



VoiceBiometricsConference

London | NOVEMBER 6-7 2013



Welcome to VBC-London

Dan Miller

Sr. Analyst & Founder

Opus Research

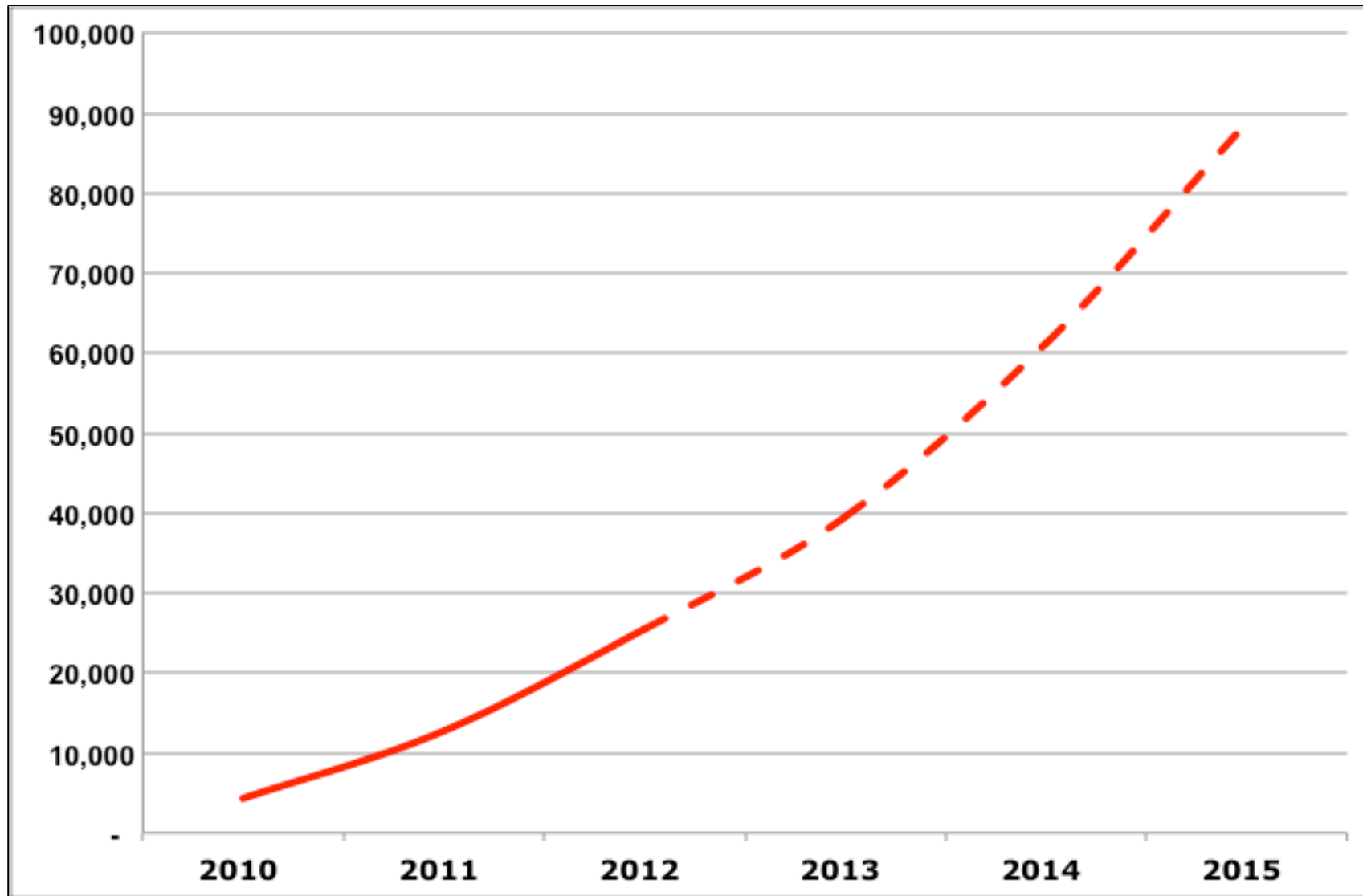
Voice Biometrics Conference: Then & Now

- Washington (2007)
 - Government agencies would be biggest customers
 - Compliance to regulations key to adoption
 - Voice is the most attractive single factor
- London (2013)
 - Telecoms, financials, healthcare lead in scale
 - Mobility/ubiquity shaping future
 - Voice is part of multi-factor, layered, risk-aware solutions

