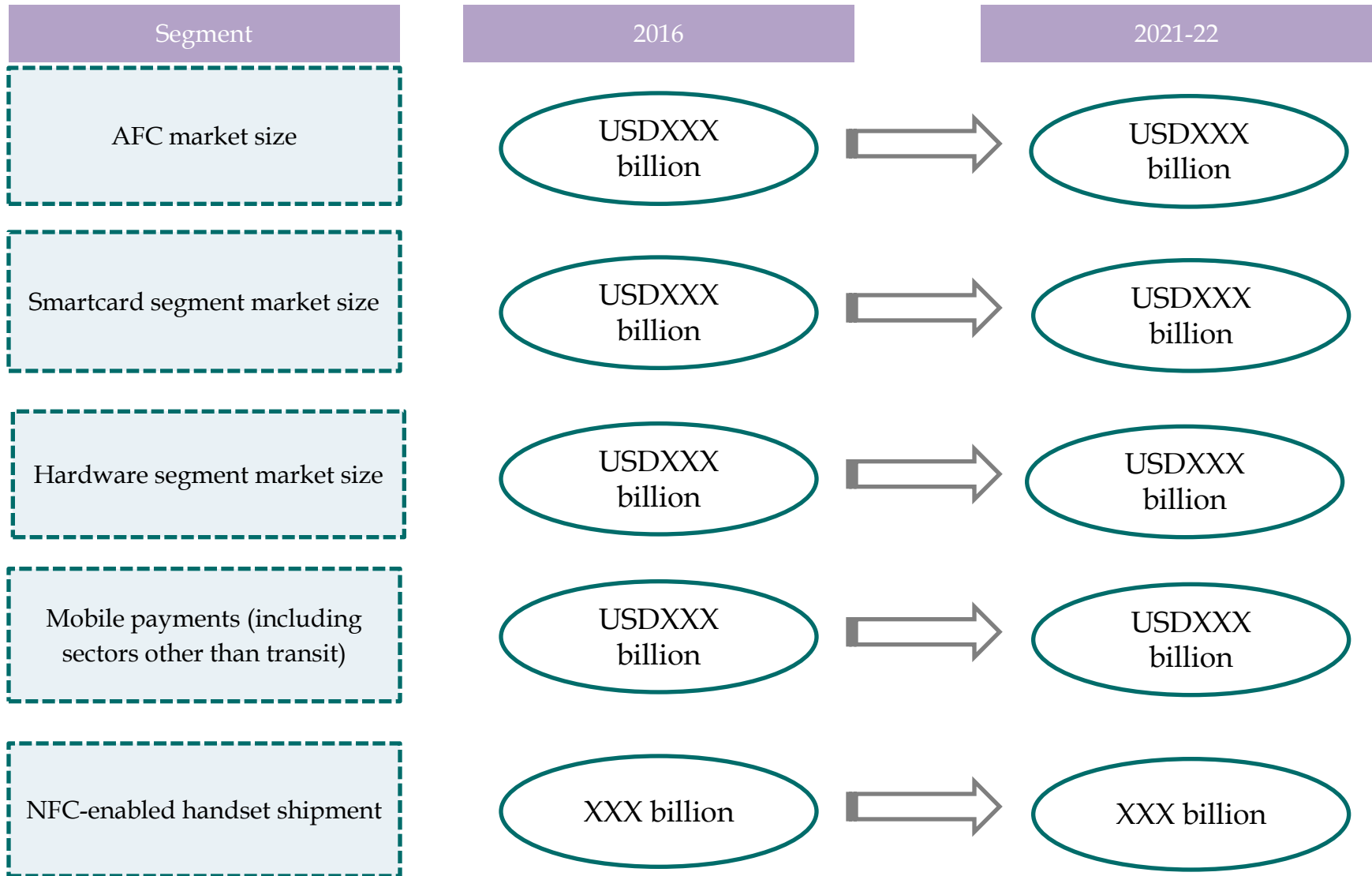


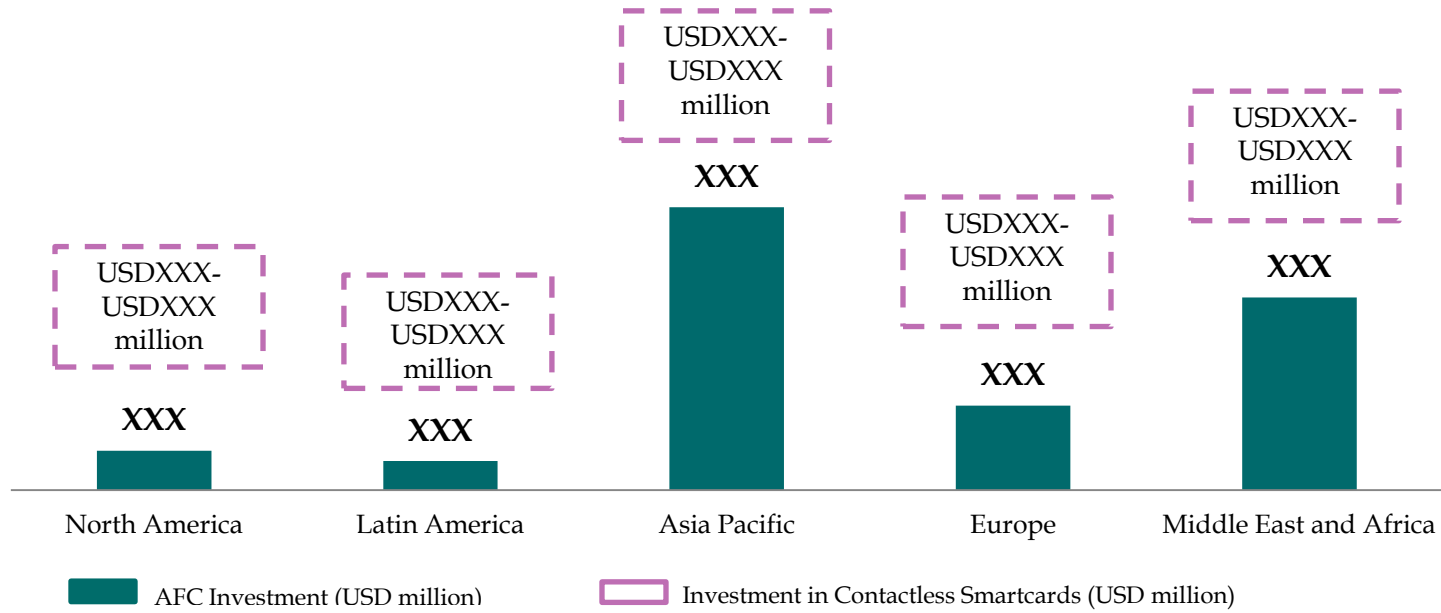
### 1.1.2 Market Size



### 1.3.2 Market Outlook (2/4)

*Global Mass Transit Research estimates that the upcoming XXX urban rail projects across the world present an opportunity of nearly USDXXX billion for the fare systems industry by 2030 (as part of new systems/lines that are coming up).*

