5 Lessons Learned From CISOs' Technology Adoption Plans for 2023

Wayne Hankins

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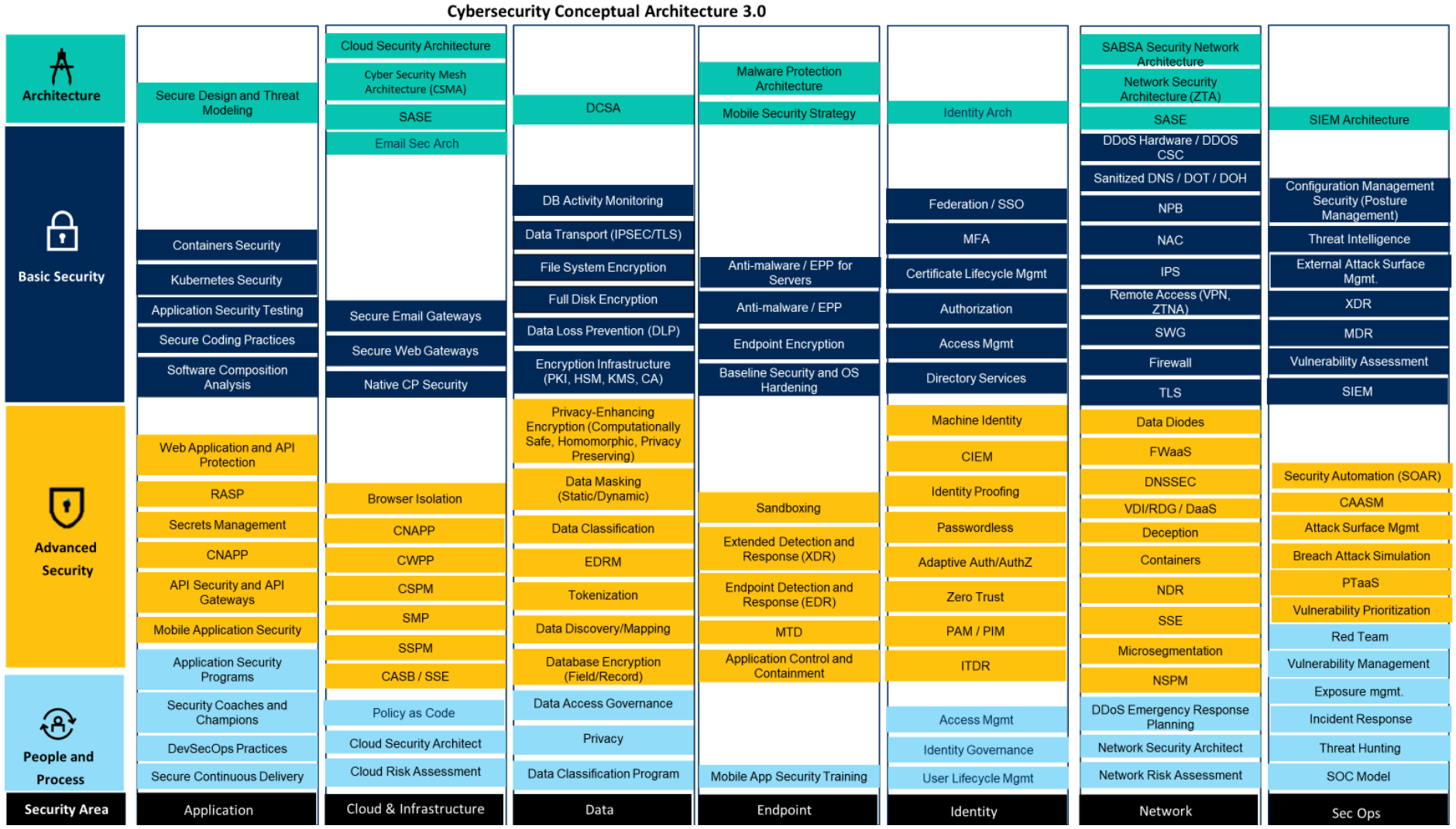
Where to Start



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Discussion Outline

1 What does the technology adoption roadmap cover?

2 The five lessons learned for the CISO's TAR:

- What is the outlook for cybersecurity budgets in 2024?
- Application and data security improve cloud-native applications?
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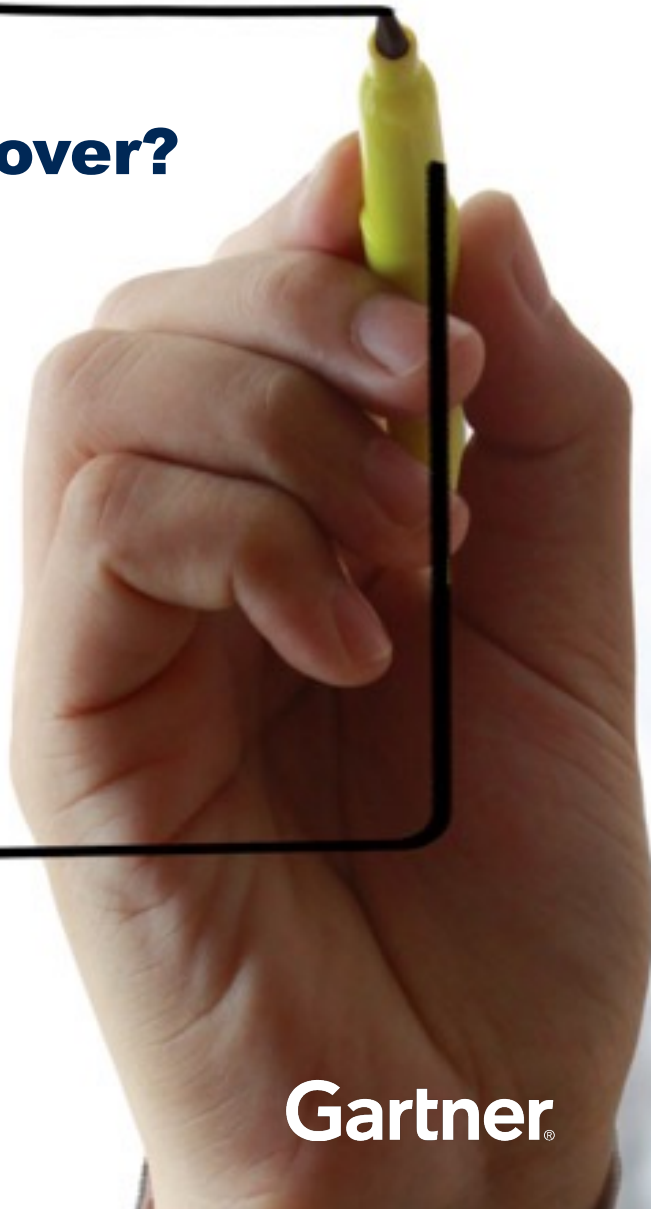

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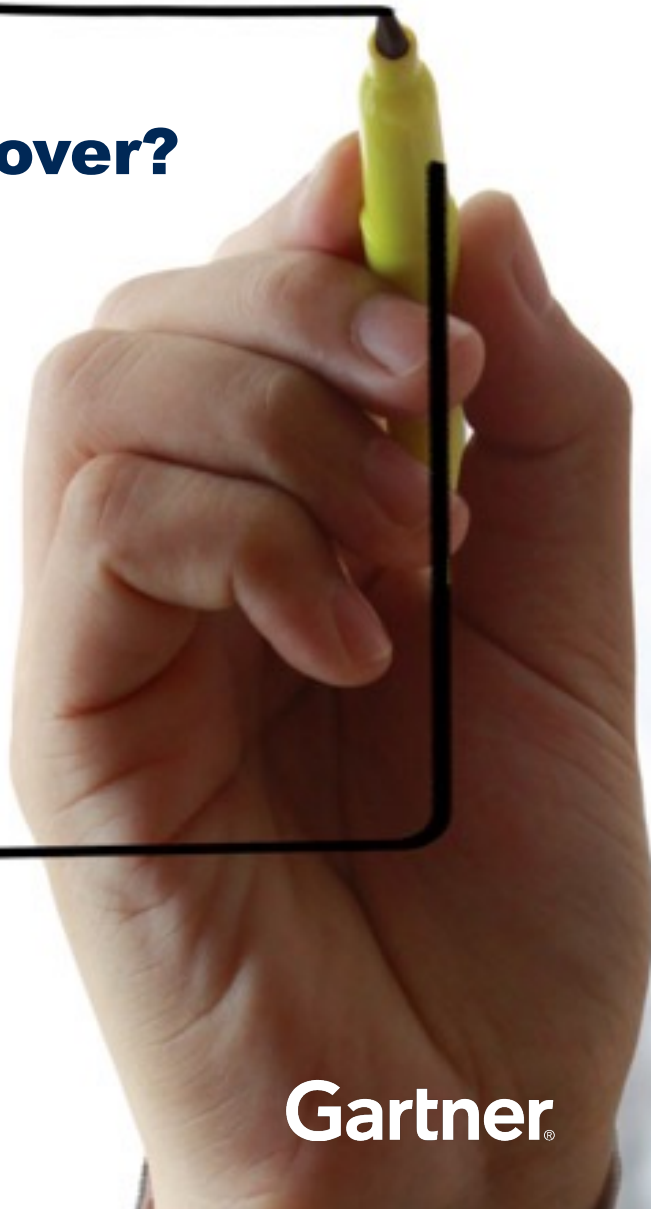

