allow for comparison between these two groups. Respondents self-selected.

The Survey sets out to get a sense of the size, scale, and 'training' needs of the industry. This objective informs the question selection. The survey is designed to be quick and easy to answer in order to reduce as many barriers to responding as possible. Where appropriate, questions and responses are kept consistent year over year to allow for trend analysis. Prior years survey reports and data can be found on the IDPro website. This survey is made possible by the generous support of our members.

Tools

IDPro used SurveyMonkey to execute this anonymous survey and used a combination of SurveyMonkey and Microsoft Excel to analyze the data.

Response Rates

IDPro Member Responses	Non-member (public) responses
132 from 188 members and 30 corporate and enterprise member organizations	99

The 2020 survey attracted 52 more member responses compared with 2019. The 2020 survey attracted slighted fewer non-member responses than 2019 (down from 109), but this is unlikely to be significant.

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Survey Questions and Results

Demographics

The questions in this section examined the practitioner's years of experience, their location, and information about their employer.

Years in the Identity Industry

Survey Question

How many years have you worked in the identity industry or directly with identity technologies and systems?

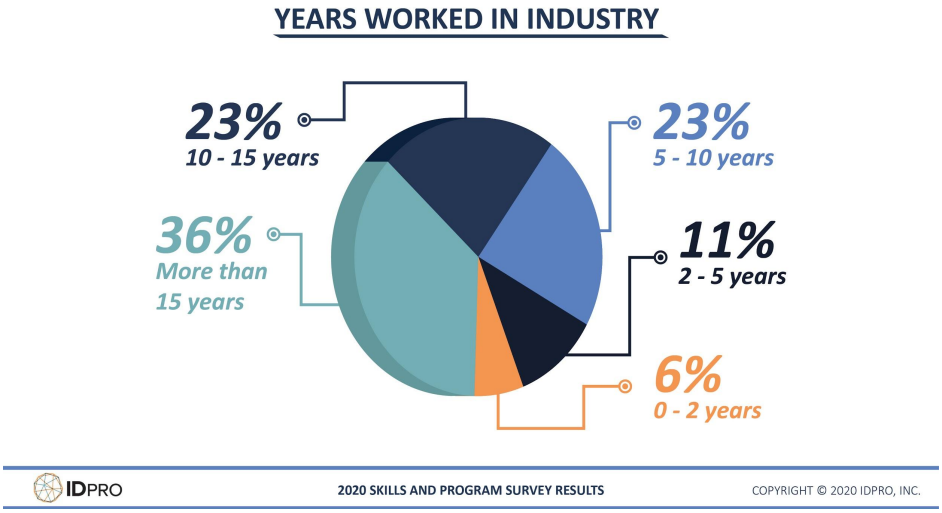
Potential Responses (select one)

- More than 15 years
- 10–15 years
- 5–10 years
- 2–5 years
- 0–2 years

Question Commentary

This question provided a sense of the depth and experience of the respondents and allows for segmentation of some of the other responses. Duration brackets are consistent across survey years, allowing for comparison.

Responses and Observations



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Consistent with prior years, the majority of respondents have been in the industry for more than 5 years, although we see a slightly uptick in the number of neo-pros. There is a clear opportunity to develop mentoring programs to provide support for professionals still in the early part of their careers. In spite of the relatively high level of experience, respondents continue to look to acquire new skills. Given the pace of change in the industry, this is evidence of engaged professionals who continue to seek ways to improve business outcomes, and to further their own careers and personal growth.

Location

Survey Question

In which geographic region are you based?

Potential Response (select one)

- Africa
- Australia and New Zealand
- Central America
- Europe
- India
- Japan
- Middle East
- North America
- Other (please specify)
- Other Asia
- South America

Question Commentary

We provided a selection of high-level geographies for respondents to select from (e.g. North America, Europe, etc.) to help us form a better picture of how the responses might be skewed and to allow for segmentation of some of the other responses. Regions are consistent across survey years, allowing for comparison.

