

## Index

## Table of Contents

Table of Contents.....	i
List of Figures.....	vi
Executive summary.....	1
1 Public transport in Europe and North America.....	3
1.1 Modal split of passenger transport.....	5
1.2 Bus fleets and public transport utilisation .....	8
1.3 Market shares for bus and coach OEMs.....	11
1.4 Rail-borne public transport modes.....	12
1.4.1 Trams and light rail.....	13
1.4.2 Metro .....	14
1.5 Organisation and contracting in public transport.....	16
1.5.1 Legal framework in Europe .....	17
1.5.2 Legal framework in North America.....	18
1.5.3 Organisational forms and regional differences .....	19
1.6 Major public transport operators .....	21
2 ITS technologies and solutions .....	27
2.1 Public transport ITS infrastructure .....	28
2.1.1 Vehicle segment.....	30
2.1.2 Roadside segment .....	32
2.1.3 Backoffice segment.....	33
2.1.4 Traveller segment.....	35
2.1.5 GNSS segment .....	36
2.1.6 Network segment .....	37
2.2 Public transport management.....	41
2.2.1 Planning and scheduling tools.....	41
2.2.2 Computer aided dispatch systems .....	41
2.2.3 Traffic signal priority .....	42
2.2.4 Depot management .....	42

2.3	Traveller management.....	43
2.3.1	Passenger information .....	43
2.3.2	Entertainment .....	44
2.3.3	Fare payment .....	45
2.4	Driver management .....	46
2.4.1	Driving data registration and analysis.....	47
2.4.2	Eco-driving schemes.....	47
2.4.3	Video-based driver monitoring.....	48
2.4.4	Insurance risk management.....	48
2.5	Vehicle management.....	49
2.5.1	Vehicle diagnostics and maintenance planning .....	49
2.5.2	On-board security solutions.....	50
2.6	Business models and strategies .....	50
3	Market forecasts and trends .....	53
3.1	Market analysis.....	53
3.1.1	Market value forecast .....	53
3.1.2	Regional markets .....	56
3.1.3	Major vendors.....	57
3.2	Market drivers and barriers.....	60
3.2.1	Macroeconomic environment .....	60
3.2.2	Regulatory environment .....	62
3.2.3	Competitive environment .....	64
3.2.4	Technology environment .....	65
3.3	Value chain analysis .....	70
3.3.1	ITS and telematics industry players .....	70
3.3.2	Automotive industry players.....	77
3.3.3	Telecom industry players .....	79
3.3.4	IT industry players .....	82
3.4	Future industry trends .....	84
3.4.1	ITS adoption to grow alongside general IT maturity.....	84
3.4.2	Factory-fitted gateways and third-party systems to co-exist.....	85
3.4.3	Future public transport services must transform to be competitive with cars ....	85

- 3.4.4 Shared mobility and public transport ecosystems to converge ..... 86
- 3.4.5 Mobile devices assume multiple important roles in the ITS infrastructure ..... 87
- 3.4.6 Public transport stakeholders invest in autonomous vehicles..... 88
- 4 OEM products and strategies ..... 89
  - 4.1 Daimler..... 89
  - 4.2 Iveco ..... 93
  - 4.3 MAN Truck & Bus ..... 95
  - 4.4 Scania..... 97
  - 4.5 Volvo Group..... 99
  - 4.6 New Flyer..... 103
  - 4.7 Gillig..... 104
  - 4.8 Alexander Dennis..... 105
  - 4.9 VDL ..... 105
  - 4.10 Van Hool ..... 106
- 5 Aftermarket solution providers..... 109
  - 5.1 International ..... 109
    - 5.1.1 GIRO..... 110
    - 5.1.2 INIT ..... 112
    - 5.1.3 IVU..... 117
    - 5.1.4 Kapsch CarrierCom..... 122
    - 5.1.5 Thales ..... 125
    - 5.1.6 Trapeze Group ..... 128
    - 5.1.7 Xerox ..... 133
  - 5.2 Germany and Eastern Europe..... 136
    - 5.2.1 Atron ..... 136
    - 5.2.2 i-Cell..... 139
    - 5.2.3 ICOM ..... 140
    - 5.2.4 DILAX Group ..... 142
    - 5.2.5 HaCon ..... 143
    - 5.2.6 METRIC ..... 144
    - 5.2.7 Nettropolis ..... 145
    - 5.2.8 PSI Transcom..... 146

