

# Namirial

## Digital Trust Services Landscape

Market of Electronic Identification & Trust Services (#eIDAS)



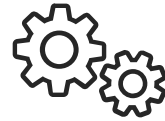
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Director  
Marketing & Communication

Namirial

June 22, 2022 – Omniscure – Berlin

# Digital Trust Services - Segments



Digital Transaction Management Platforms  
Signature **Workflow** Orchestration ( Document review / completion & signing )



Identification and Authentication



E-Certificates for **E-Signatures** and **E-Seals**



Biometric **E-Signatures**



E-Time Stamp



Certified Communication / Registered Delivery



Regulated in EU  
under Regulation  
910/2014 eIDAS



Long-Term Archiving

eIDAS 2.0 (2023/24)

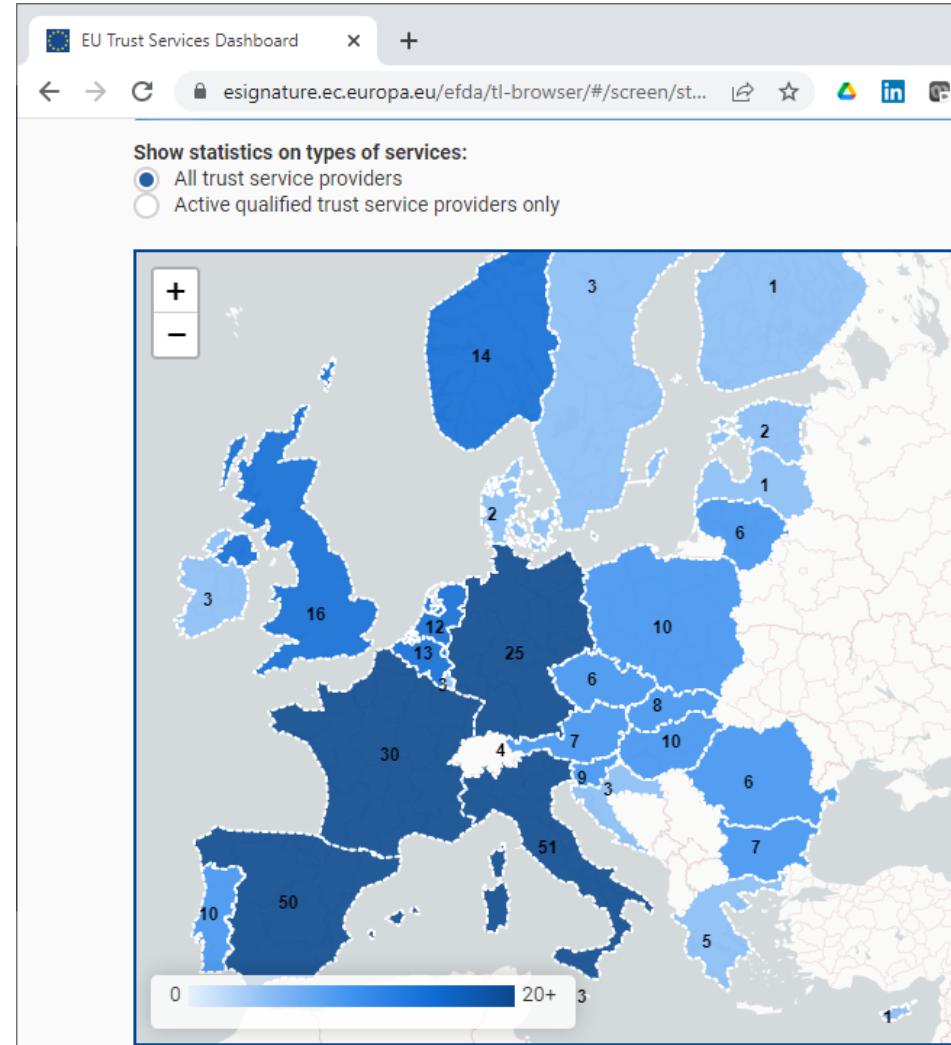
# Trust Service Providers in EU & EEA

The screenshot shows the 'Trusted List Browser' interface. It includes a search bar with three options: 'Search a trust service by type', 'Search a trust service by name', and 'Search a trust service with a signed file'. Below the search bar is a table of 'Trusted Lists' for various EU member states, showing the country name, flag, and issue date.

