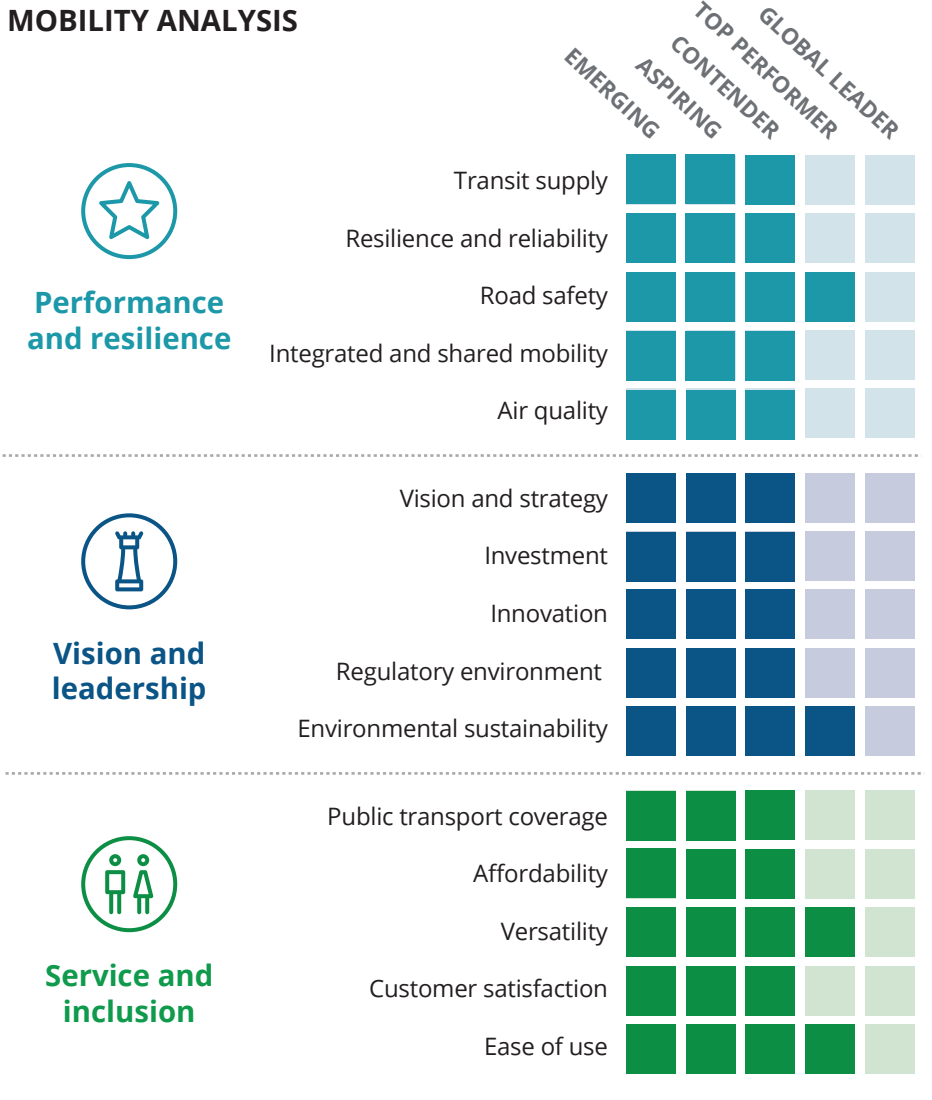


Analysis area

Analysis area: 242 km² | Population: 1,258,425 (2016) | Population density: 5,200/km²

Definition of analysis area: Brussels-Capital Region (19 municipals) and 11 suburban municipals as served by primary transport agency STIB