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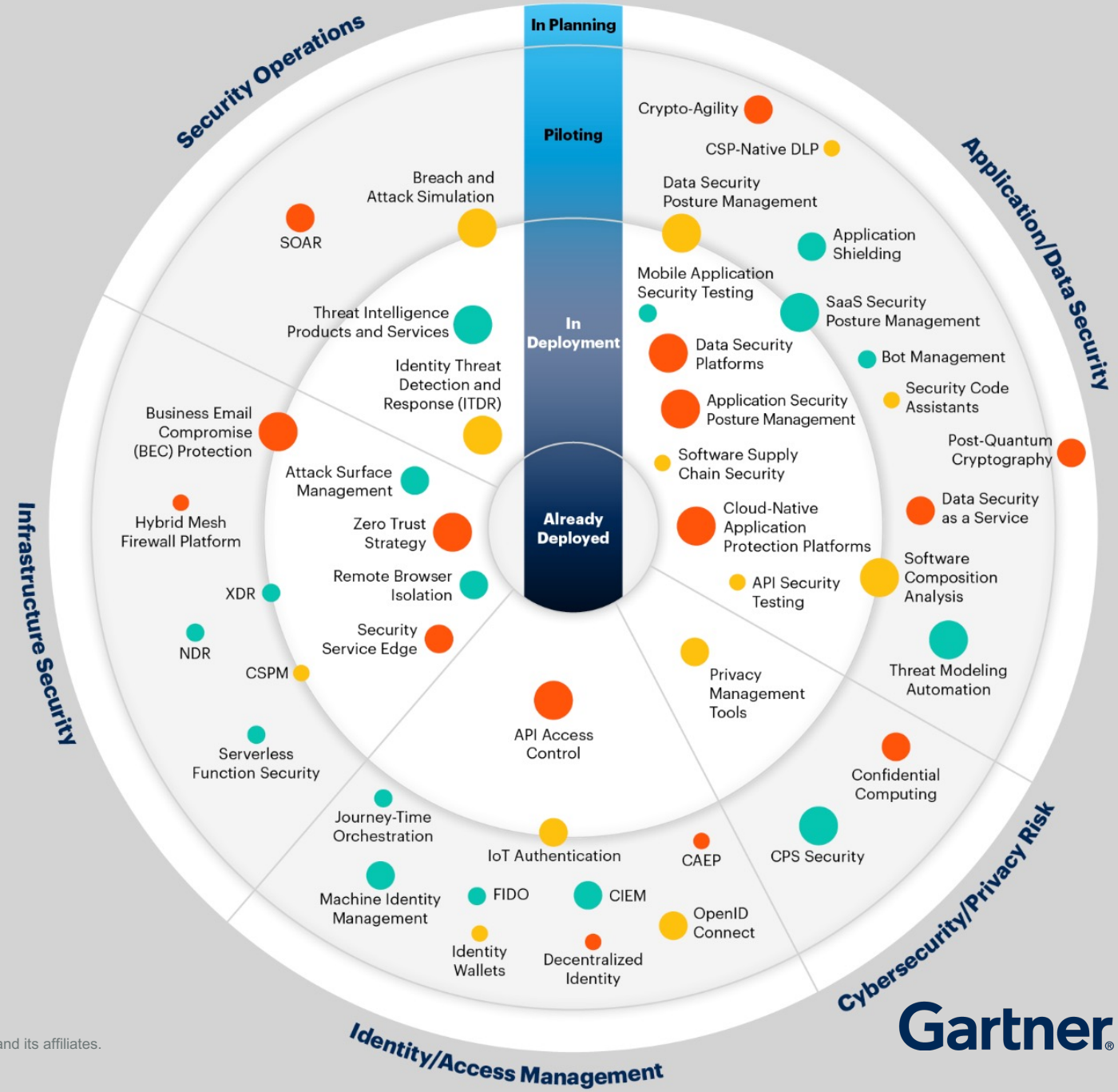
2024 Technology Adoption Roadmap for Security and Risk Management

Deployment risk

Low Medium High

Enterprise value

Low Medium High



n = 164; security & risk management leaders

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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2024 Technology Adoption Roadmap for Security and Risk Management

Enterprise Value

The value factor awarded to each technology is based on the analysis of value drivers, including increased cost-efficiency, improved speed and agility, enabled resilience, enhanced employee productivity, and delivery of superior capabilities to consumers.

Low Medium High

Deployment Risk

The risk factor awarded to each technology is based on the analysis of potential risks posed, including talent unavailability, high or unpredictable costs, cybersecurity risk, technical incompatibility or architecture complexity, and inability to switch providers due to vendor lock-in.

Low Medium High

Adoption Phase

The adoption phase is determined by the current deployment plans for a majority of organizations. Technologies placed on the border between phases are on the cusp of moving into the next deployment phase.

n = 164; security & risk management leaders

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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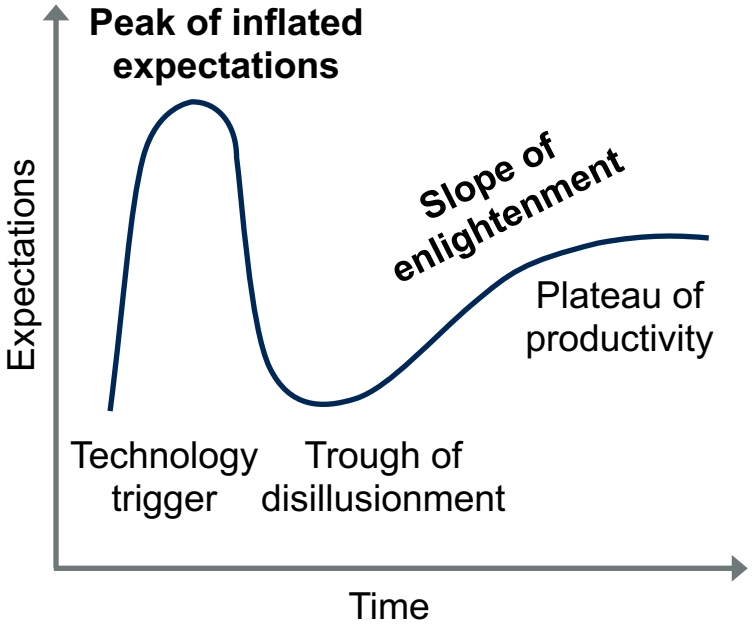
Gartner's Suite of Complementary Products

Overview of three different methodologies



Hype cycle

- Longer time horizons
- Technology landscape assessment
- Gartner analysts

n = 164; security & risk management leaders

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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Gartner's Suite of Complementary Products

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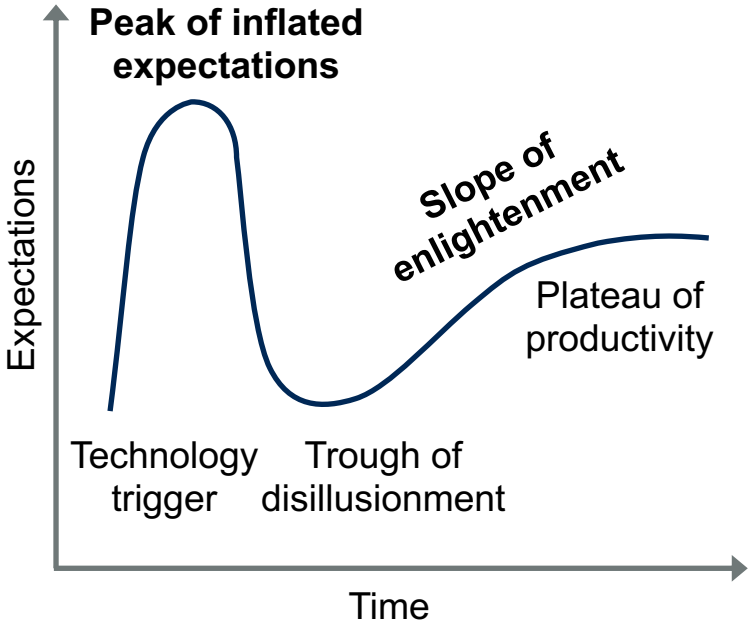

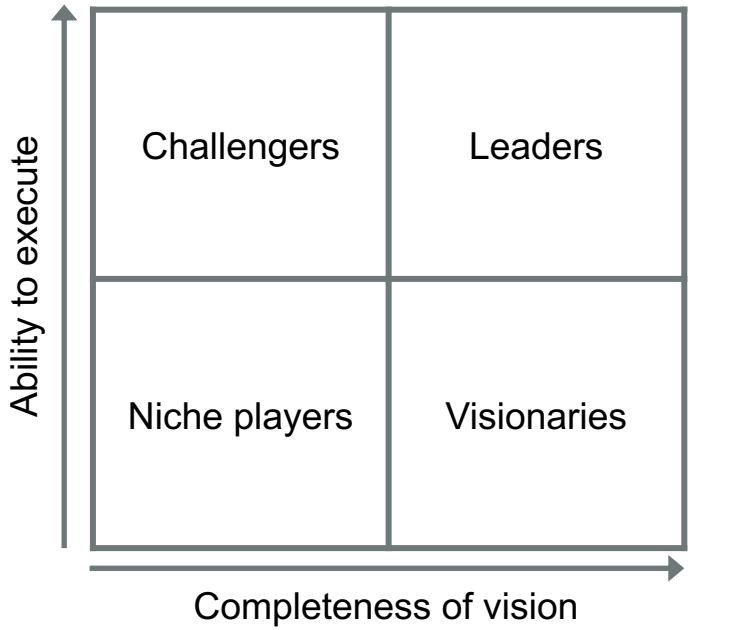

Hype Cycle

- Longer time horizons
- Technology landscape assessment
- Gartner analysts

Magic Quadrant and Critical Capabilities

- Key vendors and products
- Enables vendor selection decisions
- Gartner analysts

n = 164; security & risk management leaders

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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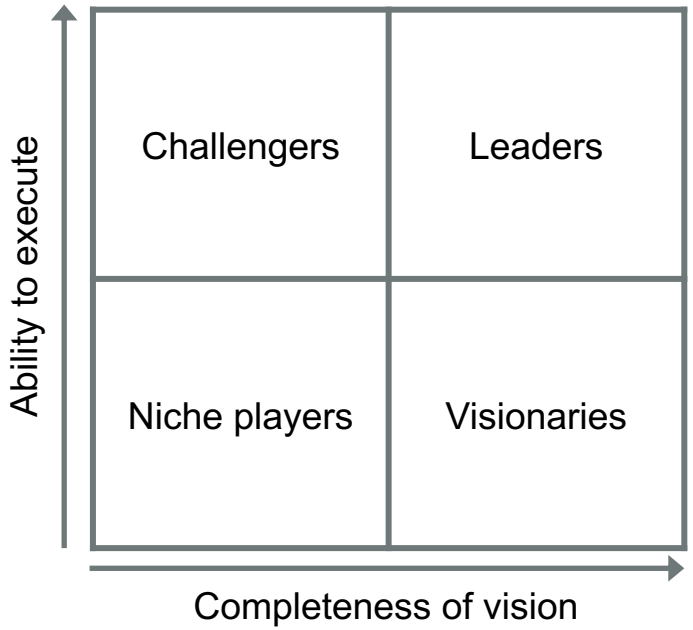
Gartner's Suite of Complementary Products

