ITS in Public Transport

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

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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.

- **Updated Profiles** of 54 aftermarket ITS solution providers.

- **Summary** of OEM propositions from public transport vehicle brands.

- **Revised market forecasts** lasting until 2017.

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Public transport ITS market boosted by smart city initiatives

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 installed in public transport vehicles as well as at terminals, stops, depots 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 contactless cards or NFC-enabled handsets, 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 757,000 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 is estimated to around € 150–200 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 continue to 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 9 percent from € 0.94 billion in 2012 to reach € 1.44 billion by 2017. The penetration of on-board computers with GPS location functionality and wireless communication in buses and trams is estimated to increase from 42.5 percent in 2012 to 59.6 percent in 2017, varying considerably between regional markets.
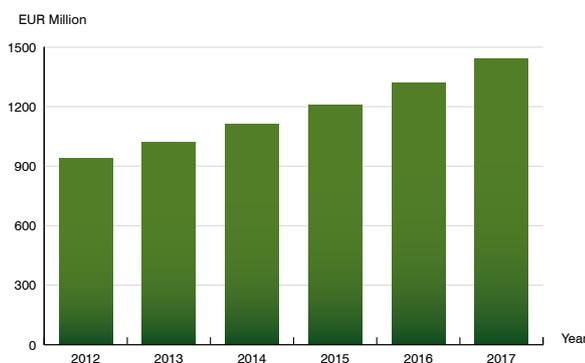
A group of international aftermarket solution providers have emerged as the leaders on the European market for public transport ITS. The dominant providers are Trapeze Group, INIT and IVU, all having headquarters in the German-speaking region and substantial installed bases across a multitude of countries in Europe and beyond. 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 provider on the UK market. Other significant players include the Spanish groups GMV, Indra and Grupo Etra, Swarco's subsidiary Swarco Mizar in Italy, the Norwegian provider FARA and the Belgium-based company Prodata Mobility Systems.

All the major bus manufacturers have initiatives related to OEM bus telematics. 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 collaborates with third-party suppliers when fulfilling customer requirements for ITS. MAN does not yet offer an OEM telematics system for its buses, though plans are to introduce such functionality. 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. Volvo Buses has been established as a notable player together with its telematics partner Consat Telematics.

The outlook for the European public transport ITS market is positive, as several major developments foster increased investments in such technologies. ITS adoption is likely to increase following international public transport related initiatives such as the EU project EBSF and associated efforts such as 3iBS and ITxPT. Contributing developments further include the ever-increasing environmental awareness and UITP's sought-after doubling of the public transport ridership by 2025. Another major driver is on-going global developments related to the concept of smart cities, where ITS in general and public transport ITS in particular constitute key elements to enable sustainable smart mobility.

Market value of public transport ITS (EU27+2 2012–2017)

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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About the Authors

Rickard Andersson is a Senior Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2010 and his areas of expertise include commercial vehicle telematics, LBS and mobile VAS.'

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