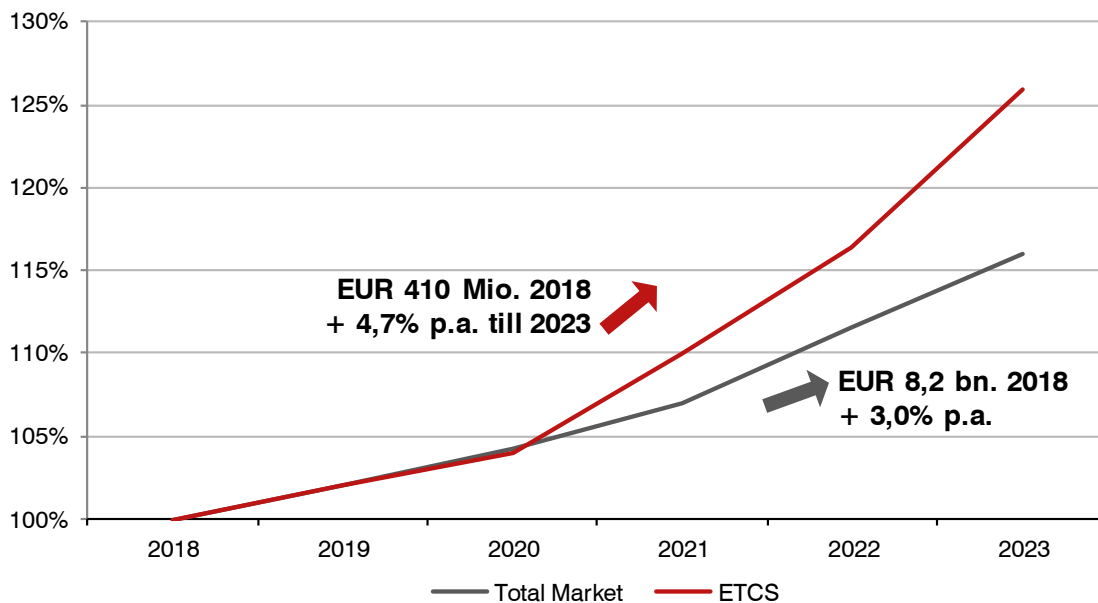


ETCS technology close to a breakthrough regarding comprehensive utilisation –the European market for control command and signalling will grow significantly over the next years

New study on the market for control command and signalling

[06.06.2019] The train control system ETCS (European Train Control System), cornerstone of digitalising and automatising the railway system, is noticeably gaining in importance. Approval of extensions in many European countries as well as the provision of necessary funding lead to dynamic growth of the market for signalling technology. In its latest study „Control Command and Signalling - Worldwide Market Trends 2019“, SCI Verkehr shows accelerated growth of the ETCS market in particular between 2018 and 2023, presenting an average development of almost +5% p.a..

Development of the control command and signalling market in Europe, indicated [%, Index 2018]



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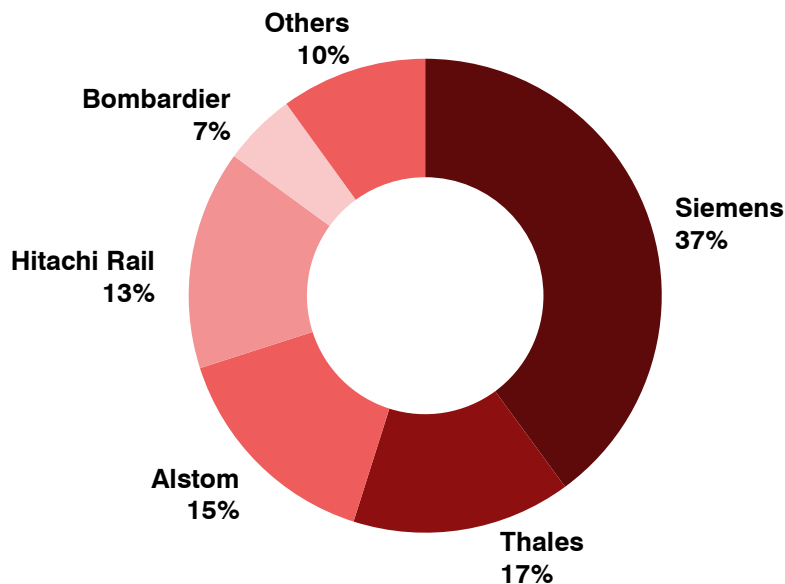
Impetus from individual countries on the market development varies considerably. Germany has only fitted less than 100 km of internationally significant routes so far and approved funds only cover equipment of routes in cross-border areas (ca. 250km in total). Besides this, Deutsche Bahn plans to invest about EUR 570 million until 2023 – according to estimations of the German government, about one billion euros p.a. are necessary in order to equip the entire system with ETCS. Smaller states are far more developed in this respect: Denmark (ca. EUR 700 million), Norway (ca. EUR 800 million) and Belgium (ca. EUR 500 million) have already deposited projects and concrete investments for their goals (until

2030). The decision of larger network operators on similar comprehensive implementation can further drive the identified market development significantly in the future.

On the other hand, the willingness of the railways and their owners to make necessary sustainable investments and to promote the introduction of the ETCS system with effort and determination are essential prerequisites for the forecast long-term growth, which clearly goes beyond the period under consideration in this study.

In addition to the railways themselves, manufacturers of European signalling technology and their suppliers will benefit from the upcoming investments.

Market share (Europe) for new and upgrade projects in control command and signalling 2014-2018 [%]



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Siemens, as largest supplier in the European market, was able to strengthen its position ahead of European and international competitors in the past years. With more than 35% market share, it is well ahead its competitors Thales, Alstom, Hitachi Rail and Bombardier. However, given its huge domestic market of EUR 2.5 billion in 2018, the largest manufacturer for signalling technology is the Chinese state-owned enterprise CRRC (China Railway Signal & Communication). With a market share of 23%, the company ranks first, regardless of the fact that less than 5% of its revenue is achieved on international markets. Therefore, European players in the control command and signalling market do not have to fear competition from China at the moment.

As of now, the MultiClient study „[Control Command and Signalling - Worldwide Market Trends 2019](#)“ is available (in English) from SCI Verkehr GmbH (www.sci.de). Also get



informed regarding our latest offer in form of the [data annex in excel format](#) which is available since 2017 for all of our published studies.

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