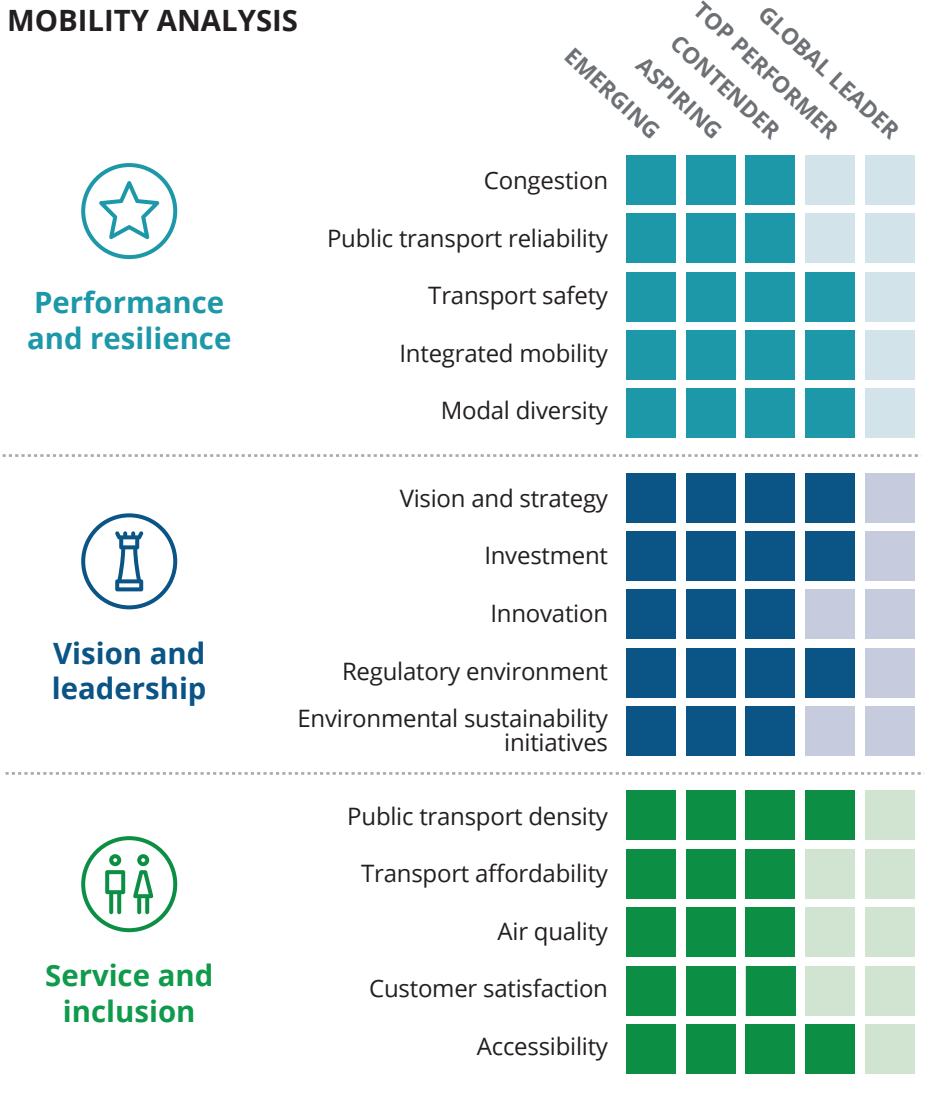


Analysis area: 162 km² | Population: 1,208,542 | Population density: 7,501/km²
 Definition of analysis area: Brussels Capital Region (19 municipalities)

MOBILITY ANALYSIS



KEY MOBILITY STATISTICS

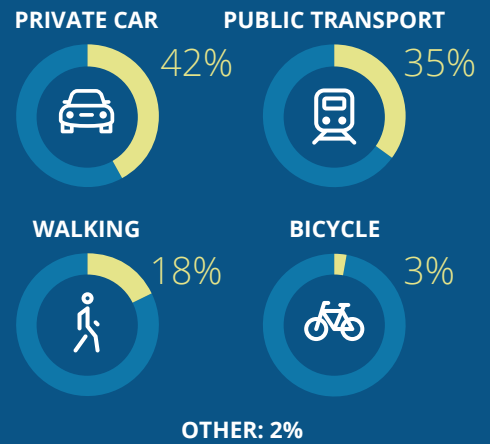
Public transport options*
 Commuter rail, light rail including metro and tram, bus, bicycle, waterbus

Monthly public transport pass
 US\$53

GDP per capita
 US\$72,000 (2019)

