

Urban Mobility & TEN-T Readiness: Key Insights from the Baltic Sea Region

Online | March 11th 2026

<https://interreg-baltic.eu/project/bsr-urban-mobility/>

<https://interreg-baltic.eu/project/sumpsforbsr/>

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PROJECT PLATFORMS

BSR Urban Mobility

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SMART GREEN MOBILITY

SUMPs for BSR





Agenda

1. Introduction
2. Key findings from survey to national SUMP
Contact points
3. Key findings from BSR Urban Mobility
4. Conclusions
5. Discussion

Why these surveys?

- The knowledge on SUMP's is more relevant than ever due to the revised TEN-T regulation.
- SUMP's for BSR & BSR Urban Mobility projects cooperate on studying the state of the art of Sustainable urban mobility and logistics planning & TEN-T regulation implementation in the Baltic Sea region.

→ **Survey results feed into planning peer learning and capacity building activities in BSR Urban Mobility**

Baltic Sea region urban nodes:

Estonia: 2

Denmark: 4

Finland: 7

Germany: 8 (only BSR nodes)

Latvia: 1

Lithuania: 5

Poland: 30

Sweden: 18

Two surveys

Questionnaire to the National SUMP Contact Points

Target group: National SUMP contact points

Number of responses: 6

Duration: October 23rd 2025- January 9th 2026

Topics covered:

- National legislative frameworks for SUMP
- Current status of SUMP development
- SUMP support offered for cities
- Main challenges in SUMP development & needs for support

Survey on Sustainable Urban Mobility in the Baltic Sea region

Target group: Local and regional authorities (urban nodes)

Number of responses: 86

Duration: December 5th 2025- February 13th 2026

Topics covered:

- Implementation of SUMP & SULP
- Awareness and readiness of TEN-T regulation
- Specific topics: active modes; mobility & logistics hubs, monitoring and evaluation

BSR Urban Mobility

Enhancing active and efficient urban mobility in the Baltic Sea region

We bring together **tools, guidance, and demonstrated solutions from 17 projects** that help to tackle urban mobility challenges and consolidates the knowledge into:

- **State of the art report** on sustainable urban mobility and logistics planning in the Baltic Sea region
- **Peer learning and capacity building activities** for mobility planners and experts
- **BSR Urban Mobility Policy Framework** for enhancing active and efficient urban mobility in the BSR

7/2025 – 6/2028
#MadeWithInterreg



The BSR Urban Mobility project platform connects cities, regions, and policymakers in a peer learning network to support the implementation of sustainable urban mobility plans in Baltic Sea region cities and urban nodes.

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BSR Urban Mobility

SUMPs for BSR

Enhancing effective Sustainable Urban Mobility Planning for supporting active mobility in BSR cities

The project helps smaller cities apply sustainable urban mobility planning (SUMP) to encourage shift towards active mobility and thus, a healthier lifestyle and reduction of traffic emissions at the same time.

- **5-module online training programme on SUMP** designed for the mobility planners and experts in the **small and mid-sized cities**.
- webinars, workshops, and independent learning materials offering a combination of **practical tools, peer learning, and expert insights**.
- all training materials & recordings will be available at the Baltic Sea region SUMP Competence centre

11/2023 – 10/2026

#MadeWithInterreg #SUMPsforBSR



Lead Partner: City of Turku/UBC Sustainable Cities Commission

Partners: University of Gdansk, Institute of Baltic Studies, Cesis municipality, City of Gdynia, University and Hanseatic City of Greifswald, Gävle municipality, Panevezys city municipality

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SUMPs for BSR



#SUMPsforsBSR

Results of the questionnaire to the National SUMP Contact Points | 11.3.2026

SUMPs for BSR project, co-funded by the Interreg BSR programme, is supporting transition to sustainable urban mobility planning.

Maarja Käger
Institute of Baltic Studies (IBS)

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SUMPs for BSR



Current status of SUMP development

Based on responses from Estonia, Finland, Germany, Lithuania, Poland & Sweden

Summing up:

- Most countries do not have a national legislative framework requiring cities to adopt SUMP
- However, national guidelines & recommendations, and voluntary adoption are common, with only Poland developing a legislative framework
- While some countries report widespread adoption of SUMP among the larger urban node cities, smaller municipalities often lag behind

