



The Emerging Mobile Biometrics Market Landscape



This Biometrics UnPlugged Webinar is brought to you by
Acuity Market Intelligence, findBIOMETRICS, and Mobile ID World

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findBIOMETRICS Webinar
November 13, 2013

About Acuity Market Intelligence

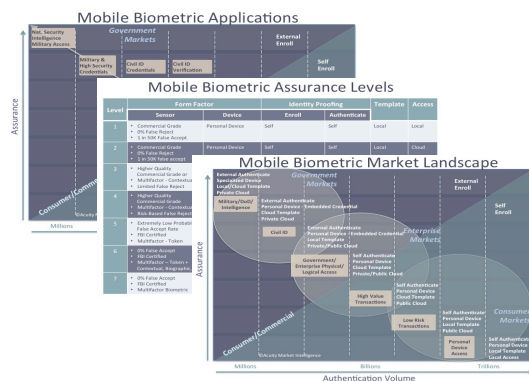
Acuity consistently delivers *thought-provoking, hype-free, data-driven* insight and analysis

- Strategic Research Consultancy Founded in 2001
- Focus on Identity including biometrics, mobility, eIDs, border control, eGates
- Proven record of accurately forecasting market trends
- Research Reports on Biometrics, ePassports and eVisas, and National IDs
- **NEW REPORT on Automated Border Control: eGates - January 2014**
- **NEW REPORT on Biometrics and Mobility – February 2014**



Today's Discussion

- Why We Are Here?
- What's Driving the Mobile Biometrics Marketplace?
- Modeling the Mobile Biometrics Market



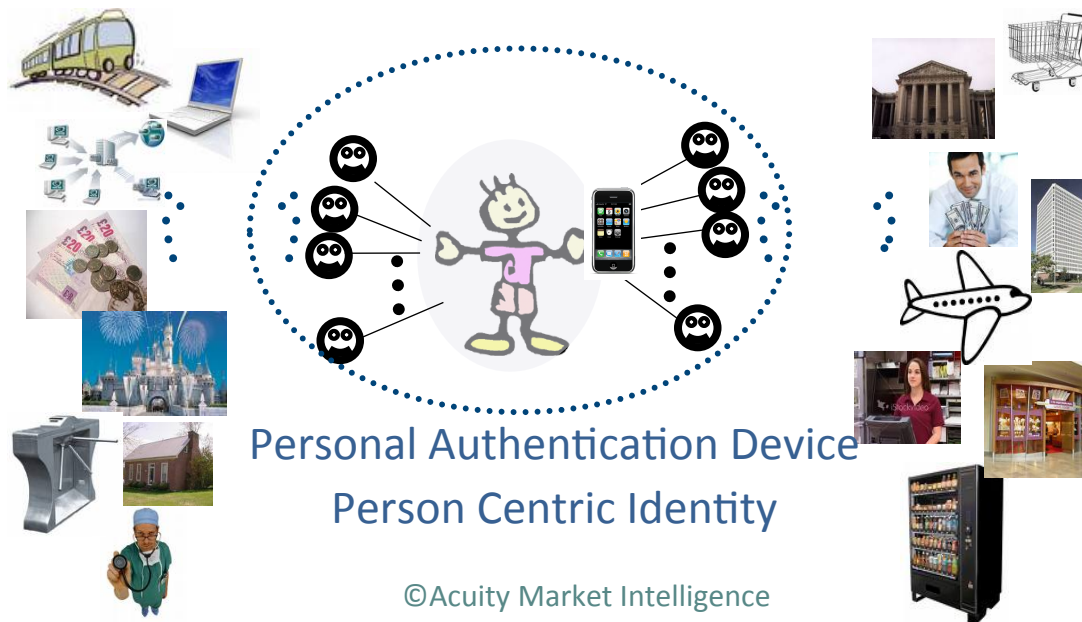
Why We Are Here?

