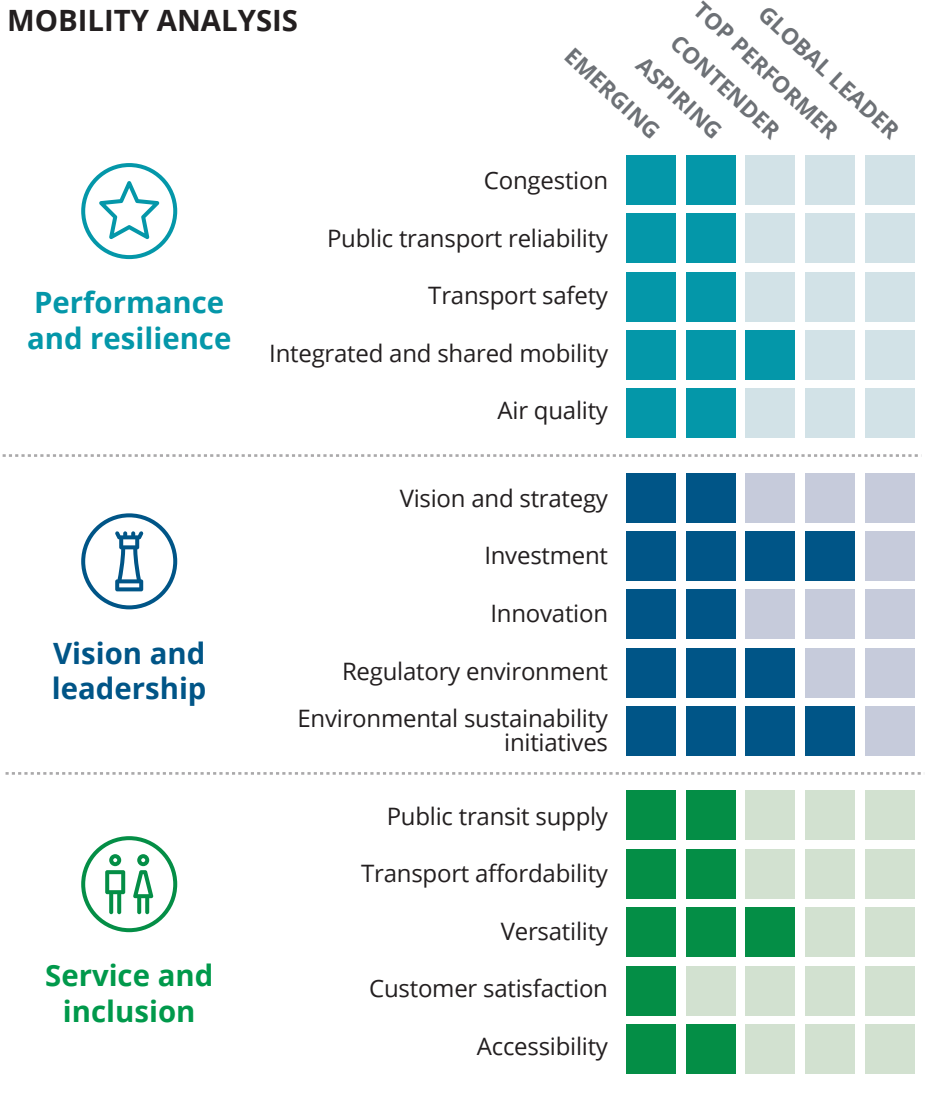
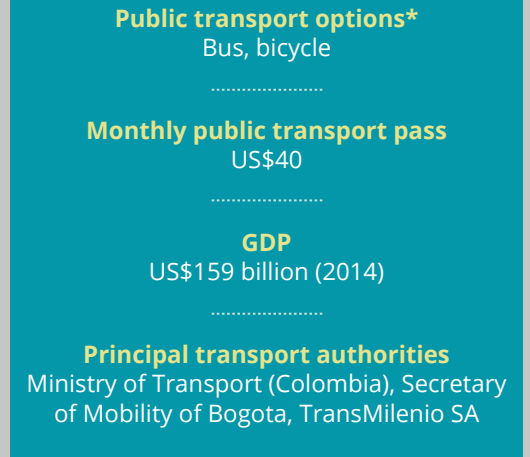




### MOBILITY ANALYSIS

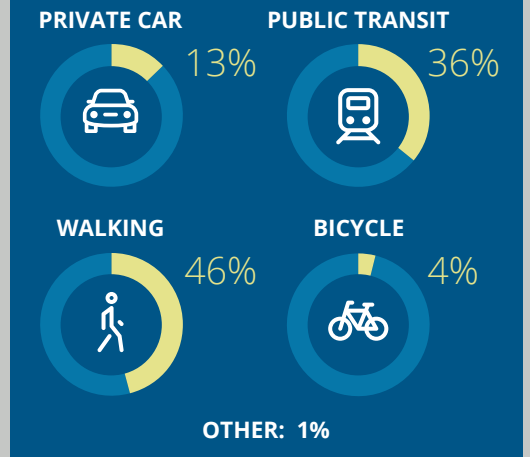


### KEY MOBILITY STATISTICS



\*Planned, financed, licensed, and monitored by principal transport authorities.

