ITS Exports
Study
November 2023

Developed by Intelligent Transport Systems UK (ITS UK) in
partnership with the Transport Technology Forum

Intelligent
Transport Systems UK
Empowering Transport Technology

TRANSPORT
TECHNOLOGY
FORUM

Contents

Foreword

Steve Gooding CB,
Chair, Transport Technology Forum
Director, RAC Foundation

As chair of the Transport Technology Forum I'm very conscious that our mission is not only to broker a more effective, joined-up relationship between the transport tech developers and suppliers and their potential highway authority customers in the UK but also to help them build on their success in this country as a platform for securing further success in export markets – if the tech works here, with the many and various transport challenges we face across the country, there's a fighting chance that it will help address similar challenges elsewhere.

Not all traffic and transport challenges are the same – different places have different issues to address, reflecting the historic development of their road, rail and bus networks and the economic and social drivers of traffic movements – just as different companies offer different solutions and specialisms.

That is where this report comes in – by setting out clearly the global potential for their services as perceived by the tech developers themselves as a resource that can in turn inform how best to tailor our export support activity.

Rather that adopting a blanket approach this report will help identify which countries, which markets, and which issues offer the most fertile prospects for UK businesses, a 'go-to' reference, so that our necessarily limited resources can be targeted to best – well-informed – effect, just as the sector aims to tailor the solutions it provides.

Just as I look forward to seeing how ITS UK develops its own Export Support Programme so I look forward to hearing the experience and, hopefully, the success stories from UK transport technology players at TTF events – in addition to export earnings in hard cash there's also scope for us to benefit from export learnings from successful applications overseas that could offer insights applicable to our own networks. The potential for a 'win-win' is there – let's make it happen.

Max Sugarman
Chief Executive,
Intelligent Transport
Systems UK

[1] Made in the UK, Sold to the World: New strategy to boost exports to £1 trillion, Department for International Trade
[2] Intelligent Transportation System Global Market Report 2022: Sector to Reach $51.29 Billion by 2030 at a 7.7% CAGR, Business Wire

INTRODUCTION

Transport technology can play a leading role in a Global Britain

Often, when we think of 'transport' our mind focuses on a frequent journey we take, whether for work or leisure.

We think of the bus we recently caught, the car drive, a ride on a bicycle or e-Scooter, a walk or a train journey. Rarely, however, do the public consider the wider industry behind the transport system – and the considerable jobs, investment and economic growth that industry provides.

When it comes to the intelligent transport sector, the UK has a great story to tell. Whether in connected and autonomous vehicle development, smart ticketing, the application of data, AI and machine learning to the transport network, traffic management, enforcement and more – the UK has world-leading businesses of all sizes on its shores. We are trialling the latest technology, coming up with novel applications to support seamless travel and delivering new tools to better manage the network. As a sector, the ITS industry provides a key asset for UK plc; one that we can leverage to boost trade abroad.

The Government has an ambitious target to grow UK exports, as part of its 'Global Britain' vision. In 2021, the then-Department for International Trade launched the 'Race to a Trillion', seeking to boost the level of exports from £600 billion to a trillion by the end of the decade. The intelligent transport sector has a key role to play in achieving this goal – and with the global ITS industry expected to grow to $51.29 billion by 2030, with a compound annual growth rate of 7.7%, now is the time to get started.

But, in order for government and industry to better support companies in selling abroad, it first needs to understand their priority overseas markets, the barriers to trade they face and what can be done to overcome them. This ITS Exports Study, developed by Intelligent Transport Systems UK in partnership with the Transport Technology Forum, seeks to do just that. In the following report, we set out the views of over 100 businesses in the ITS sector, providing insight into why they currently export, or why they may not, where their priority markets are and what government and industry can do, working together, to support them.

Going forward, this Study will be actively used by both by industry and government to support the sector, helping us understand where to prioritise our work and how we can deliver for UK companies looking to export more. This Study is very much the start of the journey – one we very much look forward to taking with you.

Executive Summary

The Study surveyed over 100 UK businesses across the ITS sector on their exporting experience and priorities going forward.

These companies range in size, with 38% classifying themselves as Micro, 19% as Small, 11% as Medium sized and 30% as Large. Of these companies, 61% said they were currently exporters, with 34% saying they weren't. 5% said they were a new exporter. A large majority – 55% - said they were looking to export more going forward.

The Study seeks to provide an estimate to the size of the sector. 42 organisations gave us their annual exports revenue, with at total combined exports revenue of £175 million. On average, each company generated an annual exports revenue of £4,178,000. And on average, each company generated around 26% of their annual total revenue from exporting.

When asked which countries these organisations currently export to, the top five (in order) were the US, Australia, Ireland, Canada and New Zealand. Asked for their priority markets, the respondents highlighted (in order) the United States, Australia, Germany, France and the Netherlands as the top five countries.

Respondents were more optimistic about their own international growth prospects than they were about the general industry's, although the majority were positive about both their own and the wider sector's outlook. When asked how optimistic they were about their own business, 69% gave a rating of three or higher (with five being the most optimistic). In comparison, 60% gave a rating of three or higher when asked about the industry's international growth prospects. Asked if government and industry are providing the right level of support for the UK ITS market in exporting overseas, the majority – 57% said they could be doing more.

When asked what would help businesses most in terms of exports the key three asks were greater promotion of UK industry to overseas partners, simpler trade rules and reduced tariffs.

Next Steps

ITS UK will be using the ITS Exports Study to develop its Export Support Programme for members over 2024. If you would like to find out more or see how to get involved, please email **contact@its-uk.org**

Study results
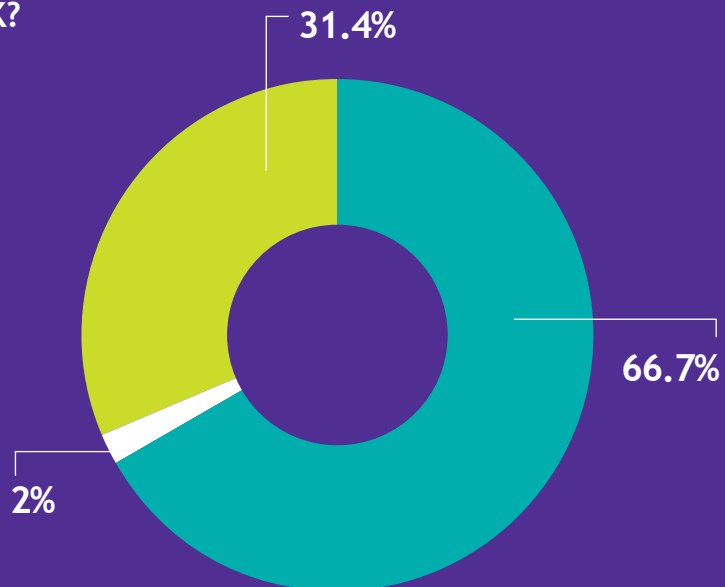
A. The Respondents

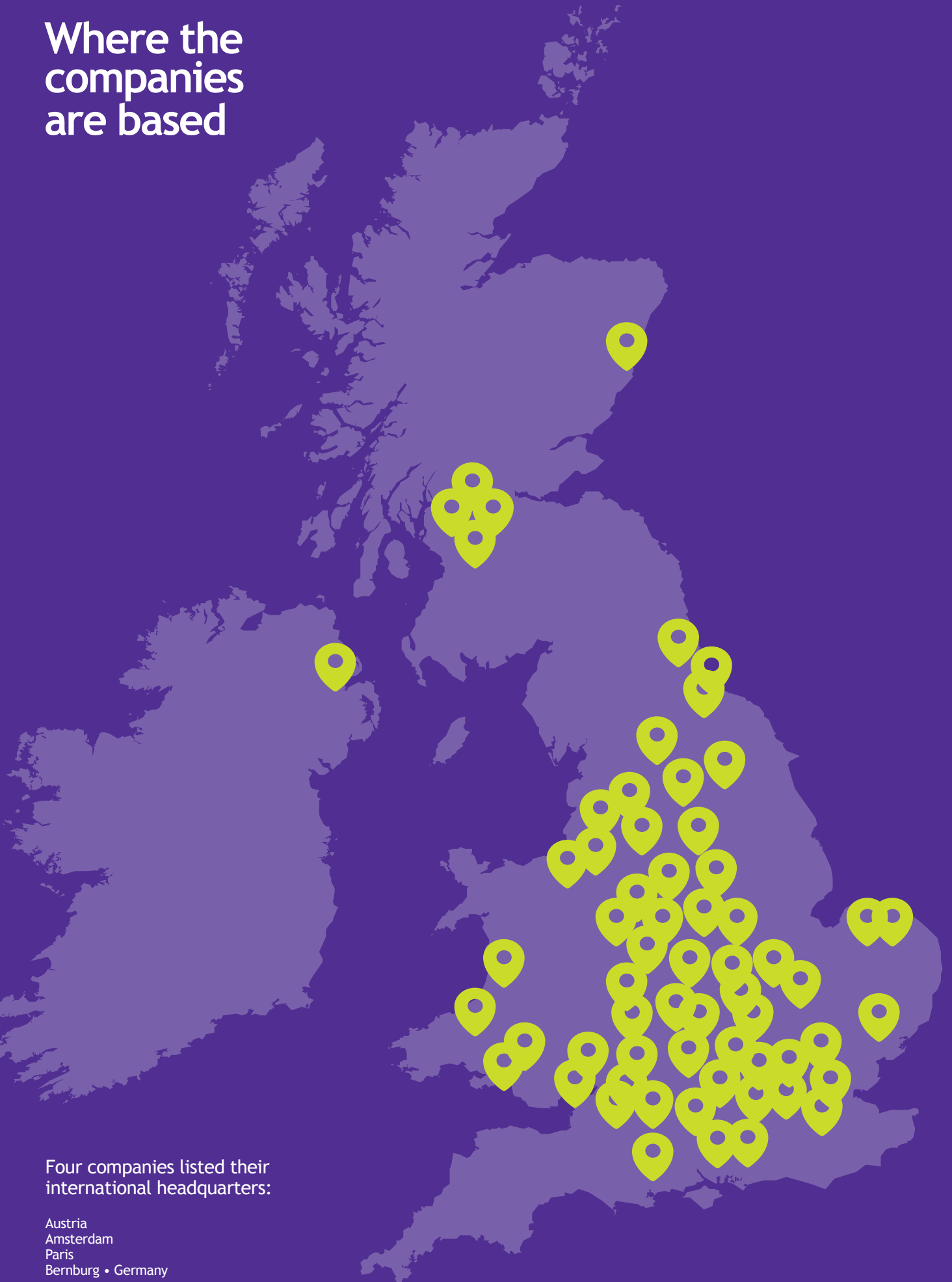**102 companies responded to the survey.**

Where they are based:
Is you organisation based in the UK?

- Yes
- No
- Multi-national with a UK base

31.4%

66.7%

2%

Where the companies are based

Four companies listed their international headquarters:

Austria
Amsterdam
Paris
Bernburg • Germany

CASE STUDY

Solar Road studs for rural roads between Banská Bystrica region and Michalovce, Central Slovakia, Clearview Intelligence

Clearview Intelligence supported by their partner Mabelema in Slovakia, successfully installed 3000+ active solar road studs including snow plough housing throughout 2022.

