2022 Public Sector Identity Index Report — UK Report

January 2022

Presented to:

okta | auth0

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Methodology

Market Connections and Auth0 partnered to design an online survey of 850 IT and line of business decision makers within national and state/local governments in the US (200 federal, 200 state & local), UK (100 federal, 100 state & local), and Australia/New Zealand (155 federal/national, 95 state & local) , fielded in September - October 2021.

PRIMARY OBJECTIVES:

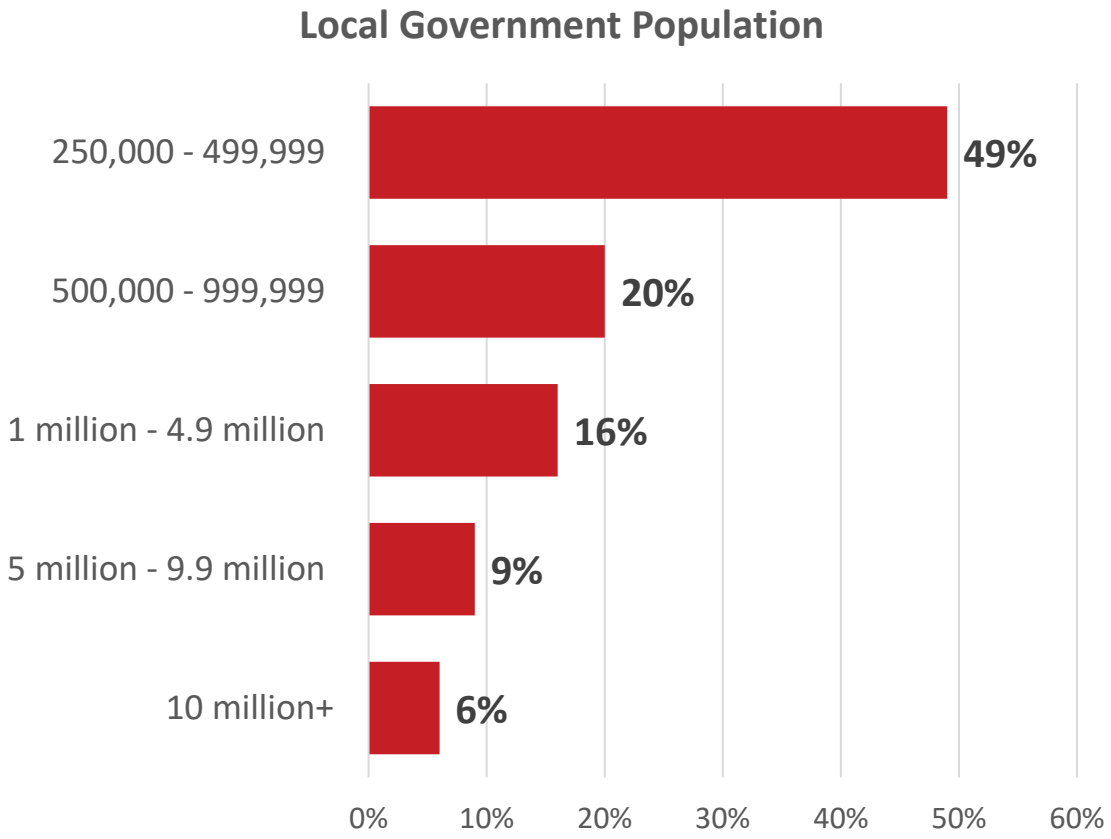
To identify and quantify:

- The current state of identify authentication and security
- Challenges to current implementation
- Current pain points
- Plans and concerns over changing systems and processes

Respondent Classifications

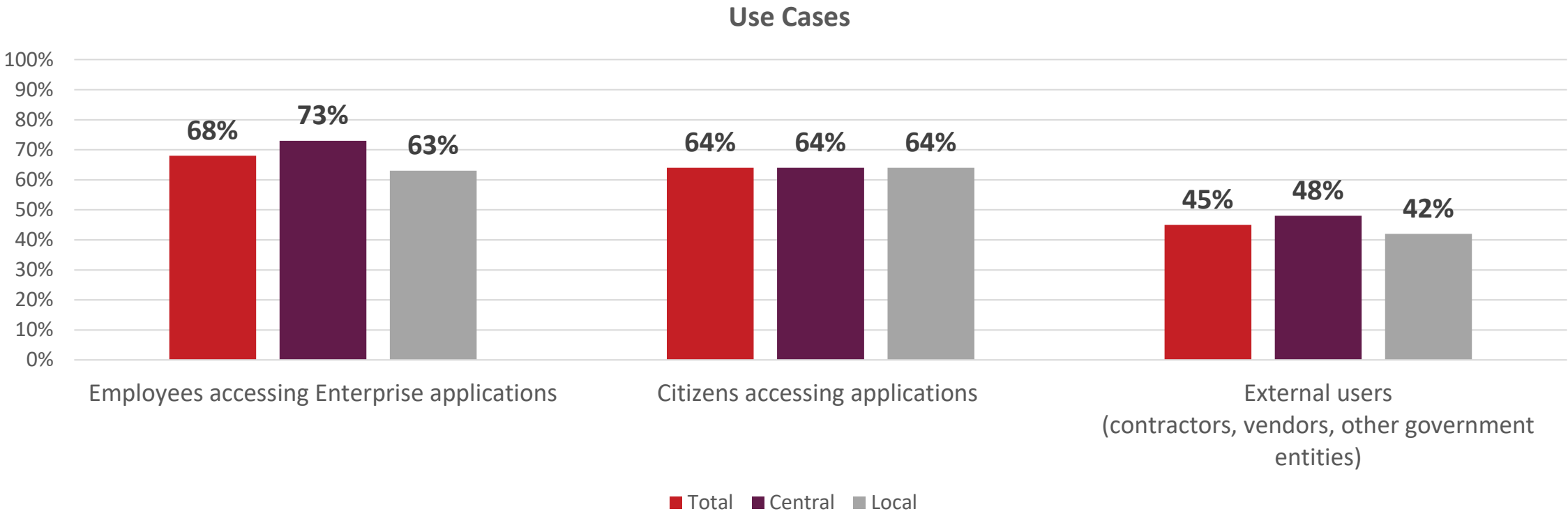
Sample Composition

	United Kingdom (UK)
Central Government	**100**
Local Government (population 250,000+)	**100**



Respondent Classifications

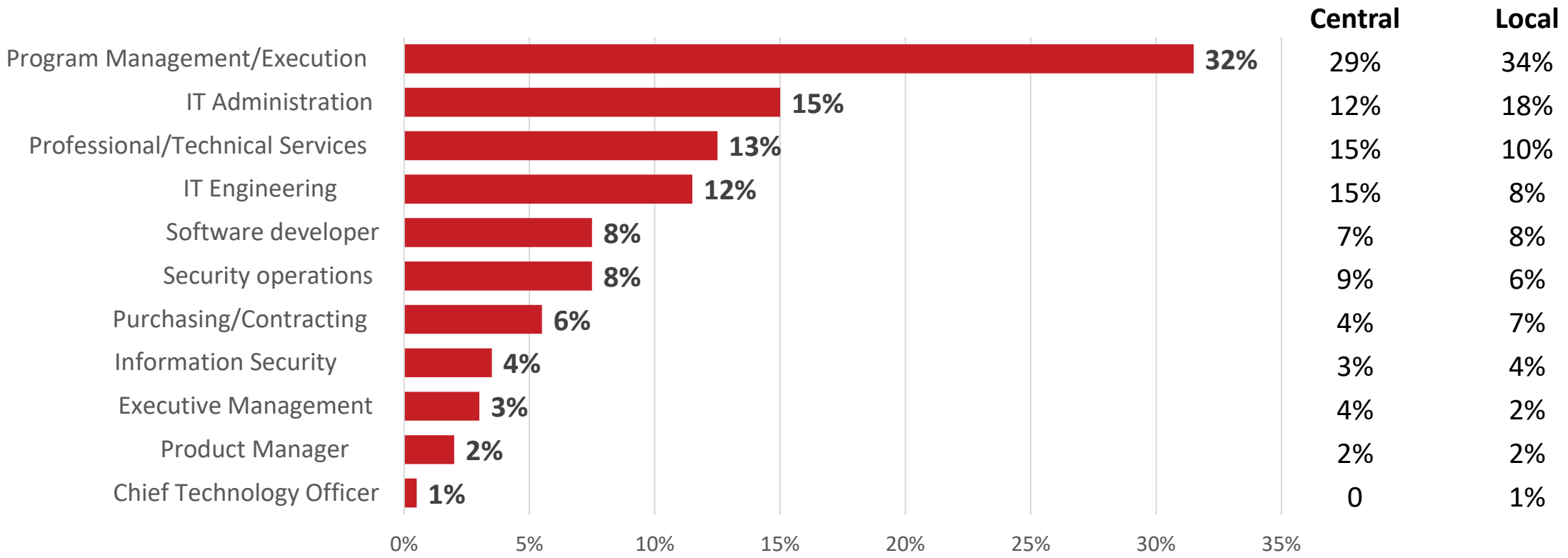
The most frequently cited use case was employees accessing Enterprise applications, but two-thirds also cited residents/citizens accessing applications and nearly half cited external users.



Which of the following use cases are most applicable to your role

Respondent Classifications – Job Role

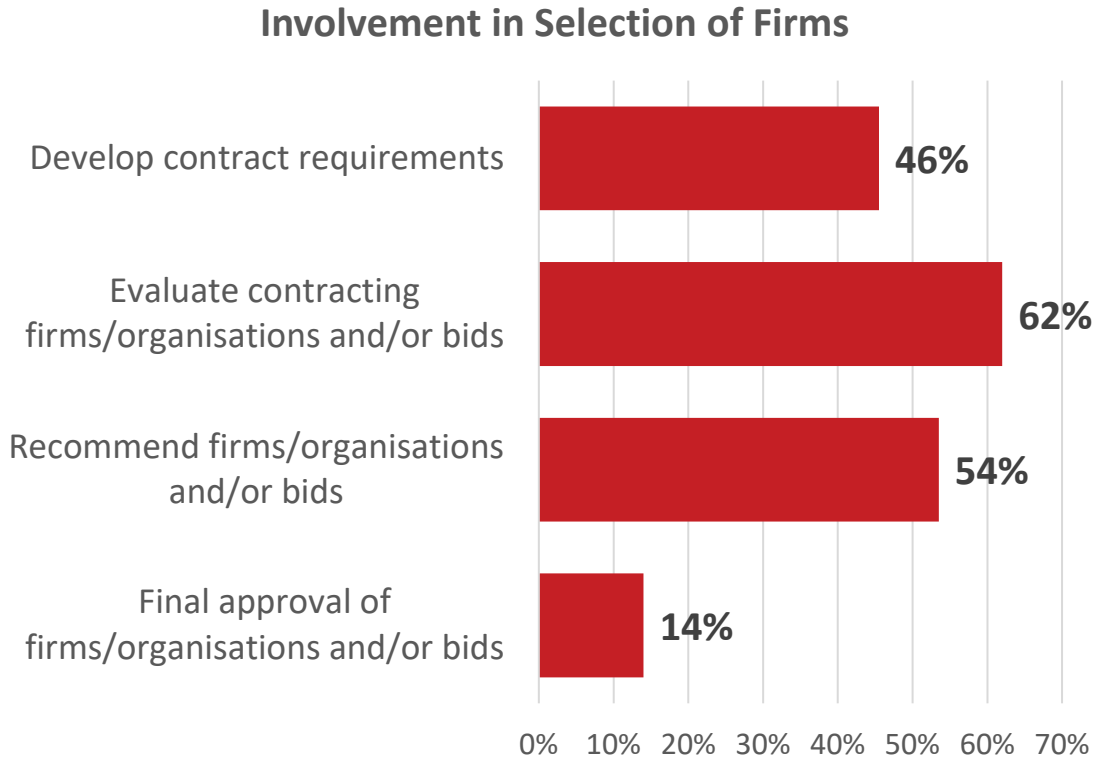
Most respondents were either in program management/execution or IT administration.

