

Intelligent Railway Transport System Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Devices & Components (Rail Sensors, Smart Cards and Video Surveillance Cameras), By Solutions (Passenger Information System (PIS) and Advanced Security Management System), By Region & Competition, 2019-2029F

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Abstracts

Global Intelligent Railway Transport System Market was valued at USD 82.70 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 18.31% through 2029. Governments worldwide are investing in intelligent transportation solutions to modernize rail infrastructure and address transportation challenges. Initiatives such as the European Rail Traffic Management System (ERTMS) and similar efforts in other regions aim to standardize and improve the interoperability of railway systems, fostering the growth of IRTS.

Key Market Drivers

Increasing Urbanization and Population Growth

The rapid pace of global urbanization and population growth is a significant driver propelling the Intelligent Railway Transport System (IRTS) market. As more people migrate to urban areas, the demand for efficient and sustainable transportation solutions intensifies. Traditional railway systems face challenges in meeting the growing demand for reliable and fast transportation. In response, intelligent railway systems leverage advanced technologies such as artificial intelligence, IoT, and automation to optimize operations, enhance safety, and improve passenger experience.

Urban areas are becoming increasingly congested, leading to a surge in the need for smart and interconnected transportation solutions. IRTS addresses these challenges by offering real-time monitoring and control capabilities, predictive maintenance, and data-driven decision-making. The integration of intelligent systems in railway transport not only alleviates congestion but also contributes to the overall development of smart cities. Governments and transportation authorities worldwide are recognizing the potential of IRTS in managing the complexities of modern urban mobility, thus fostering the growth of the global market.

Emphasis on Safety and Security in Rail Transportation

Safety concerns have always been a critical aspect of the transportation sector, and the adoption of Intelligent Railway Transport Systems is driven by an increasing emphasis on enhancing safety and security. Traditional railway systems are susceptible to accidents, delays, and security breaches, prompting a shift towards intelligent solutions that can mitigate risks and ensure a secure travel environment.

IRTS incorporates advanced safety features such as real-time monitoring of train operations, automated signaling, collision avoidance systems, and predictive maintenance. The implementation of these technologies minimizes the likelihood of accidents and ensures the safety of passengers and railway staff. Additionally, intelligent railway systems contribute to the security of rail infrastructure by deploying surveillance systems, access control mechanisms, and threat detection technologies.

As governments and regulatory bodies worldwide prioritize safety in transportation, the demand for Intelligent Railway Transport Systems is expected to witness significant growth. The integration of cutting-edge technologies not only enhances safety but also builds public trust in the reliability and security of railway transportation.

Environmental Sustainability and Energy Efficiency

The global push towards environmental sustainability and energy efficiency is a compelling driver for the Intelligent Railway Transport System market. Traditional modes of transportation, including road and air, are associated with significant carbon emissions and environmental degradation. In this context, railways are considered a more sustainable and energy-efficient mode of transport.

Intelligent Railway Transport Systems leverage technology to further enhance

environmental sustainability. Features such as energy-efficient train operations, optimized route planning, and the use of eco-friendly materials contribute to reducing the carbon footprint of rail transportation. The integration of regenerative braking systems and smart energy management further enhances the energy efficiency of intelligent railway networks.

Governments and organizations worldwide are actively promoting sustainable transportation solutions to address climate change concerns. As a result, the adoption of IRTS aligns with these sustainability goals, driving the market forward. The combination of reduced environmental impact and energy efficiency positions Intelligent Railway Transport Systems as a key player in the global effort to build more eco-friendly transportation infrastructure.

Key Market Challenges

Infrastructure and Interoperability Hurdles

One of the primary challenges facing the Global Intelligent Railway Transport System (IRTS) market is the existing infrastructure and the interoperability issues associated with integrating intelligent technologies into traditional railway networks. Many rail systems worldwide have been in operation for decades, relying on legacy infrastructure that may not be inherently compatible with modern intelligent solutions. The process of retrofitting or upgrading existing infrastructure to accommodate new technologies poses a significant challenge.

