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Identity Security Posture Management (ISPM) Market Size Share, Growth Analysis, By Offering (Solutions, Services), Deployment Mode (On-premises, Cloud), Organization Size, Vertical and Region - Global Industry Forecast to 2029

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Abstracts

The identity security posture management (ISPM) market size is projected to grow from USD 13.7 billion in 2024 to USD 33.1 billion by 2029 at a Compound Annual Growth Rate (CAGR) of 19.3% during the forecast period. A key driver for adopting ISPM solutions is the increasing emphasis on zero trust security frameworks. As organizations shift away from traditional perimeter-based defenses to a zero-trust model, where verifying every access request regardless of origin is paramount, ISPM solutions become critical. By aligning with zero trust principles, ISPM enhances security resilience, reduces the risk of insider threats, and supports the dynamic, granular access control required in modern IT environments, driving the ISPM market growth.

'By vertical, the BFSI segment accounts for a larger market share.'

In the Banking, Financial Services, and Insurance (BFSI) sector, the adoption of ISPM solutions is driven by stringent regulatory compliance requirements such as SOX, GDPR, and PCI-DSS, alongside the escalating threat of sophisticated cyber attacks targeting financial institutions. The adoption is driven by the digital transformation of financial services, increased use of cloud technologies, and the proliferation of fintech solutions that demand holistic identity security solutions. ISPM solutions provide comprehensive, automated security that continuously monitors and mitigates identity risks, ensuring data integrity, enhancing customer trust, and maintaining regulatory compliance in this susceptible and dynamic industry.

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'Large enterprises account for a larger market share by organization size.'

Large enterprises have more than 1,000 employees. The large enterprises segment is projected to account for a larger revenue share in the global ISPM market. Large enterprises are increasingly adopting ISPM solutions driven by the need for efficient management of complex, diverse, and often global IT environments. Trends such as mergers and acquisitions, adopting hybrid and multi-cloud architectures, and shifting towards a highly mobile workforce create intricate identity and access management challenges. ISPM solutions offer large enterprises the ability to automate and streamline identity governance, providing real-time visibility and control over access privileges across various systems and locations.

By region, North America accounts for the highest market size during the forecast period.

North America is projected to lead the ISPM market during the forecast period. In North America, the adoption of ISPM solutions and services is increasingly driven by the rise in high-profile cyber-attacks and data breaches, coupled with stringent regulatory frameworks like CCPA and evolving privacy laws. Trends such as the accelerated digital transformation across industries, widespread adoption of remote work, and the proliferation of IoT devices heighten the need for robust identity security measures. ISPM solutions offer a comprehensive approach to managing and securing identities by providing automated, real-time monitoring and risk mitigation, safeguarding sensitive data, ensuring regulatory compliance, and fostering consumer trust in a region heavily focused on data privacy and security.

Breakdown of primaries

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C-level – 40% and Managerial and Other Levels – 60%

By Region: North America – 20%, Europe – 35%, and Asia Pacific – 45%

Major vendors in the ISPM market include Microsoft (US), Cisco (US), Oracle (US),

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Palo Alto Networks (US), Check Point (US), Okta (US), CrowdStrike (US), Trend Micro (Japan), CyberArk (US), Ping Identity (US), SailPoint (US), BeyondTrust (US), ManageEngine (US), Delinea (US), Silverfort (Israel), Veza (US), One Identity (US), Radiant Logic (US), PlainID (Israel), Zilla Security (US), Adaptive Shield (Israel), AuthMind (US), Grip Security (Israel), Mesh Security (US), Rezonate (US), and Sharelock (Italy).

The study includes an in-depth competitive analysis of the key players in the ISPM market, their company profiles, recent developments, and key market strategies.

Research Coverage

The report segments the ISPM market. It forecasts its size by Offering (Solutions (Identity and Access Management (IAM) Integration, Privileged Access Management (PAM) Integration, and Identity Analytics and Risk Intelligence and Services), Deployment Mode (On-premises and Cloud), Organization Size (Large Enterprises and Small and Medium Enterprises (SMEs)), Vertical (Banking, Financial Services, and Insurance (BFSI), Retail & eCommerce, Government & Defense, Gaming & Gambling, IT & ITeS, Telecom, Energy & Utilities, Education, Healthcare & Life Sciences, and Other Verticals) and Region (North America, Europe, Asia Pacific, Middle East & Africa and Latin America).

