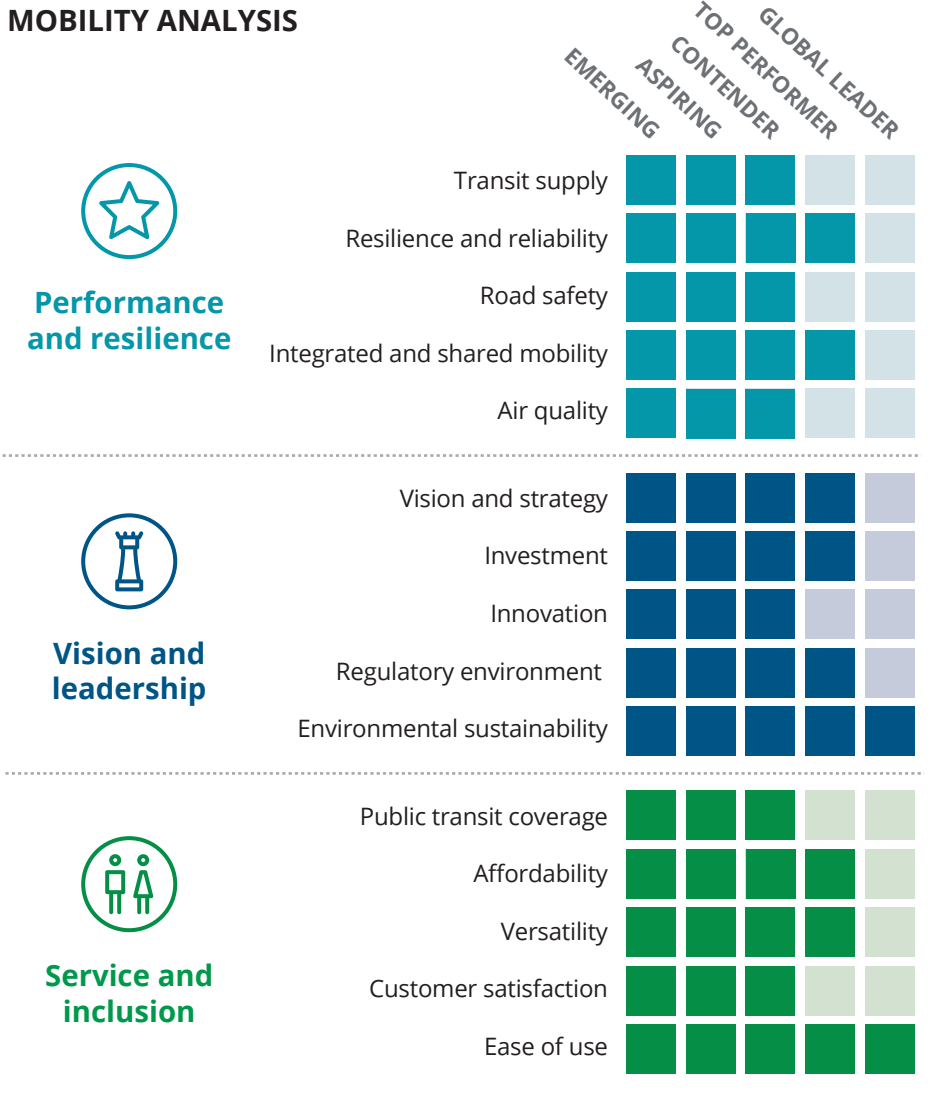


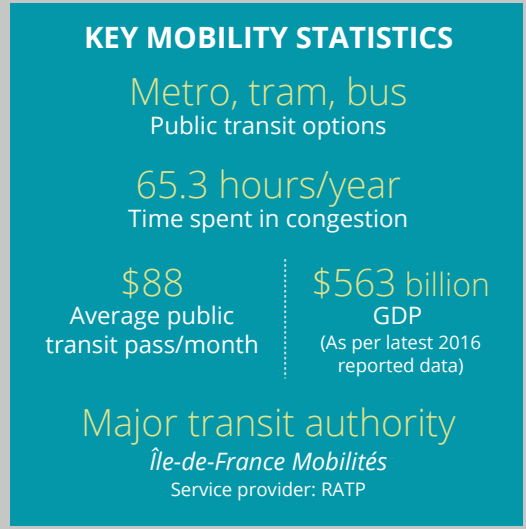


Analysis area

MOBILITY ANALYSIS

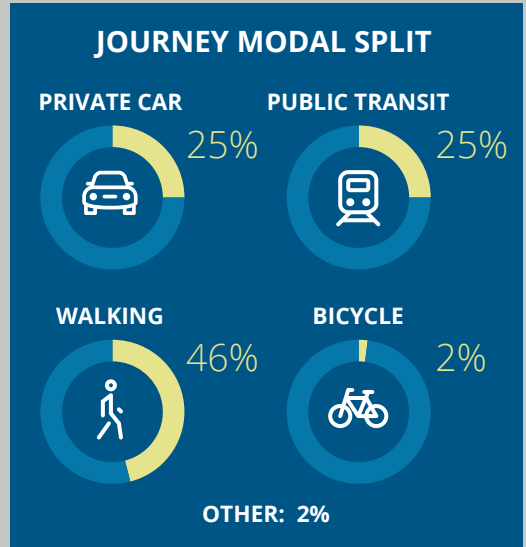


KEY MOBILITY STATISTICS



Note: All dollar amounts are in USD.

JOURNEY MODAL SPLIT



FUTURE OF MOBILITY ANALYSIS



STRENGTHS

- Electric bus lines, electric carsharing plans, and plans to phase out petroleum and diesel vehicles by 2030
- New mobility services such as bikesharing and carsharing fostered by transportation authorities
- Smart card covering major transit service providers

CHALLENGES

- Integration of Grand Paris Express with urban planning
- Expansion of public transit options in surrounding out-of-city regions
- Higher congestion levels in the city, primarily due to gridlock created by the present road network

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



MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

Paris boasts of an efficient public transportation system inside the city and is striding toward improving the accessibility in suburban regions as well.

- Efficient public transportation: Paris has a very efficient city-centric public transit system. However, suburban regions are mostly served by buses.
- Largest bikeshare system in the world outside of China: With a total fleet size of around 20,000, Velib is the largest bikeshare system in our sample.
- Air quality: Paris has made it mandatory for drivers to display anti-pollution stickers in their vehicles in an attempt to fight against poor air quality.



Vision and leadership

Leader in innovative self-service sharing systems like Velib and Autolib for bikes and electric vehicles (EVs) to improve mobility and combat pollution and congestion.

- Combating pollution: To reduce emissions, Paris has set a goal to halve the number of private cars in its city center. Specific plans include pedestrianizing some streets, building a new electric tramway, and increasing bicycle lanes on busy roads.
- Strong commitment to electrification: The world's first fully electric carshare service, Autolib, was launched in Paris. Moreover, all buses are to be zero-emission and zero-noise compliant by 2025, and non-EV banned by 2030; EV purchase incentives are available (up to \$11,000).