Overview of three different methodologies



Magic Quadrant and Critical Capabilities	Technology Adoption Roadmap (TAR)
• Key vendors and products	• 12-18 months time horizon
• Enables vendor selection decisions	• Benchmarks adoption plans
• Gartner analysts	• Enterprise users

n = 164; security & risk management leaders

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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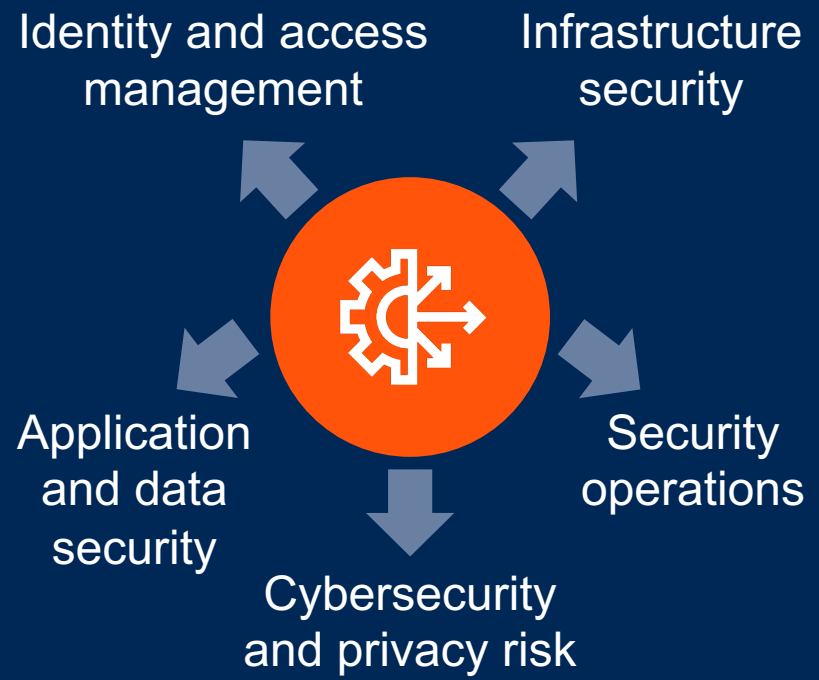
Scope of the Technology Adoption Roadmap

Details of the 2024 Technology Adoption Roadmap

167 SMR leaders from large enterprise

44 technologies



5 technology domains

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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1 What does the technology adoption roadmap cover?

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- **What is the outlook for cybersecurity budgets in 2024?**
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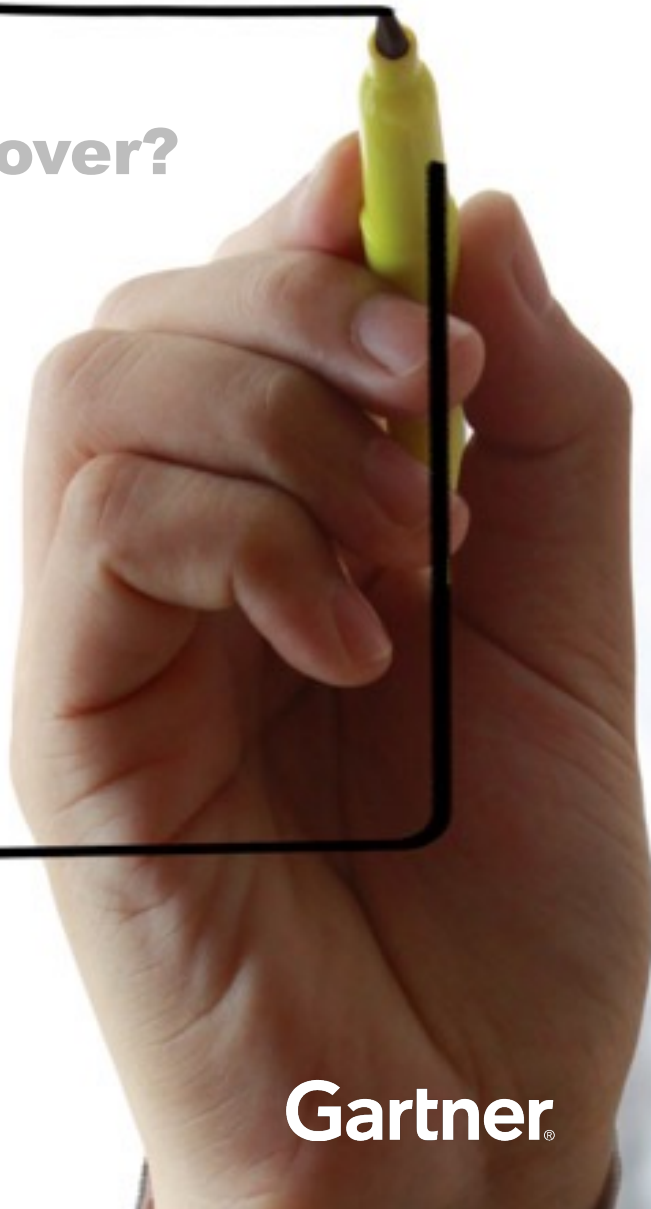

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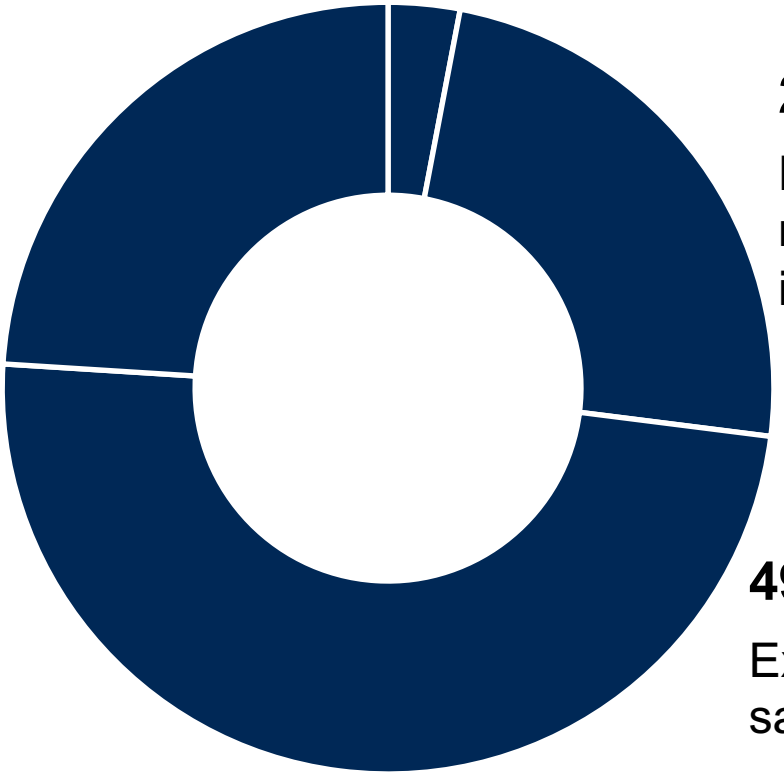
SRM Leaders Expecting Increase to Maintain Posture

What impact do you anticipate on your cybersecurity/information security budget for the financial year 2024, considering current economic conditions?



3%

Expect it to decrease in real terms

24%

Expect it to remain the same, reducing purchasing power due to inflation or cost pressure

49%

Expect it to increase, to maintain the same level of purchasing power

24%

Expect it to increase, to maintain the same level of purchasing power

n = 167 (SRM leaders from global organizations); 44 (technologies)

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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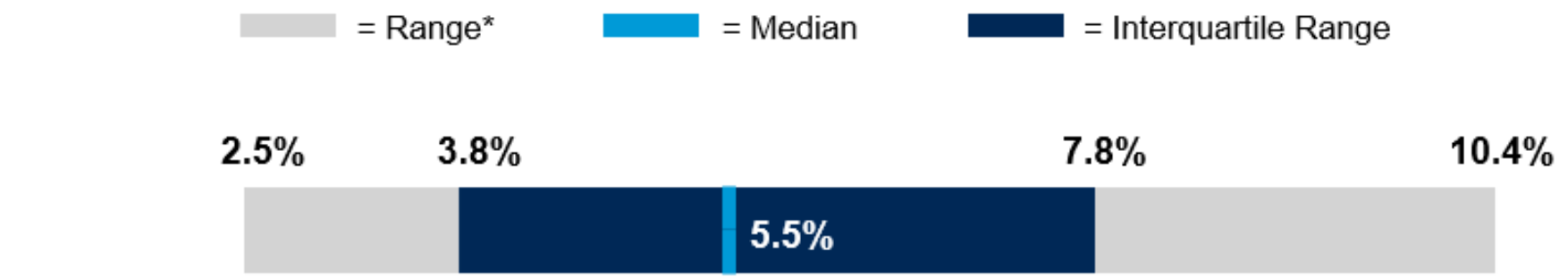
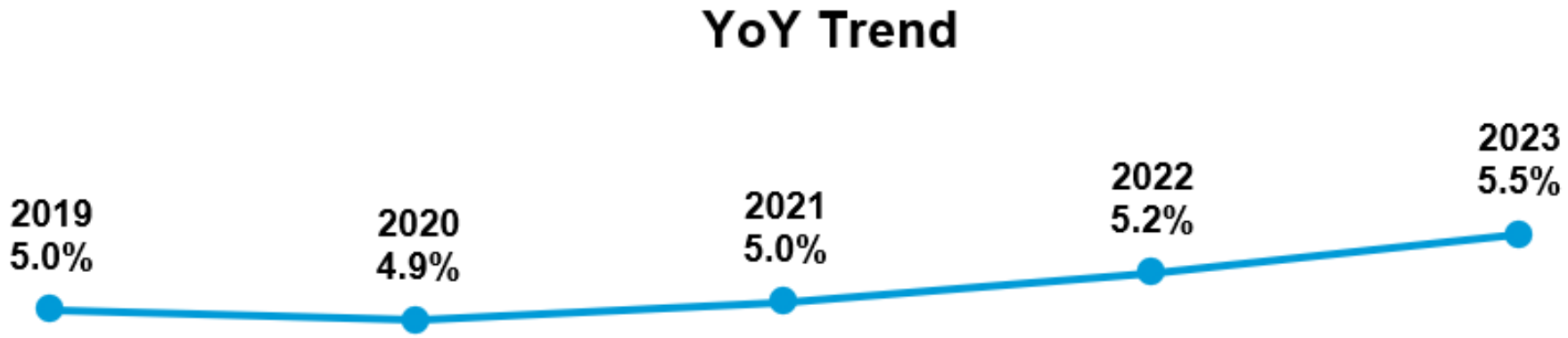
SRM Leaders Expecting Increase to Maintain Posture

IT security spending as a percent of total IT spending clarifies the relative level of investment to support the security of the total IT environment from a total IT portfolio perspective





*Range includes the 10th to 90th percentile of the sample

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High Risks Due to High Cost

Deployment phases of applications and data security technologies in the 2024 Technology Adoption Roadmap

	Monitoring	In planning	In pilot	In deployment
Application security posture management				●
Cloud-native application protection platforms				●
Software supply chain security				●
API security testing				●
Data security platforms				●

n = 167; (SRM leaders from global organizations); 17/44 (technologies)

