FROST & SULLIVAN

BEST PRACTICES

2026

GLOBAL BIOMETRIC SOLUTIONS

TECHNOLOGY INNOVATION LEADERSHIP

Daon®

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Daon excels in many of the criteria in the biometric solutions space.

RECOGNITION CRITERIA

Business Impact	*Technology Leverage*
Financial Performance	Commitment to Innovation
Customer Acquisition	Commitment to Creativity
Operational Efficiency	Stage Gate Efficiency
Growth Potential	Commercialization
Human Capital	Application Diversity

The Transformation of the Biometric Solutions Industry

The biometric solutions industry is entering a new phase in which verification, authentication, and fraud prevention can no longer operate as isolated events. Enterprises, governments, financial institutions, telecom operators, and travel providers increasingly require assurance that a genuine person is going through an onboarding process, remains trustworthy during authentication, and their identity can be securely reverified during high-risk interactions. At the same time, synthetic identities, deepfakes, presentation attacks, and account takeover attempts are exposing the limitations of legacy identity controls.

This shift places biometrics at the center of digital trust, but also raises the standard for technology providers. Facial, voice, document, liveness, and behavioral signals must work in tandem across mobile, web, contact center, kiosk, and in-person channels without adding unnecessary friction or creating new operational complexity. Yet the market challenge is not only accuracy. Customers must balance fraud prevention with accessibility, regulatory compliance, privacy, and user experience. A biometric process that creates abandonment, fails to adapt across channels, or cannot scale globally can undermine the very trust it is meant to establish.

Daon addresses these market requirements through a biometric-first identity architecture designed for continuous assurance across the full customer lifecycle. Its portfolio combines identity verification, facial authentication, voice biometrics, multi-factor authentication, document validation, liveness detection, and deepfake defense within interoperable platforms that support SaaS, hosted, cloud, and on-premises deployments. The biometric market is no longer defined by whether an organization can verify a person once, but by whether it can maintain trust in that person across every future interaction.

Setting a Higher Benchmark for Biometric Accuracy and Trust

Daon's technology leadership is rooted in more than 25 years of biometric specialization. This foundation differentiates the company from providers that began with identity workflow, compliance automation, or document verification and later added biometric capabilities. Daon developed from core biometric science, including facial recognition, fingerprints, voice, and document-linked identity, before expanding into broader identity orchestration. That sequence matters because its platform is built around the integrity of the human signal, not merely around completing a transaction.

The company's R&D model reinforces this distinction. Its Dublin-based research organization includes a large number of specialized biometric scientists working across face, voice, document intelligence, liveness, injection attack detection, and vertical deployment requirements. This depth helps convert biometric research into practical enterprise capabilities, including image quality assessment, presentation attack defense, document forensics, and biometric enrollment. In a market where many vendors compete on workflow breadth or dataset scale, Daon's stronger claim is that it improves the reliability of identity assurance itself, supported by a deep intellectual property portfolio with hundreds of patents.

Independent testing provides a credible proof point. In August 2025, Daon's facial image quality assessment algorithm ranked first globally in the NIST Face Analysis Technology Evaluation Quality test, outperforming 56 other submitted products. In the critical 5% scenario, which measures how effectively an algorithm identifies and removes the lowest-quality images before matching, Daon reported a false non-match rate of 0.0030, showing its ability to identify poor-quality images before they affect downstream face matching, liveness detection, watchlist screening, or fraud analysis. This performance is important because biometric accuracy starts before matching occurs. Better image quality assessment improves onboarding reliability, high-value transaction protection, border and travel use cases, and deepfake defense. In biometrics, trust begins at capture, and Daon's NIST performance shows that the company is strengthening identity assurance at the earliest point of the decision chain.

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> ***Research Analyst, Security***

Daon also pairs biometric performance with responsible AI governance. Its ISO/IEC 42001 certification for AI management across digital identity and fraud prevention systems demonstrates a mature approach to model governance, monitoring, risk assessment, and continuous improvement. This is especially relevant as AI becomes embedded in biometric matching, document verification, liveness detection, and risk analysis. Daon's distinction is not simply that it applies AI to identity, but that it combines AI performance with the governance discipline required for high-assurance biometric decisions.

Orchestrating Biometrics Across the Full Identity Lifecycle

Daon's most distinctive technology contribution is its Identity Continuity model. The approach creates a single, secure customer identity that can be used from onboarding through authentication, account recovery, contact center interactions, workforce access, and step-up verification. Rather than treating identity proofing as a one-time checkpoint, Daon enables organizations to maintain and apply trusted biometric and identity signals across the full lifecycle of a user. This architecture addresses one of the market's most important gaps, how fraud often occurs between identity events, not only during the first verification.