The lack of standardization in communication protocols and technologies among different railway systems exacerbates interoperability challenges. Intelligent Railway Transport Systems often involve a multitude of components, including sensors, communication devices, and control systems, each potentially sourced from different vendors. Achieving seamless communication and data exchange between these diverse elements requires standardized protocols, which are often lacking in the current landscape.

Addressing these infrastructure and interoperability hurdles requires substantial investments, collaborative efforts among industry stakeholders, and a phased approach to system upgrades. Governments, railway operators, and technology providers must work together to establish common standards, ensuring that intelligent solutions can be smoothly integrated into existing railway networks without compromising safety or efficiency.

Cybersecurity Concerns in a Connected Environment

As Intelligent Railway Transport Systems become more interconnected and reliant on digital technologies, the vulnerability to cybersecurity threats becomes a significant challenge. The integration of sensors, communication networks, and control systems creates an expanded attack surface that malicious actors could exploit. Ensuring the cybersecurity of these systems is crucial for safeguarding passenger safety, preventing service disruptions, and protecting critical rail infrastructure.

The potential consequences of a cybersecurity breach in the IRTS are severe, ranging from unauthorized access to train control systems to disruptions in signaling and communication networks. As railways embrace digital transformation, it becomes imperative to implement robust cybersecurity measures to detect, prevent, and respond to cyber threats effectively.

Addressing cybersecurity concerns requires ongoing investment in cybersecurity infrastructure, employee training programs, and the adoption of best practices for secure software development. Collaboration between the railway industry and cybersecurity experts is essential to stay ahead of evolving threats and ensure the resilience of Intelligent Railway Transport Systems in the face of cyber challenges.

High Initial Implementation Costs and Return on Investment Uncertainty

Another significant challenge facing the global Intelligent Railway Transport System market is the high initial implementation costs associated with deploying advanced technologies. The integration of artificial intelligence, IoT devices, and automation into railway networks requires substantial upfront investments in hardware, software, and skilled personnel. The financial burden can be particularly challenging for rail operators, especially in regions with limited budgets for infrastructure upgrades.

The return on investment (ROI) for Intelligent Railway Transport Systems may not be immediately apparent, leading to uncertainty for stakeholders. While these systems offer long-term benefits such as improved operational efficiency, enhanced safety, and reduced environmental impact, the initial costs may deter some from embracing these transformative technologies.

To overcome this challenge, governments, industry players, and financial institutions must collaborate to develop funding models and incentives that support the adoption

of Intelligent Railway Transport Systems. Demonstrating the long-term economic and social benefits of these systems is crucial in convincing stakeholders to make the necessary initial investments. Additionally, technology providers can explore innovative pricing models and financing options to make intelligent solutions more accessible to a broader range of rail operators. This concerted effort is essential to overcoming the financial barriers and unlocking the full potential of Intelligent Railway Transport Systems on a global scale.

Key Market Trends

Integration of Artificial Intelligence for Predictive Maintenance and Operations Optimization

One prominent trend shaping the Global Intelligent Railway Transport System (IRTS) market is the increasing integration of artificial intelligence (AI) to enable predictive maintenance and optimize railway operations. Traditional railway maintenance practices often rely on predefined schedules, leading to both over-maintenance and unexpected breakdowns. The application of AI in the IRTS introduces a paradigm shift by allowing real-time monitoring of equipment health, predicting potential failures, and scheduling maintenance activities more efficiently.

AI algorithms analyze vast amounts of data collected from sensors placed on trains, tracks, and other critical components. These algorithms can detect anomalies, identify patterns, and predict potential issues before they escalate. Predictive maintenance not only reduces downtime and maintenance costs but also enhances the overall reliability and safety of railway operations.