#### Region-wise AFC investment in upcoming rail projects (USD million)



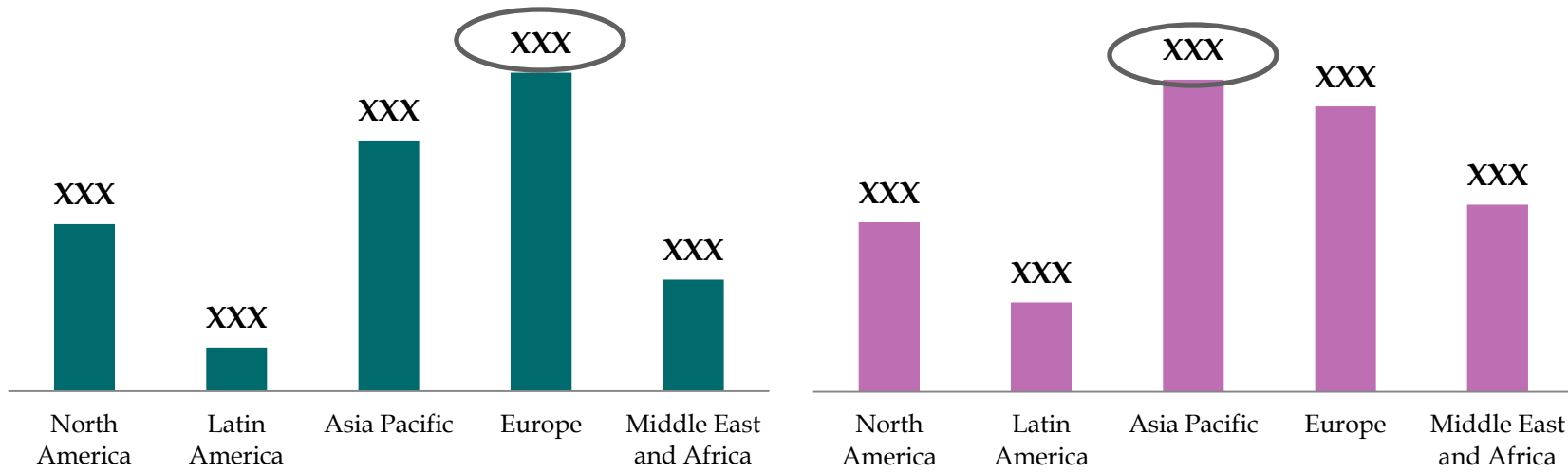
#### Key takeaway

- ✓XXX offers the maximum opportunity as it has the highest number of upcoming urban rail projects owing to the developments in XXX and XXX.
- ✓XXX follows next as cities in the region are now focusing on the development of public transit systems and moving away from the use of private vehicles.

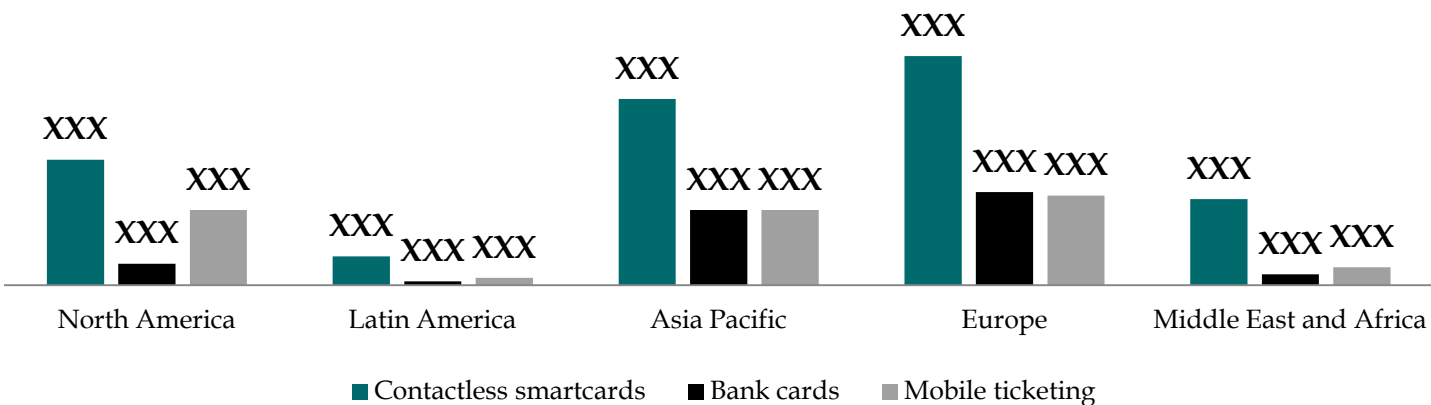
### 1.3.3 Plans for Deployment of Advanced Fare Media

