

# ITS in Public Transport

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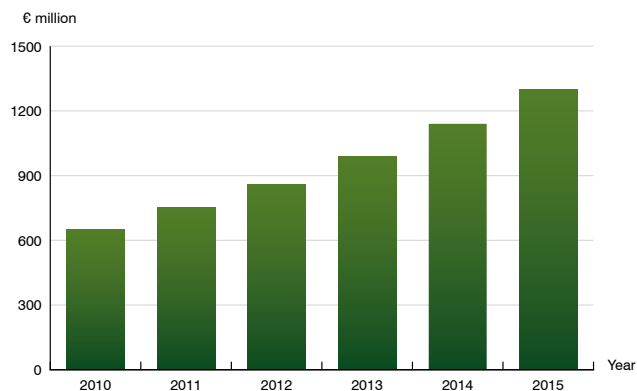


## Public transport ITS in Europe boosted by market deregulation

The term Intelligent Transport Systems (ITS) refers to information and communication technology applied to transport infrastructure and vehicles. Berg Insight's definition of ITS for public transport includes systems which are installed in public transport vehicles as well as at terminals, stops and similar. Included are also back-office IT systems which ensure that public transport services can be planned, scheduled and managed to achieve efficient operations. An important part of ITS for public transport is further solutions providing travellers with updated information about routes, departure times, possible disturbances and connecting services. The history of these different types of solutions dates back several decades and current state-of-the-art solutions include for example real-time intermodal journey planners, automated fare collection systems using smartcards, and on-board infotainment solutions with information about nearby points of interest.

Public transport plays an essential role in the European society. Approximately 60 billion public transport passenger journeys per year are carried out in the EU27. Available modes include for example local and regional buses and trolleybuses, regional and suburban rail transport, metros and trams, and local waterborne passenger transport services. A total of 737,000 buses and coaches account for 9.5 percent of the yearly passenger kilometres on land in Europe. The economic value of public transport services in Europe amounts to € 130–150 billion per year, which represents approximately 1–1.2 percent of the GDP. The public transport sector furthermore creates about 1.2 million direct employments in Europe, and an average of 2–2.5 indirect employments per direct job.

Berg Insight is of the opinion that the European market for ITS solutions for public transport is in a growth phase which will last for several years to come. Individual markets may however experience temporary fluctuations, depending on the political climate and local developments. The total market value for public transport ITS for buses and trams is forecasted to grow at a compound annual growth rate of 15 percent from € 0.65 billion at the end of 2010 to € 1.3 billion by 2015. The penetration of on-board computer units with GPS location functionality and wireless communication in buses and trams is estimated to increase from 30 percent in 2010 to 48.3 percent in 2015.



Market value of public transport ITS (EU27+2 2010 – 2015)

A group of international aftermarket solution providers have emerged as the leaders on the European market for public transport ITS. The dominant providers are INIT, Trapeze ITS and IVU, all based in the German speaking region and having substantial installed bases across a multitude of countries. Examples of companies with major market shares on national markets in Europe include INEO Systrans, which holds a leading position in France, and Vix Technology's recently acquired subsidiary ACIS which is a major vendor on the UK market. Other significant players include the Spanish company groups GMV and Grupo Etra, Swarco's subsidiary Mizar in Italy, the Norwegian company FARA and the German provider PSI Transcom.

All the major bus manufacturers on the European market have initiatives related to OEM bus telematics, however using very different strategies. Scania offers the same telematics features for buses as for the trucks, and MAN is planning to introduce a similar offering. Daimler has introduced a modified version of its fleet management system for trucks, adapted to better suit bus customers, while Iveco with the Irisbus brand collaborates with third party suppliers when fulfilling customer requirements for ITS. Volvo Group, in turn, offers functionality not only for conventional telematics and fleet management applications, but also real-time passenger information and traffic management.

The outlook for the European public transport ITS market is positive, as several major developments foster increased adoption of such technologies. The continent-wide deregulation of the public transport market creates a need for technologies which can handle the increasingly burdensome task of providing synchronised passenger information. International public transport related initiatives such as the EU project EBSF are also likely to increase the ITS adoption. Other contributing developments include UITP's sought-after doubling of the public transport ridership by 2025, the increasing environmental awareness and decreasing costs for ITS.

### This report answers the following questions:

- How is public transport organised and managed in the European countries?
- What is the geographical structure of public transport fleets in Europe?
- Which are the leading international and regional providers of aftermarket public transport ITS in Europe?
- What offerings are available from vehicle OEMs?
- What impact will the launch of standard factory installed on-board computers from the OEMs have on the market?
- How has the economic crisis affected the market for public transport ITS in Europe?
- How are the regulatory developments in Europe affecting the public transport ITS industry?
- How will the public transport ITS industry evolve in the future?

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## Glossary



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