

Workload Identity in Multi System Environments
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A. Schwenkschuster
SPIRL
Y. Rosomakho
Zscaler
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Workload Identity Practices
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Abstract

This document describes industry practices for providing secure identities to workloads in container orchestration, cloud platforms, and other workload platforms. It explains how workloads obtain credentials for external authentication purposes, without managing long-lived secrets directly. It does not take into account the standards work in progress for the WIMSE architecture [I-D.ietf-wimse-arch] and other protocols, such as [I-D.ietf-wimse-s2s-protocol].

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1. Introduction

Just like people, the workloads inside container orchestration systems (e.g., Kubernetes) need identities to authenticate with other systems, such as databases, web servers, or other workloads. The challenge for workloads is to obtain a credential that can be used to authenticate with these resources without managing secrets directly, for instance, an OAuth 2.0 access token.

The common use of the OAuth 2.0 framework [RFC6749] in this context poses challenges, particularly in managing credentials. To address this, the industry has shifted to a federation-based approach where credentials of the underlying workload platform are used to authenticate to other identity providers, which in turn, issue credentials that grant access to resources.

Traditionally, workloads were provisioned with client credentials and used for example the corresponding client credential flow (Section 1.3.4 [RFC6749]) to retrieve an OAuth 2.0 access token. This model presents a number of security and maintenance issues. Secret materials must be provisioned and rotated, which requires either automation to be built, or periodic manual effort. Secret materials can be stolen and used by attackers to impersonate the workload. Other, non OAuth 2.0 flows, such as direct API keys or other secrets, suffer from the same issues.

Instead of provisioning secret material to the workload, one solution to this problem is to attest the workload by using its underlying platform. Many platforms provision workloads with a credential, such as a JWT ([RFC7519]). Cryptographically signed by the platform's issuer, this credential attests the workload and its attributes.

Figure 1 illustrates a generic pattern that is seen across many workload platforms, more concrete variations are found in Section 4.

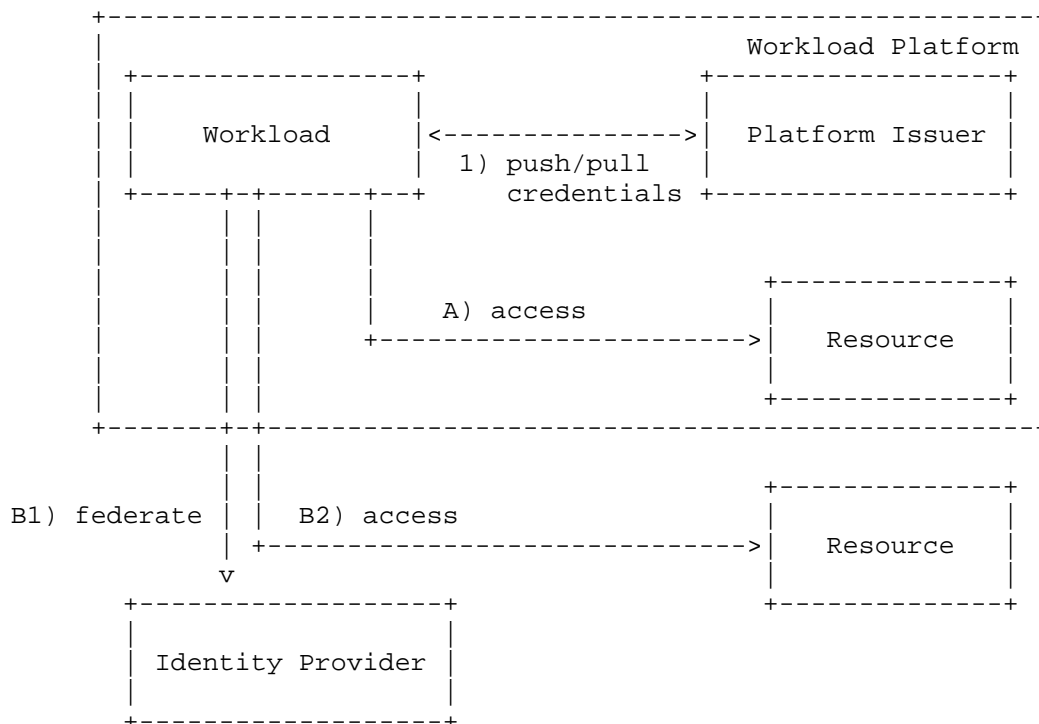


Figure 1: Generic workload identity pattern

The figure outlines the following steps which are applicable in any pattern.