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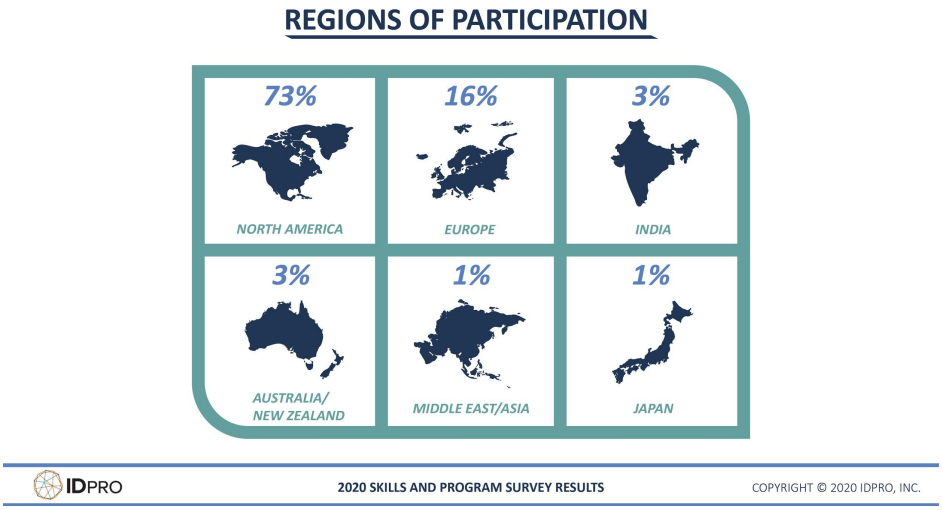
Responses and Observations



As expected, we continue to see a preponderance of respondents from North America. It is most likely that this is primarily due to the sample methodology; but it is important to remember these demographics in drawing any conclusions from other questions in this survey. As noted in prior years, the industry as a whole must also continue to consider how to foster global participation and exchange of ideas.

Industry

Survey Question

In what industry do you work?

Potential Response (select one)

- Aerospace and Defense
- Automotive
- Cloud Computing
- Consulting and Implementation Services (added for 2019)
- Consumer Packaged Goods
- Enterprise Software (added for 2019)
- Financial Services
- Healthcare and Life Sciences
- Higher Education and Research
- Insurance (added for 2019)
- K-12 Education
- Manufacturing
- Media and Publishing
- Other (please specify)

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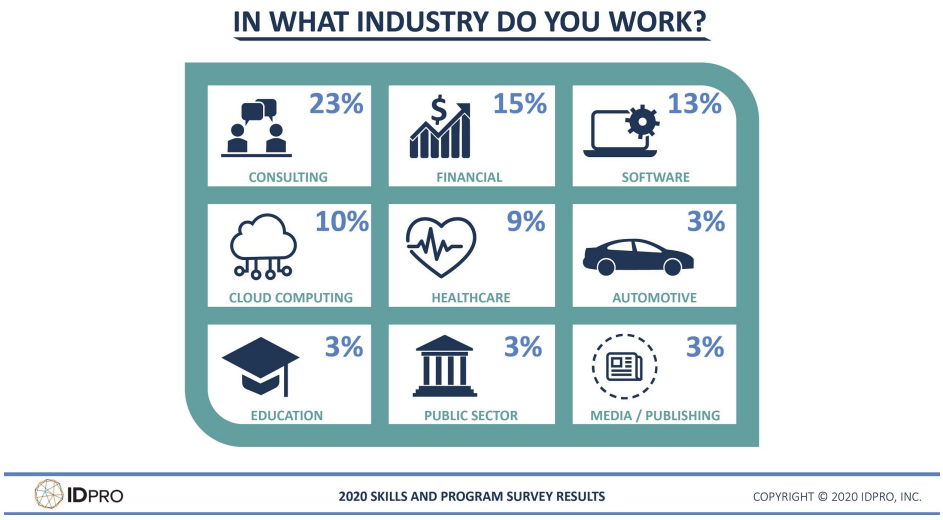
- Public Sector
- Retail
- Telecommunications

Question Commentary
The list of 16 categories, plus a free text 'other' option, has been kept consistent since 2019 (3 responses were added in 2019).

