



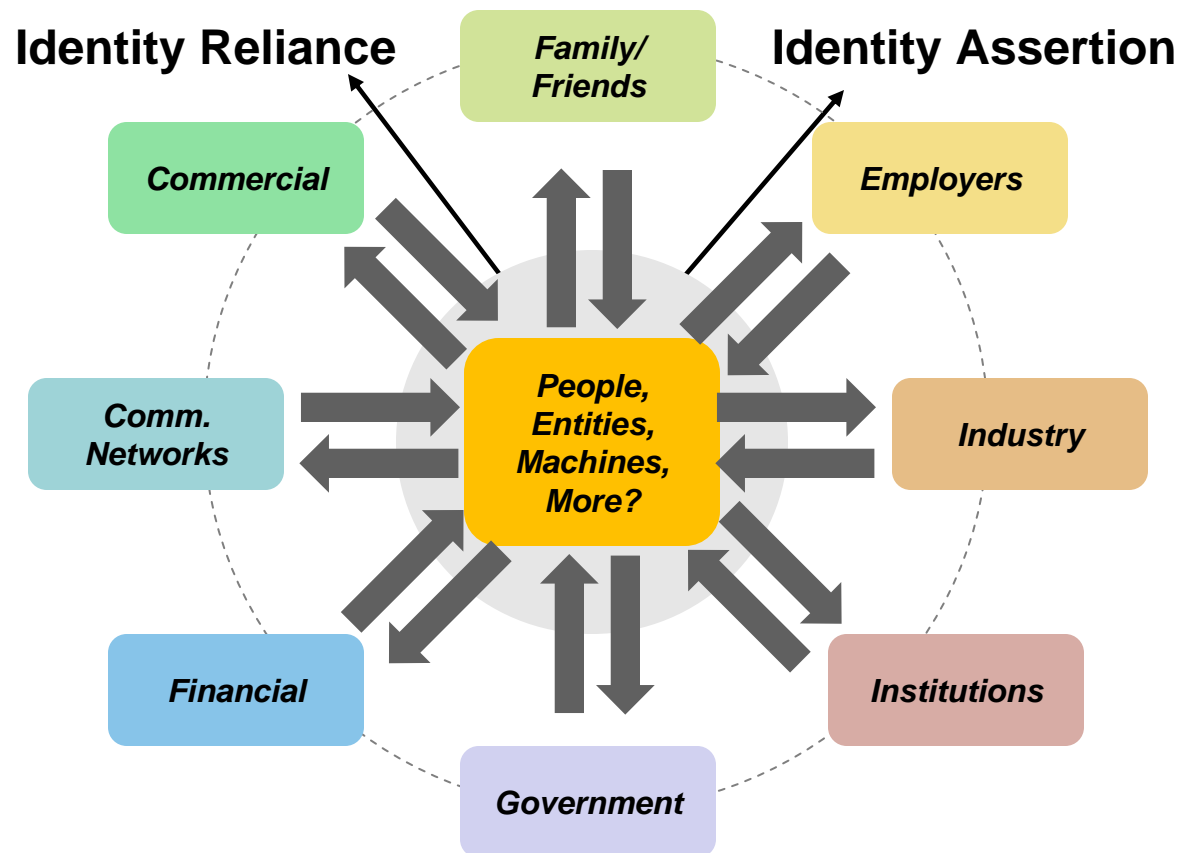
Market Landscape

May 28, 2008
Don Rhodes, ABA

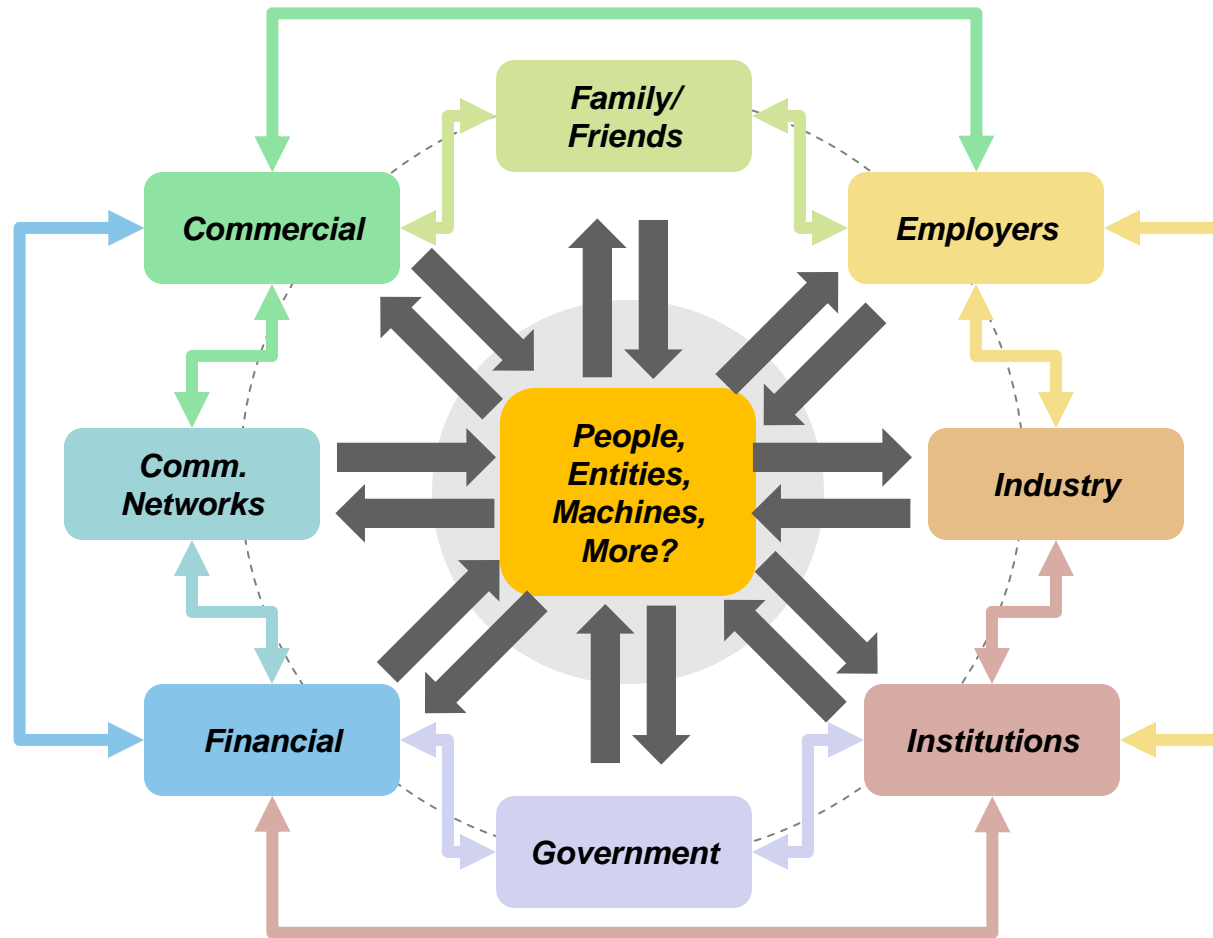
FS Identity Marketplace Issues