- Defining, or “Re-Defining” Moment for the Biometrics Industry
- 2nd Time in a Little Over a Decade that Biometric Market Landscape Has Been “Fundamentally” Altered
 - In 2001, **Unpredictable** Impact of External Calamity - 9/11
 - In 2013, **Predictable** Impact of Disruptive Technology Innovation - Apple iPhone 5S



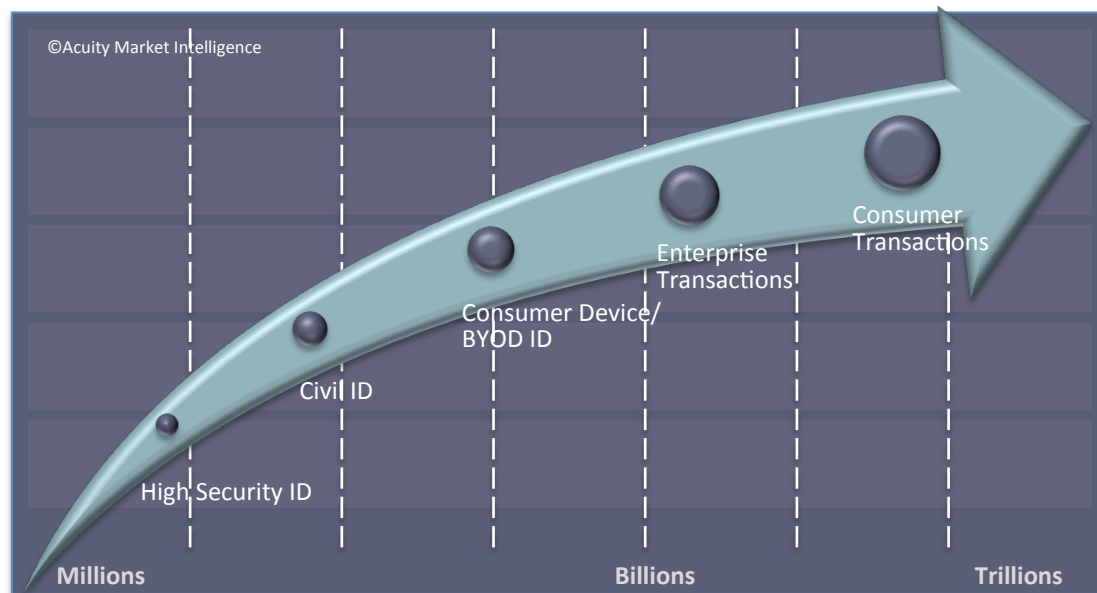
Acuity's Predictable Market Evolution

- Inevitability of Biometrics (2001) ✓
- *"Bridging the Human-Machine Identity Gap"* (2005) ✓
- Personal Authentication Device (2007) ✓
- Evolution Towards Person Centric Identity (2010) ✓
- Mobility Rules with findBIOMETRICS (2011) ✓
- Apple will solve the consumer biometric conundrum (2011) ✓



What's Driving the Mobile Biometrics Marketplace?

- Proliferation of Mobile Devices: Personal, BYOD, High Security
- Meta Forces > Mobility + Cloud + Identity Centric IT
- Requirement for Flexible and Responsive Critical Infrastructure
 - Consumer, Commercial, Government
- Apple's "Kiss"
- FIDO and the *Death of Passwords*
- Growing Mobile Authentication Volumes



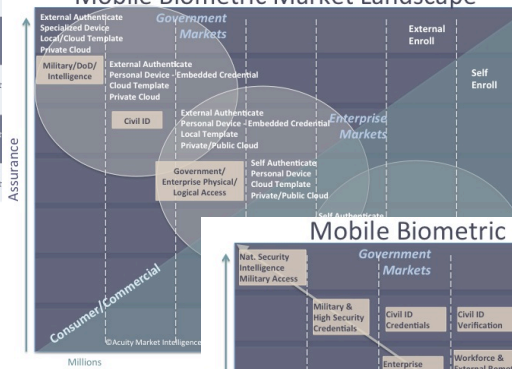
Modeling the Mobile Biometrics Market

- Mobile Biometric
 - Assurance Levels
 - Market Landscape
 - Market Sectors
 - Applications
 - Players