Responses and Observations



We continue to see a heavy weighting towards consulting services; and the relative positions of financial services and enterprise software are consistent with prior years. Healthcare, however, is the standout change this year—garnering a sufficient proportion of responses to make it into the top 5 represented categories. It's possible that this result is in part driven by the relatively small sample size. However, we also know that identity has significant focus in the healthcare and life sciences industries, so it's not unreasonable to suggest that we should see a greater distribution of identity professionals in those industries as time goes on.

The industry in which a professional works will have some bearing on their skills and training needs. Consultants work with a variety of products and solutions—and are not always in control of those decisions—and so will be more likely to need vendor-agnostic training material. Self-sovereign solutions are arguably getting more traction in the healthcare industry, given the competing pressures of access and privacy. Security-focused identity projects—such as strong authentication or API protection deployments—are particularly relevant in the highly-regulated financial services sector.

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Response in the 'other' category—amounting to some 11% of the total responses—do not show a significant pattern, and we do not anticipate needing to adjust the response options for 2021.

Employer Size

Survey Question

How many employees does your employer have?

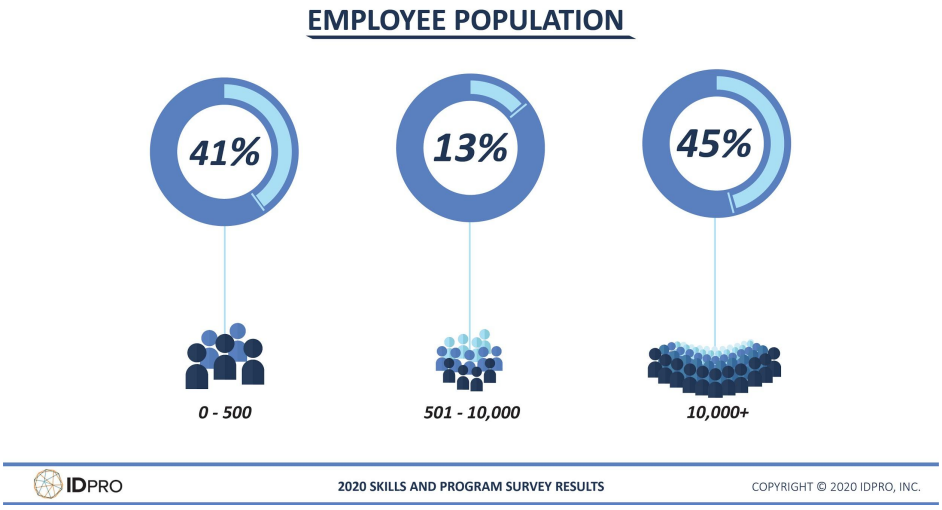
Potential Response (select one)

- 0–25 employees
- 26–50 employees
- 51–100 employees
- 101–500 employees
- 501–1000 employees
- 1001–10,000 employees
- More than 10,000 employees

Question Commentary

The 7 bracket sizes available as potential responses have been kept consistent since the first Survey in 2018.

Responses and Observations



There is relatively little change in the overall distribution of responses since the 2018/2019 survey – certainly not sufficient to have a meaningful impact on the conclusions drawn. The challenges that large organisations encounter in recruiting, training, career development and staff retention will be different—and will be dealt with differently—in comparison to

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the issues faced by small organisations. Industry programs will need to take this into consideration. Employers should also consider what programs may be needed to support new hires moving into a small company from a large one (or vice-versa).

Experience

Areas of Experience

Survey Question

Areas of identity in which you have current or previous experience.

Potential Responses (Select all that apply)

Access Certification	Identity Standards Development
API Protection	Mobile Identity Management
Blockchain (or similar) Identity	Multi-factor/Strong Authentication
Consortia-based Identity	Privacy-related Applications of Identity
Contextual/Risk-based Authentication	Privileged Access
Customer/Citizen Identity and Access Management	Role Management and/or Role-based Access Control
Directory Services including Active Directory	Security Applications of Identity
Fine-grained Authorization and/or Attribute-based Access Control	Self-sovereign or user-centric identity
IDaaS; Cloud Identity Management	User provisioning and Lifecycle Management
Identity for IoT and Connected Devices	Web Access Management and/or Federation
Identity Proofing/Vetting	Other

Question Commentary

The list of potential responses is unchanged from 2019.