The study also includes an in-depth competitive analysis of the market's key players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall ISPM market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (increasing frequency of identity-based attacks, rising demand for zero trust security model, increasing focus of organizations toward

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meeting regulatory compliances, and growing trend witnessed toward cloud-based services), restraints (privacy concerns in ISPM adoption and complexity in integrating ISPM with existing IT infrastructure), opportunities (increasing adoption of the hybrid deployment type and advancements in AI and ML), and challenges (lack of skilled cybersecurity professionals and difficulties addressing the complexity of advanced threats)

Product Development/Innovation: Detailed insights on upcoming technologies, research development activities, new products, and service launches in the ISPM market.

Market Development: Comprehensive information about lucrative markets – the report analyses the ISPM market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and investments in the ISPM market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players Microsoft (US), Cisco (US), Oracle (US), Palo Alto Networks (US), Check Point (US), Okta (US), CrowdStrike (US), Trend Micro (Japan), CyberArk (US), Ping Identity (US), SailPoint (US), BeyondTrust (US), ManageEngine (US), Delinea (US), Silverfort (Israel), Veza (US), One Identity (US), Radiant Logic (US), PlainID (Israel), Zilla Security (US), Adaptive Shield (Israel), AuthMind (US), Grip Security (Israel), Mesh Security (US), Rezonate (US), and Sharelock (Italy) among others, in the ISPM market strategies.

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Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES
1.2 MARKET DEFINITION
  1.2.1 INCLUSIONS AND EXCLUSIONS
1.3 STUDY SCOPE
  1.3.1 MARKET SEGMENTATION
  1.3.2 REGIONS COVERED
1.4 YEARS CONSIDERED
1.5 CURRENCY CONSIDERED
1.6 STAKEHOLDERS
  1.6.1 IMPACT OF RECESSION

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA
  2.1.1 SECONDARY DATA
  2.1.2 PRIMARY DATA
    2.1.2.1 Breakup of primary profiles
    2.1.2.2 Key insights from industry experts
2.2 DATA TRIANGULATION
2.3 MARKET SIZE ESTIMATION
  2.3.1 TOP-DOWN APPROACH
  2.3.2 BOTTOM-UP APPROACH
2.4 MARKET FORECAST
2.5 RESEARCH ASSUMPTIONS
2.6 LIMITATIONS AND RISK ASSESSMENT

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR IDENTITY SECURITY POSTURE MANAGEMENT MARKET PLAYERS
4.2 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY OFFERING
4.3 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY SOLUTION
4.4 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY SERVICE

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4.5 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY DEPLOYMENT MODE
4.6 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY ORGANIZATION SIZE
4.7 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY VERTICAL
4.8 IDENTITY SECURITY POSTURE MANAGEMENT MARKET: REGIONAL ANALYSIS

5 MARKET OVERVIEW AND INDUSTRY TRENDS

5.1 INTRODUCTION
5.2 MARKET DYNAMICS
5.2.1 DRIVERS
5.2.1.1 Increasing frequency of identity-based attacks
5.2.1.2 Rising demand for ‘Zero Trust Security Model’
5.2.1.3 Increasing focus of organizations toward meeting regulatory compliances
5.2.1.4 Growing trend witnessed toward cloud-based services
5.2.2 RESTRAINTS
5.2.2.1 Privacy concerns in ISPM adoption
5.2.2.2 Complexity in integrating ISPM into existing IT infrastructure
5.2.3 OPPORTUNITIES
5.2.3.1 Increasing adoption of hybrid deployment
5.2.3.2 Advancements in AI & ML
5.2.4 CHALLENGES
5.2.4.1 Lack of skilled cybersecurity professionals
5.2.4.2 Complexity of advanced threats
5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES
5.4 PRICING ANALYSIS
5.4.1 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY OFFERING
5.4.2 INDICATIVE PRICING ANALYSIS, BY VENDOR
5.5 VALUE CHAIN ANALYSIS
5.5.1 OFFERINGS
5.5.2 PLANNING & DESIGNING
5.5.3 INFRASTRUCTURE DEPLOYMENT
5.5.4 SYSTEM INTEGRATION
5.5.5 CONSULTATION
5.6 ECOSYSTEM
5.7 TECHNOLOGY ANALYSIS
5.7.1 KEY TECHNOLOGIES