Lessons learned in the interim

- Voice biometrics = solutions, not just a technology
 - Lessons learned in Australia
 - Taking off among telecoms in Turkey
 - Law enforcement apps around the world
- Ready to emerge from background
 - Financial services in North America
 - Proof of life in Latin America, Asia and elsewhere
 - Mobile brings new app opps around the world

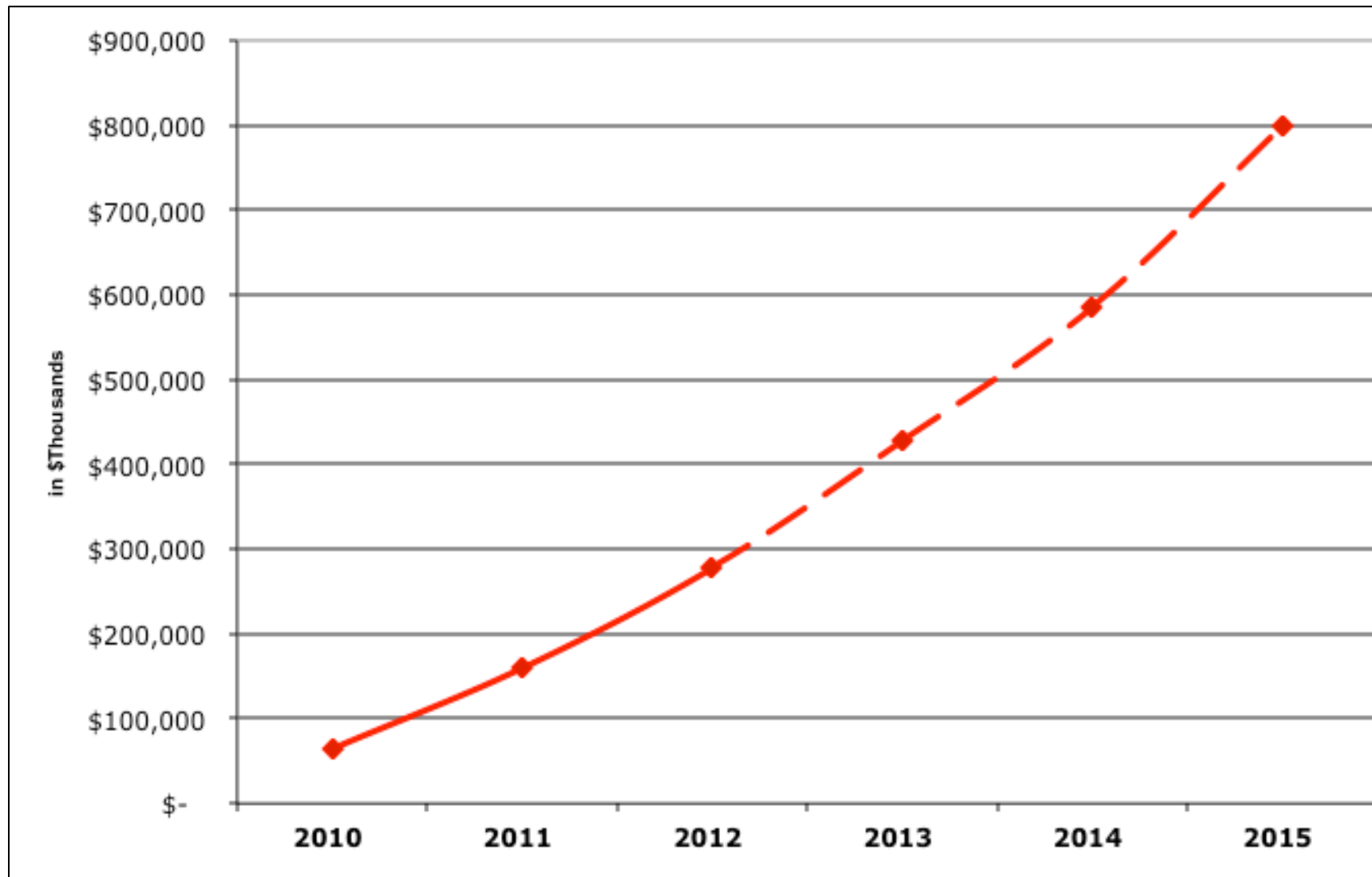
Over 35 million enrollees



Source: Opus Research 2013

- Proven to scale
- Simplifies authentication
- Some countries more receptive than others
- New metric may be needed

