



The Future of Biometrics

Mobility Rules

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Acuity Market Intelligence

Biometric Challenge Workshop
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McLean, VA

Today's Discussion

- Premise: Mobility Drives Biometrics
 - Mobility of Devices
 - Mobility of Individuals
- Critical Market Developments
 - Global Travel Identity Infrastructure
 - eCommerce and eGovernment
 - Convergence of Government and Commercial Platform
 - Mobility Drives the Enterprise
- Many Faces of ID Mobility
- Implications

About Acuity

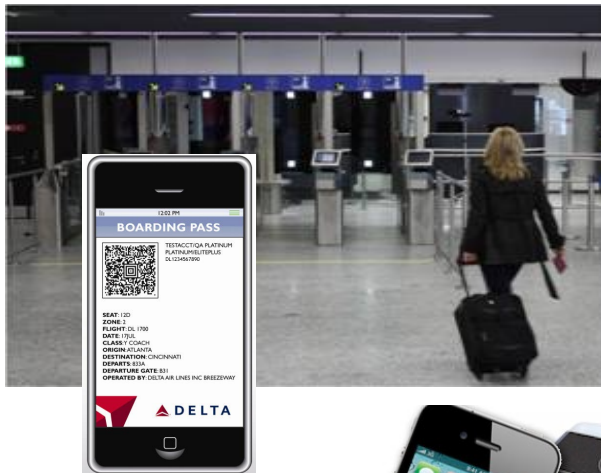
Acuity consistently delivers thought-provoking, hype-free, data-driven insight and analysis

- Founded in 2001
- Proven accurate market analysis
- Led by industry experts C Maxine Most & Rudie Lion
- Singular focus on electronic people identification
- Latest research: Global and Regional ePassport and eVisa and National ID Industry Reports



Premise: Mobility Drives Biometrics

Mobility and Associated Infrastructures, Platforms, and Applications are the Key to Understanding Biometric Market Evolution for the Foreseeable Future



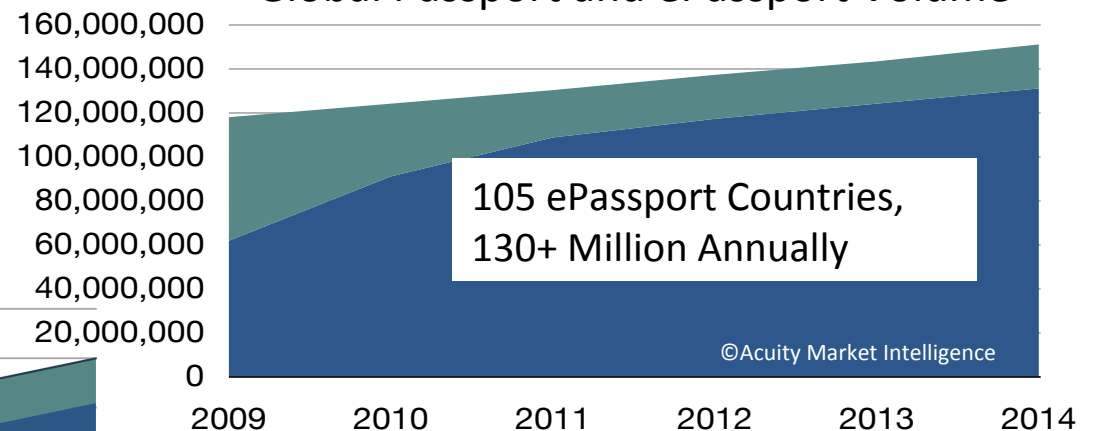
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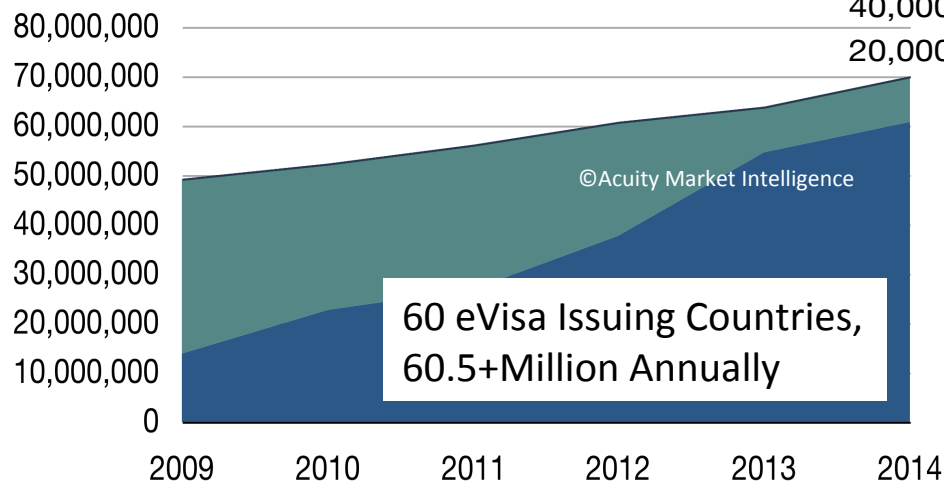
Global Travel Identity Infrastructure