- * 1) Platform issues credential to workload. The way this is achieved varies by platform, for instance, it can be pushed to the workload or pulled by the workload.
- * A) The credential can give the workload direct access to resources within the platform or the platform itself (e.g., to perform infrastructure operations)
- * B1) The workload uses the credential to federate to an Identity Provider. This step is optional and only needed when accessing outside resources.
- * B2) The workload accesses resources outside of the platform and uses the federated identity obtained in the previous step.

Accessing different outside resources may require the workload to repeat steps B1) and B2), federating to multiple Identity Providers. It is also possible that step 1) needs to be repeated, for instance in situations where the platform-issued credential is scoped to accessing a certain resource or federating to a specific Identity Provider.

2. Terminology

The key words "MUST", "MUST NOT", "REQUIRED", "SHALL", "SHALL NOT", "SHOULD", "SHOULD NOT", "RECOMMENDED", "NOT RECOMMENDED", "MAY", and "OPTIONAL" in this document are to be interpreted as described in BCP 14 [RFC2119] [RFC8174] when, and only when, they appear in all capitals, as shown here.

3. Delivery Patterns

Credentials can be provisioned to the workload by different mechanisms, each of which has its own advantages, challenges, and security risks. The following section highlights the pros and cons of common solutions. Security recommendations for these methods are covered in Section 5.1.

3.1. Environment Variables

Injecting the credentials into the environment variables allows for simple and fast deployments. Applications can directly access them through system-level mechanisms, e.g., through the `env` command in Linux. Note that environment variables are static in nature in that they cannot be changed after application initialization.

3.2. Filesystem

Filesystem delivery allows both container secret injection and access control. Many solutions find the main benefit in the asynchronous provisioning of the credentials to the workload. This allows the workload to run independently of the credentials update, and to access them by reading the file.

Credential rotation requires a solution to detect soon-to-expire secrets as a rotation trigger. One practice is that the new secret is renewed before the old secret is invalidated. For example, the solution can choose to update the secret an hour before it is invalidated. This gives applications time to update without downtime.

Because credentials are written to a shared filesystem, the solution is responsible for ensuring atomicity when updating them. Writes SHOULD be performed in a way that prevents workloads from observing a partially written file (for example by writing to a temporary file and renaming it atomically). Solutions SHOULD also perform a flush operation immediately after the update to minimize the chance of race conditions and ensure durability.

3.3. Local APIs

In this pattern, the workload obtains credentials by communicating with a local API exposed by the credential issuer. Implementations commonly use UNIX domain sockets (e.g., SPIFFE), loopback interfaces, or link-local "magic addresses" 169.254.169.254 commonly used for cloud provider Instance Metadata Services as the transport mechanism.

Local APIs support re-provisioning of updated credentials, either on demand or through persistent connections that enable the issuer to push new credentials. This enables the use of short-lived, narrowly scoped credentials, improving security posture compared to long-lived secrets.

The security of this approach relies heavily on network isolation to prevent unauthorised access to the local API. In addition, the pattern requires client-side code, which may introduce portability challenges. The request-response paradigm can also increase latency, particularly when communication goes over the network.

4. Practices

The following practices outline more concrete examples of platforms, including their delivery patterns.

4.1. Kubernetes

In Kubernetes, machine identity is implemented through "service accounts" [KubernetesServiceAccount]. Service accounts can be explicitly created, or a default one is automatically assigned. Service accounts use JSON Web Tokens (JWTs) [RFC7519] as their credential format, with the Kubernetes Control Plane acting as the signer.

Service accounts serve multiple authentication purposes within the Kubernetes ecosystem. They are used to authenticate to Kubernetes APIs, between different workloads and to access external resources. This latter use case is particularly relevant for the purposes of this document.

To programmatically use service accounts, workloads can:

- * Have the token "projected" into the file system of the workload. This is similar to volume mounting in non-Kubernetes environments, and is commonly referred to as "projected service account token".
- * Use the Token Request API [TokenRequestV1] of the control plane. This option, however, requires an initial projected service account token as a means of authentication.

Both options allow workloads to:

- * Specify a custom audience. Possible audiences can be restricted based on policy.
- * Specify a custom lifetime. Maximum lifetime can be restricted by policy.
- * Bind the token lifetime to an object lifecycle. This allows the token to be invalidated when the object is deleted. For example, this may happen when a Kubernetes Deployment is removed from the server. Note that invalidation is only detected when the Token Review API [TokenReviewV1] of Kubernetes is used to validate the token.

