Warsaw

MOBILITY ANALYSIS

Performance and resilience

- Congestion
- Public transport reliability
- Transport safety
- Integrated and shared mobility
- Air quality

Vision and leadership

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

Service and inclusion

- Public transit supply
- Transport affordability
- Versatility
- Customer satisfaction
- Accessibility

KEY MOBILITY STATISTICS

- **Public transport options**: Metro, bus, light rail, tram, commuter train, bicycle
- **Monthly public transport pass**: US$32
- **GDP**: US$141 billion (2014)

Principal transport authorities
Zarząd Transportu Miejskiego (ZTM), Warsaw City Council

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

FUTURE OF MOBILITY CAPABILITY

Warsaw

- **Significant work to do**: Passive environment, a number of barriers
- **Proactive environment, some barriers**: Proactive environment, few barriers

STRENGTHS

- The city’s park-and-ride system decreases on-road parking and increases public transport use; its bikesharing system, Veturilo, was adopted quickly and is growing
- The recently formed Warsaw Public Transport Council aims to enhance collaboration among stakeholders, including urban planners, citizens, and operators
- Dense public transport network and multiple options in the city area, which encourage multimodal journeys

CHALLENGES

- Increasing car ownership with limited road space leads to high peak-hour congestion
- Integrating public transport throughout the entire Warsaw Metropolitan Area to improve coverage
- Defining steps to transition to a 25 percent electric bus fleet by 2030 to improve air quality
Warsaw faces high congestion and low air quality due to increased levels of car ownership. Solutions include new shared mobility models and temporary free public transport days.

- Warsaw’s city area still experiences congestion despite initiatives to reduce it, such as park-and-ride efforts and a smart parking pilot. The authorities should explore novel approaches, including congestion charging and limiting new registrations.
- The government has experimented with free public transport days to deal with poor air quality. The region needs to adopt stringent longer-term measures, such as phasing out high-emission vehicles.
- Plans are in place to introduce an integrated smart card that covers all modes of public transport, parking, and other municipal services. It will replace plastic/cardboard tickets with a single passenger/citizen account.

MOBILITY ANALYSIS FURTHER DETAILS:

**Performance and resilience**

Warsaw’s vision includes using open data to build new transport solutions. It is also redesigning its urban infrastructure to increase cycling and walking.

- The extensive use of open data has led to innovative new startups focused on identifying public transport routes in case of disruptions. Other startups focus on congestion forecasting and smart parking pilots, which could be scaled to improve transport reliability.
- The Polish government recently introduced a bill to legalize testing of self-driving vehicles. The Warsaw Municipal Bus Company plans to make 33 percent of its bus fleet electric by 2020.
- Warsaw is creating more pedestrian- and cycling-friendly spaces. It has invested US$1.8 million in a new bridge over the Vistula River, thus linking the Powiśle and Praga districts.

**Vision and leadership**

Warsaw is expanding its public transport supply and has adopted digital measures to increase accessibility and customer satisfaction.

- Further expansions of the Metro Line II linking the eastern and western parts of the city will enhance the already extensive public transport supply with additional options.
- Customer satisfaction has consistently been above 70 percent since 2012, and the metro and trams use accurate digital displays. Similar measures can be adopted for buses serving the peripheral regions to increase ridership and customer satisfaction.
- The city council has installed a network of microtransmitters that, once connected with smartphones, will help visually impaired citizens navigate the system. The entire bus fleet is disabled-friendly, and the metro has elevators and in-station support.

**Service and inclusion**

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SUMMARY

To realize its vision of future mobility, Warsaw is using open data to facilitate new transport solutions that will help maintain public transport reliability and improve accessibility for the disabled. It has also started to increase electrification of the bus fleet, is redesigning urban infrastructure, and is using shared mobility models. Yet car ownership has been increasing, leading to road congestion and low air quality. The city needs to reenergize its efforts to convert car trips, presently occupying a 32 percent modal share, into active modes of transport. Municipalities do not currently impose congestion charging, but local governments are lobbying for its implementation.

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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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