Global PT Trends, Challenges and Developments

Feyzullah GÜNDOĞDU, UITP
Global PT Trends and Developments
RIDERSHIP IS RECOVERING AT DIFFERENT PACES AROUND THE WORLD

Source: UITP
WHAT IS HAPPENING AROUND THE WORLD?

USA & Canada
Agencies achieved 75-80% of ridership. However, the smaller cities are doing better than big cities and have achieved 100% of pre-pandemic level.

Istanbul
110% compared to pre-pandemic

Dubai
110% compared to pre-pandemic

Australia
Post-COVID Travel Pattern changes are negatively affecting ridership levels region-wide.
UITP Ridership Data Collection 2024

- Launched the new ridership data collection in April 2024 which will take place 4 times a year
- Will collect data for more than 50 cities around the world

*Reference period - 3 weeks before Carnival holiday (i.e. end of January 2020). During the summer period, normal ridership is at approximately 70% of this value.
ELECTRIFICATION IS A GLOBAL TREND, BUT THE SUPPLY CHAIN EXPERIENCE CHALLENGES
WHAT IS HAPPENING AROUND THE WORLD?

China
Leading with 378,700 e-buses (50% of total fleet) currently. Over 90% of new bus sales are electric.

ANZ
Zero Emission Bus Fleet conversion is a high priority. Challenges however in meeting designated 2025/2030 targets. In Australia, strong emphasis on Local Manufacturing Content for buses, trams and trains.

USA & Canada
There is funding availability for zero emission buses in NA. However, there is big shift in favour of hydrogen buses compared to electric buses. Further, the supply is big challenge.

India
Large scale implementation of Zero Emission Buses. Launched new scheme for 10,000 e buses across various cities. New EV Policy to boost EV manufacturing in the country.

Turkey
Ambition to have net zero public transport system by deploying e-bus. Discussion started on Hydrogen bus.

Africa
Acquisition of second-hand buses vehicles (Gabon, Cameroun, and Algeria allow “passenger transport operators to import buses dedicated to this service, less than five (5) years old).

Chile
5,083 electric buses in operation across Latin America with over 2,000 are in Chile.
UITP ACTION POINT

- **National Workshop for International Electric Bus OEMs**
  -零排放公交车，多伦多（16-18 Sep）
  -电车运营与维护（西班牙语）马德里（24-26 Sep）
  -迪拜电车文凭（3模块）
  -圣弗朗西斯科电车（13-15 Nov）
  -深圳电车周（18-22 Nov）

E-bus training
DIGITAL APPLICATIONS ARE DEPLOYED AT MULTIPLE LEVELS – OPERATION, MAINTENANCE, PAYMENT, APPS ETC
**WHAT IS HAPPENING AROUND THE WORLD?**

- **Brazil**
  - Digital payments both via PIX (Brazilian instant payment) and Whatsapp are one of the technological transformation processes that have impacted the region.

- **USA**
  - Cities are exploring the use to Generative AI to automate customer care, preventive maintenance and for fraud detection.

- **Dubai**
  - RTA Dubai signed collaboration agreement with UN Committee of Experts on Big Data and Data Science.

- **Malaysia**
  - PRASARANA Malaysia Bhd is digitising data and automating processes to improve customer experience.
UITP ACTION POINT

Working Group on “AI in Public Transport”

Working topics:
- Passenger Guidance, Accessibility and Personalized Interaction
- Assistance to frontliners/Customer Care
- Video Analytics
- Ethics & Regulatory
- Operational Efficiency

Deployment of national ticketing systems is increasingly implemented or considered
WHAT IS HAPPENING AROUND THE WORLD?

**Europe**
The deployment of national ticketing systems is implemented or considered in an increasing number of countries (DN, NL, DE, FR, etc.), with potential impacts on fares.

**New Zealand**
National Ticketing System in development with a potential impact on fares.

**India**
Launched National Common Mobility Card to offer national ticketing.

Open Loop Ticketing
Many cities around the world are implementing Open Loop Ticketing.
UITP ACTION POINT

Future Ticketing Platform

Open Loop Payment Forum
GROWING OPERATING COSTS VS. STAGNATING / DECREASING REVENUES

Source: UITP
WHAT IS HAPPENING AROUND THE WORLD?

**Canada**
Many cities are looking for PPP model to develop the new infrastructure.

**New Zealand**
Growing interest in PPP models for new infrastructure development.

**Africa**

**India**
PPP in rail – no ownership of rolling stock, new model adopted by KRIDE / Increasing focus on non-farebox revenue / Payment Security Mechanism.

**Singapore**
Increased subsidy pressure i.e. S$1 per journey and need to find more revenues options. Increasing focus on TOD in Asia.

**Latin America**
Previously was largely driven by Private sector. However, things are changing due to uncertain demand post-pandemic. Cities need to review contracts and design new contracts that have different approaches and required to provide greater economic participation and also with more guarantees. At the same time, e-bus projects demand new actors in business modeling.

**New Zealand**
Growing interest in PPP models for new infrastructure development.
UITP ACTION POINT

OUTLOOK 2022: FARE REVENUES & POLICIES

- 80% of respondents report fare revenues is still affected (10-30%), no positive impact on revenues were reported
- The deployment of digital solutions is still seen as a key opportunity
  - Revision of the fare structure and development of new products follow closely behind, especially in EU
  - Interest in free fares as grown from previous surveys both in US and EU

71 international respondents (2022)

UITP Survey - Economic Outlook 2024
LABOUR SHORTAGE IS A CRITICAL CHALLENGE AND GROWING NEEDS FOR CAPACITY BUILDING
WHAT IS HAPPENING AROUND THE WORLD?

