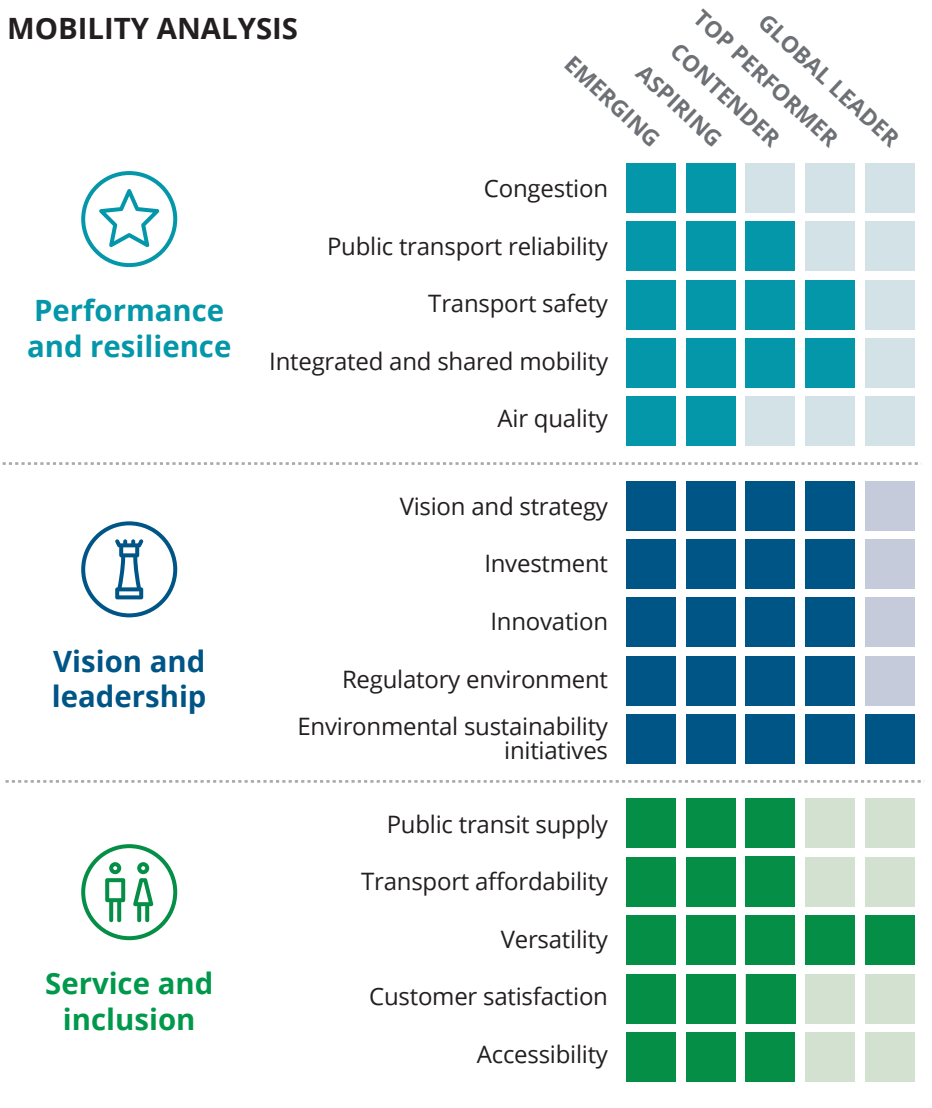


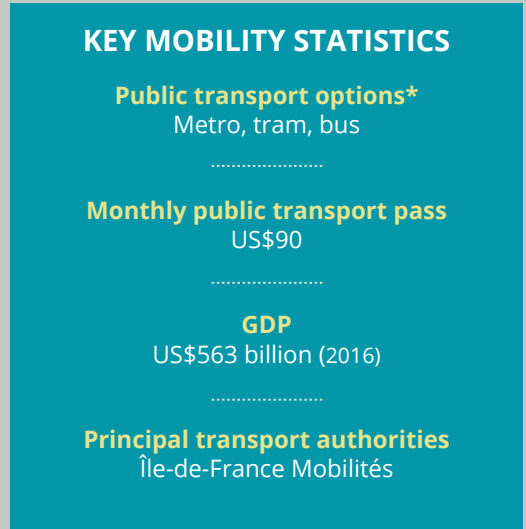


Analysis area

MOBILITY ANALYSIS

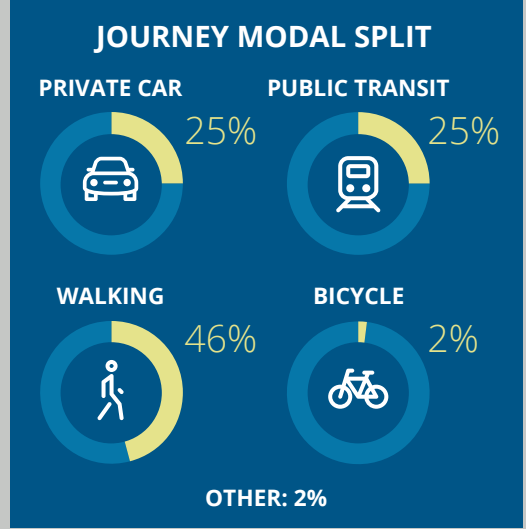


KEY MOBILITY STATISTICS

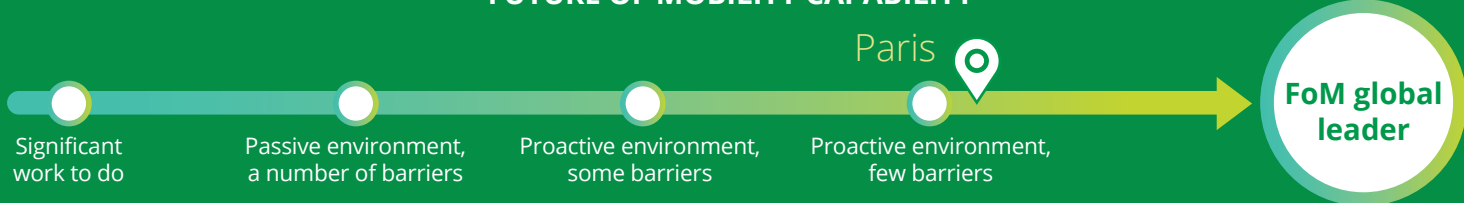


*Regulated, licensed, subsidized, and monitored by principal transport authorities.

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY CAPABILITY



STRENGTHS

- Plans to add electric bus lines, carsharing of electric vehicles (EVs), and to phase out petroleum and diesel vehicles by 2030
- Highly versatile transportation system includes commuter rail, metro, tram, BRTS, and ferry
- New mobility services such as bikesharing and carsharing are actively promoted and supported by transportation authorities

CHALLENGES

- Integration of suburban rail expansion in the Grand Paris Express with urban planning
- High congestion levels in the city, primarily due to gridlock created by the present road layout
- Coverage of public transit options in surrounding regions is patchy

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



Promote and implement mobility-as-a-service (MaaS) solutions



Explore demand management strategies to alleviate congestion



Encourage shift to EVs and natural gas-powered buses to reduce pollution levels

MOBILITY ANALYSIS FURTHER DETAILS:

 **Performance and resilience**

Paris boasts an efficient public transportation system inside the city and is striving to improve accessibility in suburban regions as well.

- Paris has a very efficient city-centric public transport system. However, there are limited options in suburban areas, which are mostly served by buses.
- Paris has one of the largest bikesharing systems, Velib, with a total fleet size of around 20,000. However, due to operational complexities and questions of financial sustainability, the planned expansion has been halted for now and a new operator is being sought.
- To reduce emissions, Paris has set a goal to halve the number of private cars in its city center. Specific plans include pedestrianizing some streets, building a new electric tramway, and increasing bicycle lanes on busy roads.

 **Vision and leadership**

Paris has plans to promote sustainable transport through electric carsharing and EV purchase incentives. The city is also planning to expand metro lines for more intermodal transportation in suburban regions through the Grand Paris Express.

