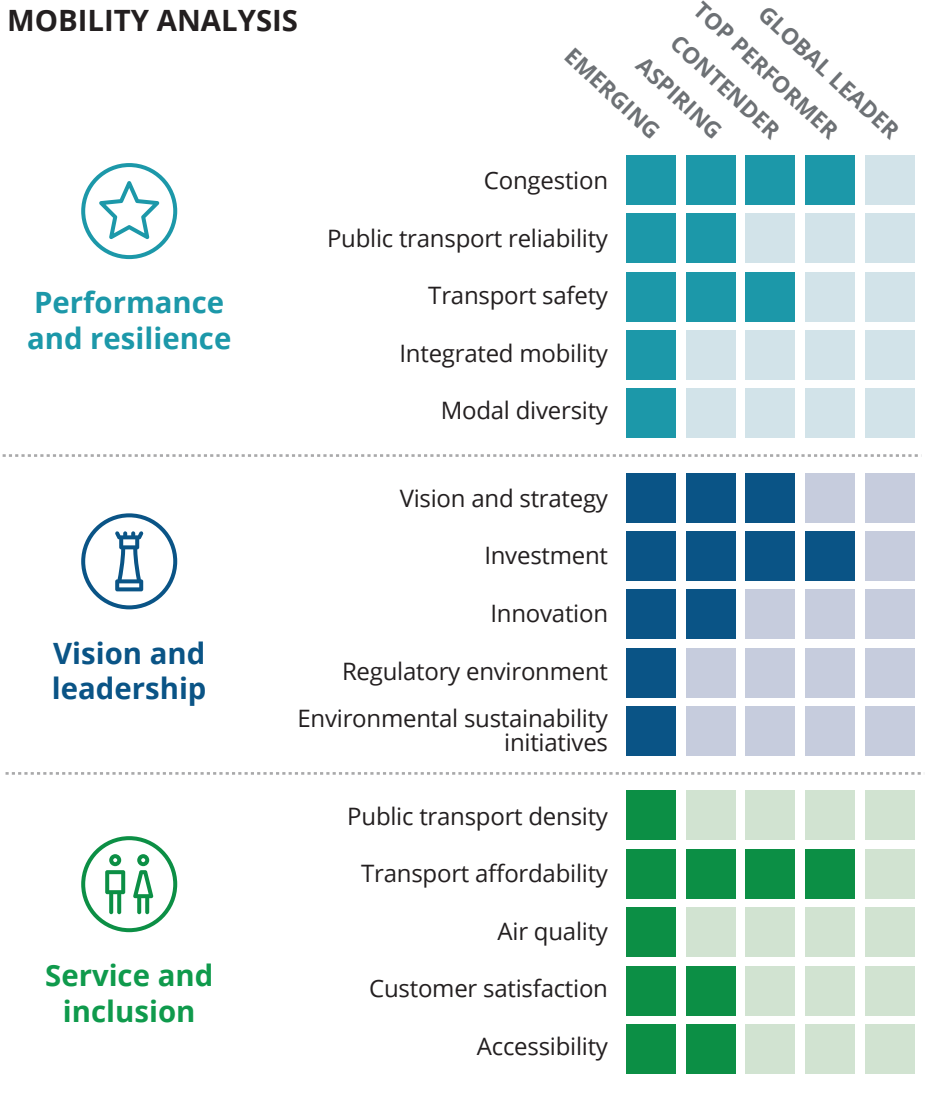
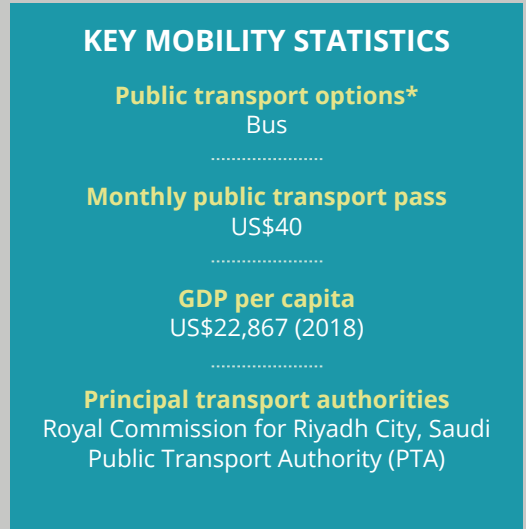