Principal transport authorities
 Bruxelles Mobilité

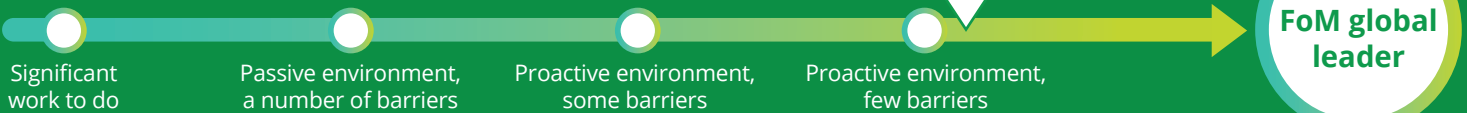
JOURNEY MODAL SPLIT



*Regulated, licensed, subsidised and monitored by principal transport authorities.

FUTURE OF MOBILITY CAPABILITY

Brussels



STRENGTHS

- New regional mobility plan emphasises public transport, reduced car use and car-free neighbourhoods for smoother, safer traffic flow and more active mobility
- Developing Mobility-as-a-Service (MaaS) solutions with ticket and price integration for public and private transport options
- Sustainability initiatives include Low Emission Zones (since 2018) and bans on non-electric company cars (from 2026), diesel (from 2030) and petrol (from 2035)

CHALLENGES

- Collaboration with surrounding Flemish and Walloon regions complicates implementation of Brussels' mobility vision
- Employers continue to offer cars as a salary benefit, and more than 350,000 commuters still favour the car, making a radical turnaround in behaviour difficult
- The EU Green Deal mandates a 55 per cent reduction in emissions by 2030 and the city becomes carbon neutral by 2050

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



Invest more in public space for pedestrians and cyclists



Implement intelligent road charging solutions to reduce car use



Offer more public and demand-driven transport options

MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

The Brussels authorities are introducing integrated software platforms, coupled with combined and contactless ticketing options, to enhance multimodal transport and encourage modal shift.

- The regional government is developing a public MaaS platform and has completed the pilot phase. The planned intelligent road charging solution aims to reduce the number of car journeys by 25 per cent by 2030. has been completed and will include MaaS functionalities.
- The larger metropolitan region has tariff and ticket integration. Transport operator STIB/MIVB has contactless payment in every metro station, tram and bus; and the MOBIB card provides a single ticketing platform for all Belgian transport operators.
- Brussels promotes road safety by giving priority to pedestrians and cyclists, with a target of zero traffic deaths by 2030 ('Vision Zero').



Vision and leadership

The region's award-winning plans include a range of initiatives and long-term projects to expand the mobility network. The plans aim to foster an open and innovative climate for operators and developers.

- The Brussels Good Move regional mobility plan (2020-2028) aims to create a more efficient public transport system, reduce personal car use by 24 per cent, improve road safety, reduce emissions, quadruple bicycle use and increase the amount of public spaces.
- The long-term climate plan will address the city's long-standing air pollution problem and achieve complete decarbonisation by 2050 through bans on cars and a stricter Low Emission Zone (LEZ).
- The city is undertaking a €1.6 billion (US\$1.9 billion) metro expansion to improve the connections between northern Brussels and the rest of the city. It includes upgrading an existing line to full metro standard by 2025 and the construction of seven new metro stations and a depot by 2030.



Service and inclusion

The region has seen an uptake in cycling thanks to meaningful enhancements in the cycling infrastructure. It hopes to do the same with public transport use through the provision of free travel for targeted demographic groups.

- STIB/MIVB will offer free travel to individuals under 25 and over 65 years old from September 2021 to encourage greater use of public transport.
- Brussels has implemented several initiatives aimed at improving the cycling ecosystem: an additional 40 km of cycling lanes on major routes, improved bike availability and 'car park + bike' options. There has been a 75 per cent increase in the number of cyclists during the first week of the return to school in 2020.
- Brussels offers its residents a Bruxell'Air allowance for public transport or car-sharing subscriptions if they give up their cars. And more employers are offering mobility budgets to their employees, instead of the car benefit in kind.

SUMMARY

Brussels has a well-developed mobility system with an accessible, affordable, integrated transport network. The use of contactless payments, the integration of ticketing and tariffs within the bigger metropolitan area for all public transport operators and a public MaaS solution will accelerate multimodal travelling and provide much-needed flexibility.

The 'Zone 30' policy aims to make the region more attractive and healthier by creating more car-free and liveable neighbourhoods. Public transport will be further expanded with more coverage and frequency, and investments in cycling pathways will be increased. The biggest change in mobility behaviour will be through a rethink of the regional taxation of company cars and a move to an intelligent road charging system, unique in the world by using a 'polluter pays' principle.

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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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