

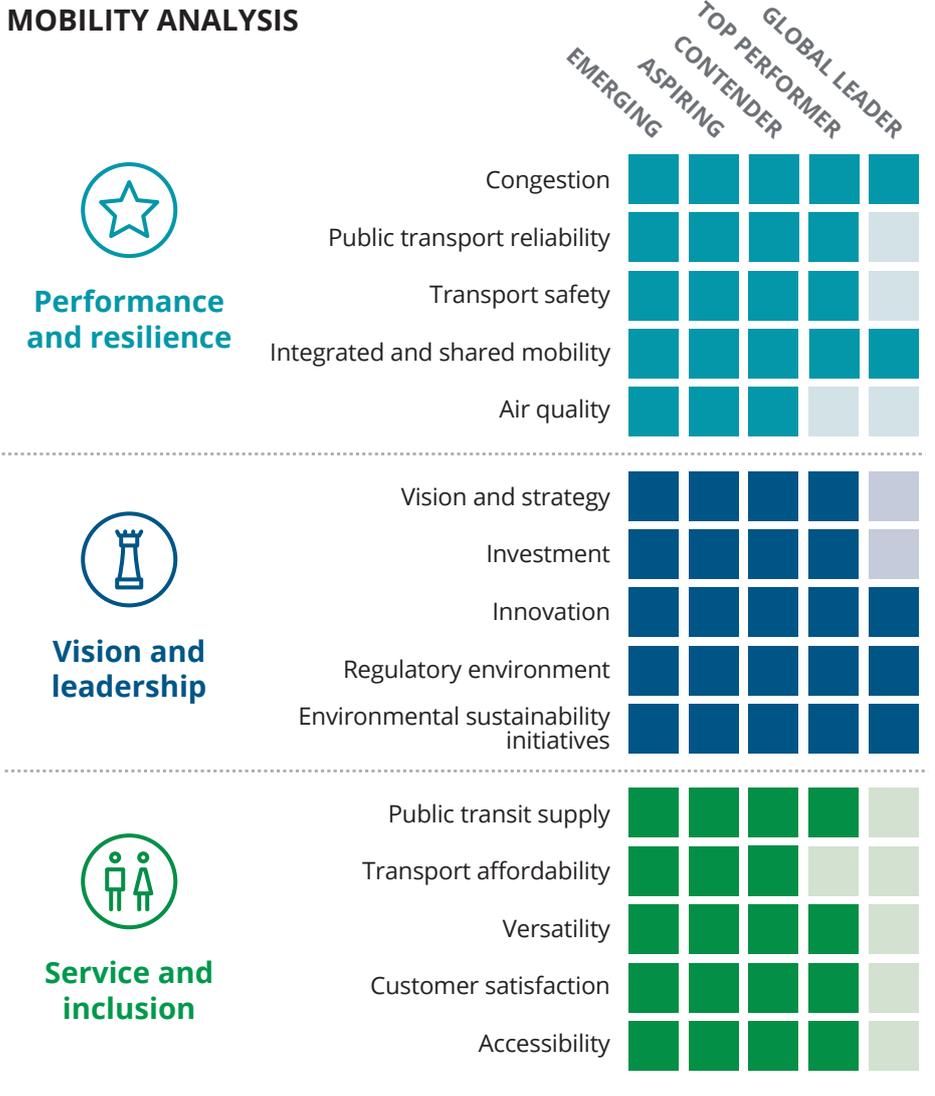


Analysis area

Analysis area: 746 km² | Population: 1,456,619 (2016) | Population density: 1,953/km²

Definition of analysis area: Helsinki Capital Region covers four adjacent municipalities including the city of Helsinki

MOBILITY ANALYSIS



KEY MOBILITY STATISTICS

Public transport options*
Metro, tram, bus, commuter rail

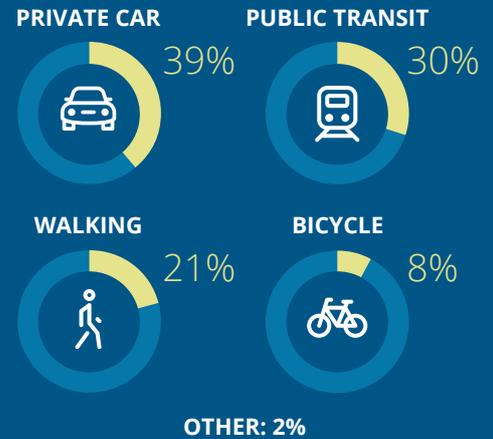
Monthly public transport pass
US\$129

GDP
US\$92 billion (2016)

Principal transport authorities
Helsinki Regional Transport Authority

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

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY CAPABILITY



STRENGTHS

- Presence of apps based on mobility-as-a-service (MaaS) that integrate private and public transport options
- High public transport adoption rates with future plans to further reduce car ownership in the city
- Deployment of autonomous buses in regular public transport services

CHALLENGES

- Providing affordable public transport, without compromising city finances
- Implementing smart parking with dynamic pricing
- Sustainably taking mobility solutions from pilot phase to deployment phase

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



Continue to collaborate with private players to accelerate deployment of new mobility solutions

Explore regulations and policies to promote and subsidize electric vehicles (EVs) and improve air quality

Consider further actions to improve and incentivize further active transport options such as cycling

MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

With its efficient and well-balanced transportation system, Helsinki is a top performer. The city has achieved high scores across all categories under this theme.

- Helsinki has a balanced modal share for public transport and an overall strong mix of active transportation options.
- It has a highly integrated and balanced public transport system with numerous modes: bus, tram, metro, and commuter rail, and excellent coverage and connectivity throughout the entire metropolitan area.
- However, the increasing modal share of private vehicles is a key factor behind Helsinki's high NOX emissions which affect its air quality. Vehicular traffic pricing is being considered to reduce traffic volume and in turn, harmful emissions.



Vision and leadership

Helsinki stands out as a leader in innovation. The city's plan for 2050 paints a compelling picture of a sustainable, integrated, and highly convenient transport system.

- The city's goals include making public transport the No. 1 choice for all travel by 2025 and phasing out private cars by 2050 through shared mobility, demand-responsive transport, and pedestrian-centric urban design.
- Finland is at the forefront of autonomous vehicle operations. With its launch of the RoboBusLine in 2017, Helsinki may soon provide regular last-mile solutions using self-driving buses.
- Electric cars currently constitute 1.3 percent of new cars. However, the Finnish government's new subsidy schemes for charging infrastructure can reduce "range-anxiety" issues and thus improve adoption.



Service and inclusion

Helsinki's transportation system scores highly in customer satisfaction, largely due to its ease of use. Moreover, Helsinki is leading the world in MaaS technology.

- Helsinki scores well on customer satisfaction for public transport services: high levels of security, convenience, and ease of use are the main contributing factors for the high score.
- An MaaS app created by a Helsinki startup allows citizens to travel on public and private services via a monthly subscription, providing more transport choices for the public.
- Public transport in Helsinki is accessible for disabled people. Most of the buses and more than half of the trams are low-floor vehicles with plans to increase more in the future.

SUMMARY

Mobility in Helsinki is well-developed and the city's commitment to innovation is consistently driving further improvement to the system. The public transport system is highly reliable and accessible throughout the city. Cycling and walking are also popular, despite often-adverse climatic conditions.

Helsinki is also leading the way with Future of Mobility concepts such as MaaS and shared mobility. The successful launch of self-driving public buses could provide early lessons to cities looking to adopt similar technologies.

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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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