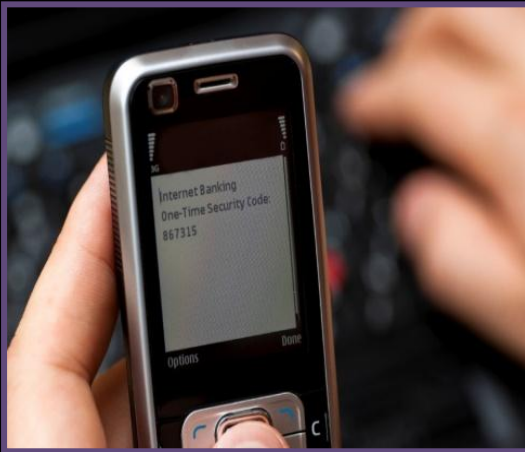


mSecurity Series 2010

The Mobile Phone As An Authentication Device Analysis and Forecasts 2010-2014

The Next Generation for Authentication and Authorisation



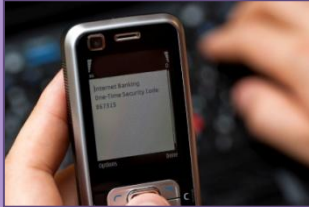
Report Summary: The first report in the Goode Intelligence (GI) mSecurity Series, *The Mobile Phone As An Authentication Device*, is a strategic analysis of the market for mobile authentication products and services. This 150+ page report includes an investigation on current mobile phone-based authentication technologies. A detailed analysis of the current market is supported with interviews with key stakeholders, from vendors to end-users. Forecasts for growth opportunities, global and regional, are also included, for the five years from 2010 until 2014.

Report Benefits:

- A unique guide to the mobile phone authentication market, including current status, market analysis and five-year forecasts
- Authored by a leading industry expert with over 20 years worth of experience in this sector
- Intelligent insight with industry interviews, case studies, vendor profiles and market driven analysis
- Regional guide on activity that includes case studies on key deployments along with details on pricing and revenue opportunities

"The mobile phone is the perfect user-centric device for authenticating employees, internet banking customers and citizens into your network and will replace the hardware token as the de-facto 2FA device." Alan Goode:
Author and Managing Director, GI.

Opportunities



*"New mobile-only 2FA vendors are taking market share away from the two dominant 2FA hardware token vendors who are having to adapt to this challenge. The introduction of mobile 2FA is leading to new markets for authentication vendors hence the loss of market share should be offset by a bigger market for all. It is an exciting time to be selling mobile 2FA products and services." **Alan Goode, Author and Managing Director, Goode Intelligence***

WHO SHOULD READ THIS REPORT?

Technology Vendors

Gain an insight into an emerging, high-growth market and arm yourself with independent analysis. A valuable reference point.

Managed Services

Assess the market opportunities for running this as a profitable SaaS.

Security Professionals

Discover how the mobile phone as an authenticator can reduce costs and increase security for employees and customers alike.

Mobile Operators

There is a need for a high-availability, secure, SMS infrastructure to support this growing market.

Financial Institutions

Evaluate this growing market and learn why it is an important area for potential investment.

INSIGHTFUL ANALYSIS IN THIS REPORT

The main technologies enabling the mobile phone to be used as an authentication device:

- **One Time Password (OTP) sent via SMS:** SMS delivery of an OTP to a mobile phone
- **Soft Token:** Software, usually a Java application, is downloaded and installed on a mobile phone to generate an OTP
- **Mobile PKI:** The mobile version of the certificate-based authentication system using PKI
- **Voice:** The mobile phone user responds to a voice call to authenticate themselves

Interviews with Leading Stakeholders

Including:

Anakam, Clickatell, CRYPTOCard, CRYPTOMATHic, Entrust, FireID, Fronde Anywhere, RSA, Logica, Monitise, PhoneFactor, Securenvoy, Signify, SMS Passcode, Sybase 365, Vasco.