Country	Issue date
Austria	2022-04-07
Belgium	2022-03-17
Bulgaria	2022-04-27
Croatia	2022-02-16
Cyprus	2022-03-30
Czech Republic	2022-05-12
Denmark	2022-01-11
Estonia	2022-03-21
Finland	2021-12-08
France	2022-05-11
Germany	2022-05-05
Greece	2022-03-24
Hungary	2022-05-02
Iceland	2022-04-25
Ireland	2022-04-26
Italy	2022-05-09
Latvia	2021-12-03
Liechtenstein	2022-04-25
Lithuania	2022-01-24
Luxembourg	2022-04-21
Malta	2022-03-15
Netherlands	2022-03-30
Norway	2022-04-08
Poland	2022-05-06
Portugal	2022-02-15
Romania	2022-02-25
Slovakia	2022-03-24
Slovenia	2022-03-23
Spain	2022-04-22
Sweden	2022-02-03

<https://esignature.ec.europa.eu/efda/tl-browser/#/screen/home>

Screenshots taken May 19, 2022



<https://esignature.ec.europa.eu/efda/tl-browser/#/screen/statistics>

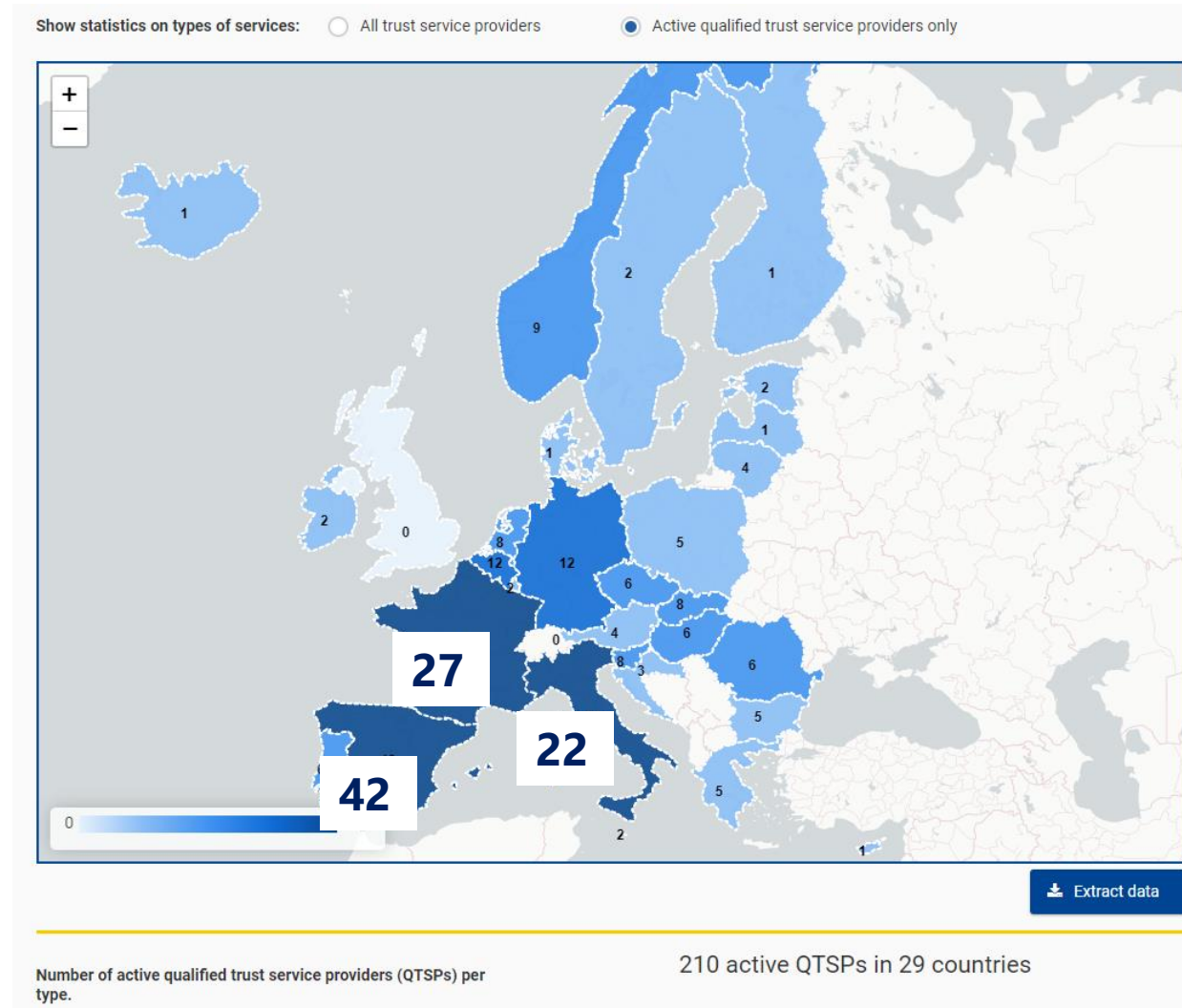
# Qualified Trust Service Providers (QTSP) in EU & EEA

