

Trends in Physical Access Control

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THE INEVITABLES

by Lee Odess, CEO, Access Control Executive Brief

Let's Start with:

THE NEXT 30 YEARS OF OUR
INDUSTRY HAS NOTHING TO
DO WITH THE PAST 30 YEARS.

A GAME AND A STORY.

LETS PLAY

NAME
THAT
DEVICE

WHAT IF I TOLD YOU THERE WAS A DEVICE THAT HAD...

- **MFA**: keypad, card, and understood localization
- **Fintech device**: tightly tied to pay
- **Delivered value add beyond its value prop**: workflow & automation
- **Focused on PII**: central identity database used for verification
- **Can ALSO open a door**: access control

What would you call it?



THE FUTURE OF ACCESS CONTROL?



TRW

1970s technology.

Check authorization terminal had an option for “administration” use, that is, it had an option to open a door.

Kmart, Sears, JC Pennies, Montgomery Wards, Neiman Marcus, Bloomingdales, etc.

TRW Data had THE largest banking data in the world (guess what the name of the company is today?)

THE FUTURE OF ACCESS CONTROL?



Toye Corporation

Started in 1941 with government IDs

1960s time and attendance

1974 differentiated optics cards

"Site code exclusivity" applied and used by Cincinnati Parking



WELCOME BACK
TO THE 1970S!

WE HAVE ALWAYS BEEN TIED TO PAY.
WE JUST LOST IT IN THE 1980S AND
HAVE BEEN ITERATING FOR 30 YEARS.

JOURNEYING FROM THE PERSON TO THE DOOR
AND NOW BACK TO THE PERSON NECESSITATES
AN ALTOGETHER DIFFERENT WAY OF THINKING,
BUILDING AND COMMUNICATING.

FYI...Computer Vision is going to be even bigger.



I CHALLENGE OUR INDUSTRY TO GO
BEYOND "THE CARD IN PHONE."
TELL THE ENABLEMENT STORIES.

(and while you are at it, go beyond cloud and ai)



My Things That Matter

"THE INEVITABLE"

2023 THINGS THAT MATTER



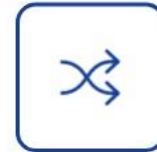
Emphasis on "Things"



Historical moats reduced



A fit for purpose



Impact of high interest, low office occupancy rates, rise of the neighborhood



Training and certification



A redefined channel



Consolidation



Managers out, leaders In

2023 THINGS THAT MATTER



Margin stacking
conundrum



Online + offline



Mobile + cloud
computing with AI



Shift from door to person
and UX



Single pane of glass



Importance of community



Video access control



More integrated, not open

MARKET ASSUMPTIONS



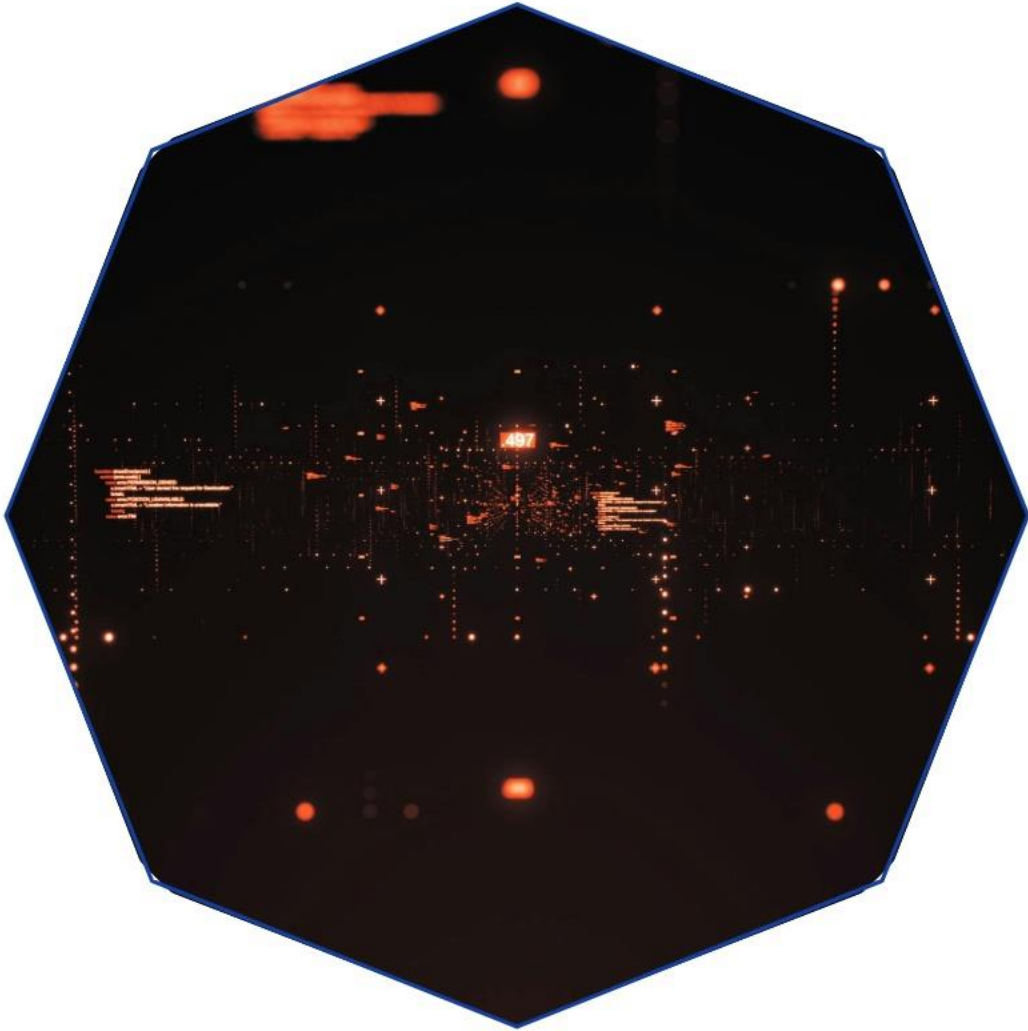
Digital transformation =
**Enterprise Software > IT
Convergence**