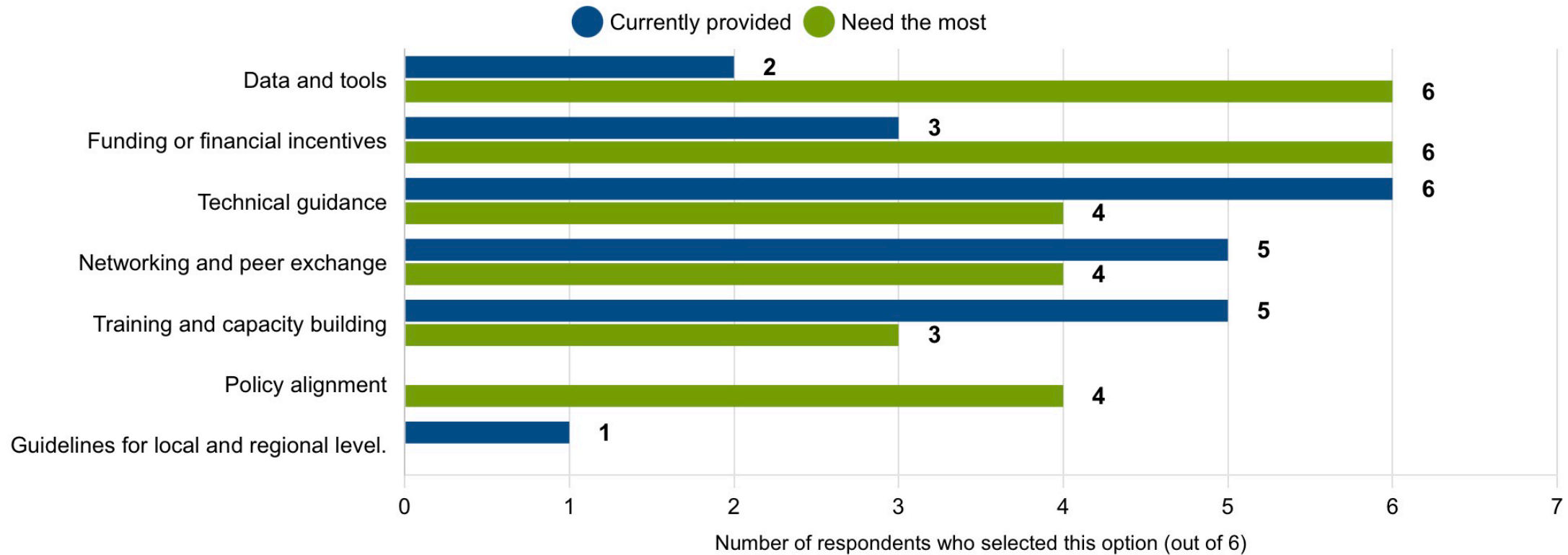
Some remarks:

- Mobility topics could be covered in climate and energy plans, master plans etc.
- Many have SUMP, but alignment with the Annex V of the TEN-T regulation varies

“A survey from 2019 gave the result that 90 of Sweden’s 290 municipalities had some form of a SUMP”

Poland: “30 urban nodes – 27 with SUMP (2 in preparation). Total cities with SUMP nationwide: 49.”

What kind of support is currently provided vs needed by cities



Support providers: ministry or national government, national transport agency, NGOs or research institutions, Centre for EU Transport Projects CEUPT (Poland), regional authorities + national (digital) platforms or competence centres or guidelines related to SUMP

Trainings provided: JASPERS training for the member states, network for the urban nodes, different EU projects

Main challenges cities face in developing and implementing SUMP

- Human, technological, and financial resources, also to implement SUMP
 - Low public engagement in participatory processes and insufficient budgets for participation
- Relating SUMP with overall governance and planning
- How to govern SUMP that cover more than one municipality? Cooperation models, legal context, funding, decision making
- How to promote the need for a SUMP to wider audiences, incl. policy makers – measuring and explaining outcomes, confrontation between different mobility modes and use of street space
- Limited, unsystematic monitoring of SUMP and a lack of reliable data

Topics that should be prioritized to support cities in developing and implementing SUMP

- How to „sell“ the need for a SUMP
- Funding or financial incentives, incl. how to finance the implementation of SUMP continuously
- Technical guidance in regional context, incl. guidelines, criteria, cost-benefit analysis of measures
- Developing a common methodology for data collection; data sources and platforms
- Monitoring of SUMP
- Public and stakeholder participation
- Forms of cooperation within FUA

“Sharing experiences and best practices (incl. mobility planning methodologies, data systems, UMI, fulfilling the requirements of the TEN-T Regulation) across city and national borders, having joint pilots”

Maarja Käger, maarja@ibs.ee

Institute of Baltic Studies (IBS)

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Thank you!