- The world's first fully electric carshare service, Autolib, was launched in Paris. Moreover, all buses are to be zero-emission and zero-noise compliant by 2025, and non-EVs will be banned by 2030; EV purchase incentives are available (up to EUR 10,000/USD 11,500).
- Investment of EUR 26 billion (USD 30 billion) is planned by 2030 to expand metro lines and promote intermodal transportation in suburban regions.
- The city is considering making public transport free to all Parisians in a bid to reduce air pollution and encourage public transport as the primary mode of commuting.

 **Service and inclusion**

The Navigo payment system maintains high customer satisfaction by providing an easy-to-use network, but the city has fair ground to cover in providing accessibility for the disabled and middle- and lower-income groups.

- Navigo enables passengers to pay for both public transport and carshare and bikeshare programs. The integrated public transport network makes interchanges easy and fast.
- There is limited accessibility for people with special needs at metro stations, as only 9 out of 303 metro stations are fully accessible to people who are disabled.
- The well-served city center region has high-income groups. However, the public transport system offers limited reach for the middle- and lower-income groups located in the suburbs.

SUMMARY

Paris has an integrated but city-centered public transport system. With its historical and cultural setting, it has tended to take a cautious approach to infrastructure projects. It is starting to invest heavily in expanding the current network to suburban regions for future events such as the 2024 Olympics.

Paris has been successful in increasing active modes of transportation. With a new metropolitan agency in place, the city is keen to use innovation to solve its transportation challenges. It has been a leader in adopting shared mobility services and is strongly committed to using EVs to address pollution issues. The city has large EV purchase incentives and aims to have zero emission buses by 2020.

CONTACTS

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

Bertrand Boisselier
France Transportation Lead
Partner
Deloitte & Associés
Tel: +33 (0)1 55 61 66 76
Email: bboisselier@deloitte.fr

Maxime Pinto
Public Sector and Transportation
Manager
Deloitte Conseil
Tel : +33 (0) 6 80 72 66 74
Email: maxpinto@deloitte.fr

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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