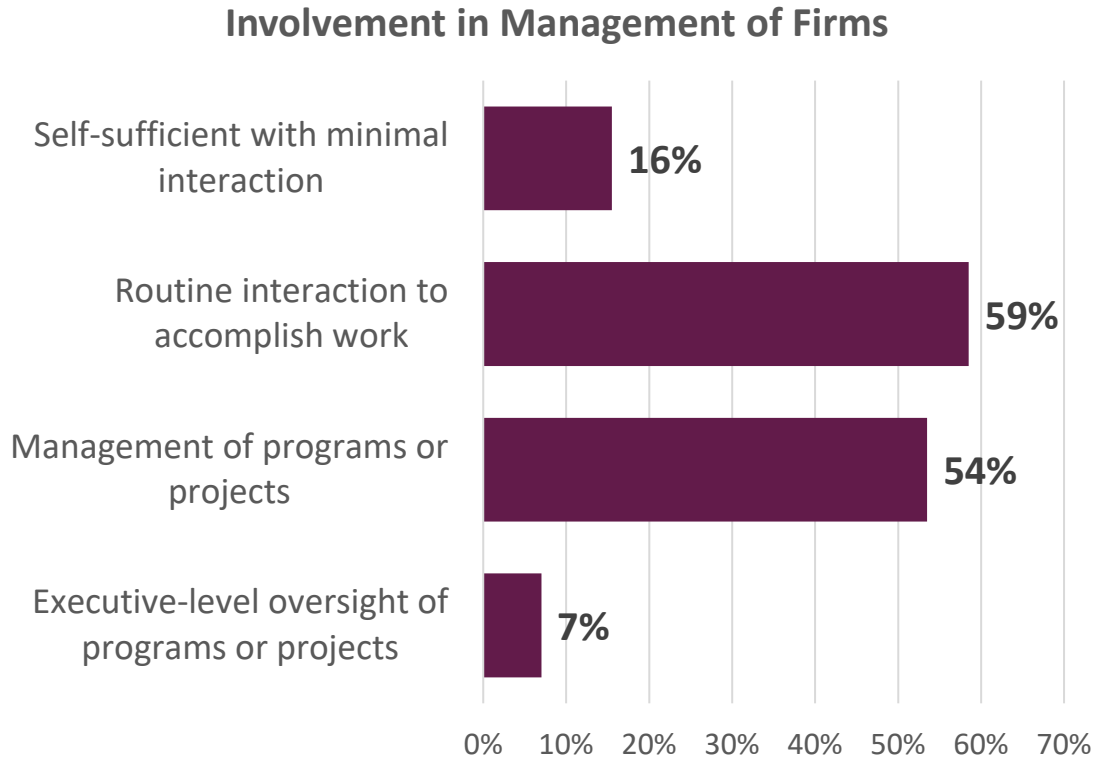


Which of the following best describes your role in your organization?

Respondent Classifications

Respondents were screened to ensure they were involved in either their organization's selection of or management of firms that provide Identity and Access Management (IAM).



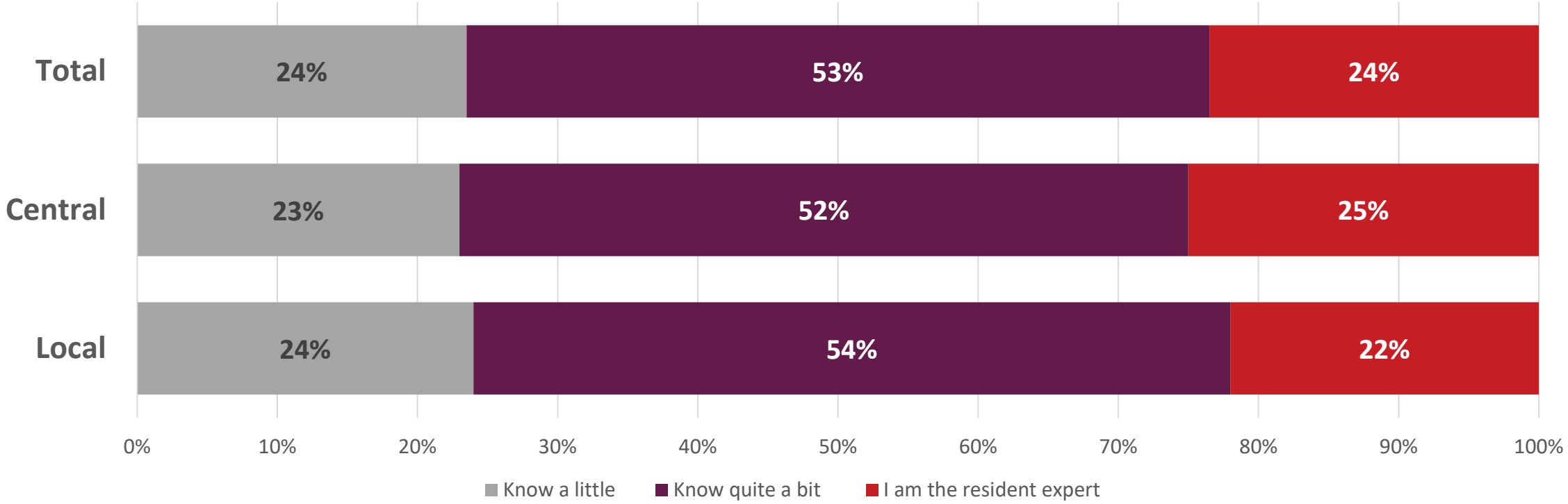


In which of the following ways are you or have you been involved in your [organization's/organisation's] selection of firms that provide Identity and Access Management (IAM)?

In which of the following ways are you or have you been involved in your [organization's/organisation's] management of these firms once they have been hired or selected?

Respondent Classifications – IAM Knowledge

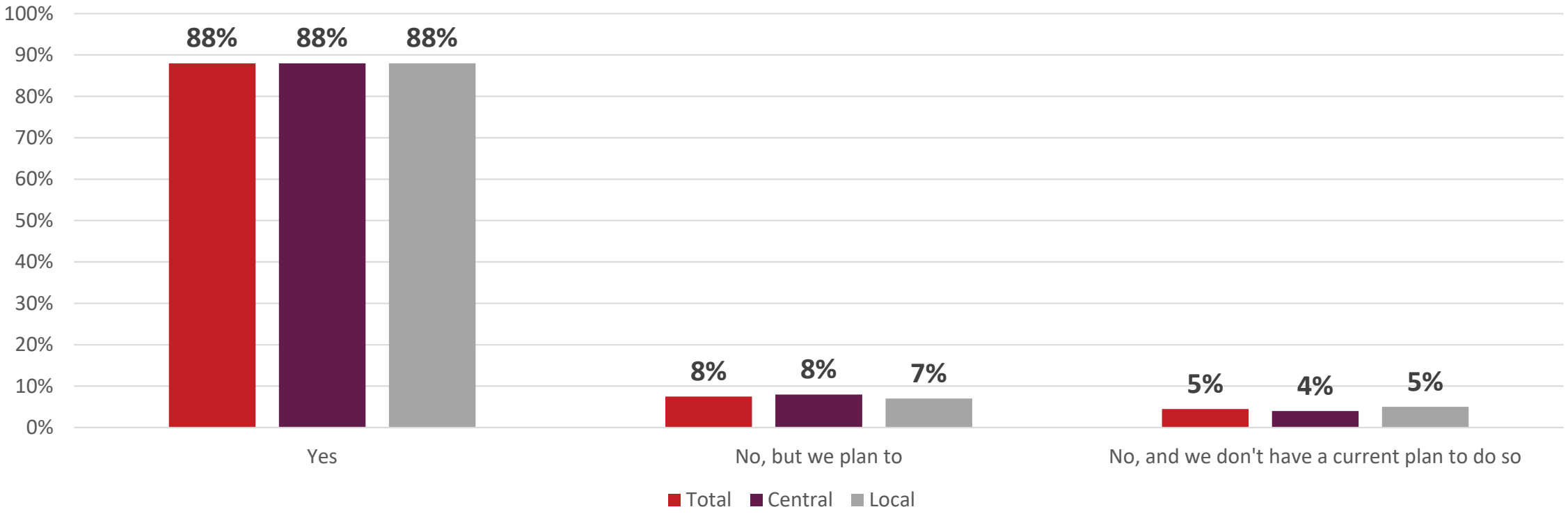
Respondents were screened to ensure they knew at least a little about their organization's processes around IAM; more than three-quarters know quite a bit or are the resident expert in their organization.



How would you describe your knowledge of your organization's processes around Identity and Access Management (IAM)?

Organization Currently Builds External-Facing Applications

The overwhelming majority currently build external-facing applications.

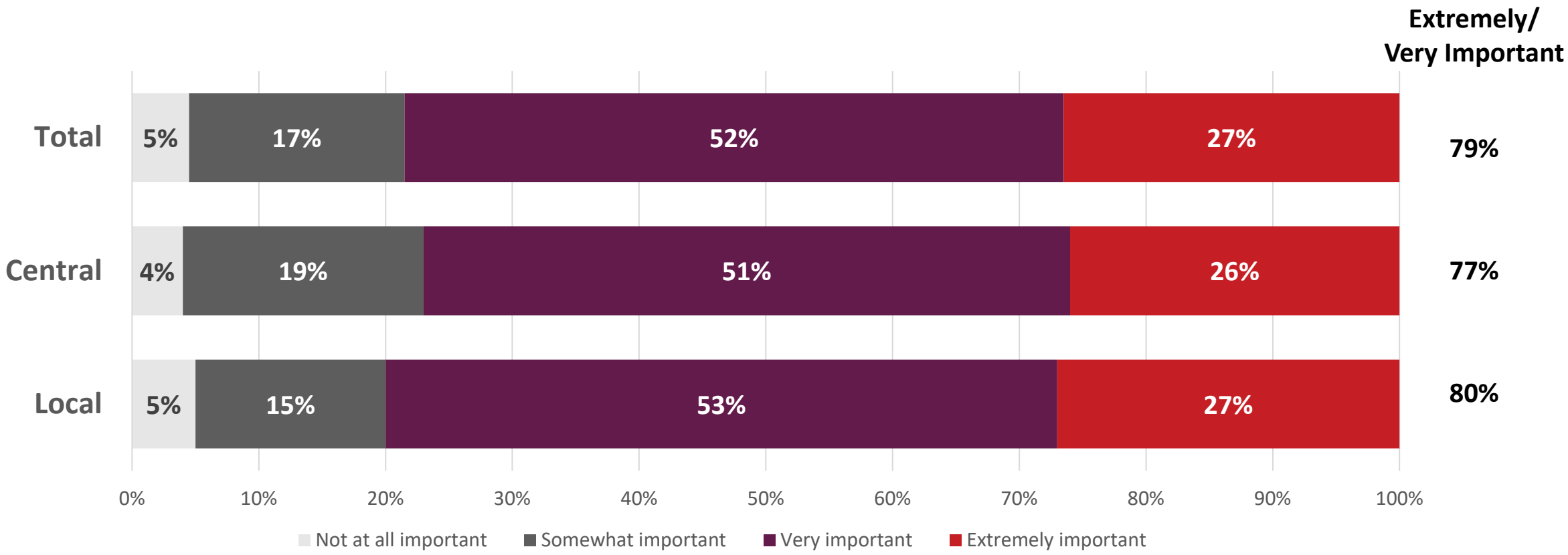


Does your [organization/organisation] currently build external-facing applications?

Digital Services Landscape

Importance of Providing Digital Applications/Services

Across the board providing digital applications/services to citizens is seen as important.



How important is it that your organization has the ability to provide digital applications or services for citizens?

