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LOCAL TRANSPORT IN EUROPE: INSTITUTIONS AND PRACTICES

Local transport represents a major share of mobility systems, both in terms of the number of journeys and the resources mobilized. It is an important factor in the daily life of all inhabitants and is receiving more and more attention. The term “Local Transport” is used here in a generic way, including urban and suburban transport, on the scale of a city or of its metropolitan area, but also in rural areas, including all modes of transport, individual and collective.

Local authorities are playing an ever-greater role in the definition and implementation of transport policies. The OPSTE presents in this document a comparison of the issues which structure their debates and their decisions. One issue is present in all individual countries and on the European level: the place of automobiles in mobility and ways to restrict or at least regulate and modify their use. The responses reveal a varied panorama, revealing what is at stake and the long-term outlook.

Notwithstanding the principle of subsidiarity, the influence of the European Union is significant in terms of local transport, particularly to promote sustainable mobility.

The OPSTE session held in October-November addressed the breakdown of powers between the levels of authorities for local transport and local mobility practices, to the extent that the available data shed light on them, and on the main objectives of the local public policies.

Local transport in Europe
A major part of the transport system

Local transport uses a large share of infrastructure and vehicles and is a source of substantial related consumption, particularly energy consumption. With its performances, the occupation of public spaces, the cost and the price, the time spent, the external effects, etc., it affects everyone's daily lives and shapes the territory. Furthermore, local transport is linked to long-distance transport, and the quality of their interconnections ensures the proper functioning of the whole system.

The term local transport is used here in a generic sense. It refers to relatively short transport distances, most often less than 50 km. For passenger transport, we observe on average **three local journeys per day and per person**, on foot or with means of private or public transport.

The contributions of the OPSTE experts show that, throughout Europe, the most commonly used means of transport, particularly for local transport, is the automobile[1]. This situation is the result of the great increase in household car ownership, starting in the 1960s, which transformed transport practices and allowed for a structural modification of the use of space: **urban sprawl**. Average car ownership in the European Union is now **578 automobiles per 1,000 inhabitants**.

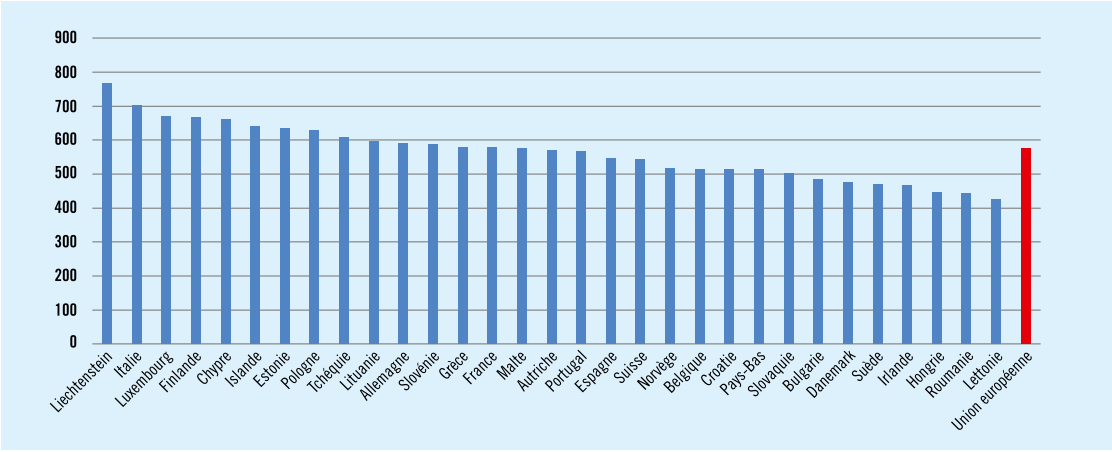
Cars account for 82% of motorized ground transport of passengers in the European Union (measured in passenger-kilometers) and represent about 80% of the budget of households devoted to transport (which represented 12.5% of their income in 2022)[2].

For economic and ecological reasons, this situation is now being reconsidered, but overcoming it will probably take as much time as it took for the situation to arise in the first place. The main topic in the thinking about mobility (and especially local mobility) in Europe is thus the place of the automobile and, in complement, its decarbonization. In its analysis of the European elections of 2024, the OPSTE demonstrated that in terms of transport the most prominent topic of the campaign and also the most divisive was the future of the automobile[3].

Historical reminder: road expansion

In 1954, the French road system was composed of a main network of 80,000 km (national roads) and a secondary network of 611,000 km (departmental roads, rural roads and urban roads), for a total of 681,000 km. In 2022, it included a main network reduced to 21,000 km (highways and national roads) and a secondary network of 1,081,000 km (departmental roads and municipal roads), for a total of 1,102,000 km. Over the past ten years, the municipal road network has increased by 3,500 km per year.
In 1954, there were 2.7 million cars on the road in France. There were 40 million in 2025. In 1960, 25% of households owned a car; today it is 85% (40% have two cars or more).

Sources: *Rapport sur les comptes de la Nation 1954*, CCTN, s.d., and *Chiffres clés du transport*, Ministry for the Ecological Transition and Territorial Cohesion, 2025.



Rate of car ownership in Europe (automobiles per 1,000 inhabitants), 2024

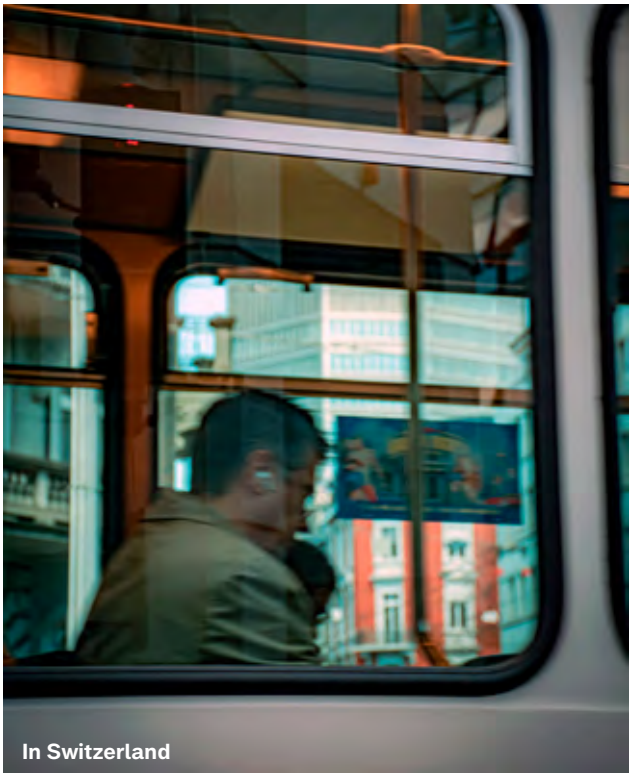
Source : Eurostat

1. - After the Covid crisis and when European policy was focusing on the Green Deal, the OPSTE addressed, on several occasions, the issue of the decarbonization of transport, and especially cars. See:

- *Decarbonization of transport in Europe,* Transport / Europe n° 6, December 2022
- *Sufficiency of transport systems: Translations in Europe?,* *Transport / Europe* n° 7, February 2023
- *Decarbonization of road transport in Europe,* *Transport / Europe* n° 8, July 2023

2. - Source: Eurostat.

3. - OPSTE, *The place of transport in the European elections*, *Transport / Europe* n° 11, December 2024.


In Switzerland

Among the countries of Europe which have the fewest cars, we see the countries of the eastern part of the EU which had access to cars somewhat later (Latvia, Romania, Hungary) but also the countries in the western part of the EU which have developed policies to reduce the use of cars (Sweden, Denmark).

Local transport and institutions

Today, the policy priority in many countries is "daily mobility" (the expression is the same in German: *Alltagsmobilität*), after a phase during which the development of the long-distance transport networks (highways, high-speed trains, airports) was promoted. With political decentralization, elected officials are paying more attention to local mobility which they are in charge of, which represents a large share of the budget of their community, and which influences the voting choices of their voters.
The breakdown of competences between the various institutional levels (from municipalities up to the European Union for the 27 member States) takes this evolution into account.

Role of the European Union

Transport policy is one of the two common policies named by the Treaty of Rome of 1957 which founded the European Economic Community (EEC).

However, the situation is ambiguous in terms of local transport. By virtue of the principle of subsidiarity[4], the EU has almost no competence in terms of local transports, other than within the framework of the rules for the Trans-European Transport Network (TEN-T)[5]. This implies the drafting of a Sustainable Urban Mobility Plan (SUMP) for each of the 431 nodes of the network, as well as the creation of one multimodal hub for freight and another one for travelers.
However, the EU has prescriptive power through the communications of the Commission concerning urban transport, for the development of Sustainable Urban Mobility Plans. Moreover, the EU finances concrete projects which are part of this sustainability approach, especially in the countries where households gained access to cars fairly late and who are reticent to limit use of cars in urban areas.

Competences of the regional institutions of the European countries in terms of transport

Most often local transport is the **responsibility of the local and regional authorities** (which can be organized on several levels), but sometimes with the intervention of the central authority. This is the case in Belgium for rail for example, which remains one of the attributes of the federal authority (with Infrabel, the infrastructure manager, and SNCB, rail company) and in Spain (with Gif and Renfe).
The organization of responsibilities, decisions and financing is determined by the institutional architecture: what are the levels of territorial political bodies, and do they interlock (as with municipalities in an inter-municipality) or overlap, with or without a hierarchy from one level to another? We observe in various places the existence of municipalities (of very unequal sizes and populations, as there are 342 in the Netherlands and 34,875 in France – one hundred times more), inter-municipalities (called syndicates, districts, communities, etc.), departments (or arrondissements, delegations, districts, provinces), regions (or cantons, Länder, voivodships, autonomous communities) and lastly a central or federal government. To allow for comparisons between countries, the European Union established the Nomenclature of Territorial Units for Statistics of the European Union (NUTS, see the diagram of Territorial Institutions in Spain, page 34).

The heterogeneity of the types of organizations, the result of a specific political and cultural history, is very substantial from one country to another, and also within individual countries in the case of decentralized or federal systems.

4. - Political principle by which a central authority cannot carry out tasks that cannot be carried out at the lower level.

5. - This regulation was adopted for the first time in 2013 and revised in 2024 – ***see Regulation (EU) 2024/1679 on the orientations of the European Union for the development of the Trans-European transport network.***


Venice, Italy

The European Union and sustainable urban mobility

Despite the principle of subsidiarity, the European Union has been concerned about urban mobility for many years. The Green Paper Towards a new culture for urban mobility was released in 2007[6]. While there is no European legislation in the strict sense in this area other than the regulations on the TEN-T, the EU is involved through communications (non-binding) and financial support for sustainable urban mobility.
After the white paper "Roadmap to a single European transport area: Towards a competitive and resource-efficient transport system" of 2011[7], in 2013 the Commission published the communication Together towards competitive and resource-efficient urban mobility[8]. In this document it recommends the drafting of Sustainable Urban Mobility Plan (SUMP), adapted to each specific situation and aiming to promote balanced development and better integration of various modes of transport in urban areas.
The communication of the Commission of 2021 presents, in the context of the Green Deal, The New EU Urban Mobility Framework[9]. It draws lessons from Covid and recommends:

- A reinforced approach to the urban nodes of the TEN-T as well as SUMPs and mobility management plans.
- The implementation of follow-up for progress and indicators of sustainable urban mobility.
- Attractive public transport services supported by a multimodal approach and by digitization.
- Renewed attention to walking, bicycling and micromobility.

Urban freight and delivery logistics to the last kilometer with zero emissions.
Digitization and innovation for new mobility services, with all of these measures aiming to "go towards climate neutral cities: resilient urban transports."
The recommendation of the Commission of 2023[10] came back to "National Programmes for Sustainable Urban Mobility Planning".

The **TEN-T regulation**, revised in 2024, has a binding dimension: in particular, each of its 424 urban nodes must have a SUMP and must build a multimodal platform for travelers, and later on a platform for freight. In the current political context—marked by growing concerns over sovereignty, competitiveness and security—what resources will be available for urban nodes, given that the future CEF is expected, according to the proposal put forward by the European Commission in July 2025 for the EU's 2028–2034 Multiannual Financial Framework, to refocus on missing cross-border sections in order to complete the TEN-T core network and extended core network, as well as on dual-use civil and military mobility?
While some investments in urban nodes should continue to be eligible for funding under the 2028–2034 CEF, by falling under the priority given to cross-border sections, uncertainties remain—particularly regarding the eligibility of multimodal passenger transport hubs under the future CEF. It cannot be ruled out that, from 2028 onwards, funding for such facilities will fall under national and regional partnership plans, which are intended to bring together all EU funds currently under shared management (such as cohesion policy funds or the CAP). In that case, investment choices would lie with the Member States.

6. - European Commission, *Green Paper – Towards a new culture for urban mobility*, 2007, 25 p.
7. - European Commission, *Roadmap to a single European transport area: Towards a competitive and resource efficient transport system*, 2011
8. - Communication of the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Regions Committee, *Together towards competitive and resource efficient urban mobility*, 2013, 15 p.
9. - Communication of the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Regions Committee, The new EU urban mobility Framework, 2021
10. - Recommendation (EU) 2023/550 of the Commission of 8 March 2023 on the *National Programmes for Sustainable Urban Mobility Planning*, 2023

In general, the breakdown of the responsibility works based on a rationale of subsidiarity within each country. Local transport is the responsibility of the municipalities (and associations of municipalities, because the mobility areas very often go beyond the administrative limits of a municipality, even in average cities).

Regional transports are handled by larger entities. In several countries, this had long been the responsibility of departments, provinces, districts, etc., of rank NUTS 3 regardless of their names (and which can be of very different sizes within one country and from one country to another). The historical trend towards longer daily transport distances, made possible by modern means of transport (but with a constant time budget, on the order of one hour per day on average), encourages the assigning of this responsibility to a broader entity, of rank NUTS 2 (region, canton, autonomous community, Land, etc.).

We observe this evolution in Greece, where the departments no longer exist, in Italy with the decline of the role of the provinces, in France (where the regions are now the public transport organizing authorities with a role of "leader"), etc.

- In Germany, the rail network belongs to the federal government, but the Länder, the Federated States, are in charge of local rail transport for passengers (Schienenpersonennahverkehr, SPNV).
- In Belgium, the Brussels Capital region, which includes 19 municipalities, is responsible for local public transport (bus, tram, metro).
- In the Netherlands, since the law on passenger transport of 2000[11], the provinces (only twelve for the entire country) are, more than municipalities, in charge of public transport.
- In Poland, each voivodship develops its own regional transport plan using its own method.
- In Romania, since the law of 202 urban mobility has been the subject of a new, integrated and multimodal approach with the Sustainable Urban Mobility Plan. This plan is detailed on the level of the Territorial Development Units in the Local Urbanization Plan.
- In Switzerland, the Confederation is responsible for long-distance public transport but is also involved, with the cantons, in regional transport and contributes to transport infrastructures in the metropolitan areas. The 26 cantons are responsible for regional transport but are also involved in local and metropolitan area transports.

This evolution is part of broader thinking which goes beyond the field of transports, aiming to simplify the stacking of layers of territorial administration.

But, while the intermediary level between municipalities and regions is becoming less important or disappearing, another phenomenon is appearing as a countertrend: **metropolization**. The most powerful urban entities are structuring a broader space, grouping many municipalities, organized in concentric or polycentric circles. Mobilities within metropolitan areas and their peripheries require, in addition to cars which are most often the most used mode, several means of public transport with different and complementary performances: bus, tramways and Bus Rapid Transit (BRT), or even metros and regional trains.

This type of complex system requires a specific legislative framework.

- In France, the specific transport needs of metropolitan areas are covered by a law on Metropolitan Regional Express Services (Services express régionaux métropolitains, Serm)[12], transposing to the large provincial cities the experience of the Paris metropolitan area (where the Grand Paris Express in particular is being built).
- In Spain, the transport consortium of the Madrid region includes several municipalities and, for rail transport, works with the Ministry of Transports and Sustainable Mobility.
- In Italy, during the period when the influence of the provinces diminished, the responsibility for local transport shifted to the regions and the metropolitan cities (Città Metropolitane).
- In the Netherlands, the cities of Amsterdam and Rotterdam have the special status of "transport regions".

Organization of local transport

The most common system in Europe for the organization of local transport (urban and regional) is now **the concession of public transport** to operators through a tender offer procedure, in compliance with European regulations. However, this does not rule out the possibility of an authority (by which a public entity forms its own company, a transport company in this case), as long as it does not seek to obtain a concession put in competition outside of its own perimeter.
The notion of public service has a different significance from one political – or even philosophical – context to another. In the European texts, the providing of a Services of General Interest (SGIs) by a public authority is only justified if the market is not able to provide it. In Germany, the notion of *Daseinsforsorge* has a deeper meaning and designates "care for the essential for human existence."
In France, taking a more legal approach, the three principles of equality, continuity and changeability of the public service are highlighted.

11. - *Wet van 6 juli 2000, houdende nieuwe regels omtrent het openbaar vervoer, besloten busvervoer en taxivervoer*
12. - *Law n° 2023-1269 of 27 December 2023 concerning metropolitan regional express services*


Brussels, Belgium

- In Germany, many cities provide municipal public services, including transport, with their municipal authorities (Stadtwerke).
- In Belgium, la Société des transports intercommunaux de Bruxelles (Stib) is a public law association, owned by the Brussels Capital Region. The relations between the organizing authority and the operator are contractual.
- In Spain, the autonomous communities of the Basque Country and Catalunya are establishing their own rail companies in partnership with Renfe (the historical national rail company).
- In France, the historical Parisian transport company, RATP, is now in competition with other operators, while it is seeking to take on the management of other urban networks through one of its subsidiaries.
- In Greece, the public company OSY manages the metro, tramways, trolleybuses and buses of the Athens metropolitan area.
- In the Netherlands, the management of the national rail system, which provides very dense and intensive coverage of the country, is totally allocated to the historical operator NS, with no tenders. This system is contested by the European Commission.

The liberalization of the local transport markets is taking on the form of competition for the market, as opposed to **competition on the market** as in the case of free access to the network which can be observed for high-speed trains in Italy, France and Spain. Based on a set of specifications and following an invitation to tender, the operators who are selected receive, for a given territory and duration, the concession of a public transport service. On various perimeters and with varying titles, transport organizing authorities are implemented by the decentralized public administrations and are responsible for the planning of transport, contracts with the operators, prices, and information to users.