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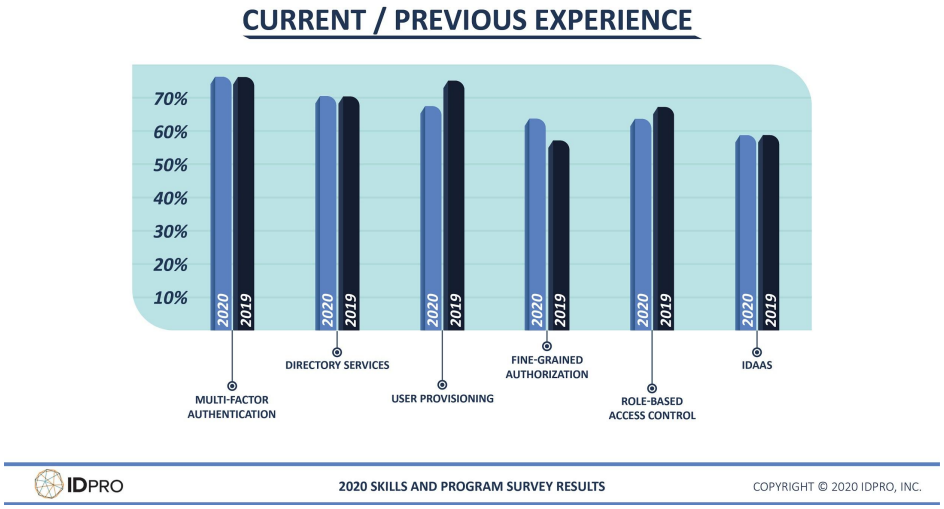
Responses and Observations



The top 6 responses are unchanged from last year—unsurprising, given the nature of the question (past experience only changes significantly as a result of net new respondents; given the sampling methodology, it is likely that we have a high percentage of repeat respondents).

It is most likely that the small changes we do see are in the main driven by new respondents; although professionals acquiring new skills will also have an impact.

The breadth of skills continues to be the most noticeable aspect of this question. Identity professionals are being asked to cover a wide range of specialisms, with consequent impact on the training and professional development needs of the industry.

Only a very small number of 'Other' responses were received, and they are not considered to be statistically significant.

Years to Proficiency

Survey Question

How long did it take you to feel that you're a proficient identity professional?

Potential Response

- 0 to 2 years
- 2–5 years
- 5–10 years
- 10–15 years
- More than 15 years

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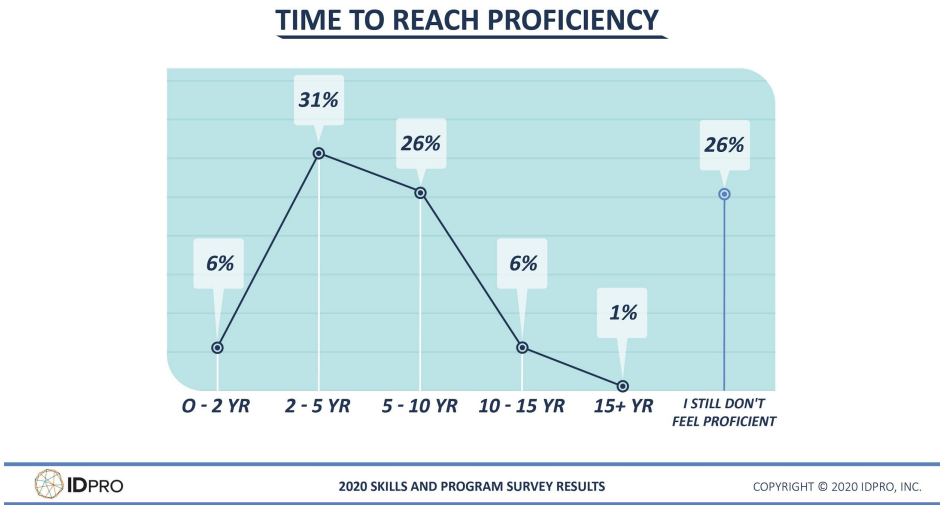
- I still don't feel proficient

Question Commentary
Since there is currently no formal qualification or certification for the digital identity professional, this question is necessarily and deliberately subjective. The time brackets are unchanged from 2019, so year-over-year comparisons can be made.