Importance of Providing Digital Applications/Services - Examples

Not at all important

> Applications for internal use only
>
> CENTRAL GOVERNMENT

> Interaction with public is usually very limited
>
> LOCAL GOVERNMENT

> Not exposed to external users
>
> LOCAL GOVERNMENT

Extremely important

> Critically important in ensuring continuous access to our services to citizens
>
> CENTRAL GOVERNMENT

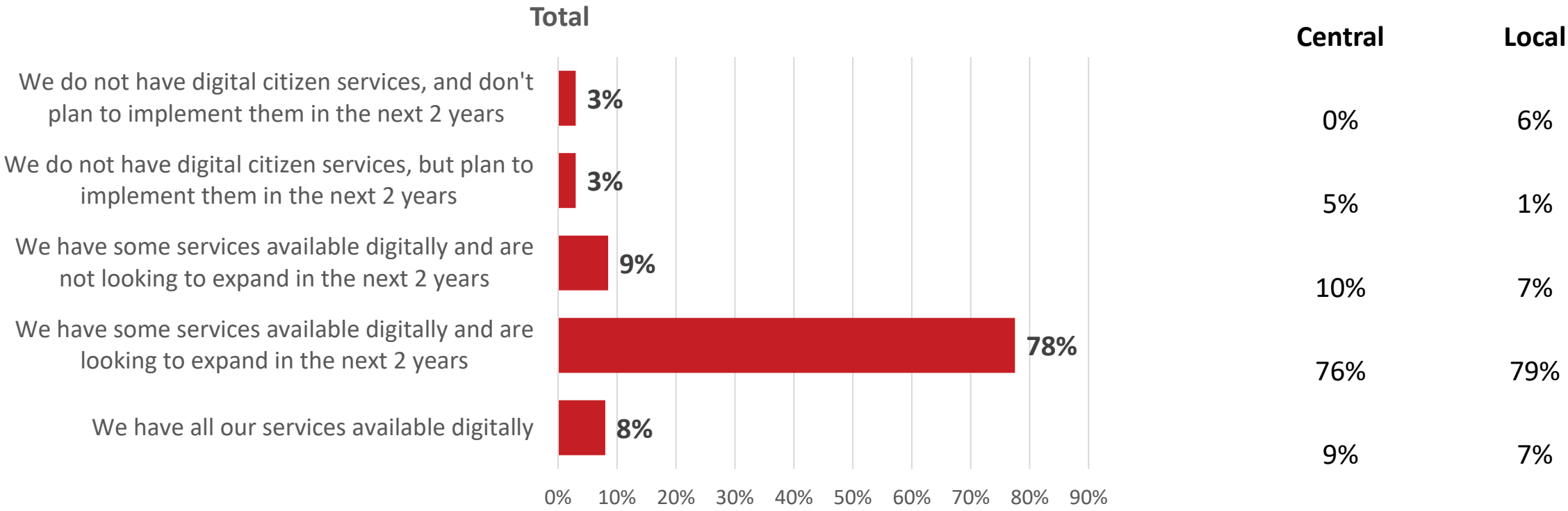
> Continuing to build on the digital programmes we've created so that we can carry on enabling digitization
>
> LOCAL GOVERNMENT

> Improving the way we manage and share public data has the potential to deliver significant efficiency and gains right across the economy.
>
> CENTRAL GOVERNMENT

Why is it [ANSWER] that your organization has the ability to provide digital citizen services? Please be as specific and detailed as possible

Current State of Digitizing Citizen Services

More than three-quarters have at least some services digitally and are looking to expand in the next 2 years.

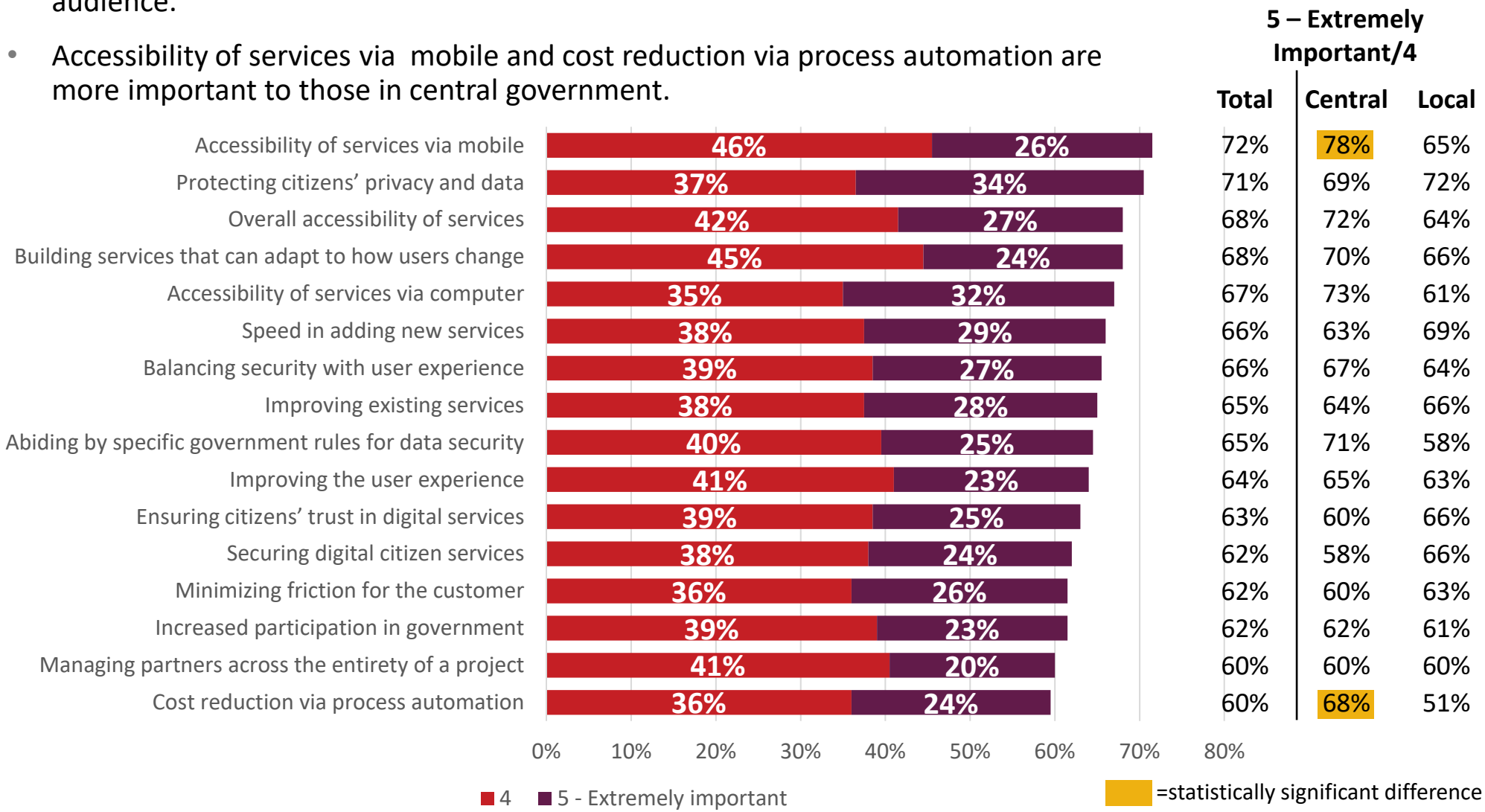


	Central	Local
We do not have digital citizen services, and don't plan to implement them in the next 2 years	0%	6%
We do not have digital citizen services, but plan to implement them in the next 2 years	5%	1%
We have some services available digitally and are not looking to expand in the next 2 years	10%	7%
We have some services available digitally and are looking to expand in the next 2 years	76%	79%
We have all our services available digitally	9%	7%

Currently, where is your organization in terms of digitizing its citizen services?

Importance When Thinking About Citizen Services

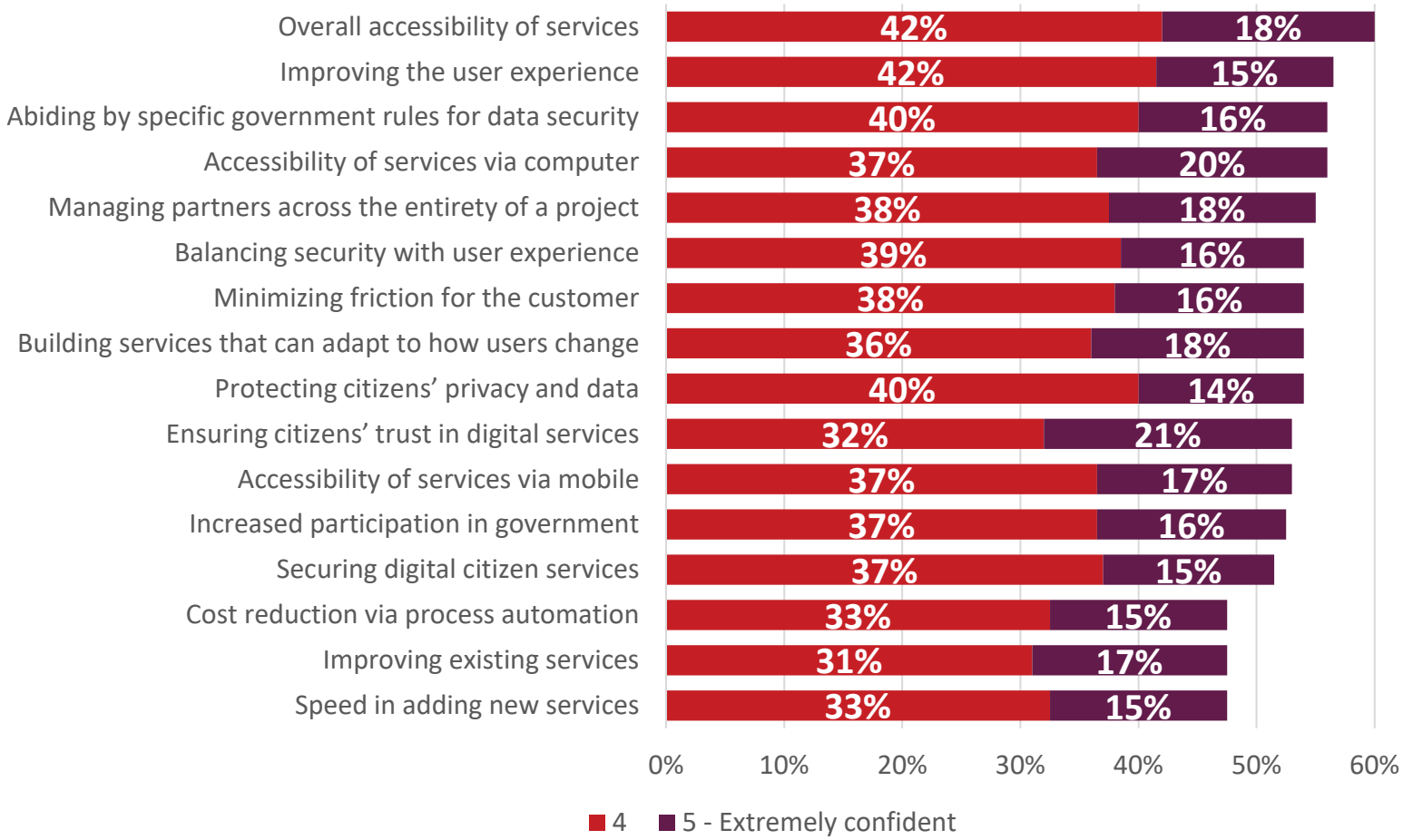
- Accessibility of services via mobile and protecting citizens' privacy and data are the most important to this audience.
- Accessibility of services via mobile and cost reduction via process automation are more important to those in central government.



How important are each of the following to your ${custom25} when thinking about its citizen services?

Confidence in Delivering

- These respondents are the most confidence in their ability to deliver on overall accessibility of services and improving the user experience.
- There were no significant differences in confidence between central and local governments.