- Strong investment plans for public transit: Investment of €26 billion by 2030 in Grand Paris Express to expand metro lines and promote intermodal transportation in suburban regions.



Service and inclusion

The Navigo payment system maintains high customer satisfaction by providing an easy-to-use network, but the city has fair ground to cover in providing accessibility for the disabled and middle- and lower-income groups.

- Versatile and user-friendly network: Navigo enables passengers to pay for both public transit as well as carshare and bikeshare programs. The integrated public transit network makes interchanges easy and fast.
- Limited accessibility infrastructure for people with special needs at metro stations: Only 9 out of 303 metro stations are fully accessible to people who are disabled.
- Need for inclusive public transport options for lower- and middle-income groups: The well-served city center region has high-income groups. However, the public transit system offers limited reach for the middle- and lower-income groups located in the suburbs.

SUMMARY

Paris has an integrated but city-centered public transit system. With its historical and cultural setting, the city has tended to take a cautious approach to infrastructure projects. However, keeping in mind the future global events such as 2024 Olympics, the city has started to invest heavily in expanding its current public transit network. In addition, Paris has been successful in not just promoting but increasing the usage of active modes of transportation.

With a new metropolitan agency in place, the city is keen to use innovation to solve its transportation challenges. It has been a leader in adopting shared mobility services and is strongly committed to using EVs to address pollution issues. The city aims to have zero emission buses by 2020, and large EV purchase incentives.

CONTACTS

Simon Dixon

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

Haris Irshad

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

Arnaud Molinie

Partner and Communications & Brand director
Deloitte SAS
Tel: +33 06 72 05 44 97
Email: amolinie@deloitte.fr

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 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 to learn more about our global network of member firms.

© 2018 Deloitte MCS Limited. All rights reserved.