Responses and Observations



We continue to see a significant percentage of respondents recognising that they still don't feel proficient. Taken in conjunction with the previous question, we can hypothesize that identity professionals are continually asked to move into new areas of technical competence; in such an environment, it is unsurprising that professionals may feel they still have a lot to learn. These responders would benefit from mentorship programs, peer to peer networking, and vendor-neutral training materials.

The changes relative to the 2018/2019 survey are relatively small, and are likely explained by minor adjustments in sample composition and size.

Skills

Questions in this section explore which technical and non-technical skills practitioners rely upon to be effective as well as things they wish they had to make them even more successful.

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Technical Skills

Survey Question

Which of the following would you consider to be the top 3 technical skills that have served you well in your career with identity? (Choose no more than 3 skills.)

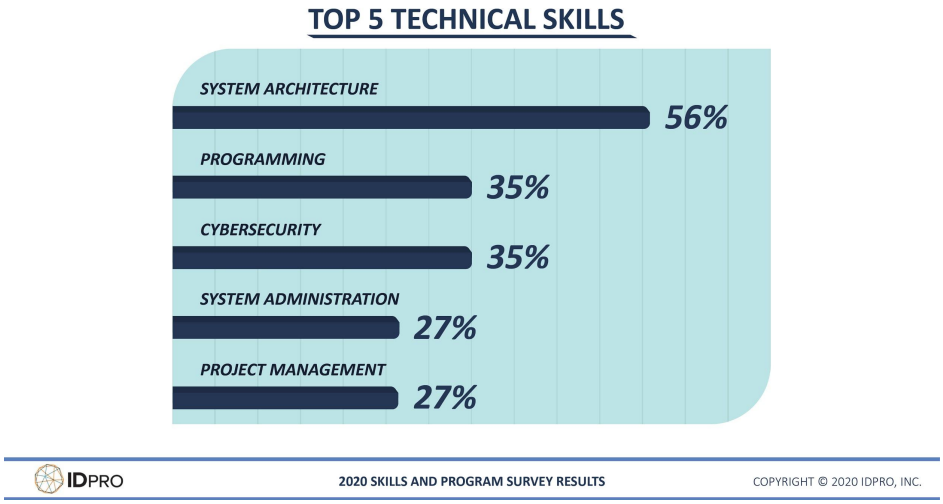
Potential Responses

- Cloud Architecture (added for 2019)
- Cybersecurity including threat modeling and cloud security (added for 2019)
- Data Modelling
- Data Science
- Database Administration
- Finance and accounting
- Networking and/or Network Management
- Other (please specify)
- Programming
- Project and Program Management
- System Administration
- System Architecture
- Technical Writing

Question Commentary

The list of responses is unchanged from 2019.

Responses and Observations



Relative to the 2019 responses, system administration has overtaken project management but the composition of the top 5 technical skills is otherwise unchanged. The importance of system architecture perhaps reflects the need identity professionals have to create optimal

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solutions by combining several different products and technologies together in a 'best-of-breed' approach.

Non-technical skills

Survey Question

Which of the following would you consider to be the top 3 non-technical skills that have served you well in your career? (Choose no more than 3 skills.)

Potential Responses

- Ability to work in a team
- Adaptability (added for 2019)
- Business Awareness
- Determination and grit
- Empathy
- Foreign language proficiency
- Humor
- Lateral thinking and problem solving
- Negotiating; pitching
- Oral communication and presentation
- Organization and management
- Other (please specify)
- Time Management
- Written communication

Question Commentary

The list of responses is unchanged from 2019.

