

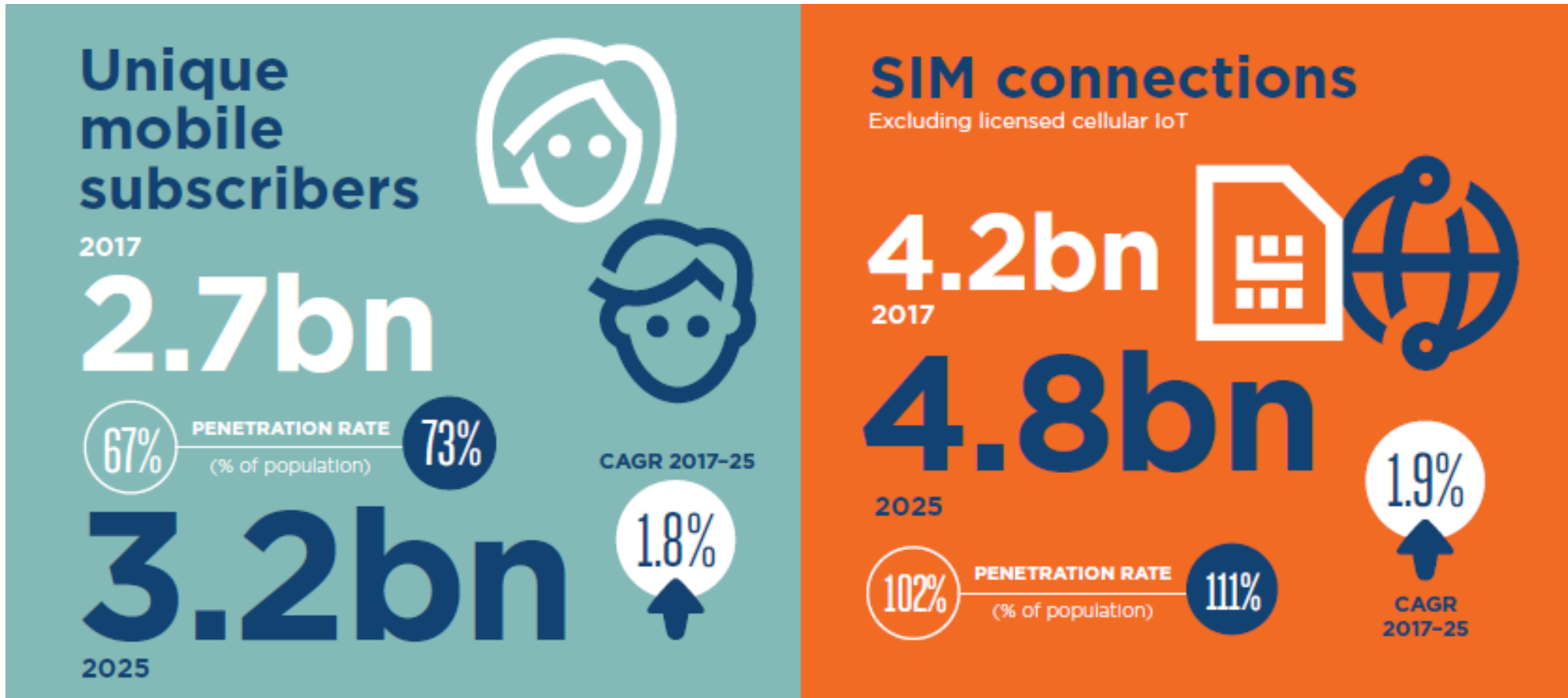
Internet and Digital Landscape

Julian Gorman, Head of Strategic Engagement, Asia-Pacific