MARKET ASSUMPTIONS



Continued influx of new money: PE and strategic capital

MARKET ASSUMPTIONS



Data as **refined oil.**

MARKET ASSUMPTIONS



Cloud and mobile **first** +
adoption, and then comes AI

MARKET ASSUMPTIONS



Safety as a bedrock +
**operational efficiency and
revenue generation**

MARKET ASSUMPTIONS



\$70-100B opportunity

MARKET ASSUMPTIONS



Built environment turbulence
soft spot (legacy) **and**
opportunity (rethinking value)

MARKET ASSUMPTIONS



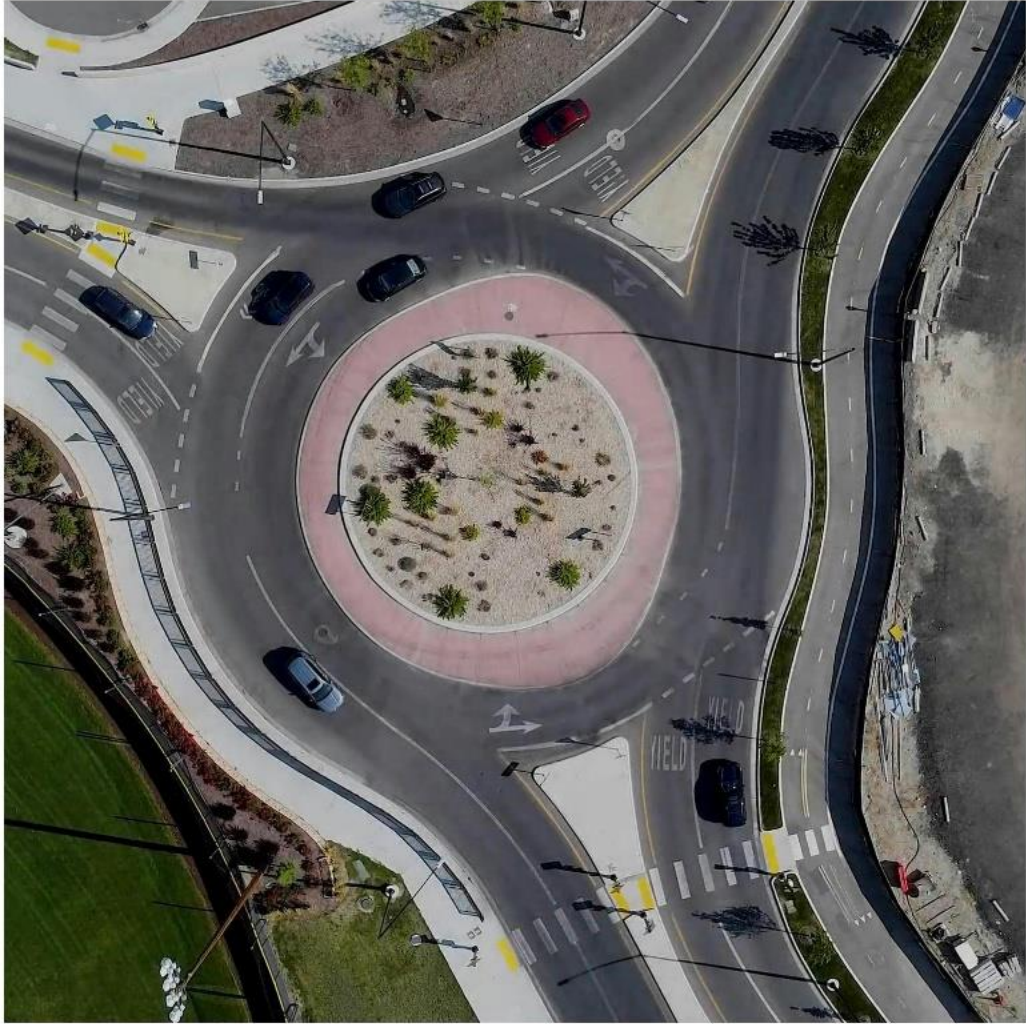
UX: User experience as **a core discipline**

MARKET ASSUMPTIONS



Proven feelings: Trust and comfort

IMPACT



Value **arbitrage.**

IMPACT



Parts of the industry becomes
a feature

IMPACT



New **truths.**

IMPACT



Winners **and** losers.

