TALLINN REGION SUSTAINABLE URBAN MOBILITY STRATEGY 2035

AUGUST 2019
PUBLIC DRAFT STRATEGY

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MAANTEEAMET

Tallinn




FINEST SMART MOBILITY

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Dear citizen,

Estonia, especially Tallinn and Harju County, has developed rapidly and enormously over the last 15 years. After Estonia's accession to the European Union, our economy continued to grow steadily, and both Tallinn and its surroundings grew quickly to become the engine of development of northern Estonia. The city is home to nearly half of the population and traffic of Estonia, as well as major attractions and centres of science, industry, and entertainment. Tallinn receives and serves as a passageway for trade flows arriving from all corners of the globe by land, water, and air.

This rapid development has led to people spending more of their time and money on transportation, which has in turn increased transport-related environmental impacts. Every day we travel more kilometres per person and build ever more expensive infrastructure, which is increasingly costly to maintain. The number of vehicles on our roads is increasing together with fine particulates and other emissions, as is the amount of mineral resources we are using for road infrastructure. In a growing and developing densely populated city, daily travel by car is more expensive and inefficient than anywhere else, because land that is essential to the city and its people is mainly used for constructing new parking lots and expanding roads.

Tallinn, like the Nordic cities, has come to realise that better urban planning and replacing cars with other, more economical, means of transport is cheaper for society in the long run and helps reduce people's mobility costs.

Moreover, increasing car traffic is expensive for municipalities and the state and is a burden on the environment. Each additional car requires the construction of 2 to 3 new parking spaces and maintaining car traffic brings with it the need to renovate and maintain thousands of kilometres' worth of roads each year, as well as to monitor and regulate the traffic, maintain traffic light systems, etc.

Across the Gulf of Finland, Tallinn's sister city, Helsinki, and its neighbouring municipalities have set a target of eliminating the need for daily travel by car for 70% of their population. As yet, the Tallinn region has lacked such ambitions.

If the Tallinn region were to develop a transport system and carry out urban planning aimed at ensuring 25,000–50,000 people travel daily by foot, public transport, or bicycle by eliminating their need for daily use of a personal car, it would directly save our citizens and businesses 200–700 million euros yearly in money alone.

Tallinn's vision is for its mobility services and urban space to make utilising sustainable means of transport the most convenient option for as many people as possible. This is a lifestyle that is clean, healthy, and economically viable.

The Tallinn region Sustainable Urban Mobility Strategy 2035 identifies 13 challenges which affect urban transport and people's mobility the most. To solve these problems, we look at what we can do within the next 15 years to make Tallinn a comfortable place to live in and all of its areas conveniently accessible to everyone.

This will be achieved through better urban planning: the development of a network of streets and roads that are people-friendly to all types of travellers. We will build essential facilities (schools and kindergartens) near homes or areas that are easily accessible by public transport. We will create additional convenient transfer points. We will create better alternatives for carless travel, as well as safe cycle and pedestrian tracks for short-distance travel.

Mihhail Kõlvart
Mayor of Tallinn
Taavi Aas
Minister of Economic Affairs and Communications

This public draft strategy has been prepared within the framework of the FinEstSmartMobility collaborative project of the Estonian Road Administration, the Tallinn Transport Department, Helsinki City Board, and the Helsinki Regional Transport Authority and co-funded from the Interreg Central Baltic Programme (2016–2019).

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The studies, seminars, and presentations used for preparing the Strategy can be found here:

https://www.mnt.ee/et/tee/tallinna-piirkonna-saastva-linnaliikuvuse-arengukava-tallinna-lilia-2035-eesmargid
https://www.tallinn.ee/est/liikuvuskava2035/

Thank you to everyone who participated in the Tallinn region Urban Mobility Strategy 2035 workshops and seminars (2017–2019)! The participants included the following organisations, institutions, and companies.

Anija Rural Municipality
Union of Estonian Automobile Enterprises
Baltic Environmental Forum
Bolt
City of Helsinki
Citycon
Citypark Eesti
Colliers International
Doranova Baltic OÜ
Estonian branch of Eckerö Line
Estonian Traders' Association
Estonian Environmental Research Centre
Estonian Association of Persons with Reduced Mobility
Eesti Liinirongid AS
Estonian Green Movement
Estonian Supply Chain Association
Estonian Academy of Arts
Conservative People's Party of Estonia
Ekspertruum OÜ
Elmo Rent OÜ
Endover KVB OÜ
ETKL
EuroPark Estonia OÜ
Go Bus
Fleet Complete Eesti
Union of Harju County Municipalities
Harku Rural Municipality Government
Helsinki Region Transport (HSL)
Hendrikson & KO
Inphysica OÜ
Jõelähtme Rural Municipality Government
K-Projekt AS
Kantar EMOR AS
Kaubamaja AS
Keila Rural Municipality Government
Keskkonnapsühholoogia uuringud OÜ
Tallinn Centre District Administration
Kiili Rural Municipality Government
Kohila Rural Municipality Government
Kolmruut Arhitektid
Kose Rural Municipality Government
Kristiine District Administration
Lääne-Harju Rural Municipality Government
Linnalabor
Linnalahendused OÜ
Luminor Bank
Estonian Road Administration
Maardu City Government
Mainor Ülemiste AS
Ministry of Economic Affairs and Communications
MARH Stuudiod OÜ
META Advisory
MTÜ Põhja-Eesti Ühistranspordikeskus (Northern Estonian Public Transport Centre)
Mustamäe District Administration
Nõmme District Administration
Oma Maja
Estonian Homeowners' Confederation
OÜ ASE
OÜ Hendrikson & Ko
Pirita District Administration
Police and Border Guard Board
Positium
Northern Tallinn District Administration
Postimees
Raasiku Rural Municipality Government
Rae Rural Municipality
Rapla Rural Municipality
Ministry of Finance
RealWAY / Go Group
Estonian Reform Party
Ridango AS
Riigi Kinnisvara AS
Riigikogu (parliament of Estonia)
Ruum ja Maastik OÜ
Saku Rural Municipality Government
Saue Rural Municipality
SPINUNIT OÜ
Statistics Estonia
Tallink Grupp AS
Energy Agency of Tallinn
Tallinn City Enterprise Department
Tallinna Kaubamaja Kinnisvara AS
Tallinn Environmental Department
Tallinn Municipal Engineering Services Department
Tallinna Lennujaam AS
Tallinn City Office
Tallinn Urban Planning Department
Tallinna Linnatranspordi AS
Tallinn City Council
Tallinna Sadam AS
Tallinn University of Applied Sciences
Tallinna Tööstuspargid
Tallinn Transport Department
Tallinn University
TalTech
University of Tartu
Tehnopol
Telliskivi Creative City
Transport for London
University College London
Ülemiste City
URBAN MANAGEMENT OÜ
Viimsi Rural Municipality Government
Viimsi Rural Municipality Council
Viking Line Eesti OÜ
Viru Keskus
Wolt Eesti OÜ

SUMMARY

The vision of the mobility strategy for the Tallinn region: The Tallinn region is an attractive, vibrant, and green region with a lively economy, and is home to healthy and happy people. The Tallinn region is covered with an excellent network of public transport and innovative mobility services as well as convenient cycle tracks and sidewalks, which are accessible and usable all year round to everyone from 8-year-olds to 80-year-olds.

One of the key prerequisites for achieving this is a well-planned transport system and urban space created through the close co-operation of the city, the state, and regional authorities, which provide good mobility opportunities to all residents. The goal of the Tallinn region Sustainable Urban Mobility Strategy 2035 (hereinafter 'Tallinn Mobility Plan 2035') is to analyse the causes of mobility-related problems and to provide solutions which enable good and fast mobility as well as ensure the achievement of environmental objectives. The Strategy covers the Tallinn region: the city of Tallinn and its neighbouring municipalities, which form a region that is home to Estonia's highest transport load and heaviest commuter traffic.

The rapid increase of car usage and economic development in the region have now brought 50% of the country's total transport and its environmental impact to this region. The number of cars and the volume of traffic have increased rapidly throughout the region, leading to a decline in travel by foot and public transport, population and job relocations, increased dependence on personal cars, and increased transport costs for households and businesses. At present, Tallinn's traffic generates 1,400,000 tonnes of CO_2 emissions per year, but a target has been set to reduce the emissions to 930,000 tonnes by 2030. Achieving an attractive city, diversity of mobility, and the set environmental and health objectives requires guiding urban development, creating good opportunities for using fast public transport and travelling by foot instead of driving personal cars, as well as a much more economical fleet of vehicles. A transport system that is more diverse and aimed at the wider use of public transport is also more cost-effective, enabling people to save at least 300 million euros a year.

The Mobility Plan workshops and seminars highlighted 13 major problems and challenges related to urban planning and mobility that need addressing:

1. Travel times and costs are increasing.
2. Cars are taking up more and more valuable urban space.
3. Dependence on personal cars and the resulting inequalities are growing. Travel by public transport and foot is decreasing.
4. Transport-related energy consumption and greenhouse gas emissions are increasing.
5. Road maintenance and public transport costs are increasing and the existing road network has a considerable backlog of repairs.
6. The independent mobility of schoolchildren is decreasing.
7. The negative health effects of transport (noise, pollution, low physical activity, stress) are increasing.
8. New densely packed developments are cropping up in areas with poor public transport links.
9. The public transport ticketing systems of Tallinn and Harju County are not conducive to combining multiple means of travel. Public transport services are fragmented and mutually incompatible, and there are few convenient transfer points.
10. The city streets are not attractive for walking and cycling. The elderly and pedestrians are still highly vulnerable in urban traffic and road safety is poor.
11. Data on the use of and need for different means of travel are patchy.
12. The potential of innovative mobility services remains untapped.
13. Current situation and bottlenecks in freight transport logistics.

To analyse potential and desired future trends, three development scenarios were drawn up, which were then assessed with regard to the problems that need to be addressed and the vision and objectives of the Mobility Plan.

Future trends in mobility up to the year 2035 were analysed for three possible future scenarios.

1. CONTINUING ON THE SAME COURSE – continuation of current trends

We will continue on the current course. There is no active intervention from the municipalities or the state, who instead attempt to address the demand for higher capacity infrastructure resulting from increased car usage. In this scenario, the number of passenger cars in the Tallinn region will increase by up to 100,000, while the share of public transport will decrease, and each year at least 25 million euros will have to be spent on CO_2 emission allowances.

2. Tallinn Public Transport+

Investments in public transport by Tallinn and neighbouring municipalities make it possible to primarily meet people's increasing mobility needs through public transport. The speed of urban public transport links is improved and the municipalities increase the capacity and funding of exurban public transport services. There is closer co-operation in improving the way mobility and public transport are organised. Although the number of cars will increase, people will be spending less on daily travel by car, saving them about 280 million euros annually. This is roughly equal to the volume of the public sector investments. Spending on CO_2 emission allowances will be three times lower, i.e. around 8 million euros.

3. Tallinn is following in Helsinki's footsteps

Tallinn, in co-operation with the state and neighbouring municipalities, works towards improved urban mobility and settlement guidance as a whole, following Helsinki's development model, which makes the entire region's public transport system and cycle and pedestrian track network so attractive that public transport and walking become the preferred means of travel. The share of travel by public transport, foot, and bicycle increases. Spending on car usage decreases.

To implement the vision and objectives of the Mobility Plan, strategic actions have been divided into four lines of action.

A complete and well-planned urban space is based on a multi-hub development model, towards which Tallinn has been moving over the last few decades. The new inner city hubs will be the areas of Sadama and Reidi tee, Kalamaja and Noblessner, Kristiine and Hipodroomi, Järve and Tammsaare tee, and Ülemiste and the airport. These hubs will be designed as densely populated and rapidly developing areas with good inter-hub public transport links, where the requirements for constructing parking spaces are reduced and short-term parking is favoured. To this end, the city will, if necessary, acquire strategically important plots and prepare a detailed plan for them. Highly trafficked buildings, including institutions, will be located in the hubs and made accessible by various means of transport.

Good alternatives to cars The public transport route network will be improved to ensure that inter-hub travel by public transport takes less than 20 minutes. In order to improve the efficiency of trams as the most valuable and highest capacity type of public transport, their average speed will be increased to 18 km/h. In addition to car and public transport, short-term bicycle and car rental solutions will be developed to improve road safety and provide more options for daily travel.

Actions in the areas of the regional transport network and mobility management are aimed at facilitating inter-municipality travel and the possibilities for combining different means of transport. Establishing a common route network and managing public transport jointly will allow existing resources to be used in a more efficient manner and reduce the number of cars travelling to Tallinn daily from neighbouring municipalities. Public transport links to new developments, such as Viimsi, Peetri, and Tabasalu, will be improved. Park & Ride car parks are already being set up near public transport stops outside the city limits. Freight traffic will continue to be diverted away from the city centre.

To ensure sustainable funding, a common ticketing system and a common model and arrangement of public transport funding (subsidisation and ticket revenue) will be established. A building right fee will be introduced for highly trafficked buildings to offset the burden on municipalities of providing quality infrastructure. To cope with higher traffic loads and to finance the necessary investments, a dynamic rush hour fee will be introduced. A new parking policy and parking fee system will introduce a parking space management fee in more densely populated and highly utilised areas.

This public draft strategy has been prepared within the framework of the FinEstSmartMobility collaborative project of the Estonian Road Administration, the Tallinn Transport Department, Helsinki City Board, and the Helsinki Regional Transport Authority and co-funded from the Interreg Central Baltic Programme (2016–2019). The preparation of the Mobility Plan will continue with the collection of feedback on the draft strategy, the selection of objectives and priority actions, and the conclusion of a memorandum of co-operation between the City of Tallinn, the state, and Harju County municipalities.

VISION: A PEOPLE-CENTERED CITY

A well-designed urban space and streamlined mobility are important prerequisites for Tallinn to be an attractive, vibrant, and green city with a lively economy, and home to healthy and happy people. The Tallinn region is covered with an excellent network of public transport and innovative mobility services as well as convenient cycle tracks and sidewalks, which are accessible and usable all year round to everyone from 8-year-olds to 80-year-olds.

Tallinn's vision is to be a people's city

A human-friendly, clean, and considerate Tallinn does not mean disrupting people's lifestyles and putting the brakes on the economy. The economy can grow and become more competitive at the pace of the successful capitals of the Baltic Sea, if living and working places are connected in a well-considered and space-efficient manner, and people can move around in healthy ways.

Enjoyable common mobility

A good user experience will lead to public transport becoming the main means of daily travel in Tallinn. It is affordable, convenient, reliable, and environment-friendly, and it allows residents to travel between Tallinn's major residential, working, and school districts in a reasonable amount of time. Most homes, workplaces, city squares, and parks have excellent public transport access, i.e. public transport stops are located within 400 metres.

A city of active mobility

The healthiest and cleanest means of travel which also use the least space and energy in Tallinn are walking and cycling. Our urban space favours active mobility – especially walking and cycling – as schools, shops, and leisure facilities are no more than a short walk away. Mobility infrastructure – city streets, public transport, cycle tracks, fitness trails, squares, and parks – is designed to provide a pleasurable travel experience.

Safe

Pleasant urban space design and good traffic management reduce speeding and inconsiderate behaviour towards others and make cyclists and pedestrians feel more comfortable. Streets and sidewalks that are in good repair and maintained throughout the year increase safety. Streets with less traffic and lower traffic speeds are operated as a shared space and designed appropriately, while on larger streets all means of travel are clearly separated, so that even pedestrians and cyclists can travel separately from one another and safely.

Accessible to everyone

Accessible means that the infrastructure, especially the streets and public transport, can be used by anyone – including wheelchair users and people travelling with guide dogs and prams. Sidewalks and pedestrian crossings are unobstructed and buildings can be accessed via ramps; sidewalks and pedestrian crossings are fitted with tactile pavings to assist visually impaired pedestrians. All new streets in Tallinn meet the accessibility requirements and old streets are freed of major obstacles. All public transport stops are pram and wheelchair accessible.

Common solutions across municipalities

Tallinn and the settlements of its nearest municipalities form an integral whole, where it is convenient to combine different means of travel and public transport services, which are well organised and widely available.

Objectives of the Tallinn Mobility Plan for 2035

Based on the vision above, the main objectives for achieving more sustainable mobility in Tallinn were defined as follows.

1. By 2025, at least 50% of the residents of the Tallinn region will be making their daily journeys by public transport, foot, or bicycle, and by 2035 it will be 70%.

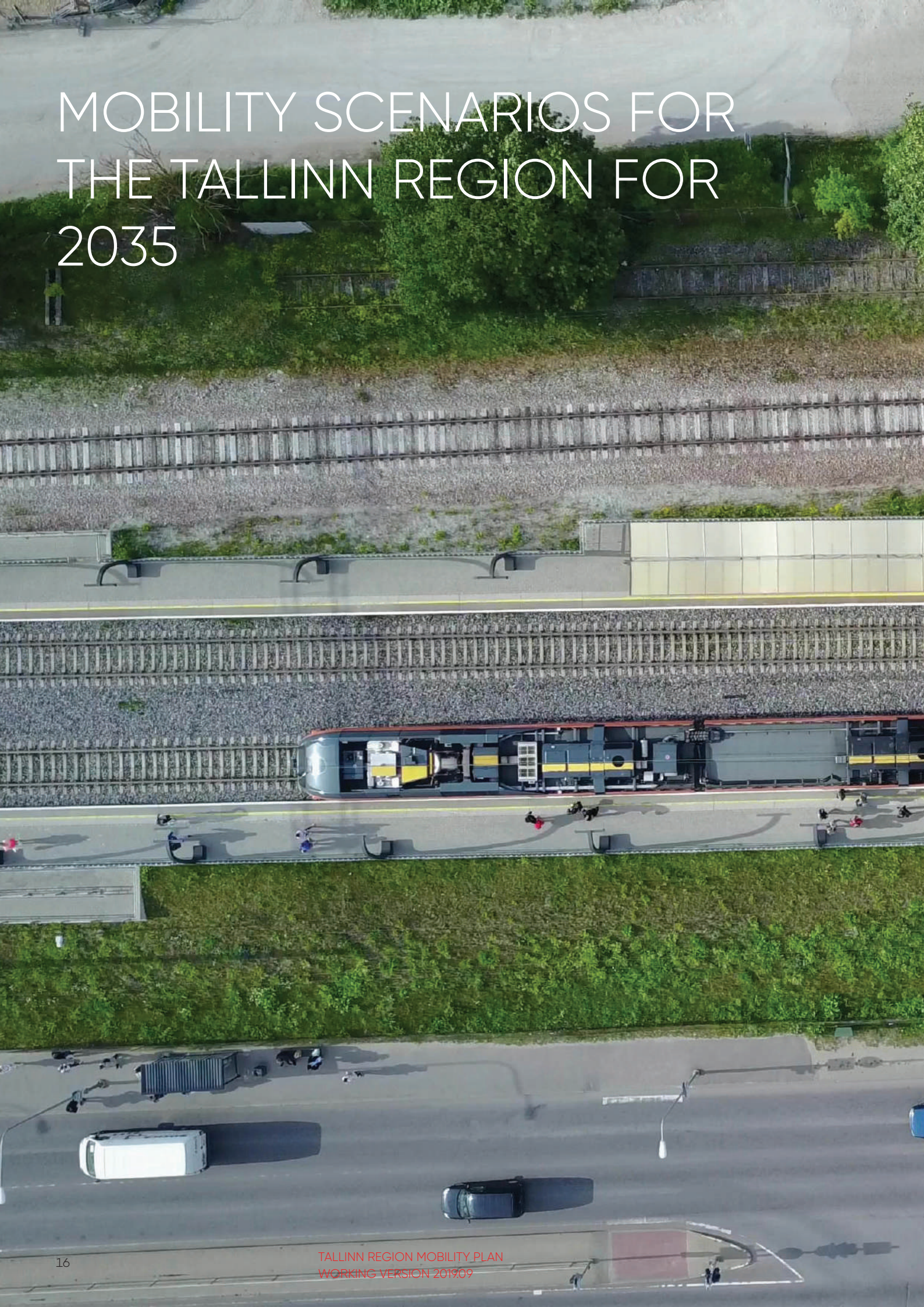
2. In accordance with the Covenant of Mayors, transport-related greenhouse gas emissions in Tallinn will be reduced by at least 40% compared to 2007, i.e. to 550,000 tonnes of CO_2 emissions per year by 2025 and 390,000 tonnes by 2030.