Identity Innovation Lab

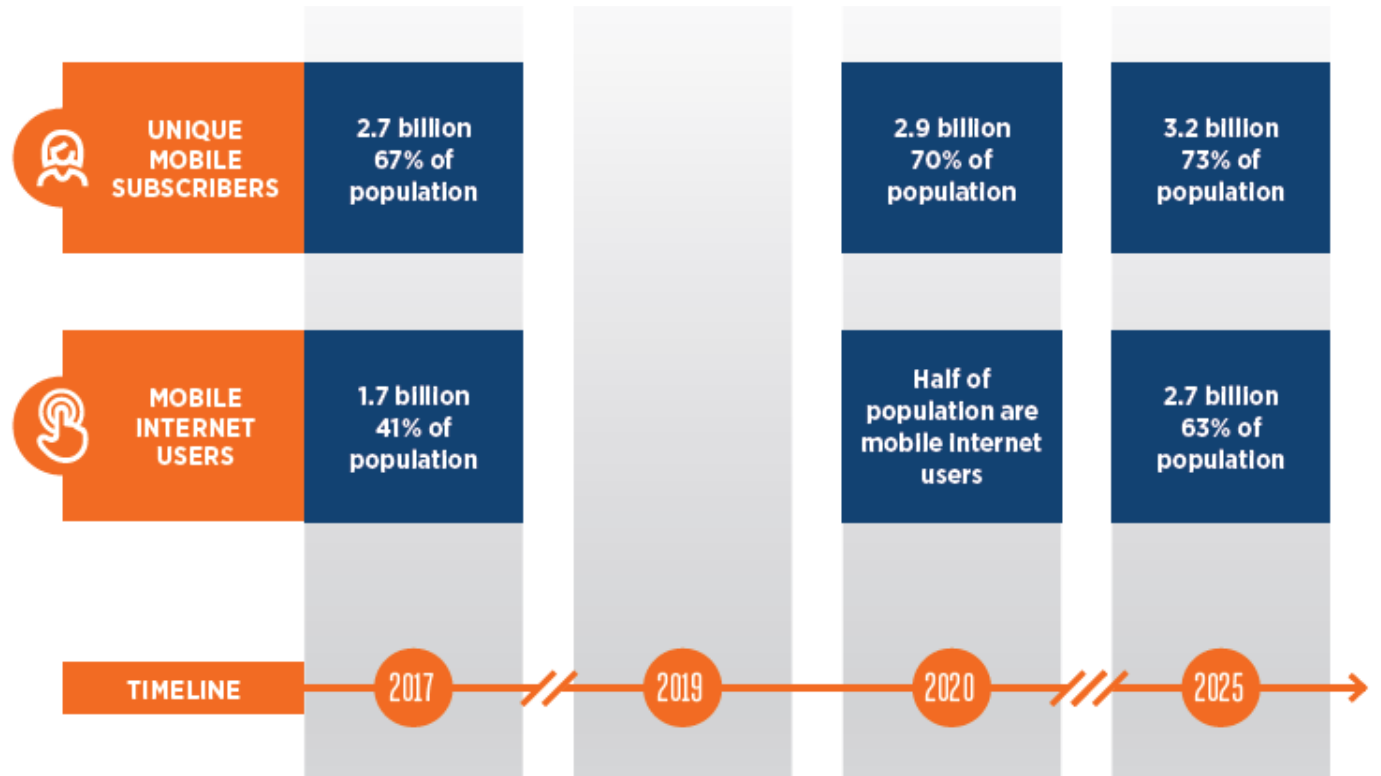
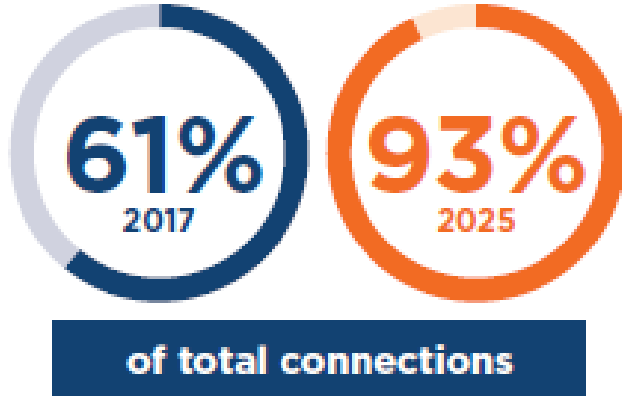
MWC Shanghai 2018