Italy is QTSP country #3 - behind Spain and France

Those 3 countries have 43% of the active QTSPs due to an active role of their respective Public Admins to foster digitization & usage of digital certificates for the delivery of citizen services (subsequent familiarity of the private sector with these digital solutions)

A Swiss QTSP is operating in EU/EEA via its subsidiary in Austria

UK providers left eIDAS in 2020 because of Brexit



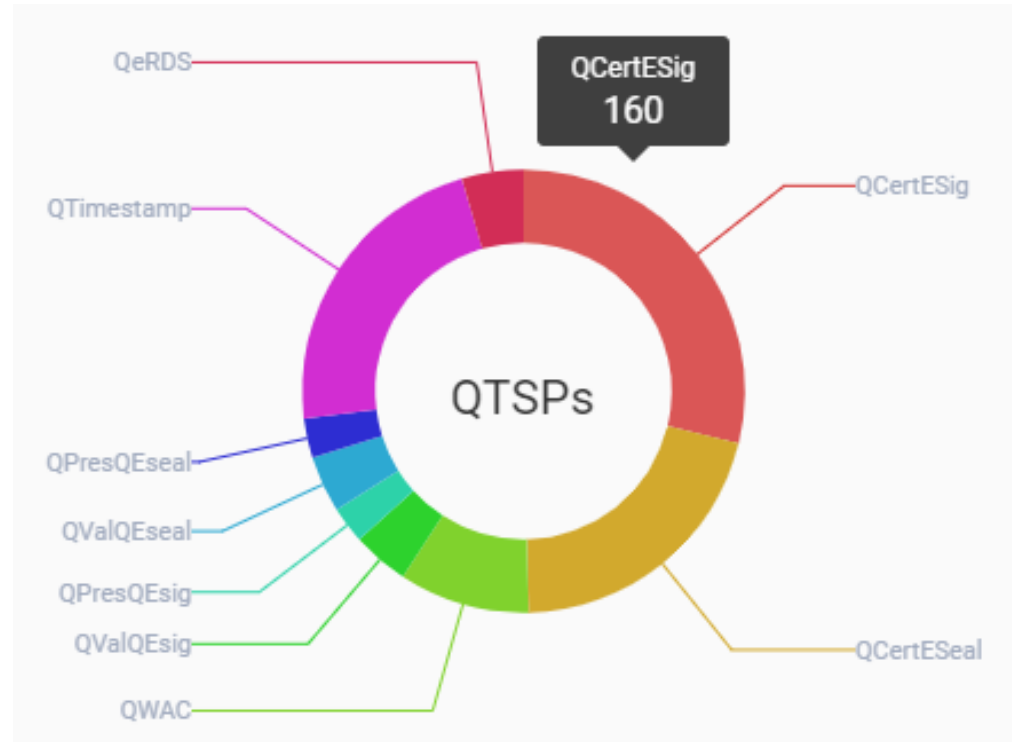
<https://esignature.ec.europa.eu/efda/tl-browser/#/screen/statistics>

Screenshots taken May 19, 2022

# Qualified Trust Service Providers (QTSP) in EU & EEA

210 QTSPs in 29 countries are offering qualified trust services as defined under eIDAS:

- Qualified **certificate** for
  - electronic signatures
  - electronic seals
  - web site authentication
- Qualified **validation** of
  - qualified electronic signatures
  - qualified electronic seals
- Qualified **preservation** of
  - qualified electronic signatures
  - qualified electronic seals'
- Qualified electronic **time stamps**
- Qualified electronic **registered delivery**



