



ADVANCING
PUBLIC
TRANSPORT

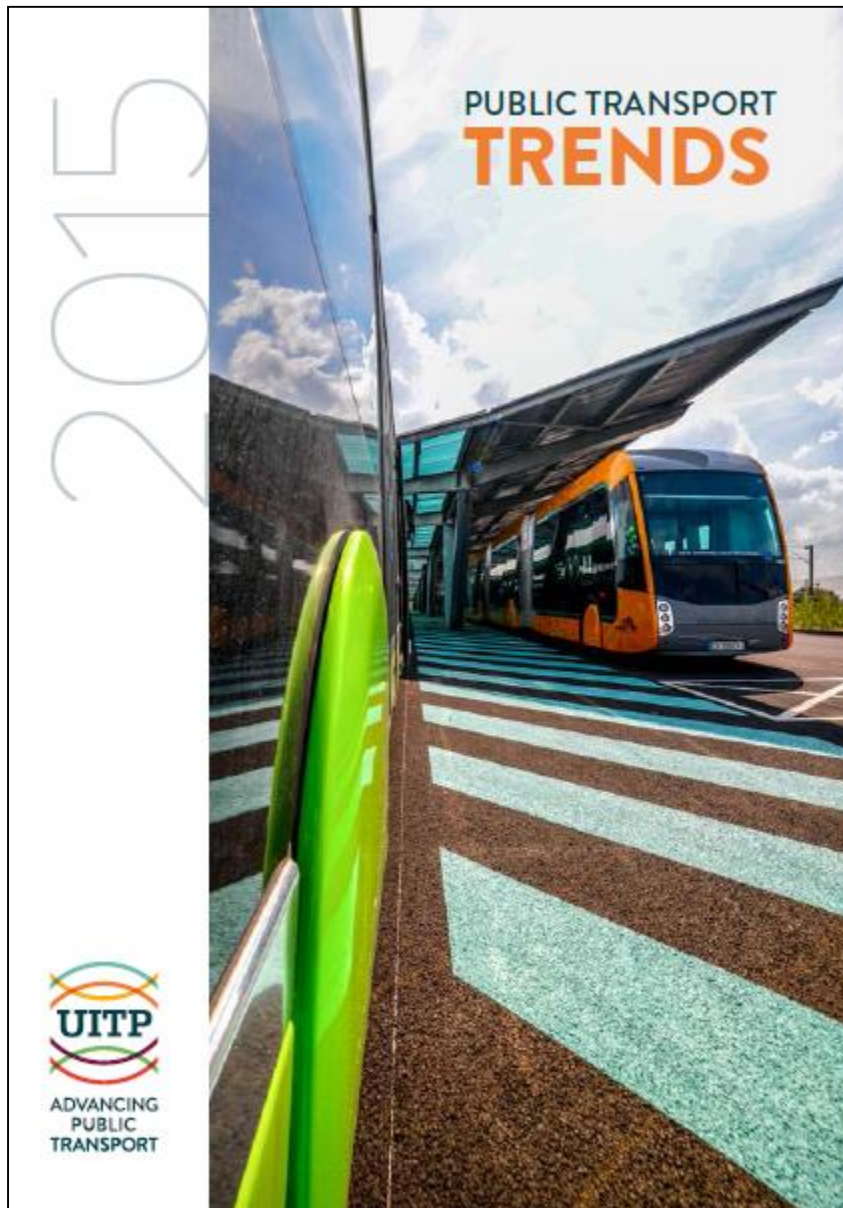
URBAN AND PUBLIC TRANSPORT TRENDS ACROSS THE GLOBE