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5.7.1.1 ML and AI
5.7.2 COMPLEMENTARY TECHNOLOGIES
5.7.2.1 Big data analytics
5.7.2.2 Biometric authentication
5.7.3 ADJACENT TECHNOLOGIES
5.7.3.1 Endpoint security
5.7.3.2 Cloud security
5.8 PATENT ANALYSIS
5.8.1 LIST OF MAJOR PATENTS
5.9 KEY CONFERENCES & EVENTS, 2024–2025
5.10 REGULATORY LANDSCAPE
5.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
5.11 PORTER’S FIVE FORCES ANALYSIS
5.11.1 THREAT OF NEW ENTRANTS
5.11.2 THREAT OF SUBSTITUTES
5.11.3 BARGAINING POWER OF SUPPLIERS
5.11.4 BARGAINING POWER OF BUYERS
5.11.5 INTENSITY OF COMPETITIVE RIVALRY
5.12 KEY STAKEHOLDERS & BUYING CRITERIA
5.12.1 KEY STAKEHOLDERS IN BUYING PROCESS
5.12.2 BUYING CRITERIA
5.13 INVESTMENT LANDSCAPE
5.14 BEST PRACTICES IN IDENTITY SECURITY POSTURE MANAGEMENT MARKET
5.15 CASE STUDY ANALYSIS
5.15.1 GLOBE TELECOM COLLABORATED WITH SAILPOINT TO ENHANCE EFFICIENCY OF ONBOARDING PROCESSES AND FACILITATE SEAMLESS USER EXPERIENCE
5.15.2 OKTA’S ADVANCED SERVER ACCESS ASSISTED ZOOM VIDEO COMMUNICATIONS IN ENHANCING SECURITY, SIMPLIFYING COMPLIANCE, AND IMPROVING OPERATIONAL EFFICIENCY
5.15.3 CHICO UNIFIED SCHOOL DISTRICT SECURED 21 SCHOOLS, 12,000 STUDENTS, AND MORE THAN 23,000 DEVICES USING CYBERARK IDENTITY SECURITY PLATFORM

6 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY OFFERING

6.1 INTRODUCTION

+44 20 8123 2220
info@marketpublishers.com

6.1.1 OFFERINGS: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
6.2 SOLUTIONS
6.2.1 NEED FOR ENHANCING VISIBILITY INTO IDENTITY WEAK SPOTS AND REDUCING RISKS TO INFRASTRUCTURE TO DRIVE ADOPTION OF ISPM SOLUTIONS
6.2.2 IDENTITY & ACCESS MANAGEMENT (IAM) INTEGRATION
6.2.3 PRIVILEGED ACCESS MANAGEMENT (PAM) INTEGRATION
6.2.4 IDENTITY ANALYTICS & RISK INTELLIGENCE
6.3 SERVICES
6.3.1 DEMAND FOR ENHANCED SECURITY POSTURE TO DRIVE GROWTH OF ISPM SERVICES
6.3.2 PROFESSIONAL SERVICES
6.3.3 MANAGED SERVICES

7 IDENTITY SECURITY POSTURE MANAGEMENT MARKET,

BY ORGANIZATION SIZE
7.1 INTRODUCTION
7.1.1 ORGANIZATION SIZES: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
7.2 LARGE ENTERPRISES
7.2.1 NEED FOR PROTECTING ENTERPRISES AGAINST SOPHISTICATED IDENTITY THREATS TO DRIVE MARKET
7.3 SMALL & MEDIUM-SIZED ENTERPRISES (SMES)
7.3.1 RISING NEED TO PROTECT APPLICATIONS FROM VULNERABILITIES AND IDENTITY ATTACKS AND ENHANCE SECURITY POSTURE TO BOOST GROWTH