- In France, a form of organization with a mobility organizing authority is mandatory for metropolitan areas (more than 400,000 inhabitants), urban communities (more than 250,000 inhabitants) and metropolitan area communities (more than 50,000 inhabitants) and optional for communities of municipalities. The Mobility Organising Authority have as their mandatory missions the organization of regular urban and non-urban public transport services for passengers, the development of modes of non-motorized ground travel and shared uses of motor vehicles, etc.
- In Italy, the planning and management of public transport is handled by mobility agencies. In diverse forms, they are present in seven regions out of 21, covering 55% of the Italian population.
- In the Netherlands, the provinces attribute multimodal concessions (train and bus) to local transport operators for a duration of ten years in general.

In this sort of evolution, the role of the State has evolved. While it may remain the transport operator in countries where the historical rail company remains in public hands, the State is becoming more of a regulating body in the sense that it makes sure that the opening of the transport markets to competition respects the rules of equal treatment of operators by the conceding public authorities[13].

Mobility practices

While the basic organizational schemes can be observed from one situation to another, we observe **significant differences in terms of the effective** functioning of local transport systems, in terms of the availability of transport offers, the number of journeys, the breakdown between individual and collective transport and between modes of transport, financing of investments, the breakdown of operations between public entities and companies, prices for the use of publics transport, etc.
This results from both the objectives of the transport policies carried out locally (focus placed on cars or public transport, the environment, safety, high quality

13. - See: OPSTE, ***Transport regulation authorities in Europe***, *Transport / Europe* n° 9, September 2023.

service for the area, the allocation of public spaces, etc.) and the means allocated for this. The understanding of mobility in terms of its systems and performances is based on information which is very unequal and often imperfect from one country to another. Major trends can nevertheless be observed in the overview presented in the following pages.

Place of the automobile

In the following presentation which includes all motorized ground transport of passengers, local and long-distance, the countries are classified in descending order with respect to the share of cars in mobility. Throughout Europe, the automobile is the number one mode of passenger transport, with a modal share (in passenger-kilometers) of 82.5% on average in the European Union and ranging from 68% in Hungary to 91% in Portugal. Countries of Western and Eastern Europe are mixed together, both at the top and at the bottom of this classification. Furthermore, Hungary, the Czech Republic, Cyprus and Greece stand out due to their use of buses and cars (9.9% of the average modal share in the EU), while Switzerland, Austria and the Netherlands are the countries which attribute the largest share of their traffic to rail (7.6% of the average modal share in the EU). These rather significant differences result from a historical legacy and also demonstrate that a sustained policy can influence modal sharing, and particularly the share of rail.

Modal sharing of local transport

On the local level and outside of rural areas, the modal breakdown is very different, with greater use of public transport as well as bicycles and walking[14]. The combination of the scarcity of road space and the density of the population makes it impossible to have service relying exclusively on cars, particularly in city centers. For example, in the Athens-Piraeus region, cars account for only half of all journeys (see the diagram Modal Breakdown of Mobility in Attica, page 21).
Within the urban areas, the modal breakdown is very different from one case to another. The discrepancies are partly the result of the mobility policies carried out over the years, by the competent authorities, which have affected the place given to cars (sharing of road space, availability of parking spaces, traffic plan) and on the availability of public transport. But other factors play a role, including socioeconomic ones, and of course interfere with the policies and in particular the size of cities.

We observe more walking, bicycling and use of public transport (which is widely available) in large cities, which have both high densities and less public space, and on the contrary greater use of cars in smaller cities, as seen in the Germany example. The need for cars is still high in rural areas (see the table Modal Breakdown of Journeys according to the size of cities in Germany, page 20).
This example also explains why, although an evolution towards a lesser share for cars in daily mobilities is observable in various places in Europe, this is occur-

(p.km, %)	Auto-mobiles	Cars, bus and trolleybus	Trains
Portugal	91.0	4.8	4.2
Norway	89.8	5.4	4.9
Lithuania	88.3	10.8	1.0
Slovenia	86.3	11.6	2.1
United Kingdom	86.2	5.2	8.5
Netherlands	85.5	2.7	11.8
Finland	85.2	9.8	5.0
Croatia	85.1	11.9	3.0
France	84.6	5.6	9.9
Germany	84.5	7.2	8.3
Estonia	84.0	14.0	2.0
Luxembourg	83.6	12.2	4.3
Sweden	83.5	7.3	9.2
Malta	83.1	16.9	0
Spain	82.7	10.6	6.7
Bulgaria	82.3	15.1	2.6
Ireland	82.3	14.7	3.0
Cyprus	81.8	18.2	0
Greece	81.4	17.7	0.9
Italy	80.8	12.9	6.3
Denmark	80.6	9.7	9.7
Belgium	80.4	11.5	8.2
Latvia	79.0	17.0	4.0
Romania	78.5	16.9	4.6
Poland	78.2	15.5	6.3
Austria	77.9	9.9	12.2
Slovakia	77.6	15.1	7.4
Switzerland	74.6	5.8	19.6
Czech Republic	72.8	18.8	8.4
Hungary	68.6	21.3	10.0
European Union 27	82.5	9.9	7.6

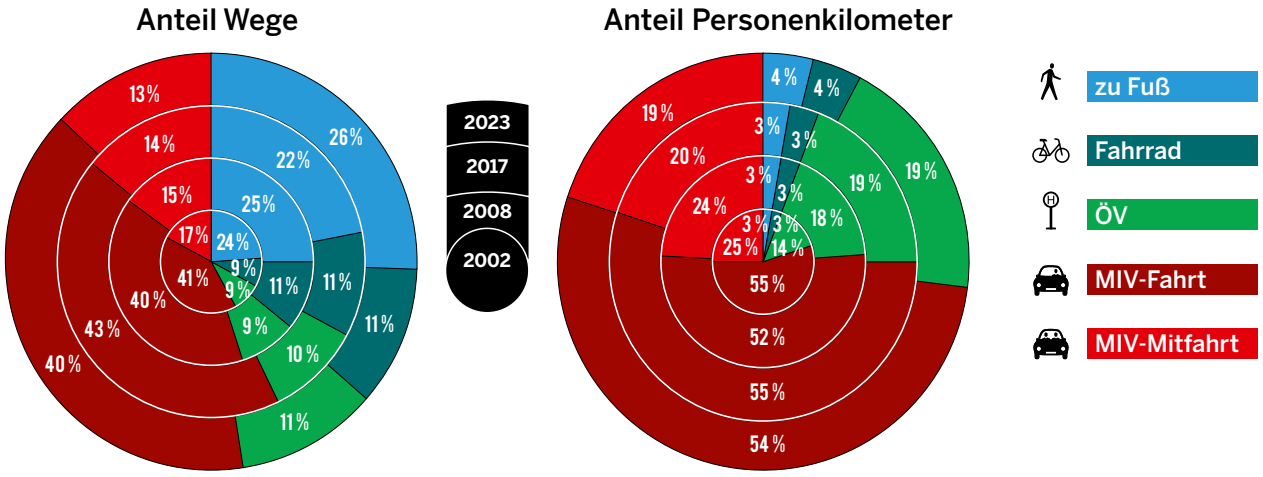
Modal sharing of motorized ground transport of passengers in Europe (EU + 3) passenger-kilometers, %, 2023

Source : Eurostat

14. - In general, walking to a garage to reach your car or walking to a bus stop is not taken into account, the journey is considered to be by car or by bus. Only journeys that are entirely by foot are considered as such.

MODAL SPLIT

Wege



	Wege *in Mio. pro Tag*				Personenkilometer *in Mio. pro Tag*				Wegelänge *in km 2023*	
	2002	2008	2017	2023	2002	2008	2017	2023	*Mittelwert*	*Median*
zu Fuß	64	69	56	65	88	98	93	114	1,7	1,0
Fahrrad	25	29	28	28	82	96	112	118	4,3	2,1
ÖV	25	26	26	27	387	554	605	564	21,1	7,2
MIV-Fahrt	111	110	111	99	1 496	1 589	1 754	1 620	18,5	6,7
MIV-Mitfahrt	45	41	36	31	665	735	650	584	16,3	6,7
gesamt	**270**	**275**	**257**	**250**	**2 717**	**3 080**	**3 214**	**3 000**	**11,9**	**3,8**

Modal sharing (journeys and passenger-kilometers) in Germany, 2002-2023
walking, bicycling, public transport, driver alone, automobile passengers

Source: Bundesministerium für Digitales und Verkehr, *Mobilität in Deutschland – MiD*, 2023, 24 p.

ring mainly in the center of the largest cities, before spreading to smaller cities and into wider perimeters, and is therefore not very visible in the national averages encompassing all the territories.

In Germany for example, from 2002 to 2023, we observe a slight decrease in the number of journeys and a slight increase in the number of passenger-kilometers. The modal sharing is evolving gradually, with an increase in the share of walking, bicycling and public transport (these three modes added together rose from 18% to 27% of the passenger-kilometers from 2002 to 2023), a stability of "solo driving" journeys, and a decrease in the number of non-driver automobile passengers.

Another significant factor, which is not independent from the preceding one, is **the standard of living of city dwellers**, as the Italian example demonstrates. The poorest municipalities are those where there is the least use of walking, bicycling and public transport and where people depend the most on motorcycles and cars. The richest municipalities are those where the "sustainable mobility rate" is highest. This social divide is also geographic: it distinguishes the city and the country, small cities and large cities, city centers and outskirts in the large metropolitan areas, rich regions and poor regions (See the table Modal sharing of mobility according to income of inhabitants of municipalities in Italy, page 25).

Trends

The dynamic of local transport varies from place to place. The recent past was marked by the **Covid crisis**, which affected people's journeys (with a much smaller effect on freight) and in particular public transport[15].

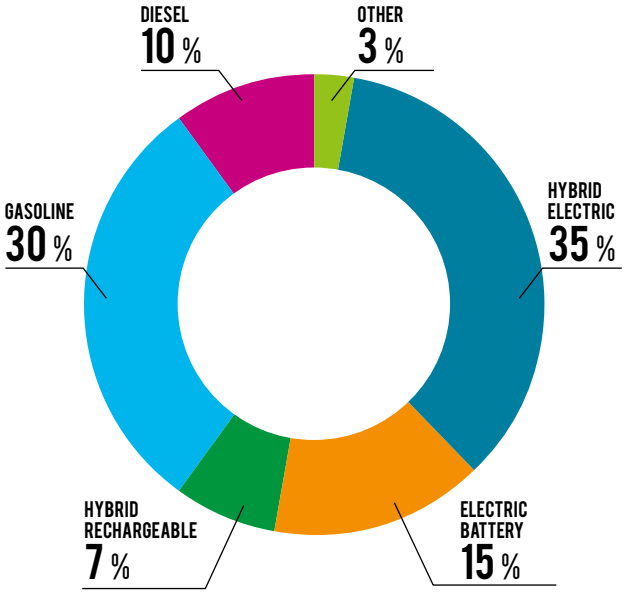
Short-term adaptations (teleworking certain days of the week, increased use of e-commerce, temporary bike lanes) were partially continued, modifying the equilibria between modes (including walking and bicycling) and sometimes threatening the economic

15. - See:
OPSTE, *Covid-19 crisis and transport in Europe*, *Transport/Europe* n° 3, March 2021.
OPSTE, *From the Covid crisis to recovery plans: the stakes and consequences for transport systems*, *Transport/Europe* n° 4, September 2021.

Valencia, Spain

equilibrium of the public transport operators. The breakdown of flows according to the days of the week changed, with peaks on certain days and an increase in mobility during the weekend. In some countries, the volume of public transport exceeded the volumes from before the epidemic, while in other places the volumes have not returned to the earlier levels (and will they?). See also the diagram Evolution of passenger levels of the Brussels transport company, page 14.
A concern that is often mentioned: it is in urban public transport that the most rapid decarbonization of transport is occurring, with the greening of bus fleets (see the diagram Greening of the Bus Fleet in the Netherlands, page 28).

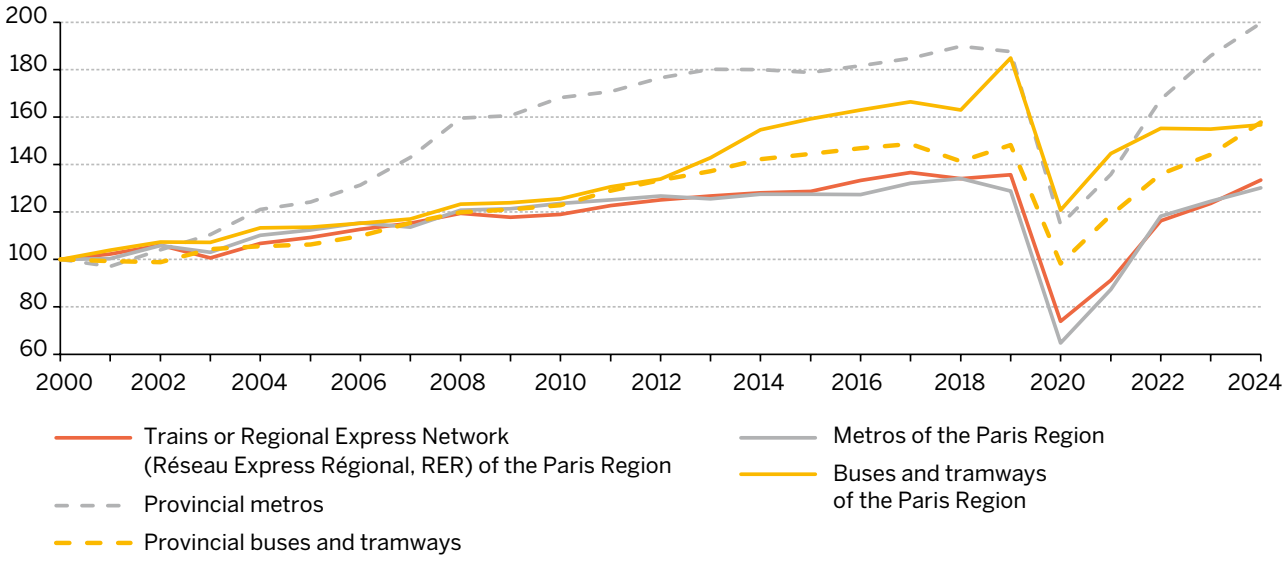
For cars, decarbonization is underway but less vigorously, because the models offered by European manufacturers have long been heavy and expensive, because company car fleets (which supply the used car market) are switching to electric more slowly than expected, and lastly because the non-rechargeable hybrid electric models are still combustion models.



Sales of new cars in Europe by type of energy, January 2025
Source : ACEA

Outlook

In the longer term, structural issues are not addressed in the same ways everywhere, particularly those related to the outlook for local mobility.
In Switzerland, we observe a continuation of the increase in passenger rail traffic, more rapid than the growth of the population and more rapid than the growth of road transport, whether private or public.
Driven by **population growth** (Switzerland's resident population increased by 22% in 25 years), the urban expansion is taking the form of greater distance from places of residence outside of the metropolitan area where jobs are concentrated and, particularly because of road congestion, the train is the most convenient means of transport for this commuting (see the diagram Evolution of passenger transport with respect to the population in Switzerland, page 38).
The problem of the Swiss regional trains is the saturation of their capacity, while the occupancy rate remains low in other countries despite high public subsidies to keep prices low[16].
Conversely, over the past twenty years Italy has seen a downward trend in mobility, regardless of whether this is measured in number of journeys or in number



Indices of the evolution of modes of urban public transport in France
Source: ***Bilan annuel des transports en 2024***, SDES, November 2025.

16. - In France, the rate of occupancy of proximity regional express trains (TER) was 27% in 2023, versus 77% for the freely organized services (non-subsidized long-distance trains).
Source: ***Marché français du transport ferroviaire***, 2023 figures, Transport Regulation Authority.

of passenger-kilometers (see the diagram Number of passenger-kilometers and number of journeys in Italy, page 24). One element of structural explanation is the **decline of the population** and, in correlation, its aging. This outlook could apply to other European countries, in which the birth rate is far below the population replacement rate (2.05 children per woman).

We have seen in several countries that **modal sharing** is evolving rather slowly as a national average and that the automobile remains in first place everywhere. There are significant changes on an urban and regional level however, with a double movement: on the one hand, the implementation of more effective collective systems, combining several modes (bus, BRT, tramways and sometimes metros and heavy rail), and on the other hand, the reduction of the space granted to cars (through street and parking space design and, in some cities, with an urban toll[17]).

We observe an increase in the number of journeys on foot, by bicycle and with public transport as well as a decrease in the number of private cars. This decrease does not aim to limit greenhouse gas emissions (which decrease with the improvement of combustion engines and even more so with the shift to electric cars) but rather to limit local pollution and noise and to free up public space for other uses.

The example of the Vaud canton demonstrates the abundance and diversity of the regional public transport, with 28 rail lines (managed by nine different companies) in addition to the Swiss Federal Railways (SBB) mainline trains, two metro lines, four funiculars and a bus and BRT network (around Lausanne), with tramways to be added soon (see the Vaud Canton Transport Map, page 37).

Within this long-term evolution, comparisons between European countries have demonstrated that access to automobiles for the majority of households occurred with a major time lag between the countries of the western part and the eastern part of the European Union. Will this discrepancy be maintained in the coming years, with the countries that have most recently obtained cars following with a time lag the same path of evolution as the first countries to obtain mass **access to automobiles**? This path can be broken down into three successive phases:

1°) The acquisition of cars, the development of the road network, the substitution for rail and public transport;
2°) The leveling off of car purchases, saturation of the urban space, congestion, redevelopment of public transport;
3°) Towards a decrease in the number of cars in the densest areas (which are suitable for public transport), the sharing of public space, the development of active modes and comprehensive planning for quality of life in cities.

What will be the influence of the EU in these evolutions, particularly in the countries which joined at the time of the great expansion of 2004, to accelerate the movement, to reduce the difference between East and West and to begin phase 3 even before phase 1 has been totally completed (see Diagram Long-Term Evolution of Urban Transport Policies, page 32)?[18]

To close this panorama with the topic which opened it, we observe that cars are no longer the universal tools of mobility that they seemed to be for a time. They are and will remain in first place in travel habits according to all of the forecasts[19]. But their share will decrease – it is already decreasing – in certain types of areas, to complement other individual (soft mobilities) and collective modes. Elsewhere, cars will remain indispensable and often dominant, but their technical nature and uses will evolve (with electrification, which is already underway, or even automatization[20]).

