

MOBILITY ANALYSIS

EMERGING ASPIRING TOP PERFORMER GLOBAL LEADER



Performance and resilience

Congestion	■	■	■	■	■
Public transport reliability	■	■	■	■	■
Transport safety	■	■	■	■	■
Integrated mobility	■	■	■	■	■
Modal diversity	■	■	■	■	■



Vision and leadership

Vision and strategy	■	■	■	■	■
Investment	■	■	■	■	■
Innovation	■	■	■	■	■
Regulatory environment	■	■	■	■	■
Environmental sustainability initiatives	■	■	■	■	■



Service and inclusion

Public transport density	■	■	■	■	■
Transport affordability	■	■	■	■	■
Air quality	■	■	■	■	■
Customer satisfaction	■	■	■	■	■
Accessibility	■	■	■	■	■

KEY MOBILITY STATISTICS

Public transport options*

Commuter rail, light rail including metro, bus, ferry

Monthly public transport pass

NA

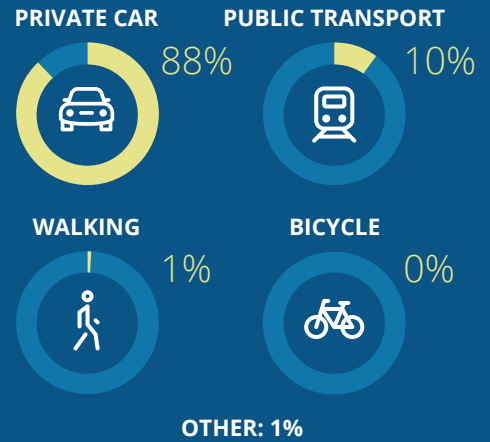
GDP per capita

US\$17,124 (2019)

Principal transport authorities

Transport Agency within the provincial government of DKI Jakarta

JOURNEY MODAL SPLIT



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

FUTURE OF MOBILITY CAPABILITY

Jakarta



STRENGTHS

- Many alternative modes of transport: motorcycle taxis (ojek), mini buses (angkot), and auto rickshaws (bajaj)
- Created the Greater Jakarta Transport Authority as a first step towards a single transport authority across the region; it now needs to be given proper decision-making authority
- Strong funding commitments from bilateral and multilateral aid donors to improve and expand the transport system

CHALLENGES

- Vehicle numbers expanding at faster rate than road capacity, causing persistent congestion
- Public transport use low due to a lack of integration, slow speeds, poor reliability, and high private vehicle ownership
- Inadequate infrastructure for pedestrians, senior citizens, and those with accessibility difficulties

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



Improve intermodal integration within DKI Jakarta and to neighbouring areas



Prioritise and develop infrastructure for BRT and non-motorised transport modes



Implement electronic road pricing (ERP) scheme in a timely manner

MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

Traffic congestion in Jakarta is among the worst in the world, leading to unhealthy air quality caused mainly by vehicle emissions.

- TransJakarta is the world's largest bus rapid transit (BRT) system, serving almost one million passengers per day over a network of 13 corridors. First introduced in 2004, its popularity transformed commuting and has fostered rapid growth since then.
- The popular preference for private car use has resulted in annual growth in vehicle numbers of around 9.5 per cent yet the road network has expanded by less than one per cent. Greater Jakarta is ranked the seventh worst in the world for traffic congestion and is estimated to lose \$4 billion annually from this.
- A range of private sector services have filled the shortfall in public transport provision. Go-jek, which started as ride-hailing for motorcycle taxis, is now Forbes-ranked and Southeast Asia's largest transportation network company (TNC).



Vision and leadership

Tens of billions of dollars in official government assistance have been pledged over the next 10 years to modernise Jakarta's transport system.

- Jakarta's 15.7 km mass rapid transit (MRT) and 5.8 km light rail transit (LRT) began operations in 2019. The LRT line is due for completion in 2022; and a second phase of the MRT line that will extend the line by 7.8 km should be completed in 2024.
- To reduce traffic congestion, the government has committed to implementing an electronic road pricing (ERP) system, similar to Singapore's. However its implementation has been delayed by various legal and regulatory issues.
- TransJakarta is working with the provincial government to deliver the first 100 electric buses on specified routes by the end of 2020. The aim is to have an all-electric fleet by 2030.



Service and inclusion

The government has committed to building better infrastructure for pedestrians and improving air quality through stricter regulations on vehicle use and more environmentally friendly public transport options.

- In 2019 Jakarta's PM2.5 concentration of particulate matter was 49.4 µg/m³, almost five times higher than the WHO PM2.5 target of 10 µg/m³. As part of its air quality improvement plan, the city will run a second low emission zone pilot, to be completed in 2021, and extend its odd-even traffic restrictions.
- The city authorities allocated \$33.3 million in the 2019 budget to renovate sidewalks in the downtown area and aims to redevelop 2,600 km of streets for pedestrians.
- The Greater Jakarta Transportation Agency announced a plan to reintroduce trams by 2029, in anticipation of an increase in the use of public transport and to relieve the existing transport network.

SUMMARY

Jakarta is one of the world's largest and fastest-growing cities. Its transport system has failed to keep up with growth, and a number of steps are now being taken to solve some of the worst problems.

Jakarta is adding new transport modes and aims to achieve a simplified fare payment structure by 2025. The government is also working to improve transport sustainability by promoting car-free days and encouraging the adoption of green vehicles. In the 2020 budget priorities, for investment in transport are directed towards air pollution control, development of rail lines, and production and adoption of EVs. However, the city still needs to tackle peak-hour congestion, enhance public transport coverage and intermodal integration, and enforce stricter traffic and parking laws.

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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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