Asia's digital landscape leads the world

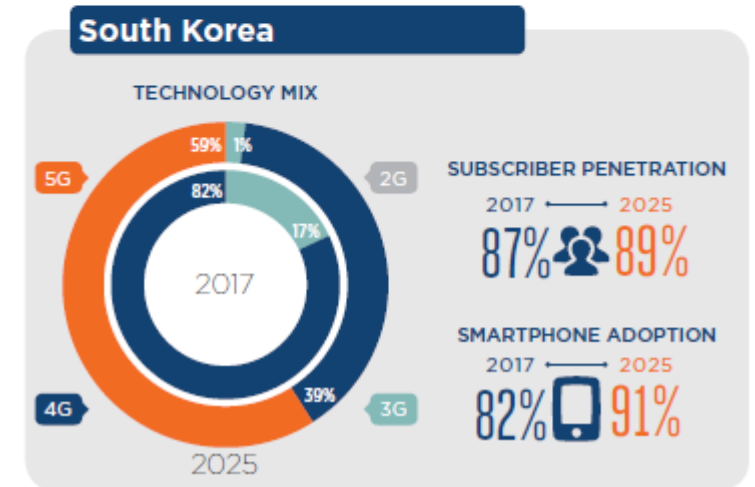
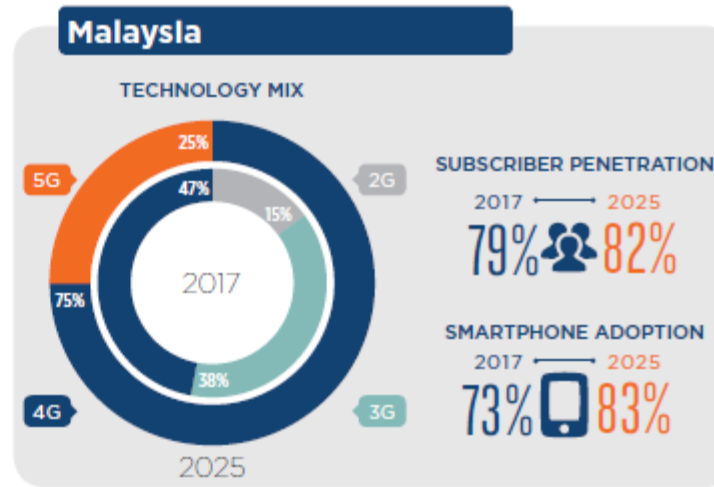
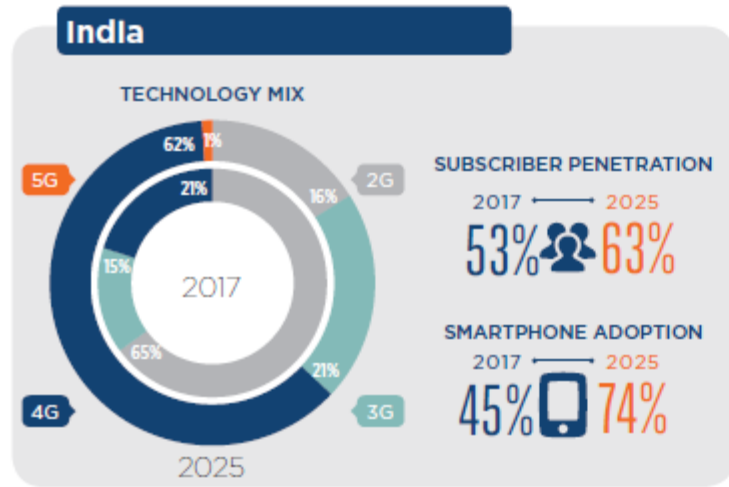