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BSR Urban Mobility

Survey on Sustainable Urban Mobility in the Baltic Sea region

Webinar 11.03.26

Anne Põder, Tallinn University of Technology

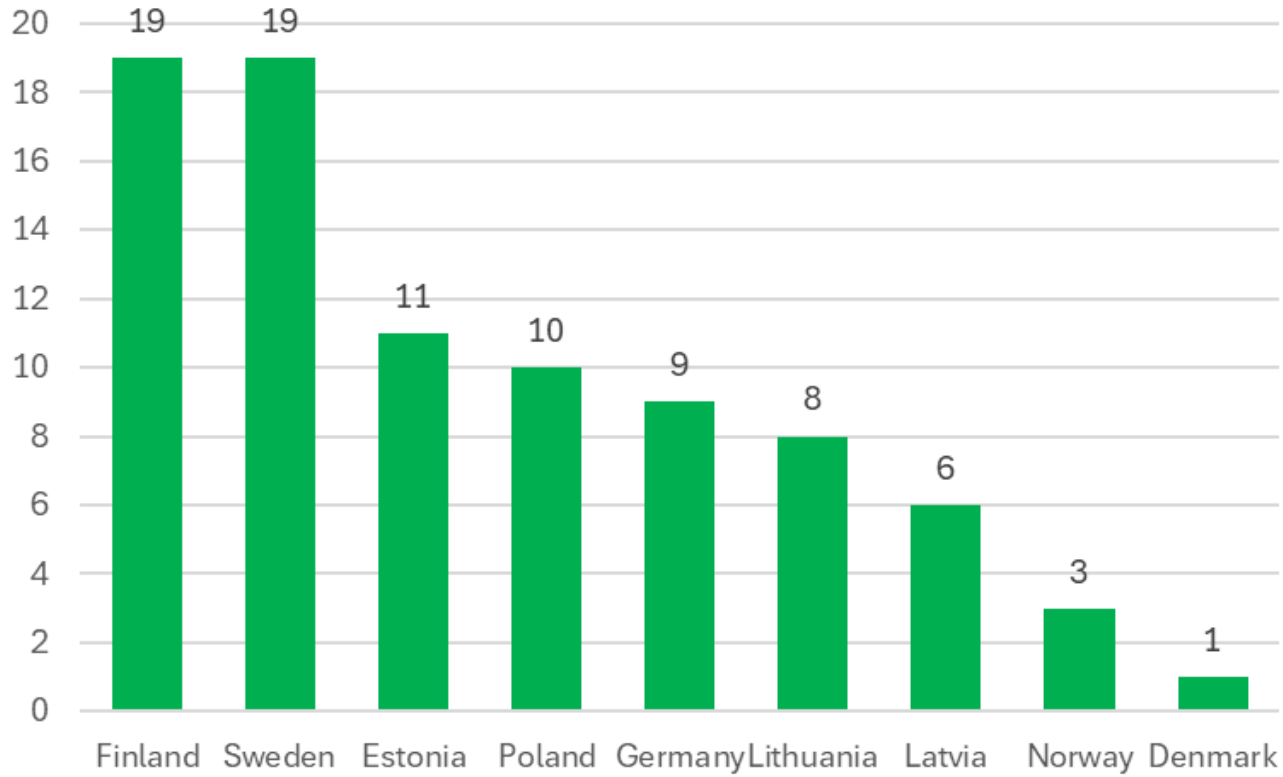
<https://interreg-baltic.eu/project/bsr-urban-mobility/>



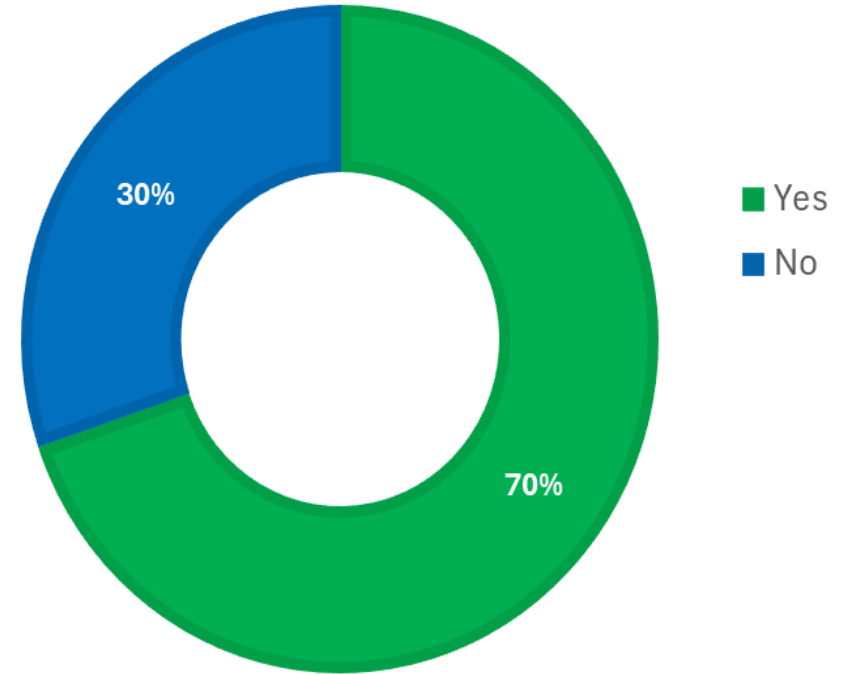
Survey responses

86 responses in total

RESPONSES BY COUNTRIES (N)

