ITS in Public Transport is the fourth 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.
- **Profiles** of 60 aftermarket ITS solution providers.
- **Summary** of OEM propositions from public transport vehicle brands.
- **Revised market forecasts** lasting until 2019.

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Billion-euro public transport ITS market in Europe shows healthy growth

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, nationwide 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. A total of 56.8 billion public transport passenger journeys were carried out in the EU28 in 2012. 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 9.0 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 in 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 of public transport ITS for buses and trams is forecasted to grow at a compound annual growth rate of 7.2 percent from € 1.03 billion in 2014 to reach € 1.46 billion by 2019. The penetration of on-board computers with GPS location functionality and wireless communication in buses and trams is estimated to increase from 45.6 percent in 2014 to 58.2 percent in 2019, however 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 European 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 Indra, GMV and Grupo Etra, Swarco’s subsidiary Swarco Mizar in Italy, Atrom in Germany, Italy-based PluService, the Norwegian provider FARA and the Belgium-based company Prodata Mobility Systems which was acquired by Kapsch CarrierCom in July 2014. Volvo Group is moreover a notable player from the vehicle OEM segment, offering the ITS4mobility system in partnership with Consat Telematics in Europe. The system for example enables dispatching, traffic monitoring and real-time passenger information. Scania, Daimler and Iveco further offer some conventional OEM telematics features for its buses.

The outlook for the European public transport ITS market is positive, as several major developments encourage increased investments in such technologies. ITS adoption is likely to increase following international public transport related initiatives such as the EU project European Bus System of the Future (EBSF) and associated efforts such as 3iBS and iTxPT, as well as the next-generation EBSF_2 project launched in June 2015 at the UITP World Congress & Exhibition in Milan as part of Horizon 2020. Contributing developments further include the ever-increasing environmental awareness, the traffic congestion plaguing growing metropolitan areas and UITP’s sought-after doubling of the public transport ridership (PTx2) by 2025. Another major driver is the 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.

This report answers the following questions:

- What is the geographical structure of public transport fleets in Europe?
- How is public transport organised and managed in the European countries?
- 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?
- Which drivers and barriers are affecting 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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