AI plays a crucial role in optimizing train schedules, route planning, and resource allocation. By considering factors such as passenger demand, weather conditions, and equipment status, AI-driven systems can dynamically adjust schedules and routes, ensuring optimal efficiency and minimizing delays. The integration of AI in the IRTS market reflects a commitment to leveraging cutting-edge technologies for a more intelligent, responsive, and reliable railway transportation network.

Implementation of IoT for Enhanced Passenger Experience and Connectivity

Another significant trend in the Global Intelligent Railway Transport System market is the widespread implementation of the Internet of Things (IoT) to enhance the overall passenger experience and connectivity. The modern traveler expects seamless

connectivity, real-time information, and personalized services, and IoT technologies are instrumental in meeting these expectations within the railway sector.

IoT-enabled sensors and devices are deployed throughout railway infrastructure and onboard trains to collect and transmit data in real-time. Passengers can access information about train schedules, delays, and available services through mobile apps and digital displays. This not only improves the overall passenger experience but also helps travelers plan their journeys more effectively.

IoT facilitates the implementation of smart amenities within trains. Connected devices and sensors enable features such as automated climate control, predictive maintenance alerts, and even IoT-based ticketing systems. Passengers can enjoy a more comfortable and convenient journey with these smart features, while railway operators benefit from improved efficiency and cost savings.

IoT enhances safety and security in railway transport. Surveillance cameras, passenger counting sensors, and emergency response systems contribute to creating a secure environment for travelers. The implementation of IoT in the IRTS market aligns with the broader trend of creating smart, connected ecosystems within urban transportation infrastructure, meeting the evolving expectations of passengers and fostering a more efficient and enjoyable travel experience.

Segmental Insights

Devices & Components Insights

The Rail Sensors segment emerged as the dominated segment in 2023. The Rail Sensors segment is a critical component of the Global Intelligent Railway Transport System (IRTS) market, playing a pivotal role in transforming traditional railway networks into smart and efficient transportation systems. Rail sensors are specialized devices that capture and transmit data related to various aspects of railway operations, contributing to enhanced safety, efficiency, and maintenance practices.

Wheel Sensors monitor the rotation of train wheels, providing essential data for train control and signaling systems. They play a crucial role in detecting wheel slippage, wear and tear, and potential derailment risks. Axle counters utilize sensors to count the number of axles passing a specific point on the track. This technology is integral for accurate train detection, aiding in the optimization of traffic management and signaling.

Rail sensors significantly contribute to improving safety by continuously monitoring various parameters, allowing for real-time detection of anomalies or potential hazards. This is particularly critical in preventing accidents, derailments, and other safety-related incidents. The deployment of rail sensors facilitates the optimization of train schedules, route planning, and overall traffic management. By providing accurate and timely data on the condition of tracks and rolling stock, sensors enable railway operators to enhance operational efficiency and minimize delays.

The integration of advanced analytics and artificial intelligence with rail sensor data is a future trend. Predictive analytics can provide more accurate insights, allowing for proactive decision-making in maintenance and operations.

Regional Insights

Europe emerged as the dominated region in 2023, holding the largest market share. European countries have been proactive in investing in smart transportation initiatives. Governments and regulatory bodies are allocating significant funding for the development and implementation of Intelligent Railway Transport Systems, emphasizing the need for sustainable and efficient transportation solutions.

Europe has been working towards establishing interoperability standards to facilitate seamless integration of intelligent technologies across different railway networks. Initiatives like the European Rail Traffic Management System (ERTMS) aim to standardize control and command systems, signaling, and communication, promoting a unified and interconnected railway ecosystem.

Environmental sustainability is a priority in Europe, and the integration of Intelligent Railway Transport Systems aligns with efforts to reduce carbon emissions and promote eco-friendly transportation. The emphasis on energy-efficient operations, predictive maintenance, and optimized routes contributes to the region's commitment to sustainability.