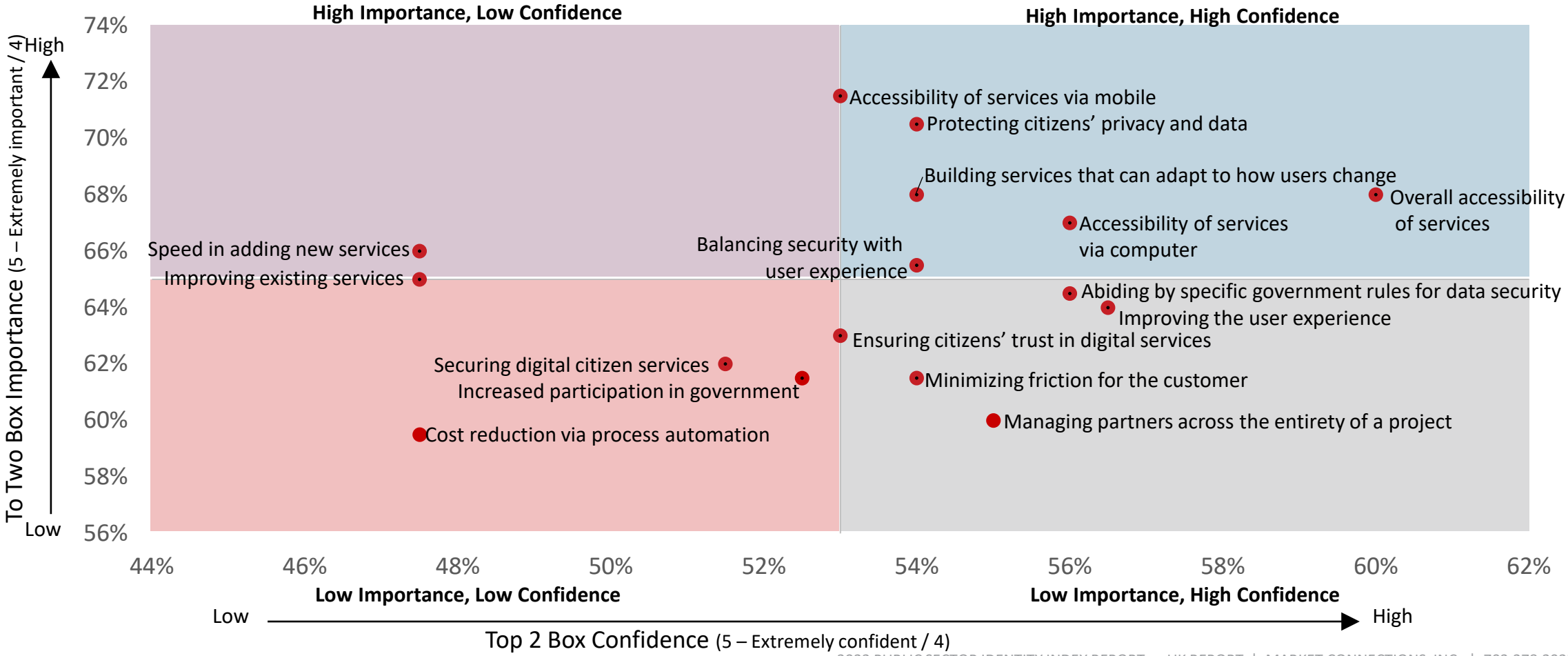
5 – Extremely Confident/4

	Total	Central	Local
Overall accessibility of services	60%	63%	57%
Improving the user experience	57%	59%	54%
Abiding by specific government rules for data security	56%	57%	55%
Accessibility of services via computer	56%	54%	58%
Managing partners across the entirety of a project	55%	60%	50%
Balancing security with user experience	54%	57%	51%
Minimizing friction for the customer	54%	51%	57%
Building services that can adapt to how users change	54%	53%	55%
Protecting citizens' privacy and data	54%	50%	58%
Ensuring citizens' trust in digital services	53%	49%	57%
Accessibility of services via mobile	53%	53%	53%
Increased participation in government	53%	56%	49%
Securing digital citizen services	52%	51%	52%
Cost reduction via process automation	48%	45%	50%
Improving existing services	48%	47%	48%
Speed in adding new services	48%	43%	52%

How confident are you in your [organization's/organisation's] current ability to deliver on each of the following aspects of citizen services?

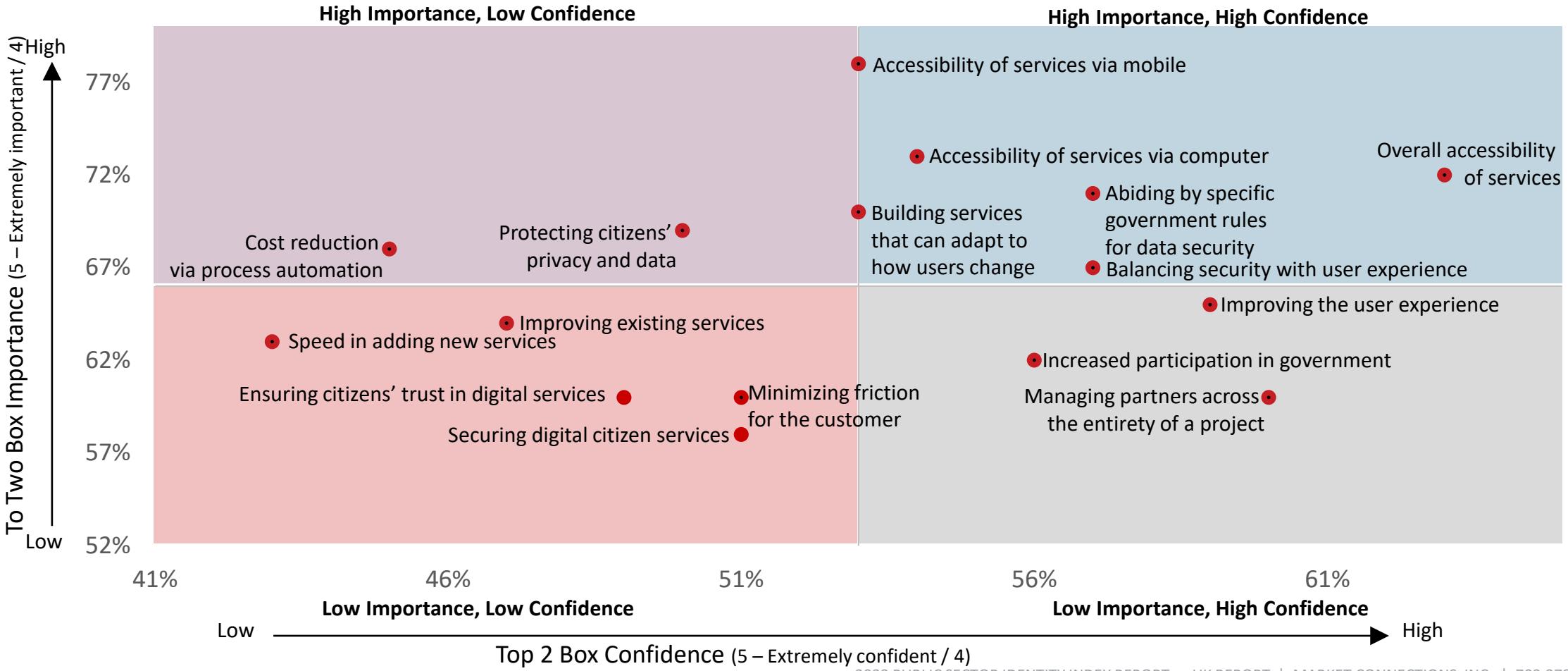
Importance/Confidence: Total

In the UK, these respondents have key perceived weaknesses in accessibility of services via mobile, speed in adding new services and improving existing services.



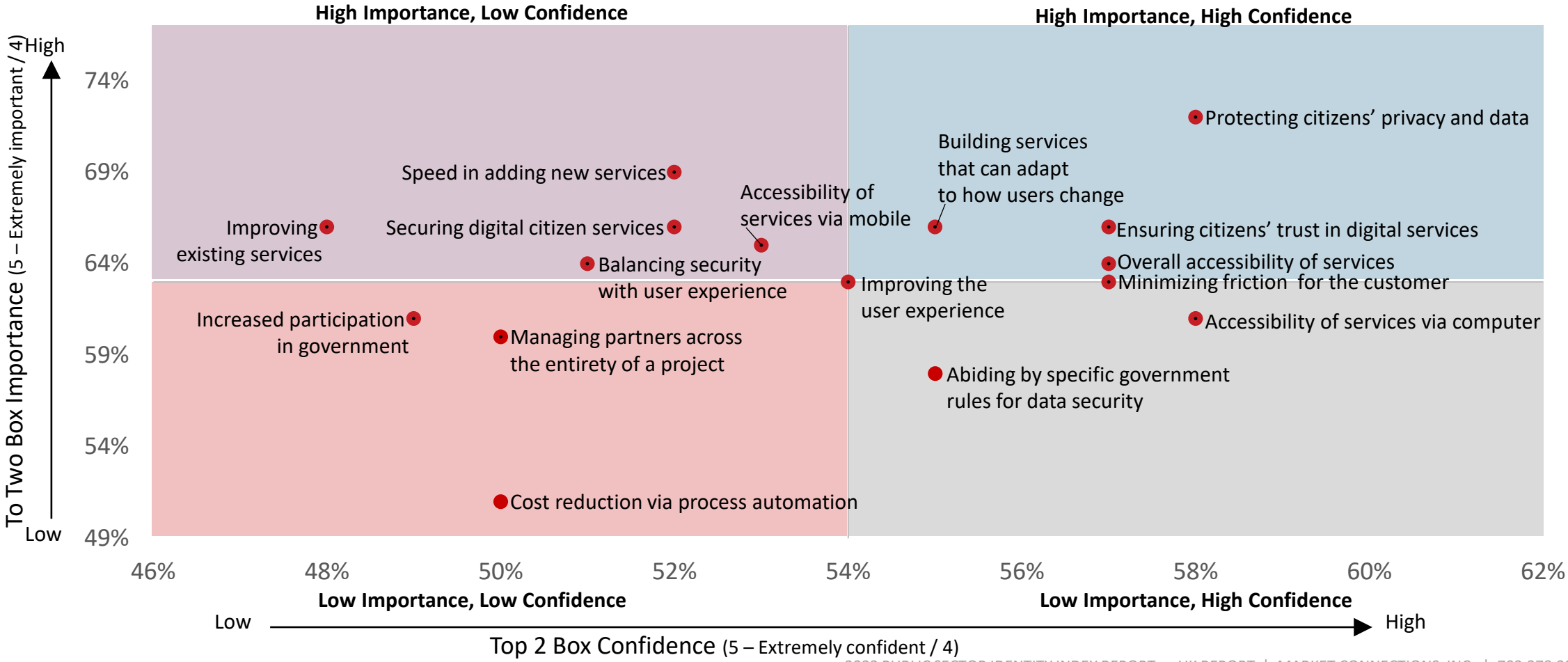
Importance/Confidence: Central

Central government respondents have key perceived weaknesses in cost reduction via process automation, protecting citizens' privacy and data, building services that can adapt to how users change and accessibility of services via mobile.