The comparative analysis of mobility behaviors in Europe which was carried out by OPSTE thus reveals, schematically, three types of territory and mobility:
The dense core of metropolitan areas, where public transport can offer a diversified and efficient service and where the use of cars is in decline;
The urban periphery, where efficient public transport can exist for journeys to and from the center but where suburb to suburb journeys are overwhelmingly by car. However, with the expansion of the metropolitan areas, the peripheral areas are becoming denser and joining the more integrated metropolitan systems.

Lastly, the small cities and rural areas where public transport for local journeys is weak, or even non-existent, but where active mobilities and public transport upon request could have their place while cars are being decarbonized.

Lastly, over the long-term and on average, we can put forward the hypothesis that daily mobility in Europe will reach a “mobility peak”, because of a decrease in

17. - Particularly in London, Oslo, Bergen and Trondheim in Norway, Stockholm, Milan and Dublin.

18. - We see the example of China, which implemented its strategy of a massive shift to electric cars (by gaining mastery of all of the necessary techniques and resources) while the production of combustion engine vehicles was being deployed.

19. - Cf. Auverlot D., Roche Alain P.-A., Sauvant A., ***Prospective 2040 – 2060 des transports et des mobilités***, CGEDD and France stratégie, 2022.

20. - Robot taxis are already in commercial use in cities in the United States and China. Other uses will probably come, for example transport on request in urban periphery areas and rural areas.

population growth and the aging of the population and the leveling off of urban sprawl, or even its partial retraction, with daily transport distances being limited by the speed of the means of transport and by the time budget accepted by travelers. The Dutch example shows the extent to which journeys were limited in the middle of the 20th century and were made above all by rail and buses (see the diagram Evolution of mobility in the Netherlands, page 28). Today, mobilities seem to be reaching a plateau and the issue is not so much the volume of journeys but rather the mode used, the energy consumed and the space occupied.

The OPSTE will remain attentive to the weak signals which announce coming changes...

Michel Savy
Director of the Observatory of Transport Policies and Strategies in Europe

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Athens, Greece

EUROPEAN PANORAMA

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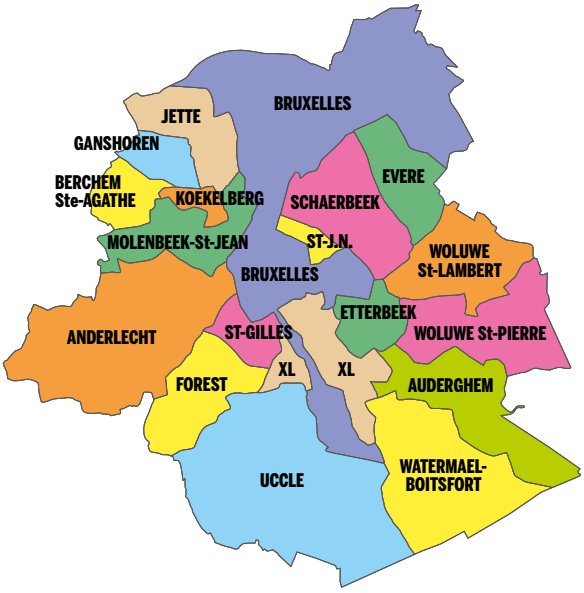
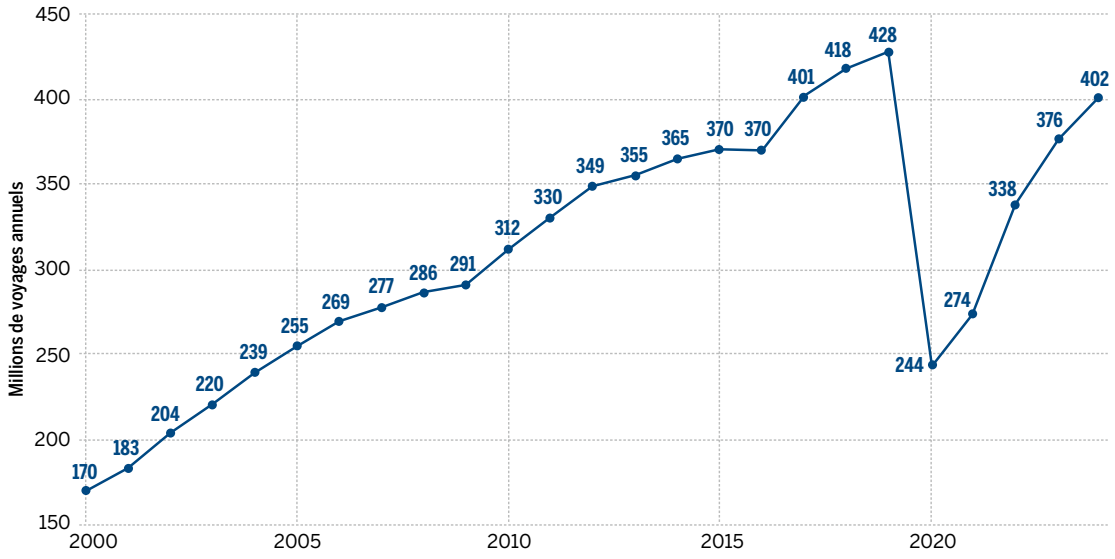
Given the complexity and the heterogeneity of the Belgian political system (organized in three regions overlapped by three linguistic communities for issues of teaching and culture), Laurent Franckx concentrated his analysis on the Brussels Capital Region.
In Belgium, the breakdown of authority between the regional level and the federal level has changed greatly over the years, in the direction of increased responsibility of the regions. In terms of transport (road, fluvial, air), the federal competences are essentially limited to the regulatory and administrative aspects.



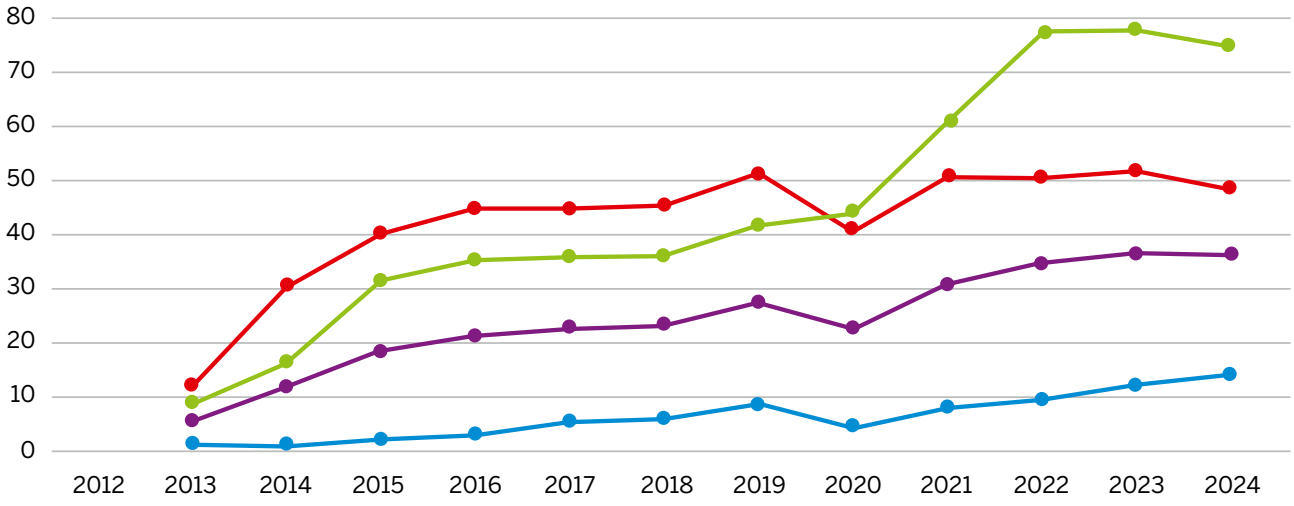
The Brussels Capital Region and its 19 municipalities

Source : *tontonsh.weebly.com*



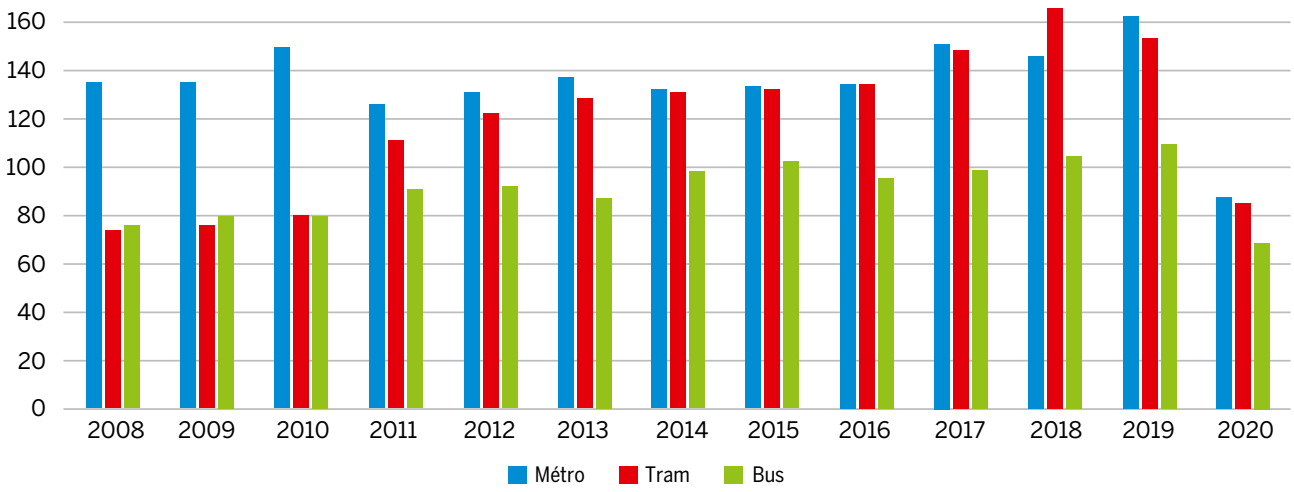
Evolution of STIB use

Source: Own calculations from the annual statements of Stib



Available seat-kilometers in passenger service

Source: Own calculations from the annual statements of Stib.



Comparison over time of the number of journeys on the result of STIB according to the mode of transport: 2008-2020 (in millions of journeys)

Source : *ibsa.brussels*

For road transport, the federal responsibility covers vehicle registrations, traffic regulations and the traffic code, authorizations for freight transport, verification of rest times and the tachograph. However, rail transport remains one of the main federal responsibilities through Infrabel, the infrastructure manager, and through SNCB, the historical national company.

The organization of local public transport (bus, tram, metro) is completely handled by the regions. The road network is divided into regional roads and municipal roads. The Brussels Capital Region includes 19 municipalities.

The governance of public transport has changed substantially since the beginning of the 20th century. It was initially handled by private initiative but within the framework of public service concessions. After the First World War there was a process of consolidation of the companies and then, after the Second World War, partial nationalization (with shares held by the State, the provinces and the municipalities). The decline of their activity led, in the 1970s, to the withdrawal of private partners. In 1989, with the third State reform, urban transport policy was transferred to the regions. The decree of 22 November 1990[21] established the new legal framework for the organization of public transport in Brussels. The Brussels Intercommunal Transport Company (*Société des transports intercommunaux de Bruxelles,* Stib) was established as a public association. The relations between the organizing authority and the operator are contractual. The public service missions are defined by the supervisory authority: to give priority to public transport to improve the quality of life in cities, and to promote efficient and balanced use of public transport given the available resources.

In compliance with the European regulatory framework, the Brussels-Capital region is the authority in charge of the organization of the public transport policy on its territory and Stib is the operator designated, by legislation and thus without competitive bidding, for the operation of the bus, tram and metro network. Stib is 100% owned by the region and constitutes an internal operator. The Brussels-Capital region is thus both the sole shareholder of Stib and its supervisory authority. However, Stib is not the only public transport operator in the region. The national rail operator (National Railway Company of Belgium, *Société nationale des chemins de fer belges*, SNCB) owns the rail stations in Brussels but focuses mainly on interurban transport. The public transport operators of Flanders and Wallonia offer connections between Brussels and their regions. Furthermore, Stib has progressively been assigned other activities: transport upon request for people with reduced mobility, shared taxis, and car sharing.

With regard to **planning for all mobilities** in the region, the Good Move plan for sustainable mobility from 2020 to 2030[22] aims to act on the demand for journeys, to reduce the place of cars, to establish an offer of "Mobility as a Service" (MaaS) on a digital platform, to develop the use of bicycles, urban logistics, and parking management. As of their launching, these orientations were controversial, for example the reduction of traffic in the center by means of dissuasive one-way streets. Today the plan is only being applied in the "pentagon", the central neighborhood of Brussels and the Haren neighborhood. A new plan is sometimes mentioned, but alternative proposals have not appeared. Furthermore, the region is currently without a government, due to the lack of a political majority, and a new government will be faced with the need to support its financial commitments, while Standard and Poor's has lowered the region's rating. One of the difficulties is the fact that some high-earning working people in Brussels do not live there and do not pay their taxes there.

FRANCE

The current institutional organization of daily transports in France results from a slow evolution aiming to reinforce mobility systems of different scales and to bring them into coherency. The Internal Transport Orientation Act (*Loi d'orientation des transports intérieurs*, Loti)[23] of 1982 implemented a first decentralization, breaking with a strong centralizing tradition, both political and operational. This law (which was only replaced forty years later by the Mobility Orientation Law, *Loi d'orientation des mobilités* - Lom) transfers a large share of transport competences from the departments to the regions.

Along with the implementation of political regions there is the geographic phenomenon of metropolization and its legislative translation in the Law on the Modernisation of Territorial Public Action and the Affirmation of Metropolises (*Loi de modernisation de l'action publique territoriale et d'affirmation des métropoles*, Maptam) of 2014[24].

21. - *Ordonnance du 22 Novembre 1990 relative à l'organisation des transports en commun dans la Région de Bruxelles-Capitale*
22. - Brussels mobility, *Plan régional de mobilité 2020-20, Plan stratégique et opérationnel,* 2021, 292 p.
23. - *Law n° 82-1153 of 30 December 1982 d'orientation des transports intérieurs*
24. - *Law n° 2014-58 of 27 January 2014 de modernisation de l'action publique territoriale et d'affirmation des métropoles*

The Notre Law covering the New territorial organization of the Republic of 2015[25] eliminated the clause of general competence for the regions and the departments, thereby clarifying the roles of each group. The regions thus became the leaders in mobility and in charge of inter-modality.

The Lom (Mobility Orientation Law) of 2019[26] replaced the Loti and marked a change of approach, moving from the notion of transport to that of mobility. It covers all of the territories and gives priority to "daily transports." Two major actors stand out: the Local Mobility Organizing Authorities and the regions as regional organizing authorities.

Indeed, the local Mobility Organising Authorities are in charge of mobility within the medium-size and large metropolitan areas. The region is the leader in local mobility for rail transport, interurban public road transport and in the "white zones" outside of the local Mobility Organising Authority. It plays an intermodal coordinator role through financing of rail infrastructure and the renovation of stations, in coordination with the State through multi-year programming contracts (State-Region plan contracts, *Contrats de plan État-Régions*, CPER).

However, mobility is not limited to public transport: the automobile remains a major instrument of daily transport, especially suburban and rural, and is indispensable for many inhabitants. The largest share of the French road network belongs to the departments and the municipalities: a total length of 1,109,000 kilometers in 2023, it is composed of 12,379 km of highways (1.2% of the total), 11,178 km of national roads (1%), 381,319 km of departmental road (34%) and 704,942 km of municipal roads (64%).

Mobility Organising Authority organization is mandatory for metropolitan areas (more than 400,000 inhabitants), urban communities (more than 250,000 inhabitants) and metropolitan areas communities (more than 50,000 inhabitants) and is optional for associations of local authorities. The mandatory missions of the Mobility Organising Authorities are the organization of regular urban and non-urban public transport services for passengers, the development of non-motorized ground travel modes and shared uses of land motor vehicles, and for Mobility Organising Authorities of more than 100,000 inhabitants the urban journey plans, or the implementation of an information service for users and an advising service for mobility. Their optional missions can include the organization of transport upon request, the reduction of urban congestion and pollution, the implementation of a public service for freight transport and urban logistics, the organization of carsharing activities, the implementation of actions aiming to promote carpooling and the organization of a public service for bicycle rental.

The organization of local rail transport services mobilizes several actors within the framework of the contracted public service (while high-speed trains and main line trains are "open-access services", not subsidized and open to competition):

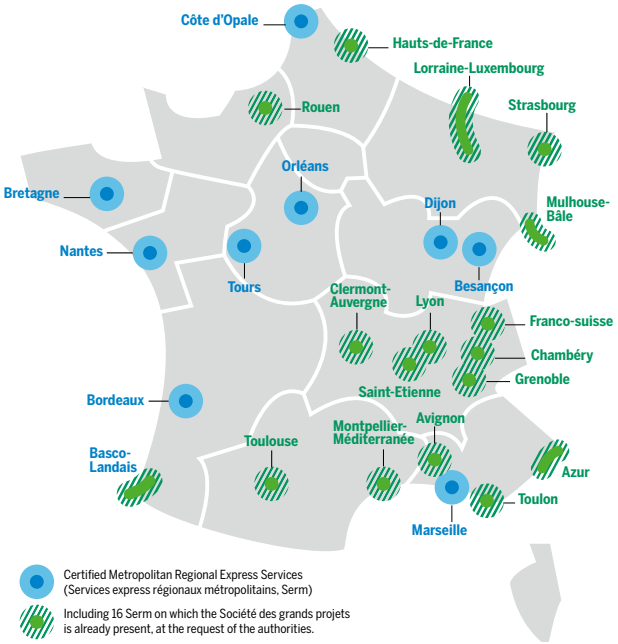
- The regions determine the transport plan and the price policy (with the exception of national concessionary fares), finance the acquisition of the rolling stock and invest in the renovation of certain lines and stations. They organize invitations to tender to choose the rail companies that will receive a public service agreement.
- SNCF Mobilités, the rail transport subsidiary of the SNCF group, is now subject to progressive opening to competition. It operates the lines for the services that it is in charge of and earns income from the sale of tickets and subscriptions, as well as subsidies from the regions. Other operators are progressively entering the market.
- SNCF Réseau, the infrastructure management subsidiary of the SNCF Group, owns and maintains the national rail network, receives tolls paid by SNCF Mobilités and other rail companies (tolls re-invoiced to the regions).
- SNCF Gares & connexions, within SNCF Mobilités, owns and maintains the stations and receives fees, paid by SNCF Mobilités and other rail companies (fees re-invoiced to the regions).
- The State contributes to the financing and renovation of the lines and stations and to some of the tolls.