3. There are no fatal traffic accidents in Tallinn.

4. Tallinn as a multi-hub city has excellent public transport links, where it takes a maximum of 20 minutes to move between hubs. A common regional ticketing system and route network has been established in co-operation with neighbouring municipalities and the state.

5. Sidewalks, public transport stops, and the core cycle track network are accessible to everyone (including the elderly and disabled) throughout the year, and 90% of schoolchildren can make their own daily journeys independently.

MOBILITY SCENARIOS FOR THE TALLINN REGION FOR 2035



MOBILITY SCENARIOS FOR THE TALLINN REGION FOR 2035

During the preparation of the Tallinn Mobility Plan, three future scenarios were drawn up with the aim of assessing the impact of possible actions on mobility. The scenarios were drawn up on the basis of commuting to work being the primary driver of demand for mobility during peak hours. First, a baseline scenario, i.e. 'Continuing on the same course', was drawn up, based on the continuation of current trends. Alternative scenarios were drawn up using the so-called *back-casting* method: that is, key indicators for mobility and transport policy for 2035 were established according to the strategic objectives of the Mobility Plan, the desirable possible future, and the selected lines of action. Possible future scenarios

SCENARIO 1. CONTINUING ON THE SAME COURSE

1.1. Transport and car traffic will continue to grow at the same rate. The number of cars per 1,000 people in the Tallinn region will increase from today's 450 cars to 550 cars. As a result, the number of vehicles in the region will increase by up to 100,000 by 2035, necessitating the construction of additional parking spaces.

1.2. The focus will be on creating the most suitable infrastructure for the growing number of cars; the growing investment needs can be met by taking out loans.

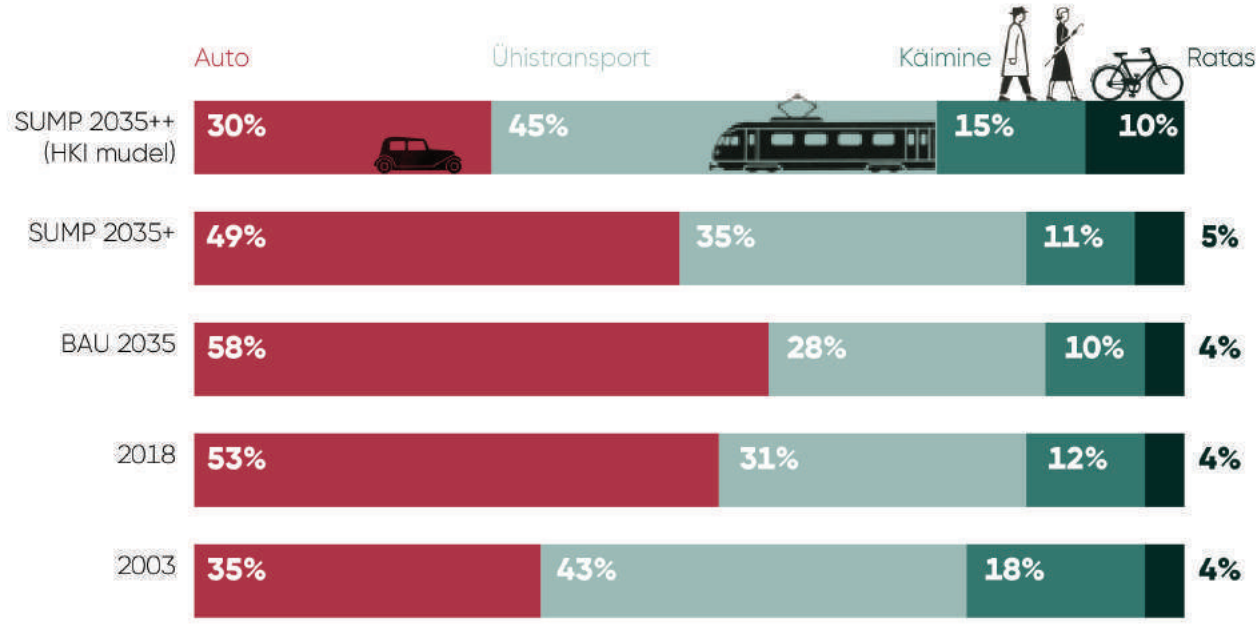


Figure 1.1. Main means of commuting to work of residents of Tallinn and Harju County in 2003 and 2018 and in different scenarios in 2035.

1.3. Increasing congestion will increase the time it takes to travel by car and reduce the competitiveness of public transport.

1.4. The need for repairing existing infrastructure will increase and the level of maintenance of sidewalks during the winter will decrease.

1.5. Transport-related taxes will not encourage drivers to opt for cleaner and more economical cars.

1.6. Independent mobility of children and the elderly will decrease, public transport will be used mainly by students, pensioners, and the unemployed.

1.7. The number of serious road accidents will increase due to a large number of people aged 65 and over, more of whom will be driving compared to the previous generation; the street environment will fail to meet the needs of those opting for increasingly popular short-distance mobility equipment (e.g., scooters, rental bicycles) and of the elderly using mobility aids.

1.8. Although the share of electric vehicles will increase, the increase in total transport demand will mean that emissions will not fall.

1.9. Traffic noise and sedentary lifestyles will become an increasing problem, and the increasingly ambitious goals of improving ambient air quality and reducing greenhouse gas emissions will not be met. Transport in the Tallinn region may require the purchasing of additional CO_2 emission allowances worth, depending on the price of the allowance, 15–25 million euros per year.

1.9. New developments will continue to be built in areas with poor or non-existent public transport links, which will further increase the need for owning a personal car.

1.10. Mobility-related expenditure will grow from 1.5 billion to 2 billion euros per year at current prices.

SCENARIO 2. TALLINN PUBLIC TRANSPORT+

2.1. The focus will be on creating the most suitable infrastructure for the growing number of cars, while investing in increasing the share of public transport.

2.2. Increasing congestion will increase the time it takes to travel by car, but the increased investment in public transport will improve the average speed of public transport links.

2.4. Transport-related taxes will not encourage drivers to choose cleaner and more economical cars.

2.5 Despite population growth, active public transport development will keep peak traffic at its current level, with most of the added cars being used on weekends or off-peak hours. The number of cars per 1,000 residents will increase to 500, but in the longer term (by 2035) will begin to decrease.

2.6. The number of journeys made by public transport will increase by 25%. Thanks to the improved public transport speeds, downtown travel and the number of people travelling from Harju County to Tallinn's hubs by public transport will increase rapidly.

2.7. Infrastructure investments will mainly be aimed at ensuring good mobility and fast public transport links in new urban hubs.

2.8. The state will support the improvement of the competitiveness of public transport in order to achieve environmental objectives by co-financing infrastructure projects and the acquisition of rolling stock for public transport with 150 million euros until 2030.

2.9. Compared to the baseline scenario, society's mobility costs can be reduced by 15%, i.e. 300 million euros per year, however total transport-related expenditure in the capital and its neighbouring municipalities will still increase.

2.10. CO_2 emissions can be reduced, but it is estimated that an additional 16 million euros per year will be needed for additional allowances.

2.11. New developments will continue to be built in areas with poor or non-existent public transport links, which will further increase the need for owning a personal car.

SCENARIO 3. TALLINN IS FOLLOWING IN HELSINKI'S FOOTSTEPS

3.1. Transport, including car traffic, will continue to grow at an increasingly slower pace until 2025. Thereafter, the share of public transport and cycling will increase and vehicle mileage will decrease by 10%; by 2035 there will be around 360 cars per 1,000 people.

3.2. Mobility development and investments will be focused on meeting the increasing demand for travel by public transport, foot, and bicycle, as well as on creating the most appropriate infrastructure for this. Instead of excise duties on fuel, transport-related charges will be differentiated: rush hour, CO_2, and parking fees will cover the costs of maintaining existing high-quality infrastructure, and the need for infrastructure repairs will decrease. Working people will be willing to pay for quality regional public transport, and nearly 50% of public transport costs will be covered by ticket revenue.

3.3. Car travel times will not increase; the rush hour fee will eliminate uncertainties about rush hour travel times; the competitiveness of public transport compared to cars will increase both in the city centre as well as major urban hubs

.

3.4. Sidewalks and cycle tracks will be safe, attractive, and well-maintained throughout the year, which will increase the share of travel by foot and bicycle and enable students, the elderly, and people with special needs to travel independently. This will have a positive effect on both public health and the cleanliness of the urban environment.

3.5. Transport-related taxes as a whole will not increase, but will encourage drivers to prefer cleaner and more economical cars.

3.6. On the one hand, public transport will be affordable for low-income earners and, on the other, it will also be attractive to high-income earners. Businesses and institutions will prefer locations with good public transport access.

3.7. No citizens will die in traffic accidents in Tallinn, and the number of serious accidents and amount of traffic-related damage will decrease.

3.8. The active development of public transport and the construction of most new developments near public transport links will create a situation whereby 70% of the residents of the Tallinn region will be making their daily journeys by public transport, bicycle, or foot, while those residing in sparsely populated areas will find it convenient to combine travel by car and bicycle with mobility services and public transport.

3.9. Emissions of CO_2 and other pollutants from transport in the Tallinn region will decrease thanks to both increased adoption of cleaner and more economical vehicles and the increased share of light traffic. Tallinn will become a seller of CO_2 allowances.

3.10. Traffic-related noise will decrease thanks to an increased share of electric vehicles, improved road conditions, calmer traffic, and lower car usage. People will be more physically active in their daily life and the mobility environment will support travel by foot and bicycle, reducing sedentary lifestyles.

3.11. New office and residential buildings will be built near excellent public transport links, housing will be affordable for young families, and the need for owning multiple cars and purchasing parking spaces will fall.

3.12. Mobility-related expenditure, including car usage, will decrease from 1.78 billion to 1,68 billion euros per year at current prices.

3.13. 90% of children will be travelling to school and hobby classes independently. This will save parents time and give children more freedom.

3.14. The costs of investing in and maintaining streets and roads are about 35% lower than in the baseline scenario, with the focus in road maintenance being on reducing the need for repairs, improving the quality of public spaces, developing road safety, cycle and pedestrian tracks, and improving the level of wintertime maintenance.

3.15. A joint financing mechanism will be set up for organising transport in the region; all public transport services will be planned and procured jointly.

A more detailed description of the future scenarios and a cost-benefit comparison are provided in Annex 1.

TALLINN MOBILITY PLAN LINES OF ACTION FOR 2035

TALLINN MOBILITY PLAN LINES OF ACTION FOR 2035

To achieve the objectives of the Mobility Plan and to realise the desired scenarios, four lines of action were set out: a complete and well-planned urban space, good alternatives to cars, a transport network encompassing the Tallinn region, and sustainable financing.

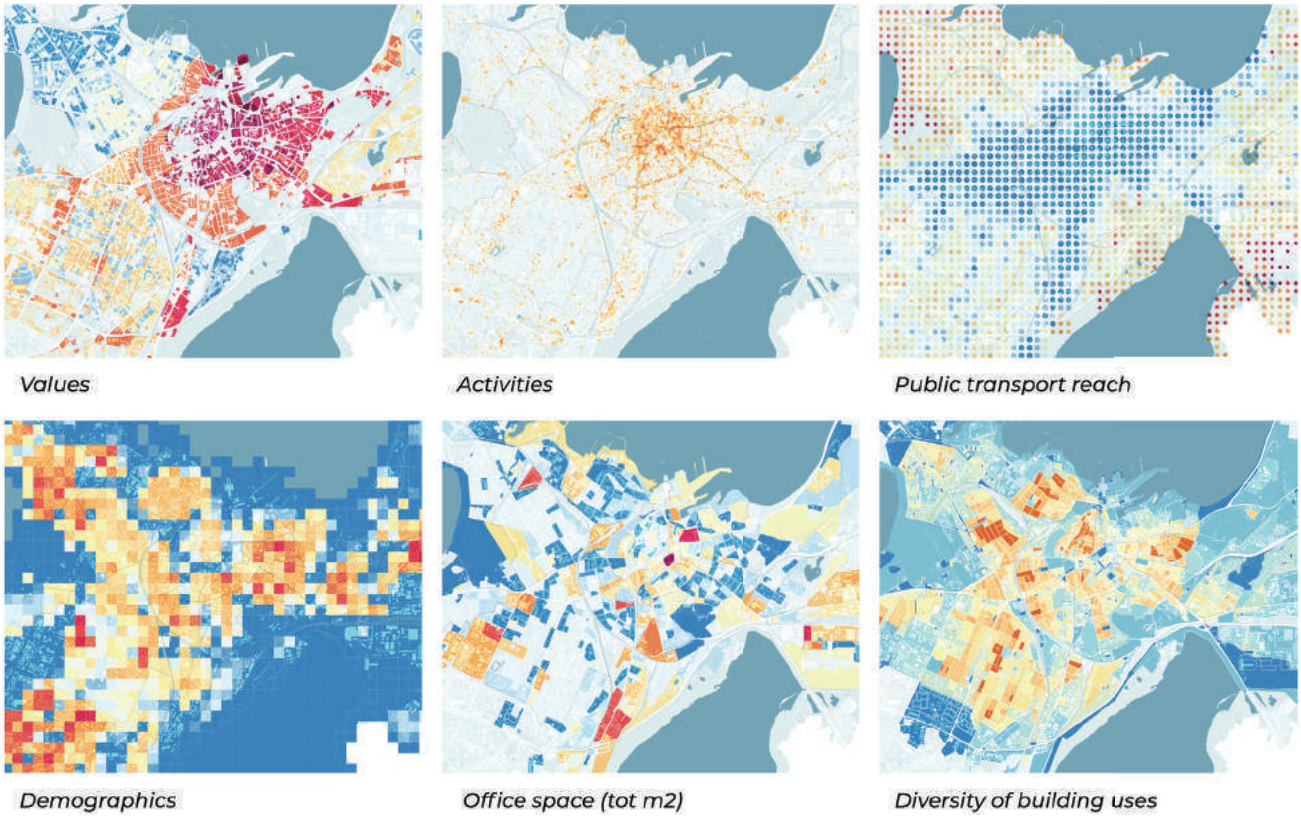


Figure 2.1. Tallinn will be transformed from a city with a single central area to a multi-hub city, where people travel more between the various hubs and less between the city centre and 'dormitory suburbs'.

LINE OF ACTION 1: A COMPLETE AND WELL-PLANNED URBAN SPACE

1.1. Based on the multi-hub nature of Tallinn:

1.1.1. the hubs of Tallinn and its neighbouring municipalities will be made easily and quickly reachable by public transport and provided with convenient transfer options;

1.1.2. plans will be established (acquiring land where necessary), dense population will be promoted, and requirements regarding the number of parking spaces to be built will be eased.

In addition to the city centre and the area around Viru Keskus, similar principles should be followed to establish fast transport links in the areas indicated on the map (Sadama and Reidi tee, Kalamaja and Noblessner, Kristiine and Hipodroomi, Järve and Tammsaare tee, Ülemiste and the airport) and promote sustainable inter-hub mobility (see Figure 2.2).

1.2. A comprehensive street and road plan which accounts for different means of travel will be developed, and standards on pedestrian, bicycle, and public transport flow capacity, road maintenance, etc. will be introduced for different types of streets.

1.3. New developments which are expected to receive extensive traffic will be planned, primarily near already well-functioning public transport services:

1.3.1. at all levels of planning (general, thematic, county, detailed planning, etc.), it will be a guiding principle to prefer and develop areas with excellent public transport services and implement economical transport solutions;

1.3.2. where necessary, the public sector will procure additional land in strategically important locations and will prepare a detailed plan for its development;

1.3.3. the preparation of a mobility solution (including public transport and travel by car, bicycle, and foot) will be made a prerequisite for granting building rights to developments and heavily trafficked sites. Institutions, schools, and other locations with more than 1,000 people will be required to implement a mobility plan;

Figure 2.2. In addition to the city centre and the area around Viru Keskus, similar principles should be followed to establish fast transport links in the areas indicated on the map (Sadama and Reidi tee, Kalamaja and Noblessner, Kristiine and Hipodroomi, Järve and Tammsaare tee, Ülemiste and the airport) and promote sustainable inter-hub and home-to-hub mobility.

1.3.4. in areas with good public transport links, requirements regarding the construction of parking spaces will be reduced, giving preference to short-term parking facilities and the 'user pays' principle (see chapter 4 for more details).

LINE OF ACTION 2: GOOD ALTERNATIVES TO CARS

2.1. Developing high-speed public transport links between urban hubs. Average public transport journey time when travelling between hubs should not exceed 20 minutes:

2.1.1. construction of a new tramline serving the Old City Harbour development area of Tallinn;

2.1.2. establishment of high-speed direct links between the larger settlements and hubs of Harju County and the districts of Tallinn;

2.1.3. connection of new densely populated areas to the public transport network (e.g., TalTech–Mustamäe).