IMPACT



Old **and** New (for awhile)

IMPACT



Compete + Cooperate =
Co-opetition

And with all that...

THERE IS NO BETTER TIME TO BE IN
THE ACCESS CONTROL INDUSTRY!



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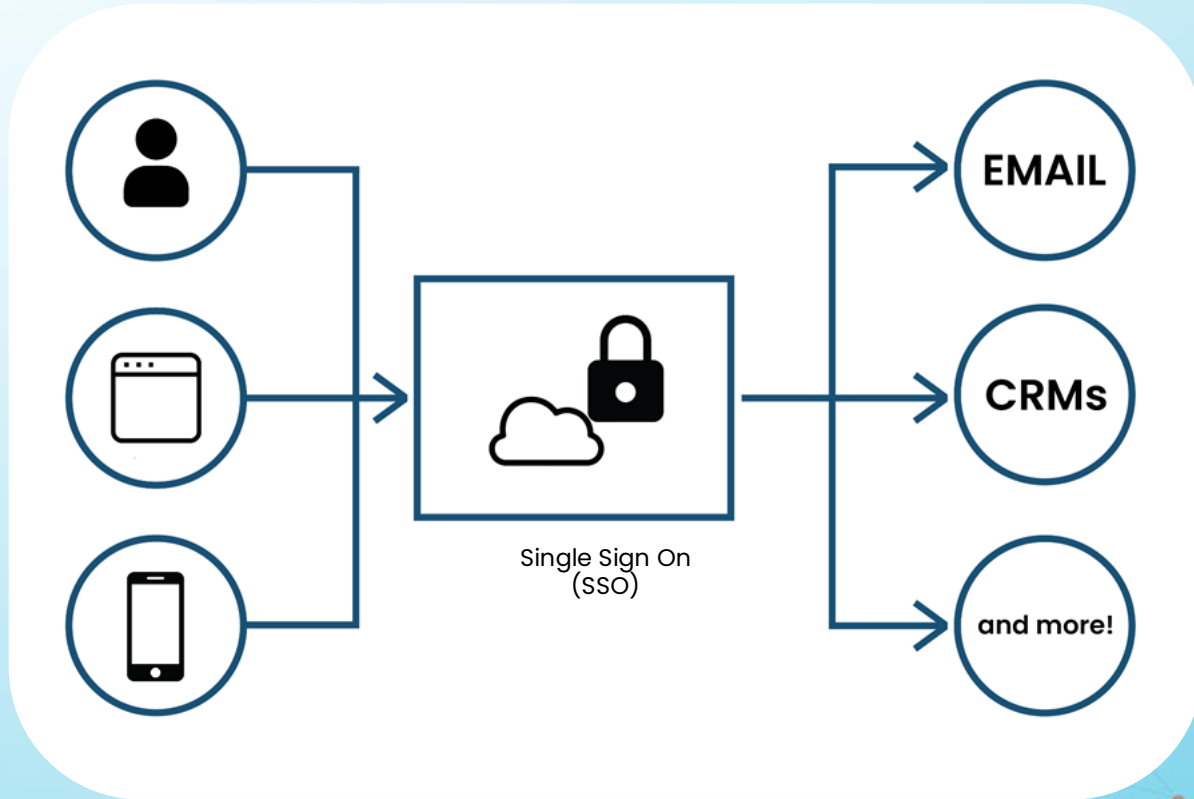
www.linkedin.com/in/robertlydic/



