



Global Mobility Under Siege





This report covers the state of **Global Mobility** in 2020 and highlights the biggest shifts in **passport power** during the pandemic.

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Of all the books in the world,
the best stories are found between
the pages of a passport.

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Introduction

The Passport Index was initially created to offer a deeper look into the world of global mobility — passport triumphs and downfalls, global ranking trends, unforeseen surprises, and everything in between. But in the past year, what it truly offered, was a deeper look into humanity.

Evidently, COVID-19 caused major disruptions to mobility, hindering international travel, revoking existing visas to citizens and visitors, and rendering passport powers to all-time lows.

From rapidly changing real-time data to reflect COVID-19 lockdown measures, to the World Openness Score plummeting 65% in a matter of months, Passport Index translated the depths of the pandemic into the future of global mobility and showed in numbers, how, what affects one person anywhere, can affect everyone everywhere.

And today, as countries progressively begin to reopen their borders and ease temporary visa bans, the 2021 Passport Index Global Mobility Report reveals what rock-bottom for global mobility looks like during a worldwide pandemic. It also explores whether government decisions for lockdown measures were a positive mark for successful containment of the COVID-19 disease, or a cause for bigger concern in closing our world to responsible mobility.

Unlocking the future of travel

Since the inception of the World Openness Score (WOS) in 2015, year after year, Passport Index has monitored the ease of travel between countries, as the world steadily opened at an average pace of 6%.

As avid optimists, our calculations suggested that if this trend continued, the world would be completely open for visa-free travel by 2035. That is, of course until 2020 happened.

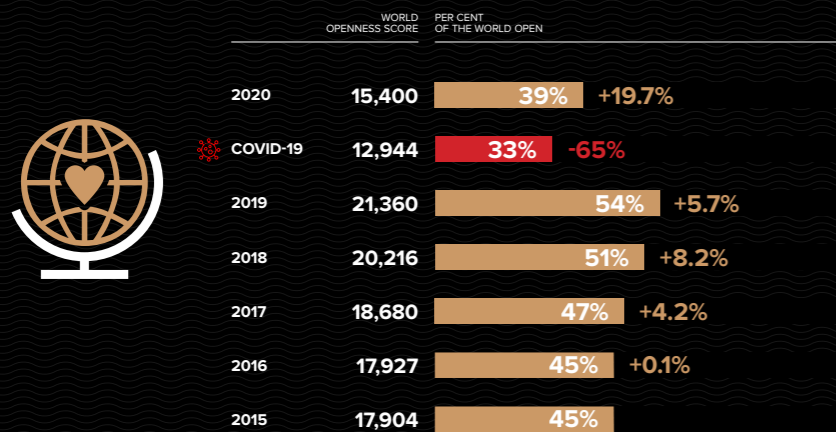
Between December 31st 2019 and May 31st 2020 when COVID-19 was officially declared a global pandemic; WOS went from an all-time high of 21,360, to its all-time low, of 12,994 — dropping 65%.

What this meant was that as many — if not most — countries closed their borders, 67% of the world itself was closed for travel.

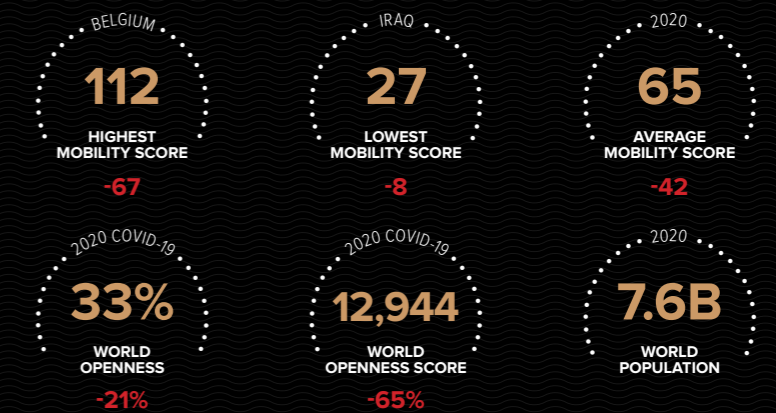
As we begin a new year, however, current real-time data shows more promise. At a 15,597 WOS, up by 19.7% since its ultimate low point, we expect to see a continued increase in openness as global travel progressively resumes, as well as an increase in controlled protocols prioritizing the health of global travelers.

