

The Asia Pacific ePassport & eVisa Industry Report

Market Analysis and Forecasts 2009 to 2014

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 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 This comprehensive report offers unbiased critical perspective and previously unpublished data and statistics on the ePassport and eVisa marketplace.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 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 Global ePassport and eVisa Industry Report was Acuity's initial response to this market demand. The report was the first in a series 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 identification solution industry.

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 approximately 100 countries worldwide to be offering ePassports by the end of 2011 with at least another 5 set to adopt by the end of 2014. Almost all of Europe has implemented ePassports programs, about 16 African countries have or will have them shortly, the United States is issuing ePassports, and Canada is planning to do so in 2011. In addition, penetration in the Asia Pacific is growing with 30 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. The UK, Sweden, Norway, France, Germany, Belgium, Luxembourg, Lithuania have biometric eVisa programs with additional European countries coming on board in the next few years to meet EU eVisa requirements. 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. US-VISIT, while not purely an eVisa program, incorporates biometric visas as part of its overall approach to biometric-based border control and has become an international model for border screening. Japan, South Korea, and most recently Indonesia and Malaysia have adopted similar 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 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. In addition, as more document and biometric readers and automated



border control solutions are deployed, technology and process interoperability will become a reality and aggressive border system updates, upgrades, and replacements will become mainstream and provide more predictable, stable market dynamics that promise significant on-going opportunities. Finally, a number of smaller or less developed nations that do not issue their own credentials will adopt document and biometric readers and associated automatized systems to facilitate secure border crossings by foreign visitors.

Since the publication of the GePPeV, we have additional requests for more targeted data within the ePassport and eVisa marketplace. *The Asia Pacific ePassport and eVisa Industry Report* provides this level of targeted detail, including unit projections, and revenue forecasts for ePassports and eVisas as well as previously unpublished Solution Components and Technology forecasts for individual countries in the region. We hope the presentation of this content in this targeted format continues to meet the needs of the identification solution community.

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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.



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The Asia Pacific Global ePassport and eVisa Industry Report provides unique insight into the regional opportunity for the development of secure electronic passport and visa documents—the current state of the Asia Pacific 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: **Preview the report at www.acuity-mi.com/APGePPeV_Report.html.**

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