Importance/Confidence: Local

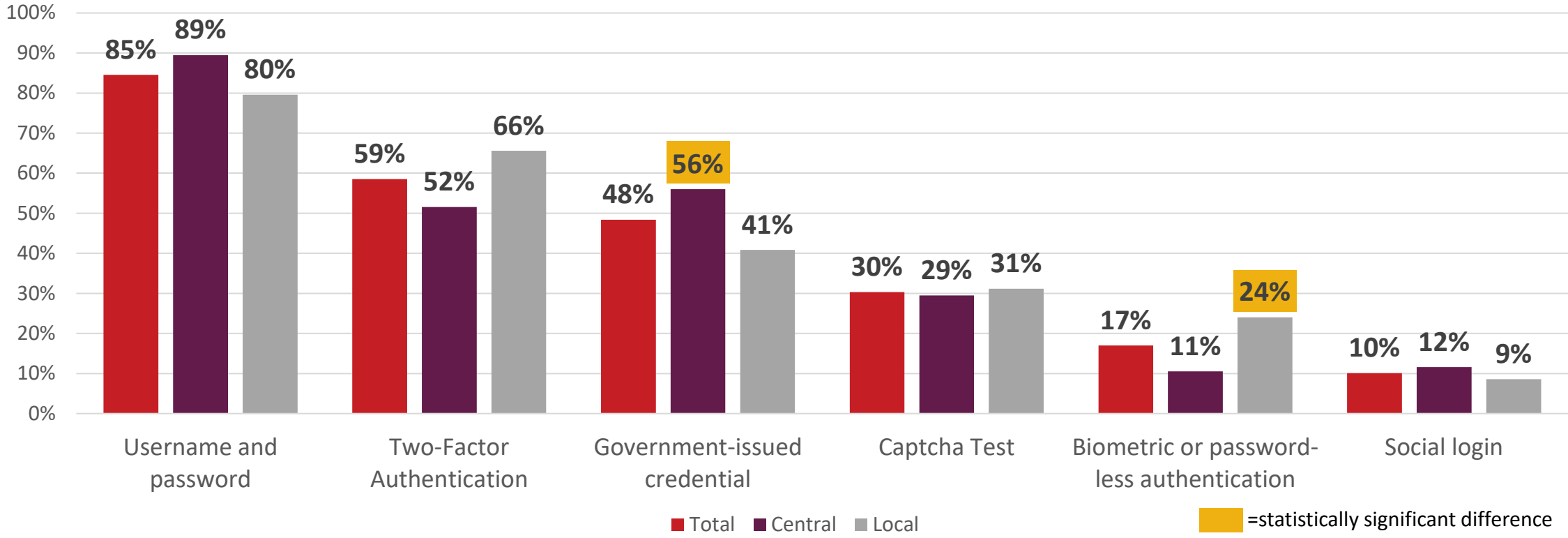
Local respondents have several perceived weaknesses, including accessibility of services via mobile, balancing security with user experience, securing digital citizen services, speed in adding new services and improving existing services.



Authentication Landscape

Current Authentication Methods Used by Citizens

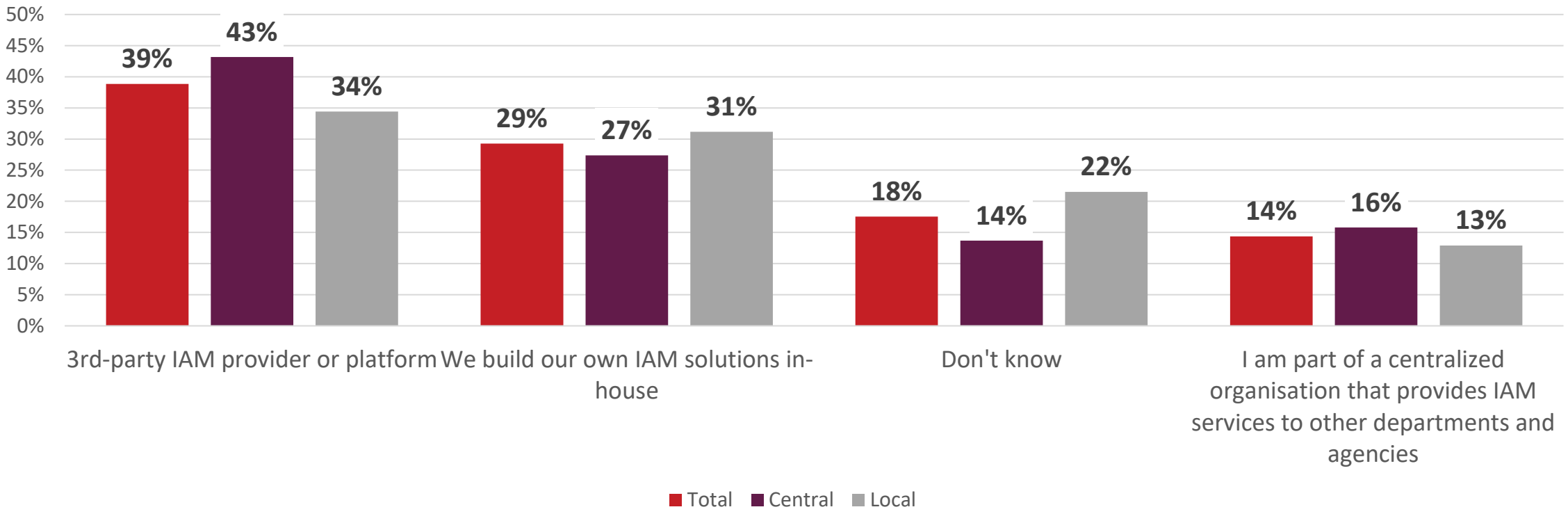
- Overall, username and password is the most frequently used, following by two-factor authentication.
- Those in central government are more likely to say citizens are using government-issued credentials, while those in local government are more likely to say citizens are using biometric or password-less authentication.



Which authentication method are citizens currently using to access your digital applications or services? Select all that apply

Current Providers of IAM

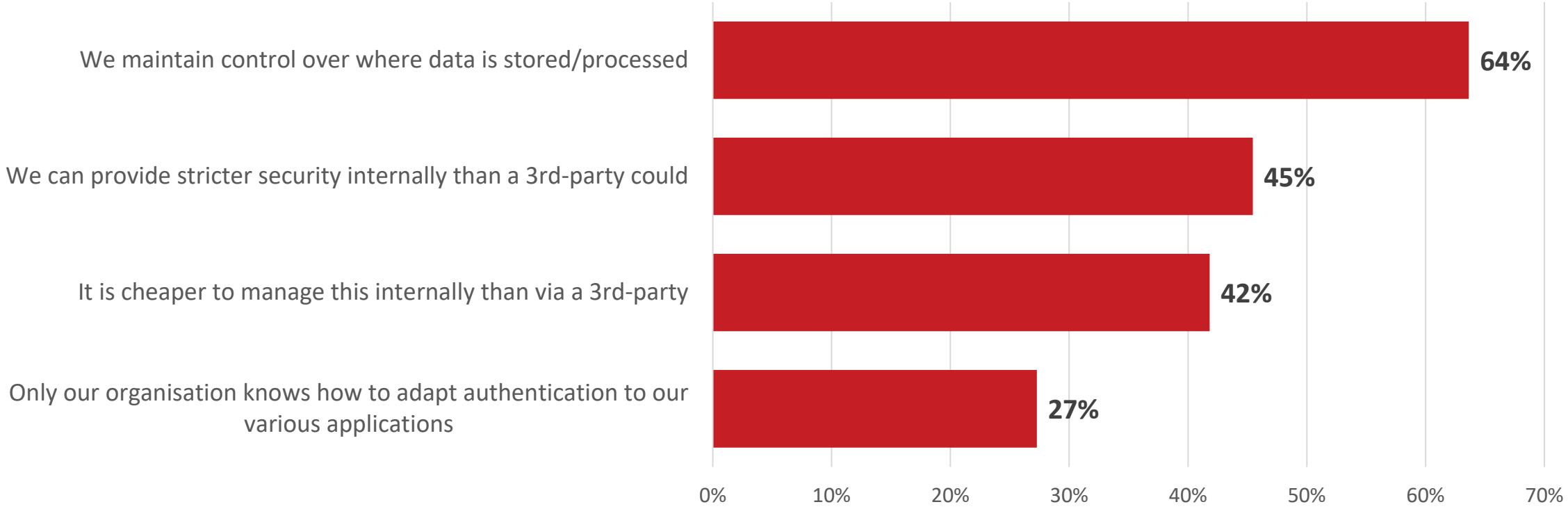
Four in ten currently use a 3rd-party IAM provider or platform, while three in ten build their own IAM solutions in-house.



Who currently provides Identity and Access Management (IAM) services for your [organization's/organisation's]?

Benefits in Building IAM In-House

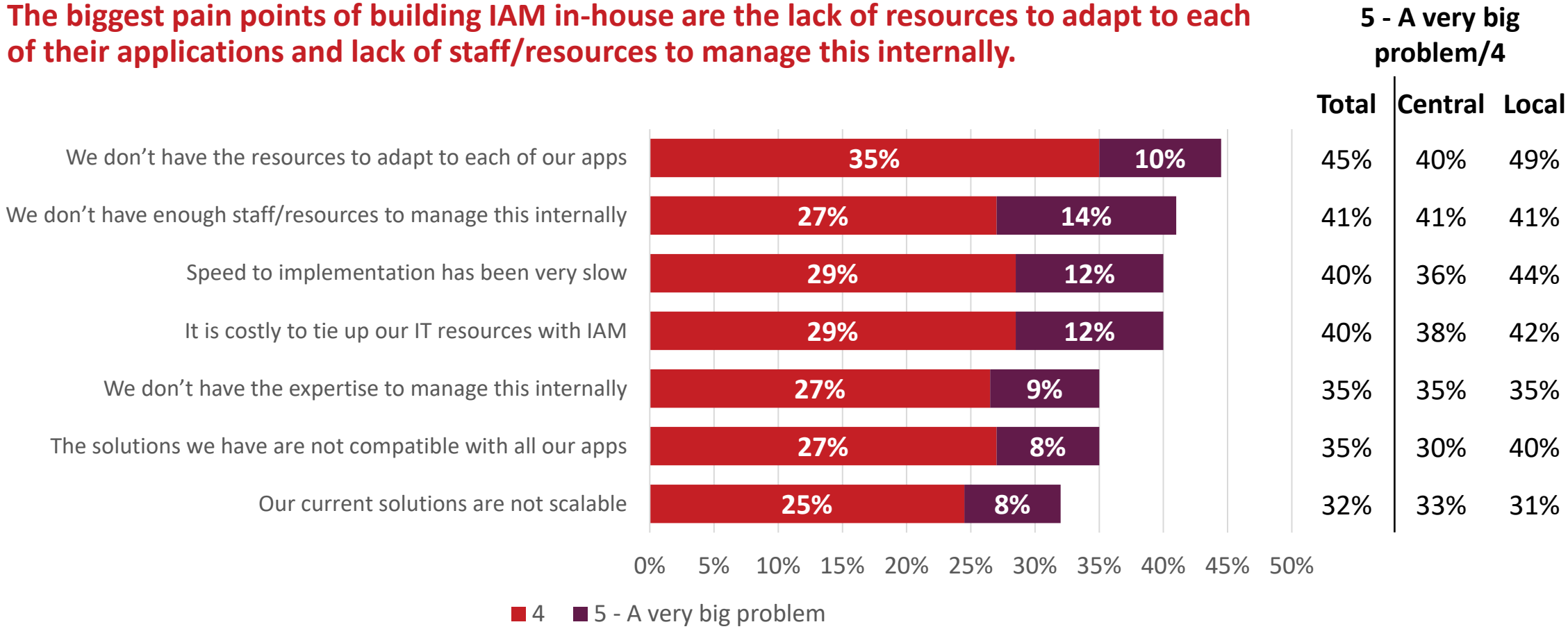
The biggest benefits for those who build IAM in-house are seen as maintaining control over data, providing stricter security than a 3rd-party could, and cost savings managing IAM internally.



How much of a problem are each of these potential pain points in building Identity and Access Management (IAM) in-house for your [organization/organisation]?

Pain Points in Building IAM In-House

The biggest pain points of building IAM in-house are the lack of resources to adapt to each of their applications and lack of staff/resources to manage this internally.