We have already begun to see a surge of initiatives to unlock the potential of digital identity for secure and seamless travel and a move towards digital passports. One thing is for certain, preparing for the worst has pushed global mobility to further innovate for a safer and more seamless travel experience as the world continues to open.

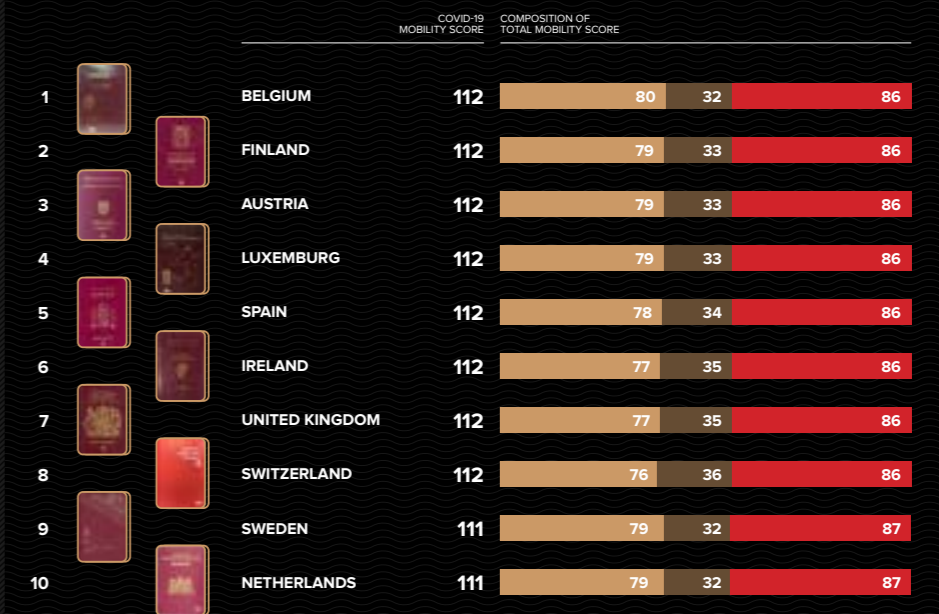
The World Openness Score during COVID-19 pandemic



The Global Mobility Barometer during COVID-19 pandemic



The Most Powerful Passports during COVID-19 pandemic



Winners and Losers: How COVID-19 impacted global mobility

Borders closed. Passports collected dust. Visa agreements evaporated. Global mobility fell off a cliff at the height of the pandemic, yet some countries withstood the pressure much better than others. What's driving these changes?

With the emergence of COVID-19 came an unprecedented onslaught of travel bans, border closures, temporary visa restrictions and quarantine measures. As a result, the World Openness Score, (WOS), which assesses how open the world is based on visa-free travel agreements, hit an all-time low since it was introduced by Arton Capital in 2015.

At the height of the pandemic, the WOS dropped from a record 21,360 (54%) in 2019 to 12,944 (33%) out of a total possible 39,601. To put it another way: world openness plunged 65% due to the novel coronavirus – a staggering statistic with countless economic, social and humanitarian implications.

“Before the pandemic, the WOS was increasing at a rate of 6% per year and our world was more open and mobile than ever,” says Armand Arton, President and Founder of Arton Capital. “This has been a shock for the whole planet – we are feeling the impact on the movement of people and ideas, innovation and trade.”

The pandemic also caused major shake-ups when it comes to individual passport power. The Passport Index, which ranks the passports of 199 countries and territories based on visa-free access and an overall mobility score (MS), has been tracking the changes in real-time.