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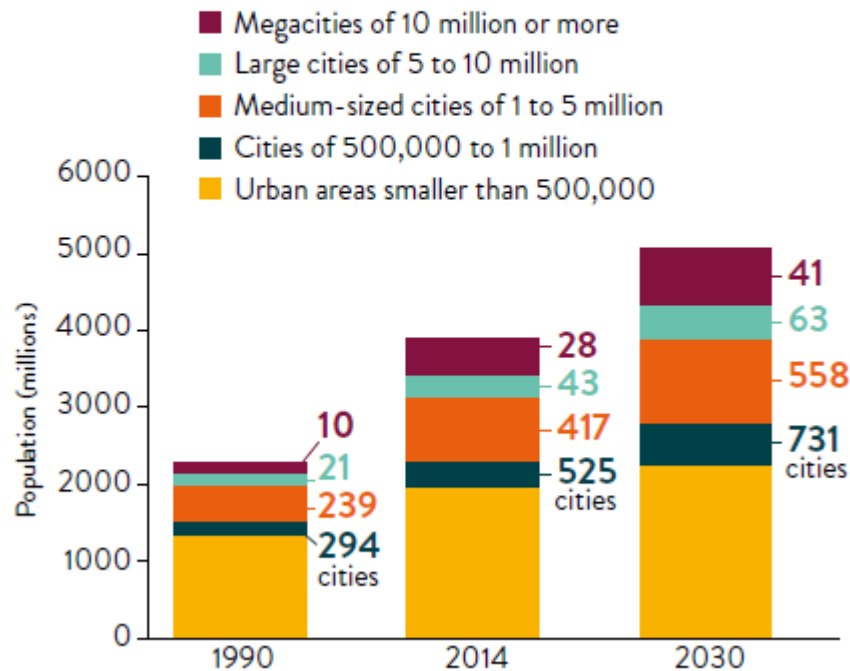
This report focuses on the **most significant developments that already have an effect** on the mobility market in general and public transport in particular.

It is neither an exhaustive analysis of all trends, nor a prospective study.

1. DEMOGRAPHIC TRENDS AND MOBILITY IN URBAN AREAS: A GLOBAL MOVE TO THE SOUTH-EAST

FIGURE 1: GLOBAL URBAN POPULATION GROWTH IS PROPELLED BY THE GROWTH OF CITIES OF ALL SIZES

Source: Undesa (United Nations, Department of Economic and Social Affairs, World Urbanization Prospects: The 2014 Revision, Highlights, 2014 - page 13 2)