In application of the European texts (directive 91/440[27] and following texts, particularly the "Recast" directive [overhaul] 2012/32[28]), regional passenger trains are now open to competition (according to invitations to tender for the market). Two concessions have already been granted to competitors of the SNCF, in the Provence-Alpes-Côte d'Azur and Normandy regions.

In the metropolitan areas, a new phase of development of local transport is opening with the ambitious program of Metropolitan area regional express services (Serm) reinforcing the links between the metropolitan areas and their peripheries (like the Regional Express Network - *Réseau Express Régional*, RER trains – in the Paris Region).

25. - *Law n° 2015-991 of 7 August 2015 portant nouvelle organisation territoriale de la République*
26. - *Law n° 2019-1428 of 24 December 2019 d'orientation des mobilités*
27. - Council Directive 91/440/EEC of 29 July 1991 on the *development of the Community's railways*
28. - Directive 2012/34/EU of the European Parliament and of the Council of 21 November 2012 *establishing a single European railway area* (recast)

These systems assume a connection of the Mobility Organising Authorities present on their perimeter but especially substantial financing, which could only occur through borrowing and according to a calendar spread over several years. These systems are multimodal and will cross through the cities for their rail section (while regional trains generally stop at the central station of the metropolitan area), at high frequency and with long operating hours.



Metropolitan area regional express service projects

Source : *Société des Grands projets*

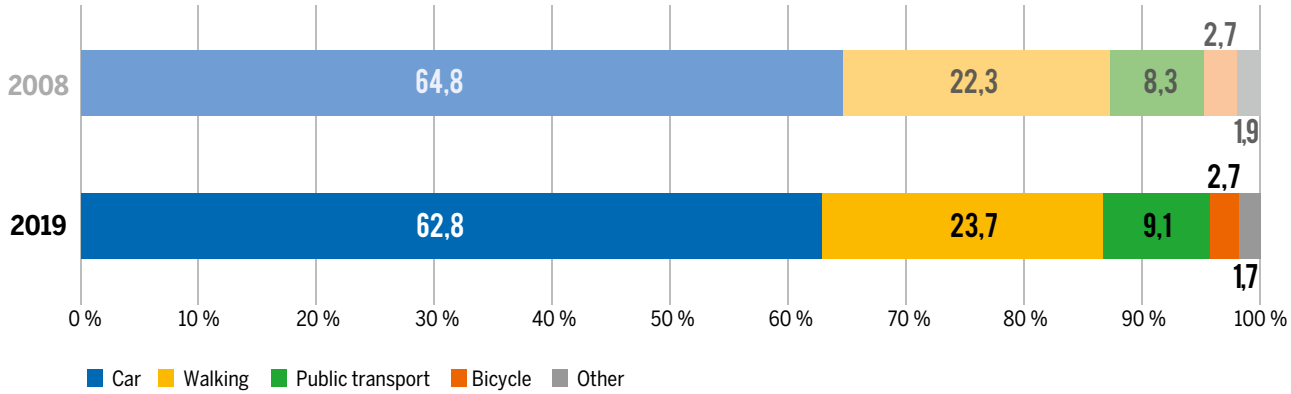
The engineering work will be handled by the Société des grands projets (SGP), formerly the Société du Grand Paris managing the Grand Paris Express which is now in construction. With a budget on the order of 42 billion euros, it is the largest local transport project in France and, reportedly, in Europe.

Grand Paris Express
Commissiong of line 14: 2024; lines 15, 16, 17 and 18: between 2026 and 2031

Source : *Grand Paris express*

Among other evolutions, we note the reconsideration of the Low Emission Zones (*Zones à faibles émissions* - ZFE), poorly accepted by some parts of public opinion and not widely applied, by a parliamentary commission.

Since Covid, the use of bicycles has grown substantially in the large cities and particularly in Paris. The bike paths that were installed temporarily have since then generally been made permanent.
Lastly, growing attention is being given, in many cities, to urban logistics, with multiple bottom-up initiatives associating public and private actors to better bring the circulation of utility vehicles and their parking for deliveries into the functioning of the city. A national action is being coordinated by the program Territorial Innovations and sustainable urban logistics + (Interlud+).



Evolution of modal share (in number of journeys) 2008-2019

Source : SDES, *Enquête mobilité des personnes*

The Survey of People's Mobility (*Enquête mobilité des personnes* - EMP), covering all journeys of people in France, has been carried out regularly since 1994. The most recent one is from 2019[29] but it will be repeated in 2026. It distinguishes local mobility from long-distance mobility (more than 80 km).
From 2008 to 2019, we observe a slight decrease in the share of cars (in terms of the number of journeys), slight growth of the market for public transport (despite the scope of the investments made) and stagnation for bicycling. One could imagine that new habits were formed during the Covid crisis, which the 2026 survey should reveal.

For urban transport alone and in terms of passenger-kilometers, the 2022 traffic returned to the level of 2012. The Île-de-France alone accounts for three quarters of this activity (30 billion p.km out of a total of 40).

In billions of passenger-kilometers	2012	2019	2021	2022
All Paris Region	**30,6**	**34,1**	**23,7**	**30,1**
Trains and RER [1]	18	19,5	13,1	17,3
Metros	7,7	7,8	5,3	7
Tramways [2]	0,4	1	0,7	0,9
Bus	4,6	5,9	4,6	4,9
All outside of the Paris Region [3]	**9,7**	**11**	**8,6**	**9,8**
Metros [3]	2,4	2,6	1,9	2,2
Tramways and buses [3]	7,2	8,4	6,7	7,7
All urban public transport	**40,3**	**45,1**	**32,3**	**40**

Source: SDES, *Enquête mobilité des personnes*

The national survey is supplemented by local studies on variable scales coordinated by the Center for studies and appraisal of risks, the environment, mobility and development (Cerema). They cover metropolitan areas in particular, one third of the country, 41% of municipalities and 74% of the population. They show, in the case of Lyon for example, a decrease in the use of cars in the metropolitan area and a sharp increase in the use of bicycles.

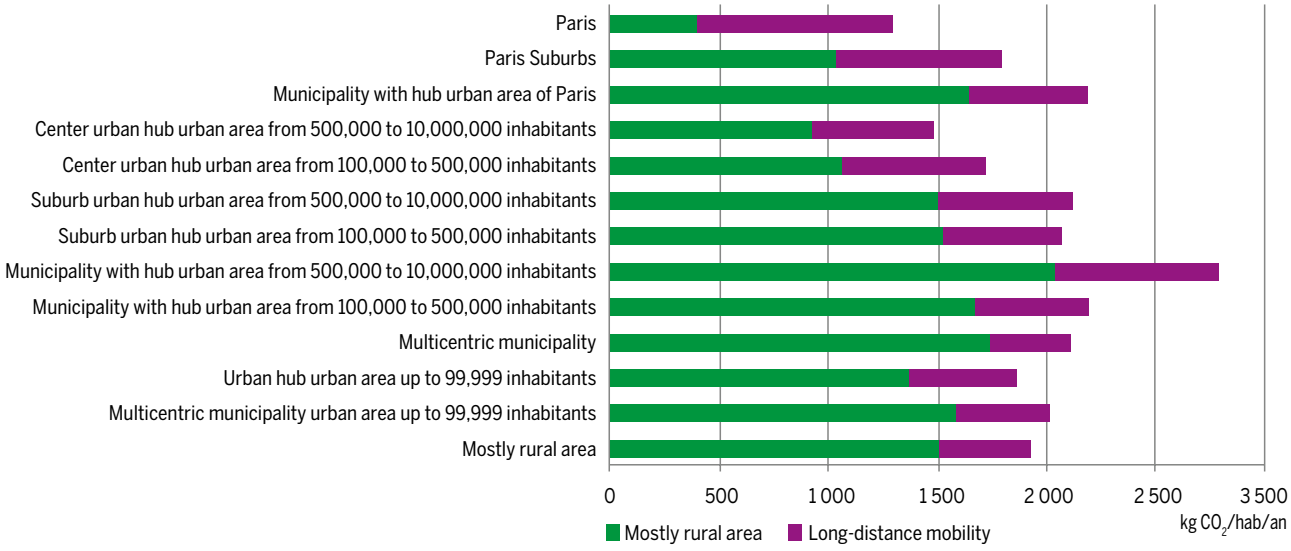
The breakdown of journeys between the days of the week has shifted since Covid, due to teleworking. It is also evolving; full-time teleworking is less frequent (it limits interactions within a working group) and is generally limited to two or three days per week. We observe a lower level of use on Fridays, a peak on Tuesdays and an increase on Saturdays and Sundays.
On the national scale, three mobility models can be distinguished, in three types of territories:

- The metropolitan areas have benefitted from a long cycle of investment in public transport (tramways, metros). The use of cars is decreasing, the traffic speed is often limited to 30 km/h, there are various transport possibilities, including bicycles. Socially speaking, wealthy people tend to live in city centers (but contrary examples exist) and, in the public space, traffic is limited to the benefit of other uses (oases of coolness, etc.).
- In the urban outskirts, it is difficult to reduce the economic and energetic dependency with respect to cars, as lower densities are not very suitable for public transport. A significant share of the population has low incomes. Households frequently have multiple cars and are opposed to limitations on the use of cars (through the application of anti-pollution standards, speed limits or price increases for fuel). Children are dependent on transport provided by their parents. The population feels that it is being neglected, by comparison with the city centers. The Serm projects aim to reinforce the links between the center and the periphery of metropolitan areas.
- In rural areas, it is difficult to reduce the economic and energetic dependency on cars. The important point here is to maintain access to public and private services for populations that do not have access to cars, often the only available transport: young people, elderly people, people with very low incomes, etc. Innovative solutions exist in different places: transport upon request, carpooling, carsharing. Poor service nourishes a feeling of exclusion.

Several ways of living thus appear, geographically juxtaposed but also sometimes socially and politically opposed. These differences can also be appreciated through the carbon footprint of mobility practices, depending on the place of residence of households. It appears that people who live in Paris, who walk a lot and are cyclists and users of public transport, have the smallest footprint for local mobility but have a large footprint for long-distance mobility (they have higher average incomes and they travel more often, sometimes for business reasons, etc.). Nevertheless, their total footprint is the lowest. Those with the highest emissions are inhabitants of polarized municipalities of more than 100,000 inhabitants, because of the emissions of their local mobility.

Issues of local mobility are linked to political and social questions which are not limited to issues of transport but also relate to **unequal access, from one territory to another, education, health care, employment, services, leisure, etc.**, as well as the acceptability of policies to fight against climate change.

29. - Data and statistical studies department, Detailed results of the survey of the mobility of people of 2019



Annual CO_2 emissions linked to journeys according to the place of residence of households, per inhabitant

Source: SOeS, Insee, Inrets, *National transport and journey survey 2028*.

GERMANY

In terms of political organization, transports in Germany, depending on the distance and their mode of operation (commercial service or public service), are the responsibility of different levels of the German government organization.

Infrastructure and domestic and international transports are the responsibility of the federal government. Given the growing importance of transport infrastructure, the government contract concluded between the parties of the coalition in power confirms the conclusions of the preparatory discussions: "The basis of a stable government is healthy finances. For this reason, we have agreed that the key issues of investment and financing will take priority. With a **special fund of 500 billion euros**, we are putting our country on the path to recovery, through investments in roads, rail, education, digitization, energy and health."

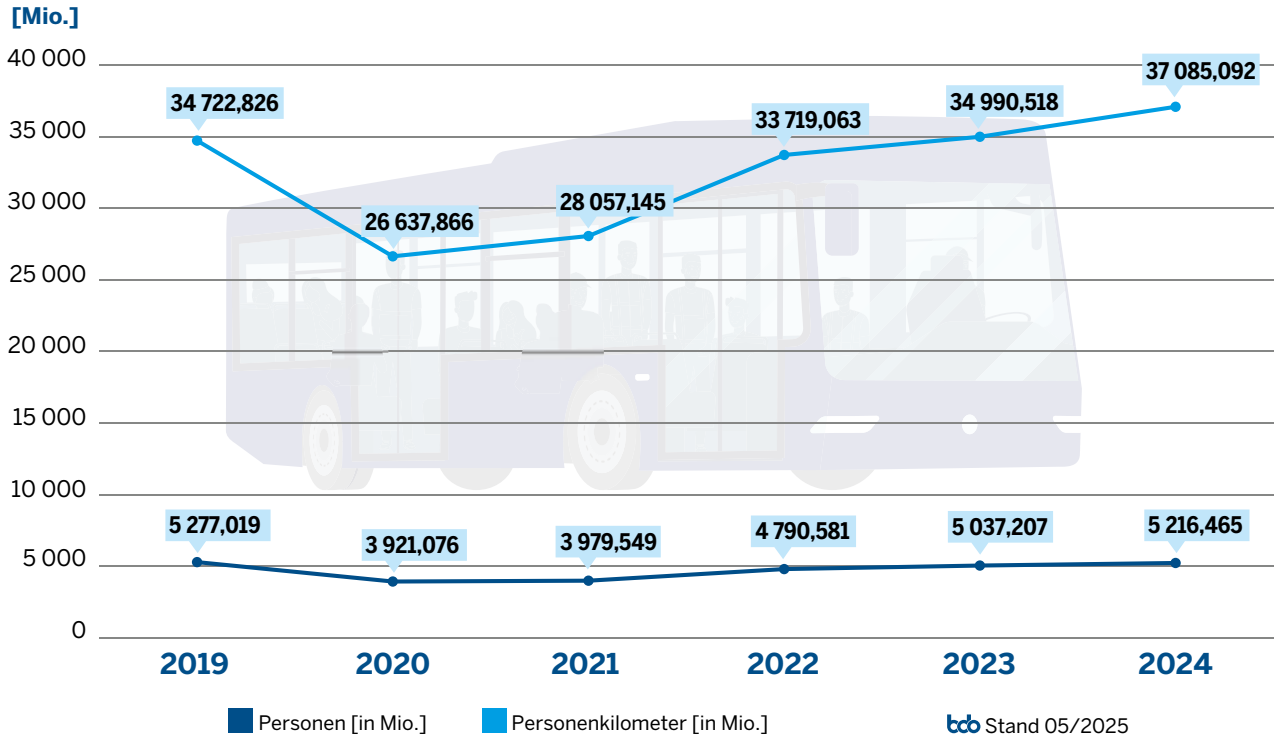
With regard to the management of regional and local public transport, rail transport and regional rail transport are the responsibility of the Länder, particularly local rail transport of passengers (*Schienenpersonennahverkehr*, SPNV). Each Land has its own policies, which may focus on all mobilities or rather public transport, or sustainability, or service accessibility, etc. The municipalities, cities and districts are responsible for the local public transport of bus, tramway and metro passengers (*öffentlichen Personennahverkehrs*, ÖPNV). Municipalities and associations of municipalities sign multi-year contracts with transport operators, often for a period of eight years or more (some people consider that this duration is too long and limits innovation), which determines the services to be provided, the financing, the prices, etc. The choice of operators is determined through an invitation to tender, but some major cities and metropolitan areas have their own transport companies and do not call on outside service providers. Municipalities must also take into account the new modes of transport (bicycles, scooters, carsharing, cargo bikes, etc.) which are not covered by the traditional legislation for public transport.

Public transport, with some 35 billion passenger-kilometers, plays a growing role in mobility in Germany. It is covered by the *Daseinsvorsorge* (which can be translated as "care for the essential for human existence"), a notion which has a deeper philosophical meaning than the French notion of public service, often defined from more of a legal standpoint. It indicates the State's responsibility to provide the goods and services necessary for the life of the population: the supplying of energy and water, transport, teaching and cultural establishments, health care and public safety. Concretely, it is often the municipalities which carry out this mission, particularly with their municipal authorities (*Stadtwerke*).

The statistics on local transport cover all modes. The last survey, Mobilität in Deutschland[30], carried out at the request of the Federal Transport Ministry, dates from 2023 and is supposed to be revised every three years. It indicates the number, the distance, the duration, and the modal sharing of the journeys (including walking), as well as the times and the reasons for the journeys as well as other socioeconomic data.

Furthermore, finer analyses can be carried out on the regional level (in a breakdown with 17 types of territories), or even on the level of certain cities (at their request). All of the data is published by the Ministry of Transports in the collection Verkehr in Zahlen (Transport in figures).

30. - Bundesministerium für verkher, *Mobilität in Deutschland – MiD* 2023, 240 p.



Use of public transportation in Germany, number of passengers and passenger-kilometers, 2019-2024

Source : BDO, *Entwicklung Fahrgastzahlen im ÖPNV*, 13 may 2025

%	Walking	Bicycle	Public transport	Auto: driver	Auto: passenger
Metropolitan areas	31	15	21	25	8
Small cities	22	6	7	51	14
Total	**26**	**11**	**11**	**40**	**13**

Modal breakdown of journeys according to size of cities

Source: Bundesministerium für Digitales und Verkehr, *Mobilität in Deutschland – MiD*, 2023, 24 p.

The main results of the inquiry distinguish the number of journeys (Wege) and the number of passenger-kilometers. They show, from 2002 to 2023, a slight decrease in the number of journeys and a slight increase in the number of passenger-kilometers. **Modal sharing is evolving gradually**, with an increase in the share of walking, bicycling and public transport (these three modes added together increased from 18% to 27% of passenger-kilometers from 2002 to 2023), a stability of "solo driving" journeys and a decrease of non-driver passengers in cars (see the diagram Modal Sharing, journeys and passenger-kilometers, walking, bicycling, public transport, driver alone, car passengers, page 8).

The modal sharing of mobility (measured by the number of journeys) varies significantly according to the type of territory, identified by the size of the cities (from village to metropolitan area).
Use of public transport has returned to the pre-Covid level in terms of the number of passengers and is growing in terms of passenger-kilometers.

GREECE

The Greek institutional system is organized in three levels: the State, thirteen regions and 325 municipalities (demes). The 54 departments no longer exist, they have become units represented on the regional council, where decisions are made. Competence for infrastructure and for transport services is divided between these levels, depending on their nature.

