ITS in Public Transport is the second consecutive report from Berg Insight analysing the latest developments on the intelligent transportation systems market for public transport in Europe.

This strategic research report from Berg Insight provides you with 190 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.

**Highlights from this report:**

- **Insights** from 30 new executive interviews with market leading companies.
- **New** data on vehicle fleets and public transport utilisation in Europe.
- **Comprehensive** description of the public transport ITS value chain and key applications.
- **In-depth** analysis of market trends and key developments.
- **Profiles** of 49 aftermarket ITS solution providers.
- **Summary** of OEM propositions from public transport vehicle brands.
- **Revised** market forecasts lasting until 2016.

**Berg Insight’s M2M Research Series**

What are the key business opportunities in the emerging wireless M2M market? Berg Insight’s M2M Research Series is a unique series of market reports published on a quarterly basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or vehicle telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

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How will the public transport ITS market develop in Europe?

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 backoffice 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 748,000 buses and coaches account for 8.6 percent of the yearly passenger kilometres on land in Europe. The economic value of public transport services in Europe amounts to around € 150–180 billion per year, which represents approximately 1–1.5 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 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 € 0.76 billion at the end of 2011 to € 1.53 billion by 2016. The penetration of on-board computer units with GPS location functionality and wireless communication in buses and trams is estimated to increase from 40.0 percent in 2011 to 56.1 percent in 2016.

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 Group 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 which is a major player on the UK market through the acquired business formerly known as ACIS. Other significant players include the Spanish company groups GMV and Grupo Eilar, Swarco’s subsidiary Swarco Mizar in Italy, the Norwegian company FAR and the German provider PSI Transcom.

All the major bus manufacturers have initiatives related to OEM bus telematics, however using very different strategies. MAN does not yet offer an OEM telematics system for its buses, though plans are to introduce such functionality. Scania currently offers the same telematics features for buses as for trucks and the company plans to introduce a wider range of bus-specific solutions. Daimler has introduced a modified version of its fleet management system for trucks, marketed as a bus-specific system, while Iveco with the Irisbus brand collaborates with third-party suppliers when fulfilling customer requirements for ITS. Volvo Group, in turn, offers solutions not only for conventional telematics and fleet management, but also traffic management functionality such as dispatching, traffic monitoring and real-time passenger information (RTPI).

The outlook for the European public transport ITS market is positive, as several major developments foster increased adoption of such technologies. International public transport related initiatives such as the EU project EBSF are likely to increase the ITS adoption, and 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. Notable trends in the ITS industry include the increasing integration of smartphone-based solutions, used for traveller-centric applications as well as business performance overviews for operators, and most recently also as affordable tracking solutions enabling RTPI.

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 solutions 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 solutions 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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