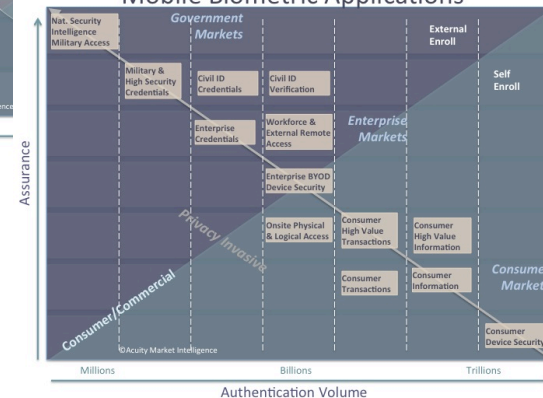
Mobile Biometric Assurance Levels

Level	Form Factor		Identity Proofing		Template	Access
	Sensor	Device	Enroll	Authenticate		
1	<ul style="list-style-type: none"> Commercial Grade 0% False Reject 1 in 50K False Accept 	Personal Device	Self	Self	Local	Local
2	<ul style="list-style-type: none"> Commercial Grade 0% False Reject 1 in 50K False Accept 	Personal Device	Self	Self	Local	Cloud
3	<ul style="list-style-type: none"> Higher Quality Commercial Grade or Multifactor - Contextual Limited False Reject 	Personal Device	Self	Self	Cloud	Cloud
4	<ul style="list-style-type: none"> Higher Quality Commercial Grade Multifactor - Contextual Risk Based False Reject 	Personal Device				
5	<ul style="list-style-type: none"> Extremely Low Probability False Accept Rate FBI Certified Multifactor - Token 	Personal Device	Embedded Credential			
6	<ul style="list-style-type: none"> 0% False Accept FBI Certified Multifactor - Token + Contextual, Biographic 	Personal Device	Embedded Credential			
7	<ul style="list-style-type: none"> 0% False Accept FBI Certified Multifactor Biometric 	Specialized Device	Embedded Credential			