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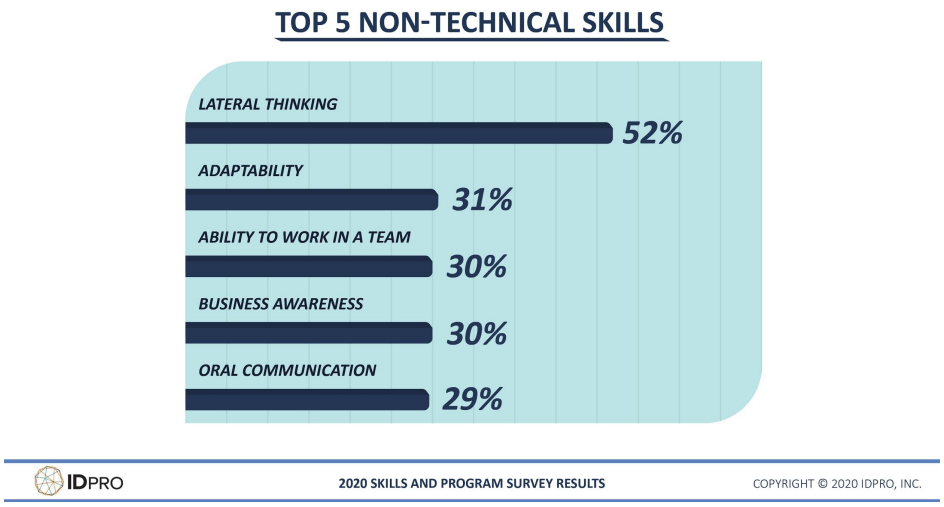
Responses and Observations



The composition of the top 5 responses is consistent with the 2019 survey results. However, the relative importance of Adaptability and Team Work have risen from 4th and 5th to 2nd and 3rd respectively; and Oral Communication has dropped to 5th. This could reflect changes that were starting to happen at the outset of the change in working patterns brought about by the responses to the COVID-19 situation.

Survey Question
How have these non-technical skills served you in your career?

Question Commentary
This was an open text question to garner additional insight into the reason respondents felt their non-technical skills were important.

Responses and Observations
The majority of respondents feel that their non-technical skills have served them well in their career, perhaps sometimes even more than their technical skills. In the industry, being able to think laterally and problem solve helps practitioners to adapt and create solutions for a variety of identity management issues as well as the ever changing identity trends. Followed by strong communication skills to help executives understand problems and solutions and to encourage investment in solutions to improve business practices and user experience. It also never hurts to have a good sense of humor!

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If You Could Have One Thing...

Survey Question

If you could have had one of the following, which do you think would have been most useful to you to ensure your success.

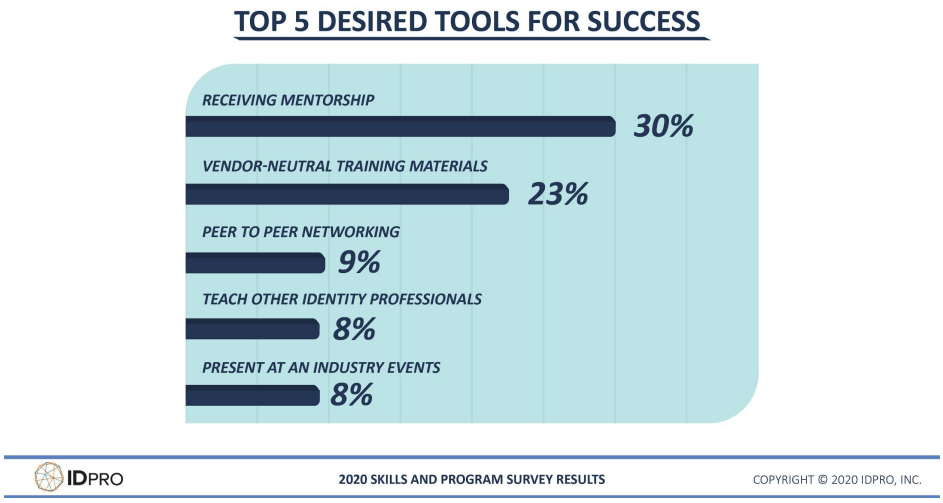
Potential Response

- Certification in one or more areas of identity
- Opportunities to blog or otherwise contribute to an industry newsletter or publication
- Opportunities to present at an industry meet-up or conference
- Opportunities to teach other identity professionals
- Other (please specify)
- Peer to peer networking opportunities
- Providing mentorship
- Receiving mentorship
- Vendor-neutral technical training materials

Question Commentary

Response options have remained unchanged since the introduction of the survey in 2018.