2.2. Increasing the average speed of trams (from the current 11.3 km/h to 18 km/h by 2030) in order to improve the efficiency and competitiveness of public transport:

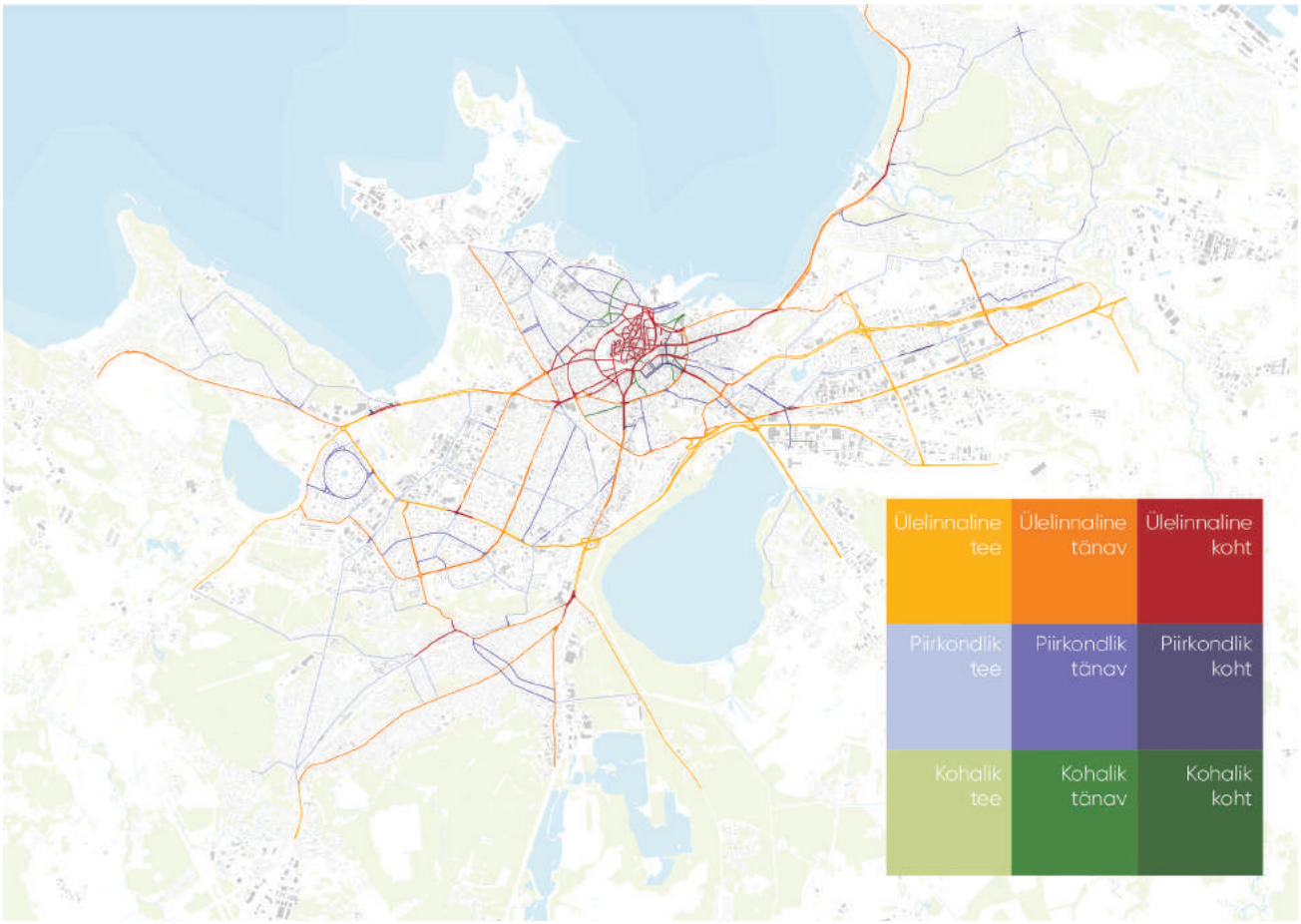


Figure 2.3. The higher the priority of the space, the more important it is to ensure fast public transport on the street, the quality of the sidewalks, and the construction of separate cycling infrastructure.

2.2.1. increasing the speed of public transport links passing through the Hobujaama tram stop and the Viru intersection;

2.2.2. giving green light priority to public transport at major intersections and in public transport corridors in the city centre;

2.3. designing transfer options, including planning for transfers between different means of travel (train, city and county transport, Park & Ride). Here, the priority is to enable transfers in hubs, i.e. Kristiine, Järve, Ülemiste, Kalamaja and Noblessner, Haabersti):

2.3.1. constructing terminals at Ülemiste and Kristiine in order to connect train and bus routes;

2.3.2. creating of transfer points at the intersection of Tammsaare tee and Sõpruse pst, in Mustakivi, and in Laagri.

2.4. Making additional investments to develop a road network that is safe and modern and accounts for all means of travel. Here, the priority is to improve the quality and safety of the existing road network in order to promote walking and cycling:

2.4.1. to join cycle tracks into an integrated network, a core cycle track network will be developed in accordance with the Tallinn Bicycle Strategy;

2.4.2. calming traffic and redistributing street space on the basis of the street type classification (residential areas, hubs, main street, Liivalaia, Endla street) discussed under Line of Action 1;

2.4.3. creating pick-up and drop-off points for users of ridesharing and taxi services in hubs. Restoring short-term parking spaces on the city streets.

2.4.4. Expanding the car sharing system and bicycle

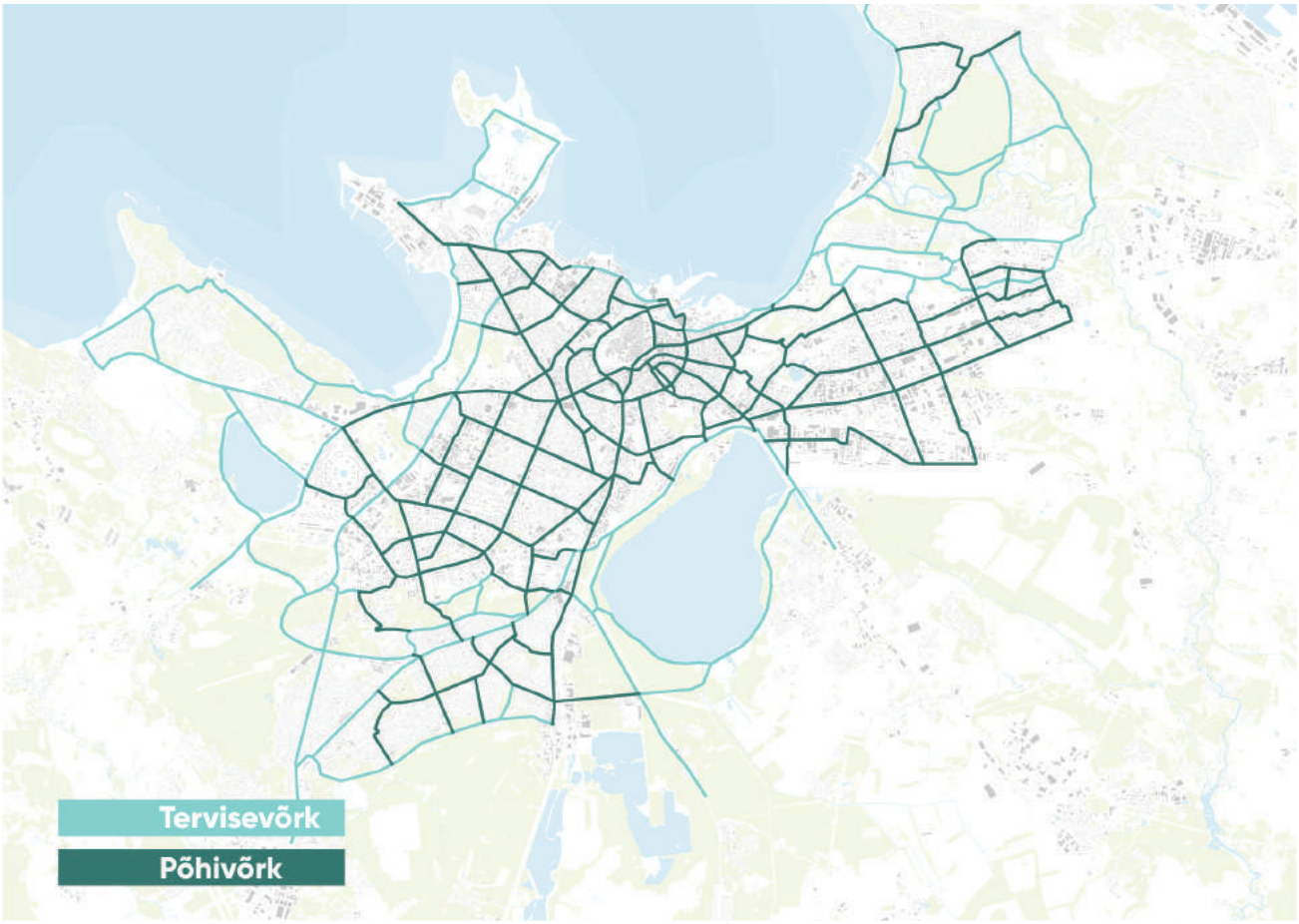


Figure 2.4. Tallinn's core cycle track network. Source: Tallinn Bicycle Strategy 2018–2027

(including electric ones) rental network across the city of Tallinn and organising it in co-operation with the private sector.

LINE OF ACTION 3: REGIONAL TRANSPORT NETWORK

3.1. Developing a common route network in co-operation with Harju County municipalities and the state. To this end, a memorandum of co-operation on mobility and settlement planning at the regional level will be concluded to bring the planning and contracting of services of all types of public transport under a single mobility organisation.

3.2. Switching to a common zone-based ticketing system uniting all types of public transport (train, inner city transport, county transport, commercial transport) and ticket types (including single journey tickets, hourly tickets, and period cards that are usable throughout the entire public transport system).

3.3. Expanding the network of high-speed and high-density public transport routes to new development areas in Harju County where it is currently unavailable: to Viimsi, Tabasalu, Peetri, and Jüri.

3.4. Creating Park & Ride car parks at public transport stops, train stations, and other connection points for those travelling to Tallinn from less populated exurbs.

3.5. Improving access to public transport (especially rail) by setting up light traffic connection points and bicycle parking facilities near public transport stops.

3.6. Shaping settlement patterns through planning in way that is favourable to sustainable mobility and which eliminates people's reliance on cars. Integrated planning of mobility solutions for new jobs, hubs, and social infra-

structure.

3.7. Developing smart transit routes and co-operation between Helsinki and Tallinn for routing port-related freight transport out of the city.

LINE OF ACTION 4: SUSTAINABLE FINANCING

4.1. Developing a joint financing model for the development of regional public transport, infrastructure, and mobility services, involving the City of Tallinn, Harju County municipalities, and national transport organisations, including the Road Administration, Eesti Raudtee, Elron, etc.

4.2. Establishing a building right fee to create clear and understandable rules for all on how to mitigate and offset the impact of the transport burden created by buildings, and to cover investment needs. The building right fee will be used to finance public transport, light traffic, and road maintenance investments needed to improve accessibility and meet mobility needs.

4.3. Implementing a dynamic road toll: a rush hour fee that helps to provide a more even flow of traffic and make travelling by both car and public transport more reliable.

4.4. A fair parking policy and parking fee system that enables financing the fixed costs related to mobility and road maintenance: collection of parking management fees in densely populated and highly utilised areas (for maintaining parking infrastructure and creating solutions to improve parking), parking zones that take into account the lifestyles in the area, parking fees for using parking spaces constructed next to employers and companies (the city taxes parking spaces located next to jobs and shopping centres). Implementing fees for extended parking.

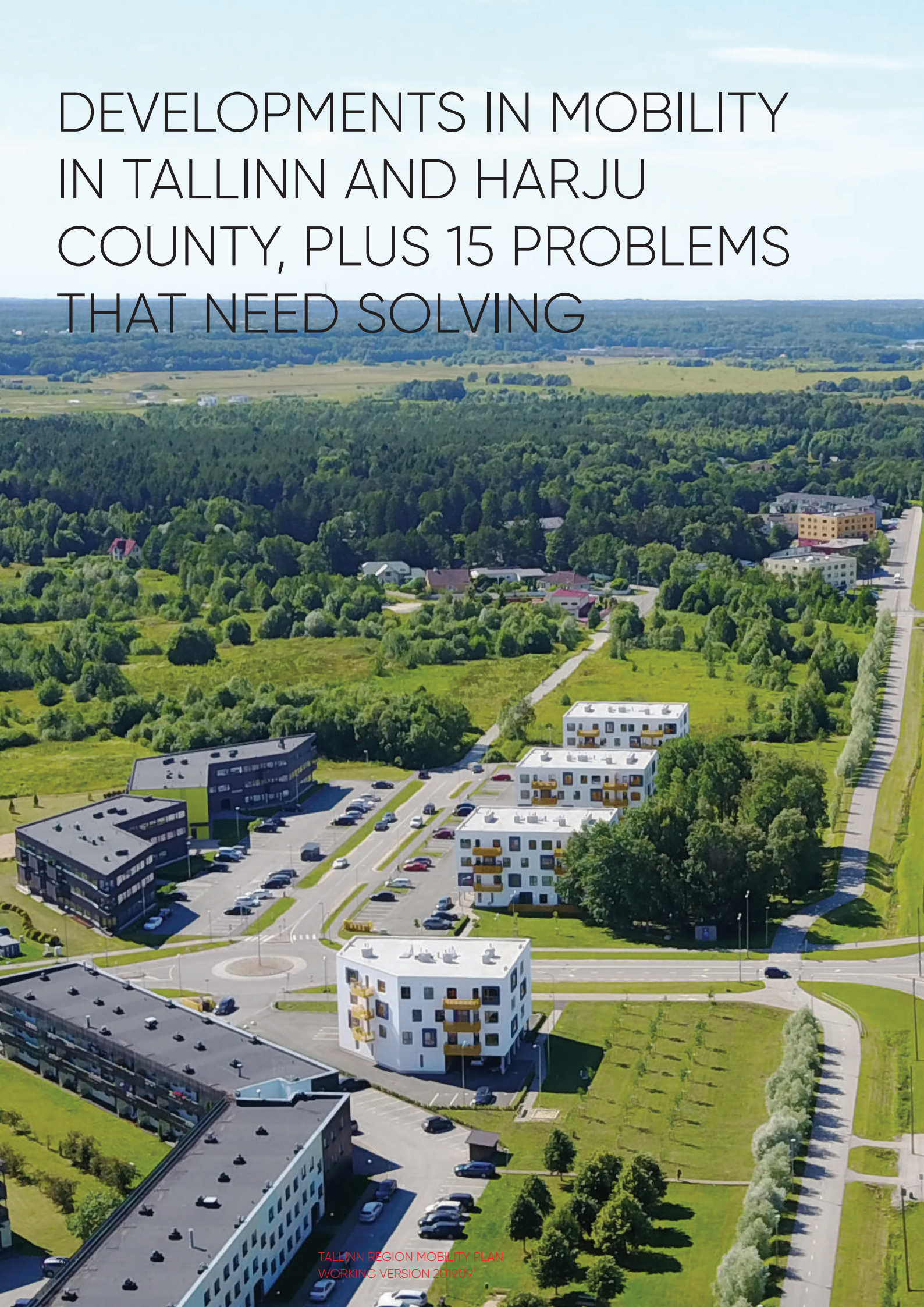
4.5. Involving state investments in the development of public transport and cycle tracks to achieve environmental objectives.

Table 2.1 lists the costs and the sources of funding of local and regional public transport in the Tallinn and Helsinki regions. The amount of subsidies and ticket revenue i.e. the total amount of public transport services per capita relative to national GDP in Harju County is 30% lower than in Helsinki. The share of public transport funding per capita granted by Harju County municipalities is almost 10 times lower than that of Tallinn.

Table 2.1. Comparison of public transport costs, revenue, and subsidies for the Tallinn and Helsinki regions

Source of financing	**€1,000/ year**	**€/resident/ year**	**No. of residents / user base**
City of Tallinn public transport subsidies	66,500	148	450,000
City of Tallinn public transport ticket revenue	4,600	10	450,000
Harju county routes, state subsidies	3,500	23	150,000
Harju county routes, municipality public transport costs	2,000	13	150,000
Harju county routes, ticket revenue	3,000	20	150,000
Elron, electric train state subsidies	10,000	17	600,000
Elron ticket revenue (approx. 30% of total revenue)	5,000	8	600,000
Total public transport subsidies for Harju County + Tallinn	82,000	137	600,000
Total public transport operating costs for Tallinn + Harju County	94,600	158	600,000
Compared to Finnish GDP per capita Tallinn could have	129,000	215	600,000
Helsinki region public transport HSL (bus, commuter rail, tram, subway)			
HSL subsidies, City of Helsinki and other municipalities	313,000	213	1,470,000
HSL subsidies, state and other	17,200	12	1,470,000
HSL ticket revenue	343,000	233	1,470,000
Total HSL public transport annual budget	673,200	458	1,470,000

DEVELOPMENTS IN MOBILITY IN TALLINN AND HARJU COUNTY, PLUS 15 PROBLEMS THAT NEED SOLVING



MOBILITY AND TRANSPORT TRENDS IN THE TALLINN REGION FOR 2000–2018

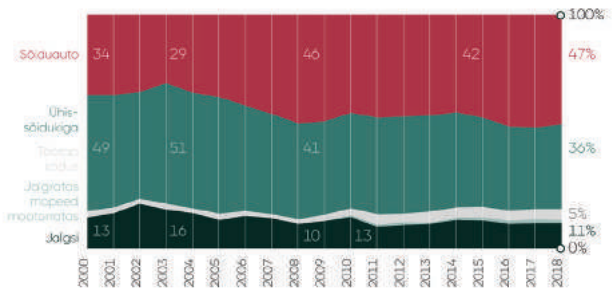


Figure 3.1. The main means of commuting for Tallinn's residents in the period 2000–2018. Source: Statistics Estonia

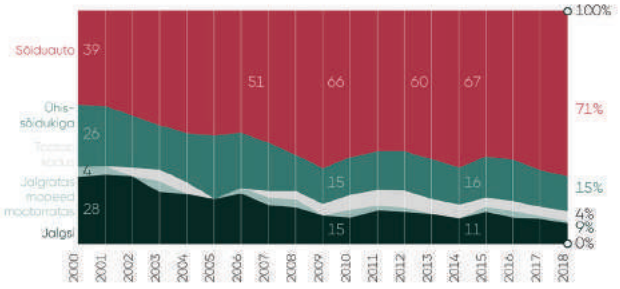


Figure 3.2. The main means of commuting for Harju County's residents in the period 2000–2018. Source: Statistics Estonia

CHANGES IN TRANSPORT DEMAND AND MEANS OF TRAVEL IN TALLINN AND HARJU COUNTY

In order to give a better understanding of the current status of mobility in Tallinn and Harju County and the greatest potential problems of near-future developments, we next discuss the main mobility indicators and bottlenecks. In the neighbouring municipalities of Tallinn, where many new residential and industrial areas have been built in the last 15 years, the biggest changes in the way people travel started in 2004. As a result, the residents of the rural municipalities surrounding the capital travel to Tallinn for work and school in the morning, while the residents of the so-called dormitory suburbs of Tallinn travel to offices in the surrounding industrial areas. The residents of Harju County's new settlements are particularly notable for the high percentage of car users among them. Compared to the Helsinki region, commuting in the Tallinn region is car dependent.