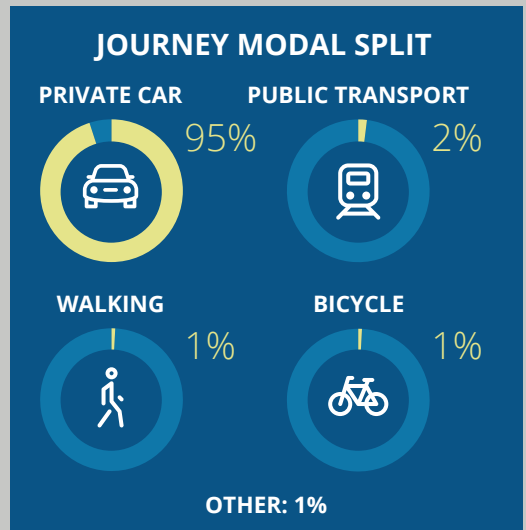
MOBILITY ANALYSIS



KEY MOBILITY STATISTICS

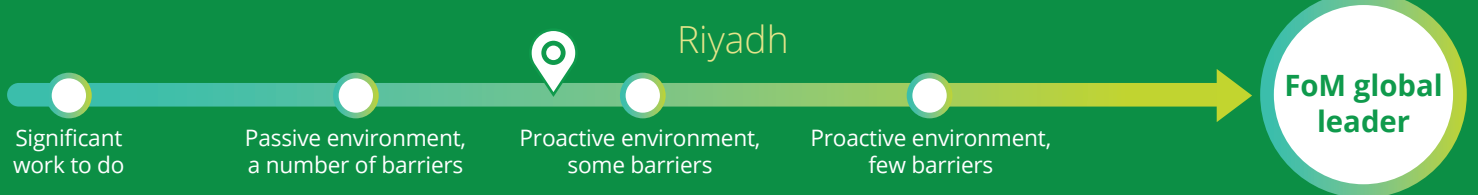


JOURNEY MODAL SPLIT



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

FUTURE OF MOBILITY CAPABILITY



STRENGTHS

- Ambitious plans provide a holistic approach to urban development as part of economic diversification away from primary commodities
- Sustained large-scale investments in developing transport infrastructure, including bus and metro, and park & ride along transport corridors
- Road network is extensive and well maintained

CHALLENGES

- High number of road fatalities due to distracted and reckless driving and lack of safety measures
- The city has no transport app at present and very limited new mobility offerings
- Transport development is top-down and opaque; more transparency would bring more investment

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



Develop publicly-available, real-time open data sets to improve understanding of operations and customer choice



Adopt road tolls and congestion charging to encourage shift to other transport modes



Broader-ranging modernisation programmes should accelerate digitisation across all infrastructure

MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

Riyadh's transport is dominated by road-based modes and traffic safety is poor, due to challenging environmental conditions and aggressive driving. A modern public transport system is about to start operations, which should encourage people to switch to mass modes.

- A national road safety programme commenced in 2018; Riyadh Municipality will install more protective barriers and reflective signs on main roads and at intersections, increase policing and speed cameras, and launch awareness campaigns.
- Portions of the city's new public transport system are due to open in 2020 – when completed, it will have 6 metro lines, 85 stations, 25 park & ride facilities, and an extensive bus system with 6,765 stops that include 22 bus rapid transit (BRT) lines.
- Riyadh needs to develop a modern, integrated ticketing and payments system that integrates all modes and connects to the inter-city bus and rail lines.



Vision and leadership

The city's long-term integrated urban plan, MEDSTAR 2030, is part of the countrywide Vision 2030 strategy.

- Vision 2030 includes four grand place-making projects in Riyadh: King Salman Park, Sports Boulevard, Green Riyadh and Riyadh Art around the new metro stations. Its urban forestation initiative 'Green Riyadh' will increase the per capita share of green space to 545 km², 9 per cent of the total city area, by planting 7.5 million trees. This should improve air quality and reduce temperatures, which will facilitate the uptake of more active transport modes.
- The city's open data sets tend to be historical and not in real time. More up-to-the-minute data will increase the understanding of transport performance, which should benefit users and system operators alike.
- City plans do not include a switch away from the internal combustion engine to cleaner, greener vehicles.



Service and inclusion

The arrival of the modern transport network will increase accessibility. The city's transport authorities seek to keep fares affordable for lower-income users, who are the main users of public transport.

- Transport is affordable in Riyadh, due to the low price of petrol, parking and taxi rides. The PTA plans to regulate public transport fares for short trips to keep the cost of commutes below 5 per cent of a family's average daily income.
- Riyadh's air quality is poor, ranking 13 (out of 3,515 cities) in the WHO PM10 data, 16 times above the sanctioned maximum. This should improve with the Green Riyadh programme and also a reduction in car use due to the launch of new mass transport modes.
- A monorail is planned for the financial district, although the delivery date is unclear.

SUMMARY

2020 looks set to be a big year for Riyadh's public transport network with the opening of one of the largest new public transport systems in the region. This is urgently needed: Riyadh is a fast-growing city with a population that is expected to reach 8.3 million by 2030, and public transport can help improve the poor air quality and reduce congestion on the roads.

The city also must do more to improve road safety initiatives. Riyadh accounts for around a quarter of all traffic accidents in the Kingdom despite having just over one-fifth of the country's population. Better infrastructure and traffic calming measures can contribute to a reduction in fatalities, but these should be part of a package that includes stricter enforcement of the rules and more driver education.

CONTACTS

Simon Dixon

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

Tarek Nahle

Middle East Transport lead
Partner
Deloitte & Touche (M.E.)
Tel: +971 561 226 373
Email: tnahle@deloitte.com

Neal Beevers

Government and Public Sector
Partner
Deloitte & Touche (M.E.)
Tel: +966 (0) 53 510 4202
Email: nebeevers@deloitte.com

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.

About this publication

This publication has been written in general terms and we recommend that you obtain professional advice before acting or refraining from action on any of the contents of this publication. Deloitte LLP accepts no liability for any loss occasioned to any person acting or refraining from action as a result of any material in this publication.

About Deloitte

Deloitte LLP is a limited liability partnership registered in England and Wales with registered number OC303675 and its registered office at 1 New Street Square, London EC4A 3HQ, United Kingdom.

Deloitte LLP is the United Kingdom affiliate of Deloitte NSE LLP, a member firm of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"). DTTL and each of its member firms are legally separate and independent entities. DTTL and Deloitte NSE LLP do not provide services to clients. Please see www.deloitte.com/about to learn about our global network of member firms.

© 2020 Deloitte LLP. All rights reserved.