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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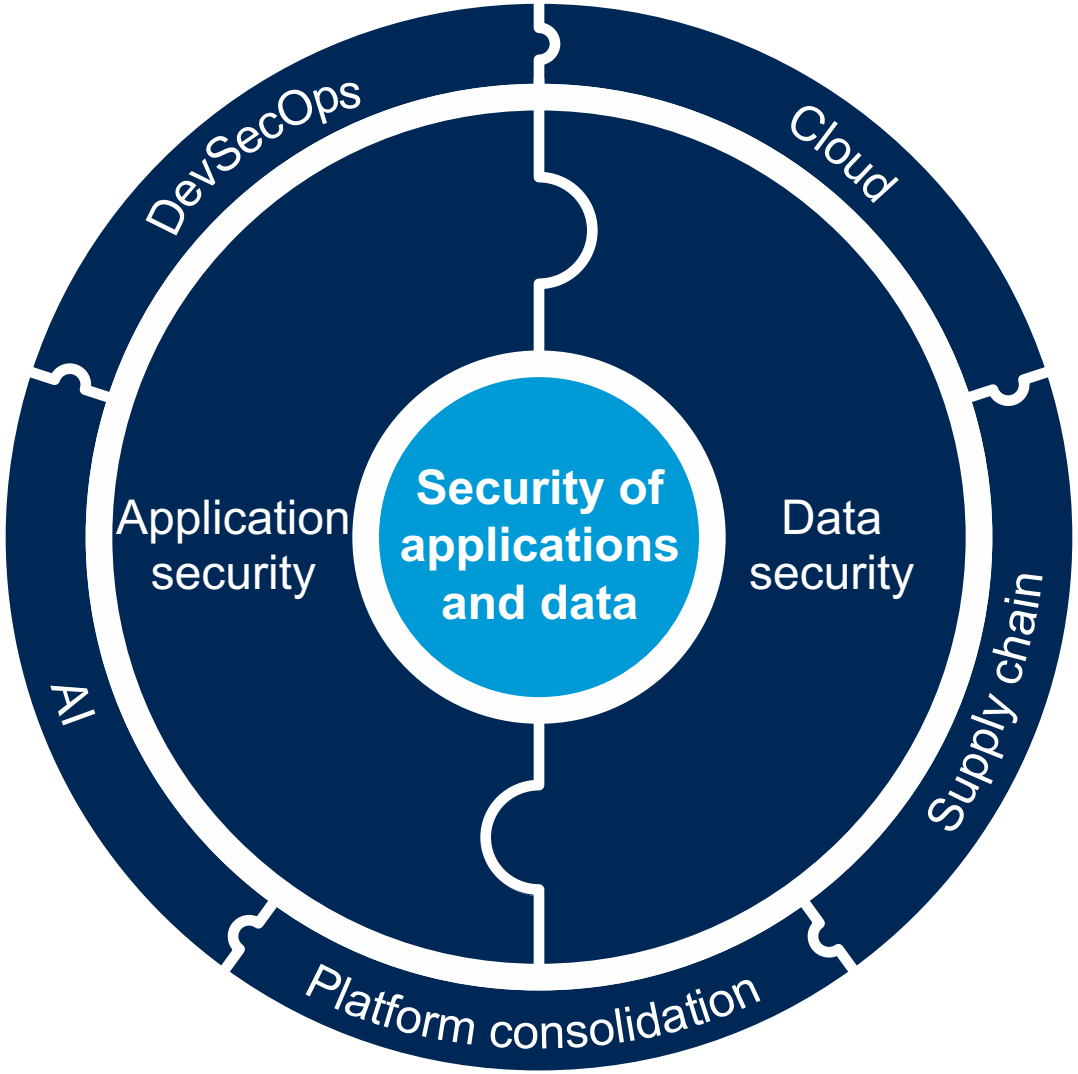
Data Security Platforms

Recommendation to improve DSP deployments

- Reduce vendors or products, complexity and costs.
- Variety of data stores and business applications.
- Core design consideration
- Write policy-based data access rules.



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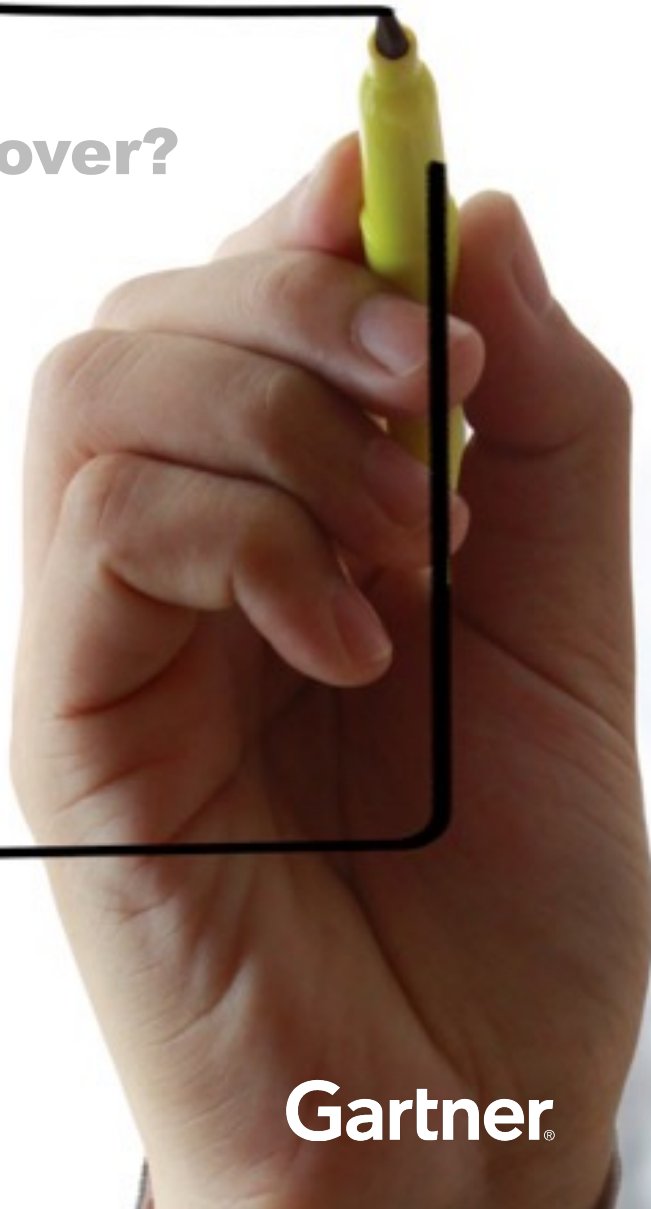

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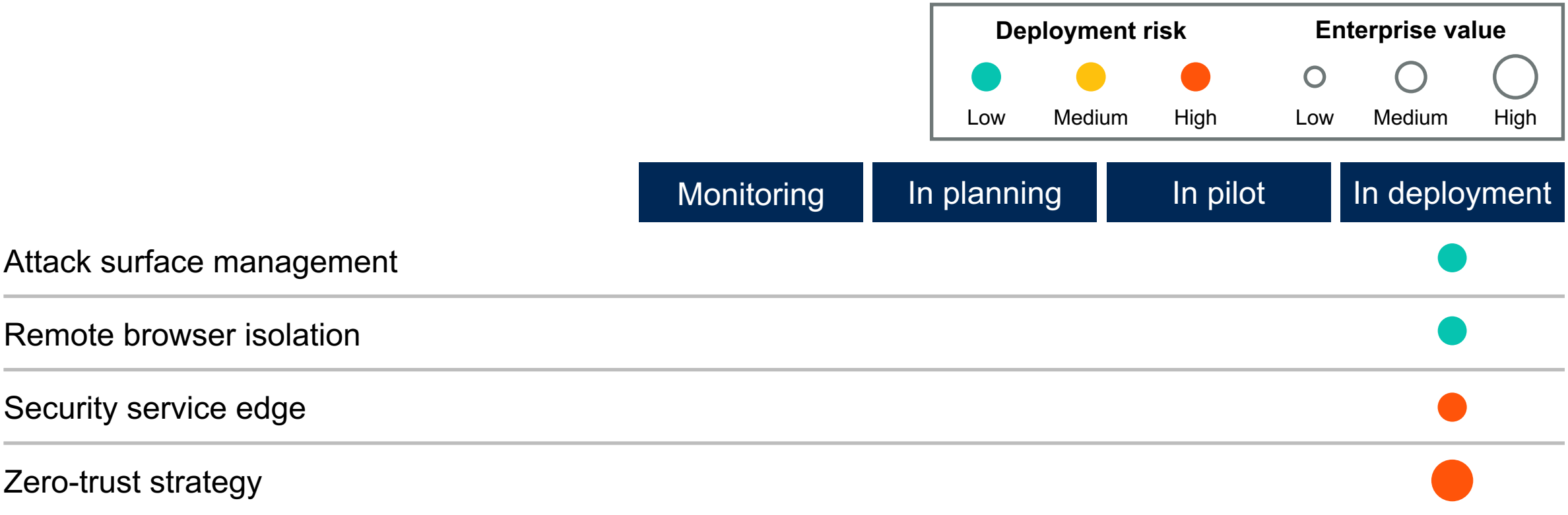
High Risk Due to High Cost

Deployment phases of infrastructure security IPs in the 2024 technology adoption roadmap



n = 167; (SRM leaders from global organizations); 10/44 (technologies)