The traffic load and the share of car users among the residents of Tallinn and Harju County have constantly increased. As the purchasing power of the population improves, mobility in the Tallinn region has also increased steadily. New residential areas and the relocation of jobs and hubs have increased daily travel distances and have reduced foot traffic and the competitiveness of current public transport services compared to cars. As regional public transport has not been able to adapt to the increased commuter traffic between Tallinn and its

exurbs, the need for car travel has increased.

According to the Labour Force Survey of Statistics Estonia, there has been a significant decrease in the share of those commuting by public transport (from 50% to 36%) or foot in Tallinn over the last 18 years, while the share of those travelling by car among Harju County's residents has grown from 25% to nearly 60% (see Figures 3.1 and 3.2.) This is primarily due to the relocation of jobs and homes and the emergence of new developments in places where there is no proper public transport and walking and cycling distances are too long. Ownership and usage of cars (see Figure 3.5) has also increased due to higher purchasing power and better financing opportunities, which have made it possible to move both homes and jobs from Tallinn to Harju County, where buildings are modern and more affordable, but where public transport services and light traffic paths are not yet comparable in quality or the number of links. As a result, public transport is no longer an option for many in the capital region, and cars are preferred instead (Figure 3.6). In Tallinn and Harju County, the total annual vehicle mileage has increased to 2.5 times that of 18 years ago (Figure 3.3). In the last six years alone, the number of vehicles crossing the city limits daily has increased by 28,000 (Figure 3.4).

Access to good public transport links for people and jobs based in Harju County has decreased as a result of settlement becoming less dense. Convenient and fast links still exist near the main public transport and railway corridors. However, often, even living near a public transport route does not mean that people have access to good public transport links, because the route does not cover their destination or travel at suitable times.

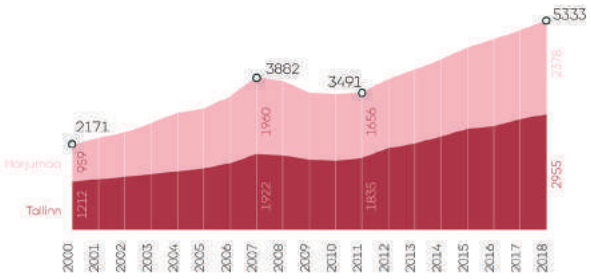


Figure 3.3. Vehicle mileage in Tallinn and Harju County in the period 2000–2018 (million kilometres). Source: Estonian Road Administration

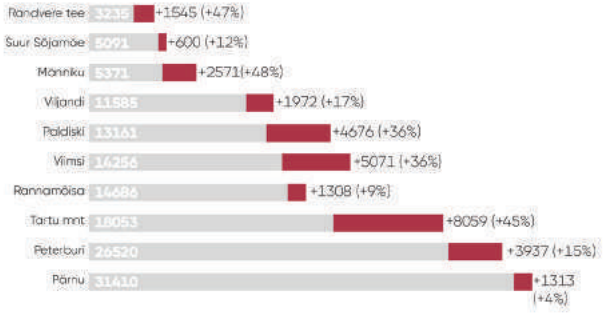


Figure 3.4. Change in traffic volume at Tallinn's city limits, 2012 and 2018. Source: Estonian Road Administration.

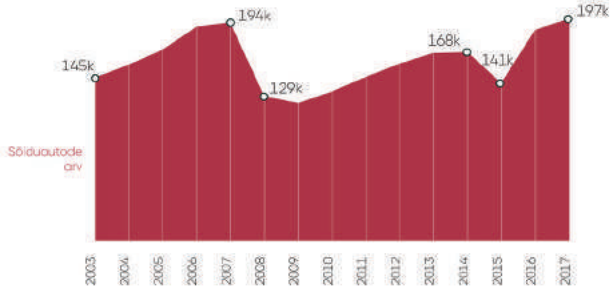


Figure 3.5. Number of passenger cars registered in Tallinn, 2010–2017. Source: Statistical Yearbook of Tallinn 2018

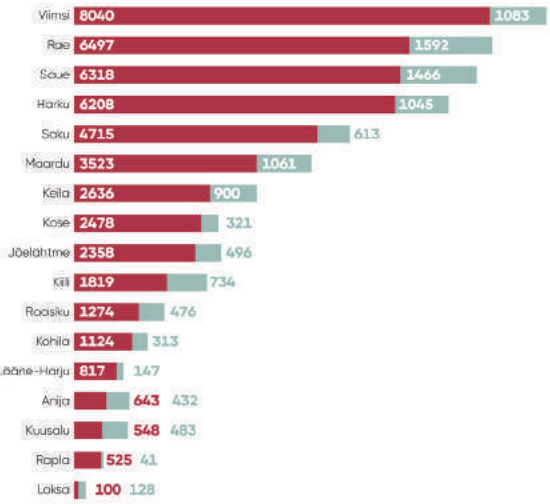


Figure 3.6. Number of people commuting by car (red) and foot (green) from rural municipalities in Harju County to Tallinn in 2017. Source: Kantar EMOR, 2017

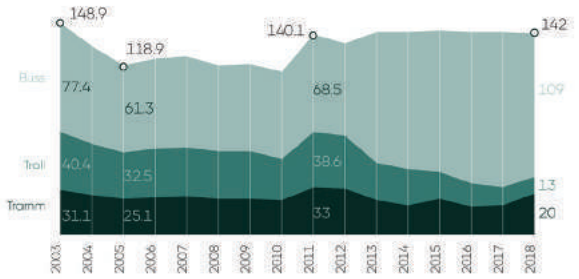


Figure 3.7. Number of journeys on Tallinn's public city routes per year (millions)

Source: Statistical Yearbook of Tallinn 2019

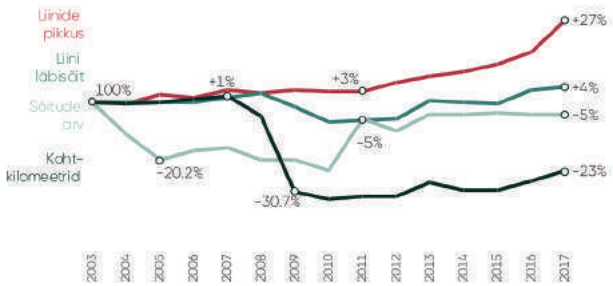


Figure 3.8. Changes in the provision of Tallinn's public transport services

Source: Statistical Yearbook of Tallinn 2018

CHANGE IN THE NUMBER OF PUBLIC TRANSPORT USERS BETWEEN 2003 AND 2018 ON PUBLIC ROUTES IN TALLINN AND HARJU COUNTY

There are four different public transport service systems in the Tallinn region: Tallinn's city routes, which are operated by the municipal enterprise TLT (bus, tram, trolleybus), with the service orders managed by the Tallinn Transport Department and the operating costs covered by city the budget; Harju County's public bus routes, which are managed by Põhja-Eesti Ühistranspordikeskus and the operation of which is subsidised from the state budget; domestic rail routes (including commuter rail), which are managed by AS Elron and the operation of which is subsidised from the state budget. In addition to the above, in Harju County, public transport services are also provided by so-called commercial carriers, whose operations are funded from ticket revenues. There is no systematic data available on commercial carrier ticket sales, passenger numbers, and route statistics by year.

The number of users of Tallinn's city routes decreased both in the first half of 2000 and during the recession, but increased in 2011, when employment had recovered after the 2008 economic crisis, and in 2013, when public transport was made free for Tallinn's residents. Over the last six years, the number of public transport users has remained stable, with about 140 million journeys a year (see Figure 3.7).

The total length of Tallinn's public transport routes and the mileage of public vehicles serving the routes have increased over the last 15 years. The number of public transport seat-kilometres (which reflects the total volume of public transport services) and the number of journeys decreased significantly during the 2008 economic crisis, but have recovered somewhat thanks to the new period of economic growth and increased number of residents, however they are still lower than 10 years ago.

With the introduction of new comfortable and fast trains, some of those travelling in Tallinn as well as in Harju County have started using trains more often. The number of passengers on electric trains and county bus routes has increased significantly in the last 8 years: from around 5 million passengers per year to more than 8 million (Figure 3.9). The number of passengers has increased due to the growth of the population and the number of jobs, due to the very frequent and comfortable passenger trains on the Keila route, and the continuous improvement of the Harju County public bus service (see Table 3.1). Compared to the total volume of public transport usage (148 million journeys per year), the total number of public transport users in the region has not been significantly affected (Figure 3.9).

Operating costs and ticket revenue of public transport

The operating costs of Tallinn's public transport and the costs covered from the city budget have been constantly increasing over the last 15 years. In spite of population growth, employment recovery, and the free access to public transport of Tallinn's residents, the number of public transport users in the city has not increased significantly nor has it influenced the trend of rapidly increasing car ownership.

The number of users and ticket revenue of Harju County's public bus services had been increasing up to 2017 (Table 3.1). From July 2018, the public county bus services have been free to all persons aged 0–19 and 63+.

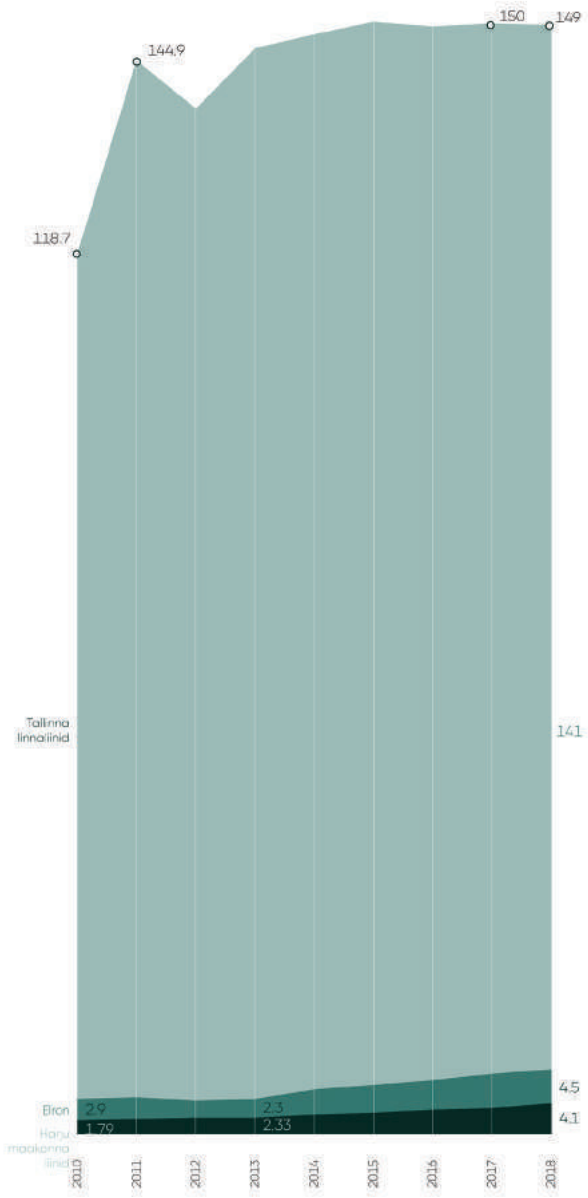


Figure 3.9. Number of passengers on public transport routes in Tallinn and Harju County Source: City of Tallinn, Elron, Estonian Road Administration

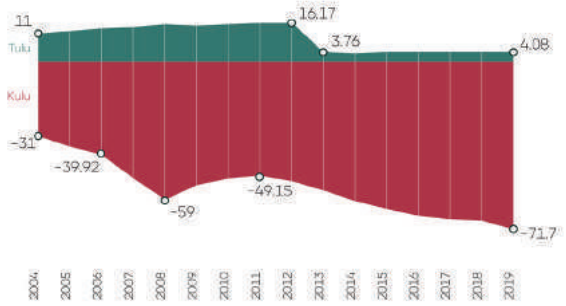


Figure 3.10. Changes in the operating costs and ticket revenue of public transport in the city of Tallinn, 2004–2019

Source: Statistical Yearbook of Tallinn 2018, Tallinn Transport Department

Table 3.1. Public bus routes of Harju County 2012–2018

	2012	2013	2014	2015	2016	2017	2018
Ticket revenue €M	2.052	2.327	2.475	2.832	3.169	3.437	3.062
Number of journeys, million	2.298	2.300	2.534	2.860	3.167	3.499	4.173
Route mileage, million route km	4.434	4.901	5.383	5.790	6.277	6.582	7.368
Ticket revenue per passenger, €/journey	0.89	1.01	0.98	0.99	1.00	1.02	0.73
Subsidies, €M	3.968	2.605	2.7	2.8	2.9	3.069	4.028

13 MOBILITY-RELATED CHALLENGES AND PROBLEMS THAT NEED SOLVING IN THE TALLINN REGION

Travel times and costs are increasing

Commuting has increased in Tallinn and Harju County both from the county to Tallinn and back, as a result of which the number of cars on the road has increased by about 21,000 over the last six years (with a total of 30,000 more people travelling to work by car). This causes traffic congestion on the roads of Tallinn and Harju County and increases average driving times. By 2035, the population of the Tallinn region is projected to grow by 60,000, including 45,000 people in the city of Tallinn. Increased traffic and congestion increases the time it takes to travel both by car and public transport. As travelling by public transport takes more time due to transfers and walking, an increasing number of residents of Tallinn and Harju County are deciding in favour of cars to save time. This in turn slows down traffic for all motor vehicles. Thus far, traffic congestion has been attempted to be reduced by expanding major roads and building multi-level junctions (Haabersti junction, Järvevana tee and Ülemiste junction, Tartu mnt and Vabaduse pst, Männiku tee expansion, Põhja väil, Tammsaare tee expansion, Tehnika street extension). However, this has been largely unsuccessful as congestion has simply shifted to the next bottleneck, and travel times have not decreased, because the number of cars and car journeys has increased significantly.

Taking into account the total mileage of cars and the average total cost per kilometre (€0.3/km) of travel by car, businesses and individuals are currently spending about 1.4 billion euros on car ownership and usage in Tallinn and Harju County, i.e. twice the annual budget of the City of Tallinn (Figure 3.13). This direct cost of car purchase/leasing, fuel, repairs, etc. is borne both by the

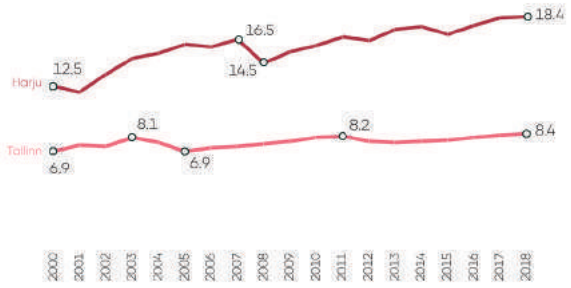


Figure 3.11. Average distance between the place of residence and place of work of residents of Tallinn and Harju County in 2000–2018.

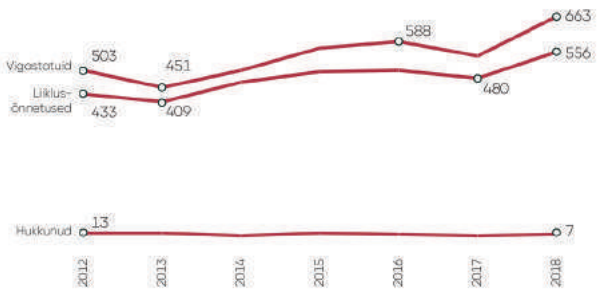


Figure 3.12. Average time (minutes) of commuting to work from home in Tallinn and Harju County, 2000–2018.

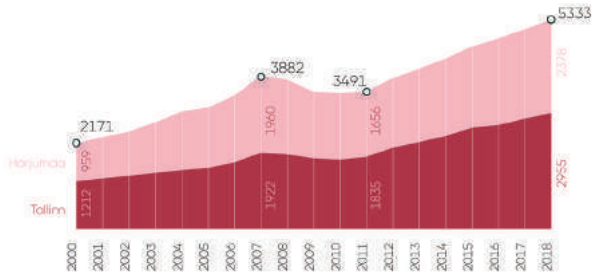


Figure 3.13. Costs of owning and using a car in Tallinn and Harju County (€M/year), 2000–2017. Source: calculations by the authors of the Strategy

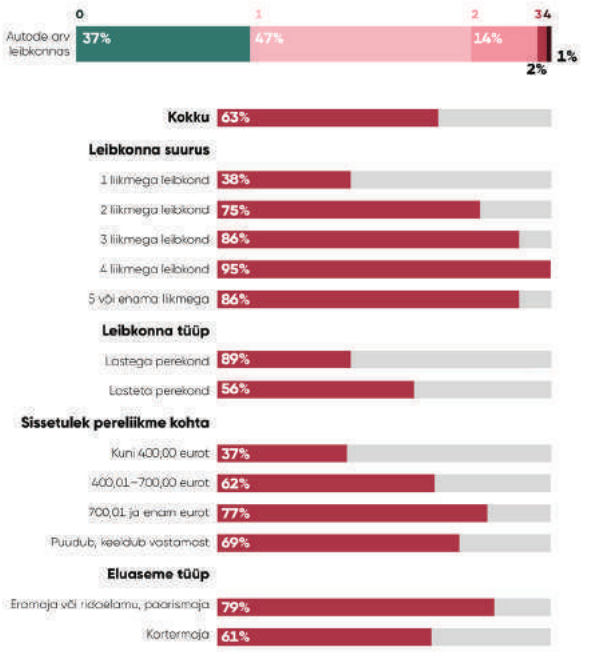


Figure 3.14. Ownership of passenger cars in Tallinn by household size, type, type of housing, and income Source: survey of mobility habits of Tallinn's residents, 2015. EMOR, 2015