To validate service account tokens, Kubernetes allows workloads to:

- * Make use of the Token Review API [TokenReviewV1]. This API introspects the token, makes sure it hasn't been invalidated and returns the claims.
- * Mount the public keys used to sign the tokens into the file system of the workload. This allows workloads to validate a token's signature without calling the Token Review API.
- * Optionally, a JSON Web Key Set [RFC7517] is exposed via a web server. This allows the Service Account Token to be validated outside of the cluster and access to the actual Kubernetes Control Plane API.

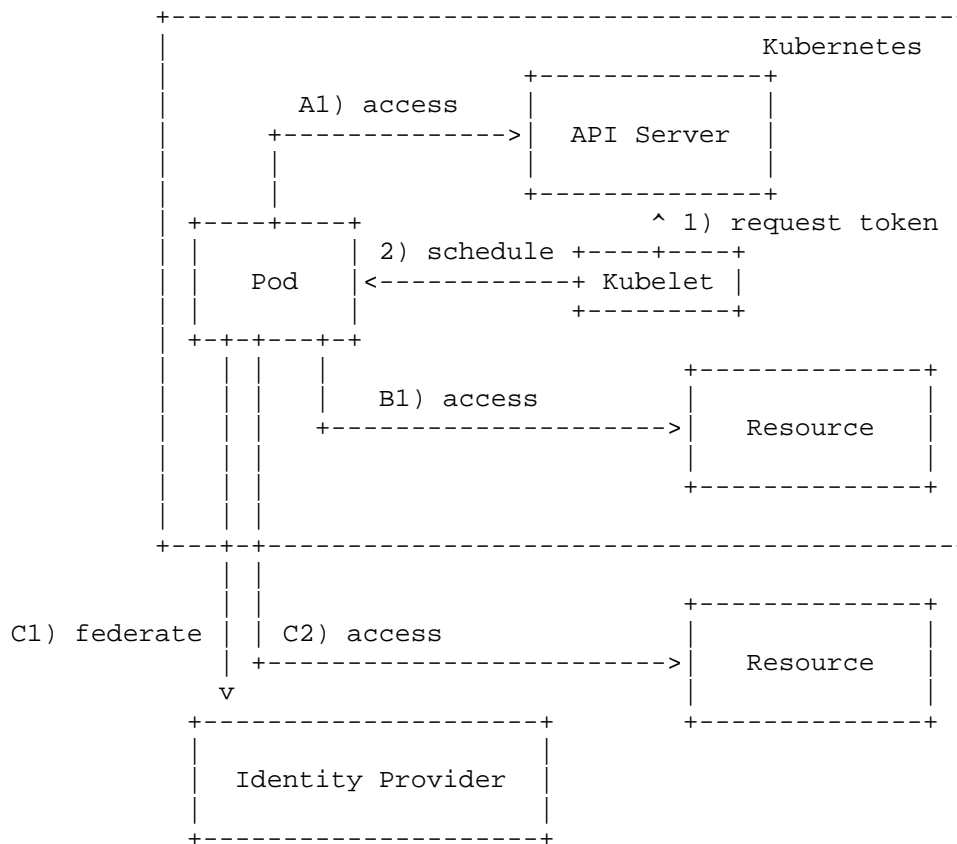


Figure 2: Kubernetes workload identity in practice

The steps shown in Figure 2 are:

- * 1) The kubelet is tasked to schedule a Pod. Based on configuration, it requests a Service Account Token from the Kubernetes API server.
- * 2) The kubelet starts the Pod and, based on the configuration of the Pod, delivers the token to the containers within the Pod.

Now, the Pod can use the token to:

- * A) Access the Kubernetes Control Plane, considering it has access to it.
- * B) Access other resources within the cluster, for instance, other Pods.

- * C) Access resources outside of the cluster:
 - C1) The application within the Pod uses the Service Account Token to federate to an Identity Provider outside of the Kubernetes Cluster.
 - C2) Using the federated identity, the application within the Pod accesses resources outside of the cluster.

As an example, the following JSON illustrates the claims contained in a Kubernetes Service Account token.

```
{
  "aud": [ # matches the requested audiences, or the API server's default audiences when none are explicitly requested
    "https://kubernetes.default.svc"
  ],
  "exp": 1731613413,
  "iat": 1700077413,
  "iss": "https://kubernetes.default.svc", # matches the first value passed to the --service-account-issuer flag
  "jti": "ea28ed49-2e11-4280-9ec5-bc3d1d84661a", # ServiceAccountTokenJTI feature must be enabled for the claim to be present
  "kubernetes.io": {
    "namespace": "my-namespace",
    "node": { # ServiceAccountTokenPodNodeInfo feature must be enabled for the API server to add this node reference claim
      "name": "127.0.0.1",
      "uid": "58456cb0-dd00-45ed-b797-5578fdceaced"
    },
    "pod": {
      "name": "my-workload-69cbfb9798-jv9gn",
      "uid": "778a530c-b3f4-47c0-9cd5-ab018fb64f33"
    },
    "serviceaccount": {
      "name": "my-workload",
      "uid": "a087d5a0-e1dd-43ec-93ac-f13d89cd13af"
    },
    "warnafter": 1700081020
  },
  "nbf": 1700077413,
  "sub": "system:serviceaccount:my-namespace:my-workload"
}
```