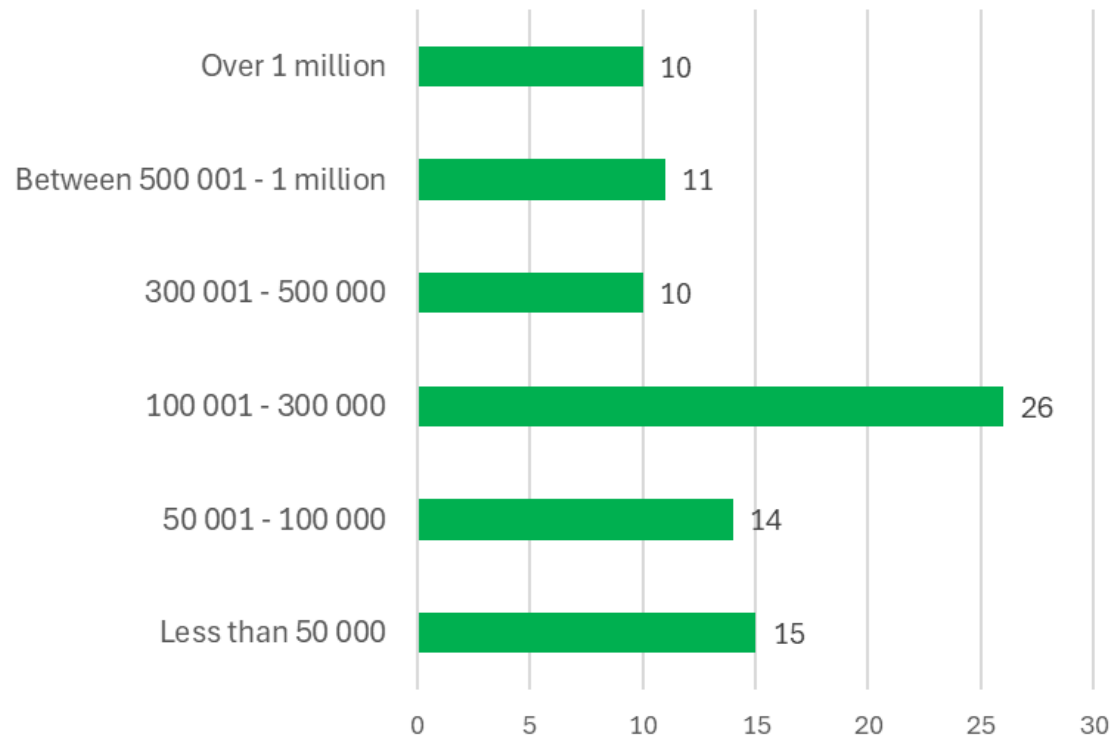


IS THE CITY OR REGION LISTED AS AN URBAN NODE OR PART OF AN URBAN NODE (%)

