

The Global ePassport & eVisa Industry Report **Opportunity Analysis and Market Forecasts 2010 to 2015**

Critical Market Data. Comprehensive Insight. Targeted Revenue Forecasts

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ACUITY
MARKET INTELLIGENCE

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About Acuity Market Intelligence

Acuity Market Intelligence is a leading ID Solutions independent strategic consultancy. Acuity cuts through the clutter of information overload to provide technology-neutral and vendor-independent industry analysis for the ID Solutions industry and other emerging technology markets. Acuity's established reputation for candid, "hype free" insight is based on a proven record of accurately anticipating market trends. Acuity relies on *rigorous intuition*—a combination of quantifiable, data driven analysis and insight honed over two decades—to consistently provide original, thought provoking, accurate, and reliable analysis.

The core of Acuity's knowledge is a fundamental understanding of technology market development, technology evolution in emerging markets, and how technology is adopted and deployed most effectively in targeted vertical markets. This knowledge is applied through proven tools and techniques to help vendors, integrators, investors, and commercial and public sector customers:

- Identify, prioritize, and size lucrative market opportunities.
- Define and analyze targeted vertical solutions.
- Create and evaluate market development and adoption strategies.
- Achieve sustainable market dominance.
- Evaluate deployment plans within the context of generating quantifiable ROI.
- Develop sustainable policies and regulations.

Market Development Expertise

Acuity's singular focus is on the development of emerging technology providing expertise in the following areas:

Market Analysis – Identification and evaluation of key technological developments, market trends, industry players, and deployment effectiveness.

Opportunity Analysis – Highly granulated vertical market segmentation and identification, prioritization, and sizing of the most lucrative opportunities for a given product, service, or solution.

Solutions Analysis – Requirements and functional specifications for applications of emerging technology.

Due Diligence – Evaluation of market players to ensure:

- Opportunities have been adequately and accurately assessed.
- Financial, operational, and strategic plans are in place to create sustained market viability.
- Product and service quality can be demonstrated.

Strategic Planning – Creation of highly leveragable plans to develop, evaluate and deploy emerging technology-based solutions with the objective of achieving the highest levels of customer satisfaction and sustained market dominance.

Client Services

Clients leverage Acuity's knowledge and expertise through a range of off-the-shelf, semi-custom, and fully custom product and service offerings. These include:

Executive Briefings/Strategy Sessions – Interactive sessions provide targeted insight to Executives.

Consulting – Custom projects designed to support specific Client objectives.

Segment Tracking – On-going coverage of technologies, players, market drivers and dynamics of a particular industry sector or technology marketplace.

Reports – Periodic and one-off targeted analyses focused on a range of topics including: technology evolution, application development, vertical market adoption, and competitive analysis.

Research – Standard and semi-custom research projects designed to address specific knowledge gaps.

Workshops – One to two day intensives presenting Acuity's proprietary methodology for applying proven tools and techniques to identify, prioritize, and size market opportunities.

Please contact **Acuity Market Intelligence** for additional information on services, availability and fee structures.

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Overview

SCOPE:	This report presents unique insight into the worldwide opportunity for the development of secure electronic passport and visa documents—the current state of the global market is evaluated in terms of how this market will likely evolve and where the most lucrative opportunities will be. This unprecedented, comprehensive report offers unbiased critical perspective and previously unpublished data and statistics on the ePassport and eVisa marketplace:
OBJECTIVE:	This report provides a 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, distributors, solution providers, as well as public sector staff responsible for developing and implementing ePassport and eVisa policies and programs.
METHODOLOGY:	Analysis is drawn from market coverage including: significant market and technical developments, tests, pilots and deployments, as well as 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 sources and are flexibly structured to account for known and predictive factors. Primary sources determine known model data. These include data points like population, annual passports issued, and the number and type of visas issued. Models are 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.
KEY CONCLUSION:	The ePassport and eVisas marketplace is highly fragmented and consists of a complex network of policy makers, local and global technology and solution providers, and government agencies supported by a range of consultants and System Integrators with diverse interests, priorities, and objectives. Deployed solutions in this arena are progressing in “fits and starts” with evidence of continued performance and usability improvements advancing at uneven rates depending on the region, the level of customer sophistication and commitment, and the budgetary allocation. Unlike other markets where the development of a global infrastructure inherently requires dependency on large multinational enterprise expertise, many countries are choosing to rely on local suppliers to develop and deliver ePassport and eVisa solutions. There is, a strong trend towards the development of standards and the emergence of best practices across the solution spectrum from enrolment and credentialing, to issuance and verification, to technology upgrades and replacement cycles that will likely smooth out the rough spots in market evolution and create a more stable environment with more predictable and consistent opportunities over the next few years.
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Content

This groundbreaking market research provides unique insight and analysis on the critical questions facing the ePassport and eVisa marketplace:

- o How are the markets for ePassports and eVisas evolving?
- o How big is overall market for ePassports and eVisas by unit and revenue?
- o How big are the markets in specific regions and countries by unit and revenue?
- o What are the technology and solution components required for deployment?
- o What are the revenue forecasts for these technology and solution components?
- o Where are the most lucrative market opportunities and how can they be leveraged?
- o Who are key players and market leaders and where and how do they operate?
- o What data is critical to understanding and evaluating the marketplace?
- o What business models – fixed price, transaction or service-based - are used today and how will these evolve?