The project initiatives were to improve road safety on over 250km of rural roads in the Banská Bystrica region in central Slovakia. A testament to the success was the procurement of a further 3,769 in 2023 and early discussion for a third phase in 2024.

The Clearview intelligence SolarLite F has drawn worldwide attention since its first inception in the 90's. The continued innovation by Clearview to develop the product has made the stud a competitive solution for improving road safety and enhancing driver experience, making drivers feel safer and more able to drive at night.

What is the product?

Clearview Intelligence, active solar road studs allow drivers to see the road layout 900 meters ahead, which is ten times further than traditional reflective studs. Independent studies have shown that where solar studs have been installed, the number of night-time accidents has fallen by 70%.

Solar road studs not only deliver road safety – they're key in the battle against climate change too. Because they are solar-powered, they are a zero-emission alternative to streetlighting, they deliver carbon savings of nearly nine tonnes of CO_2 per mile per year compared to the most energy-efficient LED lamps.

Solar Road studs in Slovakia at night

Size of the companies

What is the size of your company?

Responses: 102

Company size	%
Micro (turnover up to £2m)	38.2
Small (turnover up to £10m)	18.6
Medium (turnover £10m to £50m)	10.8
Large (turnover over £50m)	30.4
Don't know	2
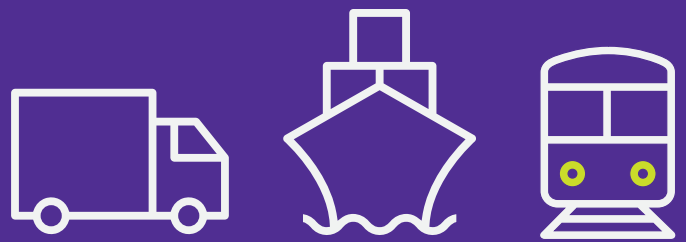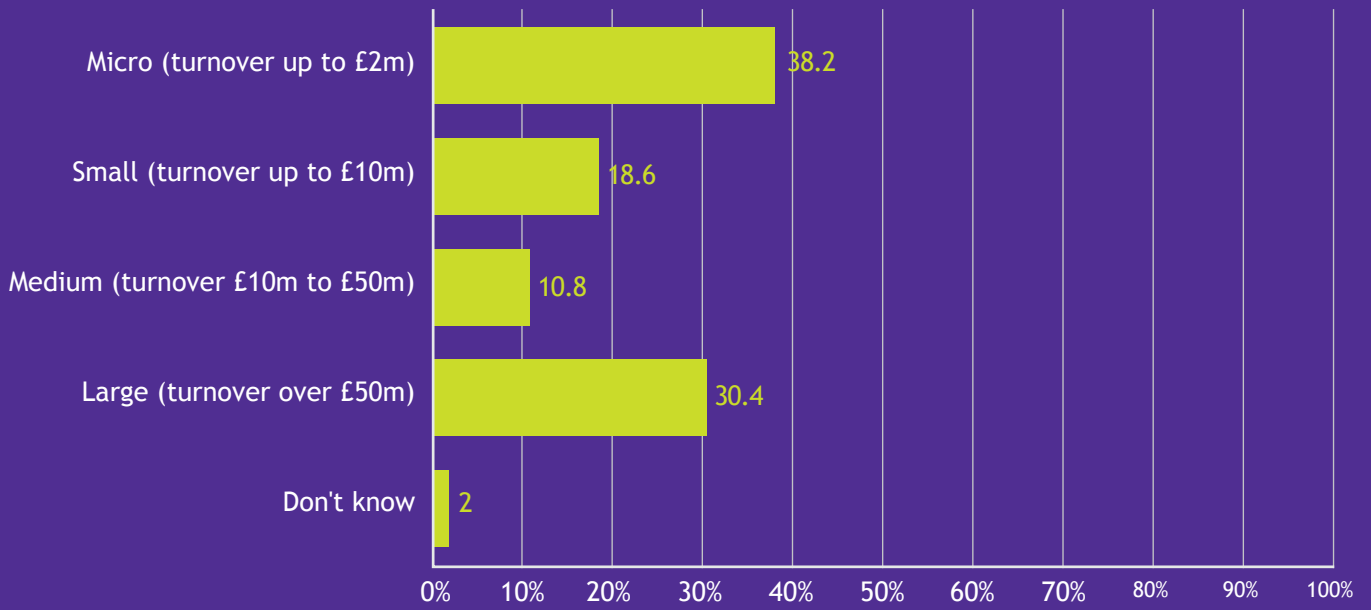
Markets

Respondents were asked to pick the markets they operated in and were allowed to select multiple options. Figures are percentages.

Other sectors included (Verbatims)
- MaaS/Mobility Technology Platform
- Investment Bank with sector coverage of TMT (Technology, Media, Telecom)
- Bicycle Manufacturer
- EV Infrastructure/electric mobility (2)

Traffic management and UTMC
58.82

Data analysis
53.92

Consultancy
53.92

Enforcement and road safety
44.12

Central and Local Government
43.14

Communications technologies
38.24

Cooperative systems and autonomous vehicles
33.33

Vehicle and pedestrian detection
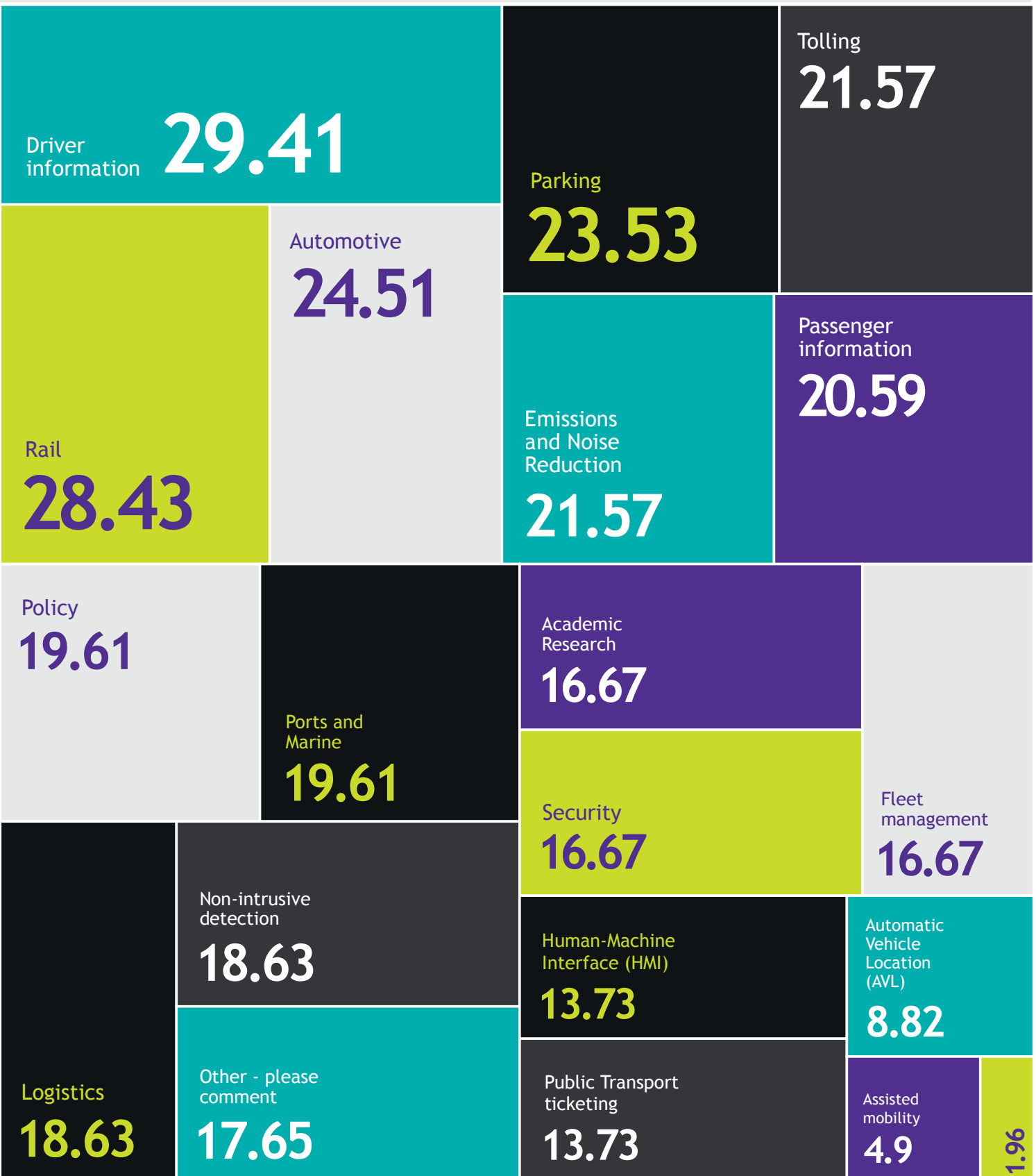## 33.33

- Mapping highway condition and asset registers
- All things meteorological
- Software
- Connected Vehicles (2)

- Maritime Solutions, Complex Systems
- Highways, Construction, Asset surveys
- Electric mobility
- Traffic Management

- Training | Product Assessment
- Work Zone and Road Space Booking
- Mapping highway condition and asset registers

Driver information
29.41

Automotive
24.51

Rail
28.43

Policy
19.61

Ports and Marine
19.61

Tolling
21.57

Parking
23.53

Emissions and Noise Reduction
21.57

Passenger information
20.59

Academic Research
16.67

Security
16.67

Fleet management
16.67

Non-intrusive detection
18.63

Human-Machine Interface (HMI)
13.73

Automatic Vehicle Location (AVL)
8.82

Logistics
18.63

Other - please comment
17.65

Public Transport ticketing
13.73

Assisted mobility
4.9

Recruitment/project resourcing/executive
1.96

# B. Current Exporting Experience

What best describes your organisation?