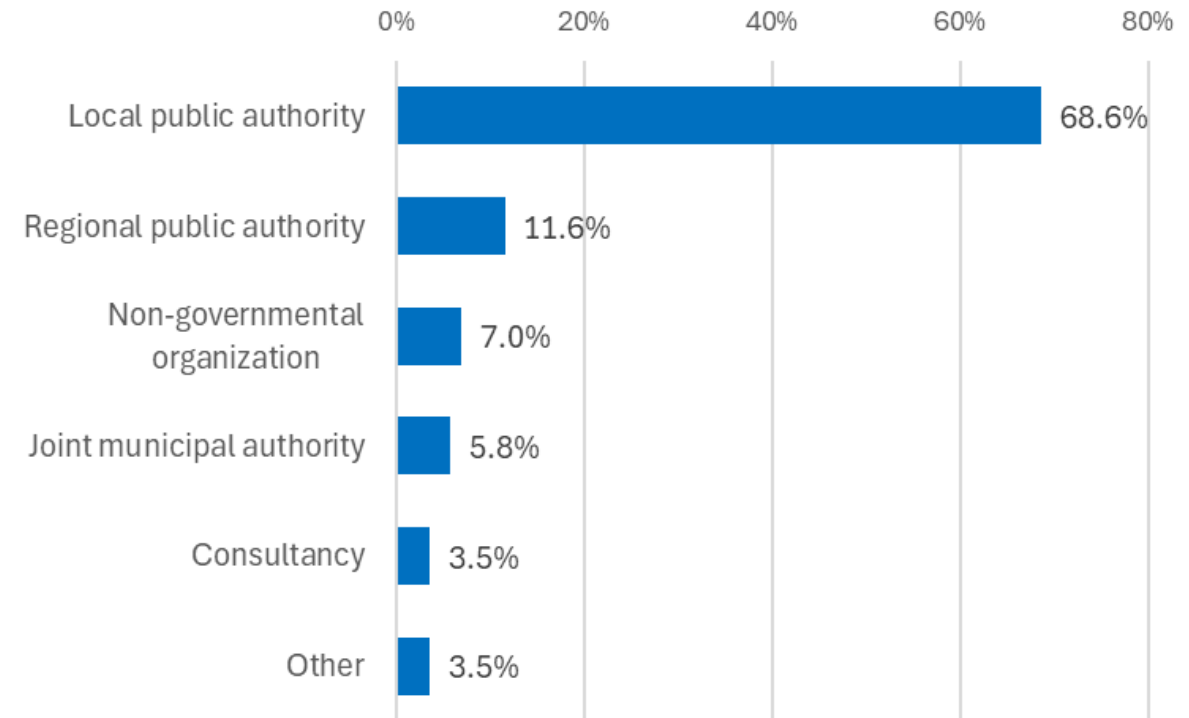


Survey responses (II)

RESPONDING CITIES/REGIONS BY NUMBER OF INHABITANTS (N)

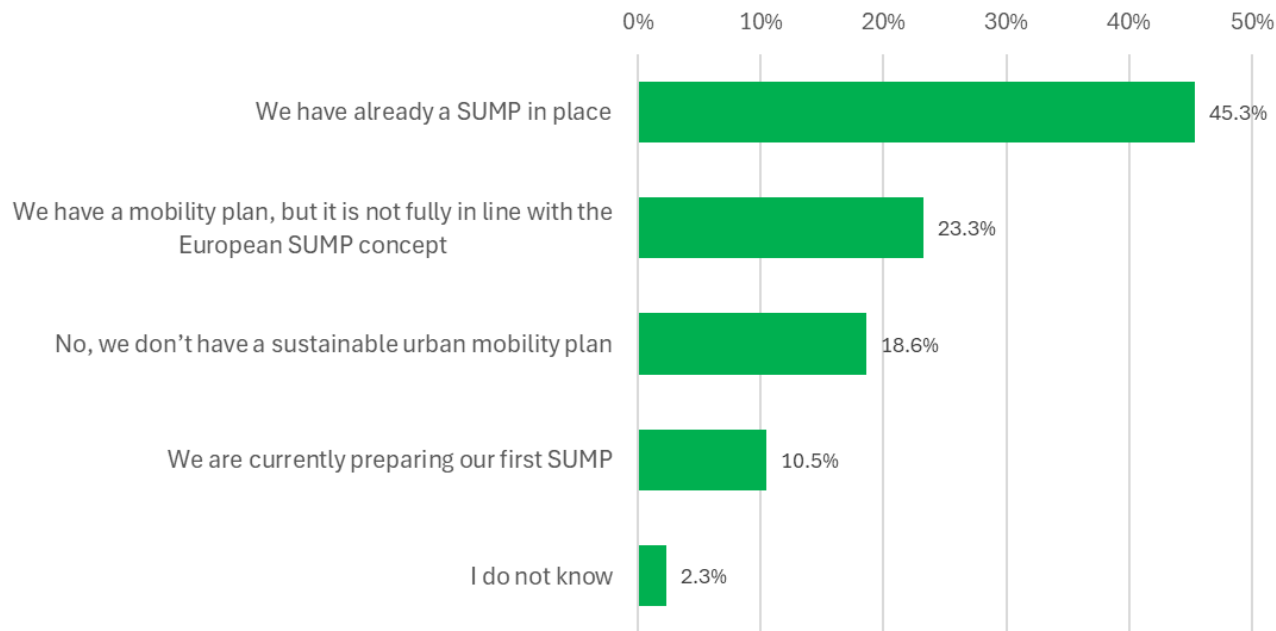


RESPONSES BY TYPE OF ORGANIZATION (%)