Europe has been a pioneer in high-speed rail travel, and the integration of Intelligent Railway Transport Systems complements the development of high-speed rail networks. Advanced signaling systems, predictive maintenance, and real-time information services contribute to the efficiency and safety of high-speed rail operations.

Digitalization initiatives, including the deployment of sensors, IoT devices, and data analytics, are transforming rail operations in Europe. The digitalization of ticketing

systems, real-time monitoring of train conditions, and smart maintenance practices are becoming integral components of the region's intelligent railway networks.

The deployment of 5G networks and advancements in connectivity technologies are expected to play a pivotal role in enhancing communication within Intelligent Railway Transport Systems. High-speed and reliable connectivity will support real-time data exchange, enabling more responsive and efficient rail operations.

Future developments in the European IRTS market are likely to involve increased collaboration among stakeholders, including governments, railway operators, and technology providers. Standardization efforts will continue to streamline interoperability and ensure a cohesive approach to intelligent railway solutions.

Europe is witnessing a shift towards Mobility as a Service (MaaS) models, where integrated and seamless transportation experiences are provided to passengers. Intelligent Railway Transport Systems will play a crucial role in contributing to the broader MaaS ecosystem, ensuring connectivity and convenience for travelers.

Key Market Players

ABB Ltd.

Indra Sistemas, S.A.

Alstom SA

Alcatel-Lucent S.A.

Bombardier Inc.

Huawei Technologies Co. Ltd.

Hitachi, Ltd.

Cisco Systems, Inc.

Siemens AG

International Business Machines Corporation

Report Scope:

In this report, the Global Intelligent Railway Transport System Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Intelligent Railway Transport System Market, By Devices & Components:

Rail Sensors

Smart Cards

Video Surveillance Cameras

Intelligent Railway Transport System Market, By Solutions:

Passenger Information System (PIS)

Advanced Security Management System

Intelligent Railway Transport System Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Netherlands

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Thailand

Malaysia

South America

Brazil

Argentina

Colombia

Chile

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Intelligent Railway Transport System Market.

Available Customizations:

Global Intelligent Railway Transport System Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET

5. VOICE OF CUSTOMER

6. GLOBAL INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET OVERVIEW

7. GLOBAL INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Devices & Components (Rail Sensors, Smart Cards and Video Surveillance Cameras)

7.2.2. By Solutions (Passenger Information System (PIS) and Advanced Security Management System)

7.2.3. By Region (North America, Europe, South America, Middle East & Africa, Asia-Pacific)

7.3. By Company (2023)

7.4. Market Map

8. NORTH AMERICA INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Devices & Components

8.2.2. By Solutions

8.2.3. By Country

8.3. North America: Country Analysis

8.3.1. United States Intelligent Railway Transport System Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Devices & Components

8.3.1.2.2. By Solutions

8.3.2. Canada Intelligent Railway Transport System Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Devices & Components

8.3.2.2.2. By Solutions

8.3.3. Mexico Intelligent Railway Transport System Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Devices & Components

8.3.3.2.2. By Solutions

9. EUROPE INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Devices & Components

9.2.2. By Solutions

9.2.3. By Country

9.3. Europe: Country Analysis

9.3.1. Germany Intelligent Railway Transport System Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Devices & Components

9.3.1.2.2. By Solutions

9.3.2. France Intelligent Railway Transport System Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Devices & Components

9.3.2.2.2. By Solutions

9.3.3. United Kingdom Intelligent Railway Transport System Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Devices & Components

