



Biometrics and Mobility

Déjà Vu All Over Again

C. Maxine Most
Principal
Acuity Market Intelligence

findBiometrics Webinar
May 9, 2013

- Strategic Research Consultancy Founded in 2001
- Focus on Electronic Identity including biometrics, 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 Summer 2013**



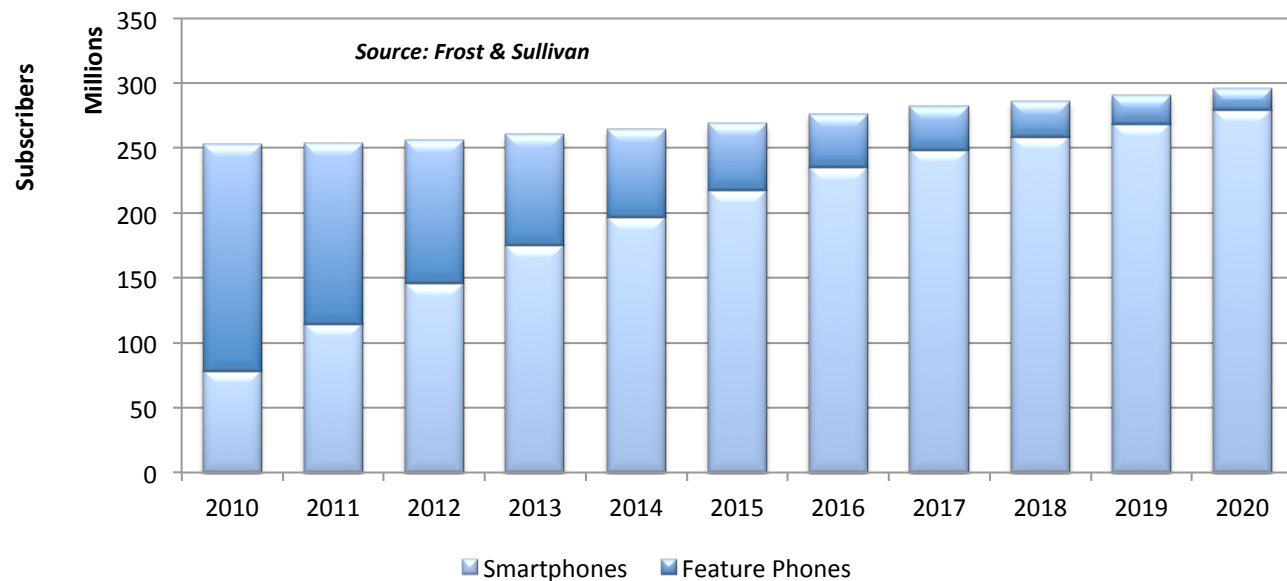
Déjà Vu All Over Again

Hype surrounding *biometrics enabling mobility on a global* scale reminiscent of past Biometrics frenzies

- The State of Play: Mobility
- Biometric Déjà Vu
- Historical Interlude: Predictions
- The Future is Now
 - Where Are We Going?
 - How Do We Get There?
 - Who Wins?
- Critical Factors

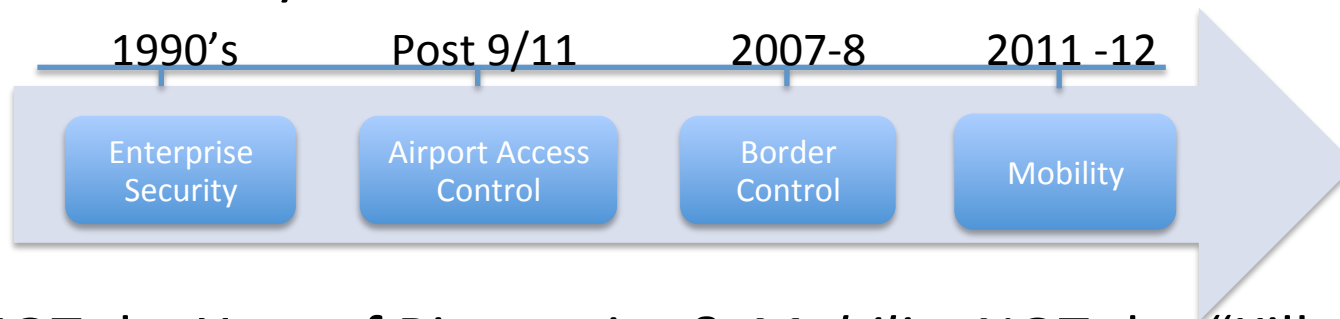
The State of Play: Mobility

- Billions of Mobile Devices
- Smart Phones Dominate
- Internet Everywhere (*almost*)
- Moving Towards an *Untethered Future*