<https://esignature.ec.europa.eu/efda/tl-browser/#/screen/statistics>

Screenshot taken May 19, 2022

# Qualified Trust Service Providers (Selection)

Namirial Group includes QTSPs Namirial (IT), Evicertia (ES), Uanataca – as part of Bit4ID group (IT) + TSP Netheos (FR)

Key QTSP players in Europe and their countries with major activities

IT	FR	ES	BE/ LU	DE	AT	CH	NL	PT	PL	EE	RO	HR	CEE	QTSPs
<b>x</b>	x	x		x	x						x			Namirial Group
<b>x</b>	x	x		x							x			InfoCert* + Camerfirma + CertEurope
x														Aruba, Intesi, Intesa, Telekom Italia
	x		<b>x</b>											Universign
	x		<b>x</b>											Luxtrust
	x	<b>x</b>												Ivnosys
	x													Certigna, Cryptolog, Docaposte, Docusign, Tessi, YouSign
		x												FirmaProfesional, Vintegris
		x						x						Logalty*
			x											GlobalSign
			x				x							Digicert QuoVadis
				x	x	<b>x</b>								Swisscom Trust Services
				x	<b>x</b>									PrimeSign
				x										Bank-Verlag, D-Trust, Dt. Post, Dt. Telekom
					x									A-Trust
							x							Digidentity
								x						Multicert
											x			Certisign, Trans Sped
									<b>x</b>				x	Asseco
										x				SK ID Solutions
												x		AKD
													x	Evrotrust (BG), Microsec (HU), Adacom (GR), Byte (GR)

**x** in bold = Location of group headquarter

Last update of this list: June 11, 2022

Industry still quite atomized

Most QTSPs focus on their national market - some only on its public sector

Expansion

- beyond national borders: only a few
- to Latin America: some QTSP from IT & ES - marked with\*

# Geo Spotlight: Major national QTSPs in Spain



QTSPs - Listing based on estimated revenues in FY 2020

Company	founded	profile
<a href="#">Logalty</a>	2005	First Spanish LegalTech focused on contracting workflow automation which later expanded to certified communication & digital identification
<a href="#">Signaturit</a>	2013	Signing workflow orchestration platform and QEC for QES - primarily selling in Southern Europe, backed by Providence Strategic Growth (PSC) since 2020, acquired in 2021 <a href="#">lvnosys</a> and <a href="#">Universign</a> (BE)
<a href="#">lvnosys</a>	2011	Document management with extensive e-signature features and contract lifecycle management (e. g. notifications) and advanced authentication (biometric), owned by Signaturit-owner PSG since 2021
<a href="#">Camerfirma</a>	2000	Joint venture between Spain's Chamber of Commerce and InfoCert providing a wide range of online trust services incl. e-Signatures
<a href="#">FirmaProfesional</a>	2001	Former certification authority offering digital certificates to other TSPs with a recent shift towards e Signature, starting to place competition to its own clients and focus on professional offices
<a href="#">Vintegris</a>	2004	All in one digital identity solutions incl. digital certificate management, e-signature and authentication historically with high focus on public sector while is entering new markets recently, owned by Euronovate



# Digital Trust Services Landscape Vendor “DNAs”

Competitors (in brackets: product name) based on parent company focus:

Trust Services	- see slide -
Signature Workflow	Anasoft, Autenti, DigiSign, DocuSign, Edatalia, FPSign, iSign/CIC, Kapsch, OneSpan Sign (former: Vasco / Silanis eSignlive), PandaDoc, POS.AG, Setcce, Scrive, Signaturit*, Signius, Sproof, Skribble, Techsign DOC, Validated ID, Vizibit, Xitrust, Yousign, YotiSign, ZorroSign
Forms Creation (PDF)	Adobe (Adobe Sign), Foxit eSignGenie*, Nitro Connective*
PKI Specialists	Ascertia (SigningHub), Cryptomathic, Procilon proTECTr, Intarsys, SIGNiX
Remote Identification / Digital ID	Authada, Electronic Identification, Fourthline, IDNow (incl. Identity Trust Management & AriadNext), Itsme, Nect, SignD, Validated ID, Verimi, WebID
Content Clouds	Dropbox HelloSign, Box Sign (former: SignRequest)*
ECM / DMS / BPM	Dvelop sign, Kofax SignDoc, Nintex AssureSign*
Productivity Suites	airSlate (former: SignNow), PandaDoc, Zoho
Onboarding Hub	eID Easy, Signicat
Contract Lifecycle Management	Apptus Conga, Ironclad (former: PactSafe) Quicksign, Yozon
Banking Workflow Specialist	Credit Unions: IMM
Insurance Workflow Specialist	Policy Origination: iS2 AG (InSign), Nepatec
Hardware manufacturers	Elcom, Euronovate, Ingenico, Signotec (Signosign), Stepover (eSignatureOffice), Topaz (SigPlus), Viewsonic, Wacom (SignPro PDF)
Virtualization Software	Citrix (RightSignature)
E-Notary	Docverify, LiveNotary**, Notarize
E-Delivery Services	RPost (RMail E-Sign), Docaposte AR 24,