The following can be distinguished:
- The Attica region (Athens-Piraeus metropolitan area, which has 3.2 million inhabitants out of a national total of 10.5 million);
- The Thessalonica metropolitan area (one million inhabitants);
- The other regions.

Only the Athens-Piraeus and Thessalonica regions have multimodal mobility systems. All of the other local systems only have road transport.

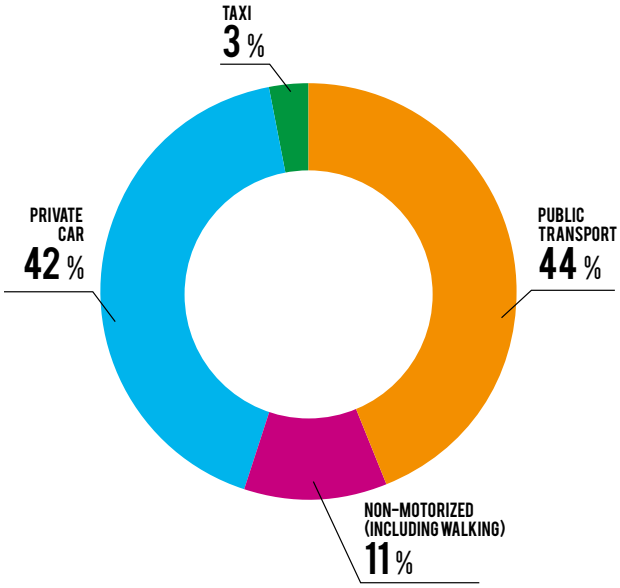
Since the law of 2022[31], the regions (and no longer the State) are public transport organizing authorities. They generally attribute services through invitations to tender, but there are cases of direct attribution. Although it remains **the largest operator, KTEL** (literally "common fund for bus receipts"), no longer holds historical rights (it was in a monopoly situation in each department) and is now subject to competitive tendering procedures.

A large share of the public transport services in the regions is handled by the companies of the KTEL Group. The KTELs, founded in 1952, were in charge of the interurban transport of passengers (and also packages) by bus and urban transport. There were initially 104 KTEL, 59 interurban and 45 urban. Each regional unit of Greece (former department) generally possesses its own autonomous KTEL organization. Since 2003, there are 62 KTEL, owning 4,200 buses. Each KTEL is now a limited company.

In the event of a change of operator following a tender offer, the new concessionary must take on the personnel and equipment of the preceding operator, with guarantees from the State to secure the process. However, municipalities have the right to have their own municipal urban transport company and to not use competitive bidding. Each city must develop a sustainable urban mobility plan covering all mobilities, including urban logistics. We observe the replacement of bus fleets with new buses using electricity or natural gas.

In Attica, public and non-motorized transport is more widely used than cars. The Athens metropolitan area has a complete transport system, with a regional train (Hellenic train managed by the Italian company FS), a metro (three lines, plus two in construction, 1.4 million passengers per day) and tramways (two lines) managed by the public company Stasy, as well as trolleybuses and buses managed by the public company OSY. OASA is its organizing authority (the largest in Greece) and is responsible for planning, supervision and operation of public transport.

It negotiates contracts with transport service providers. Its responsibilities include the control and supervision of all public transport operators, whether public (OSY, Stasy, transport of local communities) or private (Attica Public Transport Company, Attica Bus Company, Hellenic Train, etc.).



Modal breakdown of mobilities in Attica (number of journeys, %)

Source: Athentransport, 2024.

ITALY

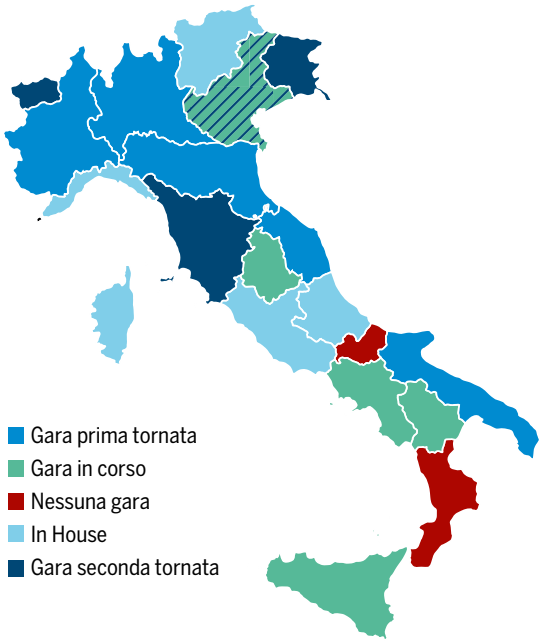
The governance of local transport in Italy mobilizes several categories of actors:

- The State, which plans and shares with the regions the resources from the National Transport Fund, which the regions can supplement in order to finance the public transport for which they are responsible.
- The regions, which play a central role of programming, coordination and control of regional and local public transport services requiring unit operation on the regional level. They operate through regional transport plans and triennial service programs. They also have a function of programming and administration of regional or local interest rail (whether the operation is conceded to Ferrovie dello Stato, the historical operator, or to other entities).
- The provinces (put aside for a time by the Renzi government) have, for transports that do not require regional coordination, the missions of planning of transport services on the provincial level, authorization and monitoring for private transport in coherence with the regional programming, as well as construction and management of provincial roads and regulation of the inherent road traffic. During the period of abolition of the provinces, the tasks were transferred to the regions and to the *Città Metropolitane*.

31. - Law n° 4974/2022 of 29 September 2022 (**Νόμος** 4974/2022), "Διατάξεις για τις δημόσιες υπεραστικές και αστικές τακτικές οδικές μεταφορές επιβατών – Αναδιοργάνωση των εταιρειών ΟΣΕ Α.Ε. και ΕΡΓΟΣΕ Α.Ε. και λοιπές διατάξεις" ("Provisions on urban and interurban public road transport of passengers, reorganization of the OSE S.A. and Ergose S.A. companies, and other provisions").

Mobility agencies: status by geographic zone

Source: Feder mobilita, *Governance e Gare in Italia*



The mobility agencies: status of the attribution of services

Source: Feder mobilita, *Governance e Gare in Italia*

- The metropolitan cities (*Città Metropolitane*), generally the main provincial municipalities, exercise the fundamental function of planning of public transport services in the metropolitan area, particularly through delegations which are granted to them by the municipalities.
- The municipalities are in charge of planning, regulating and monitoring municipal services and, for the main provincial municipalities, urban services.
- Regarding users, the Transport Regulation Authority (ART) seeks to protect their rights[32].

With the opening to competition for the attribution of public transport service concessions in 1997 (competition for the market based on invitations to tender), the State as manager became a regulator, with regulation institutions cooperating and sometimes overlapping: the Competition Authority (*Autorità Garante della Concorrenza e del Mercato*, AGCM), the Anti-Corruption Authority (*Autorità nazionale anticorruzione*, Anac) and the Transport Regulation Authority (*Autorità di Regolazione dei Trasporti*, ART).

The planning and management of public transport is handled by the Mobility Agencies. In various forms, they are present in seven regions (out of 21 regions and autonomous provinces) covering 55% of the Italian population.
In the fourteen other regions and autonomous provinces, the competences remain in the hands of the following authorities:

- The region for all services (Friuli-Venezia Giulia, Veneto, Tuscany, Basilicata and the autonomous provinces of Trento and Bolzano) or only for rail and extra-urban services (with the municipalities having the competence for urban services (Abruzzo, Molise, Sardinia, Sicily).
- The province in Puglia, in Veneto and in Marche.

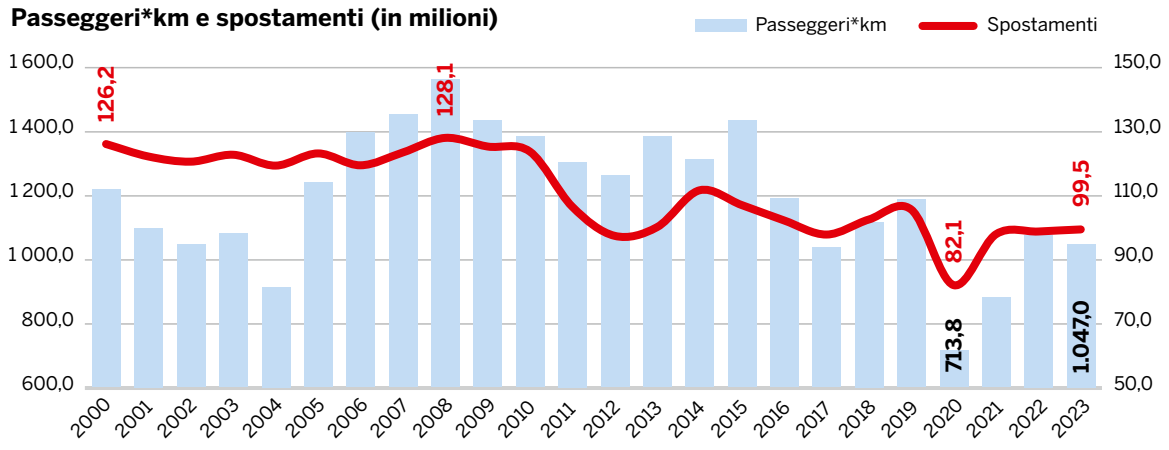
The institutional forms, the management models, the attribution of contracts (by tender offers or directly) vary from case to case: the landscape of solutions is very heterogeneous. In many cases, Treniatalia signed direct agreements for the operation of regional trains.

One of the two maps shows the institution responsible for the mobility agencies (regional agency, provincial agency, region and agency, region, region and municipalities, provinces); the other one shows the modes of attribution of public service transport contracts (tender offer for the first round, tender offer in progress, no tender offers, direct management, tender offer for the second round).

Knowledge of the mobility of Italians is now based on detailed and reliable data provided by the Higher Institute for Training and Research in the Field of Transport (Isfort), the research center of the Ferrovie dello Stato (FS) and a Technical Mission Structure (STM) of the Ministry of Infrastructure and Transport (MIT).
The 21st Report on the Mobility of Italians[33] is matched with a strong sub-title: “a radical change is necessary.”

32. - The OPSTE compared the role of regulation authorities in Europe in *bulletin Transport / Europe n° 9* of September 2023

33. - Isfort, *21° Rapporto sulla mobilità degli italiani C’è bisogno di una scossa*, 26 November 2024, 186 p.



Number of passenger-kilometers and number of journeys in Italy, 2000-2023

Source : Isfort, *21° Rapporto sulla mobilità degli Italiani*, 16 november 2024

It shows a clear change in mobility practices, linked in particular to the effects of Covid and the aging of the population, with a decrease in both the number of journeys and in passenger-kilometers, especially in public transport. Is such a system sustainable?

The number of daily journeys for the entire population decreased from 2.63 in 2000 to 1.99 in 2023. The daily travel time, after a peak of 67 minutes in 2008, was 53 minutes in 2023 (after a low point of 48 minutes in 2020, during the Covid crisis).

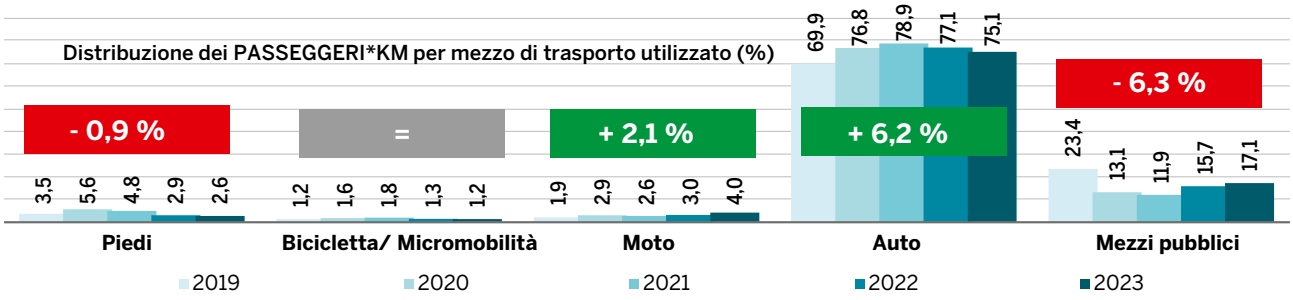
The passenger levels for rail show that interurban and regional trains (subsidized) have not yet returned to the levels of 2019, while high-speed train traffic is increasing. The breakdown between transport modes (in terms of passenger-kilometers and not journeys) shows, from 2019 to 2023, the increase for motorcycles and cars and the decrease for walking and public transport.

The differences in mobility practices result in particular from income differences. The table page 25 classifies the municipalities according to the average annual income of the inhabitants. The poorest municipalities are those where walking, bicycles and public transport are used least and where people depend more on motorcycles and cars. The richest municipalities are those where the “rate of sustainable mobility” is the highest.

This social divide is also geographic: it differentiates city and country, small cities and large cities, city centers and peripheries in the large metropolitan areas and, according to Italian geography, the south and the north of the country.

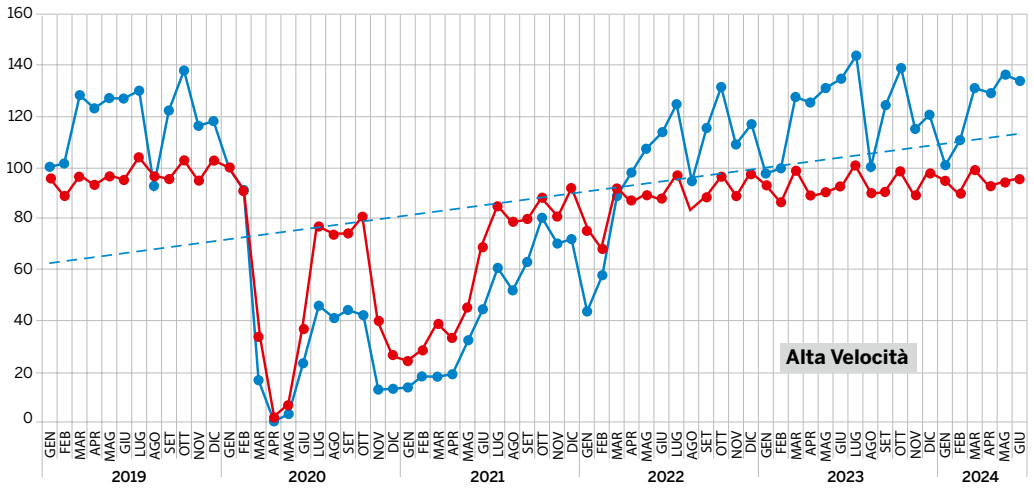
For all mobilities, local public transport is provided by about 880 companies, with 117,000 employees, with service on the order of 1.8 billion vehicle-kilometers and 225 million train-km which transport each year 5 billion passengers for a total production value of about 12 billion euros.

In the long term, scenarios for 2034 and 2044, with more or less optimistic hypotheses around the average option, conclude that there will be a significant drop in mobilities for young people and an increase for older people, with an overall stagnation between now and 2034 and an overall decrease in 2044. Does this scenario shed light on a broader European outlook, with the hypothesis of continued aging of the population, and over time its decrease unless massive immigration offsets it?



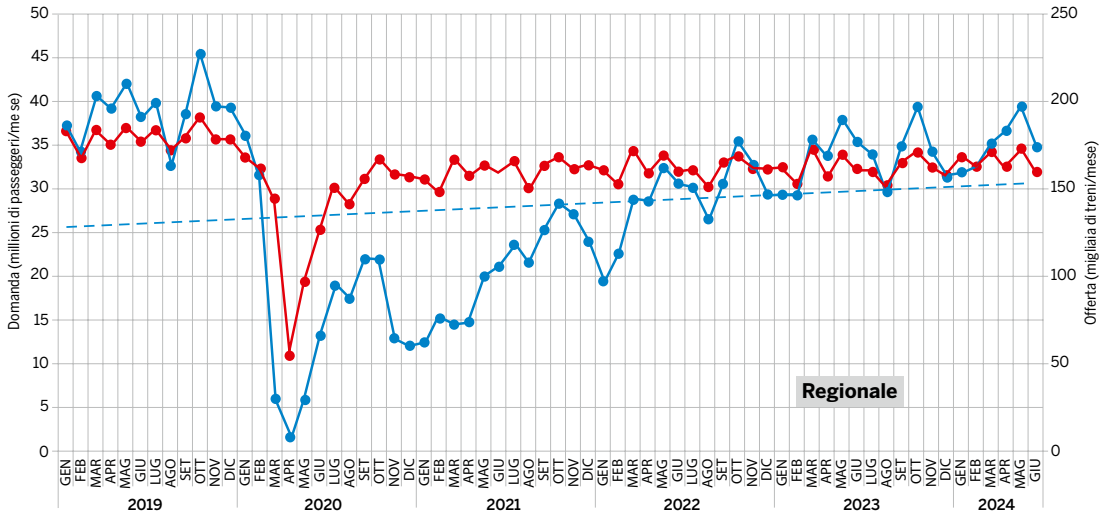
Breakdown of passenger-kilometers by means of transport, %, 2019-2023

Source: Isfort, *21° Rapporto sulla mobilità degli Italiani*, 16 November 2024



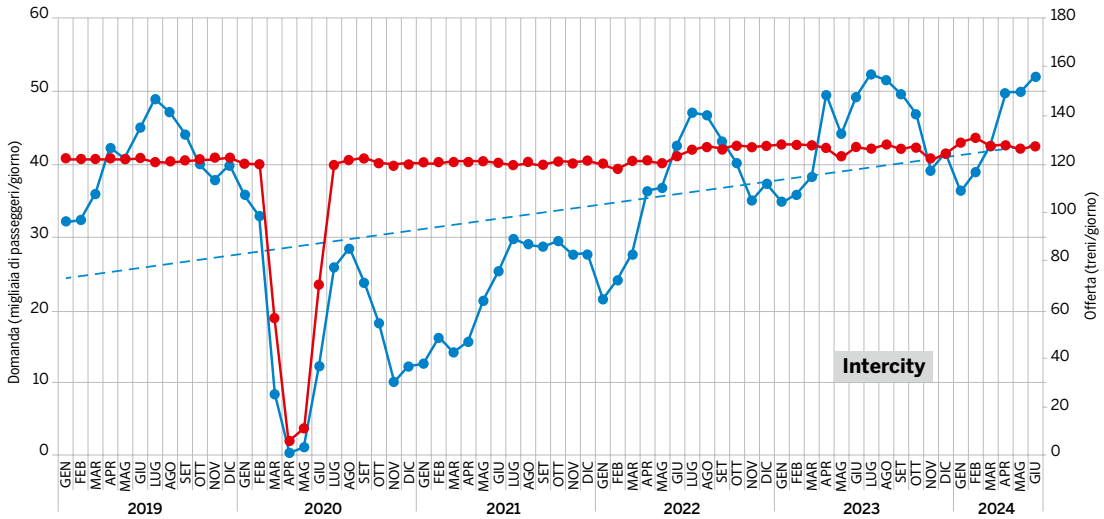
Base 100 = valore gennaio 2020
Fonte : Elaborazioni Struttura Tecnica di Missione del MIT su dati Trenitalia e NTV