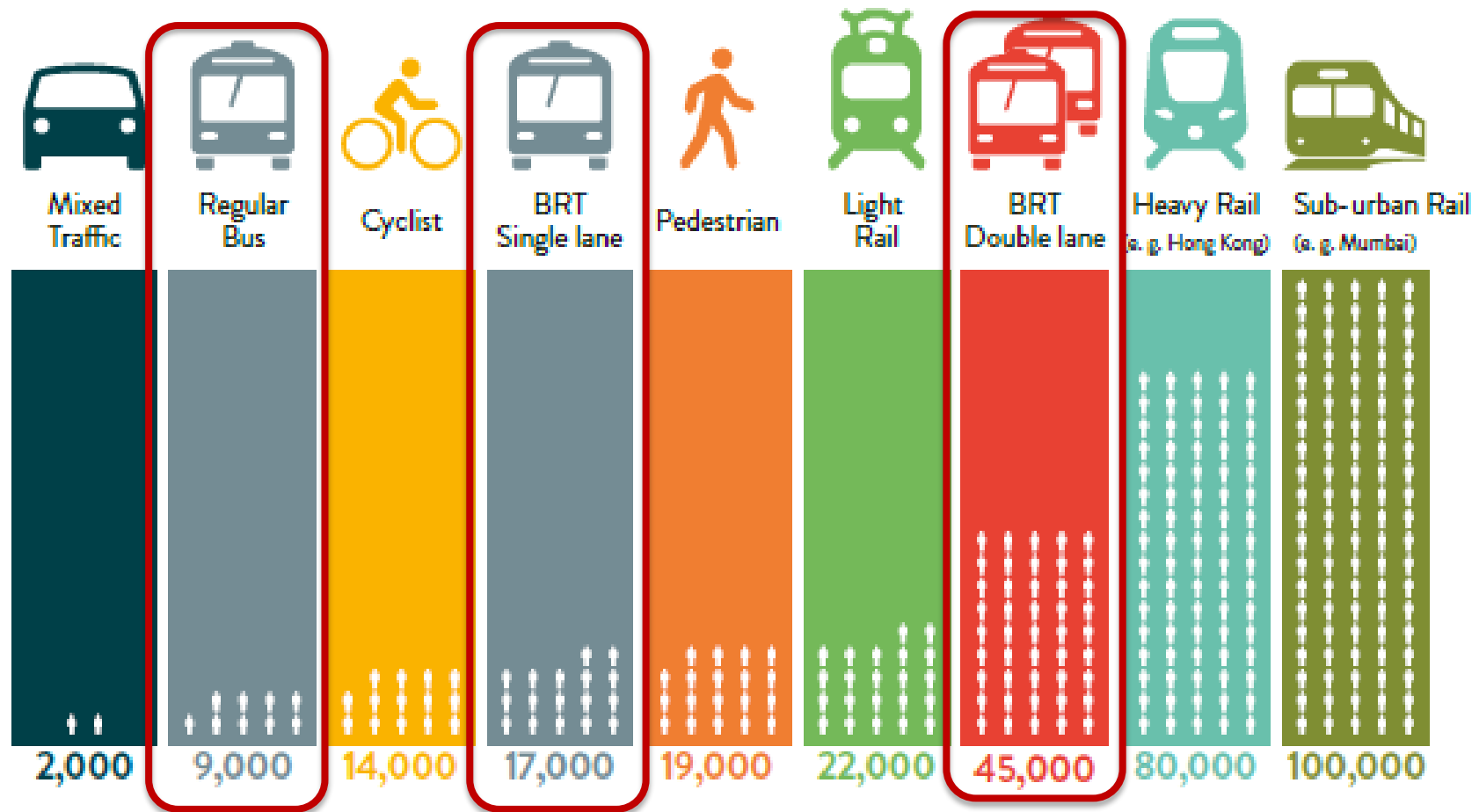


India, China and Nigeria alone are expected to represent 37% of the growth of the world's urban population between 2015 and 2050.

Cities of less than 10 million habitants in **developing countries will provide nearly 40 percent of global growth by 2025.**

CHOICE OF MODES: THE REVIVAL OF THE BUS

FIGURE 3: CORRIDOR MAXIMUM CAPACITY OF URBAN TRANSPORT MODES, IN PERSONS PER HOUR IN BOTH SENSES Source: GIZ and TU Delft