In first place as the most powerful passport throughout COVID-19 was Belgium with an MS of 112 – up from No. 4 last year with a score of 170. In 2019, the UAE topped the ranking with an MS of 179. Yet during the pandemic, the country didn't even make the top 10, dropping to 13th place with a score of 90.

European Union countries – with the exception of the UK, which left the EU – dominate the top 10 rankings, and the likes of Finland, Luxembourg and Spain have retained their coveted positions. Even amid virus restrictions, these passports still enjoyed access to most of the EU's 27 member nations which buoyed their passport power throughout the crisis.

“EU countries still have relatively high mobility scores because they have retained visa-free access to so many countries in the region,” says Arton. “But for most other countries, mobility really depends on how efficiently the country has managed the crisis and its reciprocal visa agreements.”

The Biggest Losers during COVID-19 pandemic



When a country bans all or most foreign travelers – as did South Korea, Canada, Hong Kong, Macao, mainland China, Japan, Taiwan, Bhutan and others – it is likely their citizens will also see a reduction in visa-free travel in response. In addition, those countries that have exceptionally high daily rates of infection or deaths, or that have not managed the pandemic well in general, have been hit particularly hard by travel restrictions.

The biggest loser of 2020? South Korea. The country took a nosedive from third place with an MS of 171 last year to just 78 during COVID-19, driven in part to an early outbreak as well as the government's decision in April to suspend visa exemptions for at least 90 nationalities.

Meanwhile, historically strong passports have also tanked following travel bans and visa restrictions. Canada's MS, for instance, plunged from 169 to 78, and Japan's fell from 171 to 77. The US, which boasted a solid score of 171 in 2019, saw its MS shrivel to 80.

“When it comes to the US, we are not surprised that the country saw significantly less mobility in 2020,” adds Arton. “With the rest of the world largely disagreeing with how they've handled this medical crisis internally, US citizens represent a high risk for travel.”

While the UK has so far held steady in the top 10 most powerful passports with an MS of 112, it will likely sink to the level of the US soon for two reasons: First, it officially left the EU on January 1st 2021; and second, it's battling a new and highly infectious virus strain.

“Unfortunately, no matter where you are from, I think the next few years will be very hard on personal mobility. Yet, when the world finally overcomes this crisis, we will have an opportunity for a fresh start – a chance to travel more responsibly as global citizens and really appreciate our freedom of movement,” shares Arton.

10 predictions for the next 10 years

The COVID-19 pandemic has grounded travelers and crippled economies, but it hasn't stopped innovation. As the world maps out a road to recovery, here are 10 predictions for what travel might look like in the next decade.

1. AI soars into aviation

With the Fourth Industrial Revolution upon us, we do not doubt that AI pilots, customer service chatbots, VR entertainment, real-time baggage tracking, and highly personalized in-flight experiences will become the norm by 2030. These changes are already in motion.

Many airlines, including Cathay Pacific and Iberia, offer sophisticated chatbots, while Singapore Airlines provides KrisPay, a digital blockchain wallet. Though AI pilots are less common – the US Air Force's U2 Dragon Lady spy plane just made history in December, when an artificial intelligence co-pilot flew a military plane for the first time – the autonomous aircraft market should hit US\$23.7 billion by 2030.

We'd be surprised if AI pilots and co-pilots weren't in the cockpits of commercial jets in the next 10 years.

2. Immunity or bust

As vaccination programs kick off worldwide, our eligibility to travel may come down to a digital health or "immunity" passport to prove one has been vaccinated. In December, Aruba became the first country to adopt a digital health passport platform – and we expect many more to follow.

IATA is in the final stages of developing a digital vaccine passport for travelers, the IATA Travel Pass, which would let travelers share their COVID-19 testing or vaccine information with airlines and border authorities, via a contactless passport app. And CommonPass, backed by the World Economic Forum, provides a similar service. Domestically, China and Macao have already introduced digital health check systems, which assign a color (green, yellow or red) based on your presumed risk level.