Domanda AV — Offerta AV



Base 100 = valore gennaio 2020
Fonte : Elaborazioni Struttura Tecnica di Missione del MIT su dati Trenitalia

Domanda REG — Offerta REG



Base 100 = valore gennaio 2020
Fonte : Elaborazioni Struttura Tecnica di Missione del MIT su dati Trenitalia

Domanda IC/ICN — Offerta IC/ICN

Rail mobility trends: supply (red) and demand (blue) 2019 - 2024

Source: Isfort, *21° Rapporto sulla mobilità degli Italiani*, 16 November 2024

Fasce di reddito medio comunale	Piedi	Bici / Microm obilità	Moto	Auto	Mezzi pubblici	Tasso di mobilità sostenibile	Indice sintetico di sistenibilità
Meno di 15 000 €	15	-	7,4	72	5,5	20,6	59
Tra 15 000 e 20 000 €	16,9	2,5	3,4	72,7	4,5	24	76
Tra 20 000 e 25 000 €	17,7	3,5	4,6	67,5	6,8	27,9	89
Più di 25 000 €	21,6	5,4	4	56,4	12,5	39,6	131
Media complessiva	18,9	3,9	4,2	64,6	8,4	31,2	100

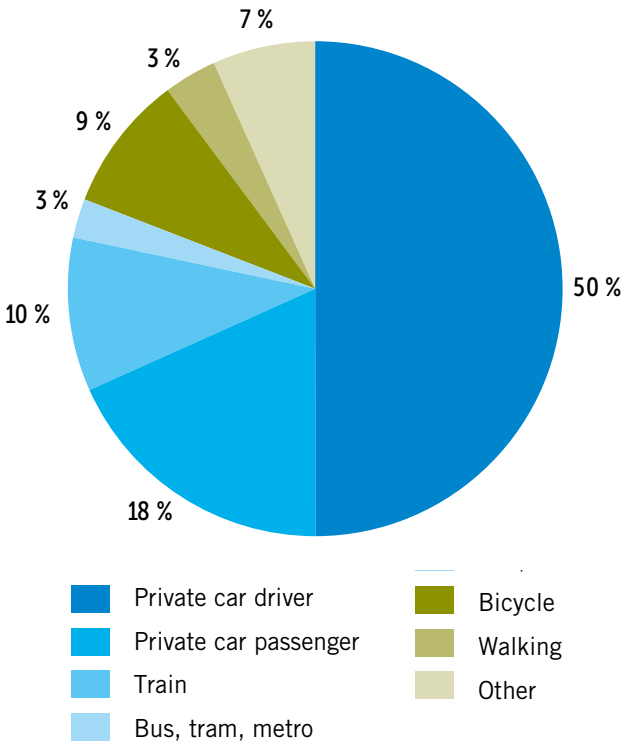
Modal sharing of mobilities according to the incomes of the inhabitants of the municipalities

Source: Isfort, *21° Rapporto sulla mobilità degli Italiani*, 16 November 2024

THE NETHERLANDS

The Netherlands have only 342 municipalities (for a total population of 18 million inhabitants). They are in charge of urbanization, teaching, transport, welfare and social affairs.
21 water authorities (*waterschappen*), centuries-old institutions, are in charge of the regulation of the water level using pumping stations and locks, treatment of wastewater, the upkeep of dykes and other structures for protection against flooding, and (among other things) the management of nature in and around the water.
Twelve provinces (with an average population of 1.5 million inhabitants) have a delegation (Provincial Councils) and are in charge in particular of land use development and infrastructure. They are public transport organizing authorities.
Between municipalities and provinces, two specific "transport regions" were established by law in Amsterdam and Rotterdam-The Hague.
On the national level, the States General include two chambers, the first (the Senate) elected essentially by the Provincial Councils and the second elected by universal suffrage.
Most of the resources of the territorial authorities come from the budget of the central government.

Since the Law on passenger transport of 2000[34], the provinces are, more than the municipalities, in charge of public transport. The provinces have been attributing **unimodal or multimodal concessions** (train and bus) to operators through invitations to tender, for about ten years in general. However, the Parliament just adopted a law authorizing all of the organizing authorities to form their own public companies, designated as operators, without going through invitations to tender. This possibility was already offered to the authorities of the metropolitan areas of Amsterdam and Rotterdam-The Hague, where public authorities are in charge of the central part of public transport systems (tram, metro and urban bus) while the suburban networks are subject to competition through invitations to tender.



Modal sharing in the Netherlands, passenger-kilometers, %, 2023

Source : *CBS*, sept. 2024

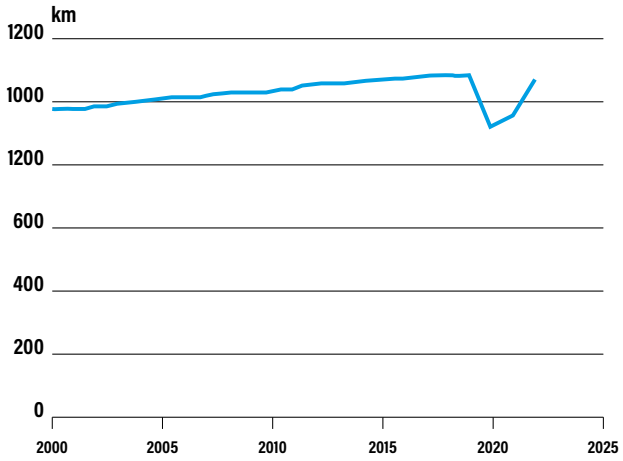
The country is densely populated in almost all areas and **rail** provides excellent coverage of the territory, with high service frequency (at least two trains per hour and per direction on all of the lines and often considerably more). For the moment, the operation of the national network is assigned directly to the historical operator, NS, to preserve the coherency of the whole system and to ensure the reliability of the services. This formula is being challenged by the European Commission in the name of the principles of competition, and it has initiated an infraction procedure.

The regional lines at the extremities of the national network have however, gradually over the past twenty years, been subjected to competition through invitations to tender, in unimodal or multimodal concessions attributed by the Provinces.

34. - Wet personenvervoer 2000

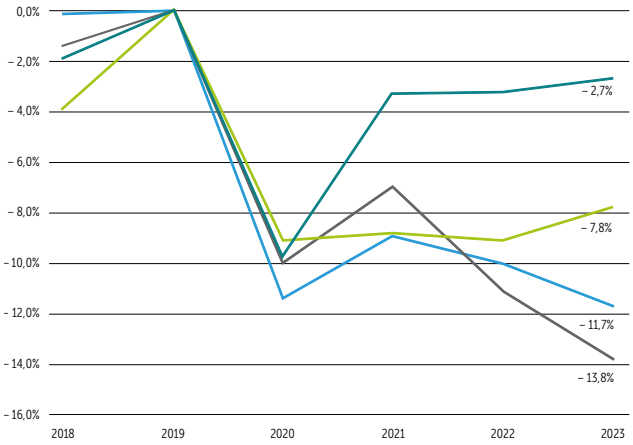
Railroads, Netherlands and neighboring countries, lines and service frequency

Source : NS



Distance traveled by bicycle per inhabitant

Source : CBS, Mon / Ovin / Odin



Decrease in service (bus, train, metro, regional train)

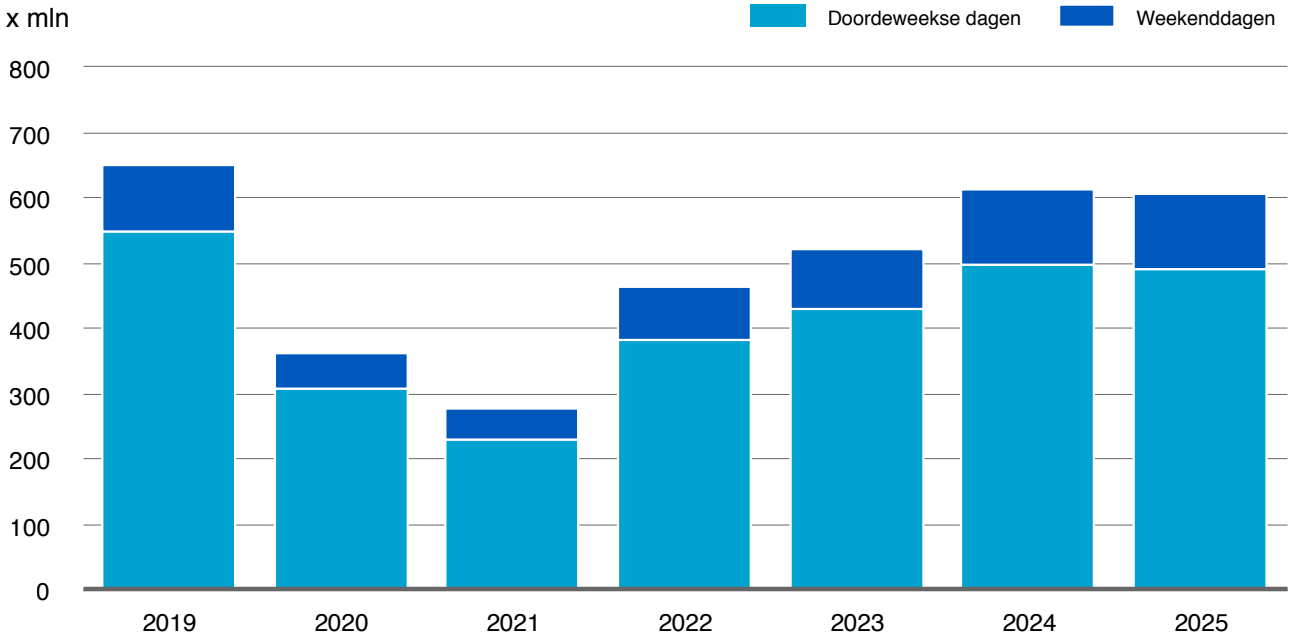
Source : KpVV, CROW

Modal sharing for all journeys shows in particular the substantial share of bicycles, with an annual distance traveled (1,100 km) which is far above the European average. In large cities, bicycling accounts for between 30% and 40% of journeys, on the same level as cars.

Public transport traffic has not yet returned to the pre-Covid level for weekdays but has increased for weekends.
Over the same period, public transport services decreased to increase productivity and reduce costs in a period of budget cuts. At the same time, the bus fleet became significantly greener, with a majority of vehicles which are now of norm Euro 6 or electric.

Over the long term, since 1950, mobility has increased considerably. While it was mostly provided by train and bus in the first years, there was a massive switch to cars as of the 1960s. In volume, mobility seemed to have reached a plateau as of the 2000s: will this stagnation continue? Since then, the total transport volume has changed little but its breakdown by mode (and thus by energy mode) reflects the efforts to reduce its local and overall disturbances.
In terms of general transport policy, the Long-Term Rail Vision published in 2014 recommended an increase of rail frequencies, then this was extended in 2019 to an increase in frequencies for all local transport – rail and road (Public Transport Vision 2040[35]).

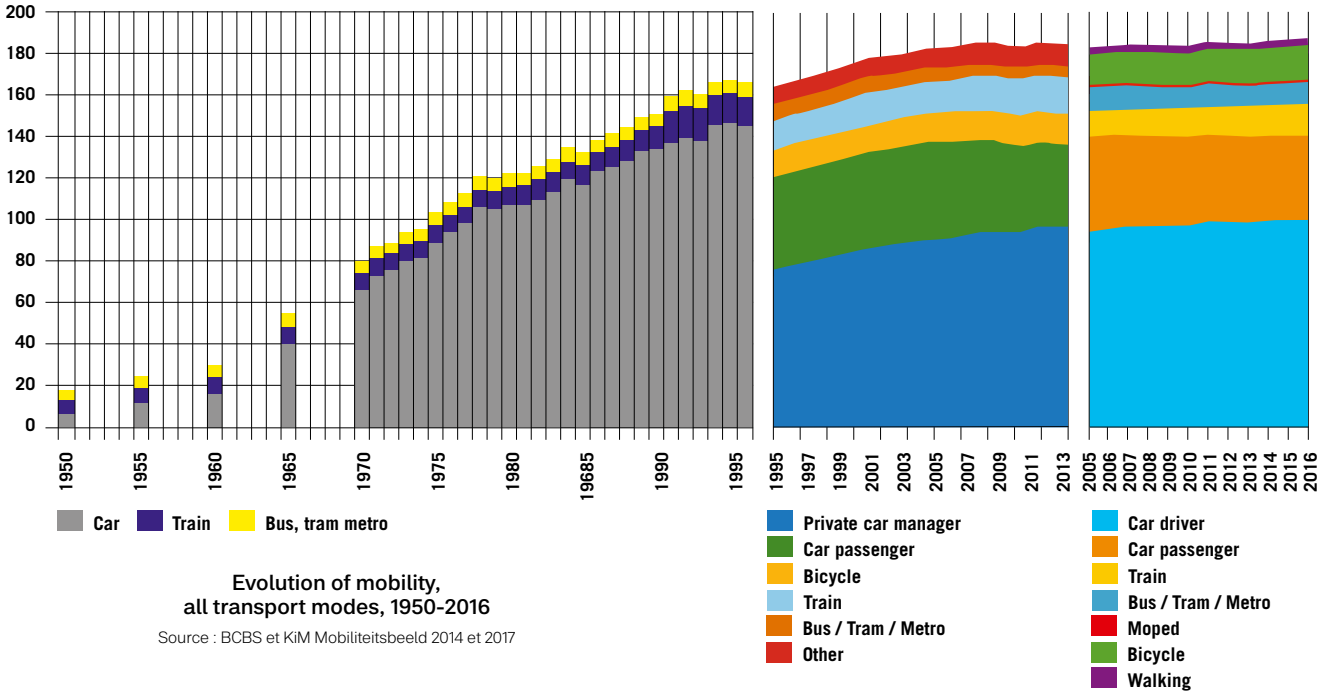
Check-ins in het openbaar vervoer, januari t/m juni



Use of public transport, weekdays and weekends

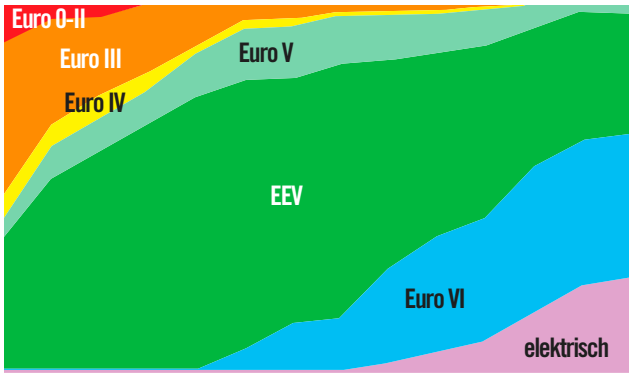
Source : CBS, Translink

35. - Public Transport in 2040, Outlines of a vision for the future, summary in English



Evolution of mobility, all transport modes, 1950-2016

Source : BCBS et KiM Mobiliteitsbeeld 2014 et 2017



Greening of the bus fleet

Source : *KpVV, CROW*

This ambition was downgraded in 2023, because of Covid and inflation, but these orientations remain a catalogue of ambitions and not an adopted policy.

The case of the Amsterdam metropolitan area (specific transport region status) is significant. It defined a multimodal vision for the future of its mobilities, which includes:

- The adaptation of urbanization to the quality of accessibility and proximity (polycentric city).
- The slowing down of the growth of mobility.
- The improvement of urban and regional bicycling networks.
- The development of regional hubs linked by corridors, in proximity to and further from cities.
- The integration of freight transport in the accessibility and urbanization objectives.
- The increase in the scale of public transport, progressively dissociating the networks in terms of infrastructure and services.
- Lastly, the continuation of the PDCA (Plan, Do, Check, Act) cycles for the carrying out of its policies.

POLAND

The **territorial administration** of Poland reflects a historical tradition, in which the starostas (senior officials of the crown) had a certain power with respect to the king. There are now three territorial authority levels, with sixteen voivodships (*województwo*), 380 districts (*powiat*) and 2,479 municipalities (*gmina*).

The voivodships, which have regional assembly (Sejmik), a president appointed by the central government and a marshal elected by the regional assembly, are in charge of the development strategy, the budget and local laws. They have competences in public education, health protection, culture, social welfare, territorial management, the environment, scientific development and lastly public transport and roads.

The development of the voivodships is based on planning documents which are regularly updated and which include a part devoted to transport (for sustainable mobility). Each voivodship drafts its transport plan according to its own method, generally including a public consultation. They include an appraisal of the transport system, the definition of objectives, a long-term vision and development scenarios (action priorities, network models, financial analysis and risk analysis).

The districts, re-established in 1998, are chaired by a starosta elected by the district assembly. They are in charge in particular of the upkeep and development of transport infrastructure. They are competent for interurban transport, in harmony with the regional plan and the national plan. The utility of the districts and their functioning costs are now being discussed.

millions of passenger-km	2000	2005	2010	2015	2020*	2025*	Annual growth 2000-2025
Urban bus	16 405	13 334	13 361	12 495	12 542	12 670	- 1,0%
Individual cars	39 011	45 274	57 267	65 159	81 465	89 733	3,4%
Motorcycle and scooter	211	240	378	502	734	899	6,0%
Tramway	3 287	2 833	2 802	2 908	3 042	3 175	-0,1%
Trolleybus	129	92	86	98	108	117	-0,4%
Metro (Warsaw)	252	427	673	874	576	1 075	6,0%
Personal bicycle	628	720	957	1 107	1 380	1 742	4,2%
Public bicycle	0	0	0	16	27	39	9,5%
Pedestrian traffic	3 979	3 364	2 859	2 493	2 602	2 745	- 1,5%
TOTAL	**63 901**	**66 284**	**78 383**	**85 652**	**102 476**	**112 195**	**2,3%**

Urban transport in Poland (passenger-kilometers, 2000-2025)

Source : J. Burnewicz, Prognoza transportu Polski do 2030 r. (Polish transport forecasts until 2030), Ministry of Infrastructure, Warsaw 2017; *Transport – Activity results,* GUS, Warsaw 2001-2025; data from the electronic sites of the Polish metropolitan areas; calculations of the author.