By 2014, 87% of all Passports issued will be ePassports
and 87% of all Visas issued will be eVisas

Global Passport and ePassport Volume



Global Visa and eVisa Volume

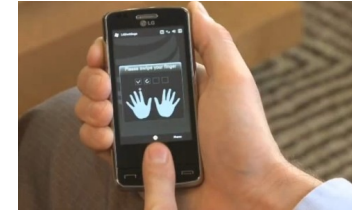


eCommerce & eGovernment

- By 2015, 60 Countries with National eID Platforms, ~800M Worldwide
 - Many “Multi-Application” and Biometric
 - Government Services: Healthcare, Welfare, Travel Cards
 - Commercial Services: Banking, Transportation, Micro Payments
 - India’s UID conceived as Domestic Platform for host of Commerce and eGovernment Services
 - Germany’s NEW National ID re-visioned as a multi service card - meets both ICAO and EC travel card standards
- Very Successful NFC-enabled Mobile Payment Trials on EVERY Continent
 - Handset Manufacturers, Mobile Operators, and Financial Institutions are collaborating on NFC-enabled Transaction Infrastructure

Commercial Market

- The iPhone Changes EVERYTHING
 - Your Phone is your Life
 - "there's an app for that!"
- Devices are getting smarter, faster, more accessible AND cheaper
 - Sensors embedded in Device: pointer, on/off switch
 - NFC is coming full-throttle
 - Dual Facing Cameras
 - Payment Processing
- And there are MORE OF THEM
 - 5B phones for 6.9B people = 72.6 %
 - Russia 147%, Italy 125%, Hong Kong 187%, Montenegro 192%
- Mobility in the field expands “Biometric” footprint
- RESULT: Mobility will Drive Enterprise Adoption



Government Market

- iPhone's for All – “is there an app for that too?”
- Multi-modal (e.g. multiple sensors/readers) Integrated Devices
- Very Successful for multiple scenarios
In the Field, In Theatre, At the Border
- Devices are getting smarter, faster, more versatile AND cheaper
- Field Based Government Services expand footprint
- Mobile Devices Drive Enterprise Level Adoption