While nations have yet to reach a global standard, it is only a matter of time before health records become a requisite for travel in the coming years. What's more, since the virus may mutate year after year – or more pandemics may emerge – such certificates could be here to stay for the foreseeable future.



3. Goodbye, physical passports

As biometric technology, such as facial recognition and fingerprints, becomes more integrated into immigration procedures worldwide, it is only a matter of time before we retire our physical passports. We've seen glimpses of the future in Australia and the UAE where contactless facial biometric gateways and "smart tunnels" enable pre-screened travelers to pass through immigration without pulling out their physical passports. But in the next 10 years, we expect to see the end of paper-based documentation.

What will we use instead? Enter digital "unique passenger identification" records, such as IATA's One ID, a document-free process based on identity management and biometric recognition. These passports of the future will most likely take the form of a digital identity that's cryptographically sealed on the blockchain, a secure decentralized ledger, and accessed via a unique digital 'fingerprint'. This means fast and more convenient immigration, plus no chance of theft or forgery.

4. One passport won't suffice

Citizenship and residence by investment programs have only grown more popular during the pandemic, as high-net-worth individuals seek greater flexibility, mobility and freedom. And in the future, one passport simply won't cut it.

A desire to hedge against future health, economic, political, environmental and social crises isn't going anywhere. With failing economies and fears of recessions, even the citizens of historically wealthy, stable countries like the US have seen citizens snapping up a backup Plan B or two.

During the pandemic, destinations like the Caribbean – where well-insulated islands seem like safe havens – and Europe have been popular. Looking ahead, we expect to see an uptick in interest in places like Montenegro, which is on the waiting list to join the EU, and Bulgaria, which is currently in the process of joining the Schengen area.

5. CIPs take off

The number of countries offering a second residency or citizenship by investment programs will boom in the next 10 years. Such programs tend to emerge after catastrophes since they are seen as an easy, efficient and safe way for countries to recover from financial crises, develop ambitious real estate projects and create new jobs. Additionally, many programs – particularly those in the EU – will most likely see changes in terms of due diligence and residential requirements. In the EU, for instance, we predict that future programs will emphasize greater transparency and connection with the community, be that through language skills, minimum time spent on the ground, or job creation.

6. The rise of e-Residencies and virtual immigrants

While only elite travelers will have the means to invest in CIP, we expect other global citizens of all income levels to take advantage of residency programs. With remote work now the norm thanks to COVID-19 shifts, e-Residencies – like Estonia’s pioneering program – will likely see higher demand from entrepreneurs, digital nomads, freelancers, and startups this decade. Such programs will be pivotal in attracting a new generation of remote workers who can work from anywhere.

What’s more, measures like digital work permits could be assigned remotely to allow “virtual immigrants” to start working remotely while awaiting visa clearance and entry permits. This would give all parties – government, employers, workers and their families – the flexibility to deal with unexpected disruptions and delays, while simultaneously supporting local economies.



7. Open sesame: World openness to double

Before the pandemic, the World Openness Score reached an all-time high of 54% (21,360). In 2020, we witnessed a drop to 39% (15,400) due to COVID-19 restrictions, but we predict a V-shaped rebound coming around the corner around 2023. And in the next 10 years, we expect the World Openness Score to nearly double to around 75% of the world.

Bilateral visa-free agreements around the world – a trend that already emerged pre-COVID – will fuel the renewed mobility. In the past five years, more countries signed visa-free agreements than ever in history. And as we eventually return to normality and diplomatic relations are restored, we expect this trend to pick up right where it left off.



8. Apply for eVisas on your phone

As visa-free agreements soar in the future, so too will eVisa and ETAs. We predict that countries will drop physical printed visas and visas on arrivals and opt for digital visas instead. This will create a faster, more convenient, more secure and overall, more accessible travel experience.

The need for health requirements in the coming months and years will likely accelerate this trend. Essentially, since health certificates will be stored in a mobile wallet or app, it’s likely that visas can be bundled together in one place. Digitizing visas also opens the door for more opportunities – think fully digital visa application services and approval processes on your mobile phone.