Competitors using some Namirial services – e. g. QEC for QES

\* Acquisitions in 2021 by Box: SignRequest, Foxit: eSignGenie, Nitro: Connective, Nintex: AssureSign, Signaturit: Ivnosys + Universign

\*\* since 2021 owned by PandaDoc

Last update: June 11, 2022





# Landscape Remote ID Proofing & Digital Identity

Public Sector Solution

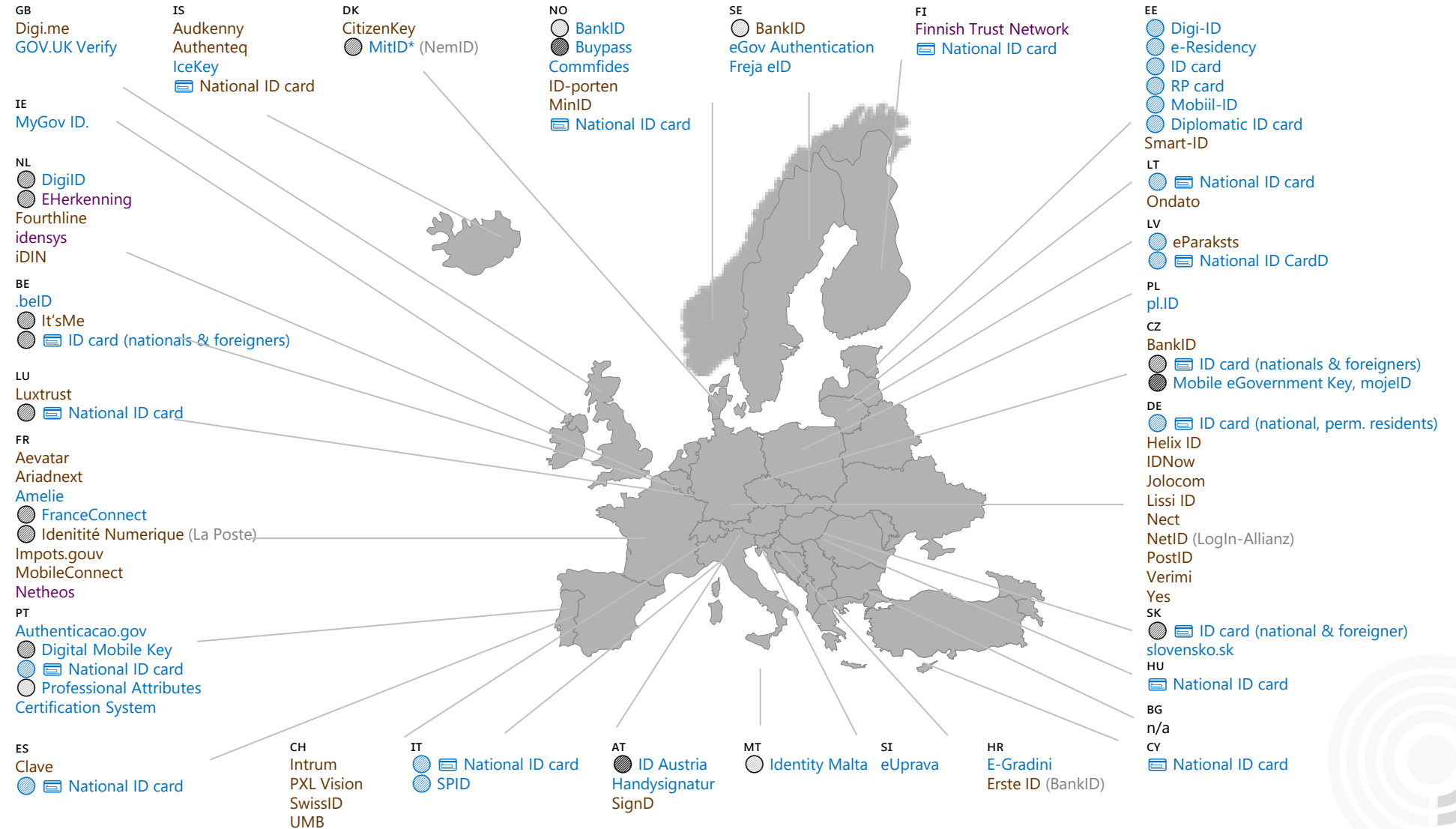
Private Sector Solution