Responses and Observations



The overall focus of the responses continues to be around mentoring (which has held the top position every year) and vendor-neutral training, which is back to a level consistent with the 2018 survey after a slight dip in 2019. Larger employers might consider putting in place internal mentoring programs for digital identity professionals.

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Priorities

This section of the Survey explores what respondents consider to be their employer's top identity-related priorities for the next 18th months, as well as their own individual areas of interest. This helps to elucidate the differences between personal and corporate priorities and to explore any potential gaps in skillsets, training, development and staffing, at the trend level.

Enterprise Priorities

Survey Question

What are the top identity-related priorities for your organization (or your customers' organizations) in the next 18 months? (Choose no more than 3)

Potential Responses

- Access Certification
- API Protection
- Blockchain (or similar) Identity
- Consortia-based Identity
- Contextual/Risk-based Authentication
- Customer/Citizen Identity and Access Management
- Directory Services including Active Directory
- Fine-grained Authorization and/or Attribute-based Access Control
- IDaaS; Cloud Identity Management
- Identity for IoT and Connected Devices
- Identity Proofing/Vetting
- Identity Standards Development
- Mobile Identity Management
- Multi-factor/Strong Authentication
- Other (please specify)
- Privacy-related Applications of Identity
- Privileged Access
- Role Management and/or Role-based Access Control
- Security Applications of Identity
- Self-sovereign or user-centric identity
- User provisioning and Lifecycle Management
- Web Access Management and/or Federation

Question Commentary

The list of potential responses is unchanged since the first introduction of this section of the survey in 2019. It is important to note that responses given here will necessarily be from the individual practitioners' perspective—and so may not directly align with the actual organization priorities.

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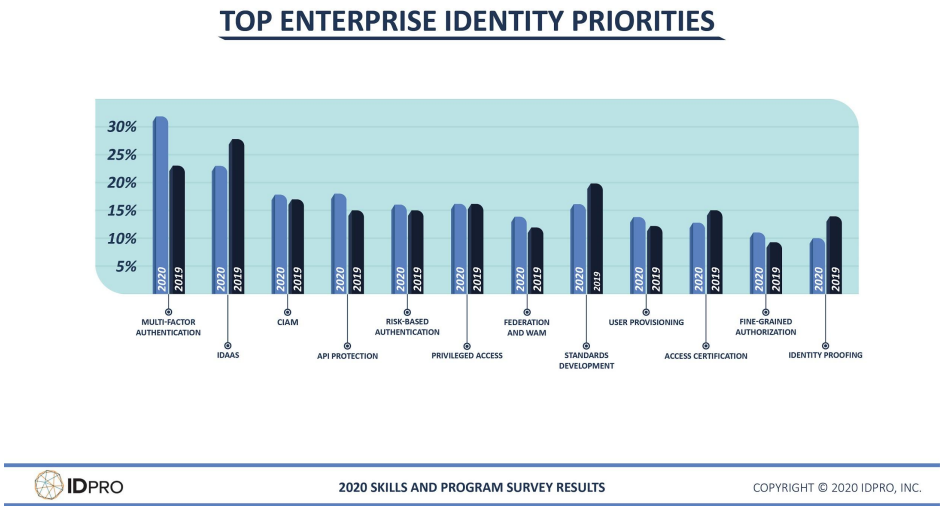
Responses and Observations



The most evident changes relative to 2019 are in Standards Development and IDaaS, and MFA.

Standards Development and IDaaS have both decreased in perceived importance to the enterprise. This might reflect the cyclical nature of the standards development process, and—in the case of IDaaS solutions—the growing maturity of the market. These observations, though, should be tempered by an understanding of the overall demographic of respondents.

MFA has become a significant enterprise priority relative to last year, and practitioners anticipate that an increasing number of deployments will occur in the next 12-18 months. This is perhaps a result of a confluence of factors: maturity of technology, importance of cyber-security, and an increase in remote/home working.