Mobile Biometric Market Landscape



Mobile Biometric Applications

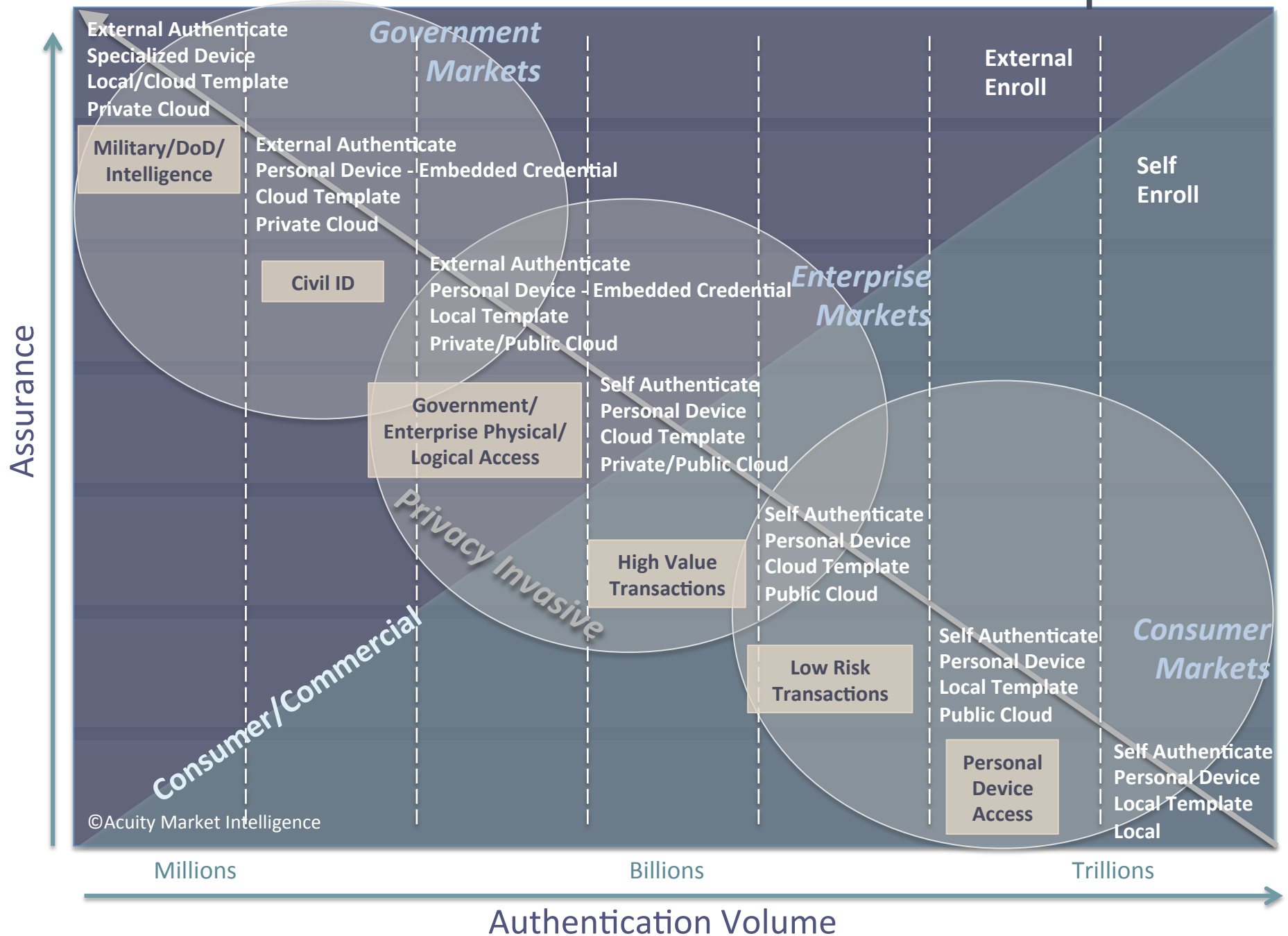


Mobile Biometric Assurance Levels

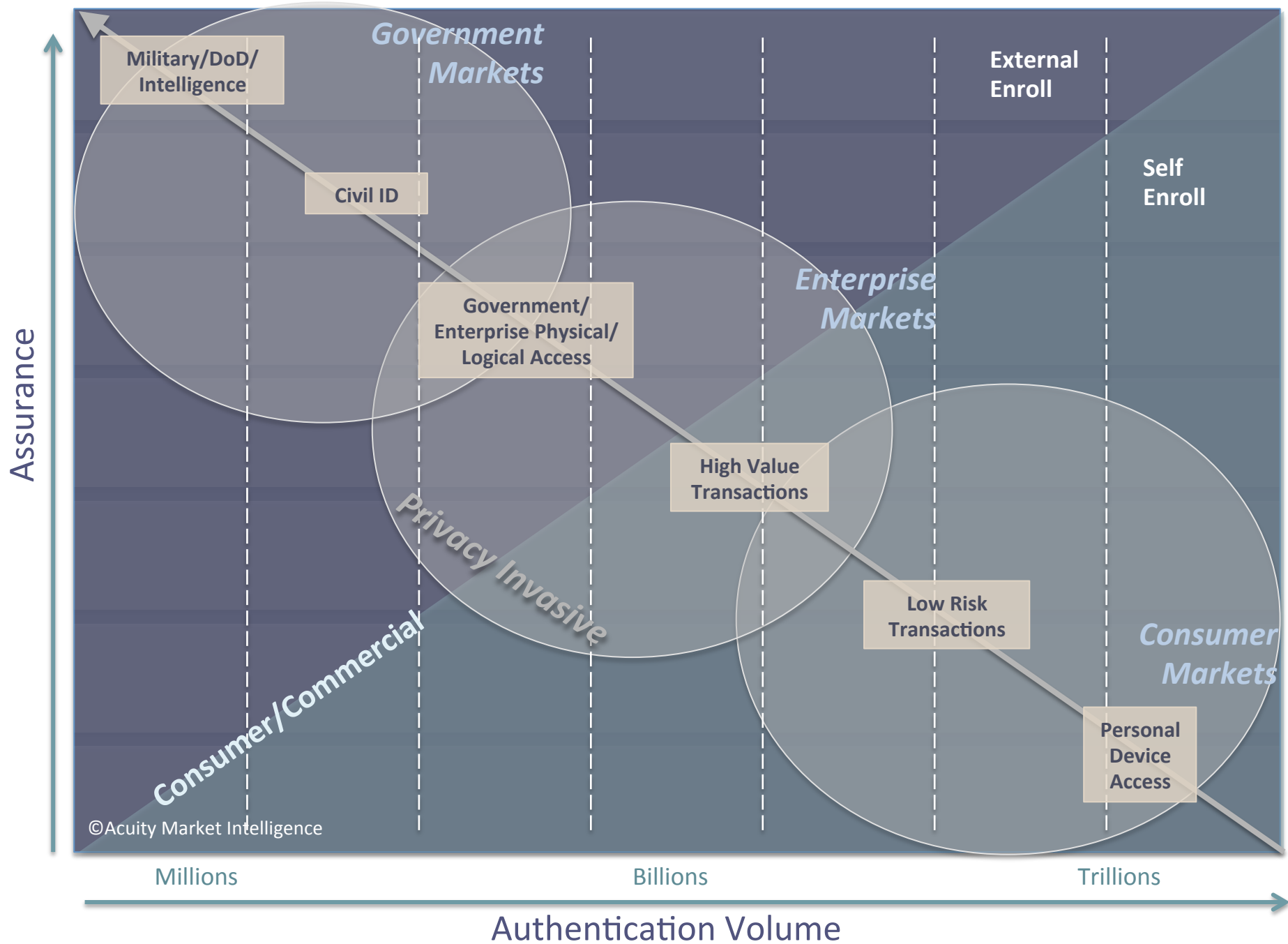
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4	<ul style="list-style-type: none"> Higher Quality Commercial Grade Multifactor - Contextual Risk-Based False Reject 	Personal Device	Self-External ID Vetting - Database Search	Self	Cloud	Private/ Public Cloud
5	<ul style="list-style-type: none"> FBI Certified Multifactor – Token Extremely Low Probability False Accept Rate 	Personal Device Embedded Credential	External ID- Vetting - Database Search	External	Local	Private / Public Cloud
6	<ul style="list-style-type: none"> FBI Certified Multifactor – Token + Contextual, Biographic 0% False Accept 	Personal Device Embedded Credential	External ID Vetting - Background Check	External	Cloud	Private Cloud
7	<ul style="list-style-type: none"> FBI Certified Multifactor Biometric 0% False Accept 	Specialized Device Embedded Credential	External ID- Vetting - Background Check	External	Local & Cloud	Private Cloud

