

451 Research's

2022 Research Agenda

Key topics, coverage and planned deliverables



451 Research

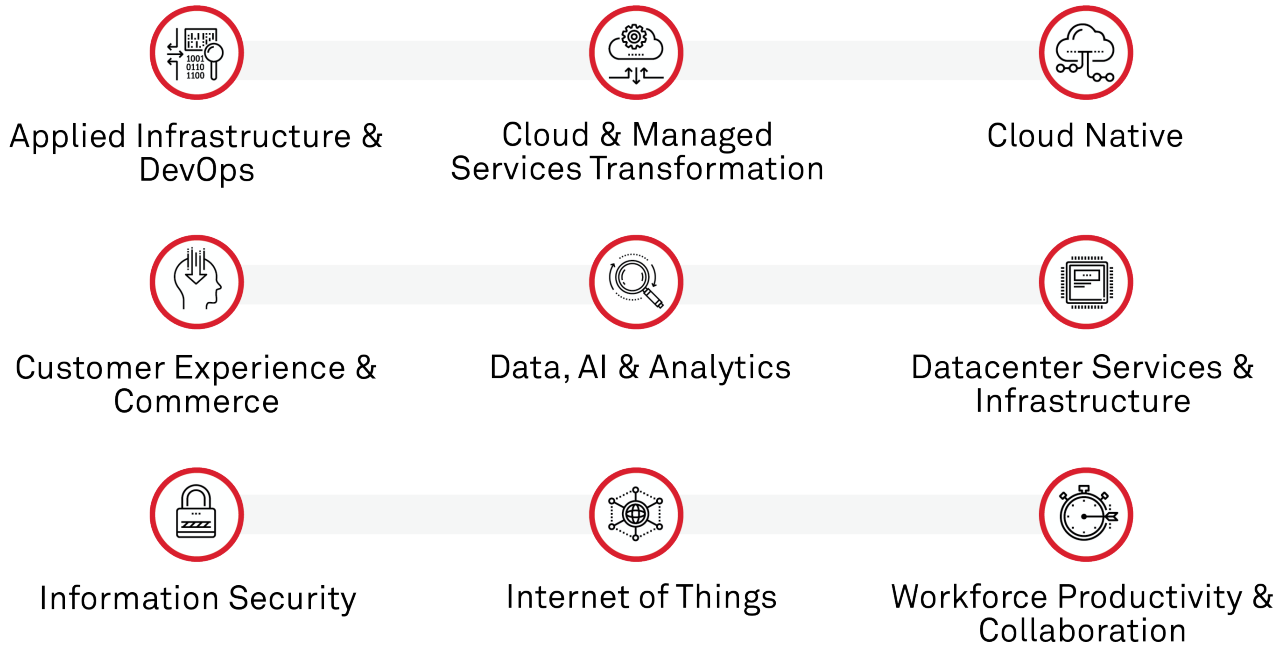
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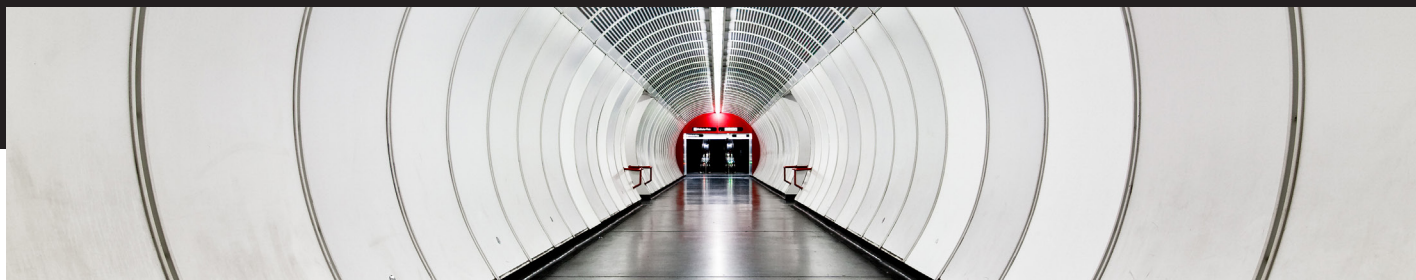
451 Research, a technology research group within S&P Global Market Intelligence, provides a holistic view of innovation across the entire enterprise IT landscape through a combination of expert analyst insight, backed by differentiated data. Our analysts interact with key industry decision-makers every day to deliver the essential intelligence necessary to understand the pivotal role that digital transformation is playing in reshaping our world.