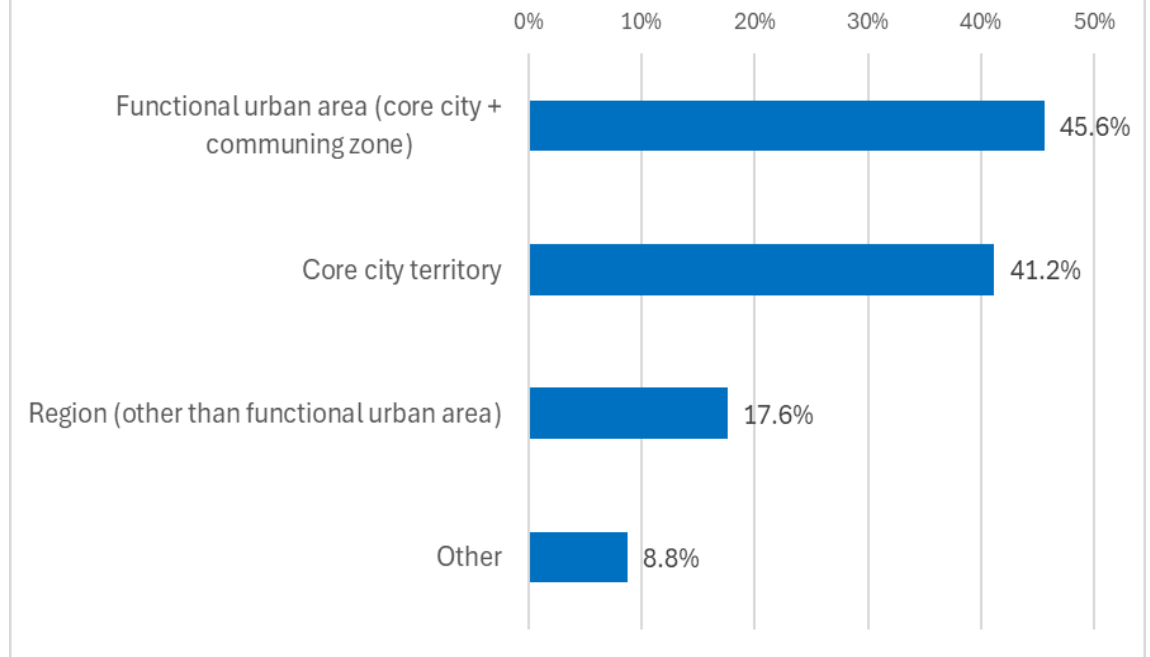


Sustainable urban mobility planning (II)

SUSTAINABLE URBAN MOBILITY PLAN IN MUNICIPALITY/REGION (%)



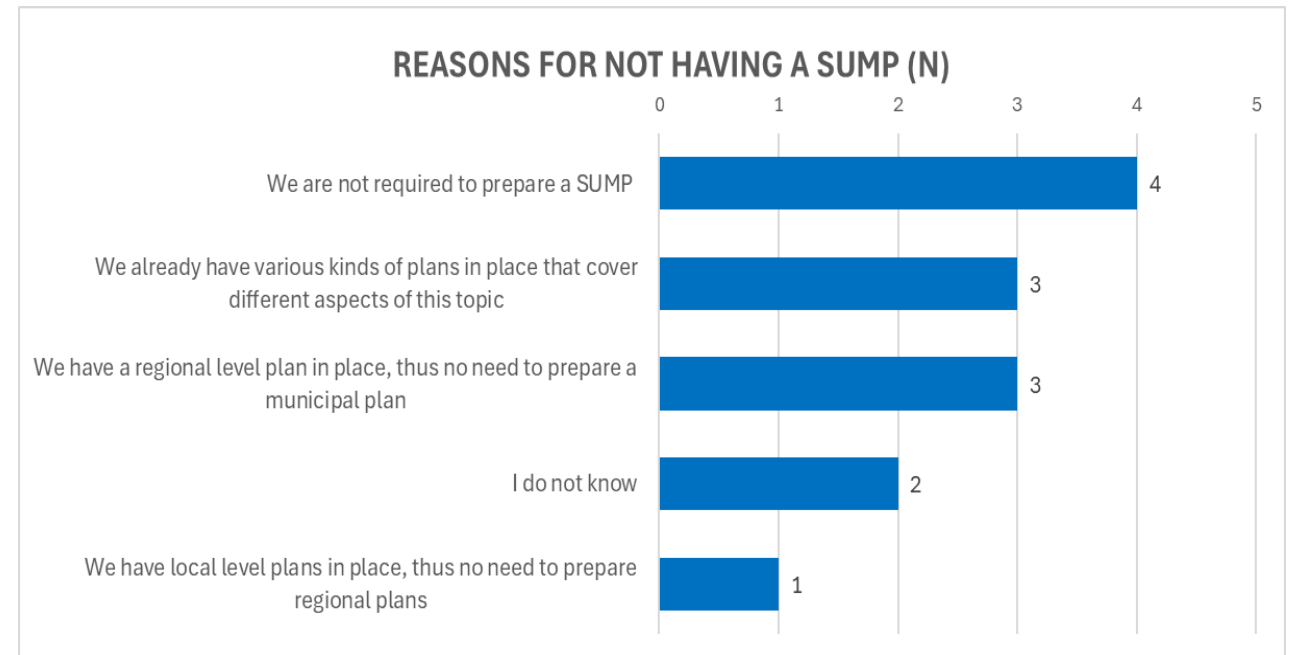
TERRITORY COVERED BY MOBILITY PLAN (%)