The municipalities seem to be the most efficient administrative level. Municipal roads represent 60% of the entire length of the Polish network. The municipalities administer urban transport, with a legislative framework which is less restrictive than for the districts and the voivodships. There are also inter-municipal cooperation groups. For the moment there is only one metropolitan area, in Silesia, but this formula is being considered for Warsaw and other large cities.

The characteristics of local mobility in Poland result from a profound transformation over the past twenty years. The average distance traveled per year and per inhabitant, all modes taken together, rose from 7,000 km to 12,000 km between 2000 and 2024, catching up on the substantial lag with the countries of Western Europe (the European average is 16,000 km).

The rate of household car ownership is now very high (88%) and more than one Pole out of four owns two cars.

About 60% of Polish households use public transport, and this percentage is higher in cities (67.9%) than in rural areas (43.1%). Rail transport plays a major role in regional mobility, while regional buses have lost two thirds of the traffic since 2000 (from 1,600 million passengers per year to 500 million), because of the increase in the number of private cars. Regional trains benefited from modernization work starting in 2010. In 2024, they transported 325 million passengers, which represents 80% of all passenger rail traffic. Over the same period, the share of public transport decreased sharply for urban transport, from 6 billion passengers in 1990 to 4 billon in 2024.

To specify this data, we can estimate that the local transport of passengers in Poland represents more than 80% of the total number of passenger journeys and more than 30% of the number of passenger-kilometers traveled (of which about 23% for urban transport). It involves several means of transport:

- Public transport (bus, tramways, trolleybus, metro). Individual motorized transport (individual cars, motorcycles, scooters).
- Non-mechanized individual transport (bicycling and walking).

The statistics on urban transport are poor but taking into account measurable factors that determine urban mobility (the number and the capacity of urban vehicles, the percentage of residents using public transport, the vehicle occupancy rate, frequency of use, average journey distances, etc.), we can make the following estimations for all of Poland.

In summary, over the period 2000-2025, the overall trend of average annual growth of urban transport in Poland was + 2.3%, including public transport – 0.7%, individual motorized transport + 3.4% and non-motorized individual transport – 0.1%. These indicators are moving away from the ecological targets.

Following the massive increase in car ownership, facilitated by a major program of modernization of road infrastructure (with in particular the construction of 7,000 km of highways), the phase of a lack of parking spaces and the congestion of city centers has arrived. Is Poland entering a new phase of evolution of its mobility system?

ROMANIA

The organization of mobilities is divided between several levels of public administration and, according to the principle of subsidiarity, the European Union only gets involved in the field of transport to the extent that the stakes involved are on the EU level. Even so, the European doctrinal (for sustainability) and financial framework plays a significant role in the evolution of Romanian transport, and especially local transports.

The TEN-T regulation, revised in 2024, establishes a program of infrastructure covering all the countries of the EU and extending to certain nearby countries (Balkans and Ukraine). The countries are committed to implementing this on a specific schedule, for the central network and the overall network (extended). The last revision focused on the network nodes, the large cities or metropolitan areas which connect the regional, national and European infrastructures.

The European Union supports the evolution of urban mobility in a rationale of sustainability, in Romanian cities, through the financing of local and metropolitan area transport systems (the functional metropolitan areas).

The instrument of planning of transport of large traffic and transport infrastructures on the national and regional scale is the Master plan of transports for strategy and planning[36]. Since 2013, on the urban scale, the instrument of planning of urban mobility is the SUMP, which offers a new, integrated, multidisciplinary and multimodal approach to modes of travel.
Since 2023 urban mobility has been covered by a specific law, Law n°155/2023 concerning sustainable urban mobility[37].

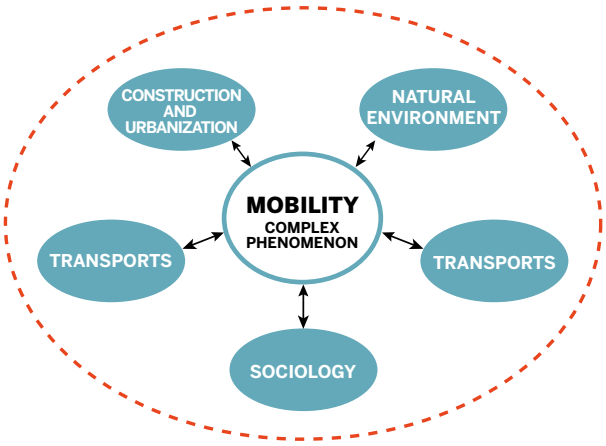
Monomodal sectoral studies can complement and detail the SUMP, for example the Bucharest Bicycle Masterplan (2025).

Urban mobility and multimodality
Schéma : Mihaela Negulescu

36. - *Master Planul General de Transport*
37. - Lege nr. 155 din 30 mai 2023 privind **mobilitatea urbană durabilă**

Łódź, Poland

In institutional terms, the metropolitan areas include **Metropolitan Transport Authorities** (under the supervision of the Ministry of Transports) which are intermunicipal development associations (for example, the Intermunicipal Development Association for Bucharest-Ilfov public transport and the Brașov Transport Association acting as a Metropolitan Transport Authority).
On the local level there are specialized departments within city halls or arrondissement town halls (for example, the Urban Mobility Service at the City Hall of sector 4). Transport in the strict sense is provided by formerly public but now more and more often private operators. For the management of transport systems, we have no detailed and regularly collected data.
The territorial divisions include administrative divisions and technical divisions. They vary depending on the territory involved. The Bucharest metropolitan area is the only city in the country that is cut into sectors. The metropolitan areas are functional urban zones cut according to the daily commuting flows around a central city. The UAT is the reference territorial unit (city, rural municipality, village). The Județ is an intermediary administrative division between UAT and region. A sustainable urban mobility plan is established on the corresponding level. The regions are territorial economic development units, generally correlated with the historical regions.

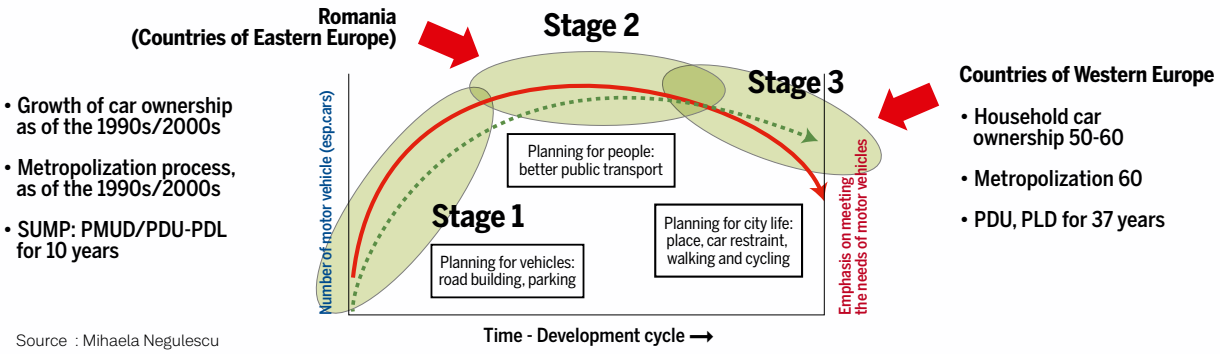


Urban mobility, comprehensive planning and interdisciplinarity
Source : Mihaela Negulescu

By comparison with other European countries, mobility policies are relatively recent in Romania and are part of an outlook launched by the Green Deal with the Strategy for sustainable and intelligent mobility of 2020[38]. These policies aim to encourage changes of travel behavior moving away from cars, allowing for the recovery of public space and urban regeneration. They include numerous hard and soft measures.

A diagram of the long-term evolution of urban transport policies

In the following diagram, the evolution of urban transport policies in Europe since the second half of the 20th century is broken down into **three phases**. For the countries of Western Europe, mass access to cars and metropolization began in the 1950s and 1960s. Urban transport policies aimed to adapt cities to cars (reinforcement of roads, parking). As this expansion is reaching its limits (congestion, pollution), a second phase involves reinforcing public transport. Lastly, in a third phase, the policy focuses on the city and quality of life in a broader sense, with a redistribution of the public space (with more space for walking, bicycling, leisure, etc.).
The countries of Eastern Europe, including Romania, are presented as being on the same trajectory in three stages but with a time lag of about thirty years. We can imagine that they will not catch up in the same ways, and that "shortcuts" will allow them to transition more rapidly towards a policy of sustainability, particularly due to incentives from the European Union.



Source : Mihaela Negulescu

38. - Communication of the Commission to the European Parliament, to the Council, to the European Economic and Social Committee and the Regions Committee, *Sustainable and Smart Mobility Strategy – putting European transport on track for the future*, 9 December 2020

Some aim to limit the possession and use of personal cars through taxes on vehicles, fees for parking, limitation of access to certain areas (but ZFEs have not yet been implemented), reduction of on-street parking, reduction of the number of traffic lanes allowing for the creation of corridors reserved for public transport and bike lanes, speed limits, etc.

Other measures aim to develop an alternative to the automobile: modernization and extension of public transport (in terms of capacity, speed, comfort, etc.), the facilitation of multimodality with the MaaS, the use of bicycles, making some streets into pedestrian zones, etc. Parking outside of the public space remains very insufficient. The fleet of public transport buses is evolving towards electric and hybrid models.

However, public opinion is not in agreement with the objective of limiting automobile use and the evolution is slow. Romania has inherited the history of late massive access to cars (access still in progress, with a rate of household car ownership on the order of 450 vehicles for 1,000 inhabitants, while the EU average is 550). The same lag is also affecting the phenomenon of metropolization. We thus observe a continuation of a policy of adaptation of the city to cars, as was the case in the western part of the EU in the 1960s, rather than a policy of sustainable mobility. The expertise in terms of sustainable mobility is also insufficient.

In the following diagram, the evolution of urban transport policies in Europe since the second half of the 20th century is broken down into three phases. For the countries of Western Europe, mass access to cars and metropolization began in the 1950s and 1960s.

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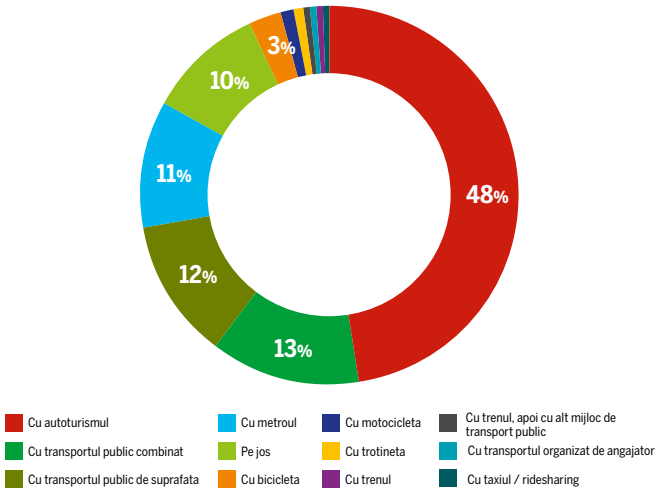
We do not have detailed information about mobility in Romania, and regarding the modal structure of urban travel. We do know that the rate of household car ownership is not homogeneous throughout the country; the rate in Bucharest is notoriously high (640 vehicles for 1,000 inhabitants). Since 2014, data allow us to describe the situation in some cities, particularly in the Bucharest metropolitan area and in its central zone.
(Automobile, combined transport public, surface public transport, metro, walking, bicycling, motorcycles, scooters, trains and other modes of public transport, transport organized by the employer, train, taxi and carsharing)

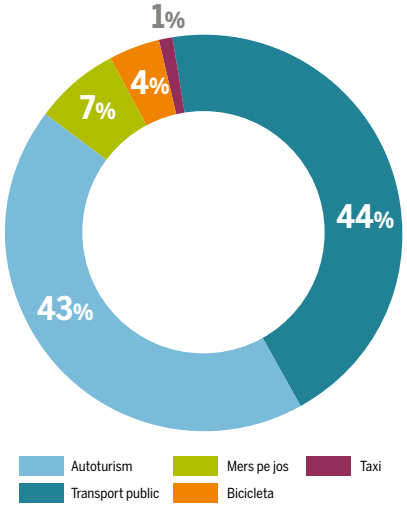
On the scale of the metropolitan areas and the central district, the shares of the automobile and all public transportation are on the same order of magnitude (more than 40% each).



Modal structure of journeys
Metropolitan area level (2023)

(Automobile, combined transport public, surface public transport, metro, walking, bicycling, motorcycles, scooters, trains and other modes of public transport, transport organized by the employer, train, taxi and carsharing)

Source : Plan de Mobilité Urbaine Durable Bucarest – Ilfov
(Planul de Mobilitate Urbană Durabilă pentru Regiunea București – Ilfov, 2025).



Modal structure of journeys
Local level (UAT Bucharest, 2023)

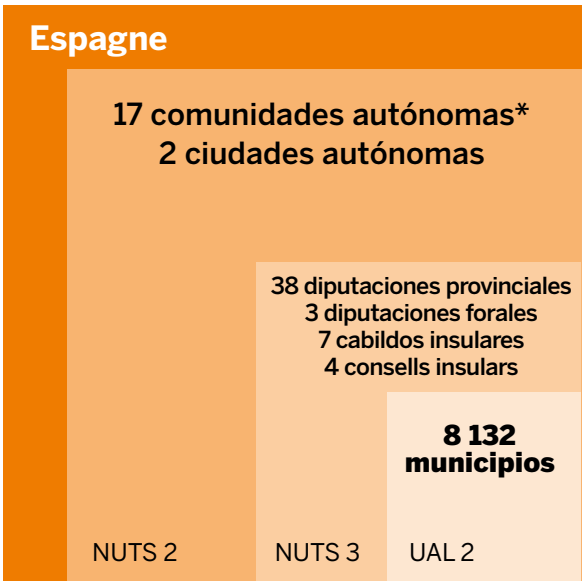
(Public transport, automobiles, walking, bicycles, taxi)

Source : Plan de Mobilité Urbaine Durable Bucarest – Ilfov
(Planul de Mobilitate Urbană Durabilă pentru Regiunea București – Ilfov, 2025).

SPAIN

The year 2024 in Spain was marked by various difficulties which created tension in the political system to respond to crises: impossibility of forming majorities in the parliaments to vote on budgets (neither for Spain, nor in Catalunya, nor in Barcelona), poor coordination between institutional levels directed by opposing parties (increasing political polarization), a poorly-managed natural disaster in the Valencia region, etc. The issue of the governance of local transport is being addressed in this context.

Spain is a decentralized country divided into 17 autonomous communities and two autonomous cities (NUTS 2), 41 delegations and eleven other island entities (NUTS 3) and lastly 8,132 municipalities.



Territorial institutions in Spain

Source: *Contador de entidades locales.* Ministerio de Hacienda y Administraciones Públicas, Gobierno de España; et INE.

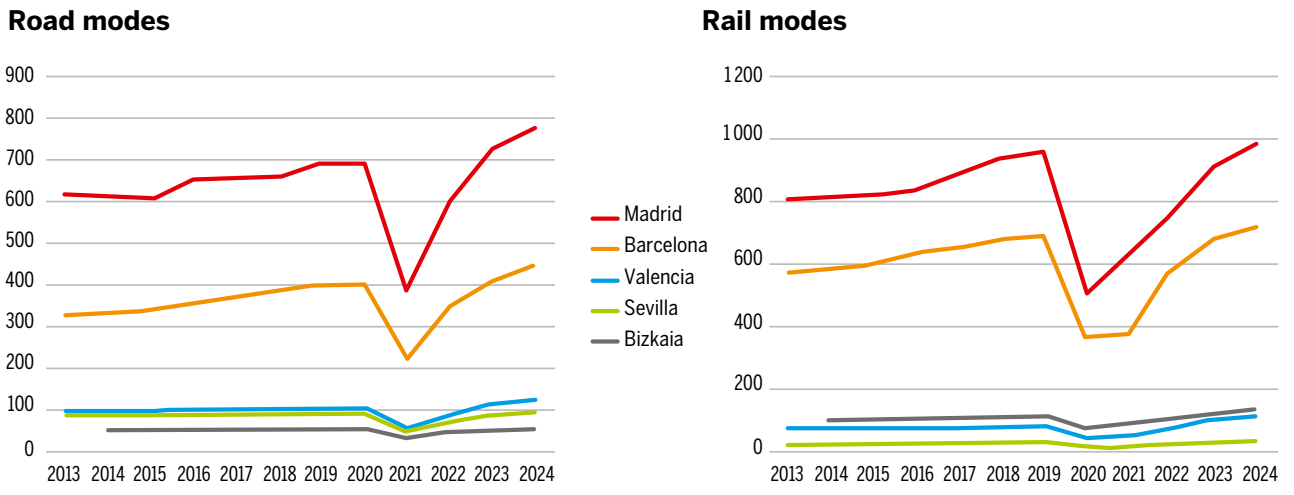
Party in first place in the municipal elections of 2023

Source : RTVE

The elections on the level of the autonomous communities did not all occur at the same time. The recent elections between 2022 and 2024 brought as the leading parties, depending on the case, the Popular Party, the Socialist Party, and the Basque Nationalist Party.

The public transport authorities are established by the autonomous communities in the large metropolitan areas, in partnership with other local authorities. These authorities are responsible for transport planning, contracts with operators, prices, and passenger information. The Basque Country and Catalunya communities are reinforcing their resources for rail.

The Basque Country has established its own rail company, Lottu, but Renfe (the historical national rail company) remains its operator. Catalunya is changing its operator with its new company shared between Renfe (51% share) and the autonomous community (49%), with the personnel maintaining a possibility of professional mobility within the national rail system.



Use of public transport in the five largest metropolitan areas of Spain - Number of journeys, 2013-2024

Source : Données OMM.

Some autonomous communities have established a legislative framework for mobilities, but they are few. The National Congress adopted a **draft framework law on mobilities**[39], which must be examined by the Senate, but the outcome of the process is still uncertain.