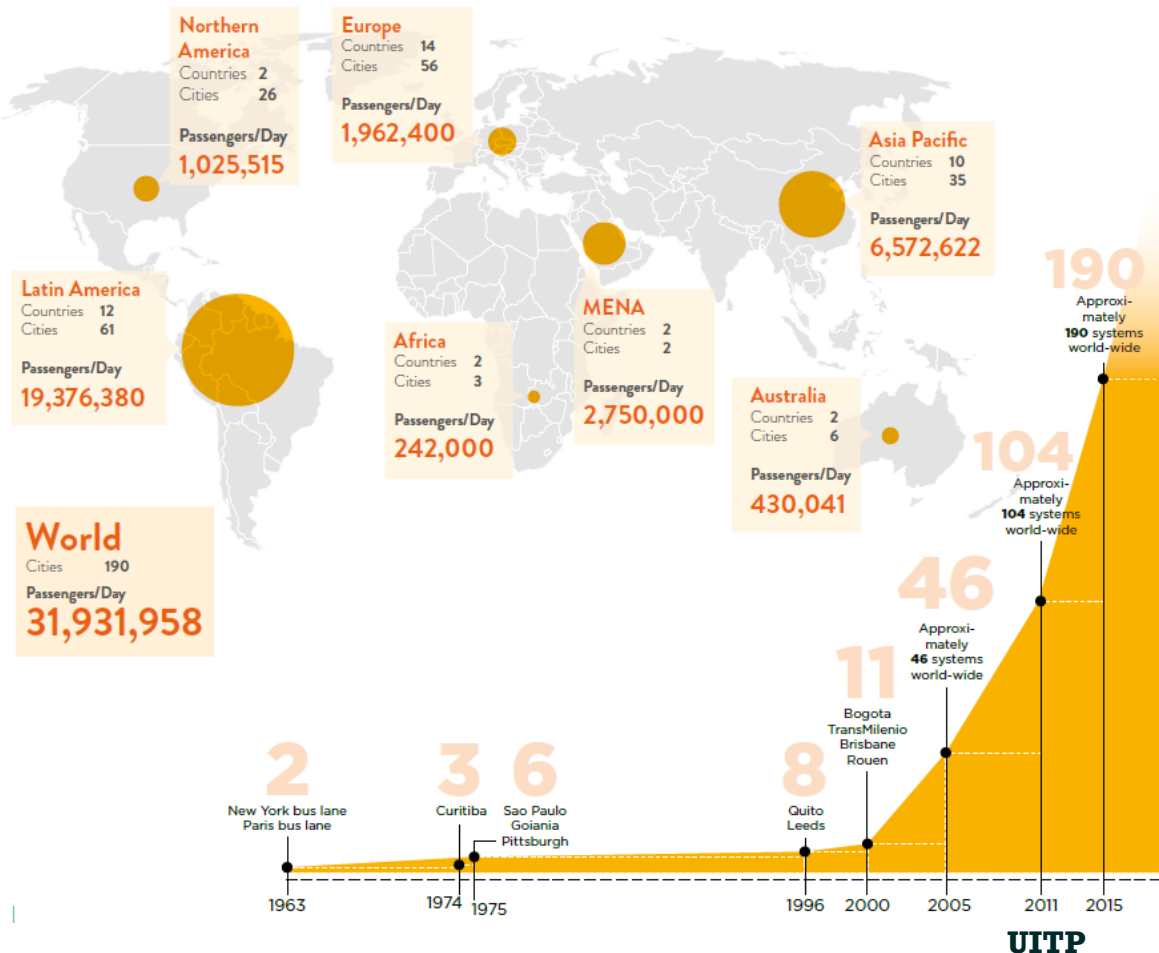
THE RIGHT MODES FOR THE RIGHT CITY

The **capacity** of systems is often overlapping.

Preferences and selection of modes are **political choices** linked to **costs** and **local preferences**