Biometric Déjà Vu

- Biometric Hysteria Timeline



- NOT the Year of Biometrics & *Mobility* NOT the “Killer App”
- People care about Solutions NOT Technology
 - Biometrics an *indispensable* enabling technology that “no one cares about”
 - Along with hard drives, cloud computing, NFC, multi function smart cards, etc.
 - ... And they care about Biometrics even less - the flea on the tail of the dog (OK, maybe scientists, geeks, and teenage boys care about enabling technology)
- SO What does this mean for Mobility and Biometrics????

Historical Interlude: Predictions

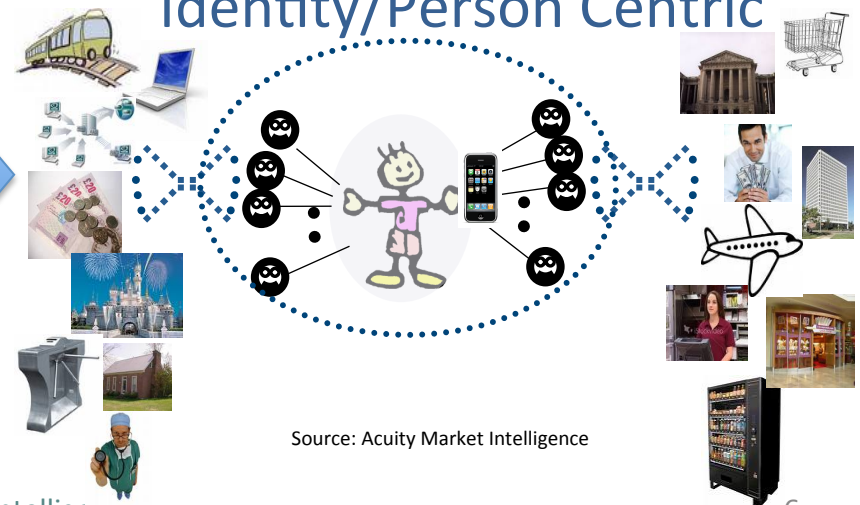
- Inevitability of Biometrics (Acuity, 2001) ✓
- *Bridging the Human-Machine Identity Gap* (Acuity, 2005) ✓
- *Personal Authentication Device* (Acuity, 2007) ✓
- Evolution Towards Person Centric Identity (Acuity, 2010) ✓
- Apple will solve the consumer biometric conundrum (Acuity, 2011) ?

Network/Machine Centric



Source: Frost & Sullivan

Identity/Person Centric



Source: Acuity Market Intelligence

The Future is Now

- Where Are We Going? **Biometrics *Indispensable* to Mobile**
 - Consistent expectation about the primacy of Mobile Authentication
 - “Untethered World” requires “Mobile Identity”
 - “Phone” as a concept is transformed
 - Information and Transaction Device
 - Personal Authentication Device
- How Do We Get There? **Multiple Dueling Visions**
 - Many Unknowns: technologies, platform, standards,
 - BUT What we do know:
 - Local control of personal data CRITICAL for most transactions
 - Multiple Levels of Authentication: Device Access, Local App, Cloud-based
 - Movement towards Independent Identity-Based Transaction Platform(s)
 - With all this uncertainty, how to proceed?
- Who Wins? **A Tale of Success**

Critical Factors

- Don't be fooled again ... by the latest bout of *Biometric Hysteria*
- Biometrics are indispensable to the Future of Mobility...
- BUT No One Care about Biometrics
- Technology always on a path to Commodification
 - Means to an end, not the end itself
- Focus on solving Customer and End User problems
 - As they perceive it
- Secure the Identity NOT the Network
- Champion a Vision to Build a Market
- See (vision) and build the Whole Solution



Thank you !

For more information on and to preview Acuity's research, please visit

www.acuity-mi.com

C. Maxine Most
Principal, Acuity Market Intelligence
+1 303 449 1897
cmaxmost@acuity-mi.com