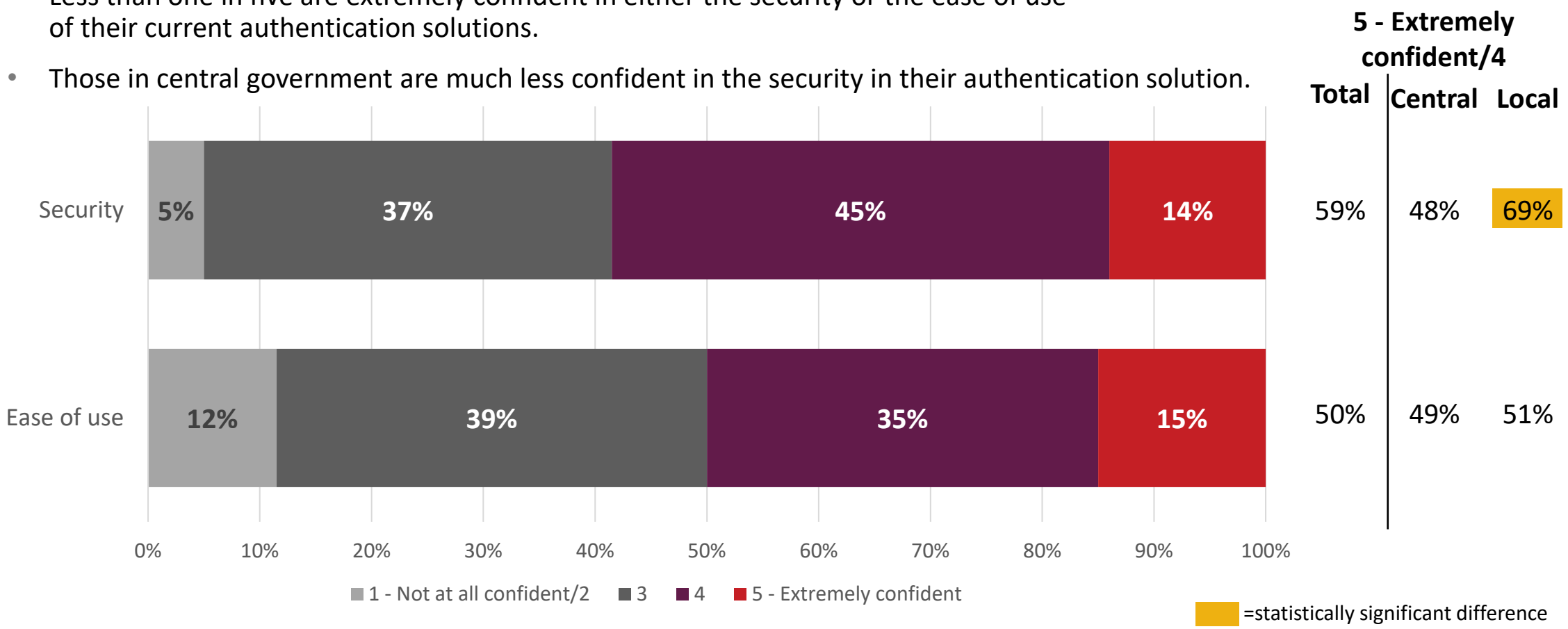


5 - A very big problem/4	Total	Central	Local
We don't have the resources to adapt to each of our apps	45%	40%	49%
We don't have enough staff/resources to manage this internally	41%	41%	41%
Speed to implementation has been very slow	40%	36%	44%
It is costly to tie up our IT resources with IAM	40%	38%	42%
We don't have the expertise to manage this internally	35%	35%	35%
The solutions we have are not compatible with all our apps	35%	30%	40%
Our current solutions are not scalable	32%	33%	31%

How much of a problem are each of these potential pain points in building Identity and Access Management (IAM) in-house for your [organization/organisation]?

Confidence Regarding Current Authentication Solution

- Less than one in five are extremely confident in either the security or the ease of use of their current authentication solutions.
- Those in central government are much less confident in the security in their authentication solution.

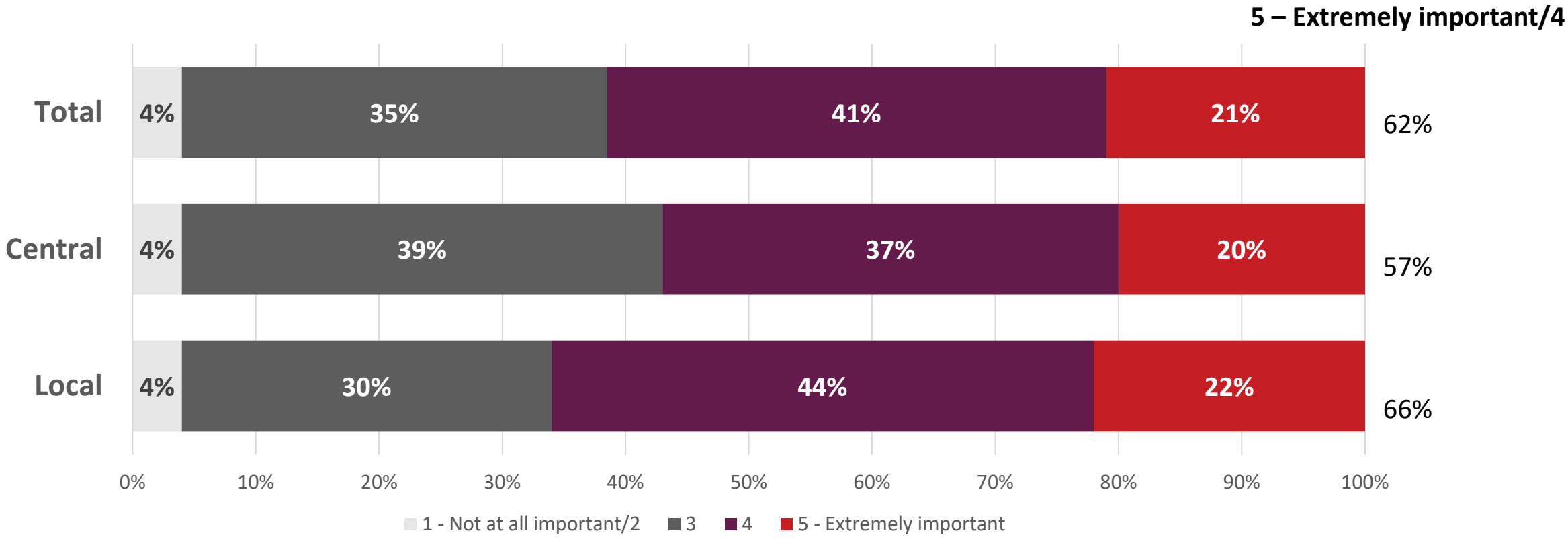


How confident are you in each of the following regarding your current authentication solution?

Single IAM System

Importance in Having One Digital Credential Across Services

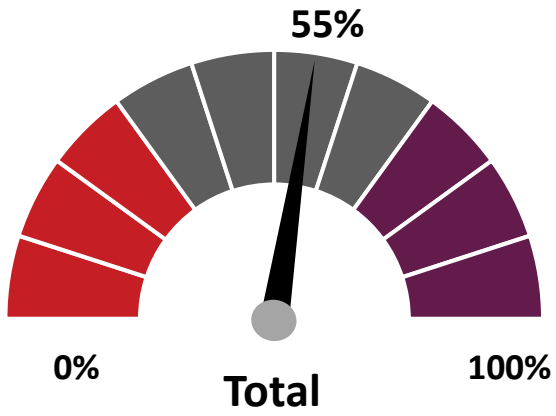
Overall, having one digital credential for authentication and authorization across all services is seen as very important across the board.

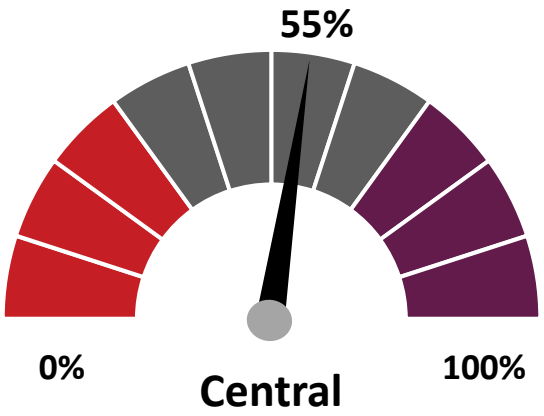


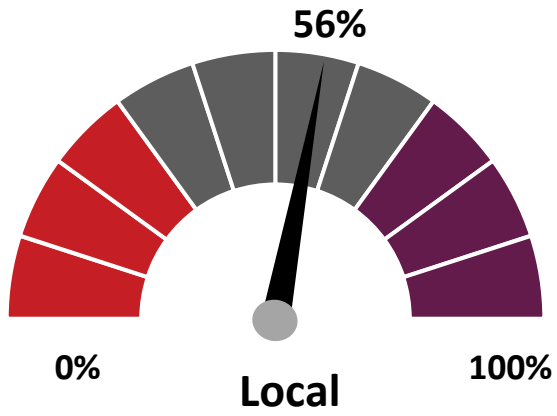
How important is it to your [organization/organisation] to have one digital credential for authentication and authorization across all your services? By this we mean enabling users to securely authenticate with multiple applications using a single set of credentials (username and password)

Percentage of Services Having a Single Digital Credential for Access

While having a single digital credential for access is seen as important, just over half of services currently have one.



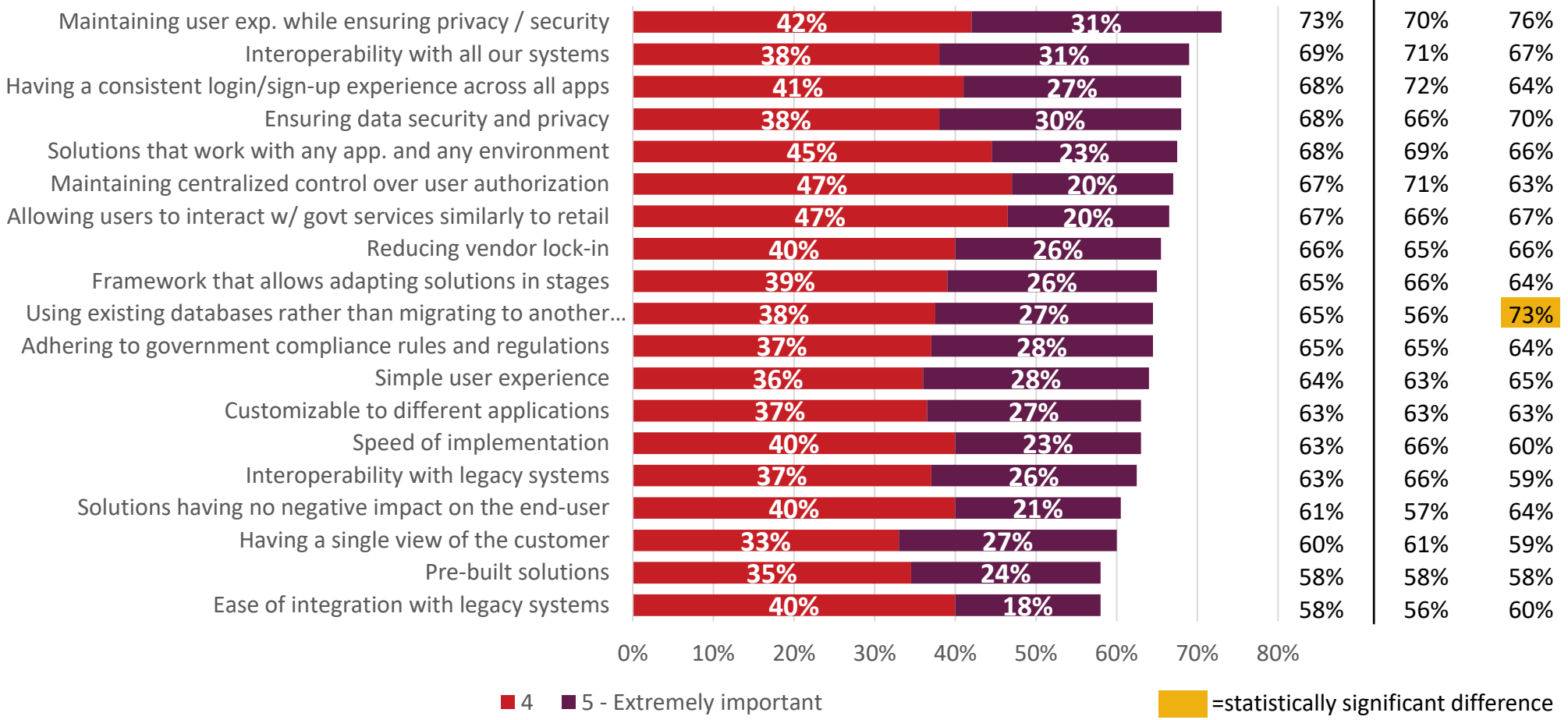




Across what percentage of your services do you currently have a single digital credential for access?

