



China Third-party Payment Industry Report, 2012

Oct. 2012

This report

- ◆ **Analyzes market environment of third-party industry, and market segments, including online payment, mobile phone payment, and telephone payment**
- ◆ **Highlights the market competition**
- ◆ **Focuses on 28 third-payment enterprises, including profile, operation and SWOT analysis**
- ◆ **Offers market forecast**

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Abstract

After nearly a decade of “barbaric growth”, the Central Bank has successively issued “birth permits” for third-party payment enterprises since May 2011. As of August 12, 2012, it has issued five batches of Payment Business License for non-financial institutions, and a total of 197 third-party payment companies have been licensed, thus basically establishing the payment industry pattern in China.

Stimulated by payment licensing, also relying on the general trend of traditional enterprise networking and the expansion of third-party payment companies in numerous industrial market segments, the internet payment market still maintains a high-speed development trend. In 2011, the third-party payment market realized transaction size of more than RMB2 trillion, a year-on-year increase of 95.2%.

By Q1 2012, there had been 1.089 billion registered accounts in China’s third-party internet payment market, of which, Alipay and Tenpay occupied the first two places with overwhelming superiority, respectively 61.8% and 18.9%.

Currently, third-party payment enterprises in China show two kinds of development models on the whole.

In consideration of large-scale users, Alipay and TenPay attach great importance to the needs of individual users in business development and product innovation; whereas, 99Bill, ChinaPnR, YeePay, iPS and other third-party payment platforms treat corporate users as the focus of business development, providing integrated solutions to enterprises so as to meet their requirements.

Among the 197 enterprises with payment licenses, the business range covers seven types of service such as online payment, bank card acquiring, mobile payment, etc., of which, the enterprises with regional pre-paid card licenses account for a large proportion, while the national payment license is still oriented by large-scale payment companies, which can be roughly divided into:

(1) Internet-based third-party payment enterprises, which grow from the internet payment business and provide account payment, gateway payment and integrated payment solutions, serving as the most active enterprise group in the entire third-party payment industry. Representative firms: Alipay, TenPay, 99Bill;

- (2) Bank card acquiring companies, which primarily render credit card services to merchants and individual users via installation of POS terminals for merchants, represented by ChinaUMS, Allinpay and Sandpay;
- (3) Innovative bank card acquiring enterprises, which promote credit card terminals through convenience outlets and individuals to meet personal life service payment, transfer, online shopping and other payment demand.
Representative firms: Lakala, RongTong Info&Tech co.,Ltd;
- (4) Mobile payment business-oriented enterprises, which, relying on mobile phone and other terminals, provide the mass users with support services based on mobile internet and near field communication (NFC) technology, represented by UMPay, Qiandai, three major operator payment companies;
- (5) Pre-paid card enterprises, chiefly referring to the payment companies providing pre-paid card issuance and acceptance business, represented by Beijing Shangfutong Network Technology, YuFu Network Technology, EKA.

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