Revenue potential



Source: Opus Research 2013

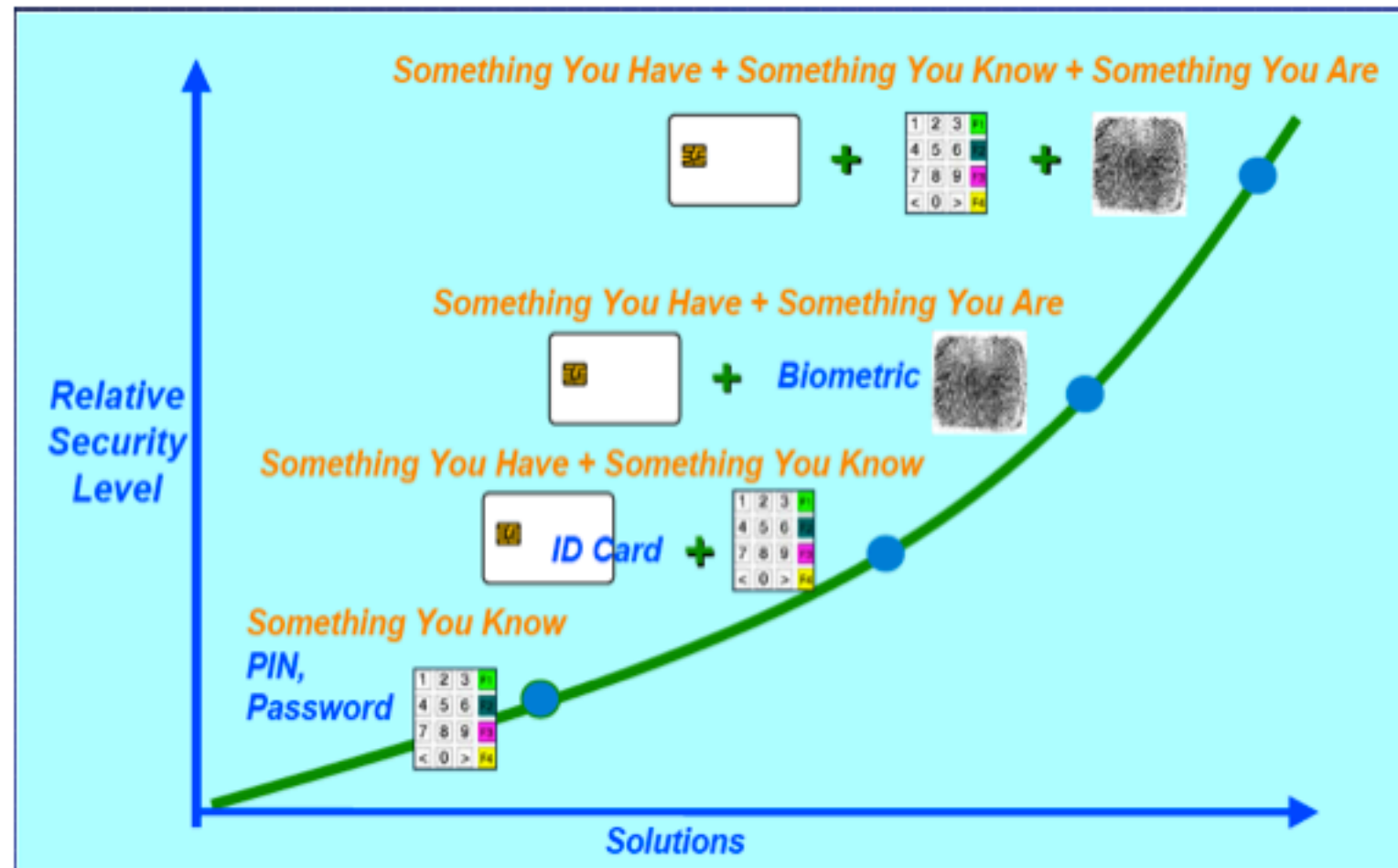
- Licensing/pricing evolving
- By server, enrollee, device, transaction
- Could be a vast underestimate

Pre-requisites for growth

- Replace or augment existing infrastructures
 - Password replacement (E.g. FIDO Alliance)
 - Device activation/personalization
 - Authorization of purchases
- Fostering trusted communications
 - Fast access to financial services, health records, etc.
 - Support of mobile banking, purchases funds transfer
 - Integrated with encryption, identity and access control

The beginning of broader recognition

Security Levels vs. Identity Assurance



Courtesy: Randy Vanderhoof, Smartcard Alliance

- EZ to draw, challenge to implement
- Uses current technologies
- Will require more cooperation/federation

What to listen for at VBC-London

- From the podium
 - Real world use cases and case studies
 - Vendor perspectives on challenges and solutions
 - Expert opinion from customers and practitioners
- At receptions and breaks
 - Demos from sponsors
 - Conversations with your peers
 - Your questions answered