9.3.3.2.2. By Solutions

9.3.4. Italy Intelligent Railway Transport System Market Outlook

9.3.4.1. Market Size & Forecast

9.3.4.1.1. By Value

9.3.4.2. Market Share & Forecast

9.3.4.2.1. By Devices & Components

9.3.4.2.2. By Solutions

9.3.5. Spain Intelligent Railway Transport System Market Outlook

9.3.5.1. Market Size & Forecast

9.3.5.1.1. By Value

9.3.5.2. Market Share & Forecast

9.3.5.2.1. By Devices & Components

9.3.5.2.2. By Solutions

9.3.6. Netherlands Intelligent Railway Transport System Market Outlook

9.3.6.1. Market Size & Forecast

9.3.6.1.1. By Value

9.3.6.2. Market Share & Forecast

9.3.6.2.1. By Devices & Components

9.3.6.2.2. By Solutions

9.3.7. Belgium Intelligent Railway Transport System Market Outlook

9.3.7.1. Market Size & Forecast

9.3.7.1.1. By Value

9.3.7.2. Market Share & Forecast

9.3.7.2.1. By Devices & Components

9.3.7.2.2. By Solutions

10. SOUTH AMERICA INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Devices & Components

10.2.2. By Solutions

10.2.3. By Country

10.3. South America: Country Analysis

10.3.1. Brazil Intelligent Railway Transport System Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Devices & Components

10.3.1.2.2. By Solutions

10.3.2. Colombia Intelligent Railway Transport System Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Devices & Components

10.3.2.2.2. By Solutions

10.3.3. Argentina Intelligent Railway Transport System Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

- 10.3.3.2.1. By Devices & Components
- 10.3.3.2.2. By Solutions
- 10.3.4. Chile Intelligent Railway Transport System Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Devices & Components
 - 10.3.4.2.2. By Solutions

11. MIDDLE EAST & AFRICA INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET OUTLOOK

- 11.1. Market Size & Forecast
 - 11.1.1. By Value
- 11.2. Market Share & Forecast
 - 11.2.1. By Devices & Components
 - 11.2.2. By Solutions
 - 11.2.3. By Country
- 11.3. Middle East & Africa: Country Analysis
 - 11.3.1. Saudi Arabia Intelligent Railway Transport System Market Outlook
 - 11.3.1.1. Market Size & Forecast
 - 11.3.1.1.1. By Value
 - 11.3.1.2. Market Share & Forecast
 - 11.3.1.2.1. By Devices & Components
 - 11.3.1.2.2. By Solutions
 - 11.3.2. UAE Intelligent Railway Transport System Market Outlook
 - 11.3.2.1. Market Size & Forecast
 - 11.3.2.1.1. By Value
 - 11.3.2.2. Market Share & Forecast
 - 11.3.2.2.1. By Devices & Components
 - 11.3.2.2.2. By Solutions
 - 11.3.3. South Africa Intelligent Railway Transport System Market Outlook
 - 11.3.3.1. Market Size & Forecast
 - 11.3.3.1.1. By Value
 - 11.3.3.2. Market Share & Forecast
 - 11.3.3.2.1. By Devices & Components
 - 11.3.3.2.2. By Solutions
 - 11.3.4. Turkey Intelligent Railway Transport System Market Outlook
 - 11.3.4.1. Market Size & Forecast

- 11.3.4.1.1. By Value
- 11.3.4.2. Market Share & Forecast
 - 11.3.4.2.1. By Devices & Components
 - 11.3.4.2.2. By Solutions