This report offers 250+ pages of previously unpublished critical data and statistics on the ePassport and eVisa marketplace including:

- A detailed Opportunity Analysis that evaluates the market in terms of both Key Solution Components: enrolment, data management, credentialing, verification, and solutions integration, and Critical Technologies: biometrics, document readers, secure credentials, and smart chips.
- Service Level & Operational Benchmarks that allow end-users, vendors, and integrators to evaluate solution requirements, performance, and costs for existing and planned deployments.
- One-page overviews for each of ~100+ countries with detailed passport and visa market data and statistics including: document volumes, application and enrolment statistics, issuance and production locations and statistics, program status – technologies, vendors, last and expected procurement dates, and performance against Service and Operational Benchmarks.
- Forecasts by Unit and Revenue for ePassports and eVisa globally, by region, and by country, and for Key Solution Components and Critical Technologies globally, by region, and by country.



Context

February 2010

The market for ePassports and eVisas remains in an unpredictable state of barely controlled frenzy. Now that much of Western Europe has staked its claims in regards to ePassports and eVisas, emphasis is shifting to Eastern Europe, the Middle East and Africa. Asia offers tremendous market potential but it is likely, given the strong performance of local players, that much of the technology and solutions deployed may be regionally “home grown”. Although, contrary to this trend, The Chinese government announced in October and November 2009 that they selected NXP and Infineon chips respectively for use in their ePassport project.

Almost all of Europe has or will have ePassports by 2010, about ten African countries have or will have them shortly, the US is issuing ePassports, and Canada will by 2011. In addition, Japan, Korea, Singapore, Australia and New Zealand are also issuing ePassports. Altogether, at least 90 countries worldwide will be offering ePassports by the end of 2010.

The visa situation is not as clear. The UK, Sweden, Norway, France, Germany, Belgium, Luxembourg, Lithuania all have biometric eVisa programs.. Saudi Arabia is currently identifying an outsourcing partner for producing eVisas and many other nations are in various stages of defining, evaluating or beginning to deploy biometric eVisas.

Regardless of the current status on a nation-by-nation basis, ePassports and eVisas are becoming commonplace and if anything, the cost and complexity of deployment is the largest obstacle for continued adoption. Even for those countries that have already deployed, the lifespan of these systems and solutions is generally five to ten years. As more readers and automated border control solutions are deployed, technology and process interoperability becomes a reality, and aggressive system updates, upgrades, and replacements will become mainstream and provide more predictable, stable market dynamics that promise significant on-going opportunity.

The vendor ecosystem is extremely large and complex and market wide value chains are not clearly defined. Almost without exception, every vendor in the marketplace claims they have the “leading solution” for passports, visas, and/or border control, that their approach/ methodology is the best, and that their key areas of focus are the most critical. Competition for every procurement is intense and in this environment, claims of “market leadership”, particularly in terms of technology performance, are not verifiable or let alone useful in most cases. Demonstrated capability, high degrees of customer satisfaction, and a willingness to provide a platform for continuous innovation are critical in defining the market in favorable terms that suit a particular vendor or solution approach.

Over the past few years, Acuity has had consistent, ongoing requests for insight into the dynamics and specific opportunities in this marketplace. The most sought after research and analysis been in reference to developing a comprehensive view of the upcoming opportunities - which entities in which countries will procure biometric passport, visa or border control systems in what timeframe, the technology, process requirements, and business models to support these opportunities, and the actual data supporting the marketplace— document volumes and associated revenues, and the most likely winners in this highly competitive marketplace. To date, this type of data has existed only in bits and pieces, as has been prohibitively expensive and time consuming to aggregate.

The Global ePassport and eVisa Industry Report is Acuity’s initial response to this market demand. This report is the first in a series that will provide the kind of hard data, “hype free” insight, meaningful analysis, and believable forecasts that provide critical support to the healthy evolution of the identification solution industry.

Cheers,

C. Maxine Most

Rudie Lion



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Note: this outline representative sample content and may not reflect final report content

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Note: All figures and country lists are representative sample content and may not reflect final report content.

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PRE-PUBLICATION SPECIAL

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The Global ePassport and eVisa Industry Report (single user)	\$7500.00 USD	\$6000.00 USD
The Global ePassport and eVisa Industry Report (2-10 users)	\$10,000.00 USD	\$8000.00 USD
The Global ePassport and eVisa Industry Report (unlimited)	\$12,500.00 USD	\$10,000.00 USD

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