CONFIDENTIAL

Trends in Physical Access Control

All Access to Systems, IP, Documentation



All Access to Facilities



Converged Physical Credential

- 125 KHz Prox®
- DESFire® Ev3
LEAF Standards
NFC
- PIV
FIDO passkey



HYPR

IDEMIA

wavelynx

IDENTITY & PAYMENTS
SUMMIT

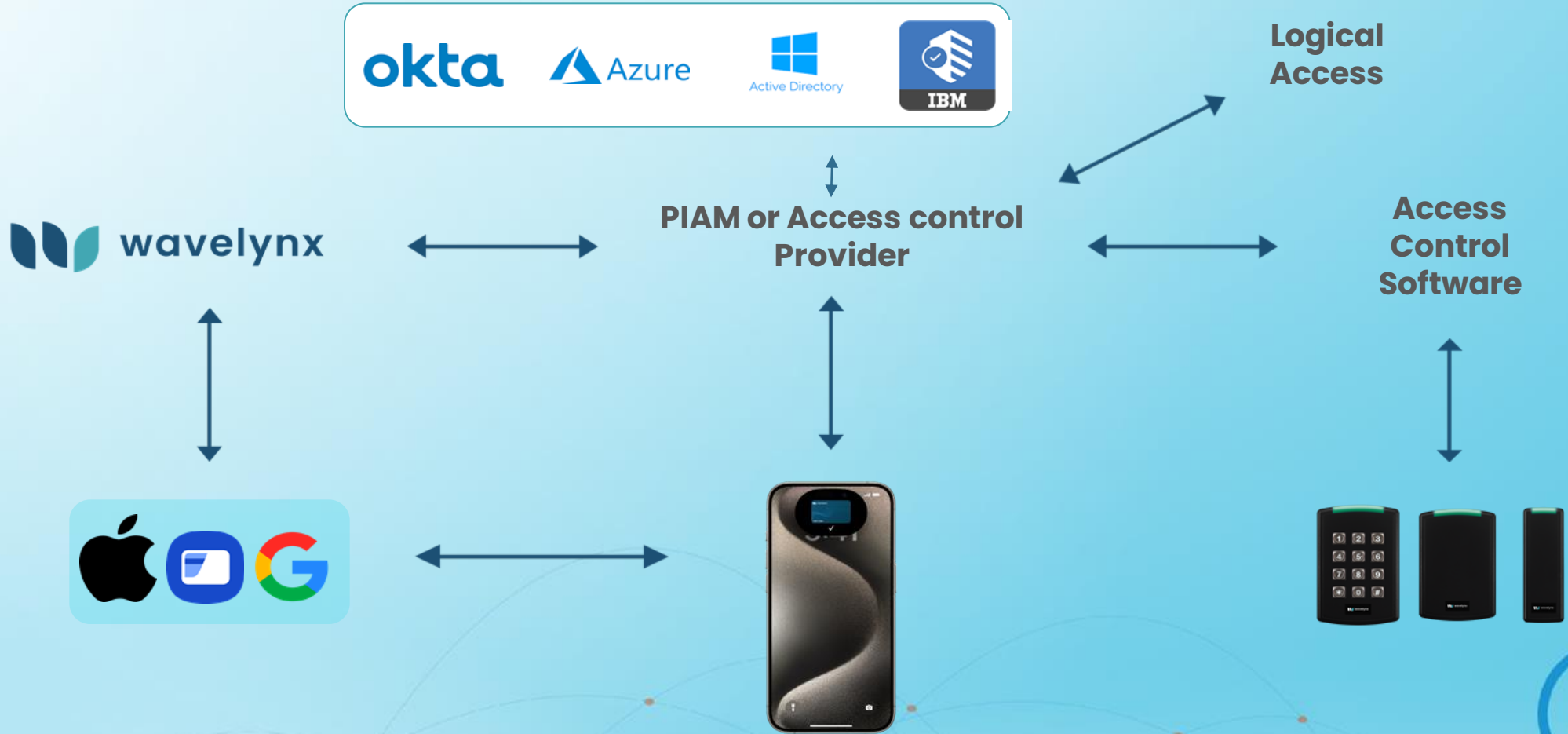
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Wallet Credentials

- More secure than all other credentials
- Superior provisioning and administration
- Unparalleled user experience for all users
- Wallet marries the SSO to Physical Security



