

Public Transport ITS in Europe and North America



Public Transport ITS in Europe and North America is the sixth consecutive report from Berg Insight analysing the latest developments on the intelligent transportation systems market for public transport in these two regions.

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- **Insights** from 30 new executive interviews with market leading companies.
- **New data** on vehicle fleets and public transport utilisation in Europe and North America.
- **Comprehensive description** of the public transport ITS value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Profiles** of 69 aftermarket ITS solution providers.
- **Summary** of OEM propositions from public transport vehicle brands.
- **Revised** market forecasts lasting until 2022.



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Public transport ITS market boosted by smart city initiatives

The term Intelligent Transport Systems (ITS) refers to information and communications 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 and multi-operator journey planners, automated fare collection systems using contactless cards or NFC-enabled handsets for account-based ticketing, and advanced mobility analytics software.

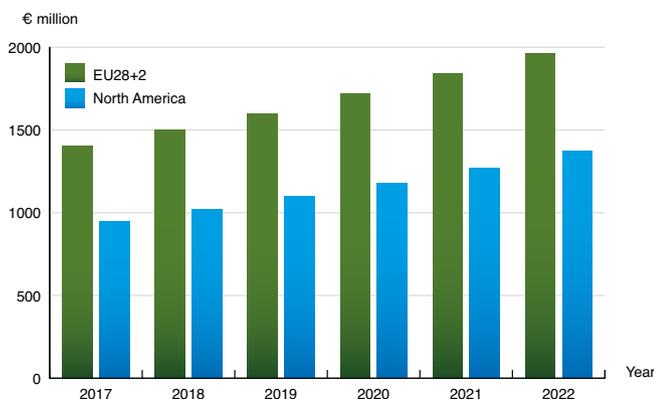
Public transport plays an increasingly important role in societies as a result of continuing population growth in cities and shifting consumer preferences. Approximately 60 billion and 13 billion public transport passenger journeys are carried out in Europe and North America respectively each year. Available modes include for example local and regional buses and trolleybuses, regional and suburban rail transport, metros and trams, and local waterborne passenger transport services. In 2016, the number of registered buses and coaches in Europe and North America reached 856,000 vehicles and 547,000 vehicles respectively, not including school buses. The economic value of public transport services in Europe is estimated to around € 150–160 billion per year, while the corresponding number in North America is around € 70–80 billion.

Berg Insight is of the opinion that the market for ITS in public transport is in a growth phase which will last for several years to come. Increased spending on ITS as a response to growing issues such as congestion, climate change and stagnating ridership numbers contribute to a positive market situation. Individual markets may however experience temporary fluctuations, depending on the political climate, austerity measures and local developments. The total market value of public transport ITS for buses and trams in Europe is forecasted to grow at a compound annual growth rate (CAGR) of 7.0 percent from € 1.40 billion in 2017 to reach € 1.96 billion by 2022. The penetration of on-board computers with GPS location functionality and wireless ►

► communication in buses and trams in Europe is estimated to increase from 80.4 percent in 2017 to 91.7 percent in 2022, however varying considerably between regional markets. In North America, the total market value of public transport ITS is forecasted to grow at a CAGR of 7.5 percent from € 0.95 billion in 2017 to reach € 1.37 billion in 2022 and the penetration rate is estimated to increase from 83.8 percent in 2017 to 93.1 percent in 2022.

A group of international aftermarket solution providers have emerged as leaders on the market for public transport ITS. Major providers across Europe and North America include Canada-based Trapeze Group and Germany-based INIT with significant installed bases in both regions. IVU is furthermore a dominant player primarily in the German-speaking part of Europe and has also expanded to North America. Clever Devices and Conduent hold leading positions on the North American public transport ITS market, and the latter is also an international provider of fare collection systems. Additional companies with major market shares in North America include Routematch, Cubic Transportation Systems and Avail Technologies. Examples of companies with major market shares on national markets in Europe include ENGIE Ineo and RATP Smart Systems which hold leading positions in France, and Vix Technology which is a major provider on the UK market. Other significant players include the Spanish groups GMV, Indra and Grupo ETRA, French Thales, Italy-based PluService, Atron in Germany, Scandinavian FARA and Consat, and the Austria-based companies Swarco and Kapsch PublicTransportCom. Volvo Group is moreover a notable player from the vehicle OEM segment, while companies such as Scania, Daimler, New Flyer and Iveco also offer some conventional OEM telematics features for their buses.

The outlook for the public transport ITS market is positive, as several major developments encourage increased investments in such technologies. The ITS market is likely positively affected by international public transport-related initiatives such as the ITxPT Association as well as APTA's standards programs for public transport vehicles and ITS. The development of ITS has in recent years focused on increasing the level of integration and utilising technology advancements for fare collection purposes. Another major driver is the ongoing 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 (EU28+2 and North America 2017–2022)

This report answers the following questions:

- How is public transport organised and managed?
- What is the geographical structure of public transport fleets in Europe and North America?
- Which are the leading international and regional providers of aftermarket public transport ITS solutions?
- 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?
- How are the regulatory developments in Europe and North America 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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