Figure 3: Example Kubernetes Service Account Token claims

4.2. Secure Production Identity Framework For Everyone (SPIFFE)

The Secure Production Identity Framework For Everyone, also known as SPIFFE [SPIFFE], is a Cloud Native Computing Foundation (CNCF) project that defines a "Workload API" to deliver machine identity to workloads. Workloads can retrieve either X.509 certificates or JWTs. The Workload API does not require clients to authenticate themselves. Instead, implementation collect identifying information of the workload from the environment, such as the workload platform or the operating system.

SPIFFE refers to the JWT-formatted credential as a "JWT-SVID" (JWT - SPIFFE Verifiable Identity Document) and the X509-formatted credential as "X509-SVID".

Workloads are required to specify at least one audience when requesting a JWT-SVID from the Workload API.

For validation, SPIFFE offers:

- * A set of public keys encoded in JWK format [RFC7517] retrieved from the Workload API that can be used to validate signatures. In SPIFFE this is referred to as the "trust bundle".
- * An endpoint where the public keys used for signing are published in JWK format [RFC7517]. See SPIFFE Bundle Endpoint at [SPIFFE].

The following figure illustrates how a workload can use its JWT-SVID to access a protected resource outside of SPIFFE:

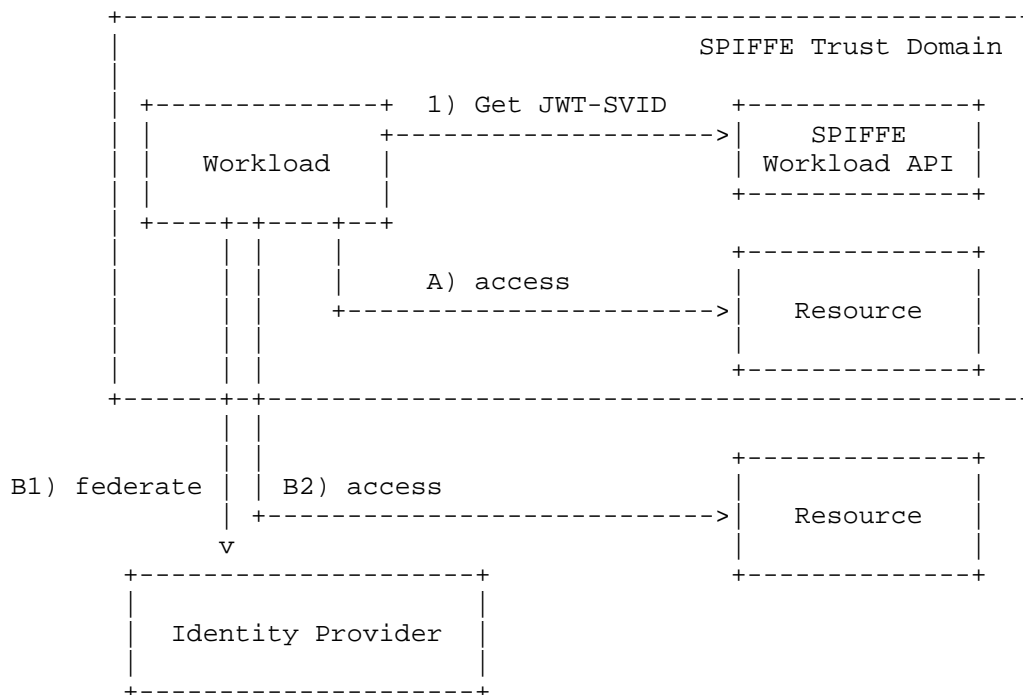


Figure 4: Workload identity in SPIFFE

The steps shown in Figure 4 are:

- * 1) The workload requests a JWT-SVID from the SPIFFE Workload API.
- * A) The JWT-SVID can be used to directly access resources or other workloads within the same SPIFFE Trust Domain.
- * B1) To access resources protected by other Identity Providers, the workload uses the SPIFFE JWT-SVID to federate to the Identity Provider.
- * B2) Once federated, the workload can access resources outside of its trust domain.