FIGURE 4: BRT WORLD PANORAMA

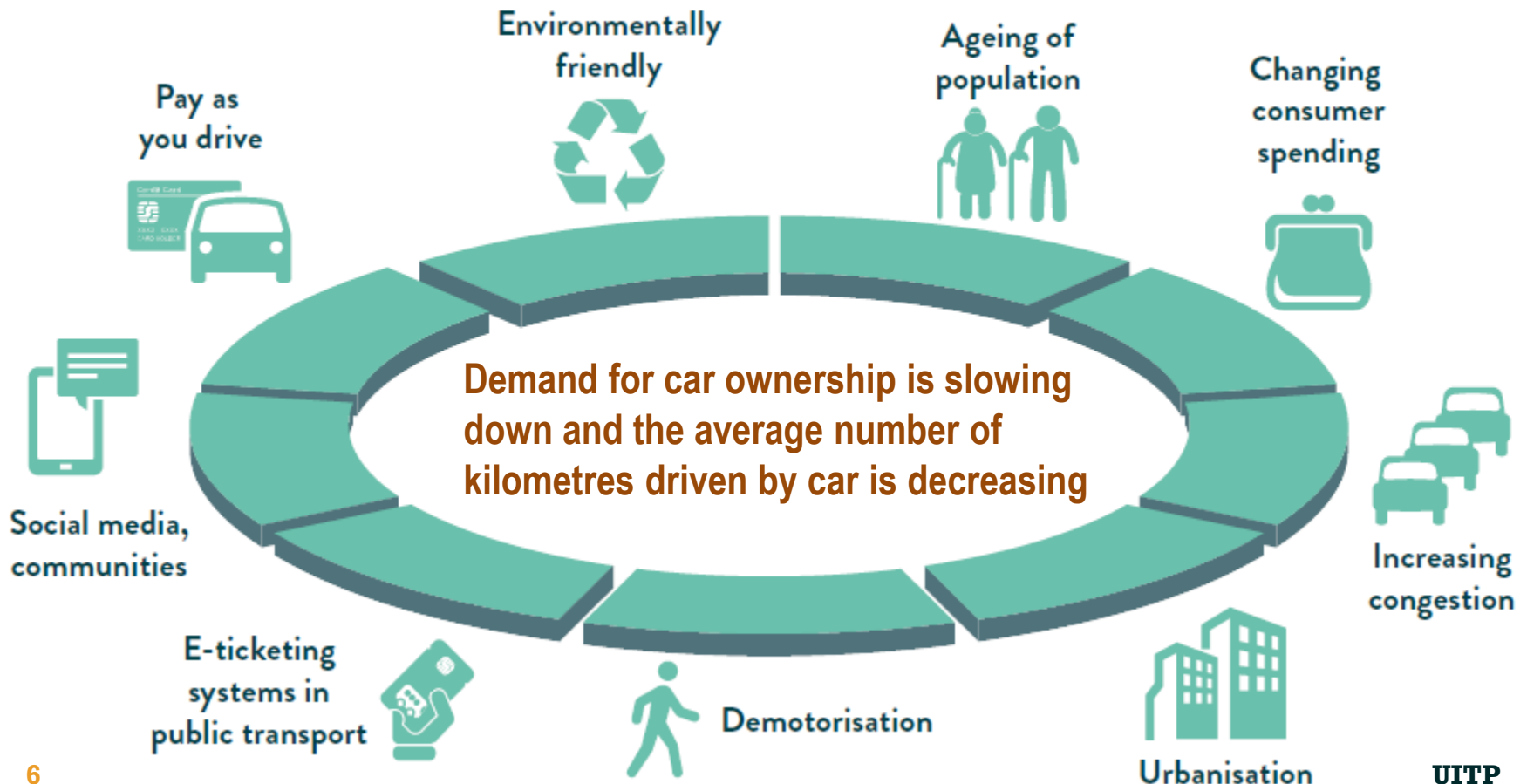
Source: brtdata.org, embarq



DE-MOTORISATION IN INDUSTRIALIZED COUNTRIES

FIGURE 5: TRENDS DRIVING A CHANGE IN THE RELATIONSHIP WITH THE CAR

Inspired by: Frontier Group/U.S. PIRG Education Fund: 'A New Direction - Our Changing Relationship with Driving and the Implications for America's Future', 2012



2. GOVERNING AND PROVIDING MOBILITY IN CONNECTED CITIES

Challenges and opportunities for our sector

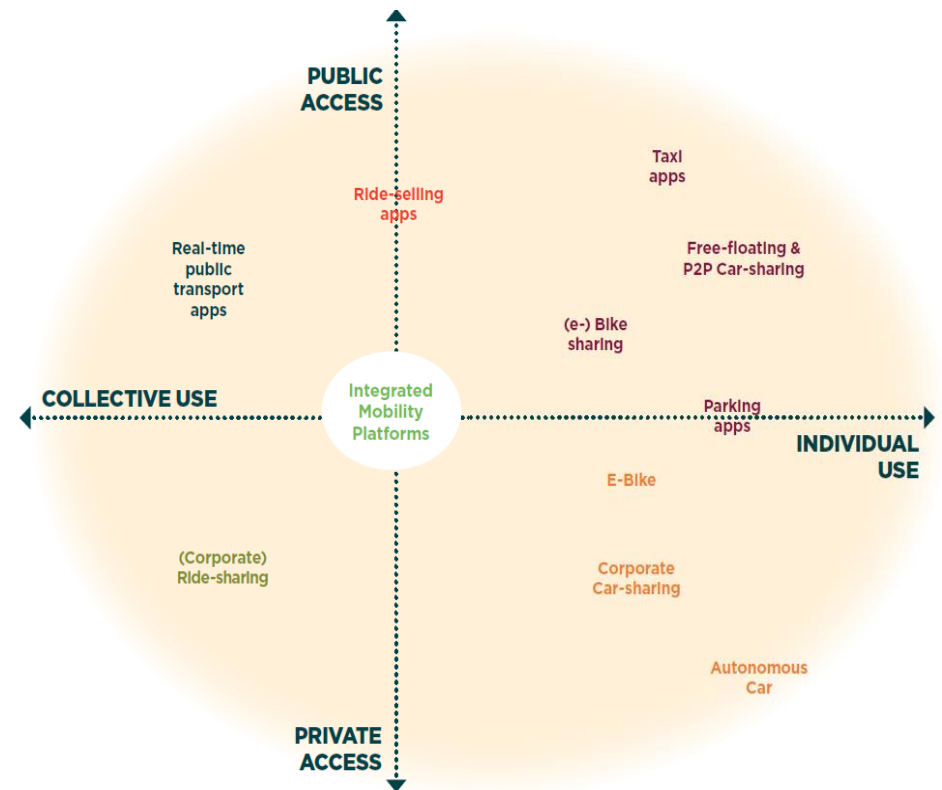
- Develop a vision about digitalization across the urban transport system
- Assess the opportunities offered by technology and new mobility services
- Define the role PTOs and PTAs want to play in the organisation and provision of mobility services
- Accept the emergence of new players
- Consider open solutions to tap into the potential of fast innovators while retaining our central role
- Reinforce the message that a strong public transport backbone is the condition for the emergence of a sustainable urban mobility system welcoming new services



MOBILITY PLATFORMS

84 out of the 86 public transport companies worldwide surveyed by UITP in 2014 see combined mobility as an opportunity for their organisation.

