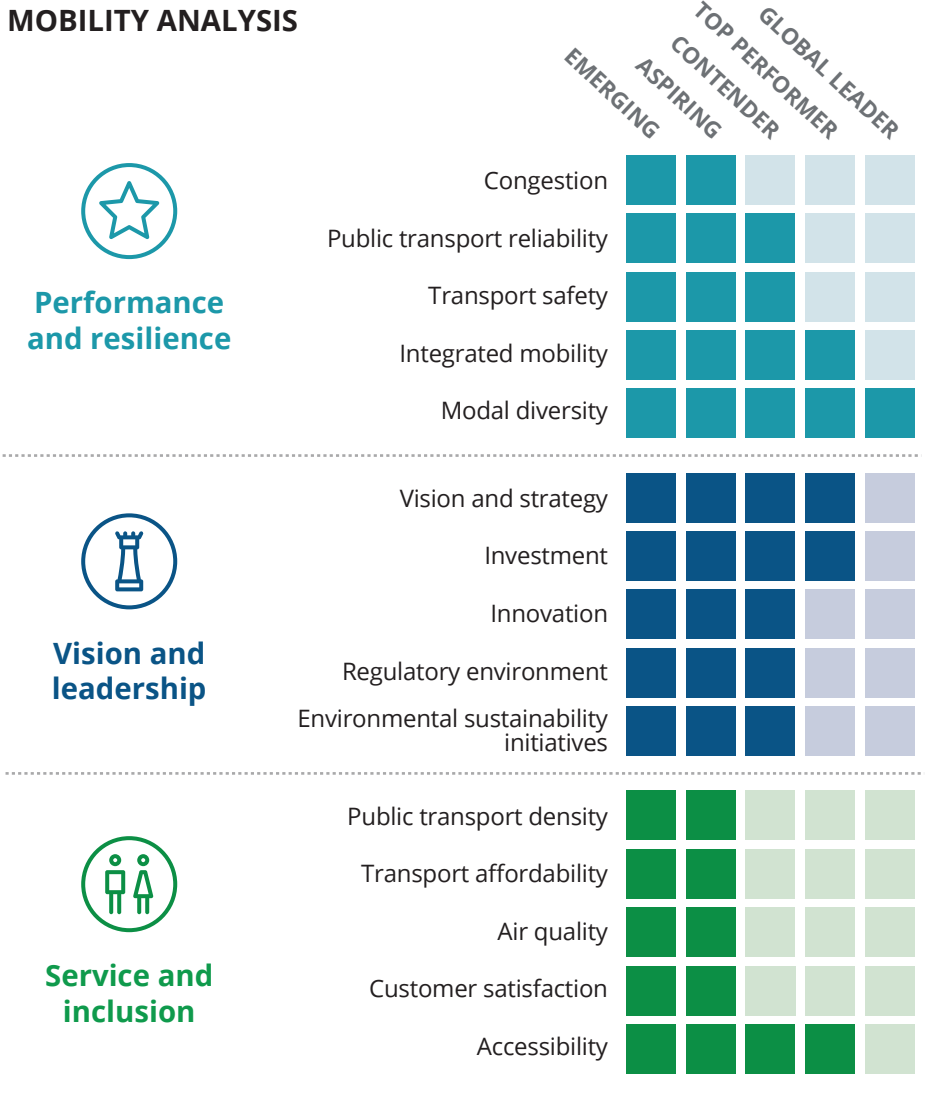


### MOBILITY ANALYSIS



### KEY MOBILITY STATISTICS

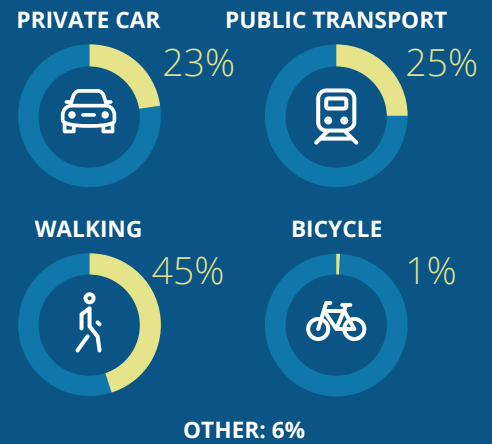
**Public transport options\***  
Commuter rail, light rail including metro and tram, bus, BRT, ferry (including sea taxi and sea bus), cable car/funicular, bicycle