Private Public Partnership

eIDAS - eID scheme\*\*

- Pre-notified
- Peer Reviewed
- Notified

Card-based  
electronic / digital identities



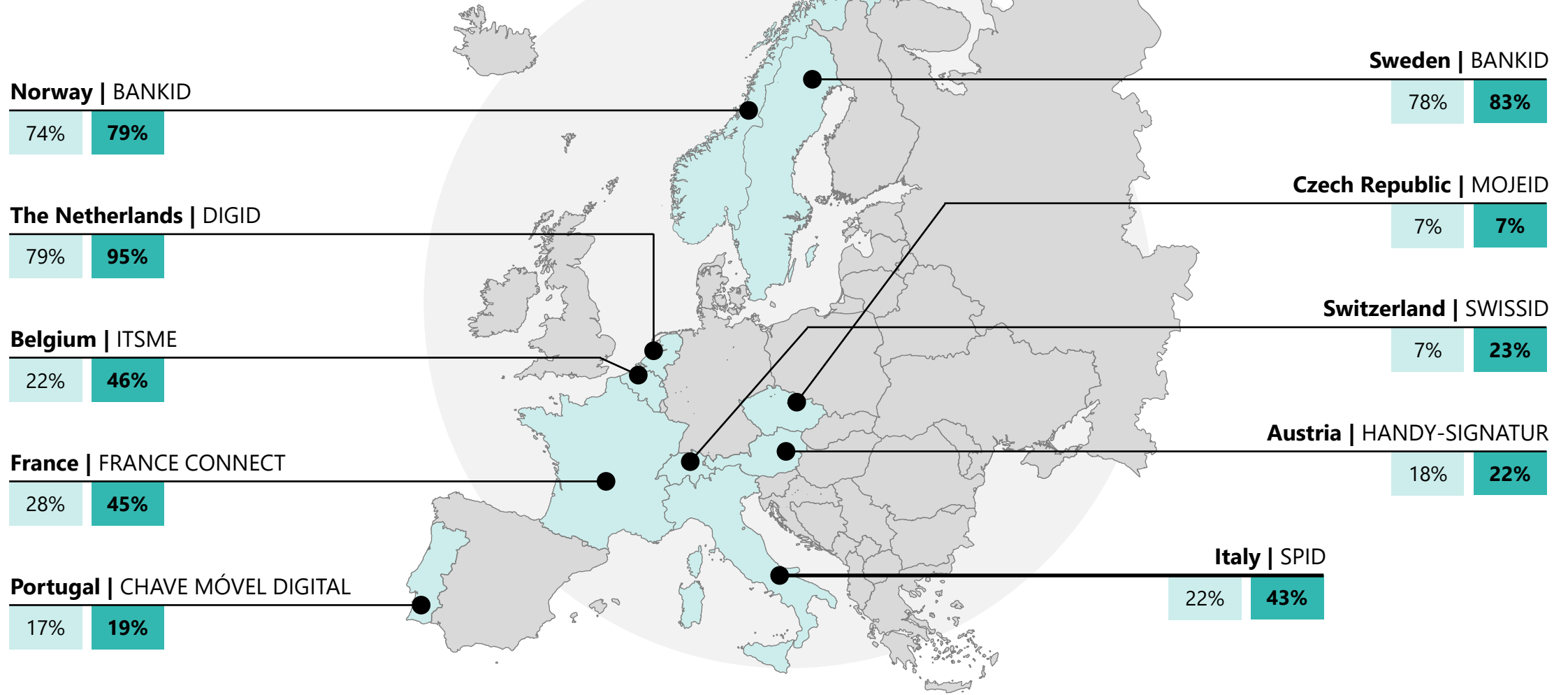
Last update: June 3, 2022 © Joerg Lenz Namirial ; Information provided without guarantee for accuracy and completeness of data displayed; For clarity reasons organizations are only listed in their home / main country

