

The Asia Pacific ePassport & eVisa Industry Report 2011 Detailed Market Analysis and Forecast

Comprehensive Market Data. Critical Insight. Targeted Revenue Forecasts

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February 2011*

by

ACUITY
MARKET INTELLIGENCE

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Report Overview

- Scope:** This report presents unique insight into the opportunity for the development of secure electronic and biometrically enabled passport and visa documents in the Asia Pacific Region. The current state of the market is evaluated in terms of how this market will likely evolve and where the most lucrative opportunities will be. This comprehensive report offers unbiased critical perspective and previously unpublished data and statistics on the ePassport and eVisa marketplace.
- OBJECTIVE:** Provide the basis for short-term, mid-range, and long-term strategic planning for technology and solution development, market investment, and phased adoption of ePassport and eVisa solutions.
- AUDIENCE:** Individuals responsible for strategic planning, business and market development, and sales related to ePassport and eVisa initiatives including vendors, integrators, investors, consultants, solution providers, and public sector staff responsible for developing and implementing ePassport and eVisa policies and programs.
- METHODOLOGY:** Analysis is drawn from significant market and technical developments, tests, pilots and deployments, public domain and private data sources, research and reports, surveys, and interviews with vendors, integrators, intermediaries, customers, privacy and civil liberties advocates, and other relevant technology and leading industry experts. Forecasts are derived from modeling market opportunities based on public domain and proprietary primary data and secondary data sources and are flexibly structured to account for known and predictive factors. Primary data determines known model data. These include data points like population, annual passports issued, program costs, and the number and type of visas issued. Models are adjusted to account for market conditions, current deployments, anticipated projects, and existing and planned infrastructure. Conservative assumptions for predictive factors such as technology pricing and anticipated adoption rates are introduced to determine forecasts.
- KEY CONCLUSION:** The ongoing development and production of secure ePassport and eVisa infrastructures will provide sustainable market opportunities as countries stabilize existing programs, continually incorporate new document and IT security features, update and replace aging equipment, and re-issue documents and reengineer processes in five to ten year cycles. By 2014, the deployment of a secure global border-crossing infrastructure that leverages the proliferation of ePassports and eVisas will begin in earnest. With an emphasis on automated self-service verification of documents and identity and global data exchange, there will be increasing efforts to integrate global systems that process ePassports and eVisas so that any given automated solution can process any ePassport holder with or without an accompanying eVisa. In this way the imminent global travel and border control transformation will both be driven by and drive ePassport and eVisa market evolution.
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Preface

February 2011

Acuity Market Intelligence originally published much of the content in this report as part of *The Global ePassport and eVisa Industry Report* (GePPEV) in June 2010. The GePPEV was developed in response to explicit market demand for reliable ePassport and eVisa industry data and was subsequently received as breakthrough research providing critical, previously unavailable market data, and analysis. Prior to the publication of the GePPEV, this type of data had existed only in bits and pieces, if at all, and was prohibitively expensive and time consuming to aggregate.

The GePPEV was Acuity's initial response to this market demand, the first in a series of reports designed to provide the kind of hard data, "hype free" insight, meaningful analysis, and believable forecasts that provide critical support to the healthy evolution of the electronic identity marketplace. *The Asia Pacific ePassport and eVisa Industry Report* is the first follow-up to the GePPEV providing regionally based forecasts and analysis. We hope the presentation of this content in this targeted format continues to meet the needs of the identification solution community.

As we stated when we published the GePPEV last year, and continue to believe, ePassports and eVisas are *poised to fundamentally change world travel* by delivering on the promise to create a secure, consistent, and far more reliable global identification infrastructure. The markets for ePassports and eVisas (those that incorporate biometrics) are large, complex, and difficult to quantify. These markets include enrollment, credentialing, and verification processes as well as solutions integration and the associated physical and logical technology and infrastructure required to deploy and leverage biometric passports and visas. Requirements and processes differ from



country to country, employ various levels of automation, and may or may not be integrated with local and regionally based border control and facilitation systems.

