Transport Outlook 2012

International Transport Forum Perspective on Mobility (and CO₂) in 2050

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Themes

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What will drive mobility?

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What scenarios bind the future?

.03 | Insights
What can we say from the Outlook?

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Closing words
2050: Global needs must be reconciled

Key challenges on the way to a world of 9 billion people in 2050
• Economic prosperity and development
• Equity
• Safety and health
• Energy
• Environmental quality and climate
2050: Drivers of mobility

**GDP** growth continued but re-balanced

**Population** growth strong but differentiated

**Cities** becoming even more important

**Motorisation** growing in non-OECD countries – pattern?

**Energy Prices** are uncertain but likely increasing and volatile (taxes?)
2050: Results

Growth in **mobility** (hardly) un-abated by 2050

- OECD passenger volumes 10%-50% higher, non OECD 2.4-3.6 times more

Growth in **CO$_2$ emissions** less than mobility – x 1.5 to 2.4 times 2010 globally

**Prices matter:** (high) Oil, fuel and km charging depress mobility
2050: Insights

Need for better balanced mobility – *eclectic* transport

Mobility needs will require (new) infrastructure but competition for capital likely to be stiff – *prioritisation* key

Key priorities should focus on high (societal) returns; virtual/physical *linking* of systems helpful, cities innovation hotbeds

Strong de-carbonisation requires uptake of low-carbon *technologies*
2050: Closing Words

Diversity-based mobility policy
Seamless Transport: Making Connections

2-4 May 2012
Leipzig, Germany
13 years of projected transport emission reductions for this set of countries including all existing and planned policies (2007-2020)

Global Transport CO₂ emissions in 2008 (2627 Mt)

Transport CO₂ emissions from this set of countries in 2008 (2627 Mt)

Global CO₂ emissions from fuel combustion in 2008 (28348Mt)

Source: UNFCCC National reports, ITF analysis
Car ownership: Untapped (untappable?) potential

Cars per 1000 people

Source: World Bank, UN Statistics
Motorisation and income

Asia
- China
- Japan
- Korea

Europe
- France
- Germany
- UK
- Spain
- Belgium
- Denmark
- Greece
- Ireland
- Italy
- Netherlands
- Austria
- Portugal

Australia, Canada and USA
- USA
- Canada
- Australia

Source: Wang, 2006 – Argonne National Laboratories
Vision for the city and transport

Manage transport demand, price it where feasible, build capacity where required

Focus on the reliability of transport, not just speed

Inform users of conditions in a way that is useful to them

Re-think the allocation of city space, manage parking... experiment!

Foster mobility entrepreneurship

Governance and enforcement must be robust

Address the mobility needs of the poor and the periphery
People want to live in cities

0.5% 70% 70% 60% 75% 33%

2050 GDP by 2025 slums

Source: Living in the endless city