Corporate SSO Identity



Trends in physical credentials

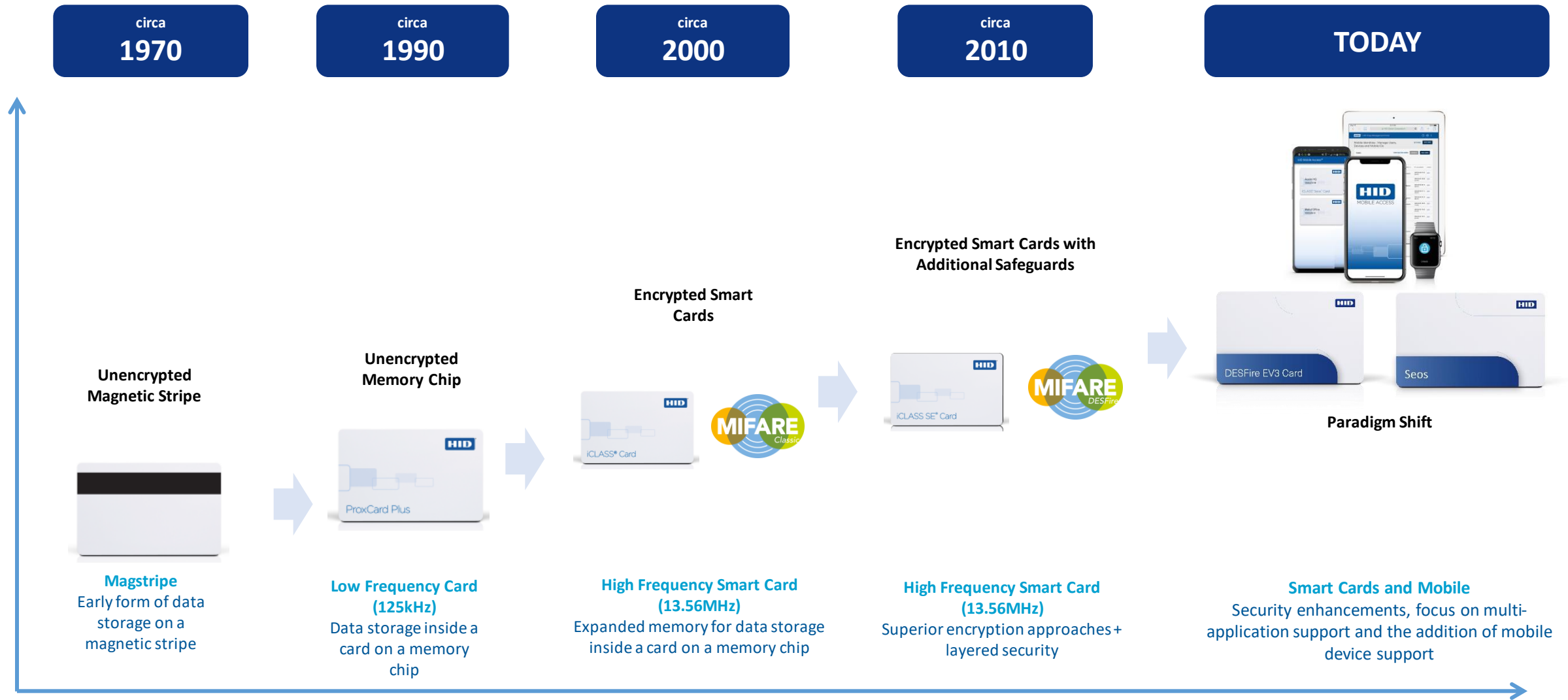
Troy Johnston

Director Strategic Alliances Americas

Powering the trusted identities of
the world's people, places & things

The Evolution of Credential Technology

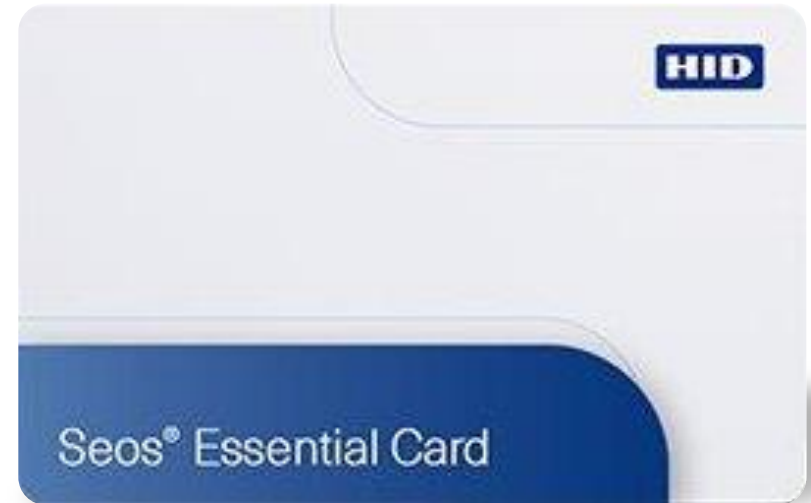
Security & Functionality



The Physical Card

- Physical, tangible, predictable
- They can be personalized, used as visual / passive confirmation of approved access
- Card administration is familiar and is baked into the business

Purpose built and great at fulfilling its function.