Sustainable urban mobility planning (III)

Who does not have plans?

- 16 responses, mostly the smallest authorities (14 responses from cities/regions with less than 100 000 inhabitants)
- 7 plan to prepare one by end of 2027



Sustainable urban mobility planning (IV)

Examples of issues

„Financial“

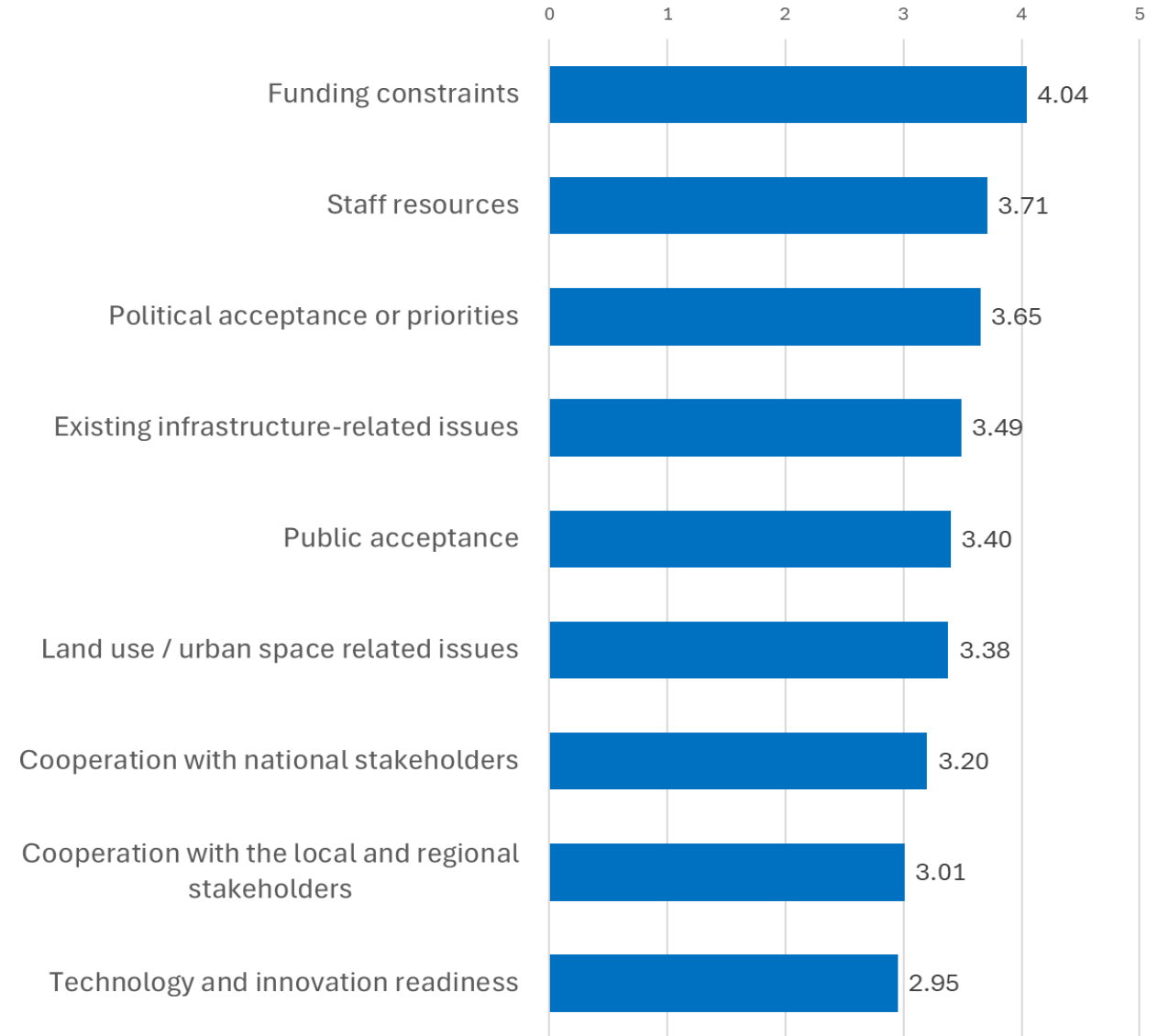
„Planning process are long and complicated, resulting in high-cost project which take long time to implement and to be finished“.