Importance of Aspects of Implementing Single IAM System

Maintaining the user experience while ensuring data privacy/security is the most important overall, followed by interoperability with all systems.



How important are each of the following when thinking about implementing/maintaining a single system for identity and access management across all your services?

Statement Agreement

In general, these respondents don't feel it's too difficult to get citizens on board or to justify the cost, it's a matter of being able to control user authorization.

	Total	Central	Local
It is imperative that my org. be able to continue to control user authorization	77%	78%	76%
Digital identity is about more than authorization and authentication	75%	69%	80%
Implementing a single service hub for identity systems will simplify work for core dev. Teams	72%	74%	69%
It is important for our devs. and engrs. to be able to implement digital identity solutions quickly	71%	76%	65%
Having a 3rd-party solution to identity authentication and security would free up internal resources	63%	56%	69%
My org. has enough internal expertise to implement/maintain single sign-on authentication	62%	56%	68%
The internal developer community should be part of the process of determining how identity authentication and security is managed, and by whom	60%	56%	63%
My org. does not currently have the time /resources to adapt a single sign-on authentication to all our apps	57%	57%	57%
Our end goal is to have a single sign-on to be able to access services from the govt at all levels	55%	56%	53%
Outsourcing identity authentication to a third-party vendor is too expensive	51%	56%	46%
It's difficult to justify the cost of having identity authentication via a 3rd party	50%	48%	51%
It is difficult to get internal stakeholders on board with single sign-on authentication	49%	52%	46%
My org. has enough manpower to implement/maintain single sign-on authentication	48%	47%	48%
It is difficult to get citizens on board with single sign-on authentication	44%	42%	45%

How much do you agree or disagree with each of the following statements when thinking about implementing/maintaining a single method of identity authentication and security across all your services?

Key Takeaways

KEY TAKEAWAY

Overall, citizens are largely relying on username and password as their current authentication method.

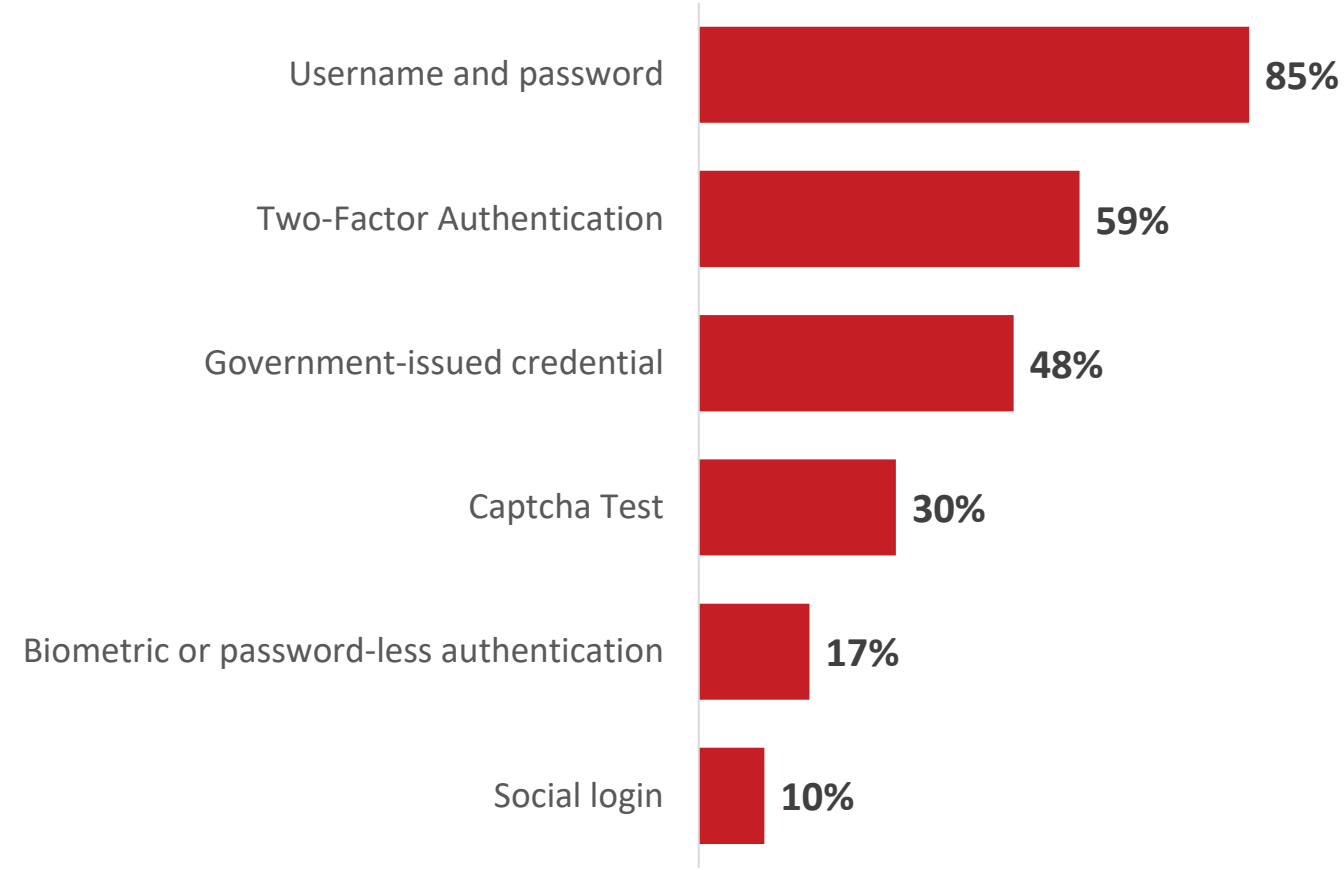
INSIGHT

- Nearly nine in ten say that citizens use username and password as their current authentication method, while only half use a government-issued credential

ACTION

- To broaden adoption of more secure authentication methods, citizens will need to be shown the risks of username and password and benefits of alternative authentication methods.

Current Authentication Methods Used by Citizens



KEY TAKEAWAY

Most are looking to expand their digital services in the next two years, but IAM providers are varied, with three in ten building them in-house.

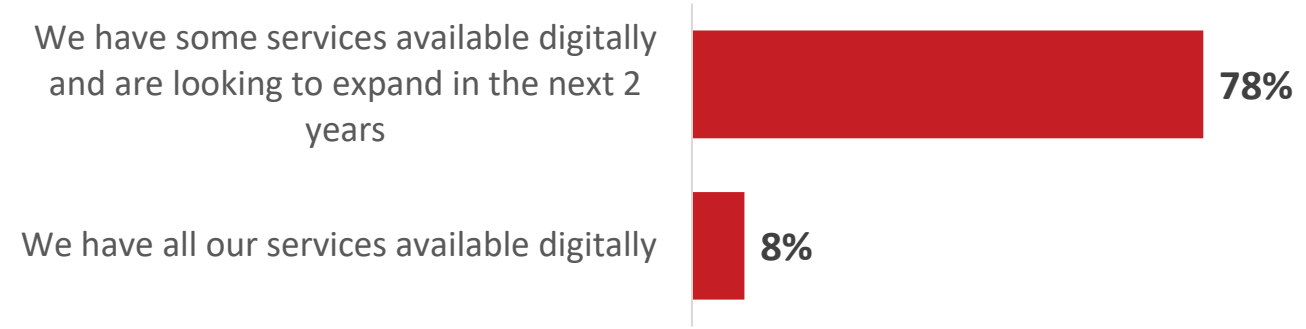
INSIGHT

- While less than one in ten have all their services currently available digitally, more than three-quarters have some available digitally and are looking to expand.
- Three in ten currently build their own IAM solutions in-house, with four in ten currently outsourcing.

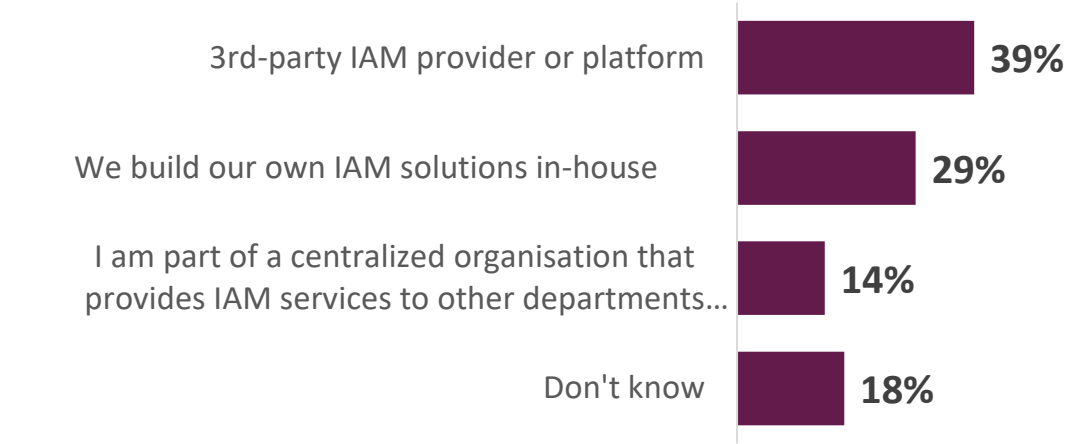
ACTION

- Identifying areas of opportunity for attaching IAM services to expanding digital services, focus marketing and messaging that shows clear benefits and value of outsourcing.

Current State of Digitizing Citizen Services



Who Provides IAM Services



KEY TAKEAWAY

Speed and internal resources are the biggest pain points in building IAM solutions in-house, but many pain points are seen.

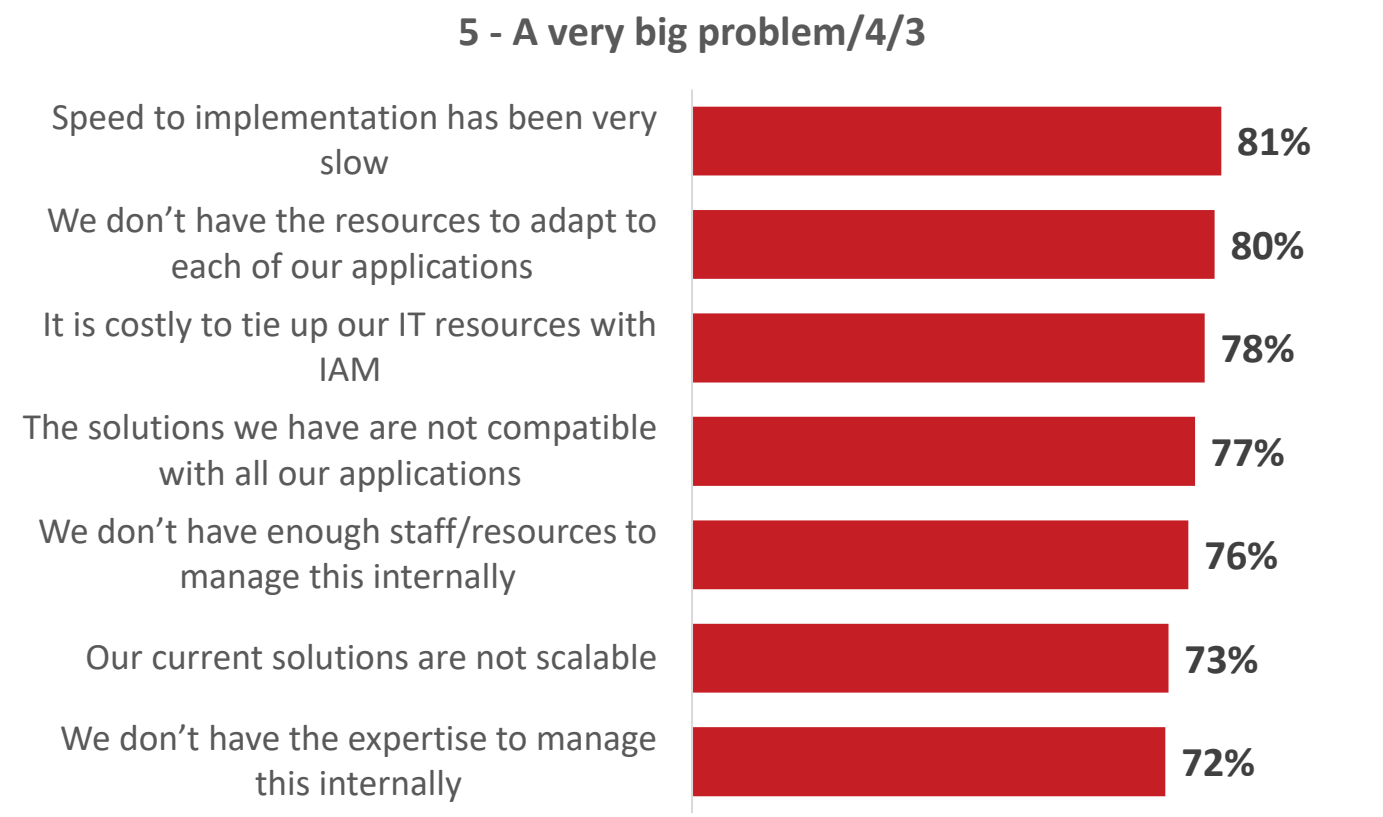
INSIGHT

- Seven in ten or more cited each potential pain point as at least a 3 on a 5-point scale.
- More than eight in ten cite speed to implementation as a pain point.

