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Worldwide **Electronic Toll Collection market to double** from 2016 to 400 million subscriptions in 2025

PTOLEMUS Consulting Group has announced the release of the Electronic Toll Collection (ETC) Global Study 2015. The 650-page reference document is the most comprehensive report on the market and is available to download from the [PTOLEMUS website](#). Interested parties can also download the free [95-page abstract](#).

The study's key findings are highlighted below:

- The average penetration of electronic tolling by revenue in Europe is set to increase from **71% in 2015 to 86% in 2025**. The growth is led by the expansion of the German HGV road user charging scheme.
- Revenues from road charging are set to nearly triple from 2015 to 2025 and will exceed **€170 bn**.
- The global road charging market is set to grow to over 400 million active subscriptions by 2025, following a rush of 14 new nationwide programmes implemented between 2013 and today. However, despite the EETS directive and other interoperability programmes, **none of the new ETC programmes share any resemblance, nor allow for interoperability with their neighbours**.
- A case in point comes from the European Commission's home country where the forthcoming 11th European truck tolling programme in Belgium will **not even use axle count** as toll criteria - one of the very few commonalities between other European schemes.
- Despite the regulations restricting the choice of toll technologies in Europe, GNSS and DSRC are still competing with new eVignette schemes. Outside Europe, **RFID** is becoming the go-to technology for free flow electronic tolling.
- From 2016, RFID will become the most popular device technology, overtaking DSRC in terms of number of units sold. The share of cumulative electronic tolling subscriptions based on RFID technology will peak at 47% from 2019 and by 2025 we estimate there will be more than **178 million ETC subscriptions based on RFID** systems worldwide.
- Italy is currently the biggest ETC market in Europe with 8.5 million Telepass customers, although we expect **Turkey will take the lead in 2016** with nearly 9 million subscribers.

The free abstract brings together critical findings from two years of research and details the fundamentals of the road charging market coming from interviews with key names in the industry:

- **Marc Billet**, Head of EU Goods Transport at the **International Road Transport Union (IRU)**, representing transporters paying the toll.
- **Peter Ummenhofer**, VP Solution Management Division and **Marcus Handl**, Investor Relations & Strategy Officer at **Kapsch TrafficCom**, the largest player in the toll industry.
- **Martin Stone**, General Manager of **Egis Projects USA** managing the most important interoperability project, the **ATI HUB**.

The abstract also details the fundamentals of the ETC market including the major strategy and technology trends and their effect on the transport market in Europe and the US.

Download the free abstract [here](#). For more information about the full study contact thomas@ptolemus.com

About PTOLEMUS

PTOLEMUS Consulting Group is the first strategy consulting firm entirely focused on telematics and location-based services and. Run by Partners in Brussels, London, Paris, Milan, Hamburg and Boston, PTOLEMUS assists leading insurers, car makers and service providers in defining and executing their telematics strategy.

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