



**Cicetana**

# **AI surveillance analytics**

**Annual General Meeting of Shareholders**

**November 2021  
CEO – Matt Macfarlane  
ASX:ICE**

# Regulatory and legal

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Authorised for release by the Board of icetana Limited

# WAVES OF CHANGE ALIGNING



Camera surveillance  
booming



AI hardware and software  
technology advancing



Outsourced  
guarding services



 **icetana**

unique & differentiated  
motion-intelligence  
product delivered by an  
experienced motivated  
team



# MOTION INTELLIGENCE

- ➡ **icetana** uses AI to improve surveillance operations
- ➡ **System self learns** 'normal' movement
- ➡ Reports **abnormal movement in real-time** – we call this “**motion intelligence**”
- ➡ Complements existing video management systems to remove noise and **increase efficiency** for operators

 **milestone  
Genetec™**

Or other video  
management  
systems

 **icetana**



 **icetana**

## ICETANA TODAY

**41**

Customer  
sites

**2.5  
million**

Hours of footage  
reviewed every week

2m in June 2020

**17**

FTE staff  
13 in Perth

**88%**

ARR growth  
2020-2021

Up from 32% growth  
prior year

**20+**

Active distributors  
and resellers  
globally

**14,200**

Cameras  
under license

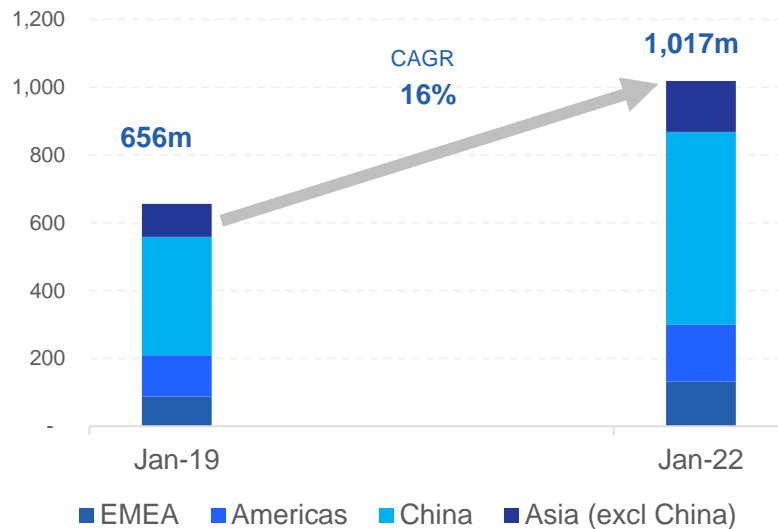
12,000 in June 2020

**5**

continents

# 1 BILLION SURVEILLANCE CAMERAS

Global installed base (millions)\*



Monitoring cameras @30 per person would require more than **33 million people**.

AI is the only way real-time events can be effectively tracked on the vast number of cameras used by today's organisations.



Motion intelligence is a natural first step into real-time monitoring.

\*Source: Data compiled by IHS Markit. .  
<https://www.theverge.com/2019/12/9/21002515/surveillance-cameras-globally-us-china-amount-citizens>

# SECURITY NEEDS ARE DRIVING GROWTH

\$430bn

+15% GROWTH



## Physical Security <sup>(1)</sup>

Guards, response systems, alarms, and subsets below

\$58bn

+10% GROWTH



## Surveillance <sup>(2)</sup>

Cameras, control rooms and video management systems

\$874m

+27% GROWTH



 **Icetana**

## Standalone surveillance analytics

AI, machine learning, facial recognition, rules-based systems and forensic search

\*Source:

(1) Data compiled by Grand View Research. <https://www.grandviewresearch.com/industry-analysis/public-safety-security-market>

(2) Data compiled by Markets and Markets <https://www.marketsandmarkets.com/Market-Reports/video-surveillance-market-645.html>

(3) Data compiled by OMDIA: <https://omdia.tech.informa.com/OM019230/Video-Surveillance--Analytics-Database-Report--2021-Data>