MOBILITY ANALYSIS



KEY MOBILITY STATISTICS

Metro, bus, tram, train
Public transit options

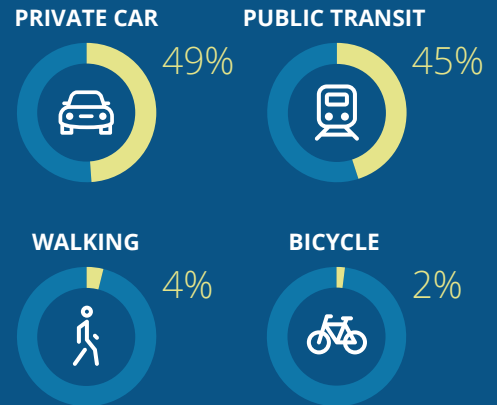
41 hours/year
Time spent in congestion

\$65 Average public transit pass/month
\$113 billion GDP (Est. as of 2014)

Major transit authority
Brussels Intercommunal Transport Company (STIB)
(Other transit agencies: SNCB, TEC, De Lijn)

Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY ANALYSIS



STRENGTHS

- Increasing alignment among stakeholders on the need for change in mobility, with momentum building across public- and private-sector players
- Growth of shared mobility players seeking to address some of the key mobility challenges
- An existing multimodal network with all forms of public transport represented (tram, bus, metro, train, and bicycle)

CHALLENGES

- Belgium is a small country that facilitates a private car commuting culture
- Challenge in changing public behavior, given the prevalence of company cars
- With multiple municipal authorities and public transport agencies, Belgium's complex governmental and institutional framework hinders the development of a coherent strategy

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



Explore shared hire schemes and reduce incentives to supply company cars to reduce congestion



Expand public transit network coverage and improve intermodal connectivity between different regions, especially in city outskirts



Harness data and use of analytics to implement real-time traffic and demand management

MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

Brussels has a well-developed public transit network. However, insufficient coverage leads to high use of cars, increased traffic congestion and reduced air quality.

- Combined with limited coverage especially in city outskirts and disjointed intermodal connectivity between different regions, public transit performance has scope for improvement.
- High traffic congestion and low air quality: Brussels has higher levels of traffic congestion (private cars account for 49 percent of the modal share) than many comparable European cities, which contributes to poor air quality.
- Reducing cars on streets: The Ministry of Mobility and Public Works plans to create more public space for pedestrians and a network of bicycle lanes and increase car-free zones.



Vision and leadership

Having multiple stakeholders has hindered progress but public and private players are increasingly cooperating to address challenges. This is a step forward in the adoption of Future of Mobility solutions.

- No centralized authority: With complex institutional framework and a range of transportation stakeholders across multiple municipal authorities, developing a consolidated and coherent mobility plan has historically been difficult.
- A greener mobility landscape: The "Iris-II" and "Bedrijfsvoerplannen" plans are geared toward changing employee behavior from using company cars to embracing new mobility offerings.
- More mobility start-ups: Brussels has witnessed a rise in shared mobility start-ups focused on carsharing and bikesharing.



Service and inclusion

While Brussels's public transit system does moderately well in terms of ease of use and accessibility, it needs to focus on integrating ticketing options across different modes of transport.

- Ease of use: One of the main public transit authorities, STIB, provides integrated ticketing and payment options, making it easy for people to use public transport. However, the ticketing options are not integrated across the urban region with all the other transit authorities present in the area.
- Geographical spread: Across Belgium, citizens prefer to commute in private cars. (Of the 350,000 people commuting into Brussels every day, more than 200,000 drive.)
- Focus on inclusion: Brussels has an accessibility plan across all modes of transport for people with disabilities.

SUMMARY

Despite numerous modes of transportation, Brussels can still improve public transit coverage, especially in the city outskirts, along with intermodal connectivity. Most people prefer to commute in private cars, which affects traffic congestion and air quality in the urban region in and around the city.

The city is witnessing a rise in shared mobility start-ups. The government is also making efforts to reduce company car usage and move towards other mobility solutions. However, the involvement of multiple stakeholders and the complexity of an institutional framework slow the pace of development. The city would benefit from more focus on mobility solutions and collaboration with private players to solve transportation problems and accelerate the adoption process.

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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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