8 IDENTITY SECURITY POSTURE MANAGEMENT MARKET,

BY DEPLOYMENT MODE
8.1 INTRODUCTION
8.1.1 DEPLOYMENT MODES: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
8.2 ON-PREMISES
8.2.1 NEED FOR DIRECT CONTROL OVER ORGANIZATIONAL SECURITY INFRASTRUCTURE TO BOOST ON-PREMISES DEPLOYMENT OF ISPM SOLUTIONS
8.3 CLOUD

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8.3.1 WITH CLOUD DEPLOYMENT, ORGANIZATIONS CAN RAPIDLY SCALE THEIR ISPM SOLUTIONS WITHOUT HIGH UPFRONT INFRASTRUCTURE COSTS

9 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY VERTICAL

9.1 INTRODUCTION
9.1.1 VERTICALS: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
9.2 BFSI
9.2.1 ADVANCEMENTS IN BANKING SERVICES TO SPUR DEMAND FOR ISPM SOLUTIONS
9.3 RETAIL & ECOMMERCE
9.3.1 RAPID GROWTH OF ONLINE TRANSACTIONS AND DIGITAL INTERACTIONS TO BOOST DEMAND FOR ISPM SOLUTIONS
9.4 GOVERNMENT & DEFENSE
9.4.1 EMPHASIS ON EMPLOYING ADVANCED IDENTITY SECURITY AND AI-DRIVEN ANALYTICS TO ENCOURAGE USE OF ISPM SOLUTIONS IN GOVERNMENT & DEFENSE SECTORS
9.5 GAMING & GAMBLING
9.5.1 FOCUS ON SECURING DIGITAL ENTERTAINMENT PLATFORMS AND PREVENTING FRAUD TO DRIVE DEPLOYMENT OF ISPM SOLUTIONS
9.6 IT & ITES
9.6.1 RISING EMPHASIS ON STRENGTHENING CYBERSECURITY POSTURE AND ENSURING COMPLIANCE TO PROPEL USE OF ROBUST ISPM SOLUTIONS
9.7 TELECOM
9.7.1 NEED FOR SAFEGUARDING SUBSCRIBER DATA AND ENSURING SEAMLESS CONNECTIVITY TO SPUR MARKET DEMAND
9.8 ENERGY & UTILITIES
9.8.1 FOCUS ON PROTECTING CRITICAL INFRASTRUCTURE AND ENSURING REGULATORY COMPLIANCE THROUGH ROBUST IDENTITY SECURITY MEASURES TO BOOST GROWTH
9.9 EDUCATION
9.9.1 NEED FOR SAFEGUARDING DIGITAL LEARNING ENVIRONMENTS AND PROTECTING STUDENT DATA WITH ADVANCED IDENTITY GOVERNANCE SOLUTIONS TO DRIVE GROWTH
9.10 HEALTHCARE & LIFE SCIENCES
9.10.1 FOCUS ON PROTECTING PATIENT PRIVACY AND SECURING HEALTH DATA WITH ADVANCED IDENTITY MANAGEMENT AND BIOMETRIC AUTHENTICATION TO SPUR DEMAND