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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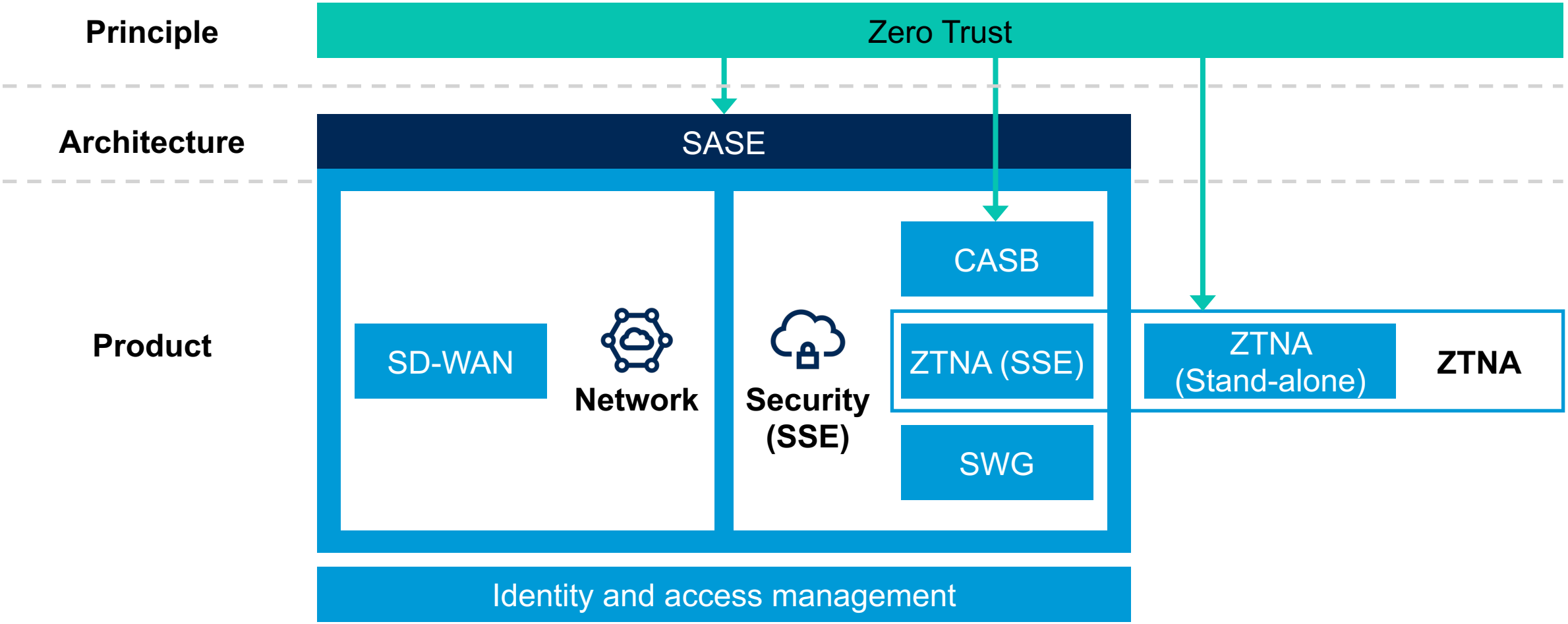
Security Service Edge

The relationship between SASE and SSE



Source: Market Guide for Zero Trust Network Access, China

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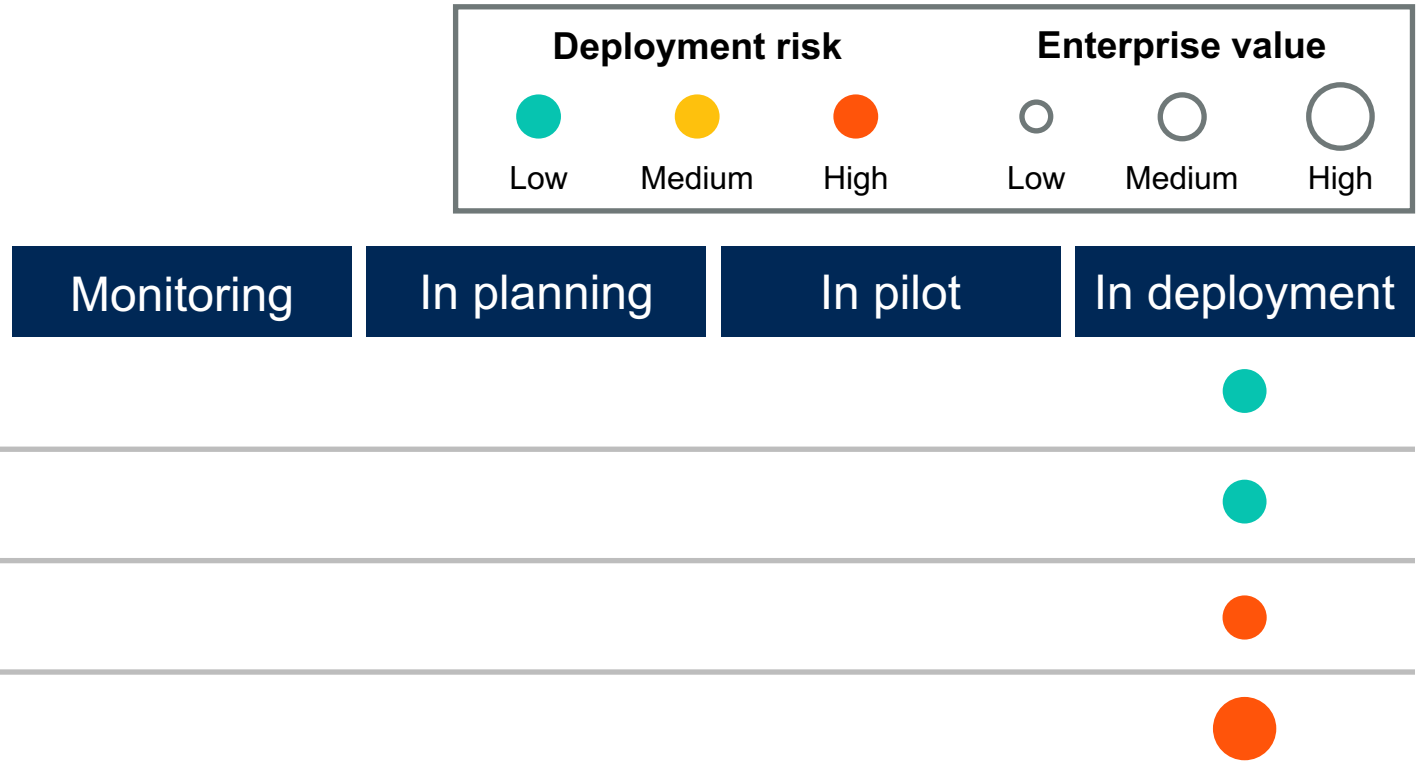
High Risk Due to High Cost

Deployment phases of infrastructure security IPs in the 2024 technology adoption roadmap



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Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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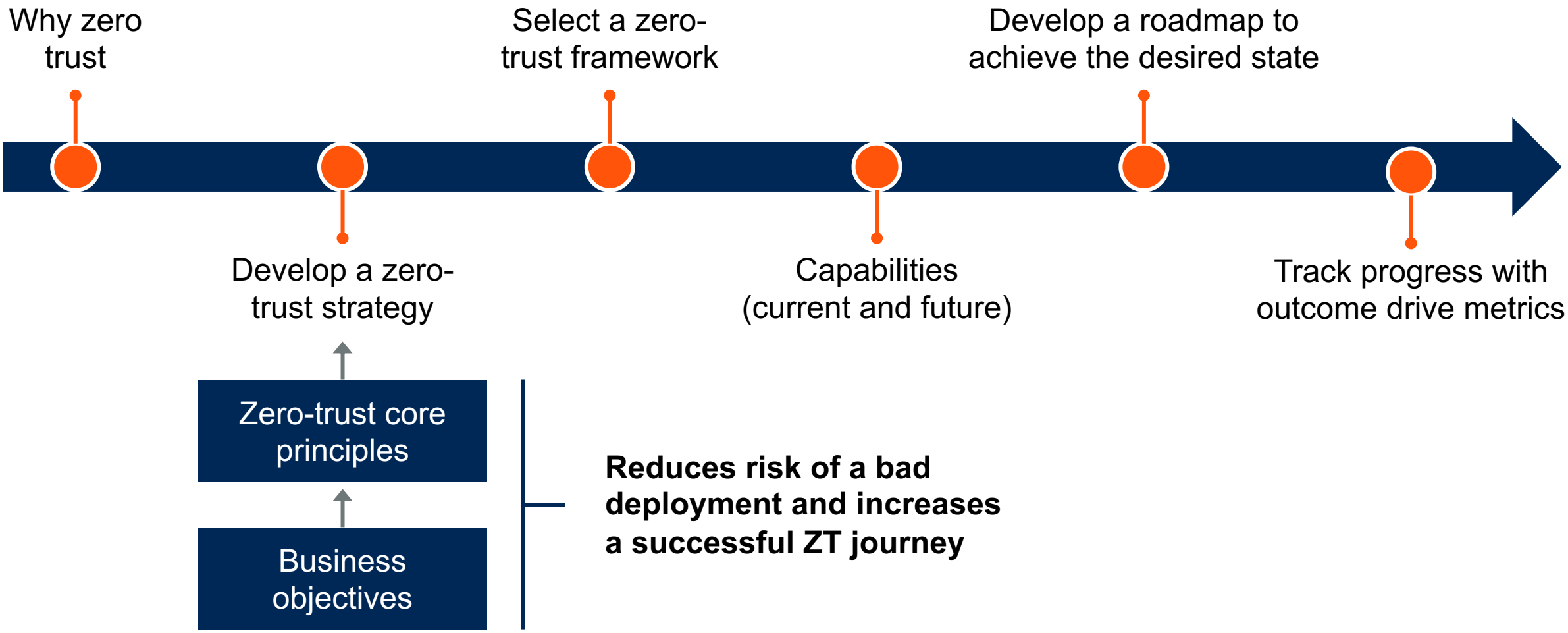
Zero-Trust Strategy

How to minimize risk during your organization's zero-trust journey



Source: 2023 Strategic Roadmap for Zero Trust Security Program Implementation

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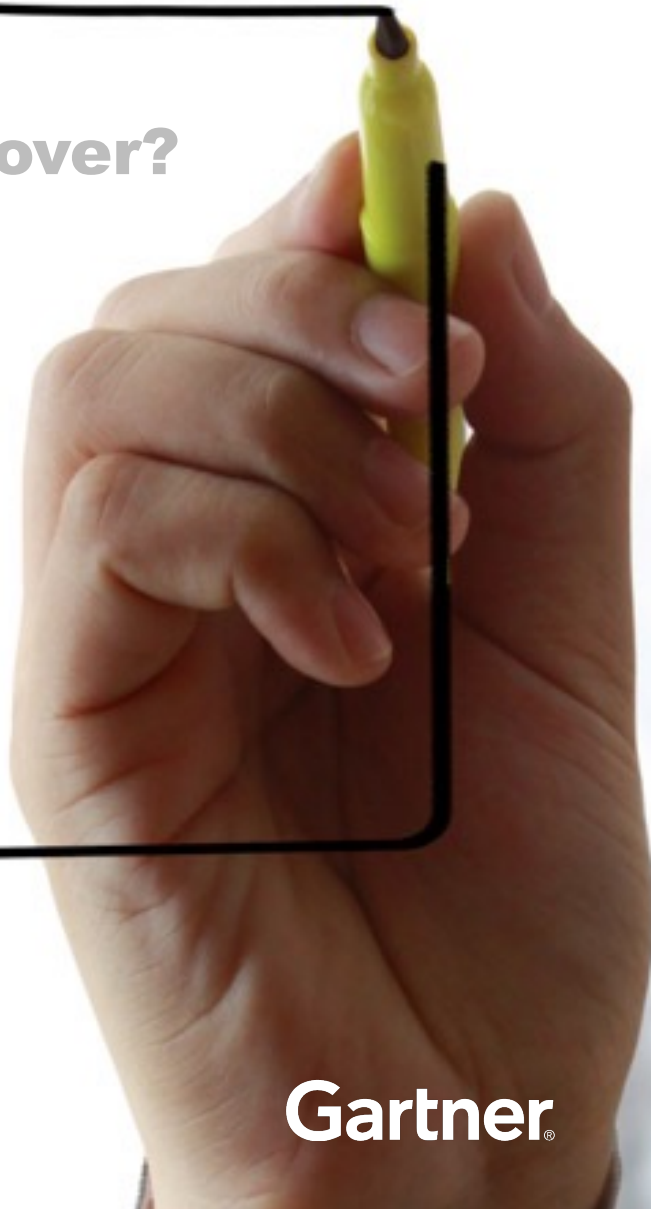