FIVE-YEAR FORECASTS 2010-2014

Global and Regional Forecasts*:

Mobile Phone Subscribers:

- Total number of mobile subscribers (m)

Users:

- Total number of SMS OTP users (m)
- Total number of soft-token OTP users (m)
- Total number of mobile PKI users (m)
- Total number of 'other' authentication users (m)
- Total Financial Services mobile authentication users (m)
- Total Government Services mobile authentication users (m)
- Total Healthcare Services mobile authentication users (m)
- Total Enterprise Services mobile authentication users (m)
- Total eCommerce Services mobile authentication users (m)
- Combined total mobile authentication users (m)

Volume:

- SMS OTP total transactions per annum (m)
- Soft-token OTP total transactions per annum (m)
- Mobile PKI total transactions per annum (m)

Volume (Cont.):

- 'Other' authentication total transactions per annum (m)
- Financial Services total transactions per annum (m)
- Government Services total transactions per annum (m)
- Healthcare Services total transactions per annum (m)
- Enterprise Services total transactions per annum (m)
- eCommerce Services total transactions per annum (m)
- Combined total transactions per annum (m)

Revenue:

- SMS OTP total revenue per annum (\$)
- Soft-token OTP revenue per annum (\$)
- Mobile PKI revenue per annum (\$)
- 'Other' authentication revenue per annum (\$)
- Financial Services mobile authentication revenue per annum (\$)
- Healthcare Services mobile authentication revenue per annum (\$)
- Enterprise Services mobile authentication revenue per annum (\$)
- eCommerce Services mobile authentication revenue per annum (\$)
- Combined total revenue per annum (\$)

**Contents correct at time of print*

Key Questions/Table of Contents/Companies Included

KEY QUESTIONS THAT THIS REPORT ANSWERS:

- ✓ What technologies will dominate?
- ✓ Does the mobile phone as an authentication device provide adequate security?
- ✓ Which vendors will dominate the market?
- ✓ What sectors will see the biggest growth?
- ✓ Will the adoption of this technology lead to greater growth for the 2FA market?
- ✓ How does regulation affect the market?
- ✓ What is the current and future size of the market?
- ✓ What opportunities exist?
- ✓ Is this an area to invest in?
- ✓ Will the mobile phone as an authentication device change the landscape for what vendors dominate the authentication market?
- ✓ What are the benefits of using a mobile phone as an authentication device?
- ✓ Is there a compelling business case for using a mobile phone as an authentication device?

Companies Included: ActivIdentity, Anakam, Arcot, Celestix, Commerce Media, Cidway, Cisco, Citrix, Clickatell, CRYPTOCARD, Cryptomathic, Diversinet, Entrust, Encap, FireID, Fronde Anywhere, G&D, Juniper, M-Com, Monitise, PhoneFactor, PortWise, RSA, Salt Group, SecurEnvoy, Signify, SMS Passcode, Sybase 365, Swivel, Talariax, Vasco, Valimo, Verisign.

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About Goode Intelligence

Goode Intelligence (GI) is a specialist provider of Information Security and Mobile Commerce research and analysis. For more information about Goode Intelligence and its forthcoming Mobile Phone Security Report Series, *mSecurity Series 2010*, visit www.goodeintelligence.com.

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About the Author

Alan Goode is the Founder and Managing Director of Goode Intelligence. He is a respected expert in mobile commerce and information security and has written a number of reports on these subjects.

Prior to this, Alan spent over 20 years in the mobile commerce and information security industry where he held senior management positions for leading organisations including T-Mobile UK, De La Rue, Citibank and Atos Origin.

mSecurity Series 2010



Mobile Phone Anti-Virus Products and Services 2010-2014: The second in the mSecurity 2010 series and covering all you need to know about the mobile phone anti-virus market including detailed forecasts from 2010 until 2014.

mSecurity Series 2010



Mobile Phone Protection Products and Services 2010-2014: The third in the mSecurity 2010 series and covering all you need to know about the mobile phone protection market including detailed forecasts from 2010 until 2014.