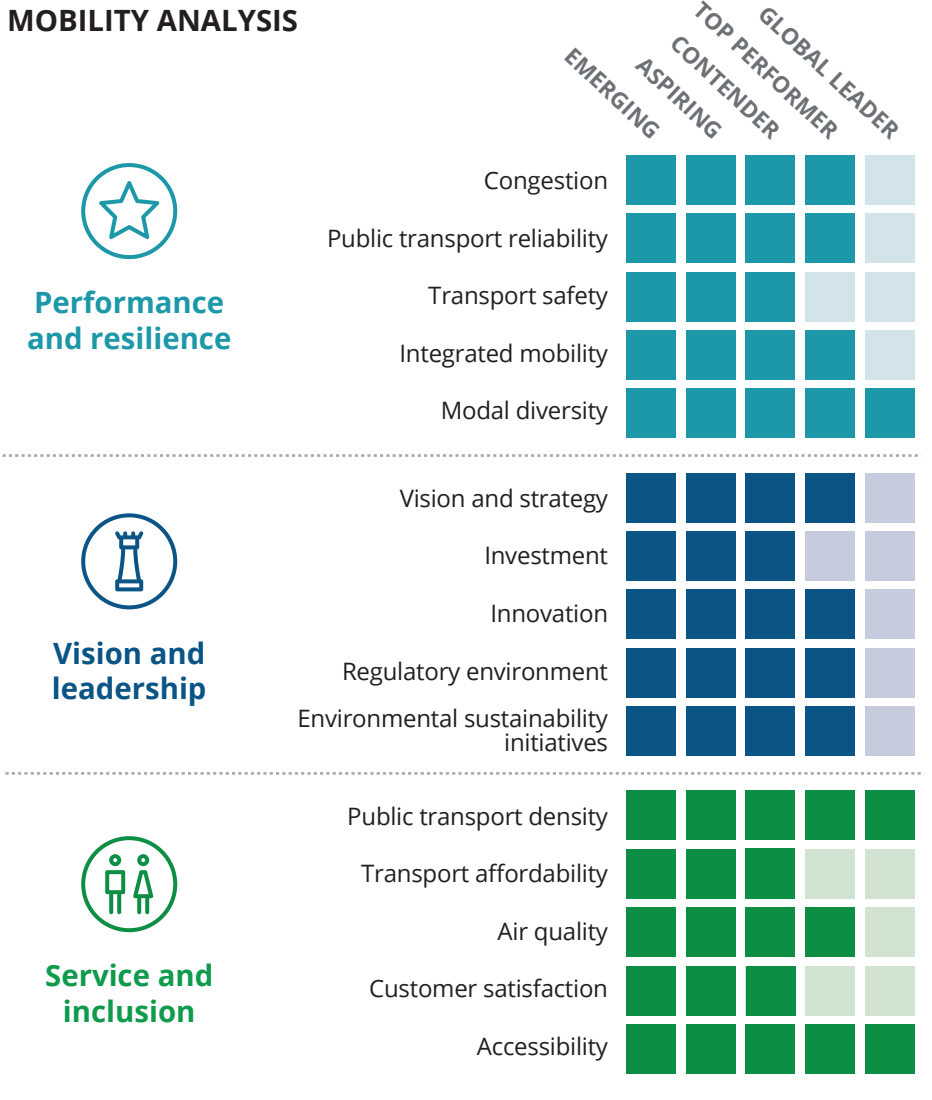


MOBILITY ANALYSIS



KEY MOBILITY STATISTICS

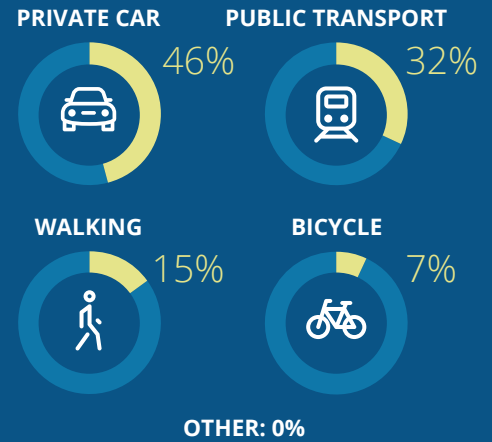
Public transport options*
Commuter rail, light rail including metro and tram, bus, bike, ferry