Credentials by the numbers North America

Prox

101M Sold in 2022

85M still predicted to be sold in 2027

-3.8% CAGR 2027

- OMDIA



Credentials by the numbers North America

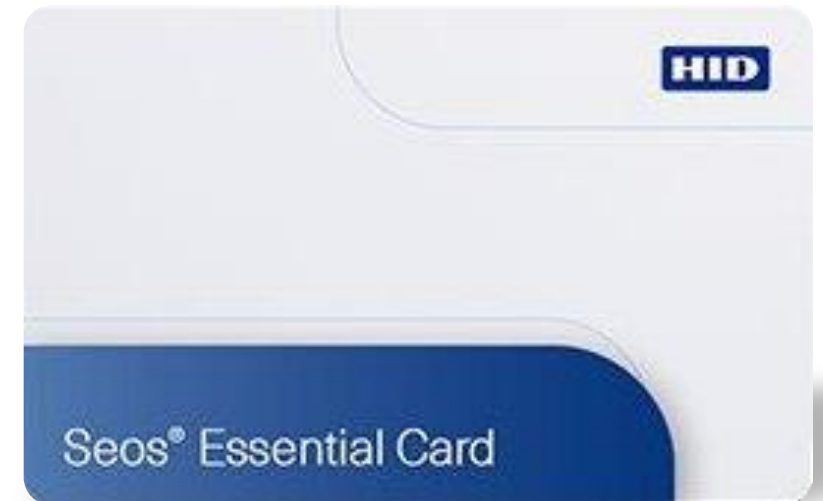
13.65Mhz

105M Sold in 2022

163M still predicted to be sold in 2027

6.8% CAGR 22-27

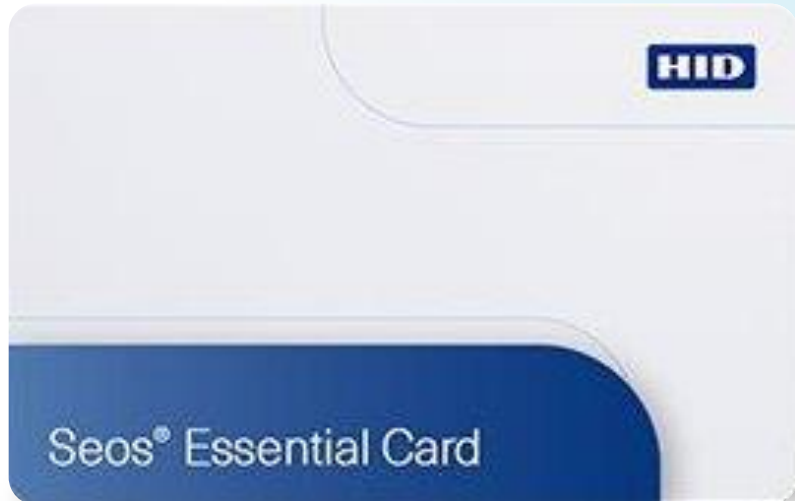
— OMDIA



Alignment with corporate initiatives

- Attract and Retain
- Digital Transformation
- Lean Operations
- Sustainability and ESG
- Asset Valuation