Acuity expects Asia Pacific market penetration to grow rapidly with 26 countries currently or planning to issue ePassports by 2014. Most significantly, China and India have begun issuing ePassports driving Asia with its vast population and sustained economic growth to surpass Europe in number of ePassports issued by 2014.

The visa situation is not as clear. Japan, South Korea, and recently Indonesia and Malaysia have adopted border-screening programs but have yet to incorporate biometric visas into their processes. At least 12 Asia Pacific countries are projected to issue eVisas by 2015 including Australia, which announced a limited eVisa program in 2010 that it has already begun to implement.

Regardless of specific adoption status on a country-by-country basis, ePassports and eVisas are becoming commonplace and these markets will provide sustainable revenue. While the cost and complexity of deployments will remain a significant obstacle for small and developing nations, investment and expertise provided by larger, wealthier states that have a vested interest in securing the global travel infrastructure will address this market gap. For those countries that have fully deployed programs, sustained revenues associated with lifecycle upgrades, updates, and security enhancements will be substantial.

Cheers,

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Introduction

The Asia Pacific ePassport and eVisa Industry Report is a data driven analysis of the state of the market for these two critical biometric based travel credentials in the Asia Pacific Region. The report relies extensively on primary sourced data (which for the purposes of this report is defined as quantitative data obtained from sources directly tabulating or producing this data), and on secondary sourced data from trusted sources. The report then leverages model-derived forecasts to present a comprehensive view of these markets. Data acquired, modeled, and forecast includes the number of credentials issued, the distribution of biometrics enrollment and verification units and ePassport document readers, the value and projected growth of the markets, as well as key solution components and technology forecasts.

Definitions

For the purposes of this report, the following definitions apply:

EPassport: A combined paper and electronic travel document used to authenticate the identity of travelers that incorporates a contactless IC “smart” chip and biometrics, supports a combination of electronic and optical security features including watermarks, optically variable devices, and holograms, and securely stores the personally identifiable information printed on the document and enrolled biometric data.

EVisa: The electronic authorization and credentialing process for granting temporary access to a country for a specified purpose for a specified period that relies on biometrics to establish and confirm identity.

Methodology

A combination of primary sourced data and model based projected data was used to develop the forecasts and analysis included in this report. Primary data acquired directly through government agencies and well-credentialed non-governmental agencies



was presumed valid. Data acquired through sources with less qualified credentials or with strong motivation for particular outcomes was validated through additional sources and/or model based alternatives.

Data and Data Acquisition

Primary data used to complete the analysis and develop forecasts for this report includes passport and visa volumes, population levels and growth, number and location of border crossing points, diplomatic missions and consulates, domestic passport enrollment centers, existing technology pilots and deployments, as well as budgetary allocations and reported costs for relevant programs, and units and value of deployed technology.

Primary data was obtained directly from government agencies such as Departments of Immigration, Interior, State, Homeland Security, Foreign Ministries, and Audit and Accountability Offices. Additional data was sourced from non-governmental agencies tasked with providing domestic and global insight into population, immigration, passenger travel, border management, and government expenditures. Source materials include online data and databases, published statistics, policy papers, budgets, and program analyses, public statements, press releases, and direct consultation.

Finally, data was obtained through publicly available information from, statements by, and direct consultation with civil servants, consultants, vendors, integrators, analysts, and other third parties directly involved or with direct knowledge of specific relevant programs and deployments. In some cases, these third parties provided confirmation of the accuracy of data obtained from sources deemed to require validation.

Model Development

Models were developed to project specific data for countries where primary data was unavailable from government or non-government sources. The modeled projections use known data such as population, geographic size, and visitor arrivals as a basis for determining unknown values by referencing global statistics and those from similar



countries or regions where primary data is available. These projections are adjusted to account for regional indicators and variations such as political and social stability, levels of development, financial performance and stability, as well as other country or region specific indicators or influencers. Models are also adjusted to account for existing market conditions, current deployments, anticipated projects, and existing and planned infrastructure. Conservative assumptions for predictive factors such as technology pricing and anticipated adoption rates are introduced to determine forecasts.