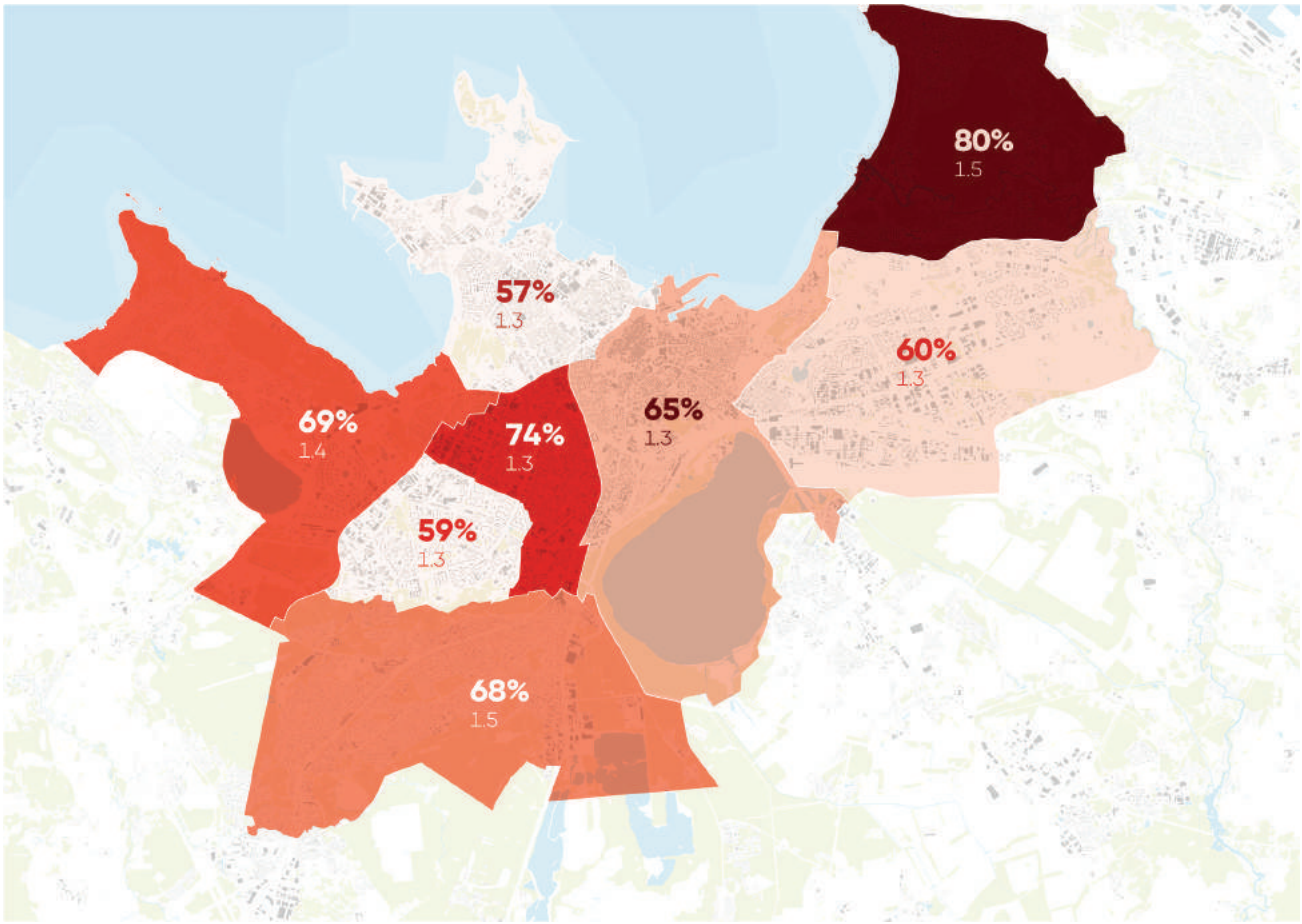


Figure 3.15. Share of car-owning households (% of households with at least 1 car) and average number of cars per household by districts of Tallinn Source: survey of mobility habits of Tallinn's residents, 2015, EMOR

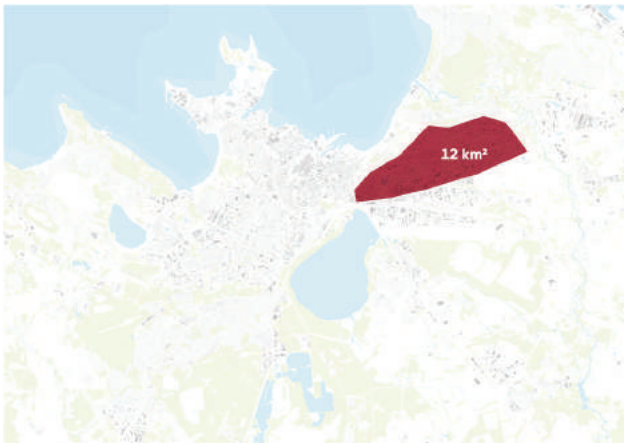


Figure 3.16. The parking spaces for the approximately 250,000 cars in Harju County and Tallinn occupy an area of approximately 12 km².

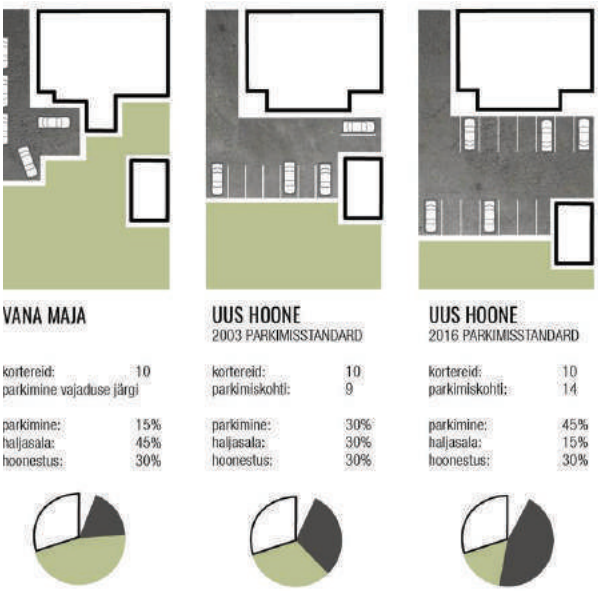


Figure 3.17. Increase of space requirements in the yards of residential buildings due to increasing car ownership and parking requirements. Source: Tõnis Arjus, Sirp 2019.

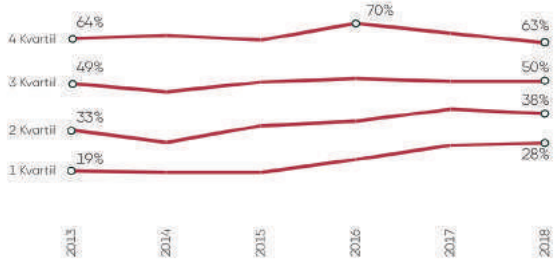


Figure 3.18. Distribution of residents of Tallinn commuting by car by income quartile, %. Source: Statistics Estonia

CARS ARE TAKING UP MORE AND MORE VALUABLE URBAN SPACE

Each additional car in the city requires parking space, not only near the user's place of residence, but also at their travel destinations. In Tallinn, it is estimated that there are approximately 2–3 parking spaces for each passenger car, which equals 40–60 m² of parking space, which requires construction, maintenance, lighting, and repair. The cost of a parking space built for each new dwelling is €3,000–15,000, which in turn increases the cost of dwellings and takes away valuable space from other activities. (See also chapter 4.)

The cost of building a parking space ranges from EUR 3,000 (open-air parking) to EUR 15,000 (parking building, underground car park), which in turn increases the cost of dwellings and the cost of living as a whole.

Expanding roads and street networks and constructing parking spaces increases the costs of construction and subsequent infrastructure maintenance. Expanding individual streets to solve problems related to car traffic does not increase the capacity of the entire road network and does not address higher traffic loads at the destinations. As the number of cars increases, there will be less space and money for economical public transport, which will no longer be able to provide their services at the same speed. As public transport becomes less competitive, people's need to make their unavoidable daily journeys by car will increase further. Ever-increasing congestion will lower the competitiveness of businesses in Tallinn and Harju County in both freight transport and the provision of services, as well as the mobility of their employees and saving time.

DEPENDENCE ON PERSONAL CARS AND THE RESULTING INEQUALITIES ARE GROWING. TRAVEL BY PUBLIC TRANSPORT AND FOOT IS DECREASING

Despite the fact that the Helsinki region is growing much faster than Tallinn, there has been no increase in car usage there in the last 10 years, and car usage is even

expected to decline there in the future.

Expanding roads and street networks and constructing parking spaces increases the costs of construction, dependence on personal cars, and the resulting inequalities. Travel by public transport and foot is decreasing

Despite the fact that the Helsinki region is growing much faster than Tallinn, there has been no increase in car usage there in the last 10 years, and car usage is even expected to decline there in the future.

Expanding roads and street networks and constructing parking spaces increases the costs of construction and subsequent infrastructure maintenance.

TRANSPORT-RELATED ENERGY CONSUMPTION AND GREENHOUSE GAS EMISSIONS ARE INCREASING

Transport has a major environmental impact that cannot be solved solely with new vehicle technologies. Transport-related greenhouse gas emissions and energy consumption in Estonia, including Tallinn, have been increasing due to the continuous growth of car traffic and road transport. Tallinn accounts for more than ⅓ of Estonia's total CO_2 emissions, around 50% with Harju County, and the Tallinn region has the greatest potential to reduce transport-related emissions thanks to its high population density and the huge and untapped potential of public transport and light traffic.

If current trends continue, transport and car usage will either make it impossible to achieve the greenhouse emissions targets pursued under Estonia's climate policy and set by Tallinn in the Covenant of Mayors, or they will make it increasingly difficult and costly to achieve these targets if corrective actions are put off.

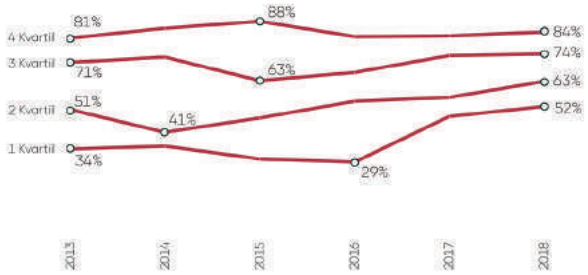
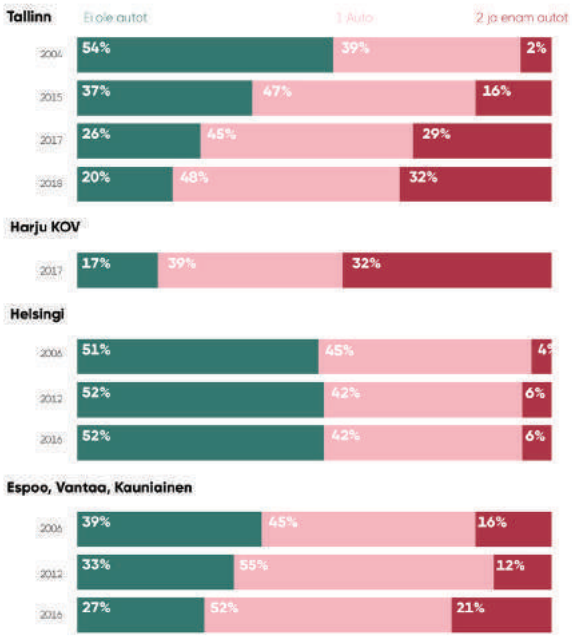


Figure 3.19. Distribution of residents of Harju County commuting by car by income quartile, %. Source: Statistics Estonia



Joonis 3.20. Car ownership in the Tallinn and Helsinki regions by household, 2004–2018. *Single-person households make up 48% of all households in Helsinki and 38% in Tallinn. Sources: SaarPoll 2004, Emor 2015, Emor 2017, Eesti Uuringute Keskus 2018, HSL 2018.

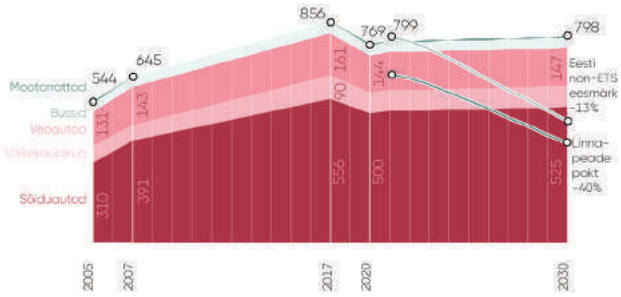


Figure 3.21. CO_2 emissions from transport in Tallinn in the baseline scenario, Estonia's CO_2 emission reduction target, and the target set by the Covenant of Mayors for 2030. Sources: Energy Agency of Tallinn, Estonian Environmental Research Centre, 2019

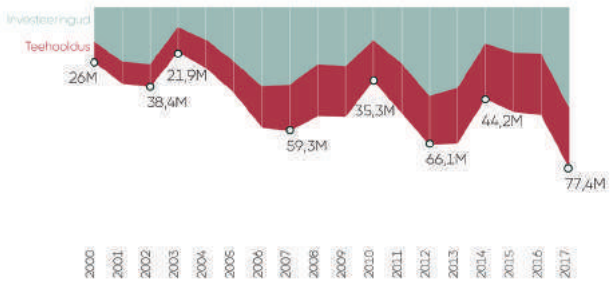


Figure 3.22. Road maintenance costs in the city of Tallinn (€M).

Source: Statistical Yearbook of Tallinn 2018

Figure 3.23. Road maintenance costs and revenue for Tallinn and Harju County in 2018 (€M/year). Source: Statistical Yearbook of Tallinn. Estonian Road Administration

Figure 3.24. Public transport revenue and expenditure for Tallinn, Harju County Public Transport Centre, and Elron in 2018 (€M/year). Sources: Elron, North-Estonian Public Transport Centre, Tallinn City Government

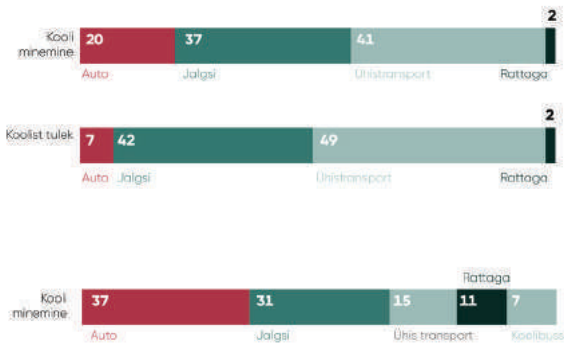


Figure 3.25. Main means of travelling to school for schoolchildren in Tallinn and Harju County

Source: Survey of satisfaction among Tallinn's residents concerning public services, 2017; survey of mobility habits in Harju County (Kantar EMOR 2018).

ROAD MAINTENANCE AND PUBLIC TRANSPORT COSTS ARE INCREASING. THE EXISTING ROAD NETWORK HAS A CONSIDERABLE BACKLOG OF REPAIRS

Maintaining the transport system is costly for both the public and the private sector and requires carefully selected solutions that support the performance of all means of transport as a whole. The organisation and financing of the transport system require increasing co-ordination between different means of transport, administrative levels, and authorities. Regional public transport management (including a common ticket system for all types of public transport) requires agreements at city and state level and new models of co-operation. Most major projects have been co-financed by the European Union. It is clear that solutions to cope with the ever-increasing volume of traffic are becoming more and more expensive as the city becomes denser and space is scarce.

THE INDEPENDENT MOBILITY OF SCHOOLCHILDREN IS DECREASING

The independent daily mobility of schoolchildren has decreased due to urban sprawl and increased car ownership. This has a significant impact on public health and creates problems for families in day-to-day logistics. Complicated traffic management and travel difficulties during the winter season are not conducive to the independent movement of the growing proportion of elderly people in the city. A mobility environment that facilitates daily walking and cycling for people of all ages and is accessible to people with special needs, makes the city attractive for families and is important for maintaining both the living environment and public health.

As parents increasingly take their children to school and sports practice by car, sedentary lifestyles among schoolchildren become more prevalent, while time spent outside in fresh air decreases, which affects both children's health and learning outcomes. It also leads

to an increase in dangerous traffic situations as traffic between and near educational institutions increases. Therefore, the location of kindergartens, schools, and hobby schools is an important influencer of mobility and traffic, which must be taken into account in future urban planning in Tallinn and neighbouring municipalities.

At the moment, we are seeing a 20% reduction in the number of cars in traffic in connection with school transport during school holidays. This is mainly due to the fact that parents who drive their children to school on a daily basis take time off from work during their children's school holidays and thus do not participate in car traffic in the city during rush hour. Thus, many parents of school-age children spend their mornings and afternoons performing the tasks of public transport, because the public transport services of Tallinn and Harju County do not provide sufficiently fast and convenient links between schools and children's homes.

THE NEGATIVE HEALTH EFFECTS OF TRANSPORT (NOISE, POLLUTION, LOW PHYSICAL ACTIVITY, STRESS) ARE INCREASING

Fine particulates in the air, which to a large extent originate from transport, cause the premature death of approximately 300 residents of Tallinn per year (http://rahvatervis.ut.ee/bitstream/1/731/1/Orru2007.pdf). Emissions and noise need to be reduced and further fragmentation of the green areas and recreational areas of Tallinn and its surroundings must be prevented.

NEW DENSELY PACKED DEVELOPMENTS ARE CROPPING UP IN AREAS WITH POOR PUBLIC TRANSPORT LINKS

The mobility needs and preferred means of travel of future residents, employees, and customers depend on the planning of new developments and the location of jobs. In addition to the urban sprawl that took place during the economic boom, car usage has also increased due to the relocation of jobs. Areas around

Figure 3.26. Road traffic noise map of the streets of Tallinn.

Source: Daily Road Traffic Noise Map of Tallinn, 2015.

Figure 3.27. Air quality index for Tallinn, measured at Liivalaia Air Quality Monitoring Station from February to April 2019.

Source: http://airindex.eea.europa.eu/

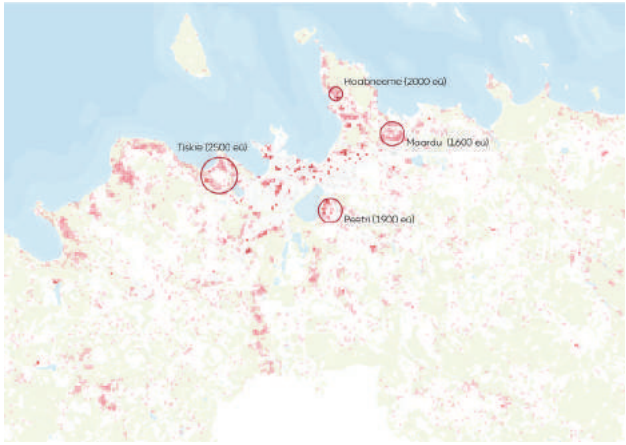


Figure 3.28. Number of dwelling units located in areas with poor public transport access.