USA & Canada
There is huge shortage of drivers and maintenance staff. Many cities are cutting down services owing to unavailability of drivers.

Latin America
Rail systems demand new labor, due to strong retirement pressure, and in the bus sector, trams demand a more qualified workforce with new skills.

Europe
Labour shortage remains a critical challenge, with the discussions increasingly addressing remunerations and productivity.

ANZ
Ongoing skilled workforce shortages across the sector.
For bus drivers, temporary relief in NZ gained through a specialized immigration scheme that brought in a large number of drivers from the Philippines.

Japan
Reduced service or eliminate some route due to bus drivers’ shortage.

Hong Kong
Will open application for 8,000 non-local workers.

Singapore
Offering S$10K sign-on bonus and S$5,000 salary, attracting drivers from Malaysia.
UITP Taskforce on Labour Market Transformation
Massive urban rail projects ongoing in many countries and BRT systems in emerging / developing countries.
WHAT IS HAPPENING AROUND THE WORLD?

Turkey
Massive urban rail projects ongoing in Istanbul with a 17 projects. Renovation of rail systems including vehicles.

Dubai
New Blue line extension launched.

India
Development of urban rail infrastructure expansion of existing systems and introduction of newer systems.

Africa
BRT Development and New Urban Rail projects.

USA & Canada
Cities are investing in new BRT in both US and Canada. Many cities are also expanding their existing network.

China
Significant railway developments in AP in particular in China: with 47 cities now housing metro systems spanning over 10,000 km in operation. With current 42,000 km network, China's high-speed rail infrastructure is still growing.

ANZ
Significant investment in rail service ‘upgrades’ - in Queensland (for 2032 Summer Olympics), NSW, Victoria and WA especially. In NZ, large passenger rail rolling stock procurement underway.
**UITP ACTION POINT**

**eBRT 2030**

- **45 partners** from across the EU
- January 2023 - December 2026
- Real-life demonstrations in 7 cities

**European Bus Rapid Transit of 2030**

**Faster delivery of rail projects**

**Core Group**

- CCR
- MTR
- FGC
- TMB

**Transports Metropolitans de Barcelona**
Growing policies for demand management and access restriction for cars
WHAT IS HAPPENING AROUND THE WORLD?

**Turkey**
- SUMP’s are in the agenda of many cities in Turkey

**Saudi Arabia**
- The projects of NEOM and Red Sea Global are taking attention

**India**
- Discussion started on launching Low Emission Zones in the country

**USA**
- New York will be the first city in North America to launch Congestion Charging from June 2024

**Europe**
- Ambitious policies for demand management and access restriction for cars spread across an increasing number of cities and raise political tensions in some cases
UITP ACTION POINT

Governance of On-demand Mobility Services

First and Last Mile: Walkability in MENA

LEZ project in India
THE SHARED MOBILITY MARKET CONTINUES TO GROW
WHAT IS HAPPENING AROUND THE WORLD?

**China**
The aspiration to develop autonomous buses: Shenzhen, in particular, emerges as an innovation hub for driverless taxis, led by entities like Pony.ai, Baidu, DeepRoute, and AutoX. Baidu holds the distinction of operating unmanned taxis.

**Turkey**
Micro mobility, scooter implemented widely but still under discussions for business model.

**Dubai**
Planning to launch Urban Air Taxi by 208.

**USA**
Waymo is expanding its fully autonomous robotaxis in more cities (SF and LA).

Bird is out of bankruptcy and consolidate in NA.

Many cities are launching microtransit / On-demand bus.

**Europe**
Micromobility market is consolidating – International players leff

**dott**

**TIER**

**UITP**
UITP ACTION POINT

UITP Shared Mobility Division

UITP WG Automated Mobility
Large events are an opportunity to develop public transport
WHAT IS HAPPENING AROUND THE WORLD?

Australia
Brisbane to host the 2032 Summer Olympics. Will be the first ‘Climate-Positive’ Olympics, with more carbon savings generated than emissions.

Saudi Arabia
Bidding for 2034 FIFA World Cup

USA, Canada & Mexico
Will be hosting FIFA World Cup in 2026

Los Angeles will be hosting Olympics 2028
UITP ACTION POINT

2008-09

- Established WORKING GROUP ON PUBLIC TRANSPORT & LARGE EVENTS (Italy, France, UK, Germany, Belgium, Greece, China, South-Africa)
- Published checklist on "Handling Transport projects" and "Crowd Management"

2009-2013

- Established WORKING GROUP ON PUBLIC TRANSPORT & LARGE EVENTS (Italy, France, UK, Germany, Belgium, Greece, China, South-Africa)
- Published checklist on "Handling Transport projects" and "Crowd Management"
- SEMINAR on "Public Transport and Large Events" (Recife, Brazil)
- SEMINAR on "Intelligent Traffic Solutions for Large Events - MENA PT and Large Events Summit" (Doha, Qatar)
- ROUND TABLE on "Transport services for major international events" (Sochi, Russia)

2024 -

- June 2024: One day Workshop to discuss the role of Transit and handling Large events
- October 2024: Two days Workshop with key members around the world and launch of WG
QUESTIONS?