9. All eyes on Africa

Within the next decade, we foresee countries in Africa dramatically increasing their passport power and mobility as the 55 member-state African Union inches closer to its Agenda 2063 goals. Similar to the European Union, the African Union aims to envision ‘an integrated continent, politically united and based on the ideals of Pan-Africanism and the vision of Africa’s Renaissance’.

For those who hold the African Union passport – which has been in use since 2016 – this vision includes visa-free travel across the member states, the freedom to move and work without restrictions, and a wellspring of new personal and business opportunities. It is not a fully mobile continent, yet, but we expect to see much progress on this front by 2030.

10. Traveler experience redefined

During the downturn in 2020, many airlines reimagined what flights of the future could be like. To get travelers back in the air, they’ll need to improve the passenger experience, prioritizing automatic technology that reduces physical touchpoints at every step in the journey.

We will also see automatic ultraviolet cabin cleaning systems; flexible seating and sleeping configurations; beautiful open-air, green spaces in airports; unlimited Wi-Fi; greater booking flexibility; live TV and gaming inflight; and more personalized inflight meals. Mobile apps will be another key ingredient, offering the ability to shop inflight and track your bags, order meals, stream your favorite shows, access real-time translation services, and take advantage of wellness practices.

A few airlines are already dabbling in these spaces, from Etihad Airways’ new Jet Lag Adviser app to Qatar Airways’ UV cleaning system, and Southwest Airlines’s touchless inflight entertainment system.





Real-time data in a post pandemic world

The pandemic revealed a disconnect when it comes to reliable, timely visa intelligence. But the Passport Index fills the void as a centralized source of updated visa requirements.

During the pandemic, borders opened and closed by the hour. Visa restrictions fluctuated by the minute. And in the wake of ever-shifting policies, tens of thousands of travelers found themselves stranded all over the world, from the Maldives to India to Denmark.

Suddenly, up-to-date travel intelligence became more crucial than ever as countries deployed hyper-localized crisis management strategies. But without one centralized data source, many did not know where to turn for reliable, up-to-date information. The answers vary widely, depending on the source – quick Google scan, government websites, airlines, consulates or third-party operators – leaving passengers even more confused and frustrated.

This ongoing disarray and disruption have only underscored a serious need – and desire – for one single, definitive source of real-time visa and mobility intelligence.

That's why Passport Index and its innovative Passport Index Mobile App have become travel essentials for anyone taking to the skies again during or after the pandemic. Offering a unique and secure place to hold your passport data, the app calculates your Global Mobility Score, based on the passports you hold; recommends the best travel document for each destination; provides real-time visa requirement updates; tracks your trips; and much more.

“Real-time data is going to be key when it comes to getting the world back to normal,” says Armand Arton, the founder and president of Arton Capital. “Even in the past few weeks, many governments have stopped letting UK nationals in and the websites of many travel authorities still don't reflect that ... Timing is everything. And without real-time updates and accurate resources, travelers will not feel confident.”

WORLD'S PASSPORTS IN YOUR POCKET



The app is particularly powerful for those who own multiple passports, from business leaders to multinational families. Essentially, users can choose a preferred passport to travel with, based on their destination and the associated visa requirements. In this way, the Passport Index enables smarter, safer and more personalized travel – enhancing one's freedom of movement through data.

“Within a month of launching The Passport Index, the website crashed because we had over a million visitors,” recalls Arton. “Back then, it was originally built as an internal tool for our team and our clients, but the enthusiasm showed us how much people wanted this personalized, informative tool. Today, and in the years ahead, this is exactly what people want: a frictionless approach to travel.”

Having access to such services and data at your fingertips not only makes travel more convenient, but it also enhances personal safety, saves money, alleviates pain points and instills confidence.

“When the world begins to recover, we will see a greater focus on improving travel – how hotels, airlines, governments can offer a smoother, faster and more reliable experience after so much disruption and uncertainty,” says Arton. “Real-time data will not only be a key ingredient to streamlining this experience, but it will also be essential to a frictionless global recovery.”