A Metropolitan Mobility Observatory (MMO) supported by the ministry gives an overview of the levels of use of public transport in large cities. We observe in the five largest metropolitan areas a recovery after the health crisis (there was a fairly rapid return to the levels of 2019), and then a continuation of the growth in use, both for road and for rail.

We observe that in these large cities the volume of rail transport is greater than that of road transport by bus. A growing number of cities are investing in heavy urban transport modes (tramway, metro).

Two complementary approaches, from the mobility inquiries in the two main metropolitan areas, allow us to refine our understating of urban mobility. Modal sharing is not the same for men and for women. Women make greater use of active modes (walking and bicycling) and public transport, while men make greater use of cars. Walking and bicycling are mainly used for journeys within the city while public transport and cars are also used for internal journeys, but still more for external journeys.

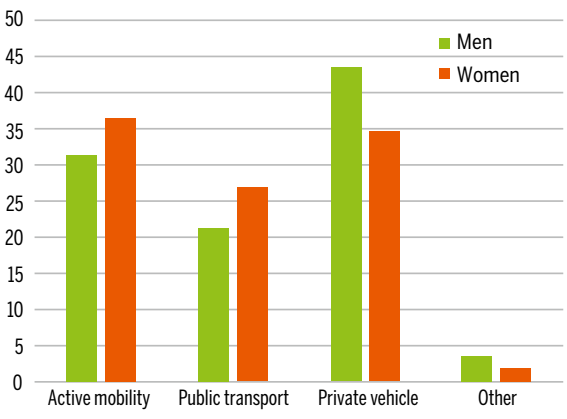
Party in first place in the municipal elections of 2023

Base map: *Mapa político* de España 2024, Instituto Geográfico Nacional.

The issues for local journeys are obviously linked to broader **urban issues**. The gentrification of central neighborhoods leads to a displacement of the population towards the periphery and generates new transport needs. Heavy transport development operations are also urban reconfiguration operations.

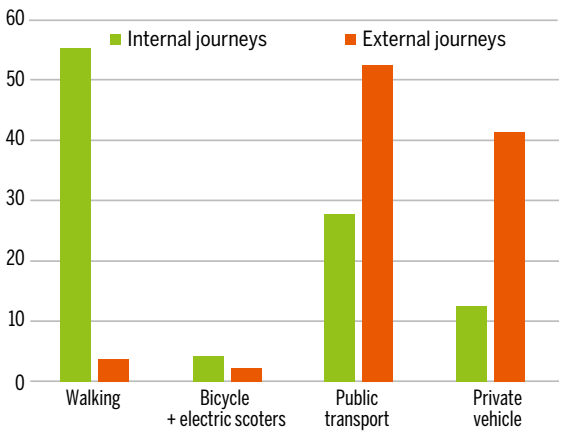
The service quality of regional trains is insufficient, and results in part from the fact that priority was long given to the construction of a network of interurban high-speed lines. The development of active modes supposes a new sharing of roads and streets, etc.

Madrid 2018



Source : own preparation from OTLE data.

Barcelona 2024



Source : own preparation from data of the Ajuntament de Barcelona: *Dades básiques de mobilitat*.

Modal distribution of urban journeys, %

39. - Law 9/2025, of 3 December, on Sustainable Mobility.

SWITZERLAND

The organization of transport is part of the federal structure of Swiss institutions. These three levels of competence are clearly distinguished, but efficiently interfaced.

The Helvetic Confederation is responsible for long-distance public transport (which is profitable overall) but is also involved, with the cantons, in regional transport and contributes to transport infrastructure in the metropolitan areas. The main rail company in the country, the Swiss Federal Railways (SBB, Chemins de fer fédéraux, CFF), is a public law limited company of which the capital is totally held by the Federal Government. In the organization of the federal administration, transports come under the auspices of the Federal Department of the Environment, Transport, Energy and Communication (Detec), which has six federal offices (ministries): The Federal Office for Territorial Development (ARE), Transports (OFT), Roads (Ofrou), Civil Aviation (Ofac), Energy (Ofen), Communication (Ofcom) and lastly the Environment (Ofev).

The Confederation manages transport **on a systemic level** to ensure the efficiency and coherence of the transport system in Switzerland. It attributes transport concessions, organizes legislation, orders and the control associated with transport systems and their facilities. It handles the management and distribution of federal financing directly to companies and projects of national interest or to the cantons and also the organization of the financing from federal revenues. The uncovered costs of regional transport (total costs minus income from tickets) are covered in equal shares by the Confederation and the cantons. However, this support only applies to transport with minimum profitability and serving a certain number of inhabitants.

The 26 cantons (including six half-cantons) are Federated States and are responsible for regional transport but are also involved in local and metropolitan area transports, in interaction with the Confederation, the municipalities and the transport companies (SBB and other transport companies). They also manage cantonal roads (upkeep, planning, etc.), registrations and traffic licenses.

The 2,115 municipalities (3,095 in 1960) are responsible for local transport. They manage the network of municipal roads and transport within each municipality. However, the cities are tending to expand beyond the perimeter of the municipalities. They are tending to merge to form larger municipalities or to establish associations around points of common interest, such as transports.

Including transport in the Detec led to a comprehensive approach to land use and development. Since its establishment in 2000, the Federal Office for Territorial Development (ARE) has been the competent authority for issues linked to territorial development, to mobility policies and to sustainable development. It works with the cantons and the municipalities and directs international cooperation in land use. Since the revision of the land use planning law in 2014, land use includes the definition and the organization of transport in Switzerland. Among other things, the Office makes sure that the activities of the Confederation comply with the principles of sustainable development.

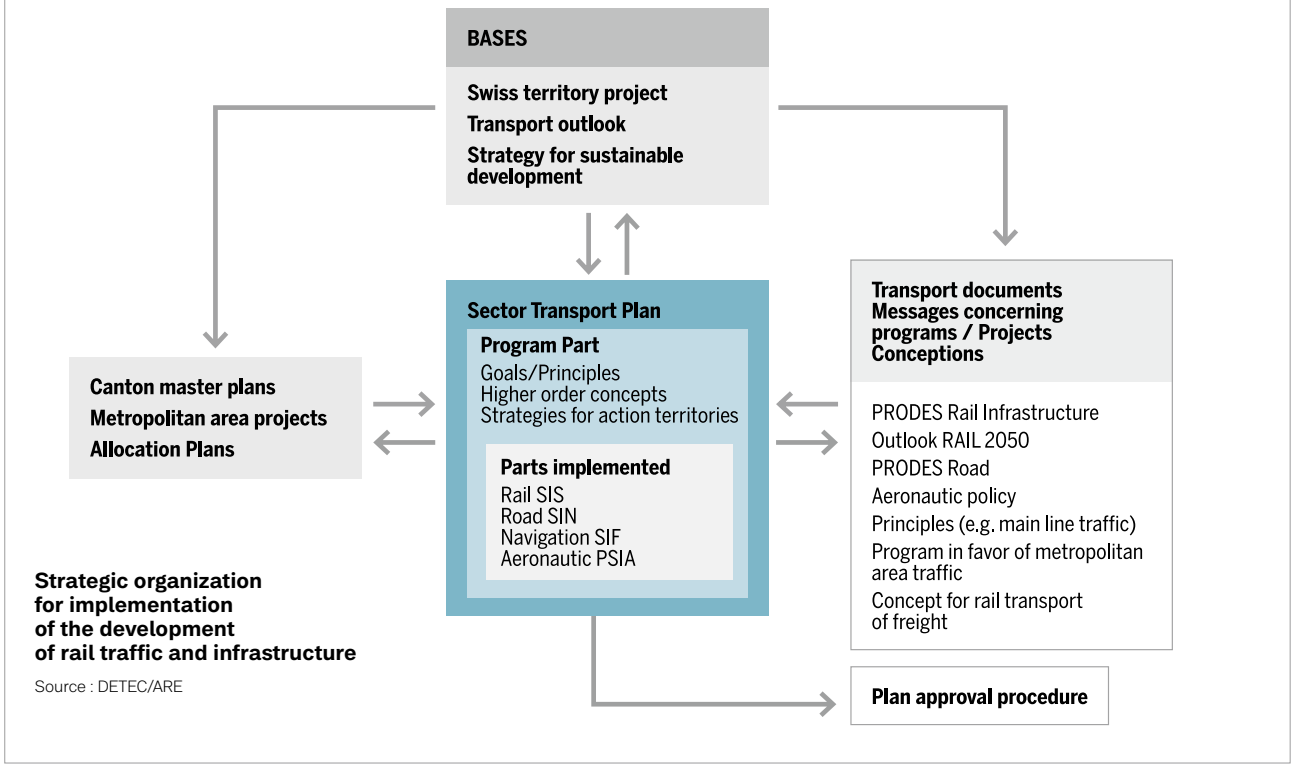
Land use development is a common task of the Confederation, the cantons and the municipalities. The ARE plays a supervision role but also carries out planning tasks. Its instruments are the Switzerland Territory Project, which defines an orientation framework jointly developed by all of the government levels. The sector plans are the main instrument that the Confederation has to harmonize its activities which have an impact on land use planning and to coordinate them with those of the cantons.

The Confederation documents its interests in concepts for subsequent decisions. Master plans are the central planning instrument of the cantons, which allow them to document all activities having an impact on land use planning for the desired territorial development. The decisive legislative acts are the law on land use planning and the law on second homes. Furthermore, the Geneva and Basel metropolitan areas are carrying out cross-border planning for their local transport, in collaboration with their French and German counterparts.

The following diagram connects the strategic planning on the federal level and the process of implementation associating the federal, canton, and metropolitan area levels.

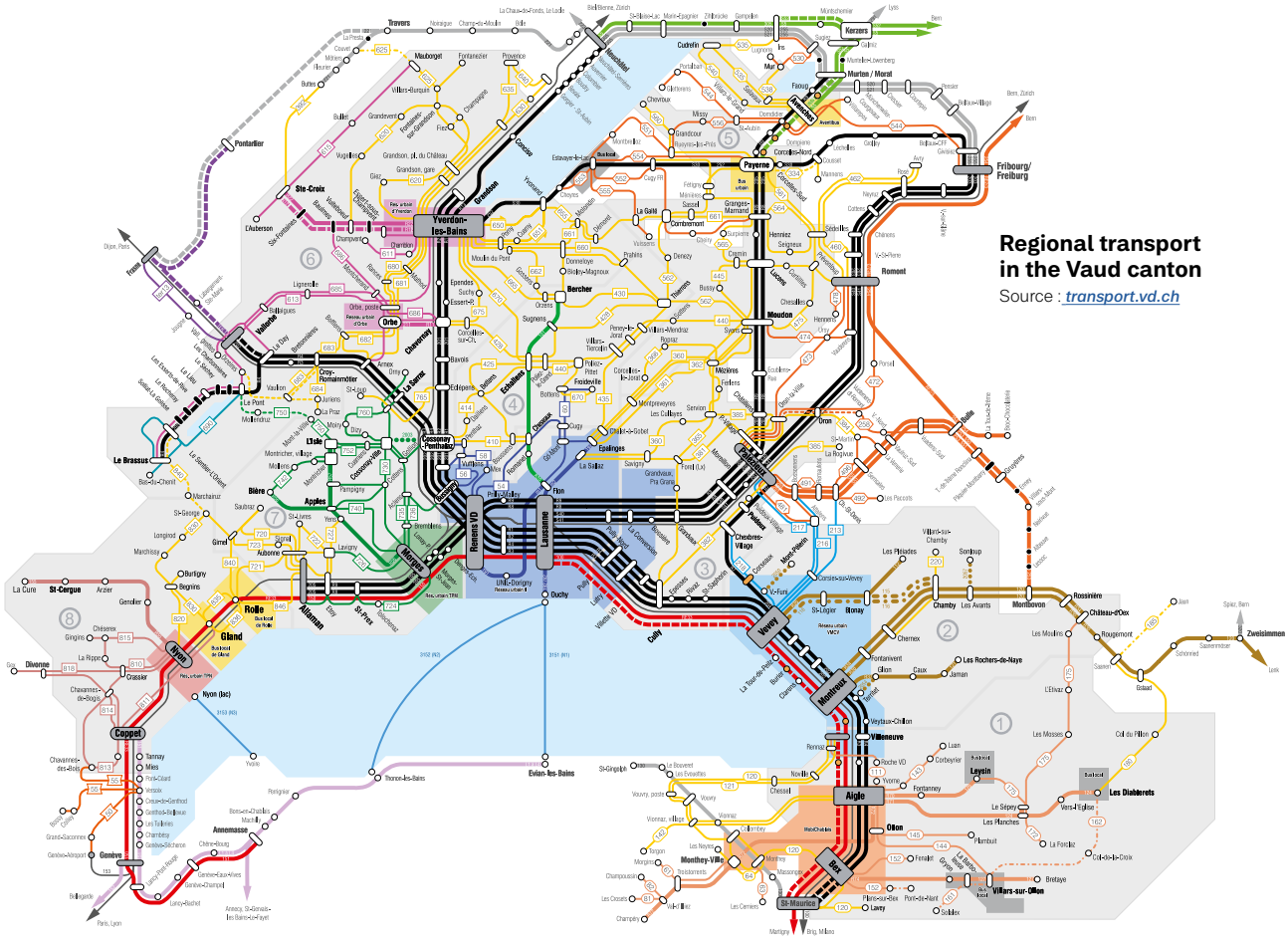
Switzerland has had **population growth**, which is expected to continue in the coming years (growth of 21% is expected between 2017 and 2050) although the inhabitable share of the territory is limited (the plateau). There is demand for greater mobility in the transport system. From 2000 to 2024, the population increased by 22%, air transport by 70% (in passenger-kilometers) and rail transport by 81%.

The example of the Vaud canton shows the abundance and the diversity of regional transport, with 28 local rail lines (managed by nine different companies) in addition to the main lines of the SBB, two metro lines, four funiculars and a bus and BRT network (around Lausanne), as well as tramways coming in the near future. The whole system is tightly linked with the neighboring cantons.



Strategic organization for implementation of the development of rail traffic and infrastructure

Source : DETEC/ARE



Regional transport in the Vaud canton

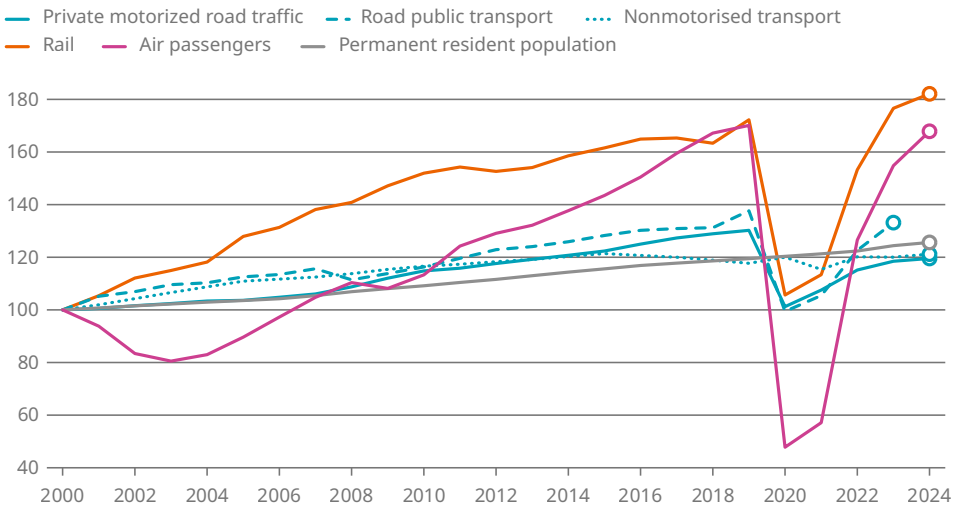
Source : transport.vd.ch

Evolution of passenger transport with respect to the population

Index 2000 = 100

Status of data:
October 9, 2025

Remarks: the graph does not contain the indications for navigation, cog railways, funiculars and cable cars. The transport indices are based on the person-kilometers traveled. The only exception: for aviation, the index is based on the number of local passengers and those in transfer for regular companies and charter traffic.



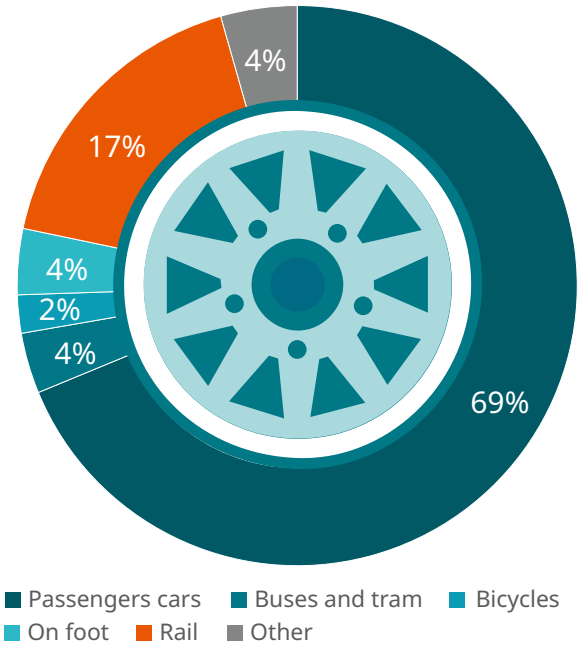
Source: OFS – Transport service for passengers (PV-L). Public Transport Statistics (TP). Statistics of the population and households (STATPOP). Statistics of the annual survey of the population (1981-2000) (ESPOT); OFS, OFAC – Air traffic, regular company or charter traffic.
Source : *bfs.admin.ch*

The modal breakdown shows greater use of rail, but with cars remaining the number one means of transport (in number of passenger-kilometers).

In 2025 there were 6.6 million vehicles on the road, including 4.8 million passenger cars. Among these, the share of electric vehicles increased from 4.2% in 2024 to 5.2% in 2025, and that of hybrid vehicles from 9.6% to 11.9%. In terms of trends, the use of rail and bicycles is increasing, while the use of cars is stagnating.

In 2021, the Swiss population (over the age of six) spent 80 minutes per day on average in transport. Leisure accounted for the largest share of the journeys (42%), ahead of work (16%), shopping (13%) and education (5%).

The growth in mobility (particularly rail) is strongly linked to commuting, often between cantons, for which the distances and travel times are increasing (particularly around Zurich). ■



Means of ground transport, % passenger-kilometers, 2023

Source: OFS, *Mobilité et transports, statistique de poche 2025*