One-stop-mobility shops or integrated mobility platforms are emerging, bringing convenience, time, and cost savings to the traveler.



4. MARKET STRUCTURE – GLOBALISATION AND EMERGING PLAYERS RESTRUCTURING ON THE OPERATOR SIDE

Emergence of **large transnational passenger transport operators** in several markets, with varying maturities and opportunities.

**Traditional public transport industry
vs. newcomers**

Liberalisation encouraged **new entrants** to develop a mix of improved service quality and better price. **Several non-European players** have entered the global market, including in Europe.

THE SUPPLY INDUSTRY

The manufacturing industry continues to be **very fragmented**: The markets for rail systems and city buses are each served by just **a handful of big players** with multi-billion turnovers, followed by a multitude of second-tier companies

The market is characterised by **low volumes, high customisation, high R&D needs and long cycles**

Profitability in this sector is generally **low**



R & I + THE EUROPEAN
SHIFT2RAIL EXAMPLE

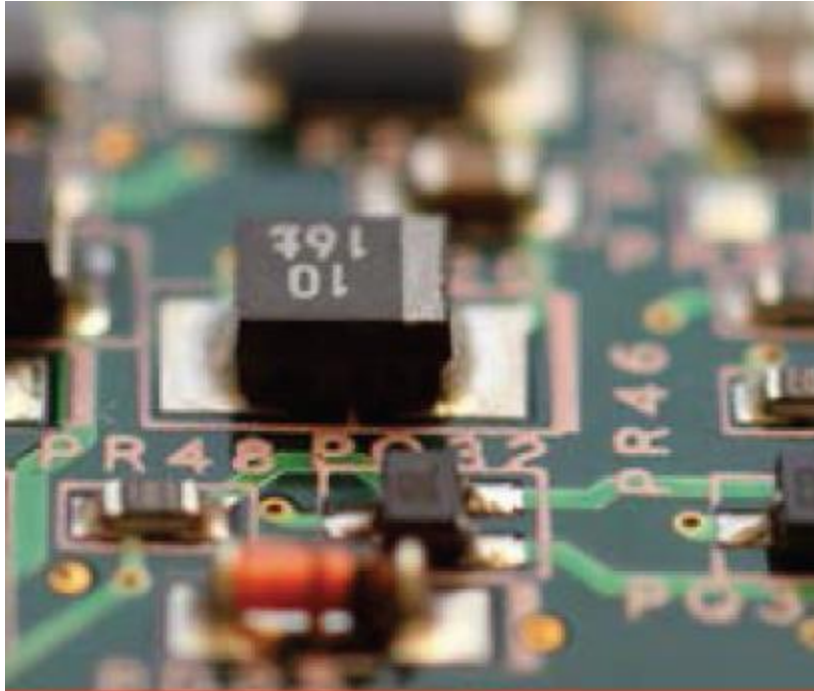


SUPPLY INDUSTRY - CONTINUOUSLY ADAPTING TO GLOBALIZATION

- Market value of railway equipment has grown by about 50% over the last decade (from € 100 billions to € 150 billions), with this growth expected to continue.
- LRT is expected to become a stronger segment
- The bus industry will be strongly affected by the rise of electromobility