Here are example claims for a JWT-SVID:

```
{
  "aud": [
    "external-authorization-server"
  ],
  "exp": 1729087175,
  "iat": 1729086875,
  "sub": "spiffe://example.org/myservice"
}
```

4.3. Cloud Providers

Workloads in cloud platforms can have any shape or form. Historically, virtual machines were the most common. The introduction of containerization brought hosted container environments or Kubernetes clusters. Containers have evolved into serverless offerings. Regardless of the actual workload packaging, distribution, or runtime platform, all these workloads need identities.

The biggest cloud providers have established the pattern of an "Instance Metadata Endpoint". Aside from allowing workloads to retrieve metadata about themselves, it also allows them to receive identity. The credential types offered can vary. JWT, however, is the one that is common across all of them. The issued credential provides proof to anyone it is being presented to that the workload platform has attested the workload and it can be considered authenticated.

Within a cloud provider, the issued credential can often directly be used to access resources of any kind across the platform, making integration between the services straightforward. From the workload perspective, no credential needs to be issued, provisioned, rotated or revoked, as everything is handled internally by the platform.

This is not true for resources outside of the platform, such as on-premise resources, generic web servers or other cloud provider resources. Here, the workload first needs to federate to the Secure Token Service (STS) of the respective cloud, which is effectively an Identity Provider. The STS issues a new credential with which the workload can then access resources.

This pattern also applies when accessing resources in the same cloud but across different security boundaries (e.g., different account or tenant). The actual flows and implementations may vary in these situations though.

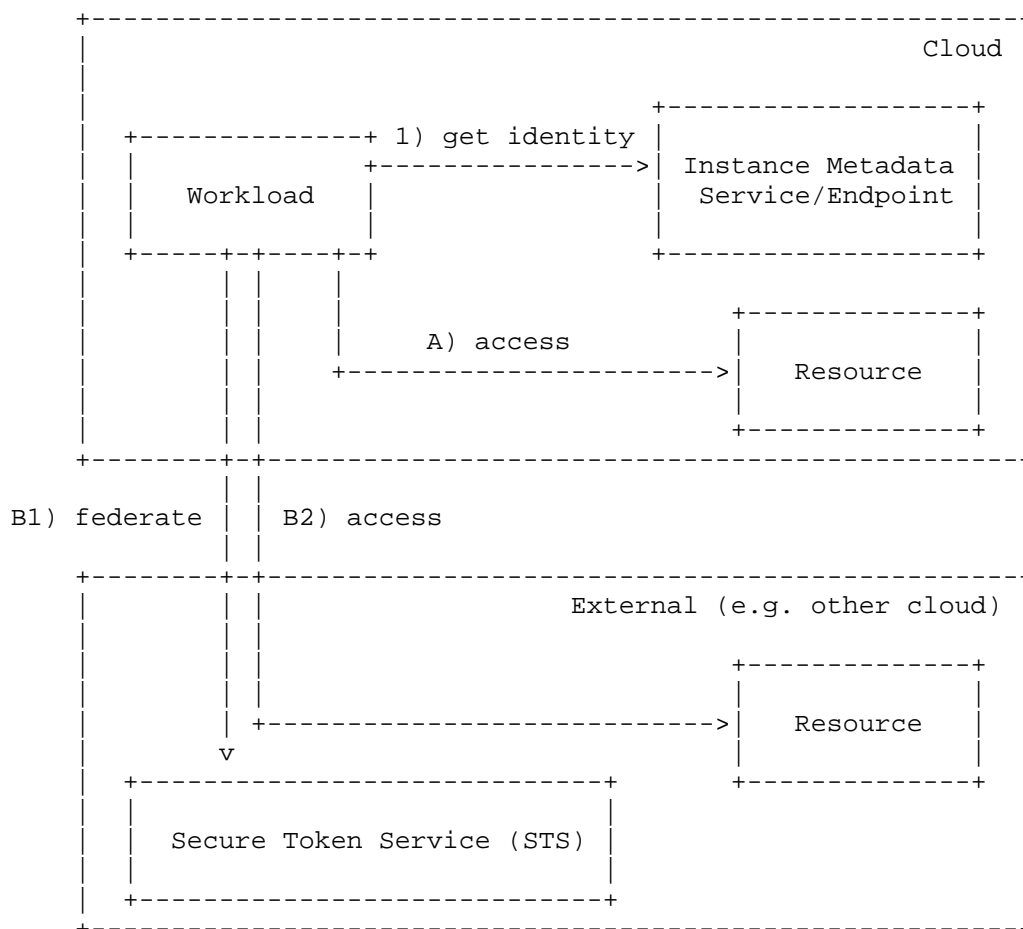


Figure 5: Workload identity in a cloud provider

The steps shown in Figure 5 are:

- * 1) The workload retrieves an identity from the Instance Metadata Service or Endpoint. This endpoint exposes an API and is available at a well-known, but local-only location such as 169.254.169.254.