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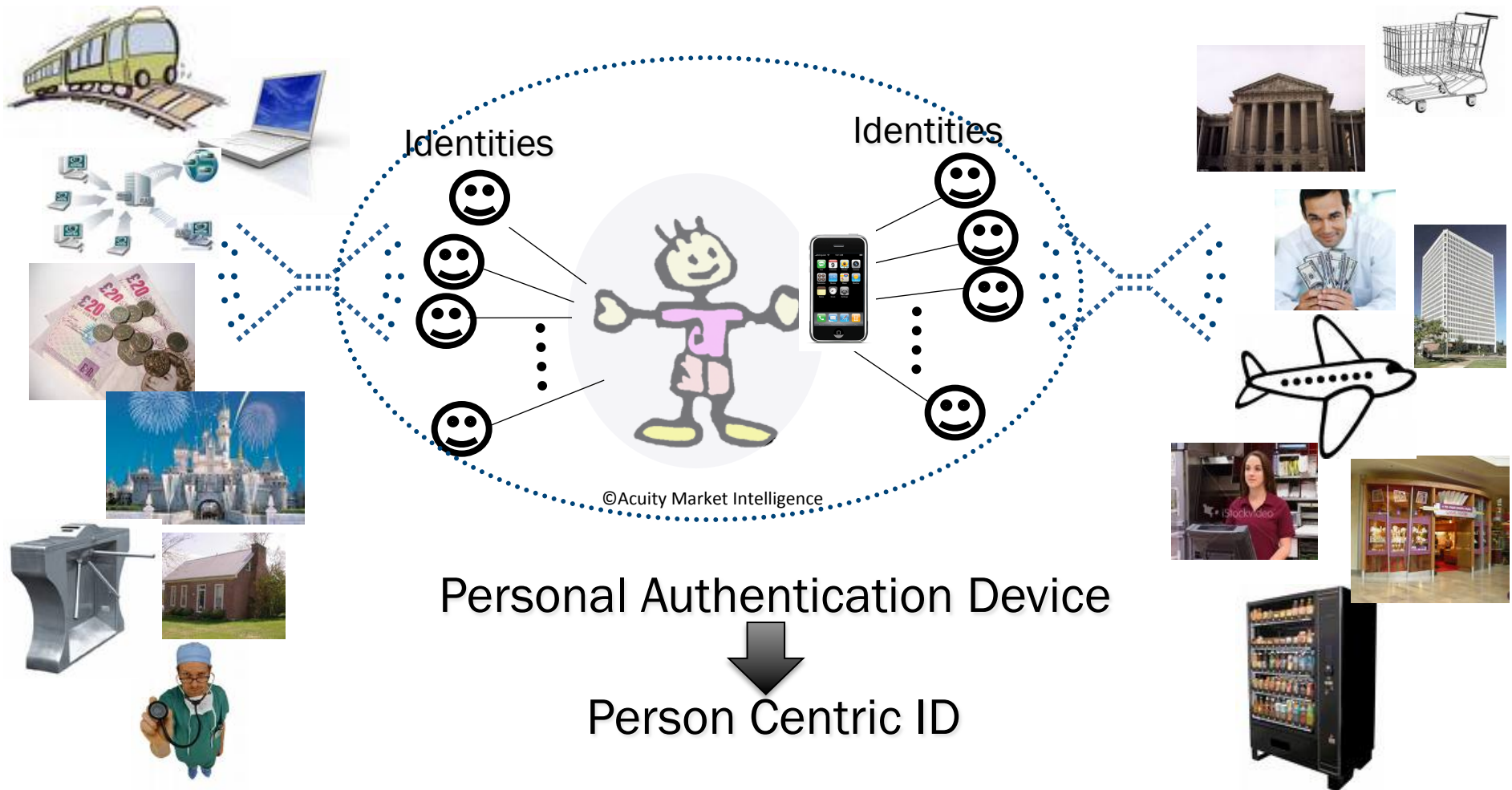


Mobility Drives the Enterprise

- Once again, the iPhone Changes EVERYTHING
 - Proliferation of Mobile Devices an IT NIGHTMARE
 - "Is there an app for that?"
- Devices are getting smarter, faster, more accessible AND cheaper
 - Everybody is using them all the time for CRITICAL proprietary, high-security Data and File Access and Communications
- Biometrics secure Mobility in the field; Better secure the Home Base as well



Many Faces of ID Mobility



Market Implications

- Usability IS Defining Principal – e.g. Apple
- Mobility Creates a Bottom-Up Evolution
- Biometrics is Enabling Technology, SO Enable Something
 - Secure Platforms and Transactions
- Innovate and Standardize
 - Watch Handset Manufacturers and Carriers
- Build Commercial Solutions
 - Leverage Government Infrastructure then Customize for Government



Thank you !

For more information on or to preview Acuity's
research and analysis

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