Responses: 94

- Experienced exporter
- Reasonably experienced exporter
- Reasonably new exporter
- New exporter
- Not an exporter

New exporter
5.3%

Reasonably
new exporter
12.8%

Not an exporter
34%

Experienced
exporter
18%

Reasonably
experienced exporter
29.8%
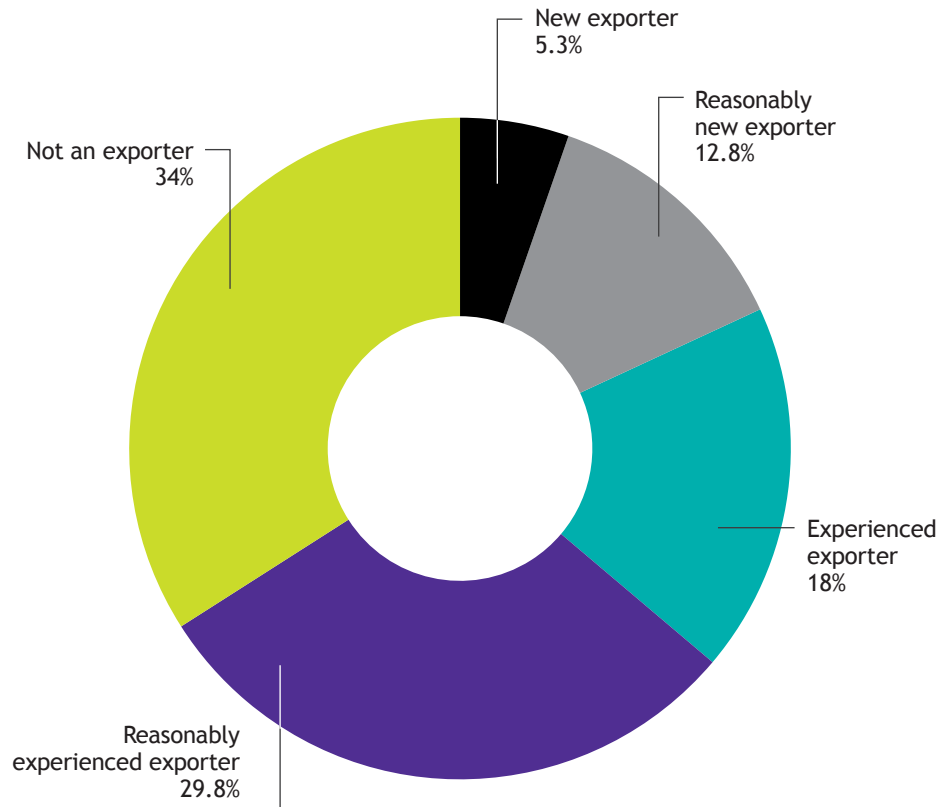
What best describes your organisation's view of exporting?

Responses: 94

- Looking to export more
- Happy with how much we export currently
- Looking to export less
- Don't export, but looking to start
- Don't export and not looking to start
- Other

Looking to
export less
1.1%

Don't export, but
looking to start
7.5%

Happy with how
much we export
currently
8.5%

Don't
export and
not looking
to start
13.8%

Other
13.8%

Looking to
export more
55.3%
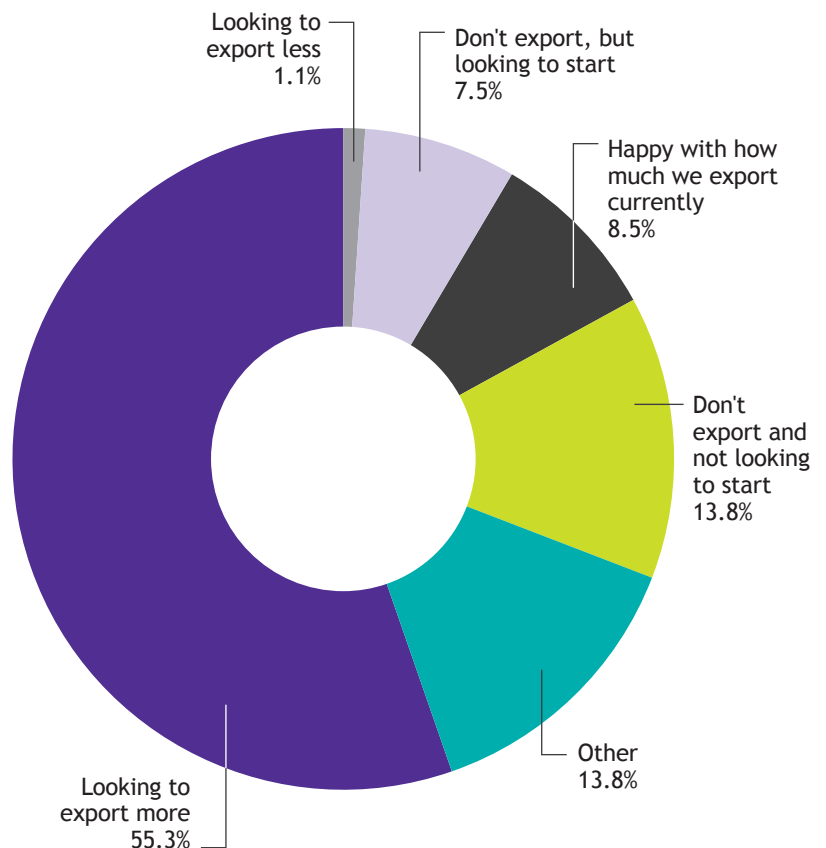
Value of Exports

42

organisations gave us their annual exports revenue, with at total combined exports revenue of

£175 million

On average, each company generated an annual exports revenue of

£4,178,000

On average, each company generated around

26%

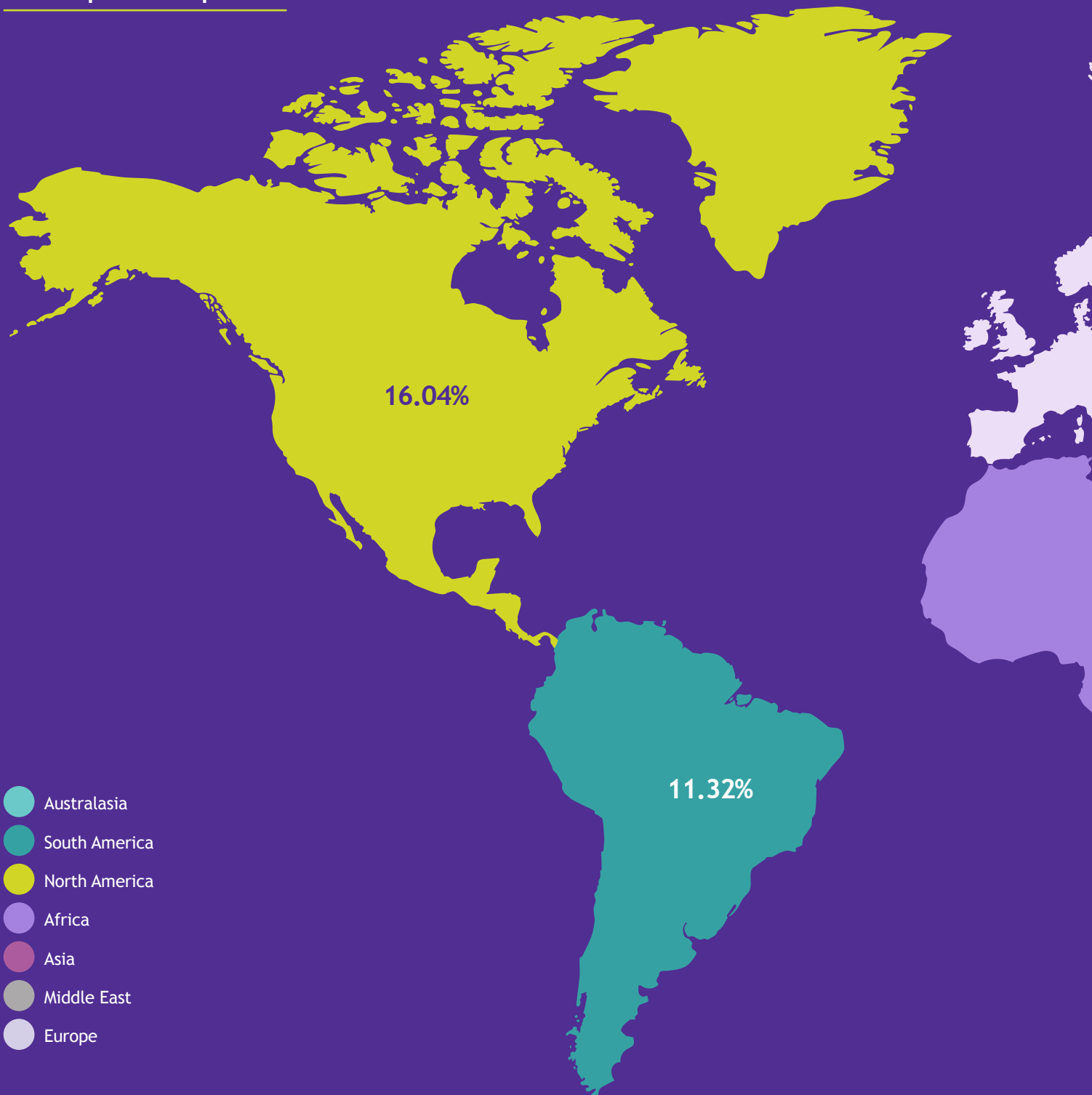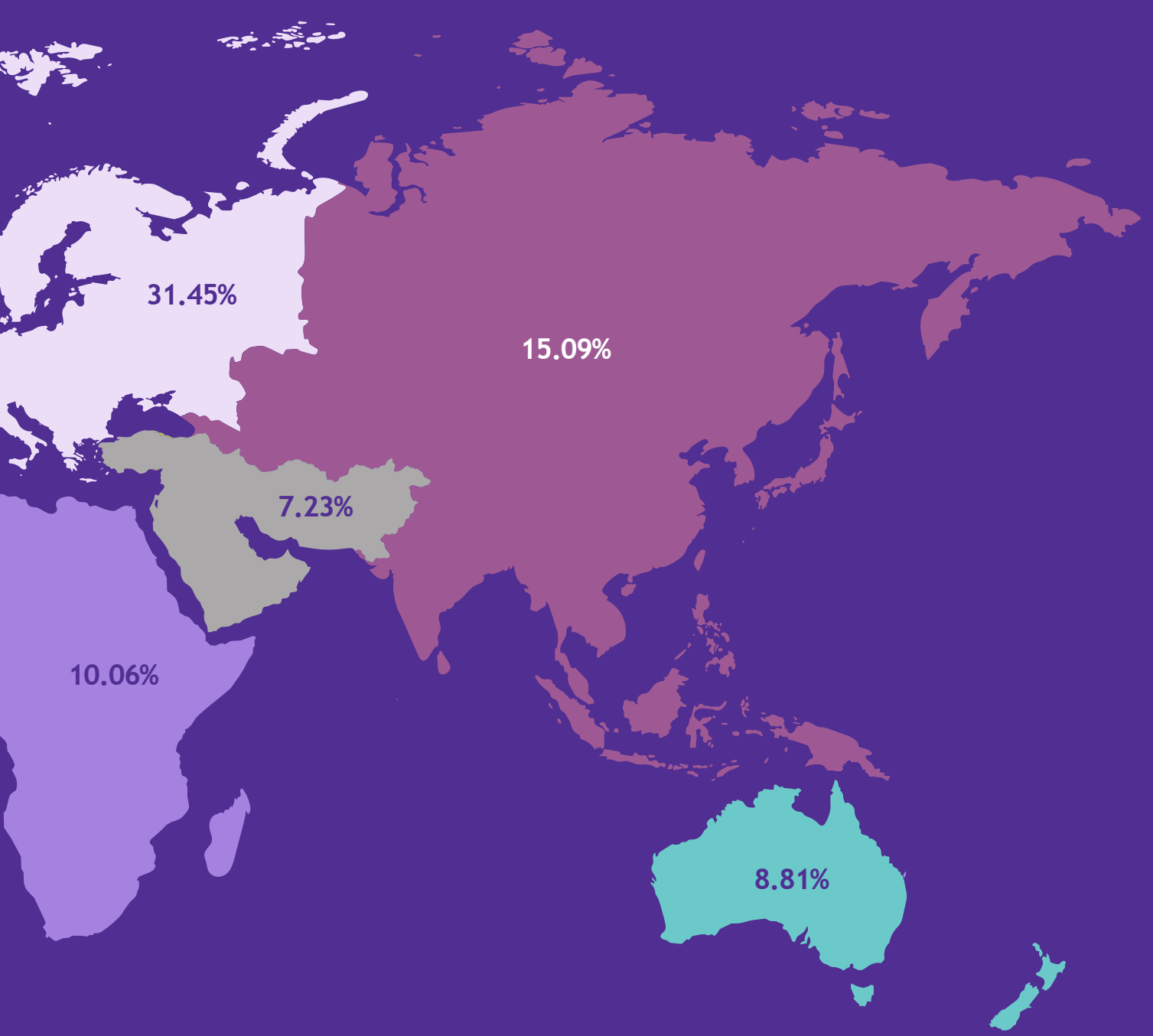of their annual total revenue from exporting.