Monthly public transport pass
US\$95

GDP per capita
US\$72,803 (SEK647,000) (2018)

Principal transport authorities
Storstockholms Lokaltrafik (SL)

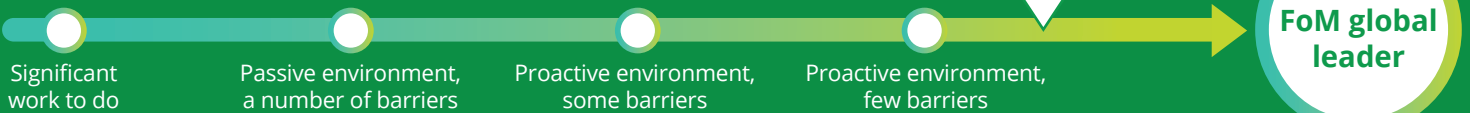
JOURNEY MODAL SPLIT



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

FUTURE OF MOBILITY CAPABILITY

Stockholm



STRENGTHS

- A detailed policy vision is backed up by high levels of investment in public transport infrastructure
- The city is forward-looking when it comes to adoption of technology and environmental sustainability initiatives
- The urban area is well covered by a range of transport modes

CHALLENGES

- The modern and extensive system is not cheap: costs for passengers increase regularly through toll and travel pass price increases
- Growth in cycling has created competition between motorised and non-motorised travellers for limited street space
- Rapidly growing population centres in the outer suburbs mean that transport supply will struggle to keep up with demand

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



MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

Stockholm has a variety of transport modes in its efficient and modern public transport system.

- Stockholm is currently upgrading its payment system. In 2019 the SL app was enabled to make payments, and contactless payments will be introduced from late 2020 and made more widespread through 2021.
- The city has run a Mobility-as-a-Service pilot with the national energy, transport and innovation agencies. As part of reforms for a combined mobility solution, third-party sales of public transport tickets are allowed, and data for more than 90 per cent of public transport journeys are made available.
- Between 2012 and 2022 the city is investing SEK2 billion (US\$218 million) in accessible bike infrastructure. The goal is make it easier to go by bicycle than by car, and to have at least 15 per cent of rush-hour commuters travelling by bike by 2030.



Vision and leadership

Stockholm is undertaking large infrastructure projects to create an extensive and sustainable public transport system.

- The largest expansion in the metro and tram networks in 40 years is currently in progress at a cost of SEK30 bn (US\$3.4 bn). A total of 46 new stations and 60 km of rail infrastructure is under construction and due to be completed by 2026.
- SL has been piloting a number of small predictive maintenance projects. Since 2018 a new AI predictive maintenance system has been tested on the Roslagsbanan light railway line, and in 2019 new vehicles on the Tunnelbana 2 metro line were equipped with an intelligent communication system.
- All land-based public transport is powered by bio fuels or electricity generated from solar, wind or hydropower. Boat traffic, a small part of the public transport system, will be 90 per cent fossil fuel-free by 2021 and completely fossil fuel-free by 2030.



Service and inclusion

Stockholm enjoys a highly accessible public transport system with good coverage throughout the urban area.

- The city's public transport system is fully accessible for passengers with reduced mobility. There are high levels of customer satisfaction with service reliability and punctuality.
- Stockholm has seen improved levels of NO2 and PM10 since measurements began in the 1980s. In 2019, forecast data for air quality was made available at the city block level for active travellers to plan routes that bypass areas with high pollution.
- Public transport fares increased by SEK40 (US\$4) in January 2020, and annual increases will continue through 2022. These, and the levies raised through congestion charges, offset some of the costs of the metro expansion.

SUMMARY

Stockholm offers a high-quality public transport system thanks to its extensive coverage, a variety of modes on offer and high levels of accessibility. The city has introduced a number of initiatives to reduce transport sector emissions by 43 per cent and become fossil fuel-free by 2040, with higher taxes on new internal combustion engine vehicles and a range of incentives for electric vehicle purchases. It has also built an ecosystem that is conducive to the adoption of autonomous vehicles (AVs), introducing a driverless bus service in 2018 and targeting deployment of Level 4 AVs by 2022. It is currently making substantial investments in its metro system, the first major upgrade since the 1970s.

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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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