

Deloitte City Mobility Index

 Paris

Analysis area: 814 km² | Population: 7,200,000 (2016) | Population density: 8,845/km²

Definition of analysis area: Metropolis of Greater Paris (Métropole du Grand Paris)



MOBILITY ANALYSIS



Performance and resilience

GLOBAL LEADER
TOP PERFORMER
CONTENDER
ASPIRING
EMERGING

Congestion	Dark Teal	Medium Teal	Light Grey	Light Grey
Public transport reliability	Dark Teal	Medium Teal	Medium Teal	Light Grey
Transport safety	Dark Teal	Medium Teal	Medium Teal	Medium Teal
Integrated and shared mobility	Dark Teal	Medium Teal	Medium Teal	Medium Teal
Air quality	Dark Teal	Medium Teal	Light Grey	Light Grey



Vision and leadership

Vision and strategy

Investment

Innovation

Regulatory environment

Environmental sustainability initiatives

Public transit supply

Transport affordability

Versatility

Customer satisfaction

Accessibility



Service and inclusion

KEY MOBILITY STATISTICS

Public transport options*

Metro, tram, bus

Monthly public transport pass

US\$90

GDP

US\$563 billion (2016)

Principal transport authorities

Île-de-France Mobilités

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

JOURNEY MODAL SPLIT

PRIVATE CAR

25%



PUBLIC TRANSIT

25%



WALKING

46%



BICYCLE

2%



OTHER: 2%

FUTURE OF MOBILITY CAPABILITY

Paris



FoM global leader

Significant work to do

Passive environment, a number of barriers

Proactive environment, some barriers

Proactive environment, few barriers

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, Vélib, 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.

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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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