Where the companies currently export to?
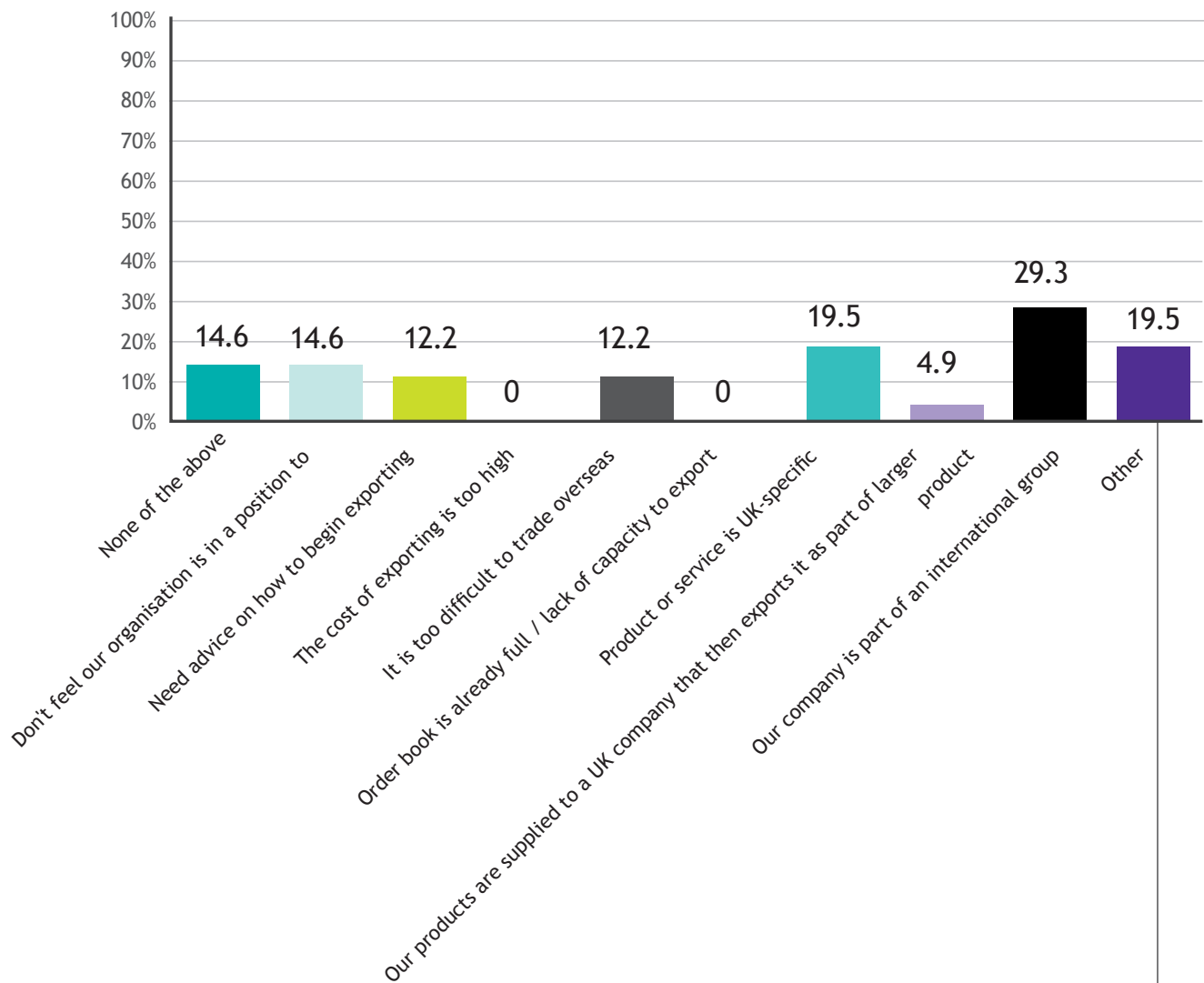
55 companies responded

16.04%

11.32%

- Australasia
- South America
- North America
- Africa
- Asia
- Middle East
- Europe

31.45%

15.09%

7.23%

10.06%

8.81%

If you do NOT currently export, what is the reason?

Responses: 41

Chart data:
- None of the above: 14.6
- Don't feel our organisation is in a position to: 14.6
- Need advice on how to begin exporting: 12.2
- The cost of exporting is too high: 0
- It is too difficult to trade overseas: 12.2
- Order book is already full / lack of capacity to export: 0
- Product or service is UK-specific: 19.5
- Our products are supplied to a UK company that then exports it as part of larger product: 4.9
- Our company is part of an international group: 29.3
- Other: 19.5

Some comments included in 'other'

- UK focused organisation
- Our business model is to provide international manufacturers access to the UK infrastructure market
- Limited interest so far

C. Priority markets

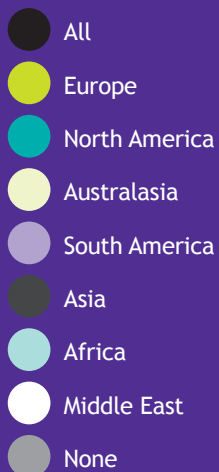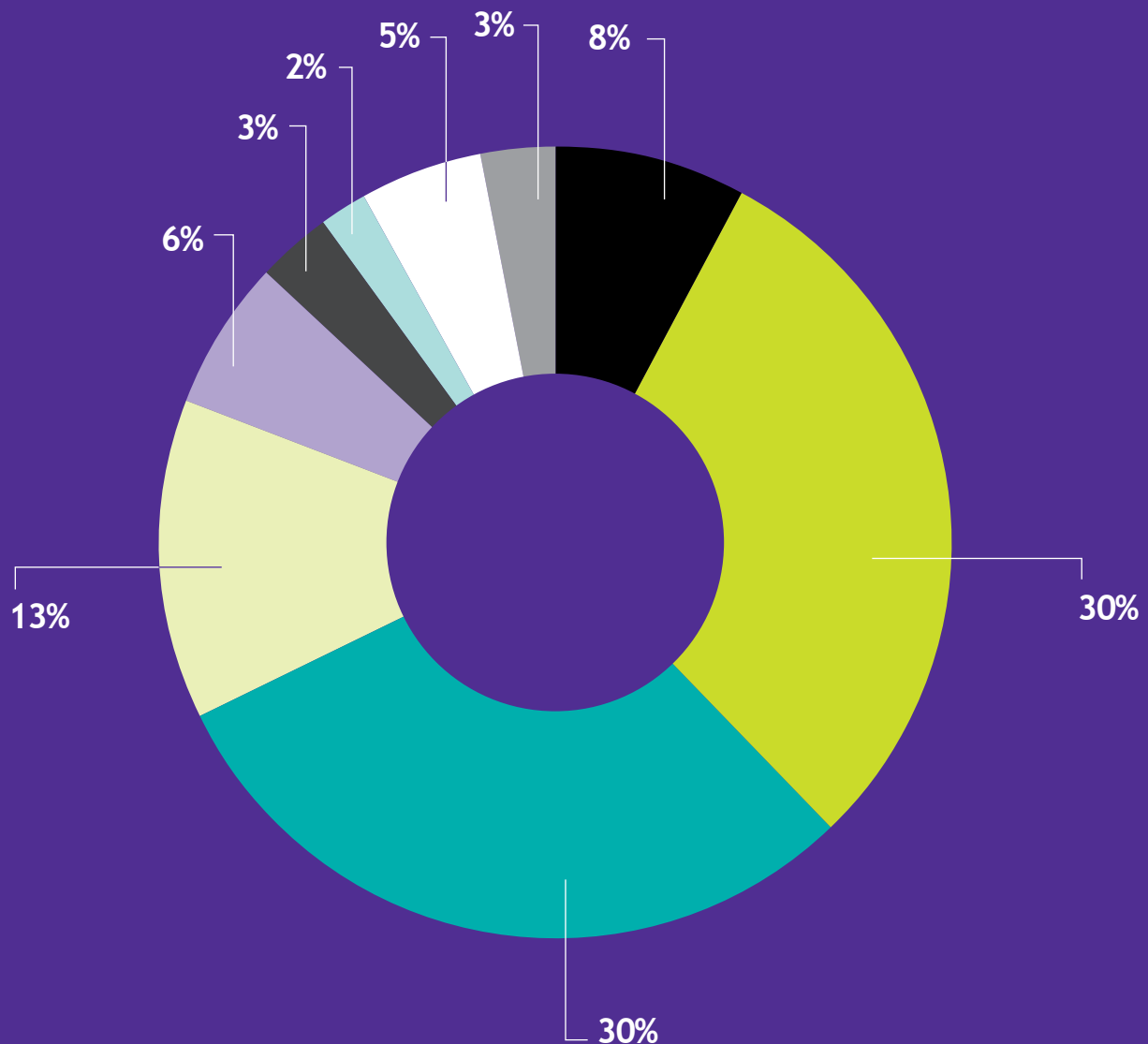| Answer Choices	Highest Priority Market	Second Priority Market	Third Priority Market	Fourth Priority Market	Fifth Priority Market	Total priorities from all five in order (out of 500%)
United States of America	41.18%	8.06%	6.25%	7.89%	6.45%	69.83%
Australia	7.35%	12.90%	4.17%	7.89%	3.23%	35.54%
Germany	1.47%	11.29%	8.33%	5.26%	6.45%	32.81%
France	8.82%	4.84%	6.25%	7.89%	3.23%	31.03%
Netherlands	4.41%	3.23%	6.25%	7.89%	3.23%	25.01%
Canada	0.00%	11.29%	6.25%	2.63%	3.23%	23.40%
Ireland	8.82%	6.45%	2.08%	2.63%	3.23%	23.21%
Spain	0.00%	3.23%	2.08%	10.53%	3.23%	19.07%
United Arab Emirates	4.41%	6.45%	4.17%	0.00%	3.23%	18.26%
Belgium	2.94%	1.61%	0.00%	0.00%	12.90%	17.45%
China	4.41%	4.84%	0.00%	0.00%	3.23%	12.48%
New Zealand	2.94%	0.00%	6.25%	0.00%	3.23%	12.42%
Sweden	1.47%	0.00%	6.25%	2.63%	0.00%	10.35%
Finland	1.47%	1.61%	0.00%	0.00%	6.45%	9.53%
Saudi Arabia	0.00%	3.23%	6.25%	0.00%	0.00%	9.48%
India	2.94%	1.61%	2.08%	2.63%	0.00%	9.26%
Chile	0.00%	0.00%	0.00%	5.26%	3.23%	8.49%
Norway	2.94%	0.00%	2.08%	0.00%	3.23%	8.25%
Italy	0.00%	1.61%	0.00%	0.00%	6.45%	8.06%
Brazil	0.00%	0.00%	2.08%	2.63%	3.23%	7.94%
Respondents	68	62	48	38	31	500.02%

See full table in appendix

In which markets would help from ITS UK and/or the Government be beneficial?