When the workload needs to access a resource within the cloud (e.g., located in the same security boundary; protected by the same issuer as the workload identity):

- * A) The workload directly accesses the protected resource with the credential issued in Step 1.

When the workload needs to access a resource outside of the cloud (e.g., different cloud; same cloud, but different security boundary):

- * B1) The workload uses the cloud-issued credential to federate to the Secure Token Service of the other cloud/account.
- * B2) Using the federated identity, the workload can access the resource outside, assuming the federated identity has the necessary permissions.

4.4. Continuous Integration and Deployment Systems

Continuous integration and deployment (CI-CD) systems allow their pipelines (or workflows) to receive an identity at runtime. It is a common task to upload build outputs and other artifacts to external resources. For this, federation to external Identity Providers is often necessary.

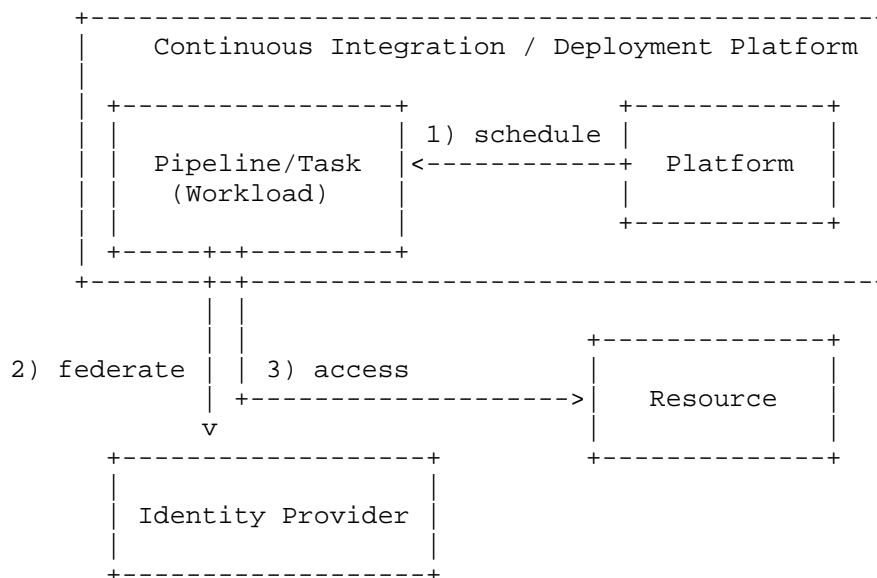


Figure 6: OAuth2 Assertion Flow in a continuous integration/deployment environment

The steps shown in Figure 6 are:

- * 1) The CI-CD platform schedules a workload (pipeline or task). Based on configuration, a Workload Identity is made available by the platform.

- * 2) The workload uses the identity to federate to an Identity Provider.
- * 3) The workload uses the federated identity to access resources. For instance, an artifact store to upload compiled binaries, or to download libraries needed to resolve dependencies. It is also common to access actual infrastructure as resources to make deployments or changes to it.

While token structure is vendor-specific, all tokens contain claims carrying the basic context of the executed tasks, such as source code management data such as git branch, initiation context and more.

4.5. Service Meshes

Service meshes provide infrastructure-level workload identity and secure communication for applications through sidecar proxies deployed alongside each workload. In a service mesh, workload identity is typically implemented using X.509 certificates issued by the service mesh. Service meshes handle identity credential provisioning to sidecar proxies rather than directly to application workloads. The sidecar intercepts network traffic and handles authentication transparently to the application code.

