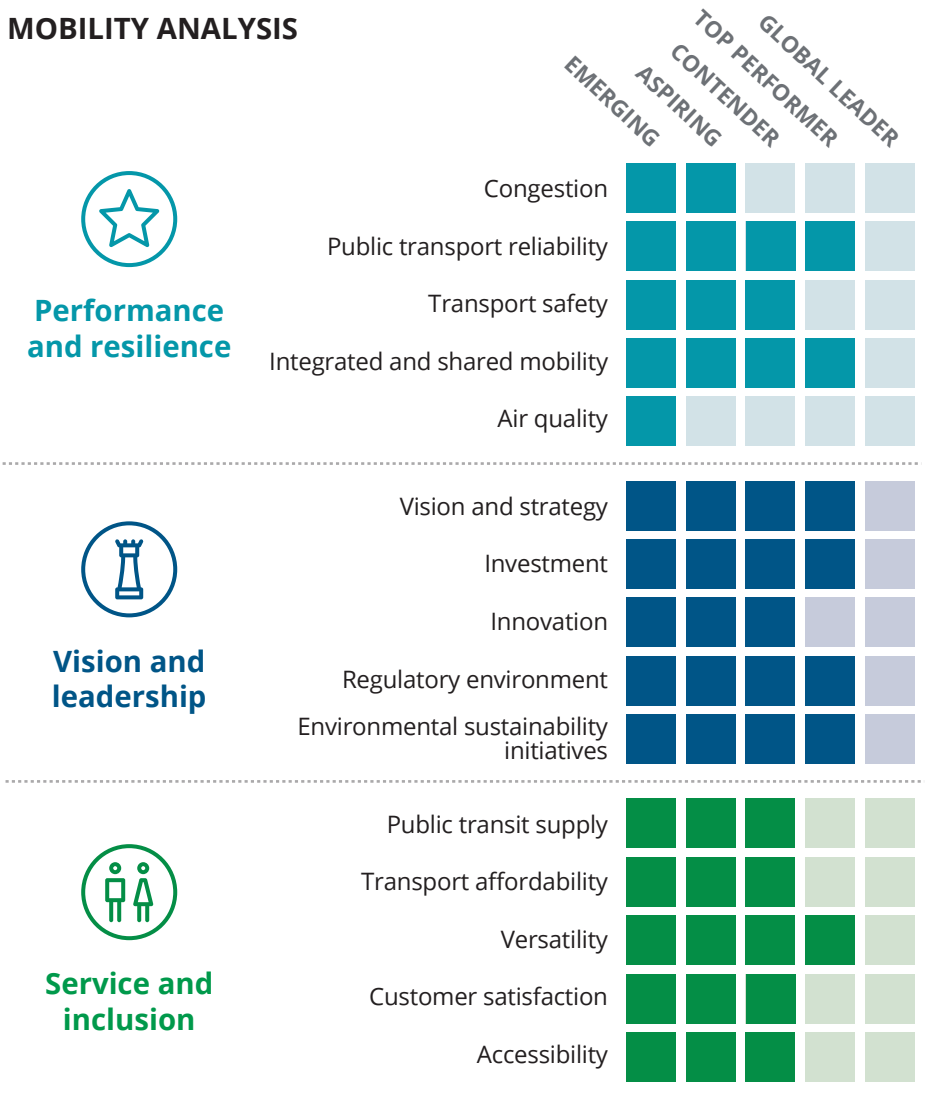


Analysis area

MOBILITY ANALYSIS



KEY MOBILITY STATISTICS

Public transport options*
Metro, bus, commuter train

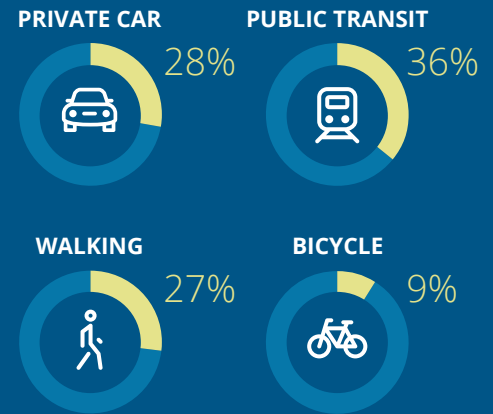
Monthly public transport pass
US\$34

GDP
US\$391 billion (2016)