Country to watch: Montenegro

With Montenegro on track to enter the EU in the coming years, we expect the country's passport power to see a significant boost.

When it comes to increasing passport power and mobility, Montenegro and the greater Balkan region have incredible potential. Looking at a map of the European Union, there is a gap between EU member states and Greece. Within this void, you have most former Yugoslavian countries – Bosnia and Herzegovina, Montenegro, Albania, North Macedonia and Serbia – which will likely all join the EU in the future.

Montenegro is leading the pack. The country of roughly 642,000 boasts one of the fastest-growing tourism economies globally, welcoming over 2 million travelers per year pre-COVID. Tourism accounts for over 20% of Montenegro's GDP, with a revenue of US\$1.224 billion in December 2018, which was a growth of 10.3% year-on-year. Much of this has been driven by investments into tourism infrastructure and by the end of 2019, investors had already poured US\$1.65 billion into 10 of the country's most important tourism projects.

Looking at the bigger picture, Montenegro is making moves to strengthen its economy post-Covid. The World Bank has approved a US\$3.7 million financing loan to strengthen rural development and agriculture projects in Montenegro that will enhance the country's EU candidacy. And, in June 2020, the International Monetary Fund provided an emergency loan of US\$83.7 million to help the country weather the effects of the decline in tourism due to the pandemic.

In addition, the country is transitioning towards a market economy that should see more favorable conditions for investments in private sector development. As a result of all of this, Montenegro's GDP is forecast to grow 6% in 2021, and 4.6% in 2022.

With arrivals expected to rebound after the pandemic, the country continues to invest in ambitious real estate and tourism projects that cater to an elite market. Many investors have their sights set on the northern region, where there is excellent potential for coastal holidays in the summer and skiing in the winter.



Among the most significant developments is the US\$338 million Blue Horizon project, a vast 200-room luxury resort village on the northern coast, close to Porto Montenegro, a luxurious marina village and superyacht port. There's also Sveti Marko Island, a six-star spa resort in the Bay of Kotor; Portonovi, which will include the One&Only Portonovi hotel, a beach club, and a superyacht marina; and Lustica Bay, an expansive luxury hotel, golf and marina complex on the Adriatic.

In Kolašin, an internationally renowned ski resort town in the mountains of northern Montenegro, there is also significant activity. Setting course to completion in 2022 is Bjelasica 1450 – a four-star ski resort exclusive to Montenegro's Citizenship by Investment Program via Arton Capital – as well as several five-star developments to decorate the pristine mountainous region; Hotel Breza, the Kolašin Westin Ski Resort, and Four Points by Sheraton.

In addition, Montenegro is expected to see better connectivity, thanks to the launch of new flights into the country from major European cities like Paris, Zurich, Berlin, Brussels, Rome, Milan, Barcelona, Oslo, and Stockholm. There are also a growing number of housing development projects in popular areas of Montenegro. These include Porto Montenegro in the Bay of Kotor; Dukley Gardens on the Zavala Peninsula; and DOM XXI near the Budva Old Town.

Given Montenegro's growth potential, the country has one of the most popular CIPs in Europe. Before the pandemic, Passport Index gave Montenegro a mobility score of 124 in 2019, a significant increase from 102 in 2015. Although that number plummeted to 71 during the pandemic, we expect it to recover quickly once travel resumes. And the passport will only become more powerful once Montenegro becomes an EU member state, as early as 2025, and enjoy visa-free access to over 160 countries around the world.