5.2.9	R&G .....	149
5.2.10	Radcom .....	150
5.2.11	Scheidt & Bachmann .....	151
5.2.12	Siemens.....	152
5.2.13	UTI .....	154
5.3	France, Benelux and the UK.....	155
5.3.1	21st Century Technology .....	156
5.3.2	Actia.....	158
5.3.3	Comatis .....	161
5.3.4	GreenRoad .....	162
5.3.5	Hanover Displays .....	164
5.3.6	Ineo Systrans.....	165
5.3.7	Lumiplan.....	168
5.3.8	Maestronic.....	170
5.3.9	Masabi .....	171
5.3.10	MiX Telematics .....	172
5.3.11	Navocap (Ixxi).....	176
5.3.12	Omnibus .....	178
5.3.13	Sabatier Geolocalisation .....	180
5.3.14	Vix Technology .....	181
5.4	The Mediterranean.....	184
5.4.1	GMV.....	184
5.4.2	Goal Systems .....	188
5.4.3	Grupo Etra.....	189
5.4.4	Indra .....	191
5.4.5	Link Technologies .....	194
5.4.6	Metatronix and Digigroup Informatica.....	196
5.4.7	PluService.....	196
5.4.8	Selex ES .....	199
5.4.9	Swarco.....	200
5.4.10	Tecmic.....	204
5.5	The Nordics .....	205

5.5.1 Consat ..... 206

5.5.2 FARA..... 207

5.5.3 Fältcom..... 210

5.5.4 Hogia ..... 211

5.5.5 Icomera ..... 213

5.5.6 Pilotfish ..... 215

5.5.7 Thoreb ..... 218

5.5.8 Traffilog Nordic..... 220

5.5.9 TriNorth Solutions ..... 222

5.5.10 Trivector..... 223

5.5.11 Vehco ..... 224

5.6 North America..... 226

5.6.1 Accenture ..... 226

5.6.2 Avail Technologies ..... 227

5.6.3 Bytemark ..... 228

5.6.4 Clever Devices..... 229

5.6.5 Cubic Transportation Systems..... 231

5.6.6 Ecolane..... 233

5.6.7 ISR Transit ..... 234

5.6.8 Luminator Technology Group ..... 235

5.6.9 RouteMatch ..... 237

5.6.10 TransLoc..... 238

5.6.11 Zonar Systems ..... 241

Glossary ..... 245

## Index

## List of Figures

Figure 1.1: Modal split of passenger transport on land (EU-23+2 2014) .....	6
Figure 1.2: Modal split of passenger transport on land (North America 2014) .....	7
Figure 1.3: Bus statistics – vehicle stock, new registrations & passenger-km (EU23+2).....	9
Figure 1.4: Bus statistics – vehicle stock, new registrations & passenger-km (NA).....	10
Figure 1.5: Bus & coach (>3.5t) market shares, by group & brand (EU26 + EFTA 2015) .....	11
Figure 1.6: Heavy-duty transit bus segment market shares, by brand (NA 2015) .....	12
Figure 1.7: Largest Metro Networks in Europe and North America (2016) .....	15
Figure 1.8: Key figures on major public transport operators.....	22
Figure 1.9: Market presence for major transport operators (EU23+2 & NA 2015) .....	25
Figure 2.1: Public transport ITS infrastructure overview .....	29
Figure 2.2: Examples of on-board equipment installed in public transport vehicles .....	31
Figure 2.3: ITS equipment in buses and light rail in the United States (2015) .....	32
Figure 2.4: Example of public transport ITS backoffice segment .....	34
Figure 2.5: Examples of app-based journey planner and smartcard payment solution .....	36
Figure 2.6: Mobile network operators in Europe and North America (2016) .....	39
Figure 2.7: Fare Payment Technologies.....	46
Figure 3.1: Public transport ITS market value and penetration (EU28+2 2015–2020) .....	54
Figure 3.2: Public transport ITS market value and penetration (NA 2015–2020) .....	55
Figure 3.3: Major public transport ITS providers .....	58
Figure 3.4: Financial data for leading ITS and telematics industry players.....	72
Figure 3.5: Key data for companies and groups active in ITS for public transport.....	74
Figure 3.6: Mergers and acquisitions among companies active in public transport ITS .....	75
Figure 3.7: Mobile operators in Europe by M2M subscriber base (Q2-2016).....	80
Figure 3.8: Mobile operators in North America by M2M subscriber base (Q2-2016) .....	81
Figure 5.1: Product overview of INIT’s offering.....	113
Figure 5.2: INIT’s ECOdrive driver panel .....	115
Figure 5.3: Overview of IVU.suite.....	119
Figure 5.4: Overview of the MobiGuider platform.....	124

Figure 5.5: Overview of the Trapeze System ..... 130

Figure 5.6: Actia’s new-generation Podium dashboard with driverAID function..... 159

Figure 5.7: Ineo Systrans’ UCINEO on-board computer and TACTILEO driver interface..... 166

Figure 5.8: MiX Telematics’ RIBAS display ..... 174

Figure 5.9: Pilotfish’s Vehicle Gateway VG210..... 217

Figure 5.10: TransLoc Rider App ..... 240