Once primary sourced or projected data was available for all relevant countries, forecast models were designed to project unit volumes of passports, visas, and the related technologies covered in this report - biometrics, document readers, credentials, and smart chips for all countries adopting ePassports and eVisa. Revenue forecasts were then developed based on these complete primary sourced and projected data sets.

Country Profiles

Each of the 30 Asia Pacific countries that currently has or will have a biometric-based ePassport program in place by the end of 2014, that are issuing eVisas, or that use inspection equipment to verify ePassports, is profiled in a one page overview. These overviews provide details about ePassport and eVisa programs (if deployed or planned to be deployed by 2014) including the year the program was initiated, types of biometric(s) used, annual volumes and revenue, numbers in circulation, validity, next procurement, and number of domestic and off-shore issuing locations, as well as data on deployed ePassport readers.

Market Analysis

Analysis is drawn from significant market and technical developments, tests, pilots and deployments, public domain and private data sources, research and reports, surveys, and interviews with vendors, integrators, intermediaries, customers, privacy and civil liberties advocates, and other relevant technology and leading industry experts. Critical data and key implications drawn from the primary data and forecasts are filtered



through this knowledge base and presented from both a policy and planning perspective as well as from an opportunity assessment and market value perspective.

Forecasts

The final section of the report presents adoption and revenue forecast data globally, regionally, by solutions components and technologies. The forecasts have been developed through a rigorous process relying on the best available and or projected data. As with all market forecasts, the most significant indicator is the scale of the projections not the precise numbers. Furthermore, where assumptions were required to calculate forecasts, the underlying principal was to rely on conservative rather than aggressive estimates. In this way, ***the report offers a conservative market forecast baseline indicating the scale of opportunity expected over the next five years.***

Because of the complex nature of the ePassport and eVisa markets and the associated complexity involved in modeling data and forecasting revenues, *it is critical that the methodology, assumptions, and model notes in the forecast section be reviewed to gain relevant insight from the data.* Additional information is provided in the report in specific sections to reinforce the underlying assumptions where deemed necessary.







Table of Contents

About Acuity Market Intelligence	ii
Report Overview	iv
Preface.....	vi
Introduction	x
Definitions.....	x
Methodology	x
Data and Data Acquisition	xi
Model Development	xi
Country Profiles	xii
Market Analysis	xii
Forecasts	xiii
Table of Contents.....	xvi
Table of Figures.....	xix
Executive Summary	1
1. The ePassport and eVisa Marketplace	2
Global Market for ePassports & eVisas Reaches \$10.4 Billion in 2014	2
Dominance of The Asia Pacific Region	4
Wide Divergence in Infrastructure Requirements.....	7
Enrollment	8
Data Management	8
Credentialing.....	9
Verification.....	9
Integration.....	11
Asia Pacific Live Biometric Enrollment Lags Behind Global Adoption	11
Uptake of Passport Readers Dependent on eGate Adoption.....	12
Chipsets and Biometrics Shift Industry Dynamics.....	12
Tipping Point for Asia Pacific Adoption within Reach	12
Key Findings and Implications.....	14
Market Analysis	16
2. State of the Market	17
2.1 Global Overview	17
2.2 Asia Pacific ePassport Market	20
2.3 Asia Pacific eVisa Market.....	22
2.4 Asia Pacific ePassport and eVisa Market Dynamics.....	25
2.4.1 Market Drivers	25
2.4.2 Market Dominance	26
2.4.3 Market Leadership.....	26
2.4.4 Vendor Selection.....	27
2.4.6 The Future	28
2.5 Asia Pacific Marketplace Evolution	28
2.6 Global Key Vendors	30