Source: Raul Kalvo 2019

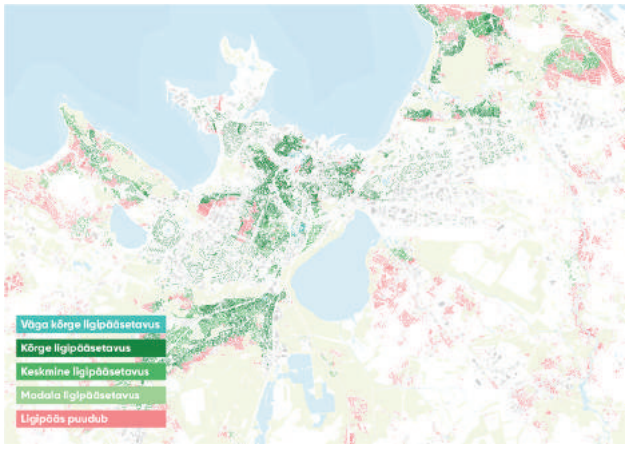


Figure 3.29. Good access to public transport and location of residences (the greener square, the greater the number of residences with good public transport access in the area; the redder the square, the greater the number dwelling units with poor public transport access in the area)

Source: Raul Kalvo, 2019.

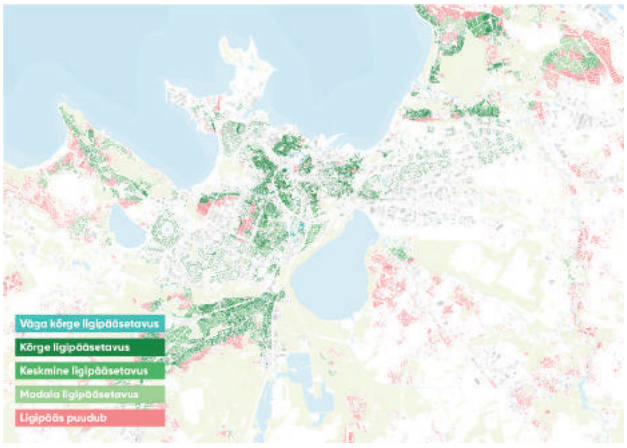


Figure 3.30. Location of businesses and level of public transport service in 2019 (red indicates poor public transport access and green indicates good public transport access in the area) Source: Raul Kalvo, 2019 (peatus.ee; data from Inforegister).

exurban train stops in the vicinity of Tallinn are relatively sparsely populated and the potential of travel by rail is largely untapped compared to travel by tram, trolleybus, and bus. Tapping that potential will require much more effective integration of spatial planning and transport management. The Tallinn Mobility Plan 2035 analyses which areas should be given priority for development to achieve sustainable mobility on the basis of existing efficient public transport routes, where it would be possible to create better conditions for the use of trains, trams, and high-capacity bus routes.

The figure shows densely populated residential areas in Tallinn and its vicinity where public transport access is poor. According to indicators developed in the European Union, good public transport access can be claimed in areas that are located within 400 metres of a public transport stop with an average of at least ten departures per hour.

When building new developments, the only mobility-related investment required from developers is the construction of parking spaces, as a result of which many developments lack public transport services and comfortable light traffic paths. Currently, the only requirements regarding traffic in Tallinn and the mobility needs of residents which are taken into account during the construction of new buildings are parking requirements (i.e. developers are required to construct a certain number of parking spaces per each square metre of apartment or commercial space – see also chapter 4). There are no other requirements that directly support the mobility of the population, and where necessary, support for any new traffic links is negotiated separately with developers.

The mobility needs and preferred means of travel of future residents, employees, and customers depend on the planning or non-planning of new developments and the location of jobs. In addition to the urban sprawl that took place during the economic boom, car usage has also increased due to the relocation of jobs.

Figure 3.29 shows the distribution of dwellings in the Tallinn region by level of public transport service.

The public sector has largely failed to seize opportunities to direct new developments to areas with good public transport links (rail, frequent trolleybus and bus service) and avoid the dense settlement of people in areas with poor public transport links.
Areas around exurban train stops in the vicinity of Tallinn are still relatively sparsely populated and the potential

of travel by rail is largely untapped compared to the capacities of trams, trolleybuses, and buses. Tapping that potential will require considerably more effective integration of spatial planning and transport management.

THE PUBLIC TRANSPORT SERVICES OF TALLINN AND HARJU COUNTY ARE FRAGMENTED AND THEIR TICKETING SYSTEMS ARE NOT CONDUCIVE TO COMBINING MULTIPLE MEANS OF TRAVEL

In Tallinn and Harju County, common public transport period cards are used on Tallinn's city routes and Harju County's bus routes, as well as Tallinn's routes and Elron trains. However, there is no common monthly card that is valid for all three operators' services, nor a common single journey ticket for convenient and affordable cross-usage of public transport services. Common monthly cards would allow regular public transport users to benefit from lower fares. The number of period ticket purchasers indicates the number of regular public transport users, i.e. loyal customers. Given that nearly 120,000 commuters travel between Tallinn and Harju County daily, the currently paltry number of 1,400 common period card users indicates that developing a common ticketing system could significantly increase the number of public transport users as well as loyal customers. Currently, for example, commuting between Keila and Tallinn costs around 100 euros per month in total if paying for the monthly cards of all three service providers (Elron, TLT, county buses); meanwhile, transferring from a train to a tram using single journey tickets is disproportionately expensive and is not conducive to transfers between and cross-usage of the public transport systems.

Although the number of users of electric trains and Harju County routes is increasing, especially on western train routes and routes passing through Harku, where buses fill up quickly with the addition of new departure times, the potential of public transport is untapped. The bottlenecks here are the lack of good links between new residential areas, new hubs, and jobs; the lack of fast direct links between major destinations; the lack of convenient options for transfers and combining of different types of public transport; the lack of a jointly managed route network, schedules, and ticketing system; and the lack of Park & Ride car parks at the edge of the city for those travelling to the city from sparsely populated areas.

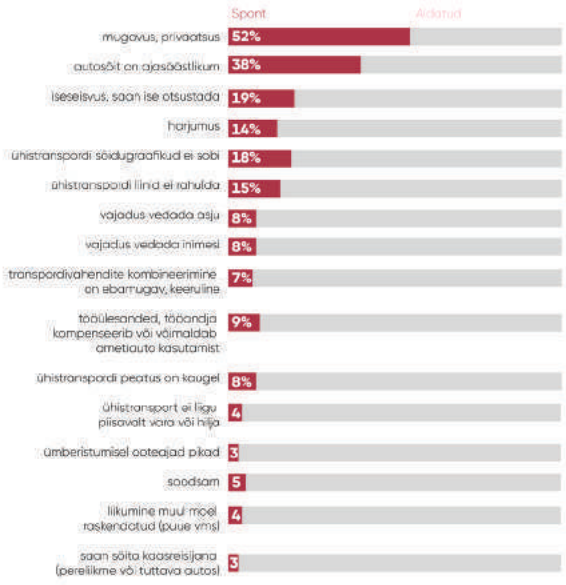


Figure 3.31. Reasons why residents of Harju County prefer a car.

Source: Kantar EMOR, 2017

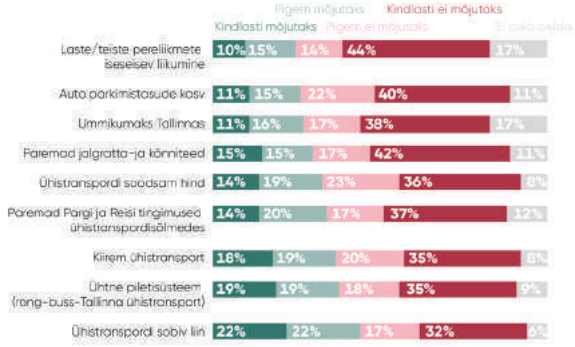


Figure 3.32. Willingness of residents of Harju County who drive a car to use public transport and/or a bicycle.

Source: Kantar EMOR, 2017

Table 3.2. Average number of monthly users of public transport period cards in Tallinn and Harju County.

Source: Tallinn Transport Department

	2011	2012	2013	2014	2015	2016	2017
Tallinn-Harju	993	902	874	810	807	820	870
Tallinn-Elron	687	608	339	487	502	507	513
Total period card users	1,680	1,510	1,213	1,297	1,309	1,327	1,382

THE CITY STREETS ARE NOT ATTRACTIVE FOR WALKING AND CYCLING. THE ELDERLY AND PEDESTRIANS ARE STILL HIGHLY VULNERABLE IN URBAN TRAFFIC AND ROAD SAFETY IS POOR

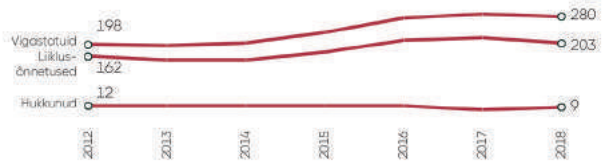
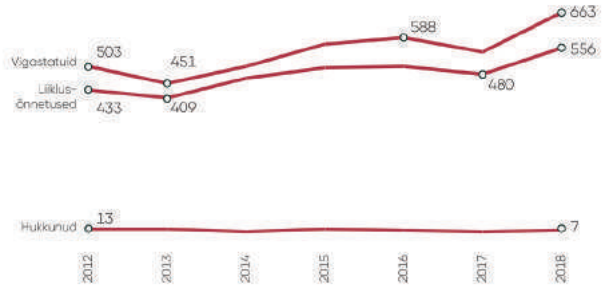


Figure 3.33. Traffic accidents in Harju County, 2012–2018. Source: Estonian Road Administration.



Joonis 3.34. Traffic accidents in Tallinn, 2012–2018. Source: Estonian Road Administration

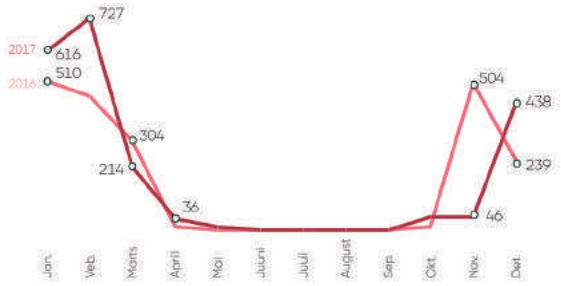


Figure 3.35. Falls due to snow and ice in Tallinn in 2016 and 2017. Source: National Institute for Health Development.

In the last seven years, the number of traffic accidents and traffic injuries in Tallinn and Harju County has increased. The number of fatal traffic accidents is, however, dropping slightly. In 2018, there were 1,464 traffic accidents where people were hurt in Estonia, including 67 deaths and 1,823 persons injured; Tallinn and Harju County account for approximately 50% of the total number of traffic accidents in Estonia and 50% of traffic accidents resulting in injury.

It is more important than ever that streets be made to accommodate different users, which, where necessary, means using traffic calming measures. Equally important is that public transport stops and sidewalks be designed and constructed or reconstructed in a way that increases the safety of pedestrians. In order to improve safety, the traffic environment must be actively shaped to match the function of the street and promote safe and sustainable traffic behaviour, in particular by reducing speeding.

With regard to road maintenance, attention needs to be paid to the situation of pedestrians and the condition of sidewalks, which are significantly less accessible during the winter season, because their maintenance is the duty of the owner of each adjacent plot. As a result, the maintenance of sidewalks is often inconsistent in the winter and makes it difficult for pedestrians and other non-car users to get around. Figure 3.35 shows how, according to data from the National Institute for Health Development, during the winter months, snow and ice are responsible for around five hundred additional injuries among Tallinn's residents. This significantly reduces the mobility of the elderly for almost half a year as they do not want to risk trauma and hospitalisation on slippery and poorly maintained sidewalks.

DATA ON THE USE OF AND NEED FOR DIFFERENT MEANS OF TRAVEL ARE PATCHY

We have a lot of data on vehicle traffic volumes (permanent counting points and random censuses administered by the Estonian Road Administration and Tallinn Transport Department), but there is no systematic overview and information on people's movements, the purpose of their movements, and the reasons for their choice of means of travel. The state and municipalities do not carry out any systematic monitoring of people's movements and the factors affecting out. As such, the proposed transport solutions are focused on improving vehicle movements (e.g., road surface and capacity improvement).

The Mobility Plan has been drawn up and the options have been assessed on the basis of studies and strategic analyses that look at how and where it is appropriate to act to achieve the objectives of the Mobility Plan: what the impacts of different alternatives are, which actions are effective and feasible both financially and in taking different interests into account. Where the necessary data have not been available, the experience and tested practices of neighbouring countries and cities have been used. The Tallinn Mobility Plan 2035 has been prepared with support from the City of Helsinki and other European cities that have drawn up a mobility plan. In order to implement the Tallinn Mobility Plan 2035, it is necessary to agree on the monitoring of its implementation and the updating of the plan.

THE POTENTIAL OF INNOVATIVE MOBILITY SERVICES REMAINS UNTAPPED

As Tallinn is a major business and economic centre, where the movement of people, goods, and information is essential, it is necessary to develop new transport solutions that bring together public transport services, logistics, combined transport, and new technologies for its effective as well as environment-friendly functioning. It should be borne in mind, however, that new transport and logistics technologies, such as electric vehicles, self-driving vehicles, and delivery robots can both solve current mobility and environmental problems as well as create new bottlenecks.

The success of innovative mobility services such as ridesharing, car and van sharing, bike and electric scooter sharing, courier services, integrated payment and real-time information systems, and integrated mobility service package solutions depends on a well-functioning basic public transport service and a street network that is kept in good condition all year round. New mobility and freight transport services make it easier, faster, and safer to combine different means of travel, and reduce dependence on personal cars. It is important to adapt to new mobility services entering the market and to be prepared to integrate them into the existing transport system by focusing on accessibility and the movement of people and goods instead of that of vehicles.

CURRENT SITUATION AND BOTTLENECKS IN FREIGHT TRANSPORT LOGISTICS

Traffic censuses show a continuing increase in freight transport volumes. The traffic load of road trains on major roads entering Tallinn has increased sharply since 2010. Census data show that although freight traffic mainly flows around the city centre on its outskirts, a considerable amount of freight traffic does still flow through the city and not via the Tallinn Ring Road. Another major source of traffic is commerce, where goods are often delivered without co-ordination and predominantly on business days. Thus, most of the load falls on peak times in downtown traffic. Particularly problematic is the organisation of freight transport in the Old Town, where established time limits are not respected. Possible solutions to this situation include analysing solutions that are used elsewhere, such as consolidation centres, or changes in delivery times, as well as freight bicycles for deliveries in the city centre. In urban logistics, e-commerce is a growing generator of traffic. Information on the volumes and routes of freight transport in Tallinn is patchy, especially for intra-city transport.

PARKING POLICY IN TALLINN – CURRENT STATUS AND FUTURE LINES OF DEVELOPMENT

PARKING POLICY IN TALLINN – CURRENT STATUS AND FUTURE LINES OF DEVELOPMENT

As part of the parking policy study carried out by SPIN Unit, a map of Tallinn's parking spaces was drawn up, combining different data sources (parking space data from the City of Tallinn, Register of Buildings, Tallinn Spatial Data Register; mobile parking data from EuroPark and AS Ühisteenused; Parking Census 2012, and parking spaces on the streets and in open car parks as mapped by SPIN Unit). Street parking spaces here and hereinafter refer to paid parking areas in the city of Tallinn, which are operated by AS Ühisteenused, and off-street parking spaces refer to all car parks operated by EuroPark and other service providers. (For interactive maps, see http://www.spinunit.eu/metalinn/)

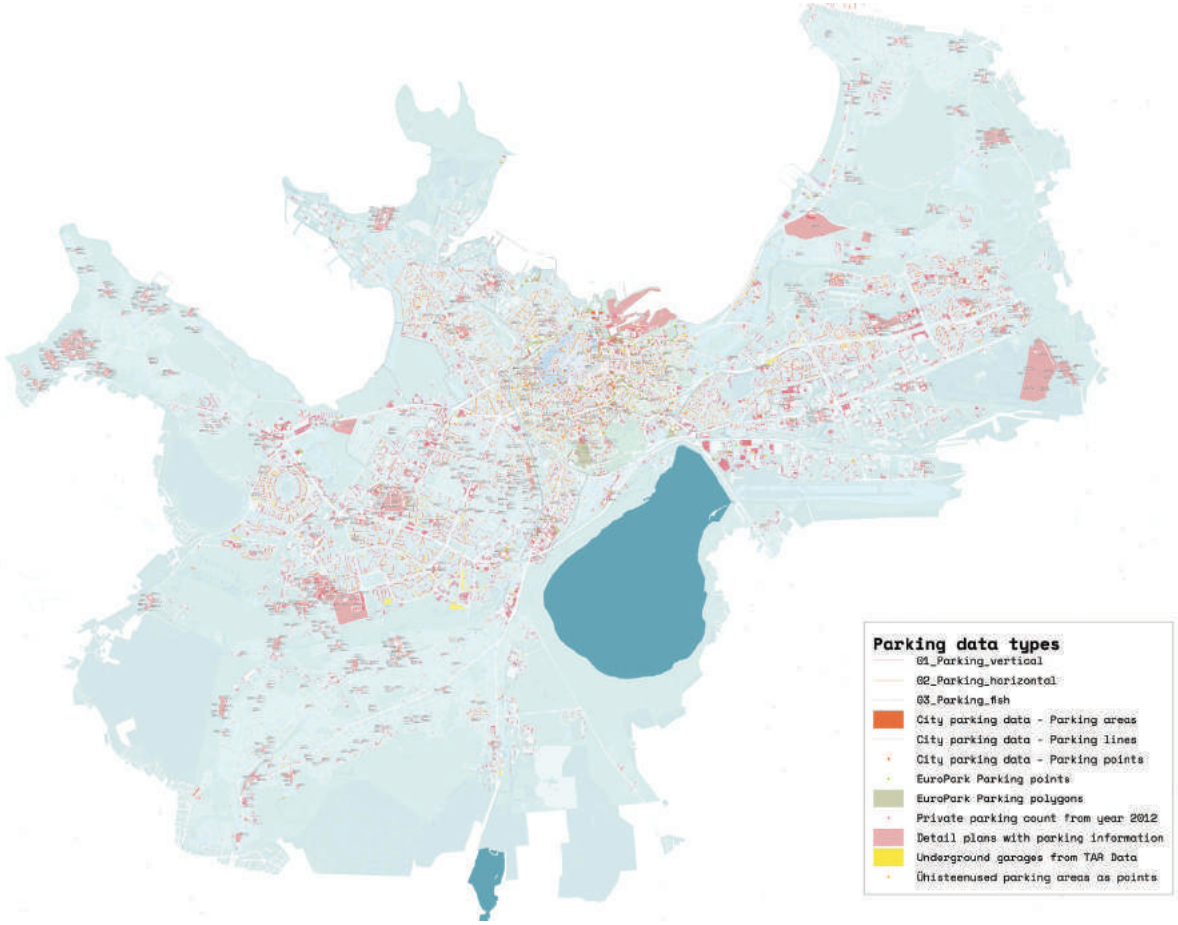


Figure 4.1

HIGH PRICE OF FREE PARKING

Despite the fact that drivers do not pay for parking in free parking lots, parking is never actually 'free'. All parking spaces, whether privately or publicly owned, involve construction, maintenance, and administrative costs. These costs are always paid for by someone and they become evident, for example, in the price of a parking space or when calculating the profitability of public buildings. The cost of paid parking is borne by drivers, but in the case of free parking, the cost is shared between all residents, whether they own a car or not.