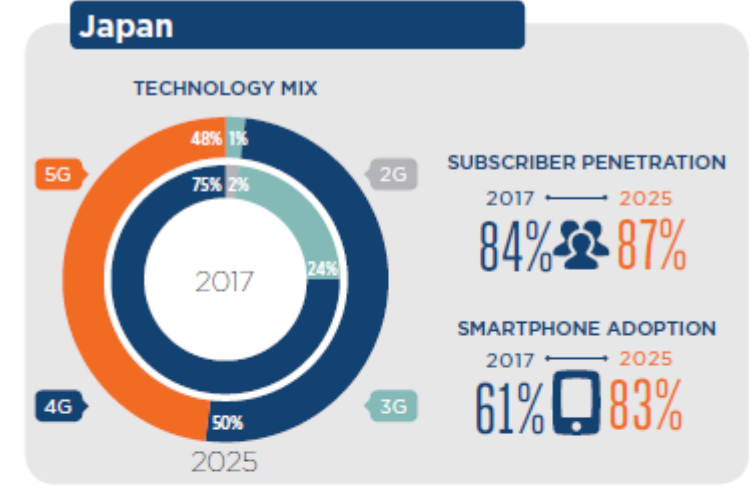
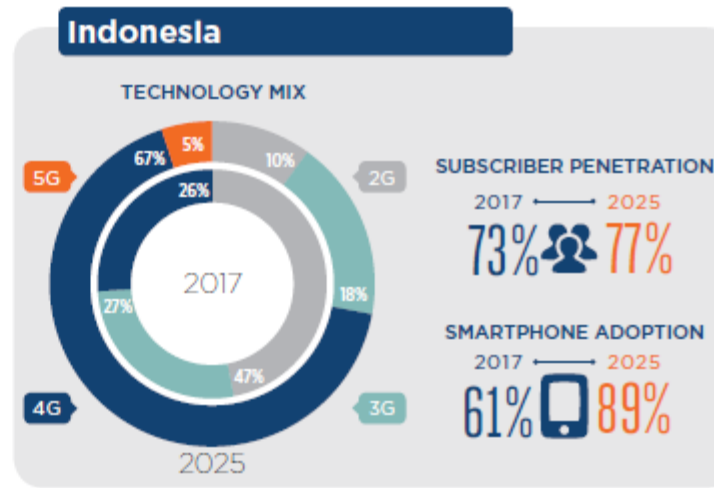
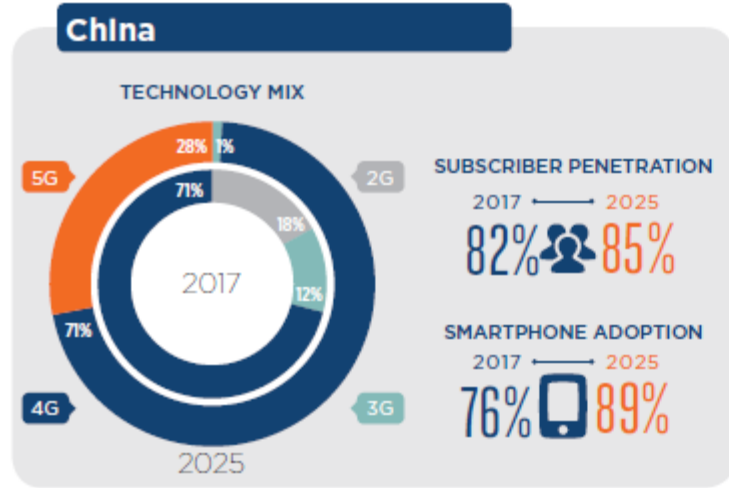