(Please list as many as you wish)

Responses: 48

30%

30%

13%

6%

3%

2%

5%

3%

8%

Legend:

- All
- Europe
- North America
- Australasia
- South America
- Asia
- Africa
- Middle East
- None

**Some respondents listed sectors, including:**
- Airports, stadiums, train stations
- Rail
- SMEs

CASE STUDY

LIMA EXPRESSA, Valerann

The partnership between Valerann, a provider of ATMS solutions, and LIMA EXPRESA, a subsidiary of VINCI Highways and the concessionaire of Vía de Evitamiento and the Línea Amarilla express road, stands as a remarkable example of how technology is significantly improving road safety and traffic management.

Faced with the challenges of increasing traffic, rising road incidents, and data fatigue, this collaboration leveraged the power of artificial intelligence to empower control centres, achieving transformative results.
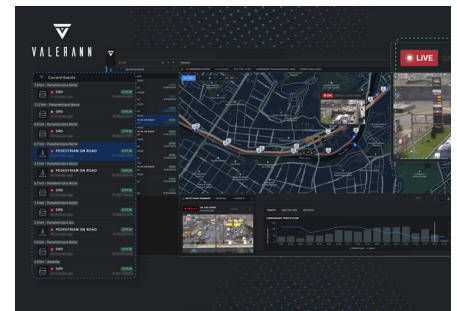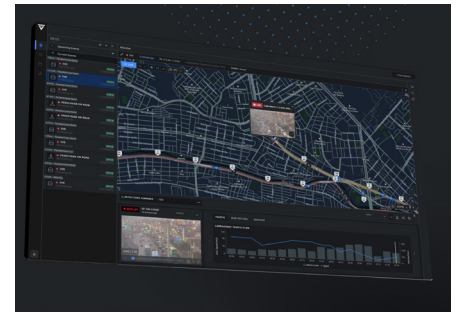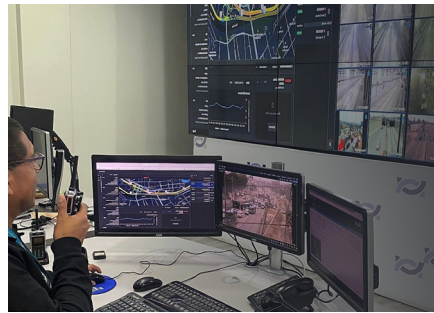
Lanternn by Valerann™ (LbV) an advanced analytics and AI software platform

The Challenge

The Vía de Evitamiento and the Línea Amarilla express roads are vital for the 10 million inhabitants of the Peruvian capital. Serving as primary connectors between key transport hubs, these arteries help to alleviate congestion in the historic centre of Lima while offering a 30-min reduction in journey times for their users. However, with the growing traffic currently standing at 200,000 vehicles per day, it is expected that the total number of road events in 2023 will reach 14,000, — a sharp 17% rise from 12,000 in 2022. This trend over past years showed an increased need for leveraging technology in traffic monitoring and management, especially for incidents detection.

The Initiative

In 2021, LIMA EXPRESA's initiative to deploy an innovative automatic

incidents detection system received co-financing from the Ministry of Production in Peru. To accomplish their goal, LIMA EXPRESA partnered with Valerann, global leader in advanced traffic monitoring solutions (ATMS). Lanternn by Valerann™ (LbV) is an advanced analytics and AI software platform that integrates with the existing road infrastructure, ingests and continuously processes data streams from all available disparate sources, such as cameras, connected vehicles, loops, radars, crowdsourcing applications, satellites. By deriving data from unrelated sources, leveraging sophisticated AI and computer vision algorithms, the solution delivers best in class data fusion. This removes road authorities' reliance on manual events verification and provides them with accurate real-time information on the exact location, type, cause, and severity of incidents – on a single pane of glass.

The Outcome

Using Lanternn by Valerann™, the LIMA EXPRESA team significantly reduced incident response time, increased road safety and improved resource management. Enabling complete monitoring coverage, the solution proved to detect over 95% of all road incidents in under five minutes. Further enhancing road safety, the system facilitated preventative measures for road accidents management by detecting pedestrians and stopped vehicles in potentially dangerous zones, along with conducting predictive analysis to foresee high-risk events.

D.Future Outlook

How optimistic are you about your businesses' international growth prospects in 2023?

Fair
2

Good
3

Poor
1

Very Good
4

15%

37%

18%

Very poor
0

9%

Excellent
5

7%

15%

Rating

Responses: 82
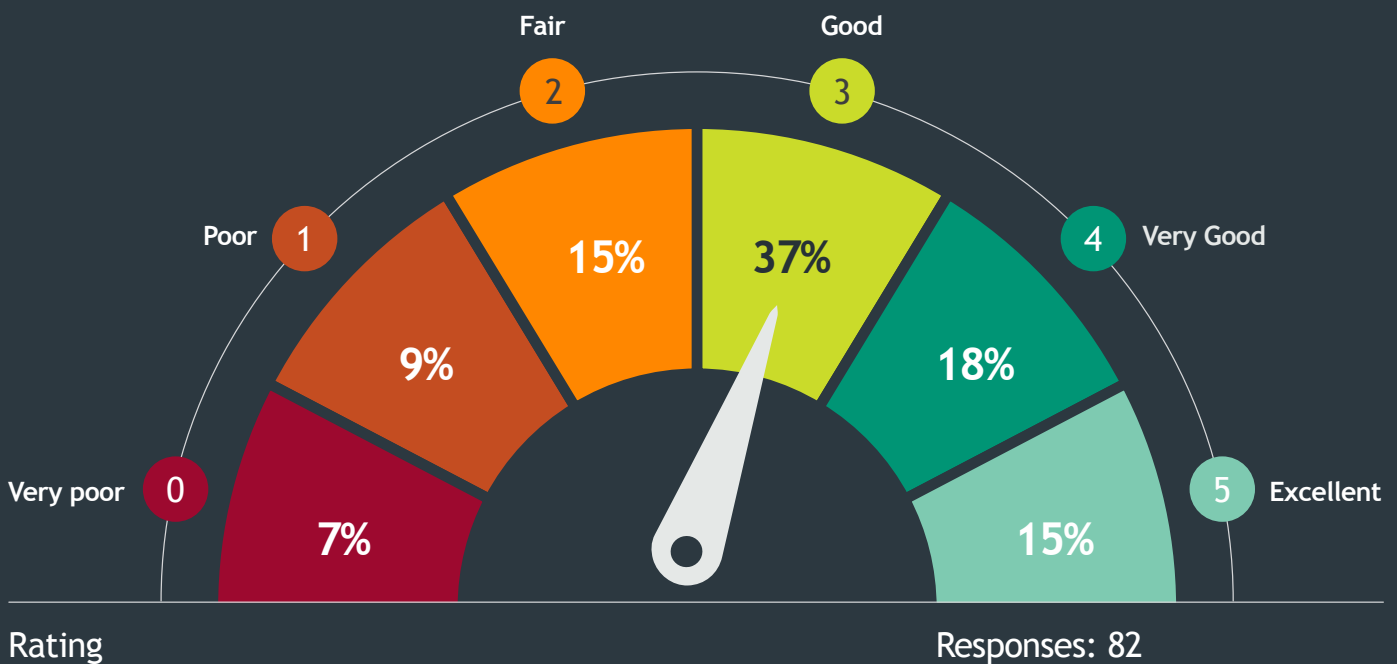
How optimistic are you about the UK ITS market's international growth prospects in 2023?

Fair
2

Good
3

Poor **1**

4 Very Good

24%

34%

12%

18%

Very poor **0**

5 Excellent

2%

9%

Rating

Responses: 82

E. Support from Government and industry
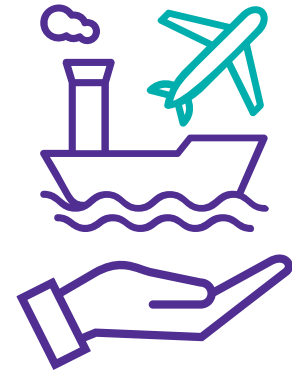
Is Government & industry providing the right level of support for the UK ITS market in exporting overseas?