The company's portfolio gives this model operational depth:

- **xProof** combines document verification, facial biometrics, liveness detection, NFC, mobile driver's license support, and watchlist capabilities for onboarding;
- **xFace** provides server-based facial authentication with fraud detection for high-assurance use cases;
- **xAuth** adds FIDO-certified and other multi-factor authentication options;
- **xVoice** supports active and passive voice authentication with fraud detection; and
- **xDeTECH** provides real-time synthetic audio detection for voice channels without requiring biometric enrollment or personally identifiable information.
- **VeriFLY** extends Daon's document capabilities to support travel documentation, creating a comprehensive self-check-in process.

These products do not simply broaden the catalog. They allow face, voice, device, document, and credential intelligence to reinforce one another across channels and moments of risk.

Daon's orchestration layer strengthens the practical value of this architecture. The TrustX platform enables no-code, drag-and-drop workflow creation, allowing organizations to build, test, and modify identity journeys without lengthy development cycles. The IdentityX platform supports customers that require on-premises or private cloud control, while TrustX addresses buyers seeking SaaS speed and lower operational overhead. The company's alignment with FIDO standards, eIDAS 2.0 requirements, mobile driver's licenses, and verifiable credential frameworks further supports its standards-based approach to digital identity. Few biometric providers have turned multimodal biometric intelligence into a configurable lifecycle platform with this level of orchestration maturity.

A Growth Model Built on Biometric Trust, Scale, and Partnerships

Daon's innovation is reinforced by broad commercial adoption and sustained business execution. The company serves approximately 900 customers across six continents, secures more than 2 billion identities, and supports more than 250 million daily authentications. This scale demonstrates more than customer reach. It shows that Daon's biometric technology model has translated into repeatable market performance across high-volume identity environments. While many providers compete narrowly in identity proofing, authentication, or fraud detection, Daon has operationalized biometric innovation as daily identity infrastructure.

The financial services industry remains one of Daon's strongest customer proof points. The company supports leading banks, investment firms, credit unions, and payment institutions across onboarding, biometric authentication, transaction protection, contact center security, and account recovery. Daon's growth potential also comes from its ability to apply the same biometric trust layer across sectors while adapting it to each industry's operating requirements. In travel and hospitality, xProof, delivered through TrustX, processes identity documents and biometrics, while VeriFLY extends this foundation by assessing itinerary-based non-identity document requirements and enabling travelers to complete those checks inside the provider's app before check-in. Workforce Identity Fraud Prevention applies identity verification, passkey-based authentication, step-up verification, and reverification to risks such as synthetic candidates, deepfake-enabled hiring fraud, and helpdesk account takeover. The company's technologies also support telecom, government, healthcare, regulated services, digital banking, and age verification environments. This breadth demonstrates that Daon's platform is not tied to a single vertical, but adaptable to any environment where identity assurance must be accurate, low-friction, and persistent.

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Partnerships further strengthen Daon's commercialization model. Collaborations with ebankIT, Giesecke+Devrient, SmartSearch, Vega IT, and travel industry stakeholders aligned with IATA initiatives embed Daon's biometric capabilities into digital banking, regulated onboarding, eSIM security, travel document validation, and cross-channel customer journeys. These partnerships validate Daon's role as an enabling identity layer within broader digital ecosystems. Daon's strongest contribution is its ability to commercialize biometrics as trusted infrastructure, not as isolated tools, across the customer, workforce, travel, and financial identity lifecycle.

Conclusion

Daon demonstrates technology innovation leadership through a biometric-first architecture that connects identity verification, facial authentication, voice biometrics, document intelligence, liveness detection, and deepfake defense across the full identity lifecycle. Its NIST performance, AI governance certification, and global customer base provide strong evidence of both technical credibility and execution maturity.

The company's Identity Continuity model is especially relevant as enterprises move away from fragmented identity checks and toward persistent, cross-channel assurance. Daon's ability to combine accuracy, orchestration, deployment flexibility, and real-world adoption positions it strongly in the global biometric solutions industry.

With its strong overall performance, Daon earns Frost & Sullivan's 2026 Technology Innovation Leadership Recognition in the global biometric solutions industry.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Recognition identifies the company that has introduced the best underlying technology for achieving remarkable product and customer success while driving future business value.

Best Practices Recognition Analysis

For the Technology Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** Industry Leadership

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)