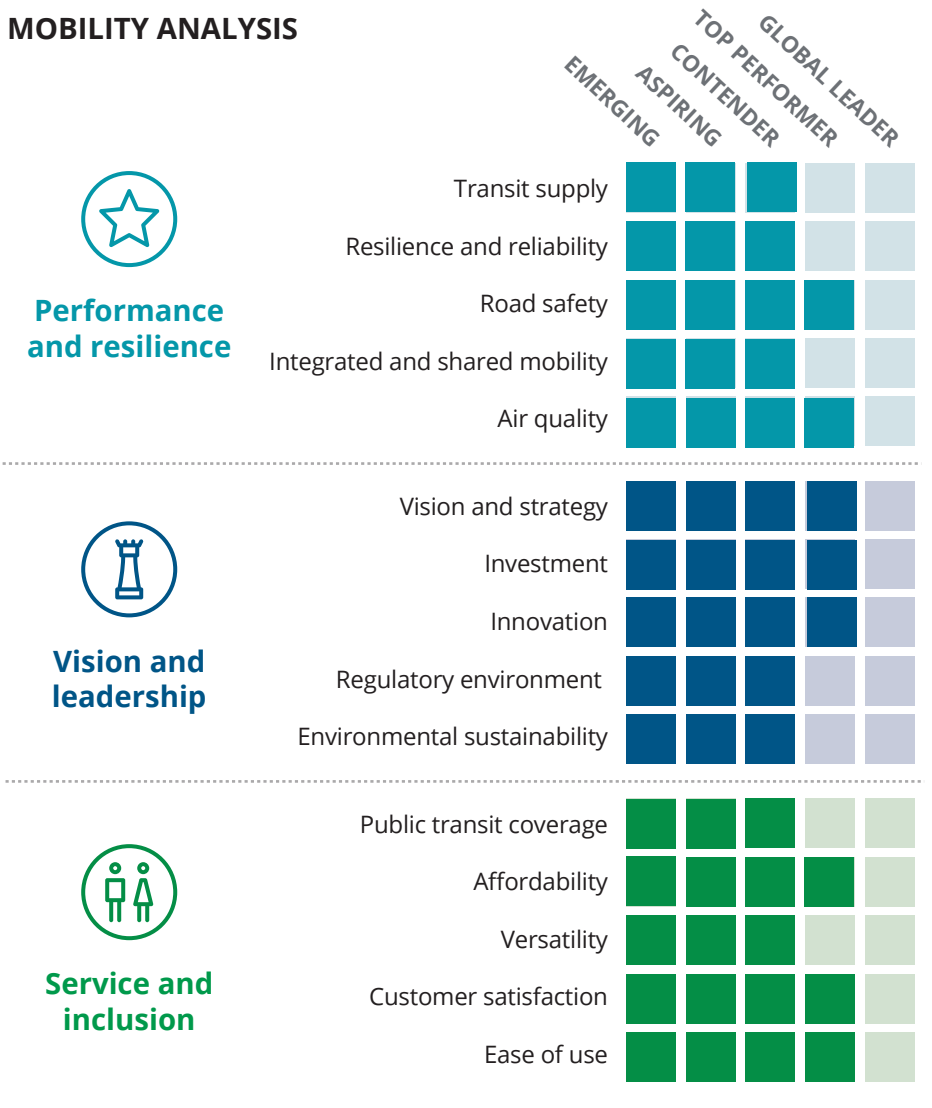
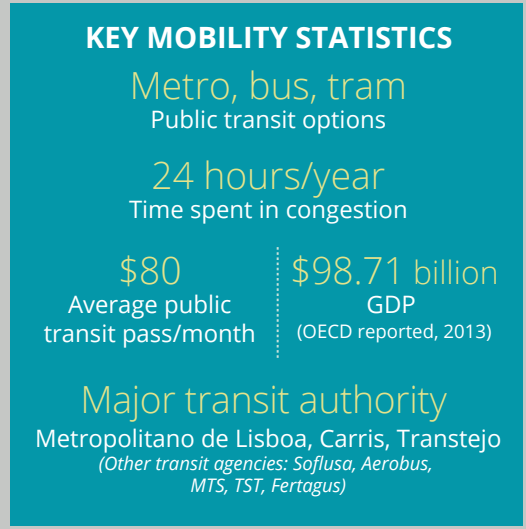


### MOBILITY ANALYSIS

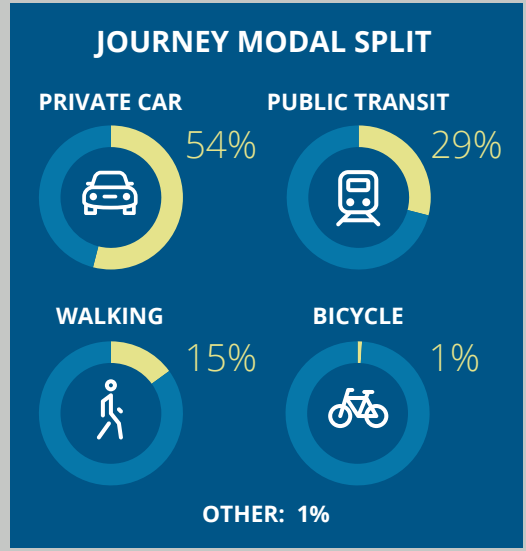


### KEY MOBILITY STATISTICS



Note: All dollar amounts are in USD.

