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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Online	www.acuity-mi.com
Phone	+1 303 449 1897
Email	info@acuity-mi.com

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 This comprehensive report offers unbiased critical perspective and previously unpublished data and statistics on the ePassport and eVisa marketplace.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 am 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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AUTHORS: C. Maxine Most, Principal, Acuity Market Intelligence
Rudie Lion, Principal, Acuity Market Intelligence

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,

C. Maxine Most
max@acuity-mi.com

Rudie Lion
rudie@aucity-mi.com

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 form 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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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/APePPeV_Report.php**

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More Information Available at
www.acuity-mi.com
Questions? +1 303.449.1897 info@acuity-mi.com