3. Solutions Overview	37
3.1 Critical Components	37
3.1.1 Enrollment.....	39
3.1.2 Data Management.....	40
3.1.3 Credentialing	42
3.1.4 Verification	43
3.2 Technology.....	45
3.2.1 Biometrics	46
3.2.2 Document Readers.....	47
3.2.3 Secure Credentials and Smart Chipsets.....	48
3.3 Human Factors Considerations	49
4. Passport and Visa Data by County	53
4.1 EPassport Country Overview	54
4.2 EVisa Country Overview.....	55
Country Profiles.....	57
Armenia	58
Australia.....	59
Azerbaijan	60
Bangladesh	61
Brunei.....	62
Cambodia.....	63
China	64
Fiji	65
Hong Kong	66
India.....	67
Indonesia.....	68
Japan.....	69
Kazakhstan.....	70
Korea, South	71
Kyrgyzstan	72
Macau.....	73
Malaysia.....	74
Maldives.....	75
Nepal	76
New Zealand	77
Pakistan	78
Philippines.....	79
Singapore.....	80
Taiwan.....	81
Tajikistan	82
Thailand.....	83
Turkmenistan	84
Uzbekistan	85
Vietnam	86



Market Forecasts	87
5. Forecast Methodology and Assumptions.....	88
5.1 Methodology.....	88
5.2 Assumptions and Notes	90
6. EPassport and eVisa Adoption	93
6.1.1 Global ePassport Unit Adoption	93
6.1.2 Global eVisa Unit Adoption.....	95
6.2 Asia Pacific ePassport Adoption	97
6.2.1 Asia Pacific ePassport Units.....	97
6.2.2 Asia ePassport Units.....	98
6.2.3 Pacific ePassport Units.....	100
6.3 Asia Pacific eVisa Adoption.....	102
6.3.1 Asia Pacific EVisa Units	102
6.3.2 Asia eVisa Units	103
6.3.3 Pacific eVisa Units	104
7. Global Combined ePassport and eVisa Revenue	106
7.1.1 Global Combined ePassport and eVisa Revenue.....	106
7.1.2 Global Combined ePassport and eVisa Solution Component Revenue	107
7.1.3 Global Combined ePassport and eVisa Technology Revenue	108
7.2 Asia Pacific ePassport and eVisa Revenue	108
7.2.1 Asia ePassport Market Revenue.....	108
7.2.2 Asia ePassport Solution Component Revenue	111
7.2.3 Asia ePassport Technology Revenue.....	117
7.2.4 Asia eVisa Revenue	121
7.2.5 Asia eVisa Solution Component Revenue.....	122
7.2.6 Asia eVisa Technology Revenue	124
7.2.7 Pacific ePassport Revenue	125
7.2.8 Pacific ePassport Solution Component Revenue.....	127
7.2.9 Pacific ePassport Technology Revenue.....	128
7.2.10 Pacific eVisa Revenues.....	129
7.2.11 Pacific eVisa Solution Component Revenue.....	130
7.2.12 Pacific eVisa Technology Revenue	131
Report Findings	132
8. Key Findings and Implications	133
The Market for ePassports and eVisas is Expanding Rapidly	133
EPassport Usage Reaches Critical Tipping Point by 2014 while eVisa Usage Lags Behind	133
Highest Growth Rate Expected for Enrollment and Verification Components	134
Market Evolves Towards Increased Automation of Border Control Processing	135
The Future	135
Final Thoughts.....	136