Asset Valuation
Digital Transformation
Sustainability and ESG
Attract and Retain



Credentials by the numbers North America

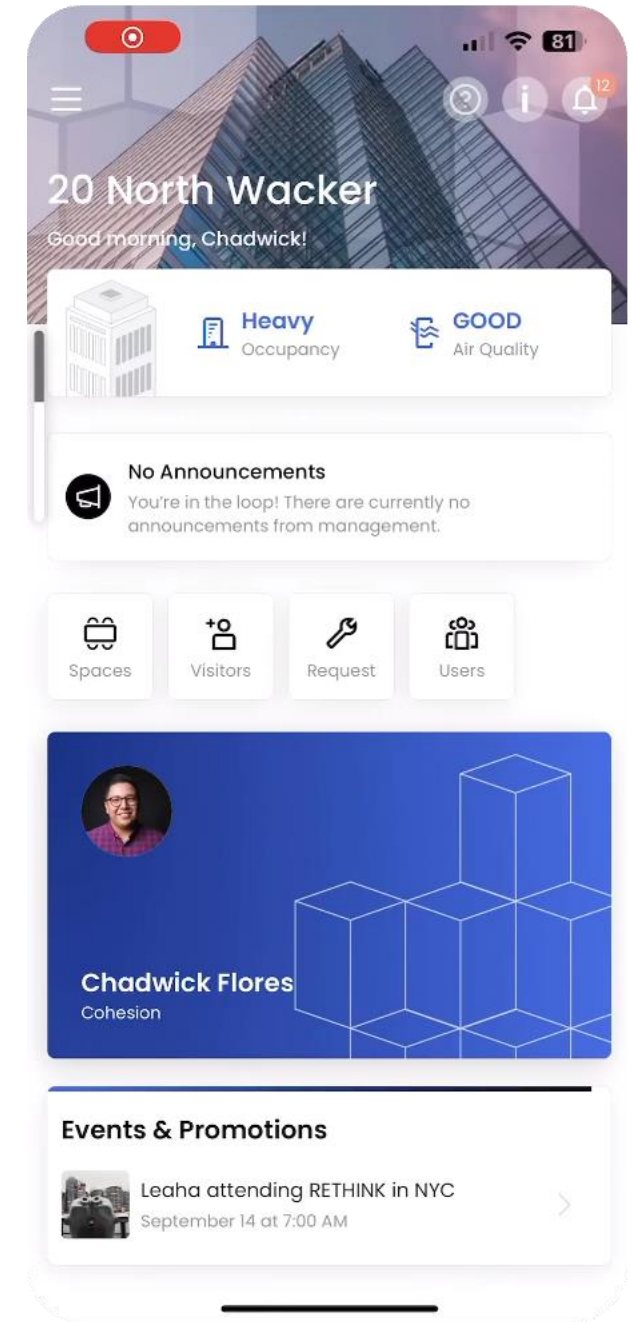
Mobile

13.9M Sold in 2022

69M still predicted to be sold in 2027

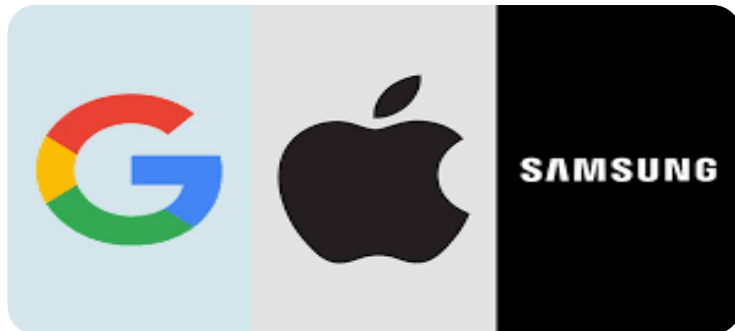
37.8% CAGR 22-27

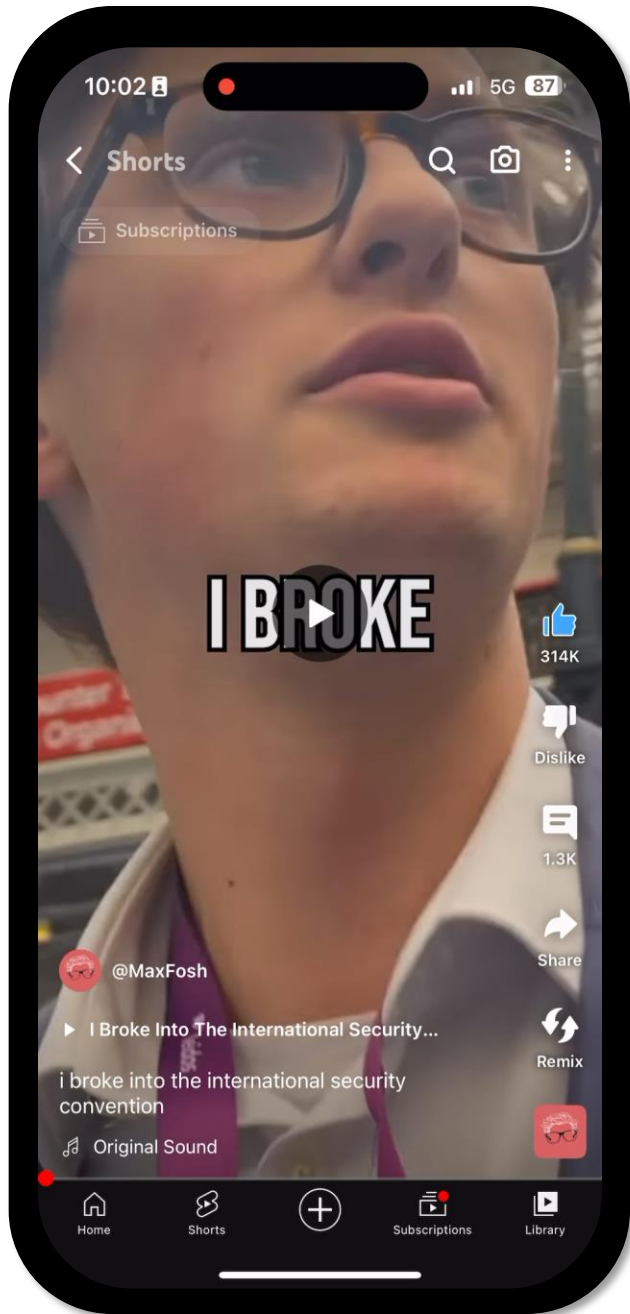
— OMDIA



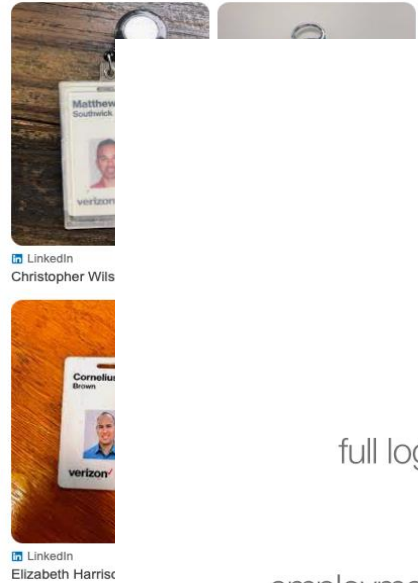
Transitional

- Physical credentials still have a place
- The need to be outwardly identified
- The growth of open and interoperability





🔍 Company ID Badge



{ back }

full logo
employment classification
employee number
* mock information
chip



Parting thought for the day



Manage the identity not the
modality





THANK YOU!

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mobile: +1 737 351 4545

Troy Johnston – Director of Strategic Alliances



Troy Johnston

Need help with mobile access? Wallet solutions, digital transformation of your w...



Trends in Physical Access Control

Ivan Golian

Technical Business Development Manager

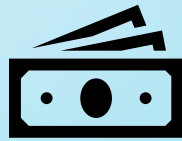
Gallagher



The Importance of Being Cyber Aware



\$9.5 Trillion



\$5.09 M



**449,855
36,004**



**13 Million
IoT**

How Gallagher Protects What Matters Most



Used Across
the Five Eyes
for the most
mission critical
systems



FIPS 140
Level 3
Validated
Cryptography
processor



Continuous
Pen Testing,
“WhiteHat”
security
researchers



Transparency.
Gallagher is a
CVE
Numbering
Authority
(CAN)



Security
Health Check.
Reduce risk,
gain insight.