### JOURNEY MODAL SPLIT



### FUTURE OF MOBILITY CAPABILITY



#### STRENGTHS

- Bus rapid transit (BRT) a key component of public transport, providing 2.2 million daily trips over 113 km
- Strong culture of walking and cycling, supported by government initiatives such as a partial ban on cars on specific routes
- A citywide network of 344 km of bicycle routes for daily commuting

#### CHALLENGES

- Overlapping of bicycle and pedestrian lanes in some parts of the city, leading to a confusing surface-transport network
- Speeding up the construction of the delayed metro project
- Developing a forward-looking transport plan for the next decade, as the population is set to increase beyond 10 million by 2025

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



Create a separate transport authority to oversee metro and BRT operations and planning



Develop more public transport connections and continue to expand cycling routes



Increase the number of transport data sets on open data platforms to attract mobility startups

## MOBILITY ANALYSIS FURTHER DETAILS:



### Performance and resilience

Bogotá faces congestion issues, even though trips made by car constitute only 13 percent of journeys, due to the limited road network. The region's transport is currently based on a BRT system run by private operators.

- Bogotanos lose almost two work weeks per year in traffic. Congestion is caused by a lack of road infrastructure such as automated signaling and traffic management systems.
- Multiple bus operators use the TransMilenio-owned rapid transport lanes, and there are Integrated Public Transport System (Sistema Integrado de Transporte Público or SITP) buses as well. The average waiting time is around 20 minutes, one of the highest among Latin American cities.
- The region has an integrated transport card, accepted by all BRT operators and SITP buses, which may be expanded to include the metro once it is operational. The number of ridesharing and carsharing firms is gradually increasing.



### Vision and leadership

Funding for the delayed metro project was approved in 2017. The metro is projected to save 1 billion hours by 2052 via reduced commuting time. Bogotá is known for its sustainability initiatives, which have led to 50 percent of trips being made through active modes of transport.

- The 24-km Bogotá Metro project is taking shape, with operations slated to start in 2020. The Colombian government and the Bogotá City Council have funded a total investment outlay of US\$4.1 billion.
- Bogotá has been expanding its zero-emission bus fleet since 2013, when it introduced 200 hybrid buses on the TransMilenio network. Since 2017, it has moved toward a fully electric bus fleet.
- Bogotá has been running the “CicloVía” program since 1974, whereby the city restricts cars on 121 km of roads on public holidays and weekends.



### Service and inclusion

Accessibility and low customer satisfaction are areas of concern for the bus-based public transport system, which requires rapid expansion to meet increasing demand.

- With an average urbanization rate of 4.5 percent per year, Bogotá's transport has started to reach the saturation point. The TransMilenio network needs to be expanded to cater to new suburban regions surrounding the city.
- According to a 2015 survey, 80 percent of Bogotá's were not satisfied with the TransMilenio network due to high crime rates, overcrowding, and waiting times of up to 45 minutes at some stations during rush hour. Innovative solutions, such as mobile-based occupancy apps, could help by showing bus stops and the inside of buses.
- Few buses are suitably equipped for the disabled. The TransMilenio network has better accessibility, with revolving doors and ramps.

## SUMMARY

According to a city government report, rapid urbanization is going to be the biggest challenge for the region in the coming years. Bogotá's public transport will have to provide 10.5 million trips per day by 2030. To address this, the government is investing in a new metro system to complement the existing BRT system. The city has launched multiple sustainability initiatives to improve active modes, but it needs robust urban and traffic planning to differentiate pedestrian, cycling, and car lanes. The city does have an open data policy but it is still nascent. Bogotá can also start to look into urban solutions based on data analytics to streamline road traffic.

## CONTACTS

### Simon Dixon

Global Transportation leader  
Partner  
Deloitte MCS Limited  
Tel: +44 (0) 207 303 8707  
Email: [sidixon@deloitte.co.uk](mailto:sidixon@deloitte.co.uk)

### Javier Lancho

Leader, Financial Advisory S-LATAM  
Partner  
Deloitte Ases. y Consulto  
Tel: +57 (1) 546 1810  
Email: [jlanch@deloitte.com](mailto:jlanch@deloitte.com)

### Astrid Fernandez

Leader Infrastructure & Capital  
Projects, S-LATAM  
Partner  
Deloitte Ases. y Consulto  
Tel: +57 31 7440 9311  
Email: [asfernandez@deloitte.com](mailto:asfernandez@deloitte.com)

### 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](https://deloitte.com/insights/mobility-index).

For Deloitte's insights on the Future of Mobility, visit [deloitte.com/insights/future-of-mobility](https://deloitte.com/insights/future-of-mobility).

### About this publication

This publication has been written in general terms and we recommend that you obtain professional advice before acting or refraining from action on any of the contents of this publication. Deloitte MCS Limited accepts no liability for any loss occasioned to any person acting or refraining from action as a result of any material in this publication.

### About Deloitte

Deloitte MCS Limited is registered in England and Wales with registered number 03311052 and its registered office at Hill House, 1 Little New Street, London, EC4A 3TR, United Kingdom.

Deloitte MCS Limited is a subsidiary of Deloitte LLP, which is the United Kingdom affiliate of Deloitte NWE LLP, a member firm of Deloitte Touche

Tohmtsu Limited, a UK private company limited by guarantee (“DTTL”). DTTL and each of its member firms are legally separate and independent entities. DTTL and Deloitte NWE LLP do not provide services to clients. Please see [www.deloitte.com/about](https://www.deloitte.com/about) to learn more about our global network of member firms.

© 2019 Deloitte MCS Limited. All rights reserved