The more 'free' parking there is, the higher the social cost of parking. For example, near various stores and businesses, where parking spaces are in high demand, there might be free parking, but the costs of construction and maintenance of such car parks are covered by raising the prices of goods and services. Thus, the price of 'free' parking is carried over to every movie ticket, cup of coffee, or bagful of groceries purchased by visitors. In the case of a free public parking lot, its design, construction, and administrative costs are borne by all taxpayers.

Professor Donald Shoup, a renowned parking policy expert, has extensively studied the relationship between parking and retailing through various case studies. According to him, paid parking actually increases sales, instead of reducing it. The reason for this is that paid parking spaces are generally fewer in number, which means that the areas freed up as a result can be turned into pleasing public spaces (e.g., by adding small design elements and greenery) and the façade of the store is more visible, which attracts more visitors. When choosing between different options for land use, cities should always prefer those that provide the greatest public benefit and improve the quality of life or offer new development opportunities.

Encouraging the proliferation of parking spaces prevents the land taken up by car parks from being used for other economically profitable activities (more profit for entrepreneurs; living spaces, jobs, and services for citizens) or for creating public recreational areas. Parking lots cause urban areas to be spread out, making distances between different destinations longer and longer. Increasing distances, in turn, lead to more car traffic and less sustainable lifestyles.

Due to the high construction costs of parking lots, providing 'free' parking to residents and visitors has become a major item of expense for real estate developers and home buyers alike. The Apartment Ownership and Apartment Associations Act, which entered into force last year, is being interpreted by developers as

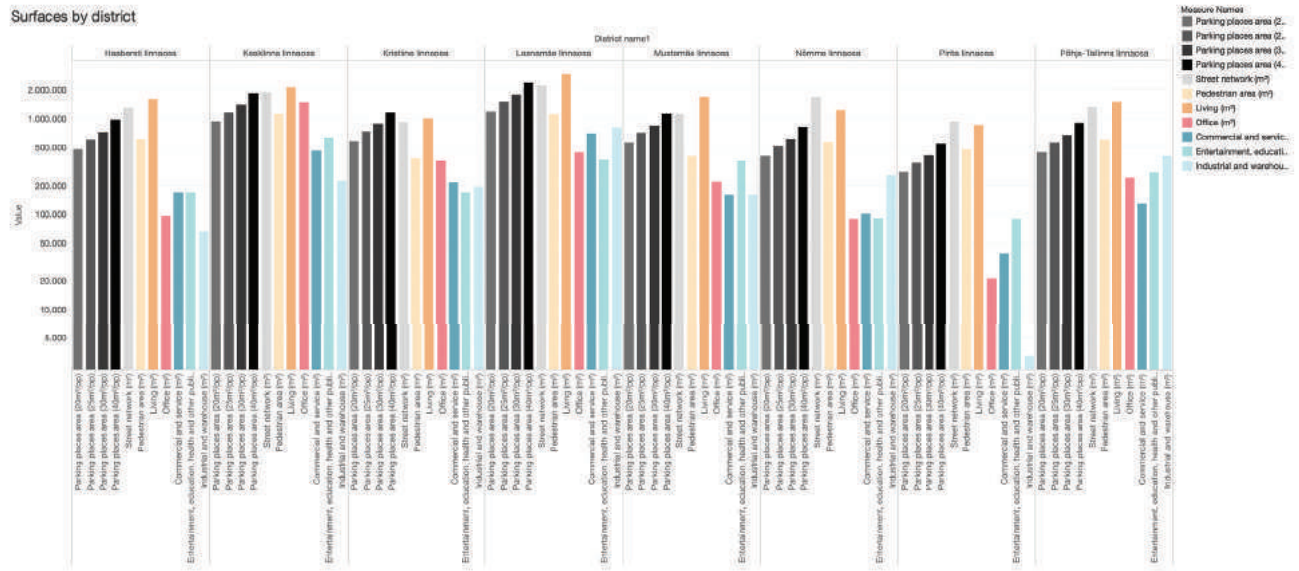


Figure 4.2

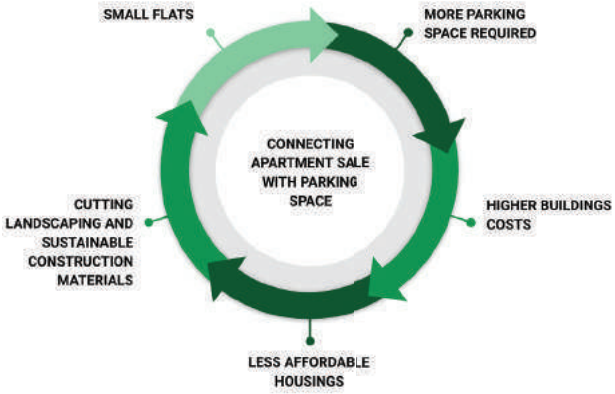


Figure 4.3

requiring that apartments and parking spaces be sold together (Pärli, 2018), as parking spaces are considered a part of the dwelling. This, however, means that parking space construction costs also have to be paid by home buyers who do not actually want a parking space and who use completely different means of transport, such as public transport.

The combined effect of the city's parking policy and the Apartment Ownership and Apartment Associations Act is likely to further increase the number of parking spaces required. The inclusion of parking space construction costs in the final price of apartments makes apartments increasingly expensive and developments increasingly complex. This, in turn, may also increase inequality within the city, as new developments are only affordable to high income earners.

Simply building smaller apartments is not a solution to the high construction costs. As the current standard sets out a required number of parking spaces per apartment, more apartments directly equates to more parking spaces. The result, again, is higher construction costs, because in a densely packed city this requires the construction of underground floors. Higher costs, in

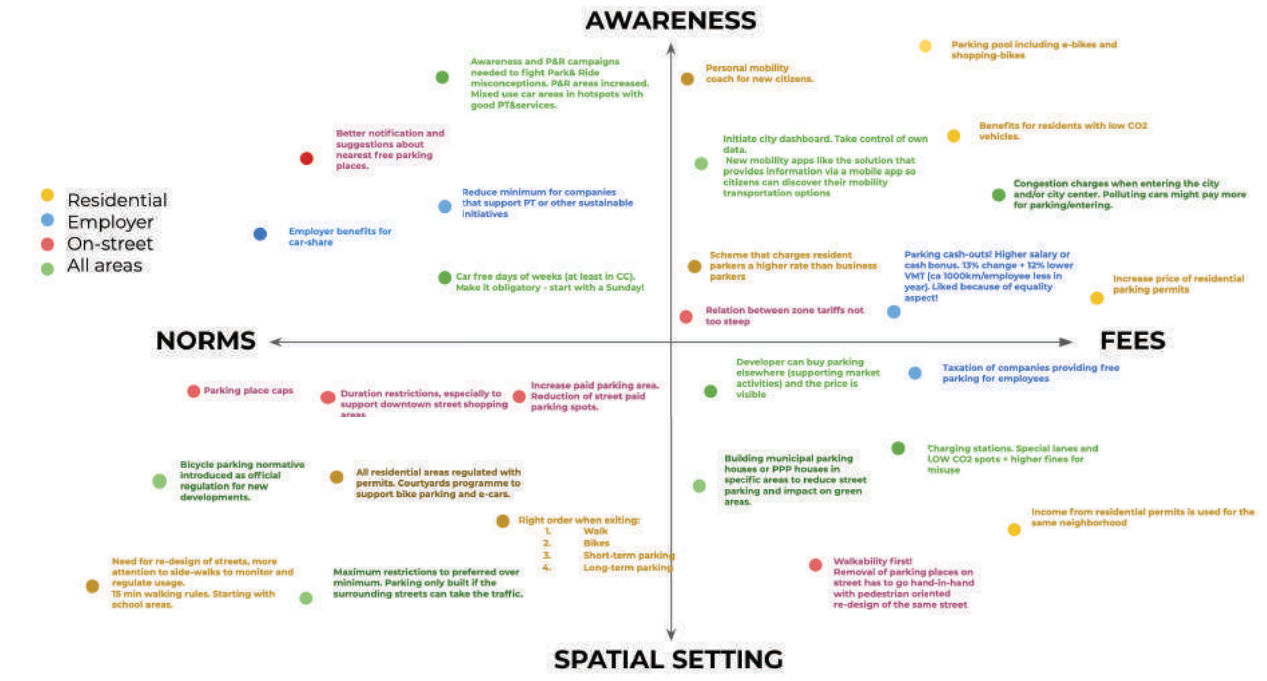


Figure 4.4

turn, force developers to look for ways to save money, by using cheaper materials and lowering the quality of outdoor areas, for example. A vicious cycle ensues, which in turn reduces the quality of the living environment and the diversity of developments.

Another undesirable consequence is the role of land covered by parking spaces in reducing the density of the urban environment, which increases the distances between homes, jobs, and various services and increases car dependency. Here, the city has the opportunity to position itself as an entrepreneurial, people-centred, and green capital by severing the links between apartment sales and parking spaces and rewriting the parking standard to call for parking spaces to be provided not in accordance with a minimum requirement, but a maximum amount, which would be based on gross area instead of the number of apartments.

ROLE MODELS IN PARKING POLICY

The parking policy study analysed the parking policies and related actions of Helsinki, Stockholm, Oslo, and Copenhagen as cities worth emulating. Parking policy can be used to make the urban environment better, more competitive, and more pleasant. Thus, parking policy becomes an instrument through which the city can demonstrate to its residents that it wishes to improve their quality of life. The aforementioned cities have committed themselves to long-term strategic actions for reducing demand for parking spaces, streamlining the parking experience, and reducing the social cost of parking while supporting the health-related behaviour of residents and local businesses. These cities have made all of their free parking areas paid in order to increase the use of public transport and reduce greenhouse gas emissions.

The biggest difference between Tallinn and the cities above is the parking space requirements for commercial buildings. In Tallinn, the minimum requirements for new developments are nearly 5 times higher than in Helsinki and almost 8 times higher than in Stockholm. This should be corrected immediately to allow for existing good public transport access (hereinafter also referred to as 'Active Mobility Area' or 'AMA') to be taken into account when establishing requirements, and current requirements should be eased at least to Helsinki's level. The construction of our residential areas should be modelled on smart solutions which allow requirements to be eased based on the objectives of the particular development project and the availability of public transport or other mobility services.

Figure 4.4 shows different parking policy options in four areas, with different actions across target groups marked in different colours. Currently, Tallinn only employs a few elements across different policy areas and target groups. Table 4.1 shows the requirements for the construction of parking spaces within detailed plans in different Nordic capitals. The numbers indicate one parking space per gross area (m^2). In the city centre of Helsinki, a maximum amount has been established instead of a minimum requirement. There is a strong emphasis on public transport and underground car parks priced by private operators. Stockholm has established a flexible standard with a variety of incentives to promote sustainability.

Table 4.1. Parking requirements in the Nordic capitals

	Tallinn	Helsinki	Stockholm	Copenhagen	Oslo
City centre	1/ 80-120	1/ 500 (max)	1/ 250-1000	1/ 143	1/ 500
Inner city	1/ 80-120	1/ 220-350 (min-max)	1/ 143-200	1/ 143	1/ 500
Sub-centres	1/ 40-60	1/ 250	n/a	1/ 43	1/ 44-143
Rail stations	1/ 40-60	1/ 75	n/a	1/ 43	1/ 55-143
Other areas	1/ 40-60	1/ 60	n/a	1/ 43	1/ 55-143

Table 4.2. Parking policy principles in Helsinki and Stockholm

	Helsinki	Stockholm
Approach	Finding a balance between the quality of the living environment and the competitiveness of businesses	Reducing parking requirements to support the development of new residential areas, and promoting sustainable mobility (bicycles, public transport, ride sharing)
Basis of parking requirements	Building right (gross area) in the detailed plan	Number of apartments according to the approved design
Pros and cons	Provides a clear basis, but can be rigid as the situation changes (delays in development plans, changes in building occupancy). Does not favour large family apartments.	Favours large family apartments, but disfavours small studio apartments. Can increase bureaucracy, as the requirements depend on the location, the detailed plan, and the final design.
Location-based differences	Helsinki is divided into three zones: I, II, and III.	The rules are generally the same throughout the city.
Basic minimum requirement	1 parking space per 100–150 m^2 gross area	0.4–0.6 parking spaces per apartment
Progressive measures	The number of parking spaces can be lower:	The number of parking spaces can be lower:
	· depending on the proximity of rail services;	· depending on the proximity of public transport and public services;
	· by adding bicycle parking spaces;	· depending on project-specific factors, such as building type, size of apartments, and multi-purpose usage of the car park;
	· in the case of the construction of state-subsidised rental premises;	· in the case of a high-quality and well-functioning mobility service package.
	· in the case of access to shared cars;	
	· in the case of multi-purpose parking facilities.	
Final requirements	For state-subsidised rental premises, the requirements can be up to 40% lower. The maximum rate of reduction for open market rental premises and privately owned projects is up to 25%.	The differences are great. Well-organised mobility services provide a 25% reduction. The requirements can be reduced to 0.23 parking spaces per apartment, sometimes even more.

PARKING POLICY RECOMMENDATIONS

Establishing an AMA or Active Mobility Area

Many European cities have a local designation for areas subject to various traffic restrictions. In Italy alone, there are 300 such limited traffic zones. In the aforementioned Nordic cities, congestion charging and the expansion of paid parking zones are becoming increasingly popular. Establishing a congestion charge applicable upon entering a certain area would encourage the residents of neighbouring municipalities to use other means of travel and the Park & Ride system. At the same time, congestion charging in no way contributes to better land use, urban space development, or the reduction of intra-city car traffic.

Here, Tallinn should refrain from blindly following other cities, and should instead seek to be an innovator and a role model for others. Our recommendation is to establish the concept of the Active Mobility Area (AMA), defined as the area with the fastest and most accessible public transport service. As high-speed public transport coverage grows in the future, so, too, will the AMA. After delineating a specific area,
the AMA concept could be used to establish a new parking standard, according to which detailed plans within the AMA would need to comply with a maximum parking space requirement instead of the current minimum requirement.

Another option would be to define the AMA on the basis of a public transport route network buffer zone. This is the case in Helsinki, where planners add parking restrictions or reduce the number of parking spaces for developments located within 400 metres of a public transport stop. This, too, is a good solution, however it only takes into account the proximity of public transport and not its efficiency and speed. The AMA should be dynamic and updated annually based on GTFS data – this would positively link the development of public transport infrastructure with urban development and support the creation of a better-connected route network instead of focusing on only two or three main corridors which could become overburdened.

Figure 4.5. Areas of new mobility services (priority development of public transport and light traffic, adaptation of parking requirements, changes in the parking system) as Tallinn becomes a multi-hub city

The AMA gives a clear shape and direction to the sustainable development of the city, which creates a snowball effect. The more efficient public transport becomes, the larger the AMA becomes. The larger the AMA, the more people are motivated to use public transport rather than personal cars, leading to less pollution and leaving more land free for green spaces. Reduced parking space requirements mean that developments located within the AMA involve lower construction costs, allowing for more investment in the indoor and outdoor areas of buildings.

Expansion of the paid parking zone

Expanding the paid parking zone as much as possible is beneficial to all citizens, who will no longer have to pay extra for the cars they store in public areas. By collecting parking fees, we can turn a place that has traditionally produced pollution and increased car usage into one

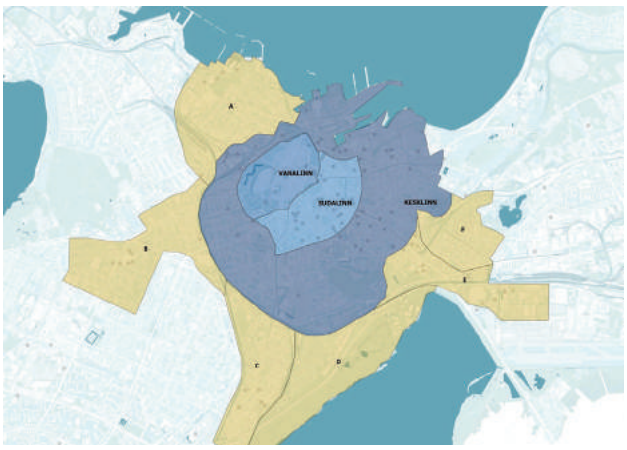


Figure 4.6. Proposal to expand dynamic paid parking on the city streets. Source: Tallinn parking policy study (SPIN Unit, 2019)

that benefits the entire community. To that end, collected parking fees should be used to improve local services. Parking planning is, after all, essentially urban planning, as parking policies relate to both transport and land use. Parking space planning that only considers land use, however, is outdated planning practice. The AMA or Active Mobility Area consists of a proposal to expand paid parking to areas where public transport services are most efficient and accessible. In order to differentiate the areas, the expansion zones are designated with the letters A, B, C, D, E, and F in different directions, but may also be referred to as a single zone during the use phase.

Local redistribution of parking revenue

For everything to function properly, not only in terms of parking, but also socially and politically, all revenue from parking fees should be allocated to the districts where the fees are collected. The funds could be used at the local level to improve public spaces, street design, landscaping, local public transport stops, pedestrian paths, cycle tracks, and municipal services – or quality of life in general. It is important to reach a common understanding or agreement between politicians and citizens on the local use of the collected parking revenue, because without this transparency, local residents are guaranteed to oppose any such changes and to see the expansion of the paid parking zone as another tax being imposed on them.

Minimum parking space requirements should be replaced with maximum permitted amounts

Reducing parking requirements and collaborating with developers will help to accelerate investment in the urban environment. Densification, filling of empty plots, and new services would benefit Tallinn by making the urban environment more diverse. The current overzealous minimum requirements for parking spaces are the main reason why parking spaces are taking up too much valuable land. The requirements have been considered necessary to satisfy the demand for parking spaces during peak hours. However, for developers, meeting these requirements means that they have to build far more parking spaces than market logic would dictate. Another requirement concerning parking spaces that wastes valuable land is the provision of free parking spaces for residents and employees.