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9.11 OTHER VERTICALS

10 IDENTITY SECURITY POSTURE MANAGEMENT MARKET, BY REGION

10.1 INTRODUCTION
10.2 NORTH AMERICA
10.2.1 NORTH AMERICA: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
10.2.2 NORTH AMERICA: RECESSION IMPACT
10.2.3 US
10.2.3.1 Increasing identity-based cyber threats to drive market
10.2.4 CANADA
10.2.4.1 Government’s focus on improving identity security to fuel demand for ISPM solutions
10.3 EUROPE
10.3.1 EUROPE: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
10.3.2 EUROPE: RECESSION IMPACT
10.3.3 UK
10.3.3.1 Rising cases of identity fraud across financial sector to accelerate market growth
10.3.4 GERMANY
10.3.4.1 Rising need for comprehensive ISPM solutions with shift toward remote work to boost popularity of ISPM
10.3.5 FRANCE
10.3.5.1 Increasing use of digital identities to boost market growth
10.3.6 ITALY
10.3.6.1 Challenges managing digital identities to drive need for ISPM solutions
10.3.7 REST OF EUROPE
10.4 ASIA PACIFIC
10.4.1 ASIA PACIFIC: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
10.4.2 ASIA PACIFIC: RECESSION IMPACT
10.4.3 CHINA
10.4.3.1 Rising importance of safeguarding digital identities in increasingly connected world to fuel market growth
10.4.4 JAPAN
10.4.4.1 Technological advancements and rising cyber threats to drive demand for ISPM solutions

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10.4.5 INDIA
10.4.5.1 Rise in identity-related scams to boost market growth
10.4.6 AUSTRALIA
10.4.6.1 Rise in cases of cyber threats and fraudulent activities to propel adoption of ISPM solutions and services
10.4.7 REST OF ASIA PACIFIC
10.5 MIDDLE EAST & AFRICA
10.5.1 MIDDLE EAST & AFRICA: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
10.5.2 MIDDLE EAST & AFRICA: RECESSION IMPACT
10.5.3 GULF COOPERATION COUNCIL (GCC) COUNTRIES
10.5.3.1 KSA
10.5.3.1.1 Increasing technological advancements in region to boost market
10.5.3.2 UAE
10.5.3.2.1 Evolving regulatory frameworks to fuel market growth
10.5.3.3 Rest of GCC countries
10.5.4 SOUTH AFRICA
10.5.4.1 Mobile banking trend to propel market growth
10.5.5 REST OF MIDDLE EAST & AFRICA
10.6 LATIN AMERICA
10.6.1 LATIN AMERICA: IDENTITY SECURITY POSTURE MANAGEMENT MARKET DRIVERS
10.6.2 LATIN AMERICA: RECESSION IMPACT
10.6.3 BRAZIL
10.6.3.1 Rapid digital transformation to propel growth of ISPM market
10.6.4 MEXICO
10.6.4.1 Increasing digital penetration to amplify demand for ISPM solutions
10.6.5 REST OF LATIN AMERICA

11 COMPETITIVE LANDSCAPE

11.1 KEY PLAYER STRATEGIES/RIGHT TO WIN
11.2 REVENUE ANALYSIS
11.3 MARKET SHARE ANALYSIS
11.4 BRAND COMPARISON
11.5 COMPANY VALUATION AND FINANCIAL METRICS
11.5.1 COMPANY VALUATION
11.5.2 FINANCIAL METRICS USING EV/EBIDTA
11.6 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

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11.6.1 STARS
11.6.2 EMERGING LEADERS
11.6.3 PERVASIVE PLAYERS
11.6.4 PARTICIPANTS
11.6.5 COMPANY FOOTPRINT: KEY PLAYERS, 2023
11.6.5.1 Company footprint
11.6.5.2 Solution footprint
11.6.5.3 Vertical footprint
11.6.5.4 Regional footprint
11.7 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023
11.7.1 PROGRESSIVE COMPANIES
11.7.2 RESPONSIVE COMPANIES
11.7.3 DYNAMIC COMPANIES
11.7.4 STARTING BLOCKS
11.7.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023
11.7.5.1 Detailed list of key startups/SMEs
11.7.5.2 Competitive benchmarking of key startups/SMEs
11.8 COMPETITIVE SCENARIO
11.8.1 PRODUCT LAUNCHES
11.8.2 DEALS

12 COMPANY PROFILES

12.1 KEY PLAYERS
12.1.1 MICROSOFT
12.1.1.1 Business overview
12.1.1.2 Products/Solutions/Services offered
12.1.1.3 Recent developments
12.1.1.4 MnM view
12.1.1.4.1 Right to win
12.1.1.4.2 Strategic choices made
12.1.1.4.3 Weaknesses and competitive threats
12.1.2 CISCO
12.1.2.1 Business overview
12.1.2.2 Products/Solutions/Services offered
12.1.2.3 Recent developments
12.1.2.4 MnM view
12.1.2.4.1 Right to win
12.1.2.4.2 Strategic choices made