ADVANCED TECHNOLOGIES



The invisible threat:
obsolescence

Proprietary vs. open source

Focus example:
E-bus plugs
standardization

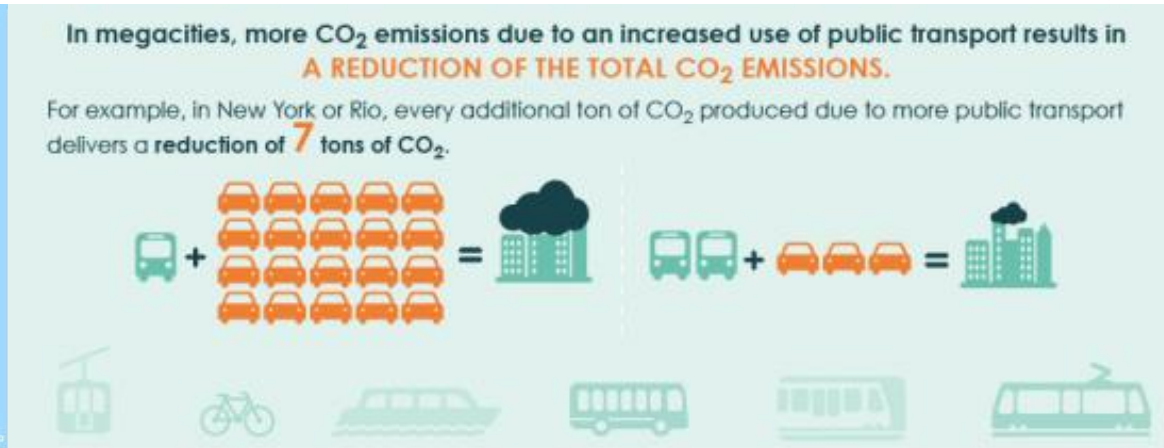


PLUGGING IN PUBLIC TRANSPORT IN ITS URBAN ENVIRONMENT

- Technological solutions may open up opportunities for further integration:
 - of the urban transport system
 - Convergence of the modes
 - Cooperation between road, rail and energy industries
 - of the urban transport system with its environment, in particular at nodes



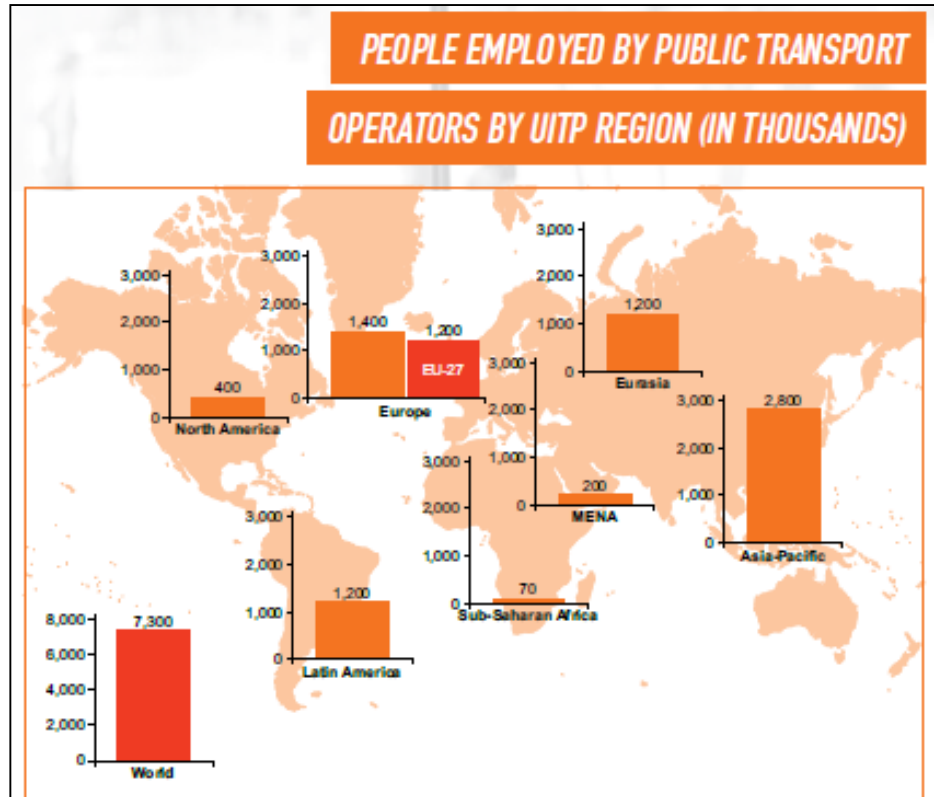
THE KEY ROLE OF PUBLIC TRANSPORT IN FIGHTING CLIMATE CHANGE



Transport systems are considered to be among the most important aspects of building city resilience.



6. PT*2: PUBLIC TRANSPORT FOR JOBS AND GROWTH



- For the same amount of money invested, PT creates 25% more jobs than road infrastructures

- In cities with a high share of public transport, the cost of transport to the community can be as much as 50% lower

PT*2 requires for the sector to be able to attract a committed work force: become an attractive employer and develop employer branding

Thank you !

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