Our research spans nine channels that align with the prevailing issues driving IT innovation, helping clients implement, invent and invest in digital transformation. The research agenda for each channel outlines key topics, analyst coverage and planned deliverables to support our clients' critical business decisions. The pace and extent of this transformation means that many trends span multiple channels; our research approach encourages analyst collaboration both within and between channels, allowing us to surface emerging trends before anyone else. Additionally, for a higher-level perspective on the key trends that will drive digital transformation in 2022 at a strategic level, please refer to our latest [Big Picture report](#).



Information Security

Information security has always been a high priority for organizations. From the evolution of IT and cloud-native technology to the continued advancement of AI/ML and the increased adoption of managed and professional services, we see the priority of information security reflected again and again across multiple aspects of 451 Research insights. In 2022, cybersecurity assumes even greater proportions. The scope of risk has expanded, with numerous high-profile ransomware attacks and other threats already evident in the IT supply chain. Cybersecurity is also a significant factor in international relations on many fronts. 451 Research plans to track the evolution of technologies and services that enhance resilience, threat detection and incident response across a hugely diverse and growing attack surface.



Analysts



Scott Crawford
Research Director, Security

[BIO >](#)



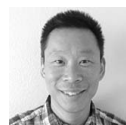
Daniel Kennedy
Principal Research Analyst

[BIO >](#)



Paige Bartley
Senior Research Analyst

[BIO >](#)



Justin Lam
Research Analyst

[BIO >](#)



Garrett Bekker
Principal Research Analyst

[BIO >](#)



Jackie McGuire
Research Analyst

[BIO >](#)



Megan Goodwin
Research Analyst

[BIO >](#)



John McNeice
Research Analyst

[BIO >](#)



Eric Hanselman
Principal Research Analyst

[BIO >](#)

Key Research Topics and Themes for 2022

● **A new architecture for security operations**

With the rise of a host of technologies extending threat detection and response across multiple sources of telemetry, approaches to security analytics, operations and response are being challenged. Anchors in security information and event management (SIEM), security orchestration, automation and response (SOAR) and threat intelligence face disruption from the rise of new approaches to threat detection and response (TDR) and the emergence of new segments in 'outside-in' visibility that give defenders a better grasp of the attacker's view of targets. We explore how new approaches to security operations (SecOps) technologies are being forged by these transformations.

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● **IAM evolves to meet emerging needs and new demands**

Identity and access management (IAM) remains the front line of defense for hardening resilience against cyber exploits. Trends from an explosion in online users requiring more scalable and usable approaches in realms such as consumer IAM (CIAM) to cloud identity entitlements management (CIEM) to advances in 'zero trust' access and greater refinement of privileged access management (PAM) are reshaping the nature of IAM for 2022 and beyond.

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● **The ascendancy of data security, privacy and governance**

The focus on data as a central organizational asset has brought about a multifaceted approach to governance and risk management in disciplines of security, identity and privacy. Among the topics we see shaping our coverage are technologies addressing key management, post-quantum security, encryption in use, the developer experience and the application of AI/ML in implementing and assuring these priorities.

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● **Cloud security: specialization or convergence?**

The definition of products and services in cloud security has largely proceeded along two parallel lines: those integrated natively into cloud provider platforms, and those offered by third parties either as emerging techniques or to satisfy multicloud priorities or other requirements that cloud providers themselves may not address. More than a few tools in the latter category are exhibiting their usefulness in a variety of use cases. But are these cases necessarily separate segments of the market? Or do they represent a convergence of functionality in tools and vendors that can span multiple segments and broaden opportunities for vendors and their customers alike? If the latter is true, how can that convergence be described in ways that help the industry rather than muddy the waters?

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● **DevSecOps, 'shift left' and the evolution of application protection**

The move toward greater integration of security into developer pipelines continues to advance, as developers and security teams approach parity in the use of application security tools (AST). The integration of security testing into continuous integration and code construction becomes a factor as organizations seek to coordinate their preferred tools to the needs of their specific enterprises.

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CONTACTS

The Americas
+1 877 863 1306
market.intelligence@spglobal.com

Europe, Middle East & Africa
+44 20 7176 1234
market.intelligence@spglobal.com

Asia-Pacific
+852 2533 3565
market.intelligence@spglobal.com

www.spglobal.com/451-research

www.spglobal.com/marketintelligence

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