Individual Priorities

Survey Question

As an individual practitioner, what are the top identity-related areas that you are interested in learning about in the next 18 months? (Choose no more than 3)

Potential Responses

- Access Certification
- API Protection
- Becoming a mentor
- Blockchain (or similar) Identity

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- Consortia-based Identity
- Contextual/Risk-based Authentication
- Customer/Citizen Identity and Access Management
- Directory Services including Active Directory
- Fine-grained Authorization and/or Attribute-based Access Control
- IDaaS; Cloud Identity Management
- Identity for IoT and Connected Devices
- Identity Proofing/Vetting
- Identity Standards Development
- Mobile Identity Management
- Multi-factor/Strong Authentication
- Privacy-related Applications of Identity
- Privileged Access
- Receiving mentorship
- Role Management and/or Role-based Access Control
- Security Applications of Identity
- Self-sovereign or user-centric identity
- User provisioning and Lifecycle Management
- Web Access Management and/or Federation

Question Commentary

The list of potential responses is unchanged from 2019. However, the number of permitted responses was reduced to 3 (from 5 in 2019). This allows for more meaningful comparison and analysis of the 'enterprise' and 'individual' priorities.

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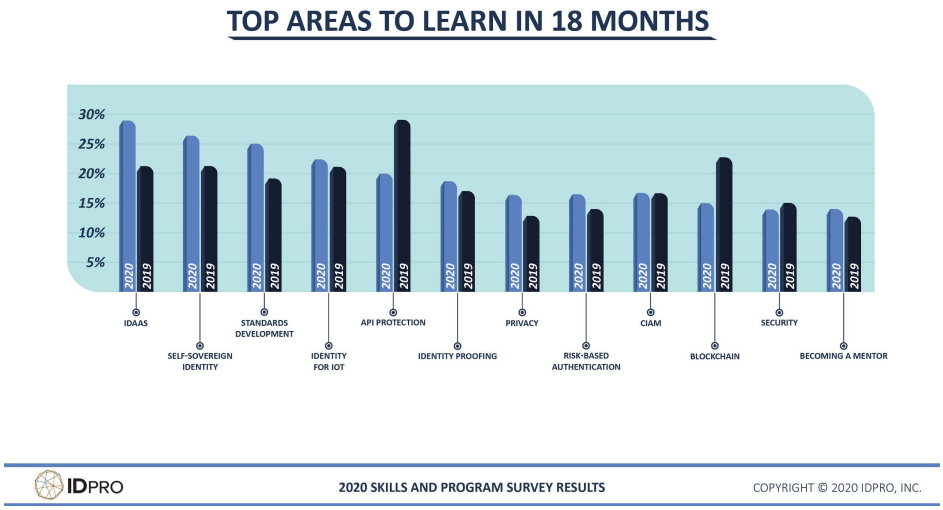
Responses and Observations



Interest in API protection and Blockchain have dropped significantly since last year, but we see notable increased interest in IDaaS, Self-sovereign Identity and Standards Development.

API protection has likely decreased either because deployments are now well in hand; or because responsibility for API protection is migrating to roles outside of the immediate Identity area (corporate IT/Security, for instance).

The contrast between the enterprise and individual interest in IDaaS perhaps arises because IDaaS is not seen as a strategic imperative, but rather as simply an operational norm – in other words, the market has matured to such an extent that most identity deployments are wholly, or at least significantly, cloud service based. It will therefore continue to be an individual priority—professionals need to understand how to deploy, configure, architect and manage solutions—but will cease to be an enterprise priority: there's no strategic choice left to be made.

Perhaps the most interesting point to note here is the shift from the specific technology of "blockchain" to the more generic principle of "self-sovereign identity". It is increasingly apparent that whilst blockchain *per se* may not be the right solution for identity projects, there is significant momentum (across several industries) towards greater individual control over personal data. Whilst "blockchain" and "self-sovereign" were, for some time, quasi-synonymous, the industry—vendors and standards groups alike—are now exploring several different technical approaches with the same aim.

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Survey Data

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