ACTION

- Marketing and messaging that can speak to how these pain points can be addressed via solutions will resonate with this audience.

Pain Points of Building IAM In-House



KEY TAKEAWAY

Respondents saw key weaknesses of improving existing services, improving existing services and accessibility of services via mobile.

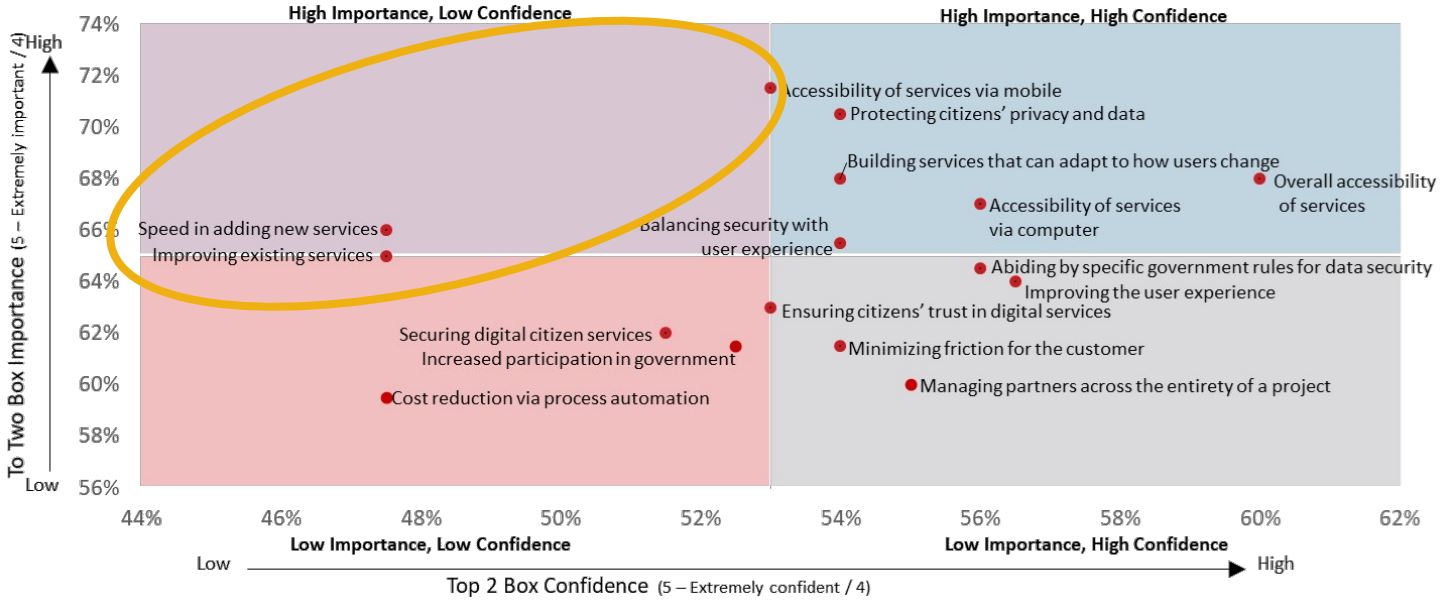
INSIGHT

- These aspects of citizen services are areas that are of high importance, but respondents had less confidence in their organization's ability to deliver.

ACTION

- Solutions that can help with accessibility and improving existing services would be of value to this audience.

Areas of Perceived Weakness



KEY TAKEAWAY

While having a single credential across services is seen as largely important, only a little over half have a single digital credential.

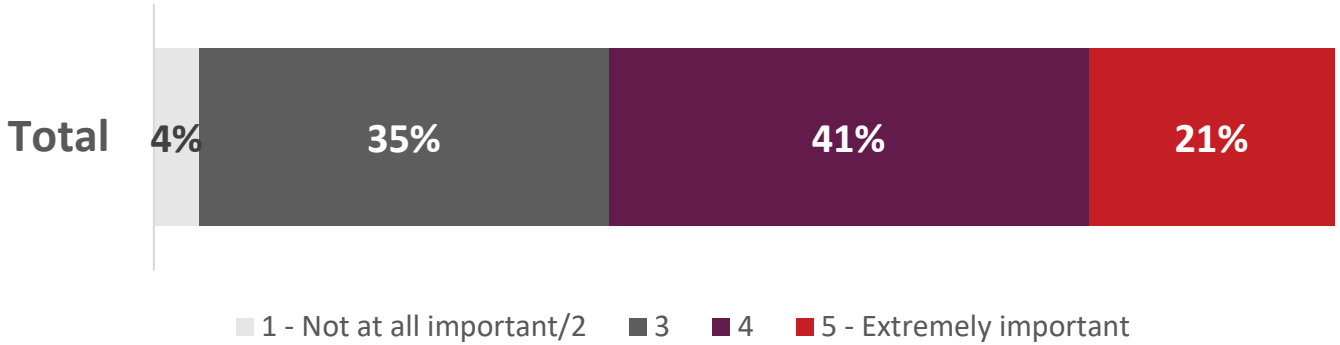
INSIGHT

- The importance is near universal – less than 5% view having one credential across services as a 1 or 2.
- However, just over half of services have a single credential – a significant opportunity.

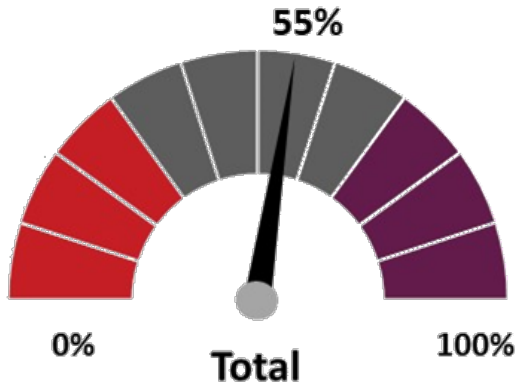
ACTION

- There's an opportunity to expand services using a single digital credential, if stakeholder see the value and benefits.

Importance Having One Credential Across Services



% of Services Having a Single Digital Credential



KEY TAKEAWAY

While value is seen in implementing a single IAM system, key issues of ensuring user experience, data privacy, interoperability and compliance must be addressed.

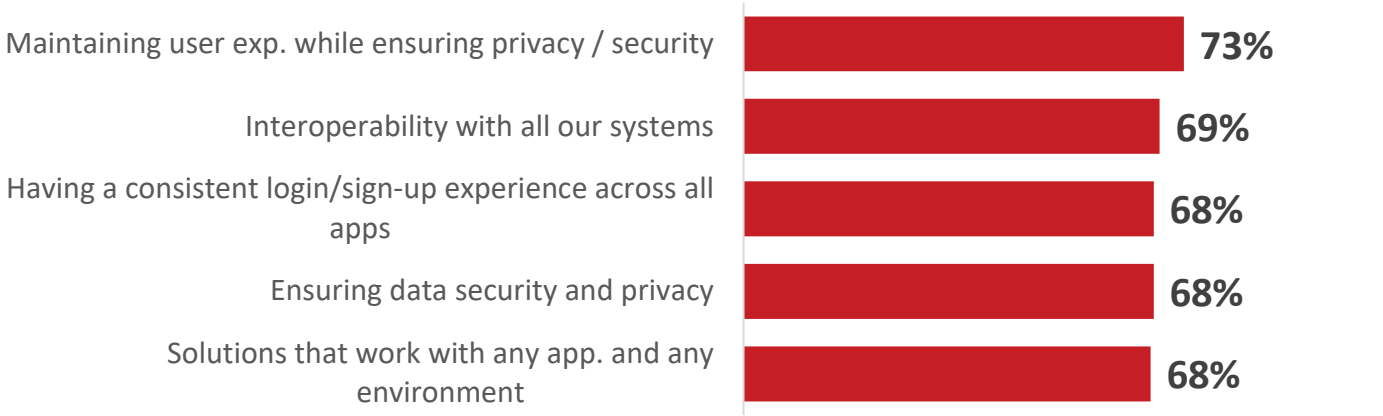
INSIGHT

- Maintaining the user experience while ensuring data privacy/security, interoperability and a consistent login experience are of top importance in implementing a single IAM system.
- More than three-quarters say they must be able to continue control over authorization, while many agree that implementing a single service hub for identity will simplify work for core development teams.

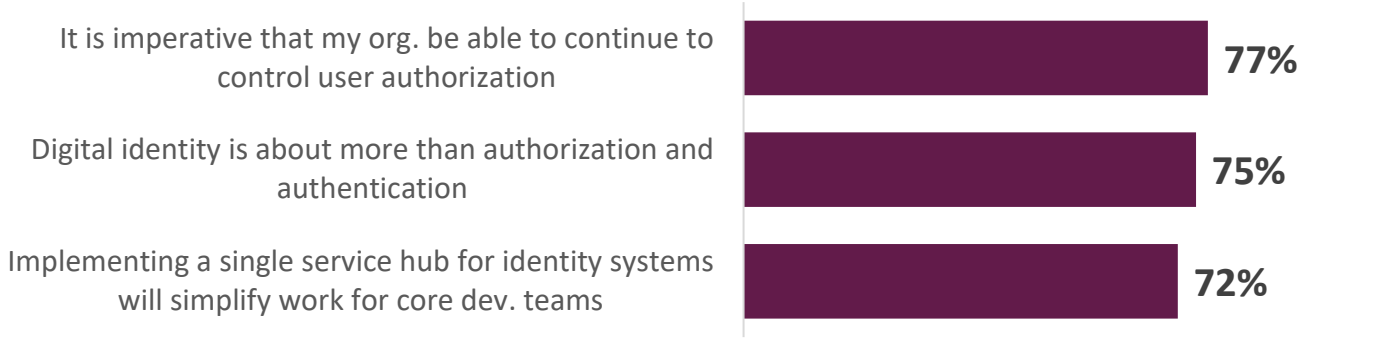
ACTION

- Any marketing and messaging around IAM solutions must address these key areas of concern.

Top Aspects of Implementing Single IAM System



Strongly/Somewhat Agree



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Appendix

Respondent Classifications: Years Served - UK

Six in ten respondents have served at least six years.

	UK
Less than 1 year	3%
1-5 years	40%
6-10 years	40%
11-15 years	15%
16-19 years	3%
20+ years	1%

How many years in total have you served as a government employee? (Include military service, if applicable.)