# SURVEILLANCE MARKET SECTORS



## VERY LARGE

- › 100-20,000 cameras
- › Central monitoring control rooms. Large guarding companies
- › Smart city surveillance, public transport, campuses, shopping malls, prisons, large corporates, casinos



## LARGE

- › 10-100 cameras
- › Recorded footage, alarm monitoring. local guarding businesses
- › Industrial sites, distributed retail sites, office buildings, schools



## SMALL

- › 1-10 cameras
- › Residential users, cloud storage, mobile alerts. Police response only
- › On-camera analytics

 **Icetana** Current focus

Next stage of growth via guarding aggregation

Future licensing opportunity



# CUSTOMER PAYBACK IS SWIFT



Trespass, Crowds,  
Loitering



Violence, Emergency  
response, Vandalism



OH&S,  
Fire/smoke



Camera  
tampering,  
Unauthorised  
access

## For Guarding Services customers



Security operators move  
from 30 cameras to 250  
cameras with icetana

icetana finds unpredictable  
events – competitors look  
for specific events.

A single risk event detected in  
real-time can support an entire  
year of icetana licensing.

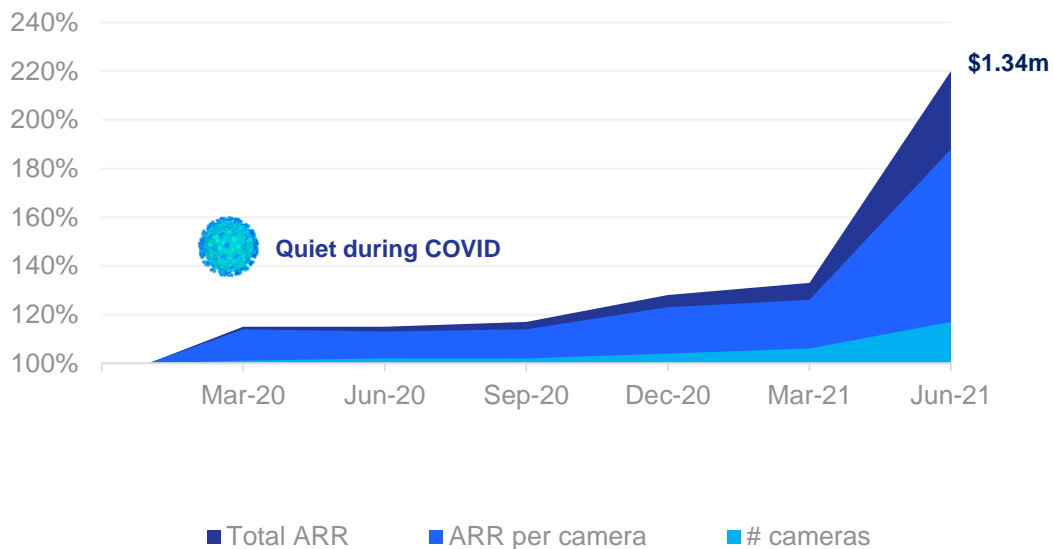
Our clients have told us:  
100 icetana cameras = 1 less guard providing  
a **\$35,000 p/a net saving** for every 100 cameras connected