Accelerating the move to being online

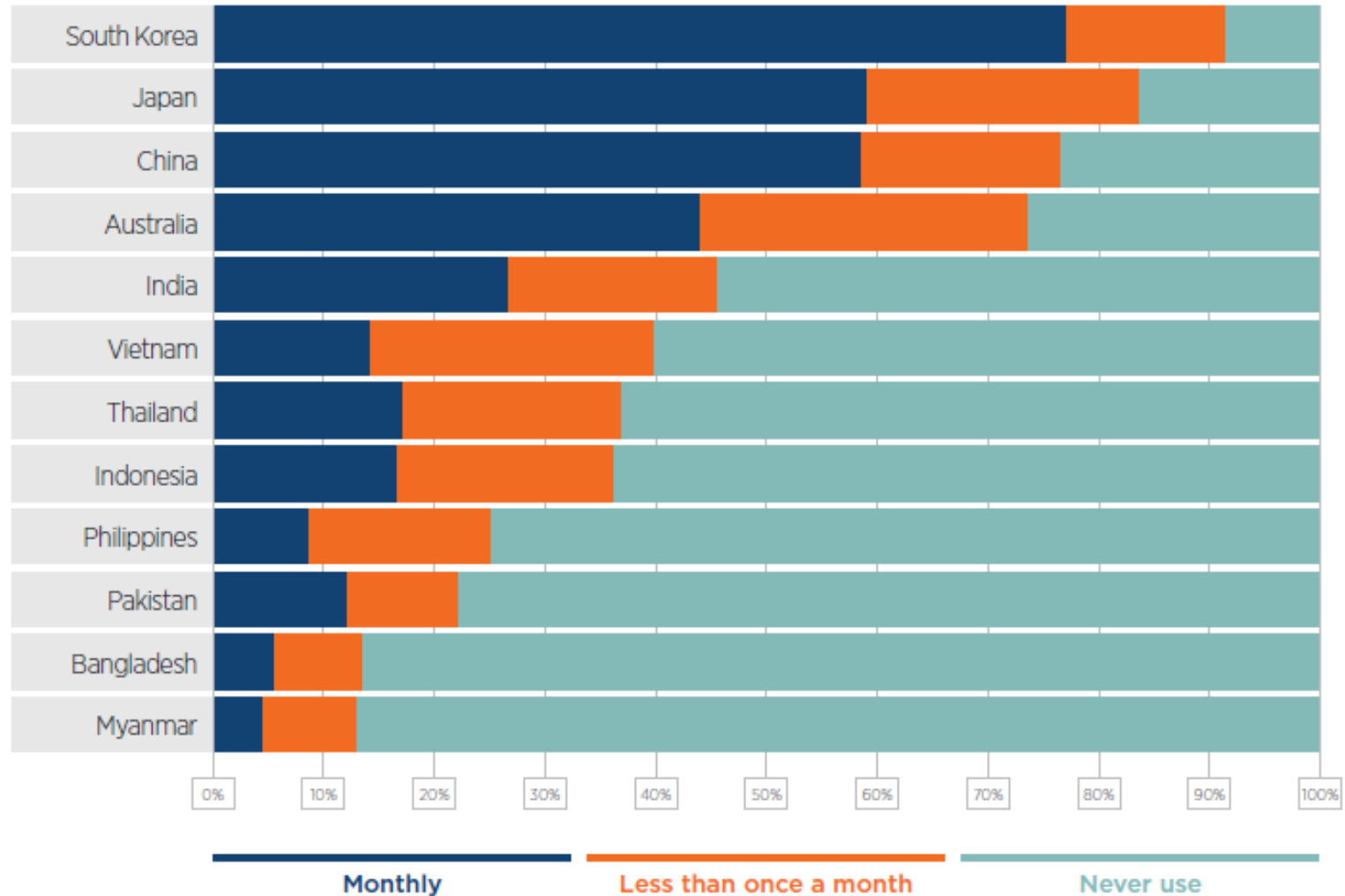
Mobile broadband connections



North East Asia leading adoption metrics



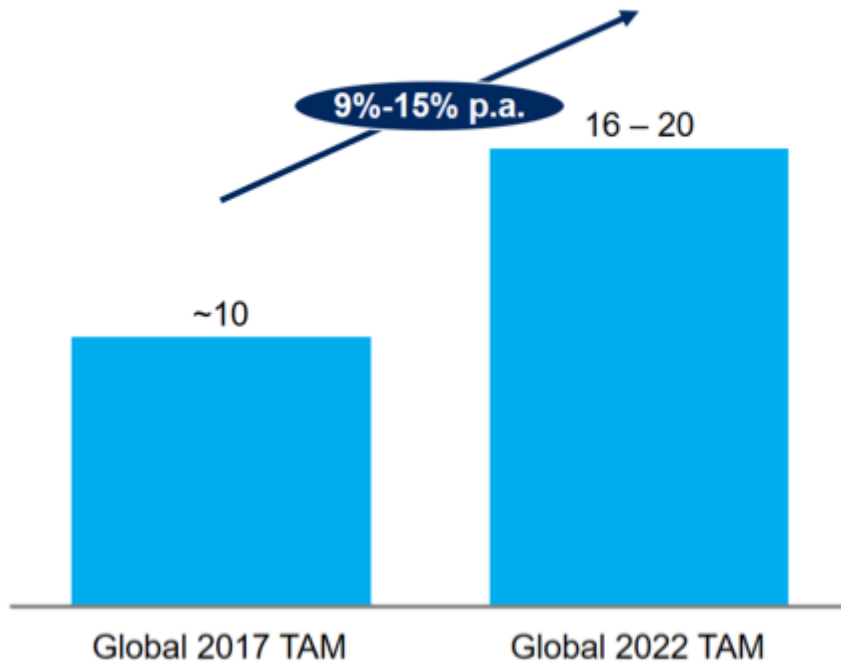
Smartphone adoption driving online engagement



