

MOBILITY ANALYSIS

EMERGING ASPIRING TOP PERFORMER GLOBAL LEADER



Performance and resilience

Congestion	■	■	■	■	■
Public transport reliability	■	■	■	■	■
Transport safety	■	■	■	■	■
Integrated mobility	■	■	■	■	■
Modal diversity	■	■	■	■	■



Vision and leadership

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



Service and inclusion

Public transport density	■	■	■	■	■
Transport affordability	■	■	■	■	■
Air quality	■	■	■	■	■
Customer satisfaction	■	■	■	■	■
Accessibility	■	■	■	■	■

KEY MOBILITY STATISTICS

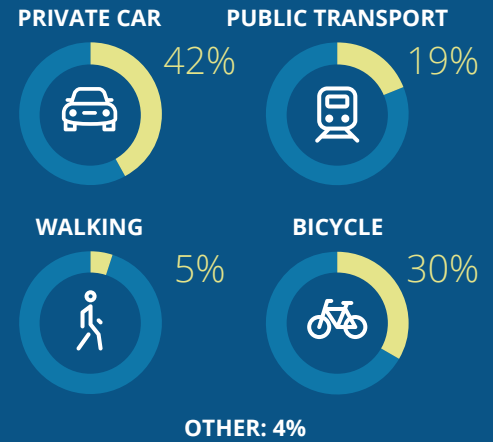
Public transport options*
Bus, commuter rail, light rail including tram and metro, ferry

Monthly public transport pass
US\$104

GDP per capita
US\$38,428 (2017)

Principal transport authorities
Transport Authority Amsterdam (Vervoerregio Amsterdam) (VVA)

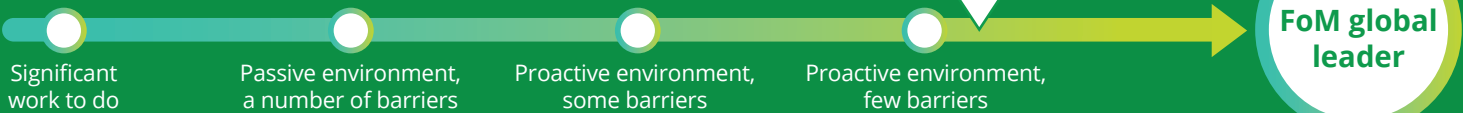
JOURNEY MODAL SPLIT



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

FUTURE OF MOBILITY CAPABILITY

Amsterdam



STRENGTHS

- Coordination between government, businesses and knowledge sectors improves innovation and public acceptance of new plans
- Responsive approach by the authorities ensures that provision of electric vehicle charging infrastructure keeps up with demand
- Fully integrated cashless ticketing system covers all modes of public transport

CHALLENGES

- Continuing growth of the city and large tourist numbers mean that public transport capacity struggles to keep up with demand
- Increasing traffic volumes and mixed modes on city streets contribute to more accidents
- With the expansion of residential areas to city outskirts, transport modes for shorter trips, such as trams or bikes, are inadequate for longer travel distances

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



Seek ways to incorporate newer, disruptive modes of transport into the well-functioning public network



Integrate mobility services with real estate development



Improve the public transport system to nudge people into using it, and introduce dynamic pricing to reduce car use

MOBILITY ANALYSIS FURTHER DETAILS:



Performance and resilience

The city is taking steps to reduce dependence on cars and traffic congestion, and improve air quality.

- The 2019 'Car-less Agenda' has 27 measures, including a limit to parking permits, removing 10,000 parking spaces, longer public transport operating hours, restricting through traffic, and a 30km/hour driving speed limit for cars.
- The North-South metro line, opened in 2018 at a cost of €3.1 billion (US\$2.8 billion), can run end-to-end in as little as 15 minutes and its nine stations connect variously to the train, metro and tram lines.
- The authorities are improving the infrastructure for bicycles, redesigning major intersections to make them safer, widening cycle lanes, and introducing more low-speed cycle streets.



Vision and leadership

The government has been responsive and innovative in addressing the various transport issues affecting the city now and in the future.

- As part of the plan to achieve zero emissions by 2025, the city will deploy smart electric charging networks that provide renewable energy from local households, introduce 31 battery-powered buses into its fleet in 2020, and restrict non-zero emission cars from driving in the city centre.
- To increase the use of public transport in the city, the government is encouraging private sector employers to provide employees with personal mobility budgets instead of leased cars.
- The city has been cracking down on the prevalence of dockless bikes in order to keep public spaces free of hazards, and to encourage use of the city-licensed sharing schemes.



Service and inclusion

The metropolitan region is one of the fastest growing in Europe. It has expanded continuously since 2013, adding around 50,000 jobs annually in the past two years.

- The city has one of the most expensive public transport systems in Europe; this could have a negative financial impact on people moving to the outskirts of Amsterdam and commuting longer distances to work.
- The government has committed €237 million to making Schiphol Airport a multi-modal hub by 2025, handling over 120,000 passengers per day. This will require more train and bus lines, including high-speed rail services and possibly an expansion of the North-South metro line.
- Much of the city's 'Car-less Agenda' consists of subsidising free travel for under-12s at weekends and on other specified days, and expanding the bicycle and pedestrian infrastructure. Estimates of cost are between €500 million and €700 million to 2025.

SUMMARY

Amsterdam's proactive governance model makes it a testing ground for a variety of smart mobility solutions. The authorities have moved quickly to install an EV charging infrastructure in line with demand, introduce electric buses, and promote public transport and shared mobility in the city centre.

However, the city's economic expansion and its popularity as a tourist destination – attracting more than 19 million visitors per year – means that it needs to create more mobility hubs. Schiphol and Centraal Station do not have sufficient capacity to handle the large numbers of people coming through.

The city should expand its transport links to the wider region, eastward through the high-speed rail links, and to other urban areas including the Randstad megalopolis, through completion of RandstadRail.

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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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