Market Landscape

May 28, 2008
Don Rhodes, ABA
World of identity is too complex for its own good…..

- Individuals and commercial entities need simplicity in achieving what they want to do securely, privately, and confidently
- In order to grow outside the enterprise—federate the federations—identity marketplace needs an open, scalable, trustworthy commercially viable solution
The General Ecology

Identity Reliance

- Commercial
- Comm. Networks

Identity Assertion

- Family/Friends
- Employers
- Industry
- Institutions
- Financial
- Government

People, Entities, Machines, More?
The General Ecology:
Getting More Complex All the Time

Commercial

Comm. Networks

Financial

Family/Friends

Employers

Industry

Institutions

Government

People, Entities, Machines, More?
Need Consistent & Clear Customer Experience

- Minimize/Eliminate “Token Necklace”
- Customer Convenience
- Progress Feedback
- Consistent U/I
- Plain Language
- Simplified On-boarding
- 24x7 Service
- Low/No Costs
- Ease of SP Selection
- On-going Education
Worldwide Demand for Identity Management: Scenario Analysis

End User              Activity
Institutional           Structure
Rigid
Fluid

Business
Social

Day in the Park
Safety at a Price

End User
Activity

Vibrant Diversity
Anything Goes

I
II
III
IV
Drivers of Worldwide Demand: Spectrum of Trust Needs Based on Transaction Value

- Fraud prone, insecure communications
- Diverse user identity behaviors
  - Social networking anonymity
  - Ignorance of identity value
  - Identity theft a major concern
- Only "brand names" merit purchase trust
- Unreliable networks and services
- Competition through market forces
- Government use of criminal & civil law

- Secure trusted communications
- Effective consumer protection
- Harmonized identity standards
- Government certified identity providers
- Regional cooperation
- E-government ubiquitous
- Small number of large players
- E-commerce thrives
- Highly regulated environment

**Day in the Park**
- Internet relatively safe, spam & virus free
- Strong social networking communities
- Advertising supported e-commerce
- Primarily user-generated content
- Instant messaging popular
- Interoperability expected & widespread
- Most services free or low cost
- Light regulatory regimes

**Safety at a Price**
- User trusted identity protection
  - Identity providers are really protectors
  - Neutral 3rd parties provide trust
  - Effective user control of identity
- Specialized and localized service provision
- Fragmented, hybrid ecosystem
- Regional solutions thrive
- Services separated from access
- Lightly regulated environment, free market pricing

**End User**

**Activity**

**Social**

**Institutional**

**Business**

**Fluid**

**Rigid**

**Vibrant Diversity**

**Anything Goes**

**Anything Goes**

**Day in the Park**

**Safety at a Price**