\* Source: Namirial Research and European Commission - eID User Community: Overview of (pre-)notified eID schemes ( i. e. those that can be used across national borders thanks to their integration with the eIDAS network ) <http://bit.ly/eIDSchemes-eIDAS>



# Digital Identity Adoption

% of Population owning a Digital Identity



Source of data in image: Digital Innovation Observatories of the School of Management of Polytechnic University Milano –Working Group Digital Identity –Results presented in Workshop November 19, 2021

2020

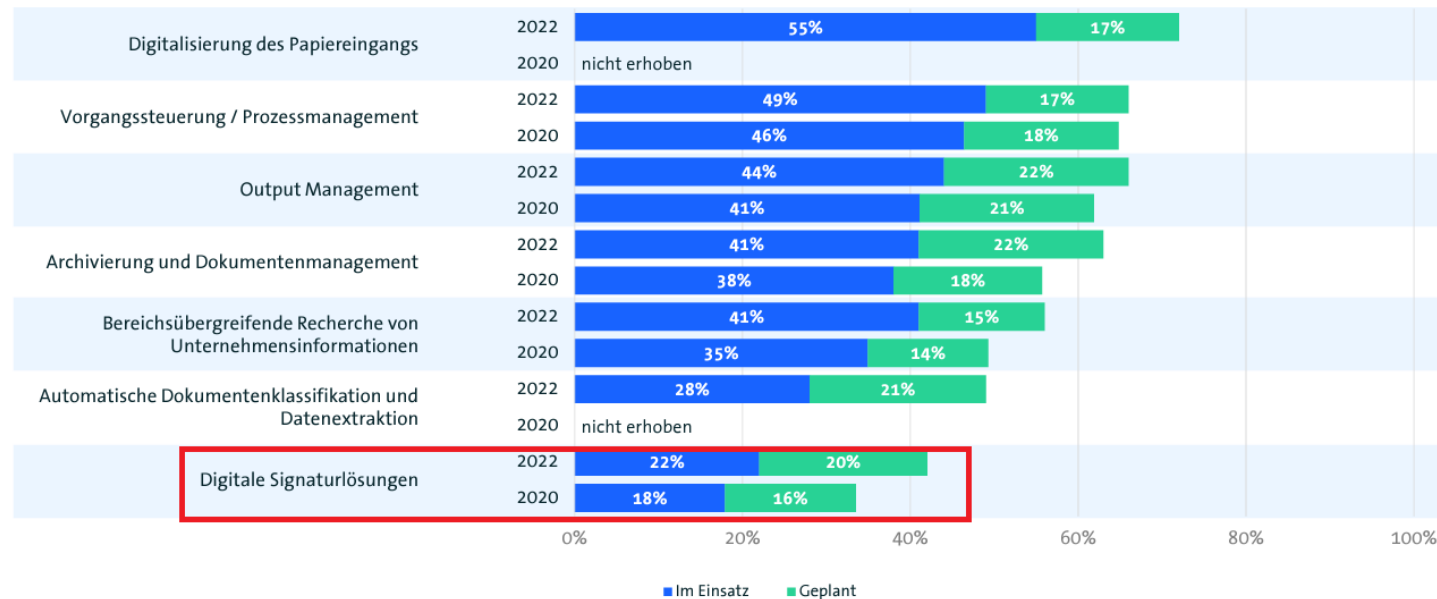
2021



# E-Signature Adoption 2022

Many organizations have "some" e-signature in place, but adoption might be not enterprise-wide

Für welche der folgenden Bereiche setzt Ihr Unternehmen bereits digitale Lösungen zur Verwaltung geschäftsrelevanter Dokumente und Inhalte ein bzw. plant dies?