Region-wise no. of cities with plans to deploy AFC

Region-wise no. of cities with contracts to be awarded

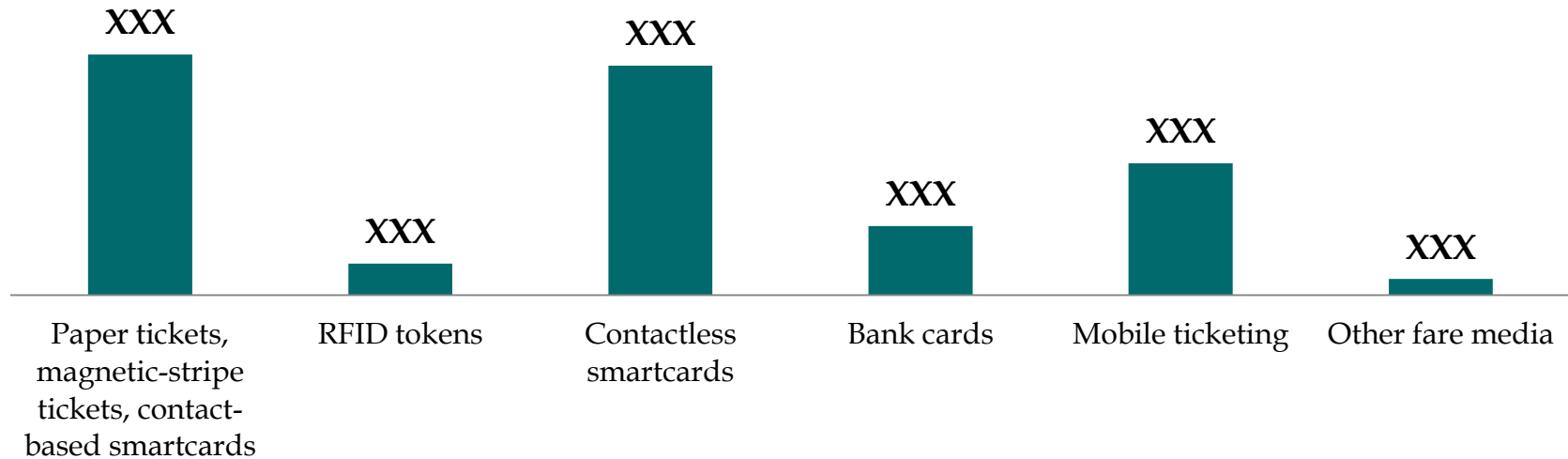


Region-wise no. of cities with plans to deploy contactless smartcards, bank cards and mobile ticketing



## 2.1.7 Comparative Analysis of Alternative Fare Media (1/3)

### No. of cities deploying different fare media



### Key takeaways

- ✓ Of the total XXX cities covered in the report, paper tickets, magnetic-stripe tickets and contact-based smartcards altogether are deployed in XXX cities, followed by contactless smartcards, which are deployed in XXX cities.
- ✓ Mobile-ticketing for fare collection is slowly picking up pace and is deployed in around XXX cities. Bank cards are used to collect fares in XXX cities.
- ✓ RFID-tokens are slowly phasing out and are used in only XXX cities. Deployment of other fare media such as key chains, rings, wristbands etc. is yet to pick up pace.

### 2.2.3 Ticketing for Multiple Modes, Single Operator

Region	Country	Cities	No. of cities
North America	Canada	XXX, XXX, XXX, XXX	4
	United States	XXX, XXX, XXX,...	XXX



- ✓ A single operator for multiple modes simplifies the fare management process. It allows seamless connectivity for transfer and convenience of using a common fare media across modes.
- ✓ Out XXX cities covered in the report, only XXX cities have single agency operating the fare system of multiple modes of public transport.
- ✓ Around XXX cities in North America and XXX in Europe have single operator managing the ticketing for multiple modes.
- ✓ No cities in XXX, XXX, and XXX fall in this category, and hence, have a fragmented fare system, with different modes operated by different operators.

Region	Country	Cities	No. of cities
Europe	Austria	XXX	XXX
	XXX	XXX	XXX
	Croatia	XXX	XXX
	XXX	XXX	XXX
	XXXX	XXX	XXX
	Georgia	XXX	XXX
	XXX	XXX	XXX
	Latvia	XXX	XXX
	XXX	XXX	XXX
	Slovakia	XXX	XXX

## 2.3.2 Latin America: Opportunities (2/2)

### Cities with plans for AFC procurement in Latin America

Opportunity	Number of cities
Contactless smartcards	XXX
Bank cards	XXX
Mobile ticketing	XXX
Fare media integration	XXX
Deployment of AFC (contactless smartcards, bank cards, mobile ticketing)	XXX

#### Key takeaways

- ✓ *Global Mass Transit Research* analyzed opportunities in XXX cities in the region. Of these, XXX cities have plans to deploy AFC systems (including contactless smartcards, bank cards, mobile ticketing)
- ✓ There is emphasis on fare system integration in the region. A total of XXX cities have plans for integration – either between all modes or with value-added services.
- ✓ XXX cities have plans to introduce contactless smartcards or will deploy existing contactless smartcards on upcoming new public transit systems and expansions.
- ✓ Only XXX cities have plans to introduce mobile ticketing.

Contracts for deployment of advanced fare system are yet to be awarded in XXX cities.