# NEW CAMERAS BRING HIGHER ARR

Increase in both camera count and average ARR

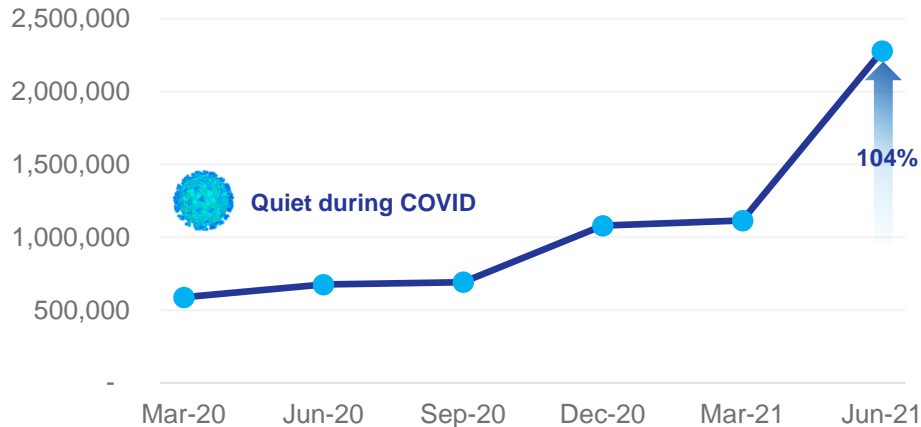
- ➡ Strong rebound as markets re-open from COVID
- ➡ Leads are re-engaging and our installation pace has picked up
- ➡ Recurring revenue growth anticipated through calendar 2022
- ➡ New cameras are bringing higher average which compounds to drive total ARR

Camera and ARR acceleration



# PIPELINE GROWING

## Pipeline additions A\$



Pipeline is accelerating post-COVID

**\$2.3m**

of new deals added to the pipeline in June quarter

*The Company cautions that it is not party to any binding agreements with respect to proposals in the pipeline. There can be no certainty that any binding agreements will be reached. The Company will make further announcements in the event that binding agreements are executed in accordance with its continuous disclosure obligations.*

# ENHANCING OUR CORE OFFERING

## Product development grows our addressable market

New features, easier deployment, simple installation, built for guarding companies



Huge product uplift from NVIDIA Deepstream platform



Patent filed for improved playback highlights



New file based POC take-up is very strong



Browser based configuration and camera deployment

## Guarding services customers/partners



Guarding client



Guarding client

**Panasonic**  
Technical partner



# EXECUTIVE TEAM



**Matt Macfarlane**

*Chief Executive Officer*

- ➡ Founding icetana CEO. Entrepreneur and investor.
- ➡ 9 years venture capital management experience.
- ➡ Successful technology and software development commercialisation leader.



**Kevin Brown**

*Chief Operating Officer*

- ➡ Led the tech team that drove VGW (gaming) from \$300/day to \$1.4m/day.
- ➡ Leading role in creating two of WA's three software unicorns (Nearmaps and VGW)
- ➡ Proven track record in software delivery, driving companies to scale and achieving dramatic revenue growth.



**Rafael Kimberley-Bowen**

*Chief Financial Officer*

- ➡ Experienced tech CFO with 15+ years leading finance functions
- ➡ Previously CFO at APE Mobile (acquired by Damstra) and M&A at Elmo Software (ASX: ELO)
- ➡ Qualified accountant with MBA and fellow of CIMA, 40under40.

# CUSTOMER EVENTS



## Car park fire

Bahrain shopping mall  
Faster response saved  
\$10s of 000's



## Unsafe work practice

Staff were provided  
training  
Future risk reduced



## Unauthorised access

Over \$2m saved in graffiti removal costs



## Protest tracked

Campus safety strengthened by real-time crowd tracking



## Workplace threats

Staff counselled and escalation averted

# GUARDING SERVICES ENGAGEMENT

## Zennikkei

Japan's 3<sup>rd</sup> largest guarding company



"After an extensive period of testing icetana in the Japanese market, we found it extremely useful in complementing our guarding services offering.

In particular, icetana's auto-learning function unleashes clients from complex decision-making requirements for security rules setting.

This removes the "defining-evaluating-adaptation" process required for alternative rules-based AI products and allows the security function to focus on the complex risks that exist in the real-world environment.

icetana's ability to detect a broad range of unusual activities in real-time means that Zennikkei is able to provide a highly responsive combined CCTV monitoring and guarding offering to our corporate customers."

Zennikkei Co. Ltd, Tatsuro Yamazaki, R & D Senior Manager





**icetana.com**  
**ASX:ICE**

**Matt Macfarlane**  
**matt@icetana.com.au**  
**+61 400 60 59 60**