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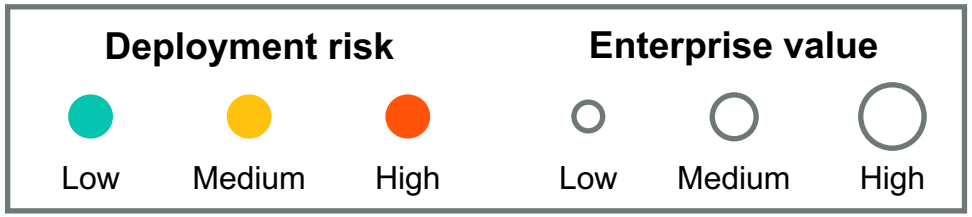
SRM Leaders Revisiting Deployment Strategy

Deployment phases of breach and attack simulation and NDR changed in the 2024 TAR



	2023 TAR	2024 TAR	Risk/value TAR 2024
Breach and attack simulation	Deployment end of 2023	In pilot	
NDR	In deployment	In pilot	

n = 167; (SRM leaders from global organizations); 44 (technologies)

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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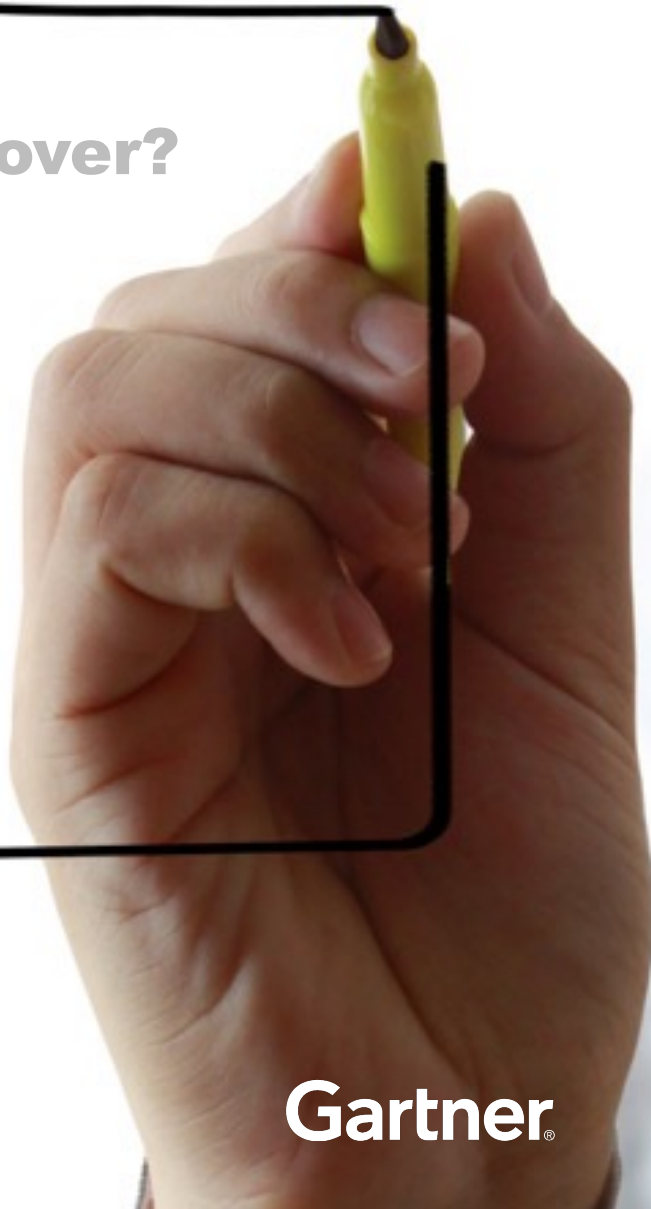

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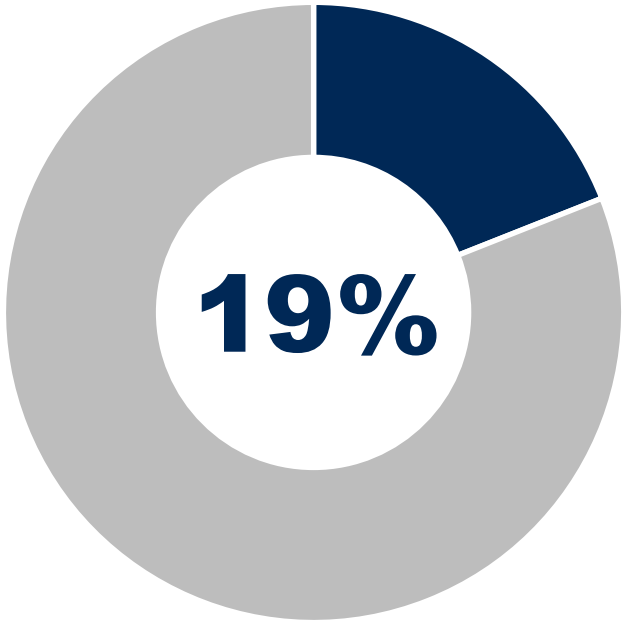
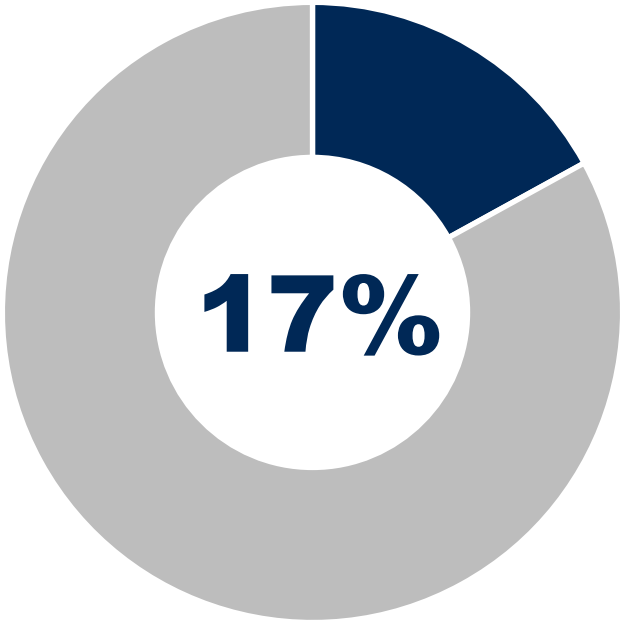
SRM Leaders understand GenAI Risks

Various ways in which SRM leaders anticipate generative AI-related risks



GenAI-powered cyber-attacks
(e.g., phishing, scams, BEC, malware)



Erroneous or unethical decision-making due to AI bias, hallucination or misinformation

n = 167; (SRM leaders from global organizations); 44 (technologies)
Q: What risks concern you most regarding Generative AI or GenAI?
Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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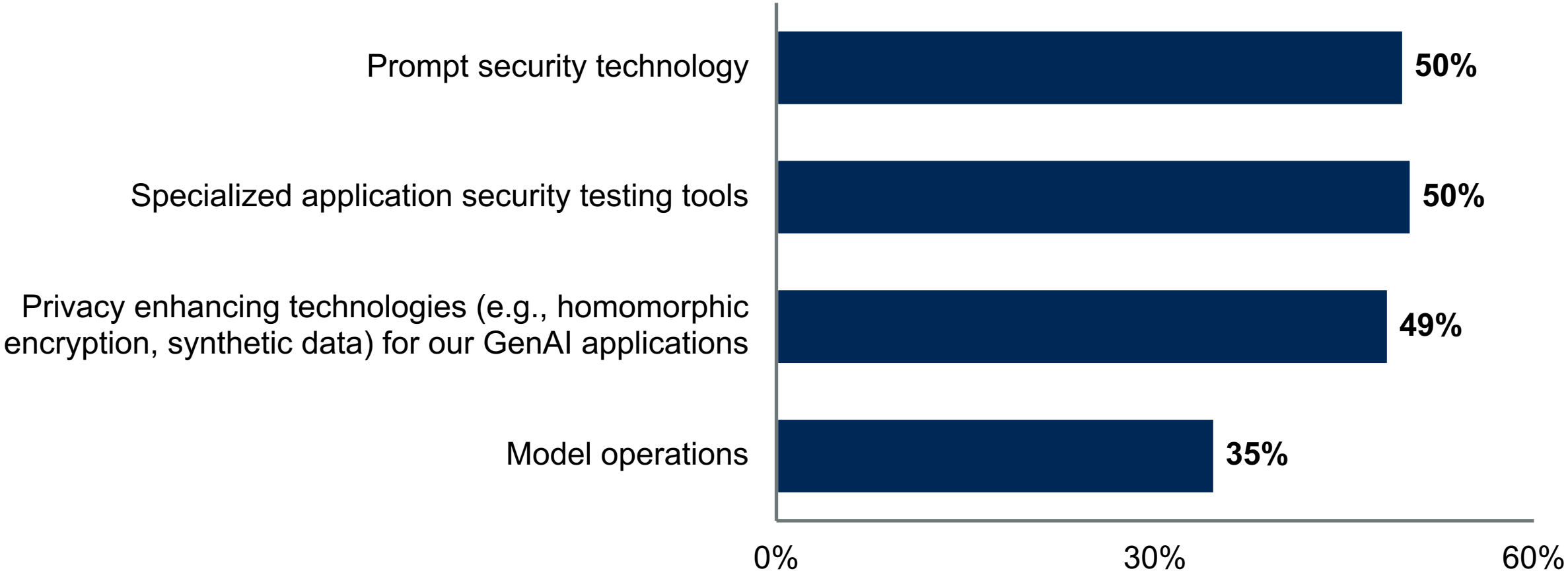
SRM Leaders Are Securing GenAI Applications

Various ways in which SRM leaders are thinking of protecting their enterprises GenAI applications



n = 167; (SRM leaders from global organizations); 44 (technologies)

Q: Is your enterprise investing or planning to invest in any cybersecurity technologies to protect your GenAI applications in 2023-2025?

