



DTCE annual meeting

Market perspectives for eID and eTrust services in Europe

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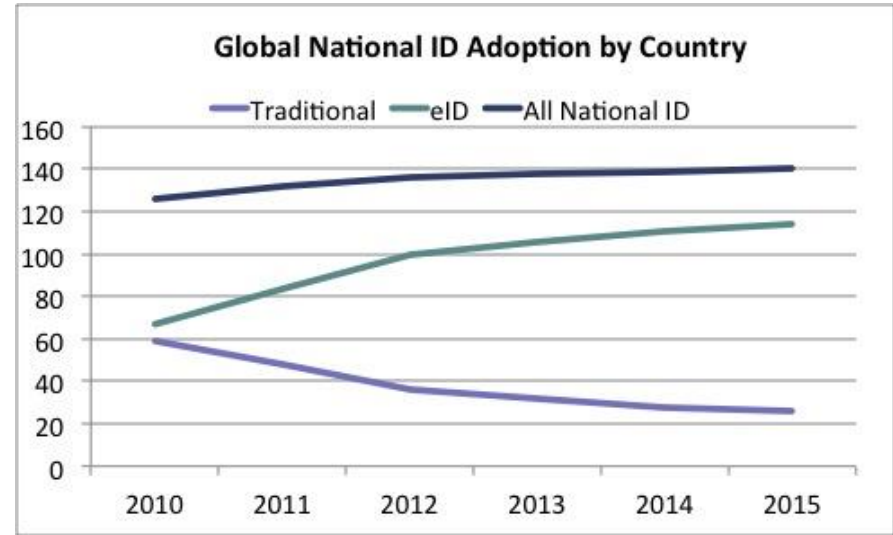
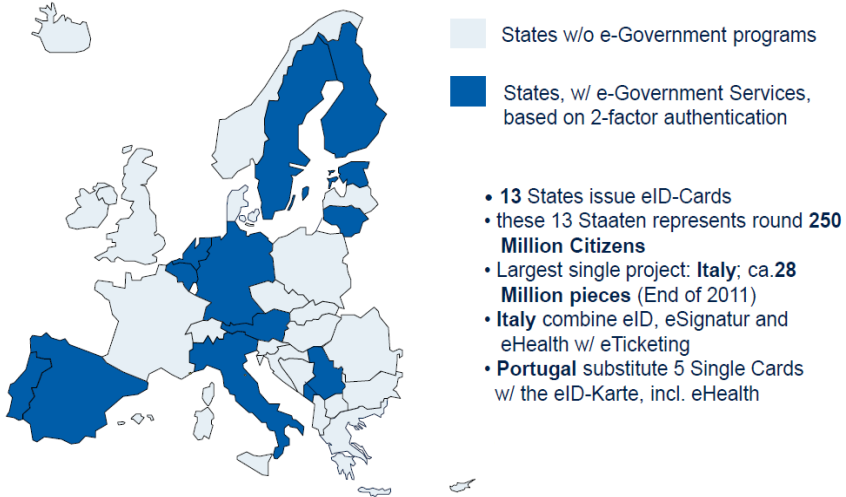
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eID market dynamics

National eID Programs in Europe,



Worldwide e-ID market ~6,5 MD€

- Equipment market for eID document
 - Saturation in 2015 for ePassport
 - No harmonized technology and governance on eID cards within Europe
- 3 competing approaches :
 - Government based (BE, DE, SP, IT (Regional), Estonia, Portugal)
 - Private sector based (FR (?), Nordics, CH)
 - Rely on GAFA (Facebook Connect, Google premium API)



eID technology dynamics

- Smart card industry
 - IAS & EAC V2 standards have been designed to fit the needs of smart card based citizen eID program
 - France did not start its citizen eID program
 - Difficulty for Germany to support industry investment with its sole domestic market
 - => Need effort to converge to something new agreed between industry leaders and governments
 - US is pushing CIV standard (more for BtoB) : UK could adopt it
- Alternatives
 - Proprietary with interoperability frameworks (SAML, OpenID, OpenIDConnect)
 - Supported by GAFA



eID regulatory dynamics

- European regulation project
 - eID should be under subsidiarity regime (but eServices should be really regulated)
 - Concerns of some EUMS on current version of draft about low aligned level of security)
 - DTCE issued a supportive position paper
 - Regulation can enforce better interoperability and facilitate emergence of industry standards
 - DTCE gathers field experience to share with EU decision makers



eID - Example of France

- No government based citizen eID program
- PKI based eID for BtoB
 - 2,5M certificates
 - Applications
 - Relations between enterprises and Government (Tax, ePurchasing)
 - Relation between enterprises and banks (Cash management)
 - Industry extranets
 - Professional e-Health cards
 - Civil agent eID card
 - Common regulatory framework (RGS) agreed between banks and Government (based on ETSI TS 102 042 and 101 456)



Digital Signature market dynamics

- Good growth trend at worldwide level
 - +48% annual growth estimated by Gartner in 2012
 - in the US : led by low-end solutions, positioned on low-risk documents (NDA)
- 3 competing approaches in Europe :
 - High-end smart card based solutions : depends on massive equipment initial investment
 - Intermediate server based + authentication solutions :
 - Easy to deploy for Service providers and operated by certified Trust Service Providers (ETSI TS 102 042)
 - Real success in BtoC (France, Nordics)
 - Compliant with EU advanced signature
 - Low-end solutions « US-like » : penetration in northern Europe, for low-risk BtoB documents ; no clear liability



Digital Signature regulatory dynamics

- E-Invoice EU directive came into force in January 2013
 - Digital signature is challenged by the third possibility (ad hoc traceability process)
- European regulation project
 - Regulation = good for interoperability, good for liability, good for industry sustainability and profitability
 - Success of the pragmatic intermediate approach (server based + authentication) is acknowledged by the commission but with concern of preserving good level of security
 - CEN initiative to define associated protection profile
 - New services will be (hopefully !) covered by the regulation
 - Electronic seals (e-invoice)
 - E-Delivery services (certified / registered e-mail)
 - Timestamping



Digital Signature - Example of France

- BtoB
 - PKI token based for eGovernment, eBanking and corporate security
 - Dynamics on Public purchasing and Cash management (EBICS-TS)
 - PKI server based is taking off : employment contracts, BtoB contracts, compliance / traceability documents

- BtoC
 - E-subscription online : +20% annual growth ; mainly in banks, insurance, e-commerce and distribution sectors
 - server based + online authentication
 - E-contracting in Point of Sale : taking off to massive deployment
 - Server based + F2F authentication
 - Rolling out of acquisition applications on tablets (iOS, Android)



Conclusion

- Need for regulation
 - Ensure global liability
 - Mutualize investment on all EUMS
- Digital Signature took off
- Need to adopt pragmatic approach on digital signature
 - Good approach : Server based + authentication with protection profiles to ensure good level of security
 - No need to rebuild everything in delegated acts : ETSI framework are efficient



Thank you for your attention.



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