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

This strategic research report from Berg Insight provides you with 300 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 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 74 aftermarket ITS solution providers.
- **Summary** of OEM propositions from public transport vehicle brands.
- **Revised** market forecasts lasting until 2023.

**Berg Insight’s M2M Research Series**

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight’s M2M Research Series is a unique series of 40 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart homes, smart metering, fleet management and car telematics, or covers horizontal topics including IoT platforms, software, hardware, IoT connectivity statistics and the mobile operators’ IoT strategies.

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Public transport ITS is key to enable sustainable smart mobility

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 2017, the number of registered buses and coaches in Europe and North America reached 806,000 vehicles and 545,000 vehicles respectively, not including school buses. The economic value of public transport services in Europe is estimated to around €155–165 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 will continue to grow in the coming years. Challenges such as urbanisation, climate change and traffic congestion continue to spur investments in public transport ITS, contributing 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 6.8 percent from €1.07 billion in 2018 to reach €1.52 billion in 2023 and the penetration rate is estimated to increase from 89.0 percent in 2018 to 96.0 percent in 2023.

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. 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. Clever Devices is moreover about to expand into Europe, where the UK is the primary target. Additional companies with major market shares in North America include Cubic Transportation Systems and Avail Technologies. Examples of companies with major market shares on national markets in Europe include ENIGE Ineo and RATP Smart Systems which hold leading positions in France. Vix Technology, Flowbird and Ticketer are moreover major providers on the UK market, while IVU is a dominant player in the German-speaking part of Europe. Other significant players include the Spanish groups GMV, Indra and Grupo ETRA, French Thales, Atron in Germany, Scandinavian FARA and Consat Telematics, and the Austria-based companies Swarco and Kontron Transportation. Volvo Group is moreover a notable player from the vehicle OEM segment, while companies such as Scania, Iveco, Daimler and New Flyer 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 APTAs 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.

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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