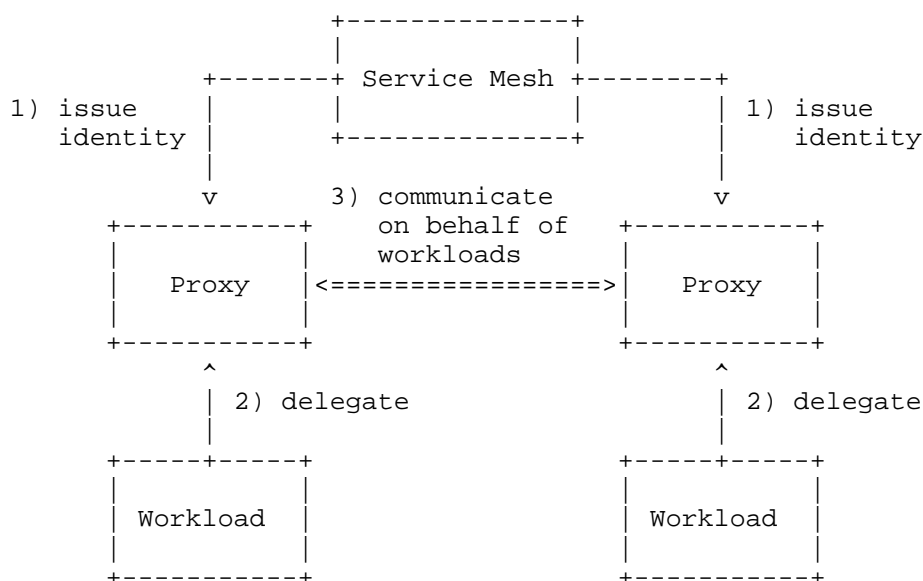


Figure 7: Simple service mesh communication between 2 workload

The steps shown in Figure 7 are:

- * 1) The Service Mesh issues identities in the form of credentials to proxies.
- * 2) The proxies act on behalf of workloads that delegate their communication to them. In above figure each workload has its own proxy that solely represents it and no other workload.
- * 3) The proxies communicate with each other on behalf of the workloads they represent. This communication includes authentication specs, for instance in the form of X.509 certificates.

In above pattern each workload has a specific sidecar. An alternative deployment is to share proxies between workloads. This often results in a single proxy on each node acting on behalf of all workloads on the node.

5. Security Considerations

All security considerations in section 8 of [RFC7521] apply.

5.1. Credential Delivery

5.1.1. Environment Variables

Leveraging environment variables to provide credentials presents many security limitations. Environment variables have a wide set of use cases and are observed by many components. They are often captured for monitoring, observability, debugging and logging purposes and sent to components outside of the workload. Access control is not trivial and does not achieve the same security results as other methods.

This approach should be limited to non-production cases where convenience outweighs security considerations, and the provided secrets are limited in validity or utility. For example, an initial secret might be used during the setup of the application.

5.1.2. Filesystem

- * 1) Access control to the mounted file should be configured to limit reads to authorized applications. Linux supports solutions such as DAC (uid and gid) or MAC (e.g., SELinux, AppArmor).
- * 2) Mounted shared memory should be isolated from other host OS paths and processes. For example, on Linux this can be achieved by using namespaces.

5.1.3. Local APIs

Local APIs often operate in clear-text such as unencrypted HTTP without any confidentiality or integrity protection. Privileged component on the machine or in the infrastructure can be able to eyes-drop the connection and the credential within it.

Mitigating measures are required to mitigate a particular variant of Server-Side Request Forgery attacks against local APIs. For example, requiring a specific header that cannot be controlled externally or preventing the use of link-local IPs, including through redirects.

Adequate attestation is required to make sure unauthorized access is denied and credentials are not issued to other parties when the Local API is unauthenticated. Introspection of the platform, like in SPIFFE or cloud providers, can be used to identify workloads and grant access. The more fine-grained and strict the attestation, the smaller the attack surface. For instance, allowing access by IP or other machine-global identifiers permits any process to receive the identity, while including user ID or other process-scoped identifiers prevents this broader access.

The potential for denial-of-service attacks against Local APIs need to be taken into account and protective measures should be implemented. Depending on the platform these attacks can affect other workloads and their ability to receive a platform credential.

5.2. Token typing

Issuers SHOULD strongly type the issued tokens to workloads via the JOSE typ header and Identity Providers accepting these tokens SHOULD validate the value of it according to policy. See Section 3.1 of [RFC8725] for details on explicit typing.

Issuers SHOULD use authorization-grant+jwt as a typ value according to [I-D.ietf-oauth-rfc7523bis]. For broad support, JWT or JOSE MAY be used by issuers and accepted by authorization servers but it is important to highlight that a wide range of tokens, meant for all sorts of purposes, use these values and would be accepted.

5.3. Custom claims are important for context

Some platform-issued credentials have custom claims that are vital for context and are required to be validated. For example, in a continuous integration and deployment platform where a workload is scheduled for a Git repository, the branch is crucial. A "main" branch may be protected and considered trusted to federate to external authorization servers. But other branches may not be

allowed to access protected resources.