Responses: 82

Other
(please specify)
13.41%

Yes, we are getting the right
level of support
9.76%

Could be
doing more
57.32%

No, we need
more support
19.51%
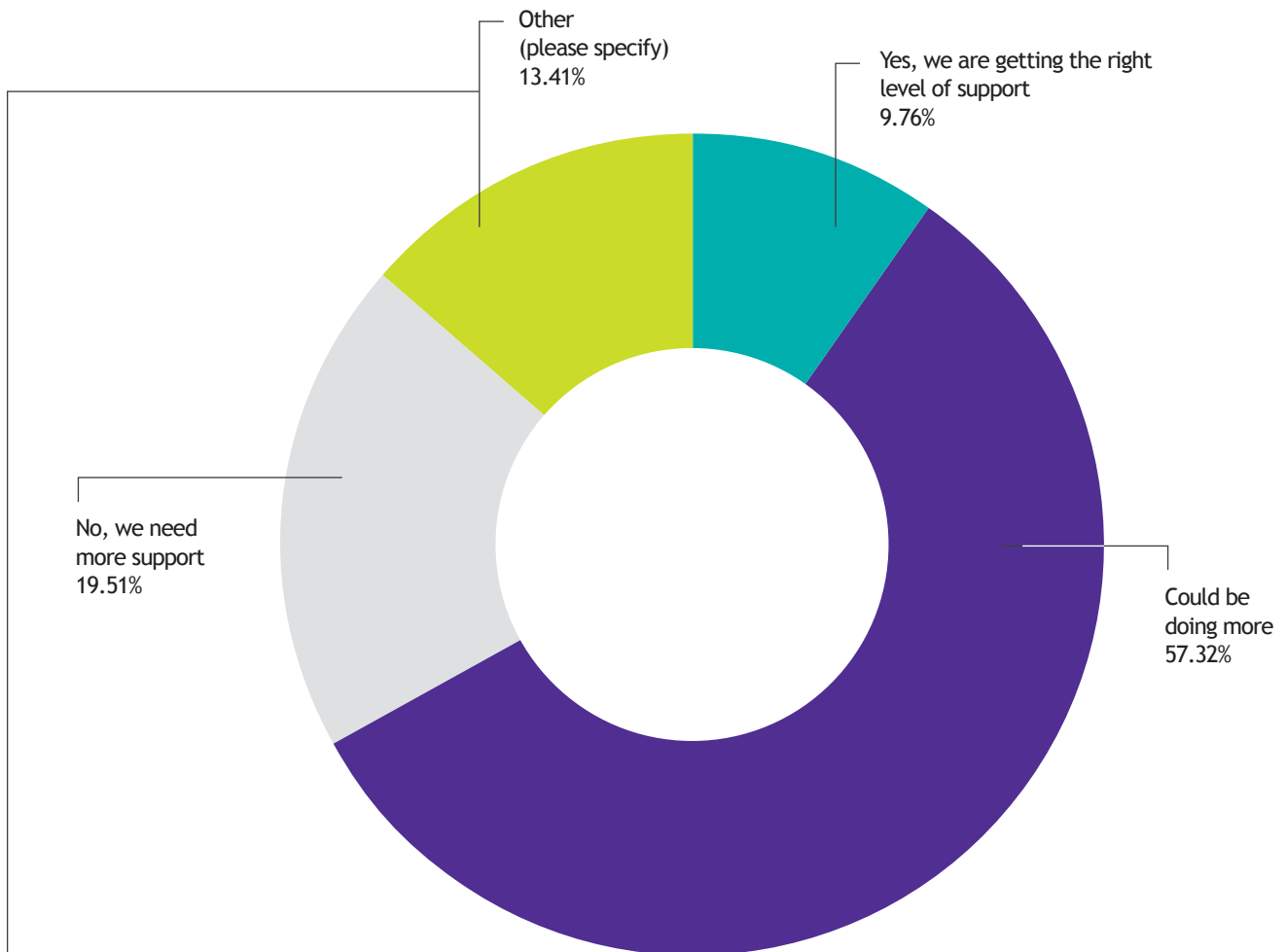
Other comments included:

- "We need to break into the ITS market in the UK"
- "Currently providing no relevant support"
- "The world is facing more and more common ITS issues UK
  often is a leader and fails to capitalise on our initial advantage"

Please rank what would help your business most in terms of exports

Ranking

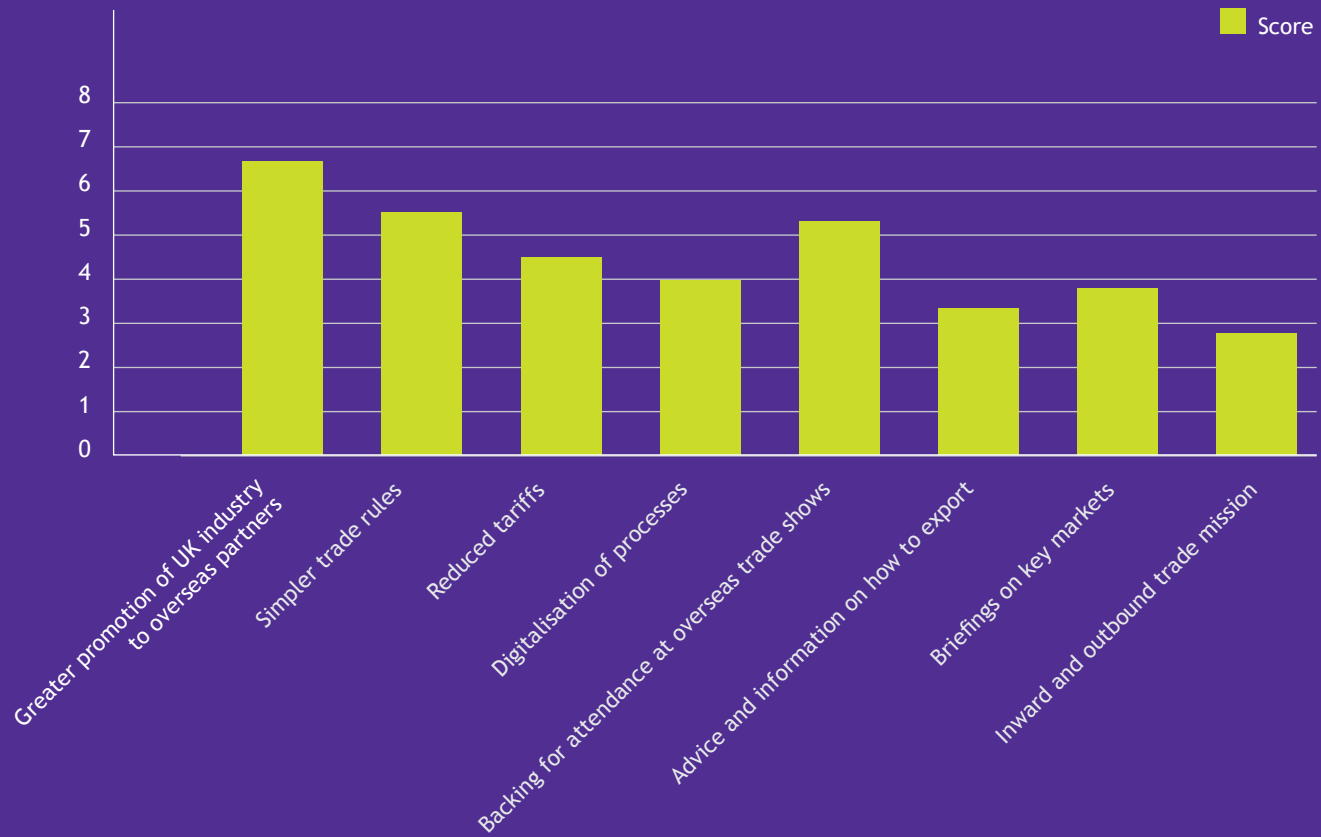| Answer Choices	First Response (% and Number)		Second Response (% and Number)		Third Response (% and Number)		Fourth Response (% and Number)		Fifth Response (% and Number)		Sixth Response (% and Number)		Seventh Response (% and Number)		Eighth Response (% and Number)		Score
Greater promotion of UK industry to overseas partners	53.73%	36	11.94%	8	13.43%	9	10.45%	7	2.99%	2	4.48%	3	2.99%	2	0.00%	0	6.78
Simpler trade rules	20.90%	14	14.93%	10	22.39%	15	4.48%	3	17.91%	12	10.45%	7	8.96%	6	0.00%	0	5.49
Reduced tariffs	2.99%	2	19.40%	13	11.94%	8	16.42%	11	8.96%	6	22.39%	15	7.46%	5	10.45%	7	4.42
Digitalisation of processes	1.49%	1	10.45%	7	11.94%	8	19.40%	13	11.94%	8	16.42%	11	16.42%	11	11.94%	8	3.96
Backing for attendance at overseas trade shows	10.45%	7	20.90%	14	14.93%	10	13.43%	9	22.39%	15	10.45%	7	4.48%	3	2.99%	2	5.19
Advice and information on how to export	1.49%	1	7.46%	5	11.94%	8	4.48%	3	22.39%	15	19.40%	13	19.40%	13	13.43%	9	3.58
Briefings on key markets	7.46%	5	7.46%	5	8.96%	6	17.91%	12	4.48%	3	8.96%	6	31.34%	21	13.43%	9	3.76
Inward and outbound trade missions	1.49%	1	7.46%	5	4.48%	3	13.43%	9	8.96%	6	7.46%	5	8.96%	6	47.76%	32	2.82

Responses: 67

Are there any areas where you'd like specific support to export, either from Government or industry?

A defined strategy that links to the UKs leading position in a range of digital mobility areas such as ride hailing, taxis, rail ticket distribution etc.

Support to meet with key officials at global institutions such as World Bank, IFC, etc who are commissioning consultancy for electric and connected strategy and policy making.

Visibility and support for international tenders, perhaps helping UK companies to partner with ITS companies in respective markets for a collaborative application

Approval in some countries is by state or region rather than at a national level meaning processes of approval are duplicated many times e.g. Australia

Introductions to other government funded transportation bodies that are seeking UK railway consultancy services to invest in improving their rail and transportation systems

DBT doing a great job supporting us

Better visibility of ITS UK at the international level. Please arrange more trade delegations visits to exchange expertise.

Trading into the EU has now become more challenging (importing and exporting) - anything that can be done to reduce the complications would be most welcome

Consortium formation to win business together

Helping accessing local authorities / councils in other countries

Collaborate with branding and promotion of public transport in other countries

Bi lateral trade agreements are useful

A Government funded vision / blueprint is required detailing the UK ITS sector export offering. It should be concise and demonstrate the UK skills /services /products vs a global ITS and Future Mobility market.

Protecting IP and contractual arrangements.

Need to participate in European projects / schemes. e.g. EETS, EUCARIS

Buy our products for UK use as it makes it easier to sell overseas

Additional comments on the ITS exports industry

Finding the right person in Government to speak with. Having access to consular knowledge and networks in country.

Lets stop navel gazing and start promoting our fantastic ITS sector and industry.

Recently attended a trade mission from Mongolia to UK with support from UKEF. I would like to see more of these opportunities from developing countries that wish to invest in their infrastructure.

Staffing resource often prevents us from attending lots of international events

Exporting is not of #1 priority, but we retain an open mind as to what may happen in the future.

As a subsidiary entity we do not export from the UK apart from services into Ireland which has become far more complicated but still manageable - this drains resources and is unwelcome.

Like it or loath it the impact of Brexit has to be seen as an opportunity for UK / ITS export market.

Does the ITS sector understand the market opportunities now the UK isn't saddled with EU trade constraints? Is Government sufficiently briefed / aware of the ITS sector skills / services / products?

Market specific briefings - say...Is China or say India a threat or an opportunity? If these countries are an opportunity what are the emerging markets and what are the risks around protecting IP and monetising products / services?