Adoption of Digital Signature in German companies in 2022:  
Solution in place: 20%  
planned: 22%

Source: [Bitkom Digital Office Monitor 2022](#)

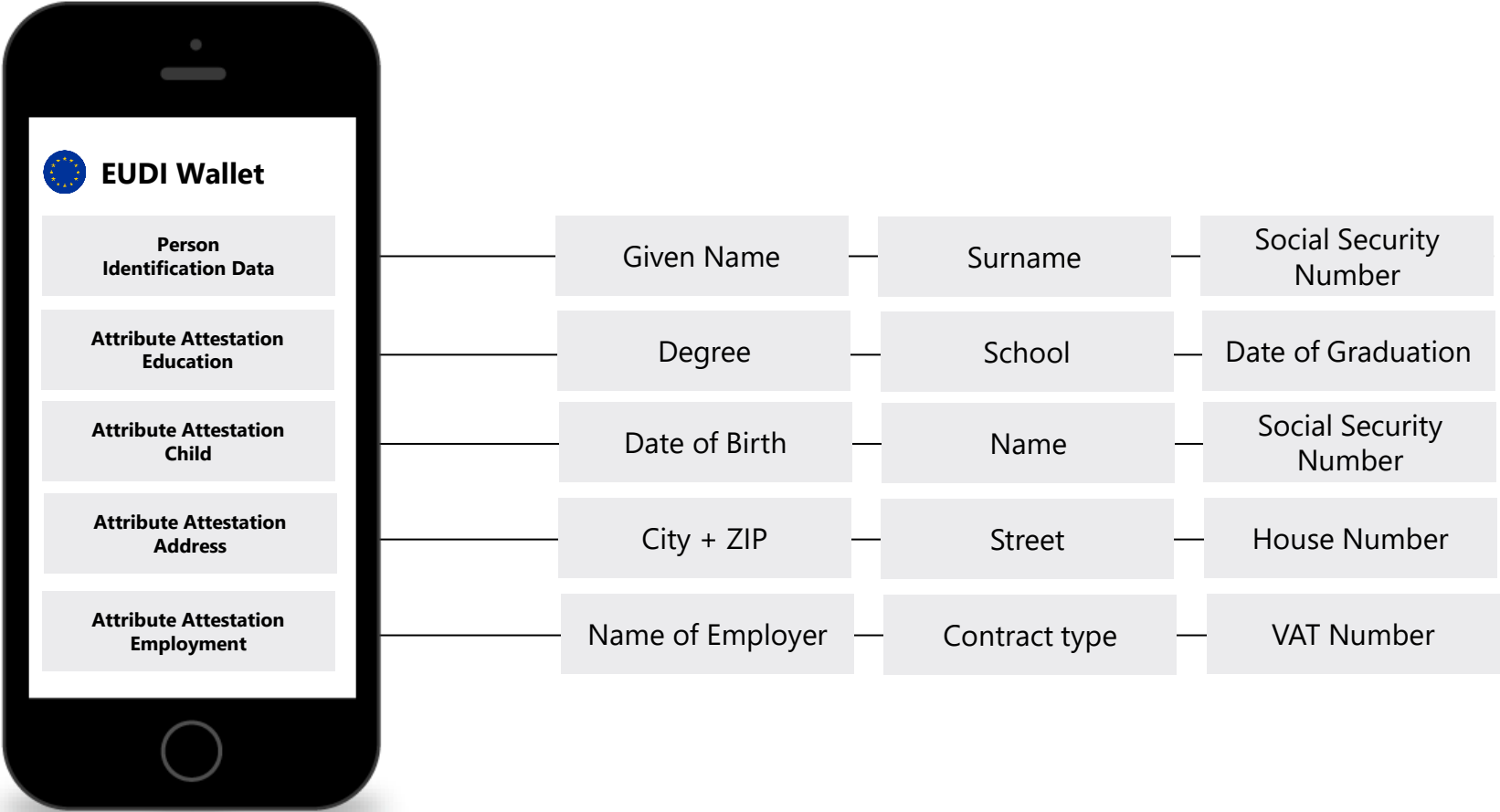
29 Basis: Unternehmen/Organisationen ab 20 Mitarbeitenden (2022: n=1.102 Gesamt; n=101 ÖV) | Quelle: Bitkom Research 2022

bitkom

E-Signature adoption may be limited to a few use cases in one or a few departments  
Many of them not happy for various reason and willing to pursue alternatives



# eIDAS Revision: European Digital Identity Wallet - Attributes



# Compiled by




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