

F R O S T & S U L L I V A N

FINTECH

Fuelling the Financial Services Revolution





Digital disruption is shaping the future of the financial services sector. A combination of innovative new entrants and the application of new technologies is generating new growth opportunities. Established market players - including banks and financial institutions - are reinventing themselves to remain relevant in a fast-changing environment. The challenges are substantial, but the potential rewards are huge - technology is driving the financial services revolution.

Are you ready to enter this digital age? Our global team of thought leaders, industry experts, and consultants allow you to understand FinTech market dynamics and provide you with the insight and confidence to drive disruptive changes that will shape your future business strategy.

For **Technology Providers**, we can support your go-to-market strategy and ensure that you are fully aligned with industry trends.

For **Financial Services market participants**, we can help you harness emerging technology trends to drive your business to the next level.

FINTECH

Reinventing the Future of Payments and Banking: Survive or Die

The Financial Technologies sector has risen six-fold over the past two years, with an estimated value of €18billion in 2015. The sector grew by 71% from 2014-15 alone.

FINTECH IS A GLOBAL PHENOMENON

The number of mobile payments doubled from 2014-2015

High growth rates in adoption of contactless payment solutions signal an important inflection point for the payments industry

The Cashless World: Cashless transactions are expected to increase by 50% between 2016 and 2025

180 million contactless transactions on London's transportation network since its launch (Sept 2014-Sept 2015)

331% year-on-year growth in the number of contactless payments in 2014

Global non-cash transactions will reach 630.6 billion in 2020. North America and Europe will only represent 45% of total transactions

Payments via wearable devices set to increase exponentially over the next 5 years

The Virtual Currency Boom: Bitcoin has the highest market cap among all the virtual currencies circulated till date (\$3.4 billion)

WHY FROST & SULLIVAN?

Research and Consulting Capabilities Combine to Provide Powerful Offerings across Industry Value Chains

Frost & Sullivan's FinTech practice combines continuous coverage of the financial services with deep expertise in vertical markets and technologies to identify how industries will transform, and how market stakeholders can make this a reality. Our capabilities not only cover the Descriptive (what happened) and Diagnostic (why did it happen) but go well beyond to help you become Predictive (what will happen) and Prescriptive (what should I do).



MOBILE
MONEY/
PAYMENTS

DIGITAL
DISRUPTION
IN FINANCIAL
SERVICES

THOUGHT
LEADERSHIP
AREAS

EVOLVING
INSURANCE
MARKET
DYNAMICS,
INCLUDING THE
RISE OF UBI

DISRUPTIVE
AUTHENTICATION
AND
BIOMETRICS

THE IMPACT
OF EMERGING
TECHNOLOGIES:
THE BLOCKCHAIN
ARTIFICIAL
INTELLIGENCE
QUANTUM
COMPUTING

OUR RECENT INSIGHTS:

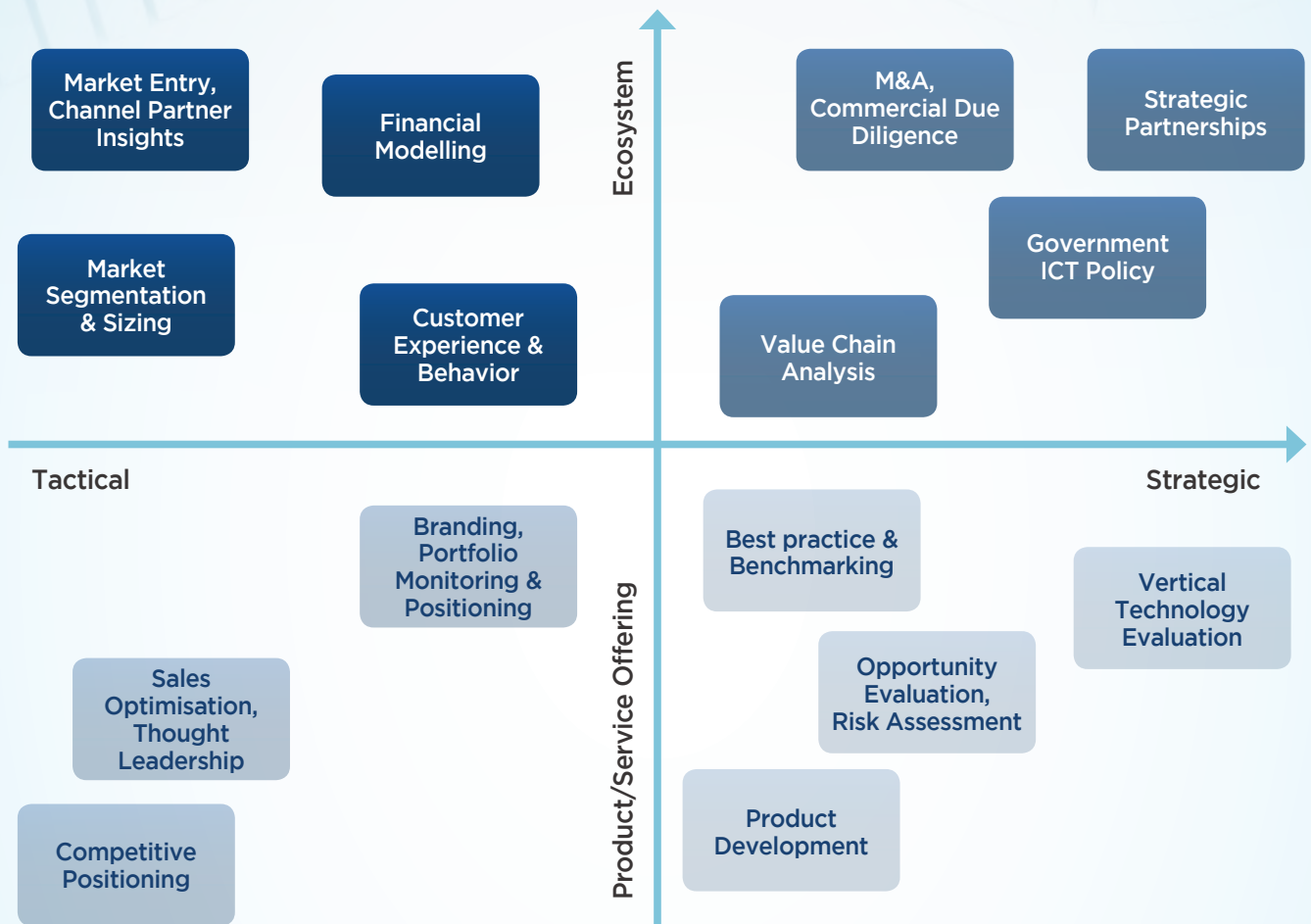
- Digital Disruption in the Financial Services Sector
- Artificial Intelligence in Financial Services
- The Future of IT in Finance
- The Wearable Future: Revolutionizing Digital Payments
- Blockchain: What You Need to Know
- Opportunities in the Micropayments Market
- The Payment Processing Platform Market

OUR FORTHCOMING INSIGHTS:

- Evolution of RegTech in Financial Services
- The InsureTech Revolution
- Fintech in Europe: Trends, Forecasts and Analysis
- Platforms Powering Fintech in Europe
- Growth Opportunities in the European Fintech Arena
- PayTech in Europe: Transaction Transformation
- Banking-as-a-Service: Bringing Agility and Flexibility to Financial Services
- SecureTech: The Vital Pillar for Fintech Success

OUR CONSULTING ADVISORY SERVICES

Frost & Sullivan not only describes and diagnoses your challenges, we go well beyond by predicting future growth opportunities and prescribing a customised solution for your organisation. With the breadth and depth of our capabilities, we are best positioned to help you through all the stages of digital transformation.



OUR GROWTH WORKSHOPS

Frost & Sullivan delivers unique growth workshops to identify and exploit the opportunities of digital transformation by drawing on our extensive knowledge of both ICT and industry trends. Our growth workshops help companies gain first mover advantage when they pursue emerging opportunities.

We also support executives who want to align key internal stakeholders to achieve a common goal. In addition, we help technology end users shape their digital strategy and make critical choices.

Frost & Sullivan workshops are designed around our clients' needs. We can attend client strategy days as expert external keynote speakers, or we can fully facilitate a strategy workshop. A follow-up report with an action plan and steps are an important part of our service.

FROST & SULLIVAN

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Frost & Sullivan, the Growth Partnership Company, works in collaboration with clients to leverage visionary innovation that addresses the global challenges and related growth opportunities that will make or break today's market participants. For more than 50 years, we have been developing growth strategies for the global 1000, emerging businesses, the public sector and the investment community. Is your organisation prepared for the next profound wave of industry convergence, disruptive technologies, increasing competitive intensity, Mega Trends, breakthrough best practices, changing customer dynamics and emerging economies? Contact Us.