Brexit has done huge damage to UK exporters. The UK is now seen in Europe as anti-European, and we must redress this.
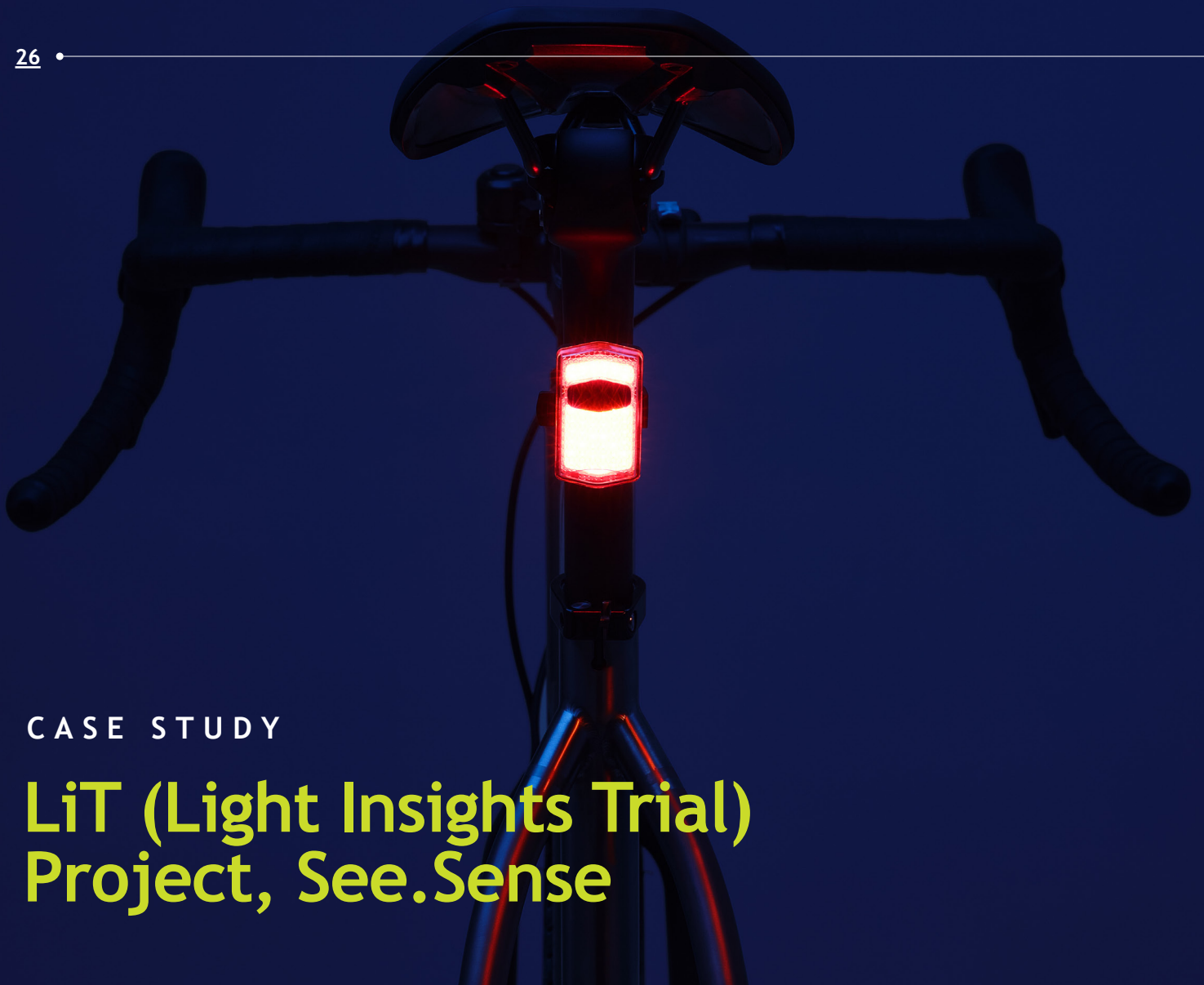
CASE STUDY

LiT (Light Insights Trial) Project, See.Sense

The LiT Project was a collaboration between See.Sense, the State of Victoria's Transport Accident Commission (TAC), iMove Cooperative Research Centre, and Deakin University in Australia.

The project aimed to gather data insights to better understand the factors affecting cyclist safety. The goal was to use this information to inform future policy planning and infrastructure improvements for bike riders. To achieve this, 800 cyclists were equipped with See.Sense patented rear lights, which were paired with the See.Sense app to collect data over a period of 12 months.

The lights not only enhanced participant visibility but also recorded various data points such as crash events, near misses, road conditions, and average speeds. Participants could report incidents and make infrastructure requests using the See. Sense mobile app.

The data collected from the project was compiled into a dashboard by Deakin University to conduct analysis and visualisation. Using this data dashboard, analysts at Deakin University were able to examine the data recorded by the See.Sense lights in conjunction with the contextual information of where this data was recorded.

The LiT Project generated a rich dataset that provided valuable insights and potential for policy changes related to road safety and cycling promotion.

"The Light Insights Trial has successfully investigated and proved the potential of crowd-sourced ride data in generating road safety insights by combining the ride data with a range of contextual data related to road infrastructure, road geometry, and traffic control characteristics."

Ashim Debnath, Head of Civil and Environmental Engineering Discipline and Associate Professor of Transportation Engineering at Deakin University

The data also set a precedent for creating new and robust cyclist communication and engagement strategies that can benefit other areas of road safety. For example, one suggested communication strategy is the promotion of safer cycling routes for school children based on the new risk-area data.

The trial's success underscored the importance of ongoing investments in similar initiatives, with the results serving as a precedent for implementing similar projects in other areas outside Melbourne and Geelong, creating a network of advocates who can provide real-time data.

This expansion could benefit cyclists and contribute to informed investments in response to the growing presence of e-scooters and e-bikes in the Australian transport ecosystem.

"The Light Insights Trial has shown us the potential for technology to engage and invigorate a key community group on the topic of road safety and how Road Safety professionals and agencies can work with them to deliver the best outcomes. We've been overwhelmed by the support and passion shown from trial participants and key stakeholders and will continue to develop our engagement in this area through continued work with this cohort of riders."

David Young, Acting Manager in Road Safety Research, Insights and Evaluation at TAC

The Road to 2027:
The ITS World Congress

In October 2023, at the 29th ITS World Congress in Suzhou, it was announced that Birmingham was the 'preferred city' for the 33rd ITS World Congress in 2027.

What is an ITS Congress?

The ITS Congress is a yearly event showcasing smart mobility, emphasising the importance of raising awareness of mobility solutions and services among policymakers, experts, thought leaders and stakeholders.

They represent the ultimate platform through which the international ITS community can meet, discuss, and exchange knowledge throughout the sector. Each World Congress welcomes more than 12,000 attendees from over 100 countries worldwide.

The Congresses work through a comprehensive Technical and High-Level Conference programme, live demonstrations and vibrant exhibitions showcasing cutting-edge technologies and innovations in smart mobility.

The Vision for Birmingham

At Birmingham ITS World Congress in 2027, the focus will be on 'Future Transport: For Real'. The Congress will unpack the vision for our transport systems, the cutting-edge ideas, and the blockers that stand in our way.

The Congress will put the spotlight on the UK's businesses, educators, public authorities, and third sector. Delegates will gain hands-on experience of how we're using ITS to tackle the global challenges to improve accessibility, reduce traffic, and electrify transport.

Why Birmingham?

Birmingham is an unrivalled city in which to immerse delegates in the reality of future transport. The city is at the crossroads of the national transport network. The Birmingham population is the youngest, most diverse in the UK. The street-scene is entwined with a rich history. And the businesses, public bodies, and educators are technology trailblazers. Birmingham is also a city like every other. As a region, it is working to tackle the climate emergency, support local communities, and create a fairer society.

Next steps

Negotiations will now start to sign an agreement between Birmingham and ERTICO – ITS Europe – to confirm the city as the 2027 Congress Host. Planning will then begin, bringing together industry and government to support the development of the Congress. West Midlands Combined Authority (WMCA), the Department for Transport (DfT) and ITS UK will provide further information in due course.

Get in touch:
ITSWorldCongress2027@wmca.org.uk

Mark Harper, Secretary of State, Department for Transport

"Birmingham hosting the 2027 ITS World Congress represents a great opportunity for the city and wider West Midlands, backed by UK Government funding, to show how the UK is at the forefront of developing the latest in future mobility.

Max Sugarman, Chief Executive, ITS UK

"Whether it's in connected and autonomous vehicles, the latest smart ticketing systems or the use of AI and data, our intelligent transport industry is brimming with innovation, with British companies supporting greener, safer and more integrated transport not only in the UK, but across the globe."

Andy Street, Mayor of the West Midlands and WMCA Chair

"Innovation and smart transport are a crucial part of our plans to decarbonise our transport and meet the climate change challenge. We will welcome industry leaders, policymakers, and researchers from around the world here to share their expertise and cement our place as a hub for transport innovation."

Suzhou, China
2023

Dubai, UAE
2024

Atlanta, USA
2025

Gangneung, South Korea
2026

Birmingham
2027
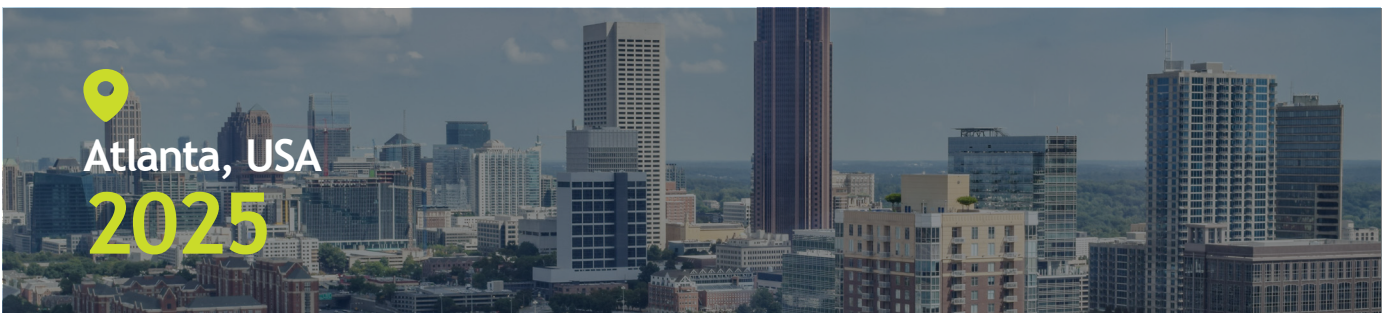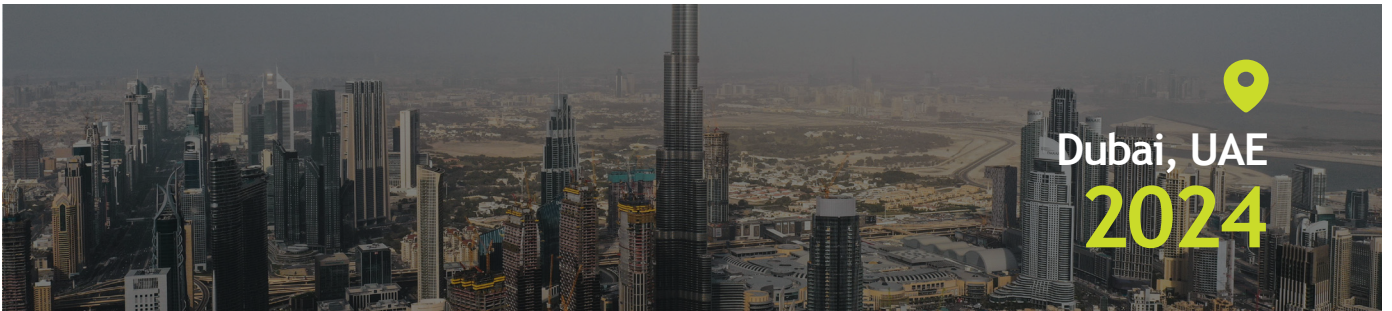
Conclusion and next steps

This Study presents a UK intelligent transport sector that has great potential to develop and grow over the coming years. Out of the more than 100 businesses surveyed, nearly 70% said they were optimistic about their prospects overseas, with 60% taking a similarly positive view of the industry's outlook as a whole. These figures back up what many in the sector will have suspected – that the ITS industry is one with major opportunities for global growth.