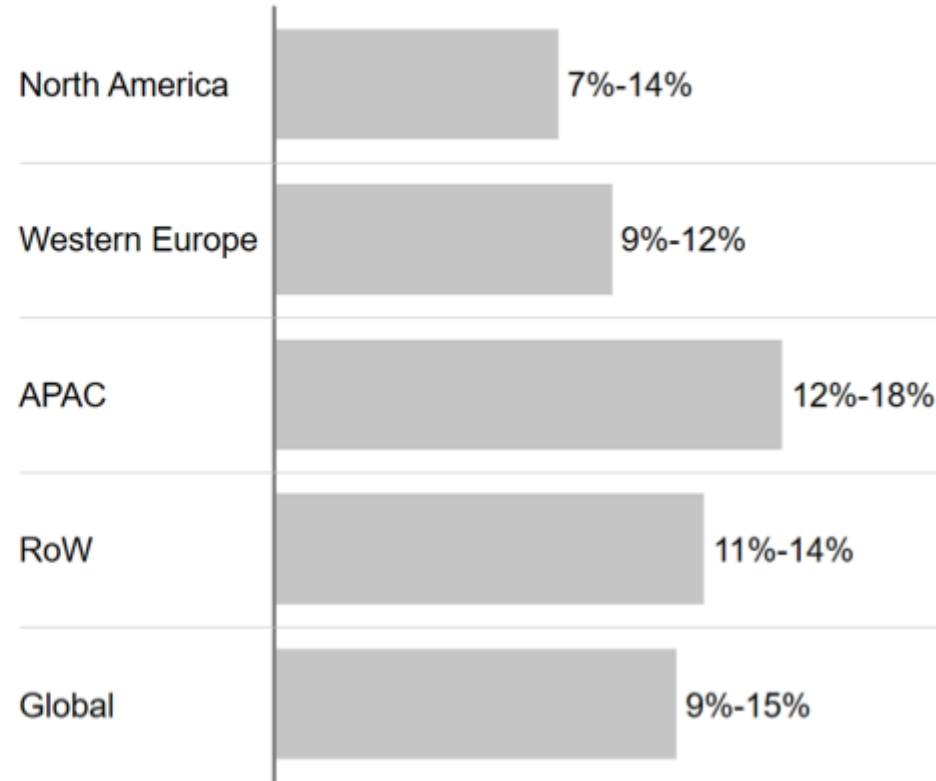
How often do purchase or order goods online from Mobile Phone?

Asia leading growth for verification of digital identity

Estimated Total Addressable Market
\$ Billions



Estimated TAM Growth Rates by Region
CAGR



Fuel by McKinsey, June 2018