Table of Figures

Figure 1-1: Global ePassport and eVisa Marketplace Revenue Chart	3
Figure 1-2: Global ePassport Unit Adoption Table	3
Figure 1-3: Global eVisa Issuance Unit Adoption Table	4
Figure 1-4: Asia Pacific ePassport and eVisa Market Growth Chart.....	5
Figure 1-5: Asia Pacific ePassport and eVisa Combined Revenue Table.....	5
Figure 1-6: Asia Pacific ePassport and eVisa Combined Revenue Percent of Global Table.....	5
Figure 1-7: Asia Pacific ePassport Unit Adoption Table	6
Figure 1-8: Asia ePassport Unit Adoption Table.....	6
Figure 1-9: Pacific ePassport Unit Adoption Table	6
Figure 1-10: Asia Pacific eVisa Unit Adoption Table	7
Figure 1-11: Asia eVisa Unit Adoption Table	7
Figure 1-12: Pacific eVisa Unit Adoption Table	7
Figure 1-13: Global ePassport Biometrics Live Capture at Enrollment Adoption Unit Table.....	11
Figure 1-14: Asia Pacific ePassport Biometrics Live Capture at Enrollment Adoption Unit Table.....	11
Figure 1-15: Global ePassport eGate Adoption Unit Table	13
Figure 1-16: Asia Pacific ePassport eGate Adoption Unit Table	13
Figure 2-1: Global ePassport and eVisa Marketplace Revenue Chart	18
Figure 2-2: Asia Pacific ePassport Revenue Table.....	20
Figure 2-3: Asia Pacific ePassport Market Growth Chart.....	21
Figure 2-4: Asia Pacific Global ePassport Revenue Market Share Table	21
Figure 2-5: Asia ePassport Adoption Unit Table.....	22
Figure 2-6: Pacific ePassport Adoption Unit Table	22
Figure 2-7: Asia ePassport eVisa Revenue Table	23
Figure 2-8: Asia Pacific Global eVisa Revenue Market Share Table.....	23
Figure 2-9: Asia Pacific eVisa Market Growth Chart	23
Figure 2-10: Asia eVisa Adoption Unit Table	24
Figure 2-11: Pacific eVisa Adoption Unit Table	24
Figure 2-12: Vendor Category Segmentation Chart	31
Figure 2-13: Vendor Overview Chart	35
Figure 3-1: Solution Components Definitions Table	37
Figure 3-2: Asia Pacific ePassport and eVisa Combined Revenue without eGates Table.....	38
Figure 3-3: Asia Pacific ePassport and eVisa Solution Component Revenue Table.....	38
Figure 3-4: Asia Pacific eGate Revenue Table	38
Figure 3-5: Asia Pacific Solution Component Chart Table	39
Figure 3-6: Global ePassport Biometric Live Capture at Enrollment Adoption Unit Table.....	40
Figure 3-7: Asia Pacific ePassport Biometric Live Capture at Enrollment Adoption Unit Table.....	40
Figure 3-8: Global ePassport Biometric Live Capture at Enrollment Adoption Unit Table.....	44
Figure 3-9: Technology Definitions Table	45
Figure 3-10: Asia Pacific ePassport and eVisa Technology Revenue Table.....	45
Figure 3-11: : Asia Pacific ePassport and eVisa Technology Revenue Chart.....	46
Figure 3-12: ePassport Reader Market Segments.....	47
Figure 3-13: Asia Pacific ePassport Reader Units Table.....	47
Figure 3-14: Global ePassport Document Readers Units Adoption Table	48
Figure 4-1: ePassport Issuing Countries Overview Table	54
Figure 4-2: eVisa Issuance Overview Table	56
Figure 6-1: Global ePassport Unit Adoption Table	93
Figure 6-2: Global ePassport Issuance and Circulation Table.....	94
Figure 6-3: Global ePassport Issuance Adoption Chart.....	94
Figure 6-4: Global ePassport Circulation Adoption Chart	95
Figure 6-5: Global eVisa Issued Unit Adoption Table	95
Figure 6-6: Global eVisa Application Adoption Table.....	96