- **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

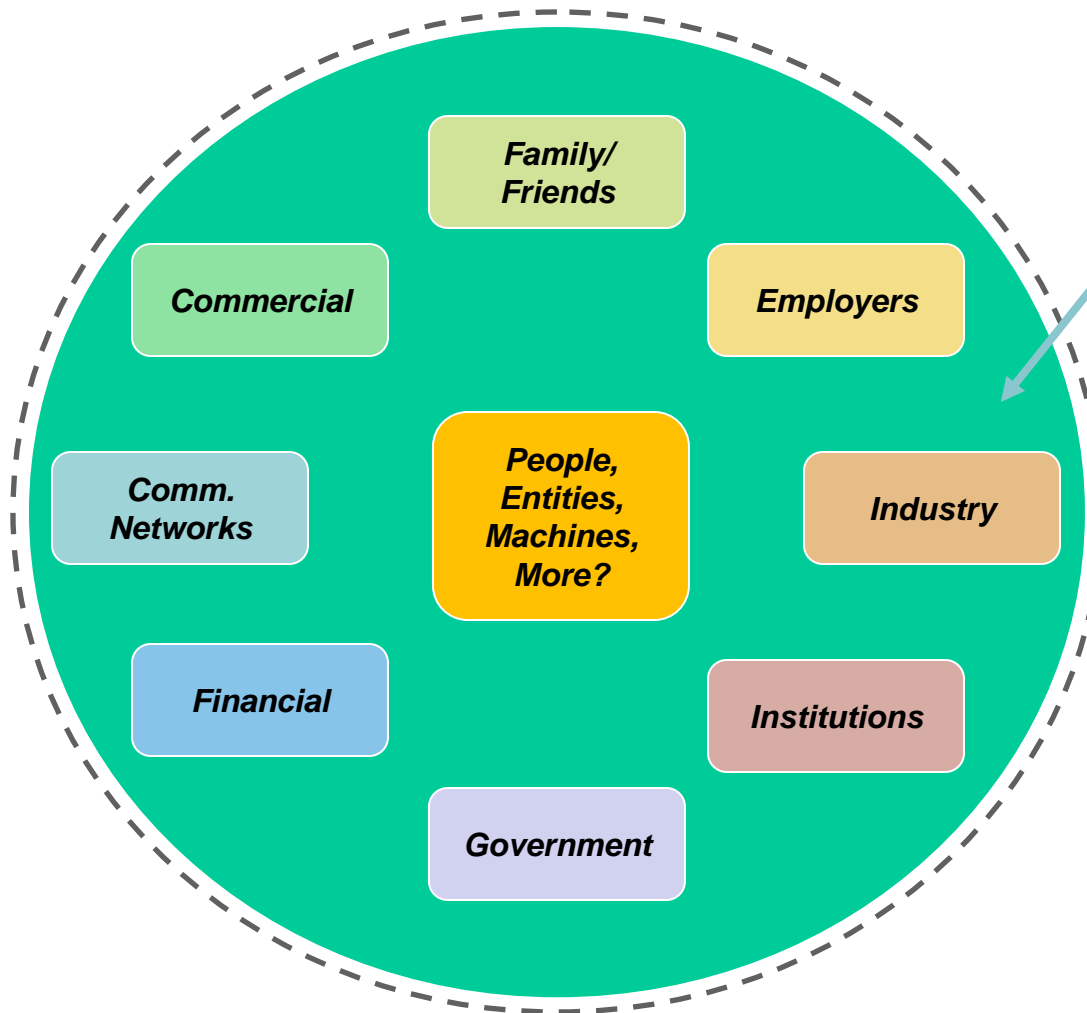
The General Ecology



The General Ecology: Getting More Complex All the Time

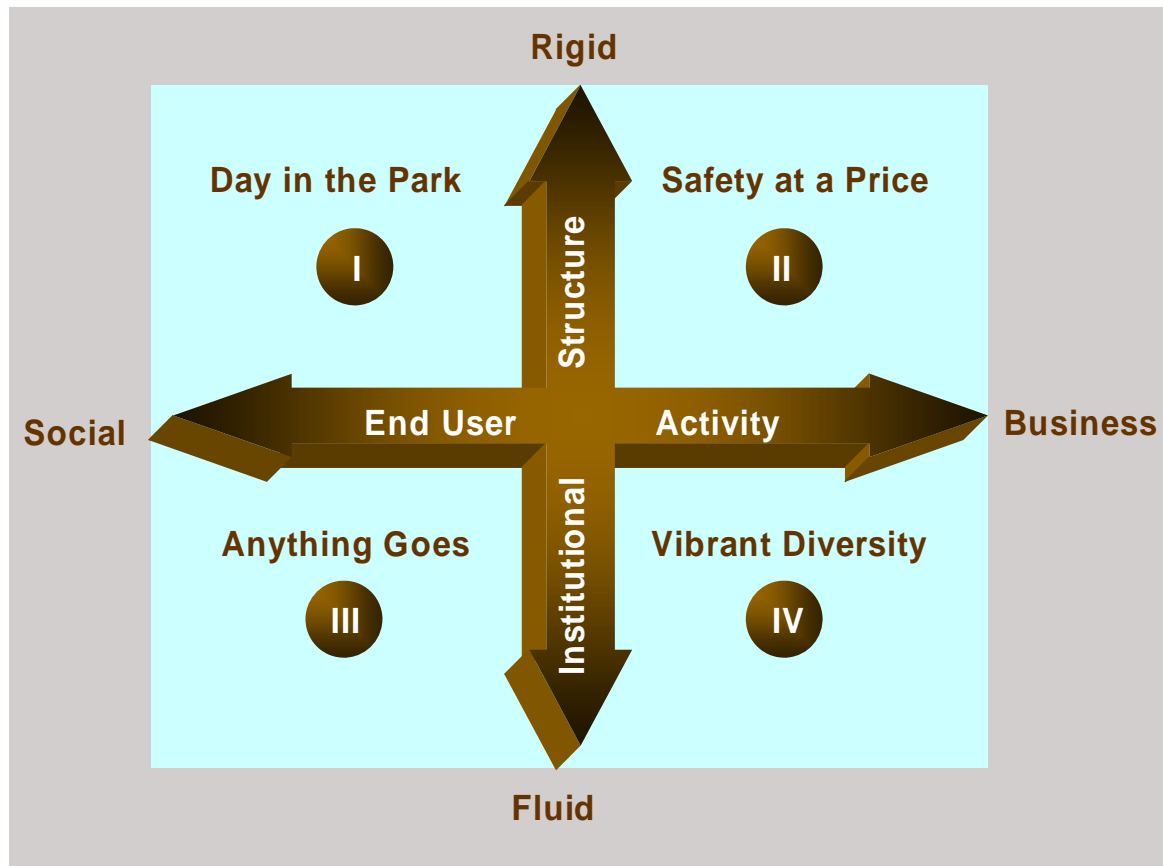


Need Consistent & Clear Customer Experience



- 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:



DRIVERS OF Worldwide Demand: Spectrum of Trust Needs Based on Transaction