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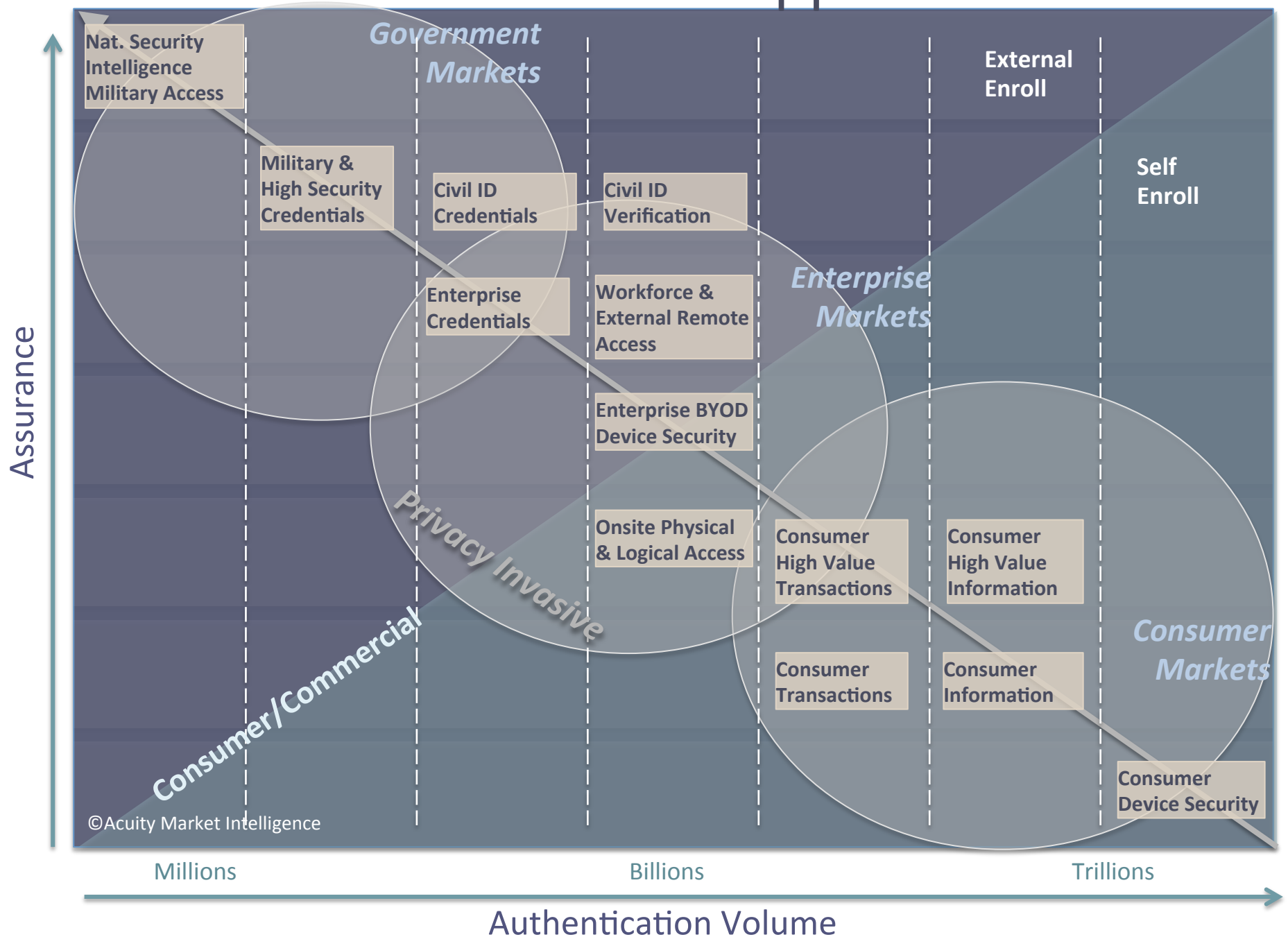
Mobile Biometric Market Landscape