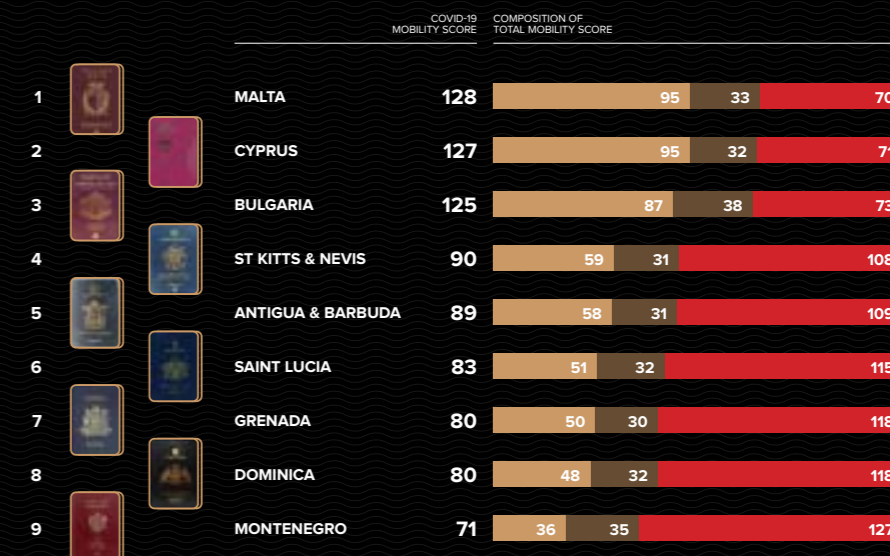
At that point, it will be only a matter of time before other Balkan countries follow suit. These countries have long developed strong trade and diplomatic links with Europe. What's more, the EU has already expressed a commitment to gradually integrate the Balkan states – Serbia, North Macedonia, and Albania are already EU membership candidates.

We are watching Montenegro, and the rest of the Balkans closely, as it offers excellent business opportunities, a beautiful outdoor holiday destination and soon, access to the EU's world of visa-free travel economies.

The Most Powerful Passports during COVID-19 pandemic



The Most Powerful CBI Passports during COVID-19 pandemic



A global “reset” for a new beginning

The world is more mobile than ever, and times like these are yet another testament to that. Movement of people, ideas, and services have defined the 21st century, driving innovations and uniting populations.

Despite increasing visa restrictions, the current pandemic does not define the end of globalization, but rather the start of responsible mobility.

The fact is our world will become increasingly open and this outbreak has proven that the time has come to address adequate and responsible ways to optimize our mobility. With every global problem, comes a global solution.

Traveling responsibly with the notion that our world is becoming a global village will ensure that every citizen adopts a sense of responsibility for the rest of the world. And most importantly, it is imperative to remember that in the face of adversity, humanity continuously becomes more resilient.

Given the clear volatility of passports, holding one powerful passport no longer poses an advantage. It is critical to secure two or more passports for an improved combined global access, ensure proper shelter and healthcare, and additional protection from more than one state.

If this experience has taught us one thing, it is to be prepared. And passports play a crucial role in ensuring that alternatives are within reach in case of another global crisis.

About

Empowered by Arton Capital, the Passport Index is the world’s most popular global mobility intelligence platform providing interactive travel requirements and the ability to compare, rank and improve passports based on their mobility scores.

Methodology

The Passport Index methodology is based on the following:

- Passports of 193 United Nations member countries and 6 territories (ROC Taiwan, Macao (SAR China), Hong Kong (SAR China), Kosovo, Palestinian Territory and the Vatican) for a total of 199 are considered.
- Territories annexed to other countries such as Norfolk Island (Australia), French Polynesia (France), British Virgin Islands (Britain), etc. who do not issue their own passports are excluded and not considered as destinations.
- Countries which issue passports, regardless if they enforce independent visa policies or not are considered as destinations.
- Data is based on official information provided by governments, updated in real-time with intelligence obtained through crowdsourcing and enhanced with proprietary research from highly credible sources.
- To determine the individual rank of each passport, a three-tier method is applied:
 1. Mobility Score (MS) – includes visa-free (VF), visa on arrival (VOA), eTA and eVisa (if issued within 3 days)
 2. VF portion of their score vs VOA
 3. United Nations Development Programme Human Development Index 2018 (UNDP HDI) is used as a tie breaker. The UNDP HDI is a significant measure on the country’s perception abroad.