**Monthly public transport pass**  
US\$41 (₺275)

**GDP per capita**  
US\$16,265 (2018)

**Principal transport authorities**  
Istanbul Metropolitan Municipality (IMM)

### JOURNEY MODAL SPLIT



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

### FUTURE OF MOBILITY CAPABILITY

Istanbul



#### STRENGTHS

- Istanbul's public transport network should see a much-needed expansion over the next few years
- A high level of digital connectedness makes the system adaptable, particularly for changing COVID-19 circumstances
- Both daily commuters and tourists have responded positively to the weekend 24-hour metro services

#### CHALLENGES

- The public transport network has limited coverage, and capacity is still not adequate for the growing population
- Congestion in the city is among the worst globally; commuters lose around 200 hours annually
- Frequent fare hikes result in reduced affordability of public transport for commuters

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



Leverage advanced technologies to control traffic congestion



Ensure sufficient funds for timely completion of infrastructure projects



Develop alternative revenue streams to decrease congestion and subsidise public transport

## MOBILITY ANALYSIS FURTHER DETAILS:



### Performance and resilience

A rapidly expanding and diverse transport network coupled with smart technologies has the potential to overcome Istanbul's long-standing congestion issues.

- Istanbul's rail network is set to expand from around 230 km to more than 450 km by 2024, with extensions to existing lines and new lines for the tram, funicular and metro.
- Owing to its unique topography, the city has highly developed water transportation, with more than 80 million passengers annually (pre-COVID). Yet the limited number of road connections over the Bosphorus strait is a major cause of traffic congestion. In 2016, a new bridge and tunnel were opened, but high toll rates (about two times higher than for the older bridges) limit its use.
- The city is implementing AI-based solutions that can evaluate road traffic, optimise public transportation and manage traffic. But recent plans to increase taxi numbers could further aggravate congestion.



### Vision and leadership

Turkey's smart vision for transport combines with novel local strategies to improve multiple facets of transportation, including network capacity, modal integration, congestion, parking and sustainability.

- The smart transport plan for 2020-23 aims at introducing a country-wide integrated electronic payment system for all transport networks. It includes the establishment of provincial traffic control centres, smart parking solutions and EV charging stations.
- The IMM raised US\$580 million through a Eurobond sale, Turkey's first municipal debt issuance in more than 25 years, to resume stalled metro projects. It plans to raise an additional US\$430 million.
- Reverse vending machines, introduced as part of the Zero Waste Project, provide transit top-ups in exchange for recyclable waste. Within a year of launch, it collected more than 4 million plastic bottles and aluminium cans redeemed for ₺180,000 (US\$22,700) worth of IstanbulKart transport credits.



### Service and inclusion

Various passenger-focused initiatives have garnered a positive response; however, transportation still is a major issue for the city, due to high congestion levels and prices, and concerns about safety.

- According to the Istanbul Barometer survey, transportation is among the top three biggest concerns for citizens, almost on a par with poverty and unemployment.
- The already expensive public transport system became even dearer for commuters with a 35 per cent fare hike in 2020. In addition, there was a rise of 11 per cent in taxi fares. Expensive fuel and parking fees make transport even less affordable.
- To improve social inclusion and passenger convenience, the IMM has introduced measures such as 24-hour metro services on weekends, half-price monthly pass rates for students and free public transport rides for mothers with children up to the age of four.

## SUMMARY

Istanbul boasts an array of transport modes across land, rail and sea. The ongoing network expansion projects will play a crucial role in supporting the growing number of commuters in the city. Stable funding and investments are necessary for timely completion of these infrastructure projects. Affordability is another major challenge that needs to be addressed, to ensure sustained use of public transport.

There are several initiatives, either proposed or in place, targeted at increasing technology use and improving sustainability.

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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](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).

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