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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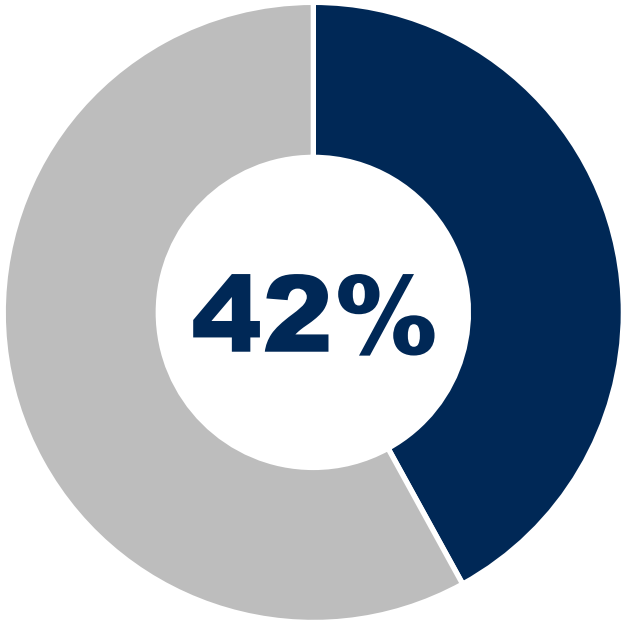
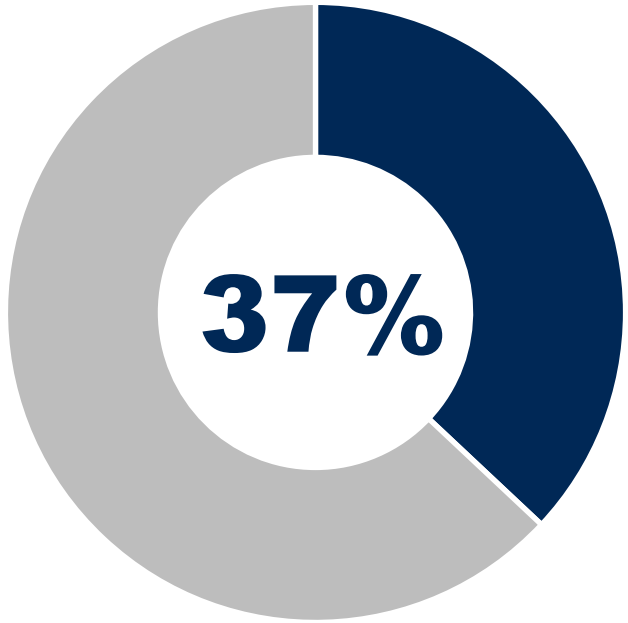
SRM Leaders Are Optimistic About Generative AI

Various ways in which SRM leaders foresee generative AI impacting cybersecurity daily work



Generative AI user interface (“virtual assistants”) in existing security tools



GenAI-powered third-party, supply chain, vendor risk management platform

n = 167 (SRM leaders from global organizations); 44 (technologies)

Q: Is your enterprise investing or planning to invest in any GenAI cybersecurity technologies and/or use cases in 2023-2025?

Source: 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

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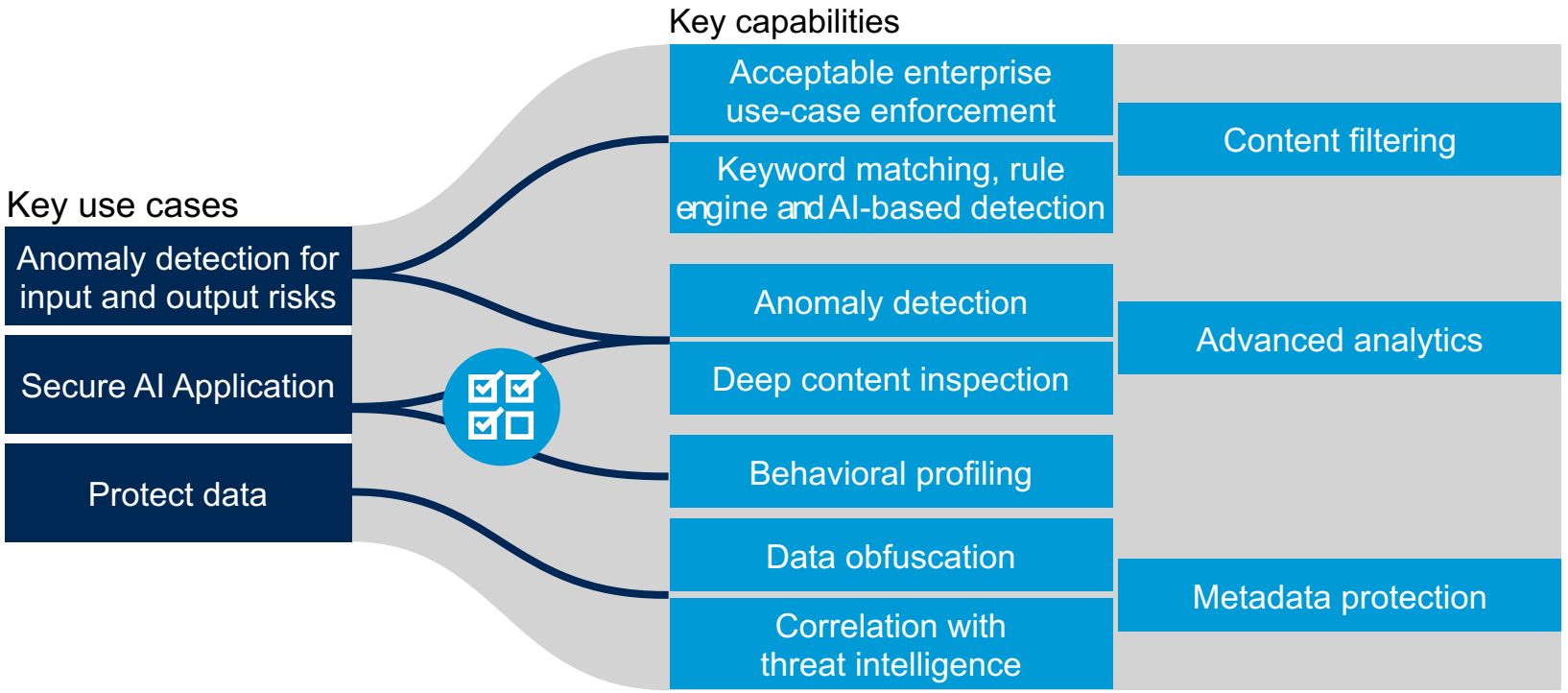
Generative AI Brings New Risks in Three Categories

Content anomalies, data protection and AI application security



Key trends affecting this market:

Consolidation with legacy security products	Integration with model provider functionality	Expansion of functionality into adjacent areas	Multimodal interfaces and capabilities
Satisfy initial user needs for usage maps	Niche emerging market with low revenues	GenAI data protection standards emerging	GenAI bias mitigation tools merging

Recommendations

1. Proof of concepts
2. Content anomaly detection
3. Evaluate AI application products
4. Continue to use known legacy controls

Source: Innovation Guide for Generative AI in Trust, Risk and Security Management

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Recommended Gartner Research

To learn more about access to Gartner research, expert analyst insight, and peer communities, contact your Gartner representative or click on “Become A Client” on gartner.com to speak with one of our specialists.

- **Innovation Guide for Generative AI in Trust, Risk and Security Management**
  Avivah Litan, Jeremy D’Hoinne and Gabriele Rigon
- **Use-Case Prism: Generative AI for Defense**
  Michael McFerron
- **Quick Answer: What Is Zero Trust Networking?**
  Andrew Lerner and John Watts
- **2024 Strategic Roadmap for SASE Convergence**
  John Watts, Andrew Lerner and Neil MacDonald
- **Top Trends in Cybersecurity for 2024**
  Richard Addiscott, Jeremy D’Hoinne and others
- **Quick Answer: What Are the Core Principles of Zero Trust?**
  Wayne Hankins, Charlie Winckless and Andrew Lerner
- **Infographic: 2024 Technology Adoption Roadmap for Security and Risk Management**
  Aanchal Mair

Access to Gartner research is subject to individual subscription type and product entitlements.

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Additional Recommendations

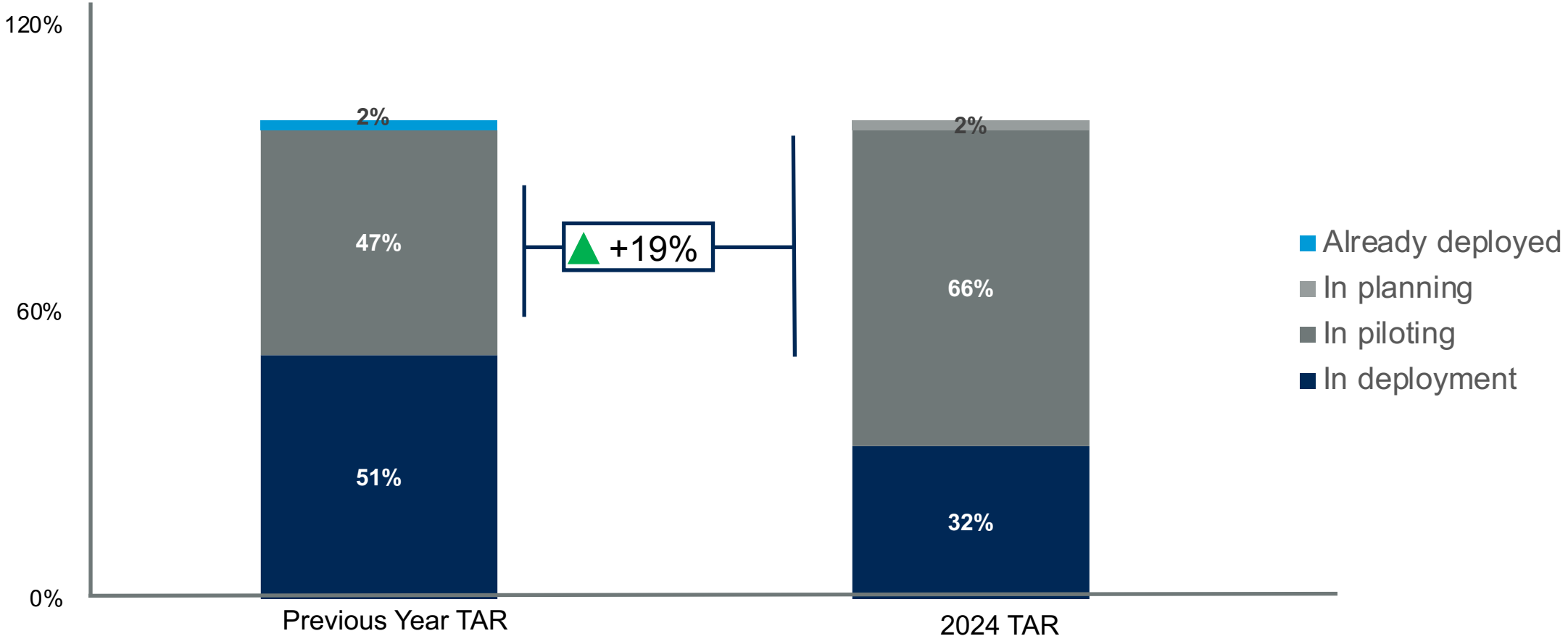
- Align the appropriate level of protection to support the business crown jewels.
- If you have a business impact analysis report, leverage it to help identify what are your critical assets for the business and develop to support the business.
- Utilize outcome-driven metrics. They have a direct line of sight to the operational outcomes of investment and to the level of protection delivered in a business context.