In order to achieve this growth, however, industry and government need to work in tandem and in a strategic and informed way, focusing resources on the areas that matter. How can we support the industry to sell more internationally? UK exporters clearly want to see greater promotion of the UK industry to overseas partners and backing for attendance at overseas trade shows.

The Study also shows where to focus our resources, with the United States of America, Australia, Germany, France and the Netherlands identified as the top five priority markets for UK companies. Whilst the UK will need to continue its engagement with all parts of the global ITS community, these countries will provide UK businesses with the great opportunities, so it is essential they get the support they need to enter these new markets.

What next?

In 2024, ITS UK will be developing an Exports Support Programme for its members based on the priorities set out in this paper, consisting of inbound and outbound trade missions, study tours, briefings, and updates on the top priority markets this Study has identified. We will work with ITS UK Members and the wider sector to inform this Programme.

For further information, email contact@its-uk.org

ABOUT ITS UK

Intelligent Transport Systems UK is the voice of the transport technology industry

Intelligent
Transport Systems UK
Empowering Transport Technology

We provide a national platform to support the roll out of technology for a cleaner, safer and more effective transport network, both at home and abroad.

We support our 150+ members – from both the private and public sector, and covering all sizes and disciplines – through advocacy to policy makers, connecting people and organisations, promoting the industry overseas and supporting innovation across the intelligent transport ecosystem.

Our members are at the cutting-edge of technology, working in areas like Mobility as a Service (MaaS), traffic management and enforcement, integrated transport, data analytics, sensing and monitoring, connected and autonomous vehicles, active travel, public transport services, smart ticketing and much more.

ITS UK Membership provides all you need to navigate the sector, including:

- More than 30 events held a year, with 15 Forums dedicated to the latest industry issues and updates.

- Engagement across the political spectrum and across the UK and its devolved nations and regions, including key events with Ministers and senior political stakeholders.

- Regular trade missions both in the UK and overseas, with a range of international markets, building upon the 35+ agreements we've signed with ITS organisations across the world.

- The latest information and intelligence through briefings and updates, our weekly newsletter and our ITS UK Annual Review.

- An opportunity to celebrate the industry through Awards, support for Early Careers Professionals and Women in ITS Group.

Find out more at www.its-uk.org

ITS UK welcoming a delegation from ITS Nigeria, the Nigerian Federal Ministry of Transportation and the Nigerian Institute of Transport Technology (NITT)

ITS UK's International Partners

ITS UK has Memoranda of Understanding (MoUs) signed with more than 35 international ITS and transport technology associations.

These MoUs allow for the co-operation of the UK industry with the wider international community, with ITS UK members able to benefit through introductions to a respective market through ITS UK's relationship with that market's international association.

If you would like to find out more about ITS UK's international partnerships, email contact@its-uk.org

ATEC (ITS France)	China ITS Industry Alliance	Connekt (ITS Netherlands)	ERTICO	ITS America
ITS Argentina	ITS Australia	ITS Belgium	ITS Bulgaria	ITS Canada
ITS Estonia	ITS Finland	ITS Germany	ITS Greece	ITS Hong Kong
ITS India	ITS Ireland	ITS Israel	ITS Japan	ITS Korea
ITS Latvia	ITS Malta	ITS mobility e.V.	ITS New Zealand	ITS Nigeria
ITS Poland	ITSA Shenzhen	ITS Singapore	ITS South Africa	ITS Sweden
ITS Taiwan	ITS Thailand	Latvian Transport Development & Education Association	REAM Malaysia	TTS Italia
Nigerian Institute of Transport Technology (NITT)				

ITS UK is a member of the Network of Nationals a grouping of national ITS interests formed in order to ensure that ITS knowledge and information is transmitted to all actors at the local and national level – such as small and medium sized companies – and support ITS promotion from the ground up. **www.itsnetwork.org**

ABOUT THE TRANSPORT
TECHNOLOGY FORUM

The Transport Technology Forum (TTF) exists to give leadership, direction and support and to stimulate investment in innovation and technology solutions

The Forum provides a dynamic space where road operators and their suppliers can exchange information and agree to work more collaboratively in order to achieve a more cohesive approach.

The Forum encourages the adoption of new ways of thinking and innovative technical solutions for the improvement of traffic flow through better network operation and management. This in turn will deliver significant economic, social and business benefit to the UK.

The Forum also aims to ensure that its stakeholders gain and maintain a fair share of voice with policy-makers.

The Forum's remit includes, but is not limited to:

- Intelligent Transport Systems (ITS), including Connected ITS (C-ITS);
- Automotive;
- Smart Mobility and Mobility as a Service (MaaS);
- Smart Cities and communities;
- Logistics;
- CT and related developments including Cloud computing and Big Data.

The Forum has no statutory remit and its impact and influence are entirely dependent on the momentum it generates, the soundness of its judgments and the quality of work it produces.

The Transport Technology Forum receives funding from the Department for Transport and Innovate UK to help achieve change and technological innovation with collaborating organisations.

Find out more at www.ttf.uk.net

Appendix

C. Priority markets

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Answer Choices	Highest Priority Marketw	Second Priority Market	Third Priority Market	Fourth Priority Market	Fifth Priority Market	Total priorities from all five in order (out of 500%)
United States of America	41.18%	8.06%	6.25%	7.89%	6.45%	69.83%
Australia	7.35%	12.90%	4.17%	7.89%	3.23%	35.54%
Germany	1.47%	11.29%	8.33%	5.26%	6.45%	32.81%
France	8.82%	4.84%	6.25%	7.89%	3.23%	31.03%
Netherlands	4.41%	3.23%	6.25%	7.89%	3.23%	25.01%
Canada	0.00%	11.29%	6.25%	2.63%	3.23%	23.40%
Ireland	8.82%	6.45%	2.08%	2.63%	3.23%	23.21%
Spain	0.00%	3.23%	2.08%	10.53%	3.23%	19.07%
United Arab Emirates	4.41%	6.45%	4.17%	0.00%	3.23%	18.26%
Belgium	2.94%	1.61%	0.00%	0.00%	12.90%	17.45%
China	4.41%	4.84%	0.00%	0.00%	3.23%	12.48%
New Zealand	2.94%	0.00%	6.25%	0.00%	3.23%	12.42%
Sweden	1.47%	0.00%	6.25%	2.63%	0.00%	10.35%
Finland	1.47%	1.61%	0.00%	0.00%	6.45%	9.53%
Saudi Arabia	0.00%	3.23%	6.25%	0.00%	0.00%	9.48%
India	2.94%	1.61%	2.08%	2.63%	0.00%	9.26%
Chile	0.00%	0.00%	0.00%	5.26%	3.23%	8.49%
Norway	2.94%	0.00%	2.08%	0.00%	3.23%	8.25%
Italy	0.00%	1.61%	0.00%	0.00%	6.45%	8.06%
Japan	0.00%	0.00%	2.08%	2.63%	3.23%	7.94%
Denmark	0.00%	3.23%	4.17%	0.00%	0.00%	7.40%
Portugal	0.00%	0.00%	2.08%	5.26%	0.00%	7.35%
Poland	1.47%	1.61%	4.17%	0.00%	0.00%	7.25%
Qatar	0.00%	1.61%	0.00%	5.26%	0.00%	6.87%
Uganda	0.00%	0.00%	0.00%	0.00%	6.45%	6.45%
Kenya	0.00%	0.00%	2.08%	0.00%	3.23%	5.31%
Kuwait	0.00%	0.00%	2.08%	2.63%	0.00%	4.71%
South Africa	0.00%	0.00%	2.08%	2.63%	0.00%	4.71%
Austria	0.00%	1.61%	2.08%	0.00%	0.00%	3.69%
Bangladesh	0.00%	3.23%	0.00%	0.00%	0.00%	3.23%
Mongolia	0.00%	0.00%	0.00%	0.00%	3.23%	3.23%
Singapore	0.00%	0.00%	0.00%	0.00%	3.23%	3.23%
Czech Republic	0.00%	0.00%	0.00%	0.00%	3.23%	3.23%
Ecuador	0.00%	0.00%	0.00%	2.63%	0.00%	2.63%
Luxembourg	0.00%	0.00%	0.00%	2.63%	0.00%	2.63%
Malaysia	0.00%	0.00%	0.00%	2.63%	0.00%	2.63%
Mexico	0.00%	0.00%	0.00%	2.63%	0.00%	2.63%
Mozambique	0.00%	0.00%	0.00%	2.63%	0.00%	2.63%
Swaziland	0.00%	0.00%	0.00%	2.63%	0.00%	2.63%
Costa Rica	0.00%	0.00%	2.08%	0.00%	0.00%	2.08%

Answer Choices	Highest Priority Marketw	Second Priority Market	Third Priority Market	Fourth Priority Market	Fifth Priority Market	Total priorities from all five in order (out of 500%)
Hungary	0.00%	0.00%	2.08%	0.00%	0.00%	2.08%
Indonesia	0.00%	0.00%	2.08%	0.00%	0.00%	2.08%
Switzerland	0.00%	0.00%	2.08%	0.00%	0.00%	2.08%
Estonia	0.00%	1.61%	0.00%	0.00%	0.00%	1.61%
Greece	0.00%	1.61%	0.00%	0.00%	0.00%	1.61%
Peru	0.00%	1.61%	0.00%	0.00%	0.00%	1.61%
Turkey	0.00%	1.61%	0.00%	0.00%	0.00%	1.61%
Israel	1.47%	0.00%	0.00%	0.00%	0.00%	1.47%
Latvia	1.47%	0.00%	0.00%	0.00%	0.00%	1.47%
Respondents	68	62	48	38	31	500.02%

Individual Mentions of Continents and Countries

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Countries	Number
US	20
Australia	16
Ireland	11
Canada	6
New Zealand	6
Netherlands	5
Sweden	4
France	4
Qatar	3
Israel	3
Norway	3
Germany	3
Spain	3
Finland	3
Fiji	2
Denmark	2
Iceland	2
UAE	2
Brazil	2
Chile	2
Uganda	2
South Africa	2
Singapore	2
India	1
Egypt	1
Mauritius	1
Switzerland	1

Countries	Number
Slovakia	1
Poland	1
Latvia	1
Kazakhstan	1
Ecuador	1
Columbia	1
Scandinavia	1
Thailand	1
South Korea	1
Saudi Arabia	1
France	1
Japan	1
Austria	1
Malta	1
Luxembourg	1
Belgium	1
Argentina	1
Cyprus	1
Seychelles	1
China	1
Bahrain	1
Malaysia	1
Ethiopia	1
Indonesia	1
Sri Lanka	1