Trends in Physical Access

Federal and Commercial Considerations for Trending
Access Control Solutions

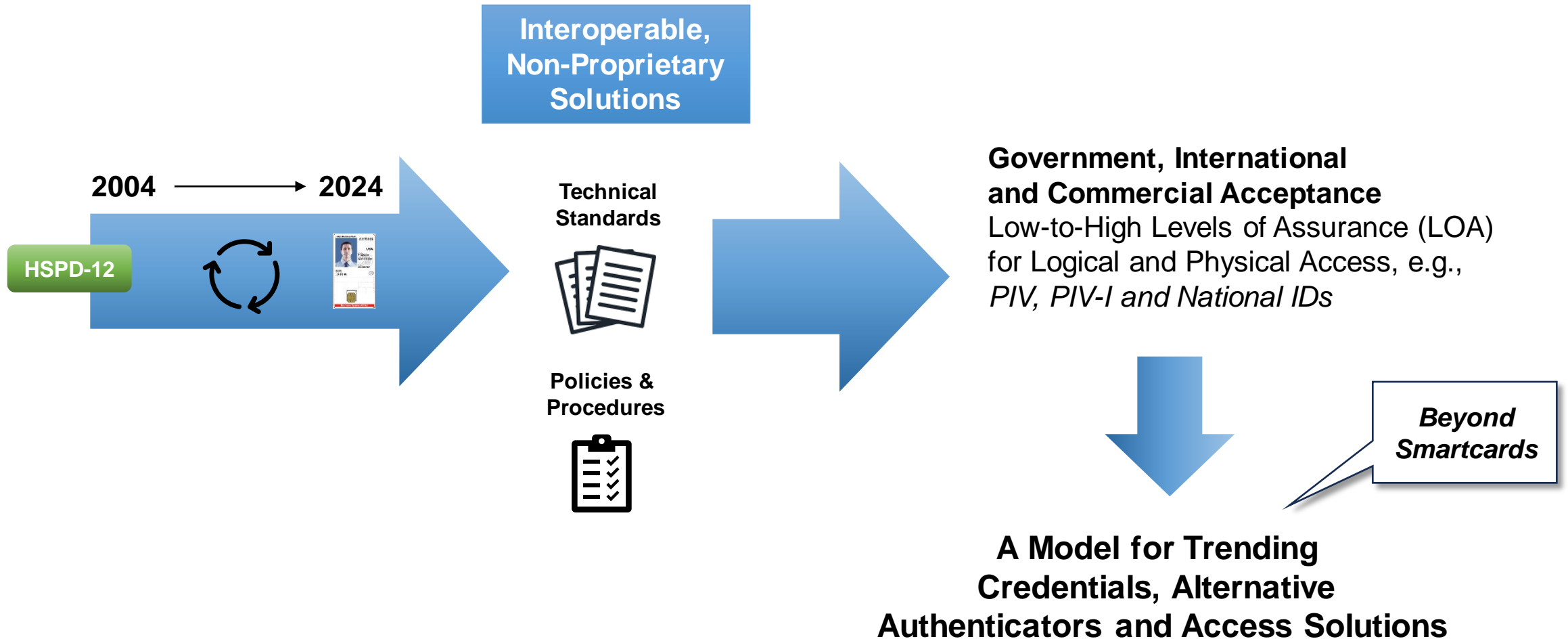




Topics

- A Little Legacy History and its Relevance
- Access Control Trends
- Standardized, Interoperable, Non-Proprietary Access Solutions

Federal PIV Smartcard Legacy



Physical Access Control Trends

Traditional PACS Focus (e.g., GSA APL)

- Physical Access Control Systems
- PIV/PIV-I Smartcards
- PACS Readers

Trending Access Control Considerations

- Contactless Tokens and Interfaces
- Mobile Devices (Smartphones, etc.)
- Smartcard Emulators
- New PACS Readers to support multiple interfaces
- MFA – Biometrics, etc.
- Cloud-Based Access Control
- Data Security and Privacy
- IoT Devices and Smart Buildings
- AI and Machine Learning
- Interoperability and Open Standards



Interoperable, Standards-based, Non-Proprietary Physical Security Solutions

Trending Credentials

- mDLs & ISO 18013-5
- FIDO
- Verifiable Credentials
- Decentralized IDs,
- Derived Credentials

Form Factors

- Tokens
- Mobile Devices (Smartphones, Tablets, Watches, etc.)
- Smartcards (still)

GOALS & BENEFITS

- Increased Security
- High Assurance
- Phishing Resistance
- Common solutions for LACS & PACS
- Lower-cost credentials and implementation
- Reduced dependency on locked-in, proprietary solutions

Interoperable Interfaces

- NFC
- NFC Connection Handover
- Bluetooth
- QR Codes
- Wi-Fi
- Cellular
- Google/Apple Wallets

Multi-Factor Authentication

- Biometrics
- Location (GPS, etc.)
- KBA
- Push Notifications/SMS





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Thank You



Trends in Physical Access Control

Ivan Golian

Technical Business Development Manager

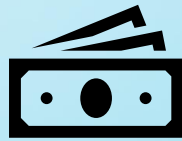
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Security
Health Check.
Reduce risk,
gain insight.



IDENTITY & PAYMENTS
SUMMIT