Additional Resources

More Technologies in Piloting in 2024

Distribution of technologies by adoption stage

Percentage of technologies



n = (SRM leaders from global organizations) = 126 (2022), 167 (2023); n (technologies) = 49 (2022), 44 (2023)

Source: 2022 Gartner Technology Adoption Roadmap for Large Enterprises Survey; and 2023 Gartner Technology Adoption Roadmap for Large Enterprises Survey

Q: Please indicate the stage that best reflects your organization's adoption plan for each of the technologies: Not Monitoring, Monitoring, Planning, Piloting, in Deployment and Already Deployed.

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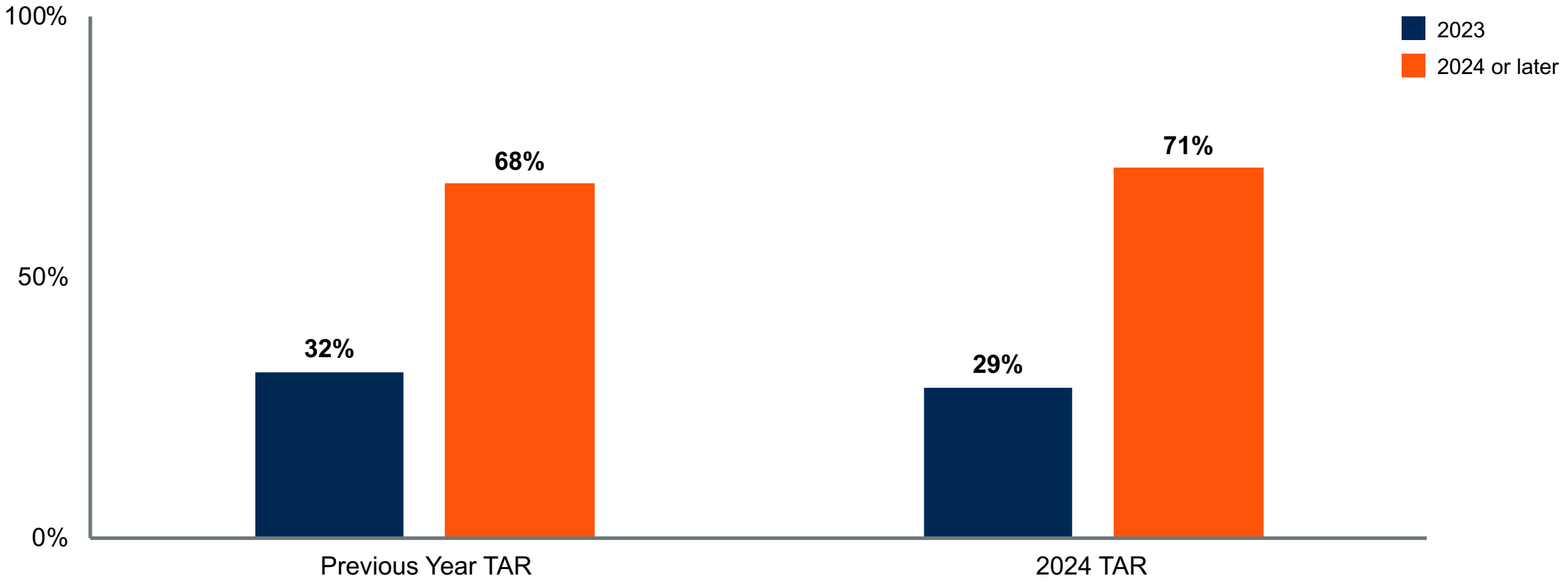
Moderate Speed of Deployment in 2024

Distribution of technologies that are “In deployment” stage by timeline

Percentage of technologies expected to be in deployment within the next 18 months



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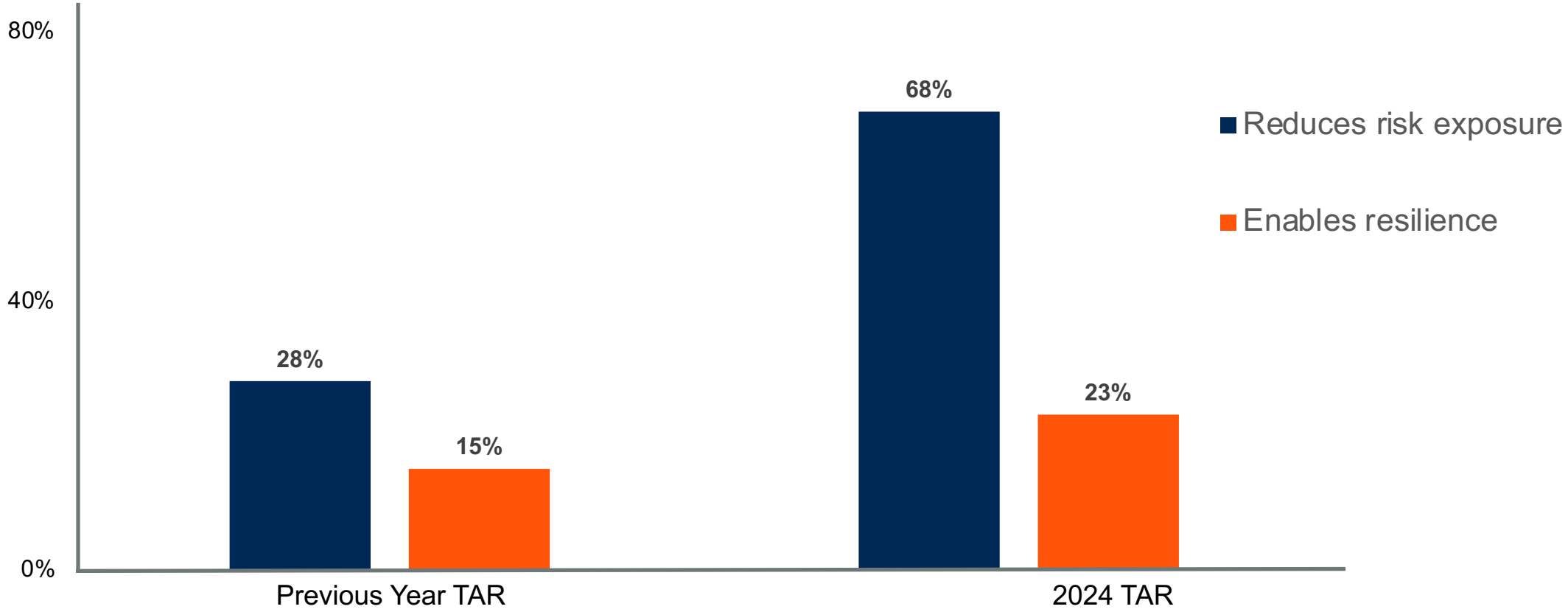
Reduces Risk Exposure No. 1 Priority for Tech Adoption

Reduces risk exposure and enables resilience selected as a value driver for techs in previous and current year's TAR
Percentage of technologies



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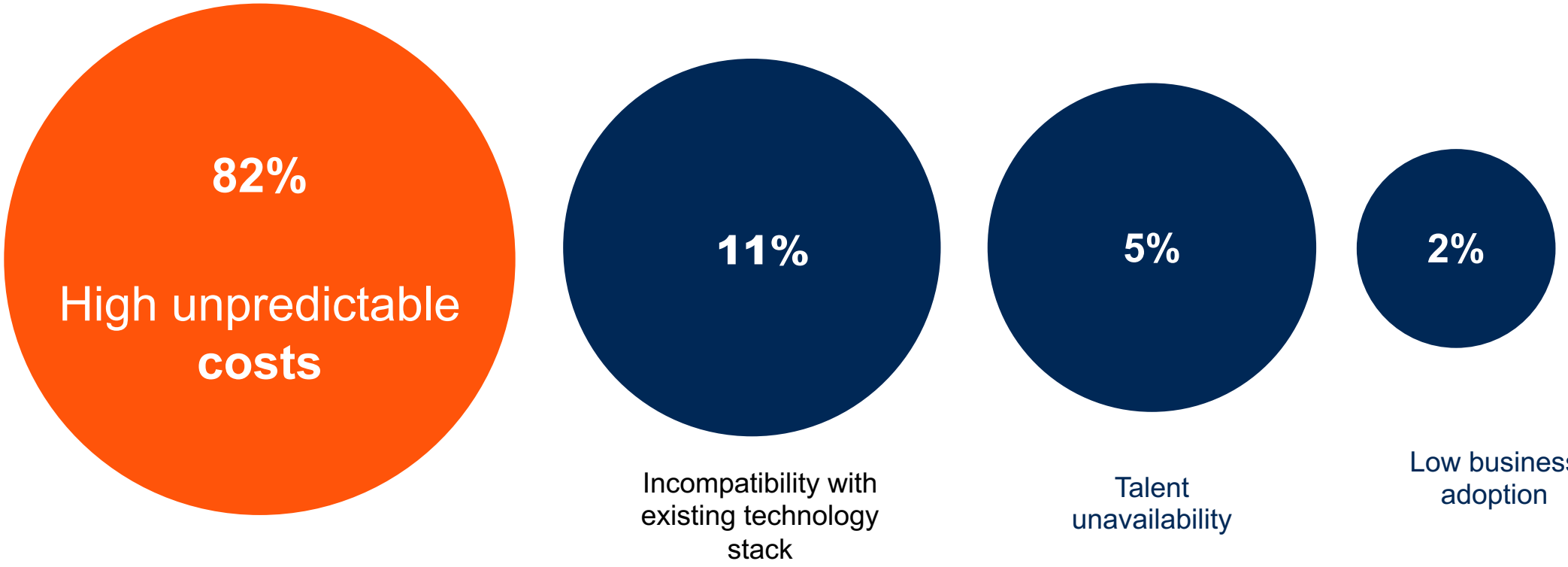
Unpredictable Cost No. 1 Risk for Tech Adoption

Primary risk driver of technologies this year

Percentage of technologies



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