New pricing principles for residents' parking permits

The cost of parking permits could be linked to the energy class and CO_2 emissions of each passenger car in order to implement both 'user pays' and 'polluter pays' principles and to meet the environmental and climate objectives of Estonia and Tallinn (see Estonia's Climate Policy Guidelines, the Covenant of Mayors, and the Tallinn Sustainable Energy and Climate Action Plan) – this would make the system more equitable and encourage the development of a more economical fleet of cars with a lower environmental impact. This approach would also enable the city to generate more revenue from parking permits. Meanwhile, the city could offer more affordable parking permits to owners of new electric and low-emission cars. Currently, all residents' parking permits are valid for one year and cannot be obtained for a shorter period. In their study, SPIN Unit recommends offering residents the opportunity to apply for parking permits on a one-month basis, so as to allow residents to use them only when there is an actual need. The price of parking permits should be aligned with the market price. The monthly fees for parking spaces in the city centre start at 25–40 euros, while parking spaces for new developments cost 5,000–12,000 euros. At the current rate for an annual parking permit (€120/year), instead of spending 5,000 euros on a private parking space, you could park for 42 years on the city streets. As mentioned in the introduction, even a small increase of 10% in parking permit fees could reduce car ownership by 8% (OECD, 2019). Surveys of Tallinn's residents have shown that more than 50% of car owners are willing to pay a monthly fee for a parking space near their home, provided that it improves parking space availability, reduces seasonal car storage and storage of so-called junk cars in dormitory suburbs, and leads to tidier public spaces in the dense urban environment.

The full analysis, results, and recommendations of the

parking policy study can be found at http://www.spinunit.eu/metalinn/ and https://www.tallinn.ee/est/liikuvuskava2035/

Table 4.3. Recommendations regarding the parking standard for the implementation of the 'Tallinn Public Transport+' and 'Tallinn following in Helsinki's footsteps' development scenarios

	City centre	Areas with good public transport access – AMA	Other areas
Basic requirement for apartment buildings	1/150 (0.5 parking spaces per apartment)	1/135 (parking spaces per apartment)	1/100 (0.8 parking spaces per apartment)
Small dwellings	1/135 (0.6 parking spaces per apartment)	1/100 (0.8 parking spaces per apartment)	1/80 (1.0 parking spaces per apartment)
Detached houses	--	1 parking space per apartment	2 parking spaces per apartment
Progressive measures to further reduce the number of parking spaces			
Proximity to high-speed rail transport, 600 m	--	--	-15%
Social housing	-20%	-15%	-10%
Workers' mobility package	-15%	-15%	-15%
Note! The standard sets out a maximum number of parking spaces, not a minimum.			
	City centre	Areas with good public transport access – AMA	Other areas
Institutions	1/500	1/250	1/60
Shops	1/200	1/100	1/60
Other functions	Solve individually with a focus on public transport usage and bicycle parking. All public buildings must be easily accessible by public transport and have low parking demand. Possibility for cross-usage.		
Note! The standard sets out a maximum number of parking spaces, not a minimum.			
Proximity to high-speed rail transport, 600 m	--	--	-15%
Public or cross-usage of parking facilities	-20%	-15%	-10%
Workers' mobility package	-10%	-10%	-10%
Buildings with low space usage (production building, warehouse)	-20%	-20%	-20%
Note! The standard also sets out a maximum permitted number of parking spaces, which is up to +20% of the requirements above.			

ANNEXES

ANNEXES

ANNEX I: SCENARIOS FOR THE FUTURE OF URBAN MOBILITY IN THE TALLINN REGION FOR 2035

Scenario 1. Continuing on the same course

As purchasing power and the population increase in Tallinn and Harju County, both the demand for the transport of people and goods and car ownership will increase. The increase described corresponds to the average and higher estimates used in the design of new roads. Road construction will be financed through loans and, by the end of the 2020s, rail transport will be financed from European Union funds. Car ownership will reach the so-called saturation level of European countries at around 600–700 cars per 1,000 residents. People will increasingly prefer cars, because it will be the most convenient and fastest way to travel. As purchasing power grows, people with lower incomes will also turn more towards cars, because parking is free in most areas. Despite new major city-wide road construction projects being opened every 2–4 years (Reidi tee, Tallinn Small Ring Road, Mustakivi tee thoroughfare, Tervise street connection, Rail Baltic), travel in the city will still be time-consuming, peak traffic hours will be longer, the city centre will have become less attractive, and people will be spending their weekends in shopping and entertainment centres, travelling there – with a few exceptions – by car. Housing prices in Tallinn will rise and it will be difficult for young people and the elderly to find affordable housing in attractive locations. Walking will decrease somewhat and children will be driven to school by car twice as often. Bicycle usage will double, primarily due to high congestion, unsatisfactory public transport services, and the preferences of the next generation. Although nearly half of all cars will be semi-self-driving by 2035 and there will be a wide variety of taxi services available, most families will own 1–2 cars. The generation celebrating their 60th birthday in 2020 will have reached a high age of 75 years old. Since there will be twice as many elderly people as ten years ago and they will be used to a mobile lifestyle, their mobility problems will have been solved by means of self-driving vehicle services; the number of falls on the city streets will have decreased, because travel by foot, particularly among the elderly, will have decreased in the city. New infrastructure will be financed through loans taken by the city and from the state budget. Due to demand for mobility and transport growing faster, a congestion charge will be applied in the downtown area from 2027, the proceeds from which will be used to finance new tunnels, thoroughfares, and self-driving bus services.

Scenario 2. Tallinn Public Transport+

As purchasing power and the population increase in Tallinn and Harju County, both the demand for the transport of people and goods and car ownership will increase. As the European Union will not be subsidising major road construction projects, public transport investment projects will be carried out instead: tram service at the port and Pelguranna, extension of the tram network to Lasnamäe and Mustamäe. The construction of the tram line will also involve the construction of multi-level junctions. Tallinn and Harju County will have a common ticketing system, a common route network, and common mobility services. In areas with excellent public transport access, demand for apartments will have increased, and land use will be partially regulated by the market. The millennial generation, who will have begun buying apartments by the early 2020s, will have been unable to purchase homes near the city centre due to high prices. They will have moved into apartment buildings located near train stations and tram stops and will be combining bicycle travel with trains. Inter-district public transport will be convenient and twice as fast as in 2020; there will be a common ticketing system, and new inter-district routes; convenient public transport connection points will have made using transfers and combining various mobility services more attractive. There will be quality cycle tracks and sidewalks in the immediate vicinity

of train stations and mobility hubs, which will increase the share of cyclists in traffic and will enable people of all ages to move around actively. Self-driving vehicles and on-demand buses will have a considerable share in public transport services. From time to time, this will cause uncertainty about transport prices and, like the peak traffic hours of 2020, will cause congestion and uncertainty regarding connection times. Satisfaction with public transport will have increased, but people aged 35–65 and those living in Harju County will be travelling mainly by car.

Scenario 3. Tallinn following in Helsinki's footsteps

The arrival of the millennial generation, new consumption habits and lifestyles, and limited financial and other resources will create a situation in the early 2020s where residents and businesses prefer developments located in areas where customers and workers are not dependent on personal cars. The state, the city, and the municipalities of the Tallinn region will be consciously investing in comprehensive solutions to renovate existing and develop new solutions for the living, working, and mobility environment. Depending on the situation, most people will prefer to travel by combining public transport, cycling, and rental cars, because this will be the quickest, healthiest, most convenient, and most affordable solution. Tallinn and Harju County will have a common network of public transport routes and a common ticketing system and will be acting jointly in the provision of flexible mobility services, such as bicycle and car rental, on-demand buses, and courier services. The backbone of the transport system will be a highly convenient public transport network along with a network of cycle tracks, which will be well maintained throughout the year and usable to everyone from 8 to 80 years of age. In accordance with the Covenant of Mayors and the Estonia's transport-related climate objectives, the Tallinn region in co-operation with the state will have implemented 'polluter pays' and 'user pays' principles from 2020. As a result of smart tax solutions, more than 50% of public transport costs will be financed through ticket revenue (about EUR 50 million per year) and 50% of the environmental costs of streets, parking, and cars will be financed through car usage and road transport charges (about EUR 100 million per year).

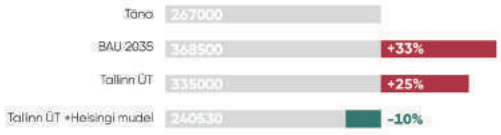


Figure 5.1. Number of passenger cars in the different mobility scenarios in 2035 in Tallinn and Harju County

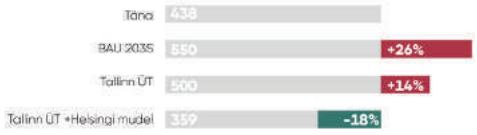


Figure 5.2. Projected car ownership rates in Tallinn and Harju County for 2035

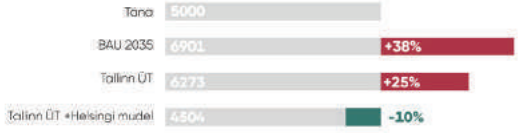


Figure 5.3. Projected mileages of vehicles in Tallinn and Harju County for 2035

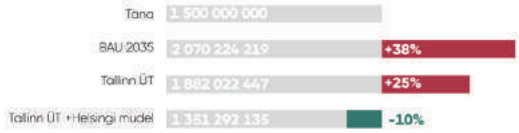


Figure 5.4. Expenses (purchase, fuel, and repair costs) related to passenger cars of residents and businesses of Tallinn and Harju County.

Tallinn Mobility Plan 2035 key metrics	2018	SAME COURSE 2035	Tallinn PT+	Tallinn following Helsinki
Population of Tallinn region	610,000	670,000	670,000	670,000
Working population	323,100	353,100	353,100	353,100
Car users among commuters	172,000	204,000	172,000	105,930
Public transport users among commuters	99,100	99,100	125,000	158,895
Homeworkers plus pedestrians and cyclists among commuters	52,000	50,000	56,100	88,275
Share of commuting by car, %	53	58	49	30
Share of commuting by public transport, %	31	28	35	45
Share of commuting by foot and bicycle	16	14	16	25
Number of passenger cars	267,000	368,500	335,000	240,530
Rate of car ownership, cars per 1,000 residents	438	550	500	359
Mileage, million vehicle kilometres	5,000	6,901	5,960	4,279
Public transport journeys in millions per year	148.6.	156.2	183.6	217
Public transport costs (based on current entry/ticket prices), €M		92	108.1	127.8
COSTS RELATED TO THE TRANSPORT SYSTEM				
Construction of new roads, multi-level junctions, €M per year	80	120	80	30
of which Tallinn	40	80	40	15
of which the state	40	40	40	15
Road maintenance and repair	80	120	100	120
of which Harju County municipalities	25	30	30	30
of which Tallinn	40	40	40	60
of which the state for Harju County roads	40	60	40	60
New public transport infrastructure, €M	2	10	30	30
New trains (average annual cost over 30 years), €M		1.7	3.3	3.3
Investments in cycle tracks and bike sharing, €M	2	3	5	10
Public transport connection points and public space, €M	1	3	10	10
Calming of traffic, redistribution of street space, €M	1	2	5	15

Tallinn Mobility Plan 2035 key metrics	2018	SAME COURSE 2035	Tallinn PT+	Tallinn following Helsinki
PUBLIC TRANSPORT OPERATING COSTS				
Tallinn	70	80	80	80
Elron	15	17	20	25
Harju County routes	7	9	15	15
Harju County municipalities' contribution to public transport costs, €M	2	3	15	15
CO_2 emissions penalties (€50/t), €M	0	20	7	-8
Total public sector expenditure, €M	283	395.7	378.3	368.3
of which Tallinn	152	219.7	213.3	223.3
of which Harju County municipalities	27	33	45	45
of which the state	102	126	115	115
PUBLIC SECTOR REVENUES, €M				
Revenue from public transport tickets, €M	12	17.5	59	65
Tallinn, €M	4	6	40	40
Elron, €M	5	7.5	10	12
Harju County routes, €M	3	4	8	8
Revenue from bike sharing, €M			1	5
Revenue from parking fees on city streets	6	9	9	20
Annual parking space fee	0	0		10
Rush hour fee, clean air zone fee	0	10	20	40
Building right infrastructure charge		5	10	20
Revenue from CO_2 fees, €M		0	0	39
Revenue from sales of CO_2 allowances, €M		0	0	8
Fuel excise duty for transport in the region	250	260	215	98
Total public sector expenditure, €M	268	301.5	313	299
Spending on passenger cars by residents and businesses, €M (€0.3/km)	1,500	2,070	1,788	1,284
Number of additional parking spaces (2 spaces per reg. car)		203,000	136,000	-52,940
Area of additional parking spaces, m^2		3,654,000	2,448,000	-952,920
Cost of constructing the additional parking spaces (average 3,000), annual average over 15 years, €M		41	27	

Tallinn Mobility Plan 2035 key metrics	2018	SAME COURSE 2035	Tallinn PT+	Tallinn following Helsinki
Total cost to society, €M	1,783	2,547	2,221	1,652
ENVIRONMENTAL IMPACTS				
CO_2 from passenger cars, tonnes	800,000	759,082	536,376	299,536
CO_2 from trucks, tonnes	600,000	570,000	540,000	480,000
Total CO_2 emissions for Tallinn + Harju County (provisional!), tonnes	1,400,000	1,329,082	1,076,376	779,536
Difference between CO_2 emissions and target (max 930,000 t/y)		399,082	146,376	-150,464
External cost of CO_2 emissions €50/tonne)	70	66.5	53.8	39
External cost of noise, €M/y	47.5	65.6	56.6	40.7
Total public sector expenditure on mobility	283	395.7	378.3	368.3
Total public sector revenue from transport taxes and fees	268	301.5	313	299
Spending on passenger cars by residents and businesses, €M (€0.3/km)	1,500	2,070	1,788	1,284
Total direct mobility-related costs	1,783	2,465.9	2,166.3	1,652.1

Table 3.2. Average number of monthly users of public transport period cards in Tallinn and Harju County.

Source: Tallinn Transport Department

ANNEX II: common mobility of the Tallinn and Helsinki capital regions

Cross-border co-operation between Tallinn and Helsinki in the field of mobility and transport management will boost communication between the neighbouring capitals and support the functioning of the economic centres of both countries. At present, the daily shipping and economic activities of the two cities have a major impact on each other's urban traffic. As such, the Tallinn Mobility Plan addresses opportunities for co-operation with the City of Helsinki to reduce the impact of congestion and improve the mobility of visitors through a common system of public transport.

Management of public transport and mobility in the capital region

The City of Tallinn and the Ministry of Economic Affairs and Communications have decided to follow the example of the municipalities of the Helsinki region in the management of public transport. To this end, a memorandum setting out common interests, similar to the co-operation agreement concluded between the Finnish capital and the surrounding municipalities, will be drawn up with the aim of planning the living environment in consideration of societal needs and climate change and ensuring

good connectedness throughout the region in order to create a competitive edge for economic development and better quality of life. The shared vision of the Tallinn City Government and the Ministry of Economic Affairs and Communications is to create a CO_2-neutral and green urban area where there is less forced travel and dependence on personal cars. Both schoolchildren and the elderly must be able to move independently, comfortably, and safely. Municipalities in the capital region will work together in managing mobility, so that people would no longer perceive differences in how mobility is managed in different municipalities and so that all means of travel would be easily accessible to them throughout the region.

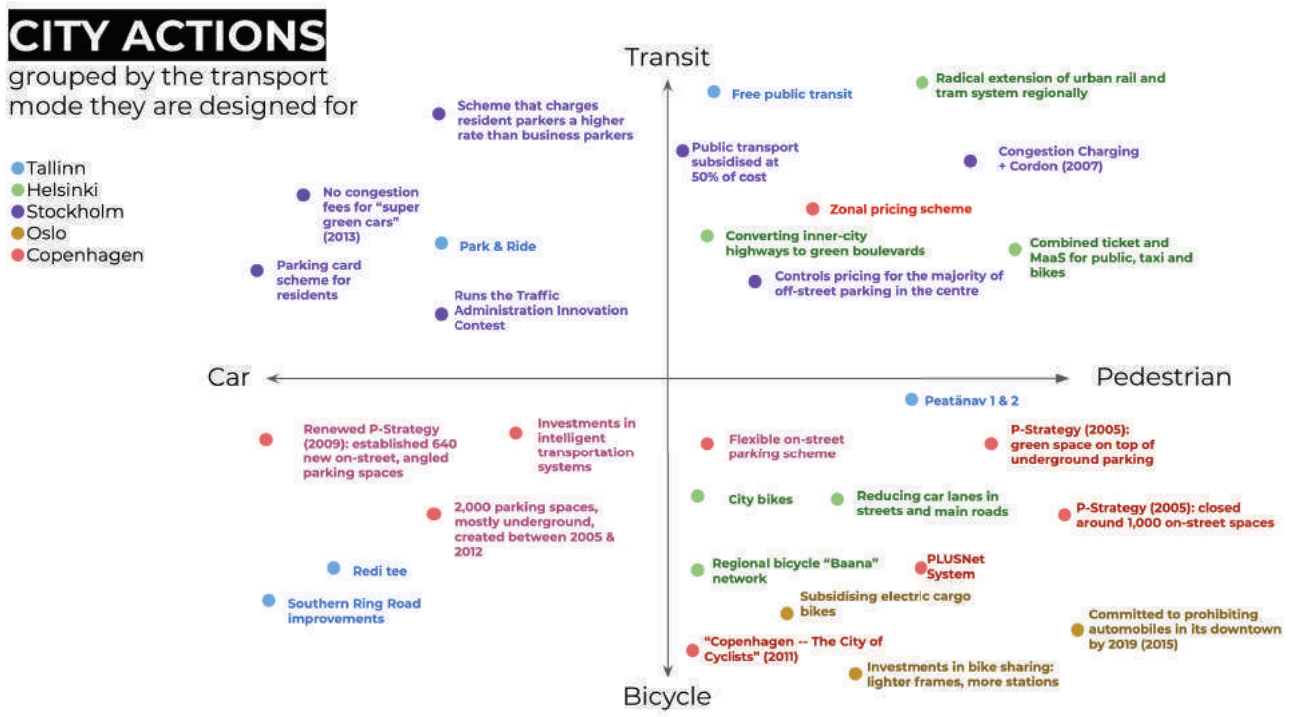
The Memorandum of Co-operation aims to establish a common public transport area in Tallinn and Harju County, similarly to Helsinki, and to establish a common zone-based ticketing system for all types of public transport. In order to achieve efficient mobility management in Tallinn and Harju County, a common network of public transport routes needs to be created that will promote multimodality (i.e. the combining of multiple means of transport), increase public transport usage, reduce infrastructure maintenance costs, reduce journey distances and times, but also increase energy efficiency and reduce negative environmental impacts.

The practical result of the cross-border co-operation between Tallinn and Helsinki will be a common public transport ticketing system that will enable travellers to use public transport in both countries. The capitals of Estonia and Finland are exploring possible ways to pay for the public transport tickets both by mobile phone and QR code sharing.

Helsinki's urban traffic planning principles regarding the planning of land use, settlement, and mobility management (LSM), which are aimed at increasing public transport usage.

Implementation of the principles behind Helsinki's parking policy in Tallinn as per the parking policy study carried out within the framework of the Mobility Plan.

Impact of the ports of Tallinn and Helsinki on traffic in the cities – measures for controlling and steering ship-related traffic growth (truck tax).



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