### JOURNEY MODAL SPLIT



### FUTURE OF MOBILITY ANALYSIS



#### STRENGTHS

- Open data portal and strong link to Smart City initiatives using data analytics
- Test bed for a variety of mobility and Smart City services
- A number of sustainability initiatives to safeguard the environment

#### CHALLENGES

- Physical layout and narrow roads can lead to traffic snarls and operational difficulties for city trams
- Absence of clear regulatory stance may hinder new development and their deployment
- Public transit coverage is not currently universal and accessibility is poor for certain groups

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



Simplify legal structure to attract more innovative start-ups and alternative business models



Increase length of public transit coverage across the metropolitan region in collaboration with private players



Continue to expand use of data analytics to promote demand management and mode-sharing

## MOBILITY ANALYSIS FURTHER DETAILS:



### Performance and resilience

Lisbon has high air quality but lags behind other cities in road safety, despite its widely integrated transportation system.

- Air quality: Lisbon performed well in its annual carbon dioxide emission scores (< 3 million tons); as a global C40 participant, it has made adaptations to improve eco-efficiency.
- Public transportation: Lisbon's public transit network comprises buses, trams, lifts, and metros that cover the entire city.
- Private transport: With a high share of private vehicle journeys (54 percent), Lisbon is one of the most challenging cities to drive in because of its narrow, hilly roads, inadequate signage, and limited parking spaces. These factors result in traffic congestion and road accidents.



### Vision and leadership

From 2020 to 2050, Lisbon will plan and implement programs to increase active modes of transport and modernize public transit systems.

- Lisbon will develop pedestrian areas and shared public spaces and extend bicycle lanes. It has launched awareness campaigns to communicate the benefits of walking and cycling.
- Lisbon is installing EV charging points to enable better integration of EVs in the public transport system. Other initiatives include acquisition of EVs by municipal and service operators, launch of electric cargo-bikes, and installation of free Wi-Fi in public transit.
- Lisbon is building car parks on the city premises near transport stations, with monthly fees integrated with public transit, to avoid private cars from entering the city. Also cargo lorries of larger dimensions will be forbidden to enter the city during work hours.



### Service and inclusion

Lisbon scores well on affordability and ease of use, due to its high average income and a versatile public transit network; however security is an issue.

- Public transit accessibility: Of its 56 metro stations, only 36 are 100 percent accessible. Lisbon plans to make all stations fully accessible, which would make it a leader in this category.
- Integrated payment system: To make payments quickly and easily, the city provides a "zapping" system for its daily metro and bus passengers.
- The public transit system has a dedicated police force and is, for the most part, safe. However, the system is vulnerable to crimes, such as theft, during peak hours.

## SUMMARY

Since 2011, Lisbon's urban development and economic growth have spurred a rise in real estate investment, tourism, and entrepreneurship. But the increase in construction has placed an added burden on its transport system, resulting in illegal parking and traffic conflicts. With high dependency on private cars, narrow roads, and hilly terrain, Lisbon is a very congested city.

Nonetheless, the overall transportation scenario in Lisbon is improving, thanks to the city council's strong vision. Concerned about its aging urban population (30 percent are 65 or older), the council is investing €2 million on improvements to the pedestrian infrastructure to provide better walking conditions for all. The council also plans to double the length of bicycle routes and promote active mobility to reduce traffic congestion, emissions, and improve the health and well-being of citizens.

## CONTACTS

### Simon Dixon

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

### Haris Irshad

Strategy & Operations  
Senior manager  
Deloitte MCS Limited  
Tel: +44 7879 487623  
Email: [hirshad@deloitte.co.uk](mailto:hirshad@deloitte.co.uk)

### Rui Manuel Gidro

Strategy & Operations  
Partner  
Tel: +351 933259269  
Email: [rgidro@deloitte.pt](mailto:rgidro@deloitte.pt)

### 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](https://deloitte.com/insights/mobility-index).

For Deloitte's insights on the Future of Mobility, visit [deloitte.com/insights/future-of-mobility](https://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 MCS Limited 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 MCS Limited is registered in England and Wales with registered number 03311052 and its registered office at Hill House, 1 Little New Street, London, EC4A 3TR, United Kingdom.

Deloitte MCS Limited is a subsidiary of Deloitte LLP, which is the United Kingdom affiliate of Deloitte NWE LLP, a member firm of Deloitte Touche

Tohmatu 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 NWE LLP do not provide services to clients. Please see [www.deloitte.com/about](https://www.deloitte.com/about) to learn more about our global network of member firms.

© 2018 Deloitte MCS Limited. All rights reserved.