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12.1.2.4.3 Weaknesses and competitive threats
12.1.3 ORACLE
12.1.3.1 Business overview
12.1.3.2 Products/Solutions/Services offered
12.1.3.3 Recent developments
12.1.3.4 MnM view
12.1.3.4.1 Right to win
12.1.3.4.2 Strategic choices made
12.1.3.4.3 Weaknesses and competitive threats
12.1.4 PALO ALTO NETWORKS
12.1.4.1 Business overview
12.1.4.2 Products/Solutions/Services offered
12.1.4.3 Recent developments
12.1.4.4 MnM view
12.1.4.4.1 Right to win
12.1.4.4.2 Strategic choices made
12.1.4.4.3 Weaknesses and competitive threats
12.1.5 CROWDSTRIKE
12.1.5.1 Business overview
12.1.5.2 Products/Solutions/Services offered
12.1.5.3 Recent developments
12.1.5.4 MnM view
12.1.5.4.1 Right to win
12.1.5.4.2 Strategic choices made
12.1.5.4.3 Weaknesses and competitive threats
12.1.6 CHECK POINT
12.1.6.1 Business overview
12.1.6.2 Products/Solutions/Services offered
12.1.6.3 Recent developments
12.1.6.4 MnM view
12.1.6.4.1 Right to win
12.1.6.4.2 Strategic choices made
12.1.6.4.3 Weaknesses and competitive threats
12.1.7 OKTA
12.1.7.1 Business overview
12.1.7.2 Products/Solutions/Services offered
12.1.7.3 Recent developments
12.1.8 TREND MICRO
12.1.8.1 Business overview

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12.1.8.2 Products/Solutions/Services offered
12.1.9 CYBERARK
12.1.9.1 Business overview
12.1.9.2 Products/Solutions/Services offered
12.1.9.3 Recent developments
12.1.10 PING IDENTITY
12.1.10.1 Business overview
12.1.10.2 Products/Solutions/Services offered
12.1.10.3 Recent developments
12.1.11 SAILPOINT
12.1.11.1 Business overview
12.1.11.2 Products/Solutions/Services offered
12.1.11.3 Recent developments
12.1.12 BEYONDTRUST
12.1.12.1 Business overview
12.1.12.2 Products/Solutions/Services offered
12.1.12.3 Recent developments
12.1.13 MANAGEENGINE
12.1.13.1 Business overview
12.1.13.2 Products/Solutions/Services offered
12.1.13.3 Recent developments
12.2 OTHER PLAYERS
12.2.1 MESH SECURITY
12.2.1.1 Business overview
12.2.1.2 Products/Solutions/Services offered
12.2.1.3 MnM view
12.2.1.3.1 Right to win
12.2.1.3.2 Strategic choices made
12.2.1.3.3 Weaknesses and competitive threats
12.2.2 DELINEA
12.2.3 SILVERFORT
12.2.4 VEZA
12.2.5 ONE IDENTITY
12.2.6 RADIANT LOGIC
12.2.7 PLAINID
12.2.8 ZILLA SECURITY
12.2.9 ADAPTIVE SHIELD
12.2.10 AUTHMIND
12.2.11 GRIP SECURITY

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12.2.12 REZONATE
12.2.13 SHARELOCK

13 ADJACENT MARKETS

13.1 INTRODUCTION TO ADJACENT MARKETS
13.1.1 LIMITATIONS
13.2 IDENTITY AND ACCESS MANAGEMENT (IAM) MARKET
13.3 PRIVILEGED ACCESS MANAGEMENT (PAM) MARKET

14 APPENDIX

14.1 DISCUSSION GUIDE
14.2 KNOWLEDGESTORE: MARKETSANDMARKETS’ SUBSCRIPTION PORTAL
14.3 CUSTOMIZATION OPTIONS
14.4 RELATED REPORTS
14.5 AUTHOR DETAILS

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