Authorization servers that validate assertions SHOULD make use of these claims. Platform issuers SHOULD allow differentiation based on the subject claim alone.

5.4. Token lifetime

Tokens SHOULD NOT exceed the lifetime of the workloads they represent. For example, a workload that has an expected lifetime of one hour should not receive a token valid for two hours or more.

Within the scope of this document, where a platform-issued credential is used to authenticate to retrieve an access token for an external authorization domain, short-lived credentials are recommended.

5.5. Workload lifecycle and invalidation

Platform issuers SHOULD invalidate tokens when the workload stops, pauses, or ceases to exist and SHOULD offer validators a mechanism to query this status. How these credentials are invalidated and the status is queried varies and is not in scope of this document.

5.6. Proof of possession

Credentials SHOULD be bound to workloads, and proof of possession SHOULD be performed when these credentials are used. This mitigates token theft. This proof of possession applies to both the platform credential and the access token of the external authorization domains.

5.7. Audience

For issued credentials in the form of JWTs, they MUST be audienced using the aud claim. Each JWT SHOULD only carry a single audience. We RECOMMEND using URIs to specify audiences. See Section 3 of [RFC8707] for more details and security implications.

Some workload platforms provide credentials for interacting with their own APIs (e.g., Kubernetes). These credentials MUST NOT be used beyond the platform API. In the example of Kubernetes, a token used for anything other than the Kubernetes API itself MUST NOT carry the Kubernetes server in the aud claim.

5.8. Multi-Tenancy Considerations

In multi-tenant platforms, relying parties MUST carefully evaluate which attributes are considered trustworthy when making authorization decisions. Access or federation MUST NOT be granted based solely on untrusted or easily forgeable attributes. In particular, the issuer claim in such environments may not uniquely identify a trusted authority, since each tenant could be configured with the same issuer identifier.

Relying parties SHOULD ensure that attributes used for authorization are bound to a trust domain under their control or validated by an entity with a clearly defined trust boundary.

6. IANA Considerations

This document does not require actions by IANA.

7. Acknowledgements

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[TokenRequestV1]

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[TokenReviewV1]

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Appendix A. Variations

A.1. Direct access to protected resources

Resource servers that protect resources may choose to trust multiple authorization servers, including the one that issues the platform identities. Instead of using the platform-issued identity to receive an access token of a different authorization domain, workloads can directly use the platform-issued identity to access a protected resource.

In this case, technically, the protected resource and workload are part of the same authorization domain.

A.2. Custom assertion flows

While [RFC7521] and [RFC7523] are the proposed standards for this pattern, some authorization servers use [RFC8693] or a custom API for the issuance of an access token based on existing platform identity credentials. These patterns are not recommended and prevent interoperability.

Appendix B. Document History

[[To be removed from the final specification]]

-03

- * Add service-mesh section
- * Add multi-tenancy considerations
- * Add atomicity and flushing requirements to filesystem section
- * Make it clear that invalidation is a matter of querying the status
- * Rework local api section & security considerations
- * Refer to RFC7517 in SPIFFE and add clarity on key distribution
- * Editorial changes

-02

- * Updated structure, bringing concrete examples back into the main text.
- * Use more generic "federation" term instead of RFC 7523 specifics.
- * Overall editorial improvements.

- * Fix reference of Kubernetes Token Request API
- * Prefer the term "document" over "specification".
- * Update contributor and acknowledgements sections.
- * Remove section about OIDC as it is too specific to a certain implementation.
- * Rewrite abstract to better reflect the current content of the document.

-01

- * Add credential delivery mechanisms
- * Highlight relationship to other WIMSE work
- * Add details about token typing and relation to OpenID Connect
- * Add security considerations for audience

-00

- * Rename draft with no content changes.
 - * Set Arndt to Editor role.
- *[as draft-wimse-workload-identity-bcp]*

-02

- * Move scope from Kubernetes to generic workload identity platform
- * Add various patterns to appendix
 - Kubernetes
 - Cloud providers
 - SPIFFE
 - CI/CD
- * Add some security considerations
- * Update title

-01

* Editorial updates

-00

* Adopted by the WIMSE WG

Contributors

Benedikt Hofmann
Siemens
Email: hofmann.benedikt@siemens.com

Hannes Tschofenig
Siemens
Email: hannes.tschofenig@gmx.net

Edoardo Giordano
Nokia
Email: edoardo.giordano@nokia.com

Authors' Addresses

Arndt Schwenkschuster
SPIRL
Email: arndts.ietf@gmail.com

Yaroslav Rosomakho
Zscaler
Email: yrosomakho@zscaler.com