12. ASIA-PACIFIC INTELLIGENT RAILWAY TRANSPORT SYSTEM MARKET OUTLOOK

- 12.1. Market Size & Forecast
 - 12.1.1. By Value
- 12.2. Market Share & Forecast
 - 12.2.1. By Devices & Components
 - 12.2.2. By Solutions
 - 12.2.3. By Country
- 12.3. Asia-Pacific: Country Analysis
 - 12.3.1. China Intelligent Railway Transport System Market Outlook
 - 12.3.1.1. Market Size & Forecast
 - 12.3.1.1.1. By Value
 - 12.3.1.2. Market Share & Forecast
 - 12.3.1.2.1. By Devices & Components
 - 12.3.1.2.2. By Solutions
 - 12.3.2. India Intelligent Railway Transport System Market Outlook
 - 12.3.2.1. Market Size & Forecast
 - 12.3.2.1.1. By Value
 - 12.3.2.2. Market Share & Forecast
 - 12.3.2.2.1. By Devices & Components
 - 12.3.2.2.2. By Solutions
 - 12.3.3. Japan Intelligent Railway Transport System Market Outlook
 - 12.3.3.1. Market Size & Forecast
 - 12.3.3.1.1. By Value
 - 12.3.3.2. Market Share & Forecast
 - 12.3.3.2.1. By Devices & Components
 - 12.3.3.2.2. By Solutions
 - 12.3.4. South Korea Intelligent Railway Transport System Market Outlook
 - 12.3.4.1. Market Size & Forecast
 - 12.3.4.1.1. By Value
 - 12.3.4.2. Market Share & Forecast
 - 12.3.4.2.1. By Devices & Components
 - 12.3.4.2.2. By Solutions

12.3.5. Australia Intelligent Railway Transport System Market Outlook

12.3.5.1. Market Size & Forecast

12.3.5.1.1. By Value

12.3.5.2. Market Share & Forecast

12.3.5.2.1. By Devices & Components

12.3.5.2.2. By Solutions

12.3.6. Thailand Intelligent Railway Transport System Market Outlook

12.3.6.1. Market Size & Forecast

12.3.6.1.1. By Value

12.3.6.2. Market Share & Forecast

12.3.6.2.1. By Devices & Components

12.3.6.2.2. By Solutions

12.3.7. Malaysia Intelligent Railway Transport System Market Outlook

12.3.7.1. Market Size & Forecast

12.3.7.1.1. By Value

12.3.7.2. Market Share & Forecast

12.3.7.2.1. By Devices & Components

12.3.7.2.2. By Solutions

13. MARKET DYNAMICS

13.1. Drivers

13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

15.1. ABB Ltd.

15.1.1. Business Overview

15.1.2. Key Revenue and Financials

15.1.3. Recent Developments

15.1.4. Key Personnel/Key Contact Person

15.1.5. Key Product/Services Offered

15.2. Indra Sistemas, S.A.

15.2.1. Business Overview

15.2.2. Key Revenue and Financials

15.2.3. Recent Developments

15.2.4. Key Personnel/Key Contact Person

- 15.2.5. Key Product/Services Offered
- 15.3. Alstom SA
 - 15.3.1. Business Overview
 - 15.3.2. Key Revenue and Financials
 - 15.3.3. Recent Developments
 - 15.3.4. Key Personnel/Key Contact Person
 - 15.3.5. Key Product/Services Offered
- 15.4. Alcatel-Lucent S.A.
 - 15.4.1. Business Overview
 - 15.4.2. Key Revenue and Financials
 - 15.4.3. Recent Developments
 - 15.4.4. Key Personnel/Key Contact Person
 - 15.4.5. Key Product/Services Offered
- 15.5. Bombardier Inc.
 - 15.5.1. Business Overview
 - 15.5.2. Key Revenue and Financials
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel/Key Contact Person
 - 15.5.5. Key Product/Services Offered
- 15.6. Huawei Technologies Co. Ltd.
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel/Key Contact Person
 - 15.6.5. Key Product/Services Offered
- 15.7. Hitachi, Ltd.
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel/Key Contact Person
 - 15.7.5. Key Product/Services Offered
- 15.8. Cisco Systems, Inc.
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel/Key Contact Person
 - 15.8.5. Key Product/Services Offered
- 15.9. Siemens AG
 - 15.9.1. Business Overview

15.9.2. Key Revenue and Financials

15.9.3. Recent Developments

15.9.4. Key Personnel/Key Contact Person

15.9.5. Key Product/Services Offered

15.10. International Business Machines Corporation

15.10.1. Business Overview

15.10.2. Key Revenue and Financials

15.10.3. Recent Developments

15.10.4. Key Personnel/Key Contact Person

15.10.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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