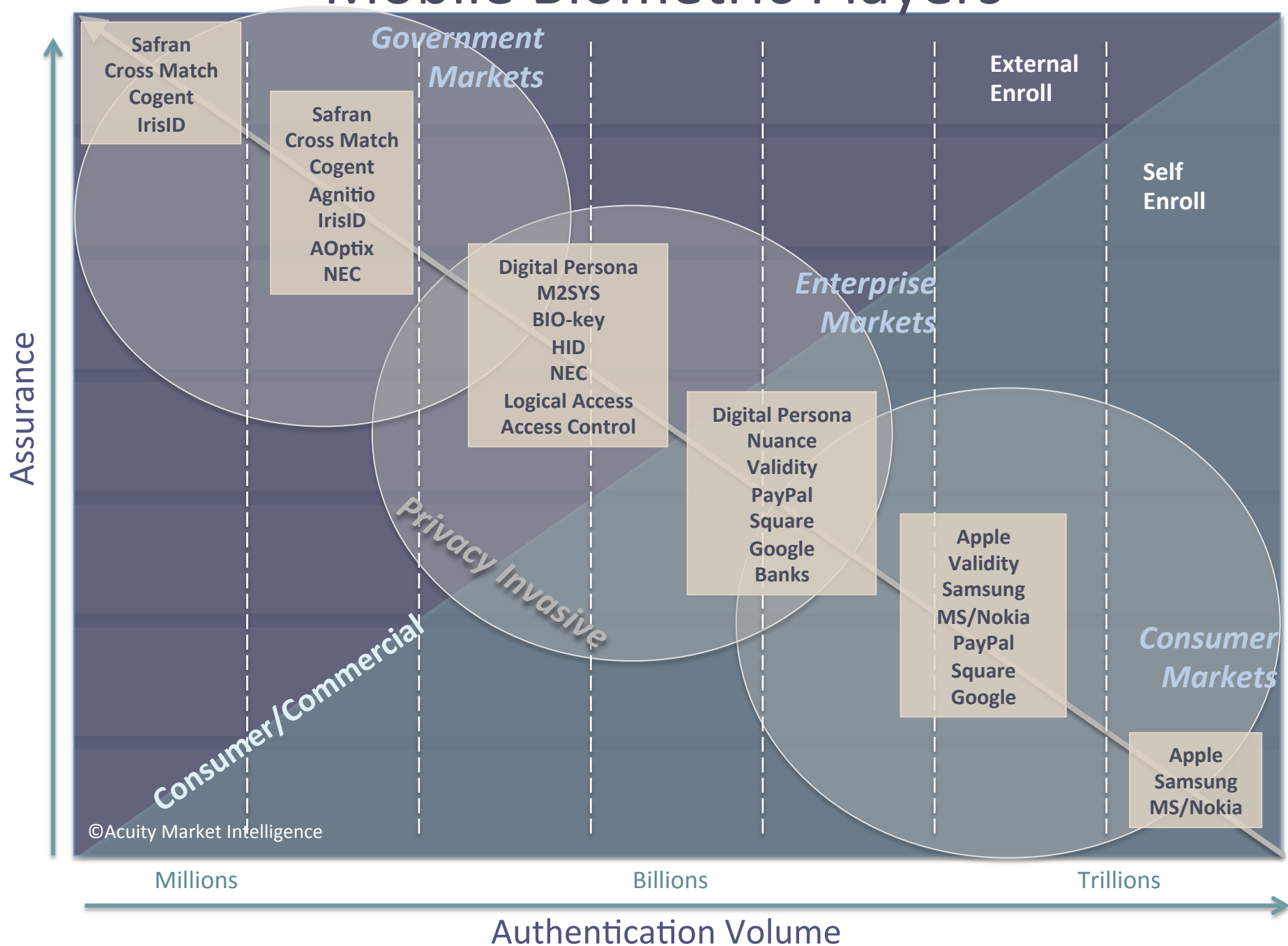
Mobile Biometric Market Sectors



Mobile Biometric Applications



Mobile Biometric Players



Today's Take Aways

- Mobility Truly Rules and is *Reshaping* the Biometrics Market Landscape
 - Fierce Competition has Arrived from Silicon Valley
 - Established Market Footholds are NOT Sustainable
 - Adoption of Silicon Valley Style *Innovation* and *Market Making* are REQUIRED
 - New Opportunities Based on Global Consumer/Enterprise Platform
- Now, MORE THAN EVER, Industry Cooperation is Critical
 - Unified Front > industry Voice That REDEFINES CONVERSATION
 - Honest Clear Communication about Capabilities and Limitations
 - Leverage Reality Based Expertise > Successes and Failures
 - STOP DEFINING PERFORMANCE BY FAILURE RATE!!!!

Simple Actions to Stay Engaged

- Join the  Group on LinkedIn
- Download Acuity's Mobile Biometric Market Brief

The Center of Gravity Has Shifted