Figure 6-7: Global eVisa Application Adoption Chart	96
Figure 6-8: Asia Pacific ePassport Unit Adoption Table	97
Figure 6-9: Global ePassport Biometric Live Capture Units Adoption Table	97
Figure 6-10: Global ePassport Document Readers Units Adoption Table	98
Figure 6-11: Global eGates Units Adoption Table	98
Figure 6-12: Asia ePassport Market Unit Adoption Table	98
Figure 6-13: Asia ePassport Adoption Table	99
Figure 6-14: Asia ePassport Adoption Table	99
Figure 6-15: Asia ePassport Biometric Live Capture Adoption Table	100
Figure 6-16: Asia ePassport Readers Adoption Table	100
Figure 6-17: Pacific ePassport Market Unit Adoption Table	101
Figure 6-18: Pacific ePassport Adoption Table	101
Figure 6-19: Pacific ePassport Units Adoption Table	101
Figure 6-20: Pacific ePassport Biometric Units Adoption Table	101
Figure 6-21: Pacific ePassport Readers Adoption Table	101
Figure 6-22: Asia Pacific eVisa Unit Adoption Table	102
Figure 6-23: Asia Pacific eVisa Biometric Live Capture Units Adoption Table	102
Figure 6-24: Asia Pacific eVisa Verification Capture Units Adoption Table	103
Figure 6-25: Asia eVisa Unit Adoption Table	103
Figure 6-26: Asia eVisa Adoption Table	103
Figure 6-27: Asia eVisa Adoption Table	103
Figure 6-28: Asia eVisa Biometric Enrollment Live Capture Adoption Table	104
Figure 6-29: Asia eVisa Biometric Verification Live Capture Adoption Table	104
Figure 6-30: Pacific eVisa Unit Adoption Table	104
Figure 6-31: Pacific eVisa Adoption Table	105
Figure 6-32: Pacific eVisa Adoption Table	105
Figure 6-33: Pacific eVisa Biometric Enrollment Live Capture Adoption Table	105
Figure 6-34: Pacific eVisa Biometric Verification Live Capture Adoption Table Revenue Forecasts	105
Figure 7-1: Global ePassport and eVisa Combined Revenue Chart	106
Figure 7-2: Global ePassport and eVisa Combined Revenue Table	107
Figure 7-3: Global ePassport and eVisa Percent of Combined Revenue Table	107
Figure 7-4: Global ePassport and eVisa Combined Solutions Components Revenue Table	107
Figure 7-5: Global ePassport and eVisa Combined Solution Components CAGR Table	108
Figure 7-6: Global ePassport and eVisa Combined Technology Revenue Table	108
Figure 7-7: Asia ePassport Revenue Chart	109
Figure 7-8: Asia ePassport Revenue by Country Table	109
Figure 7-9: Asia ePassport Revenue Market Share by Country Chart 2009	110
Figure 7-10: Asia ePassport Revenue Market Share by Country Chart 2014	110
Figure 7-11: Asia ePassport Solution Component Revenue Table	111
Figure 7-12: Asia ePassport Solution Component Revenue by Country Table	117
Figure 7-13: Asia ePassport Technology Revenue Table	117
Figure 7-14: Asia ePassport Solution Component Revenue by Country Table	121
Figure 7-15: Asia eVisa Revenue Chart	121
Figure 7-16: Asia eVisa Revenue by Country Table	122
Figure 7-17: Asia eVisa Revenue Market Share by Country Chart 2014	122
Figure 7-18: Asia eVisa Solution Component Revenue Table	122
Figure 7-19: Asia eVisa Solution Component Revenue by Country Table	124
Figure 7-20: Asia eVisa Technology Revenue Table	124
Figure 7-21: Asia eVisa Biometric Technology Revenue by Country Table	125
Figure 7-22: Pacific ePassport Revenue Chart	125
Figure 7-23: Pacific ePassport Revenue by Country Table	126
Figure 7-24: Pacific ePassport Revenue Market Share Chart 2009	126
Figure 7-25: Pacific ePassport Revenue Market Share Chart 2014	126
Figure 7-26: Pacific ePassport Solution Component Revenue Table	127



Figure 7-27: Pacific ePassport Solution Component Revenue by Country Table 128

Figure 7-28: Pacific ePassport Technology Revenue Table 128

Figure 7-29: Pacific ePassport Technology Revenue by Country Table 129

Figure 7-30: Pacific eVisa Revenue Chart 129

Figure 7-31: Pacific eVisa Revenue by Country Table 129

Figure 7-32: Pacific eVisa Revenue Share by Country Chart 2014..... 130

Figure 7-33: Pacific eVisa Solution Component Revenue Table..... 130

Figure 7-34: Pacific eVisa Solution Component Revenue by Country Table..... 131

Figure 7-35: Pacific eVisa Technology Revenue Table..... 131

Figure 7-36: Pacific eVisa Technology Revenue by Country Table..... 131

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