Principal transport authorities
Beijing Municipal Commission of Transport

**Planned, regulated, licensed, subsidized, and monitored by principal transport authority.*

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY CAPABILITY



STRENGTHS

- Strong government commitment to improving transport and substantial backing for infrastructure investments
- Plans to upgrade the public transport infrastructure by deploying new signaling systems and driverless metros
- A balanced modal split and moves toward further promotion of sustainable transport, such as electric vehicles (EVs), and bicycles and pedestrian walkways

CHALLENGES

- Very high levels of traffic gridlock and air pollution, despite high alternative transport use
- Low provision of real-time traffic information and restrictions on data-sharing for foreign players
- Fragmented policy and decision-making processes related to infrastructure involving urban, transport, and national government agencies

Key focus areas to improve city mobility and realize the Future of Mobility:



MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Struggling with high congestion and poor air quality, Beijing is looking toward innovative solutions, such as ride-hailing services, contactless payment, and low-emission zones.

- The capital city now has the largest private vehicle ownership and one of the longest commute times during rush hour in China; in 2017, the average daily travel time for Beijing's workers was 52.9 minutes.
- The city is encouraging the use of new technologies, such as ride-hailing and contactless payment, integrated across modes, to provide efficient and high-quality transport services.
- Beijing launched a low-emission zone in September 2017, banning heavy-duty freight vehicles with emissions above the National IV Standards from entering the city. The move is expected to reduce public health hazards and save an estimated 43 lives and more than RMB 200 million (USD 31 million) per year. While air quality has improved in recent years, it remains a key issue.

 **Vision and leadership**

Beijing has plans to develop sustainable transport, with government investments focused on expanding its public transport infrastructure.

- The city planners have assured investment of more than RMB 400 billion (USD 62 billion) to expand the metro network and to build a one-hour commuting circle covering suburbs and adjacent cities.
- Beijing has been pushing for years for a greater adoption of EVs, with comprehensive policies and subsidy schemes in place. The city also has the largest EV ownership in the country, with the highest car-per-charging pile ratio.
- The city also plans to encourage cycling as a greener way to commute, with 3,200 km of bike lanes and at least 100,000 bicycles for rent.

 **Service and inclusion**

Public transport is affordable for most citizens, but requires technological upgrades and expansion in suburban regions.

- With swelling urban expansion, the public transport supply needs to grow substantially. Recognizing as much, Beijing transportation authorities have set out plans for the capital's transportation development for the next five years, which involves expanding the bus lane network to 1,000 km.
- The city's public transit system is affordable due to large subsidies provided by the government to ensure equitable access for minimum wage earners.
- The metro network is popular and boasts intervals of only a minute between trains in the morning peak period.

SUMMARY

Beijing has taken multiple measures to make itself a livable city. It has a forward-looking approach to its transport issues and has formulated strong development plans for the next five years. These plans involve expansion of public transport and sustainable modes of transport, evident in the 72 percent share occupied by public transport and active modes. It has also embraced testing of new mobility solutions, such as EVs and shared mobility models. A number of these initiatives are already bearing results.

Nonetheless, the city faces some immediate challenges in terms of ongoing air pollution, traffic congestion, and the need for operational improvements in public transport and stronger coordination efforts among the various government agencies.

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About the Deloitte City Mobility Index

The Deloitte City Mobility Index reviews major cities on key aspects of mobility and the resulting relationship to economic performance. Drawing on publicly available data, client conversations, and bespoke Deloitte analyses, we assess each city's ability to transport its citizens both now and in the future and therefore its potential to bring prosperity to the city.

As we receive feedback, we will update and expand the analysis, which may mean the results shown in this document may change.

For the full interactive index, visit the Deloitte City Mobility Index at deloitte.com/insights/mobility-index.

For Deloitte's insights on the Future of Mobility, visit deloitte.com/insights/future-of-mobility.

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