„City has ambitious mobility goals that are not reflected in the policies of the surrounding municipalities, which make it difficult to create an effective SUMP for the whole region.“

„Own money resources and ... a constant up & downs due to political changes.“

„Political short-termism in prioritizing projects whose implementation spans decades.“

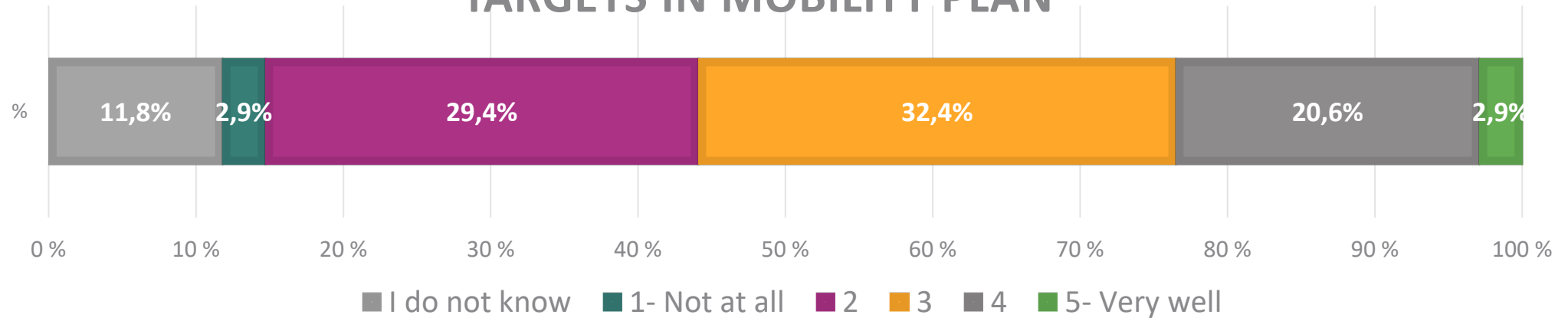
CHALLENGES IN IMPLEMENTING SUSTAINABLE MOBILITY (MEAN*)



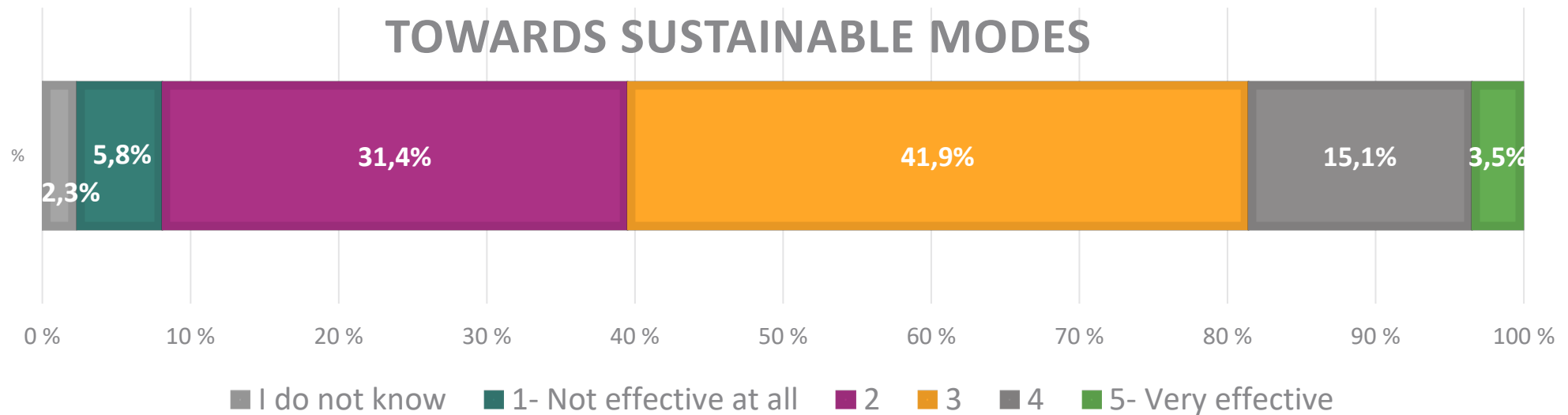
* Scale: 1- Not challenging at all ... 5- Very challenging

Sustainable urban mobility planning (V)

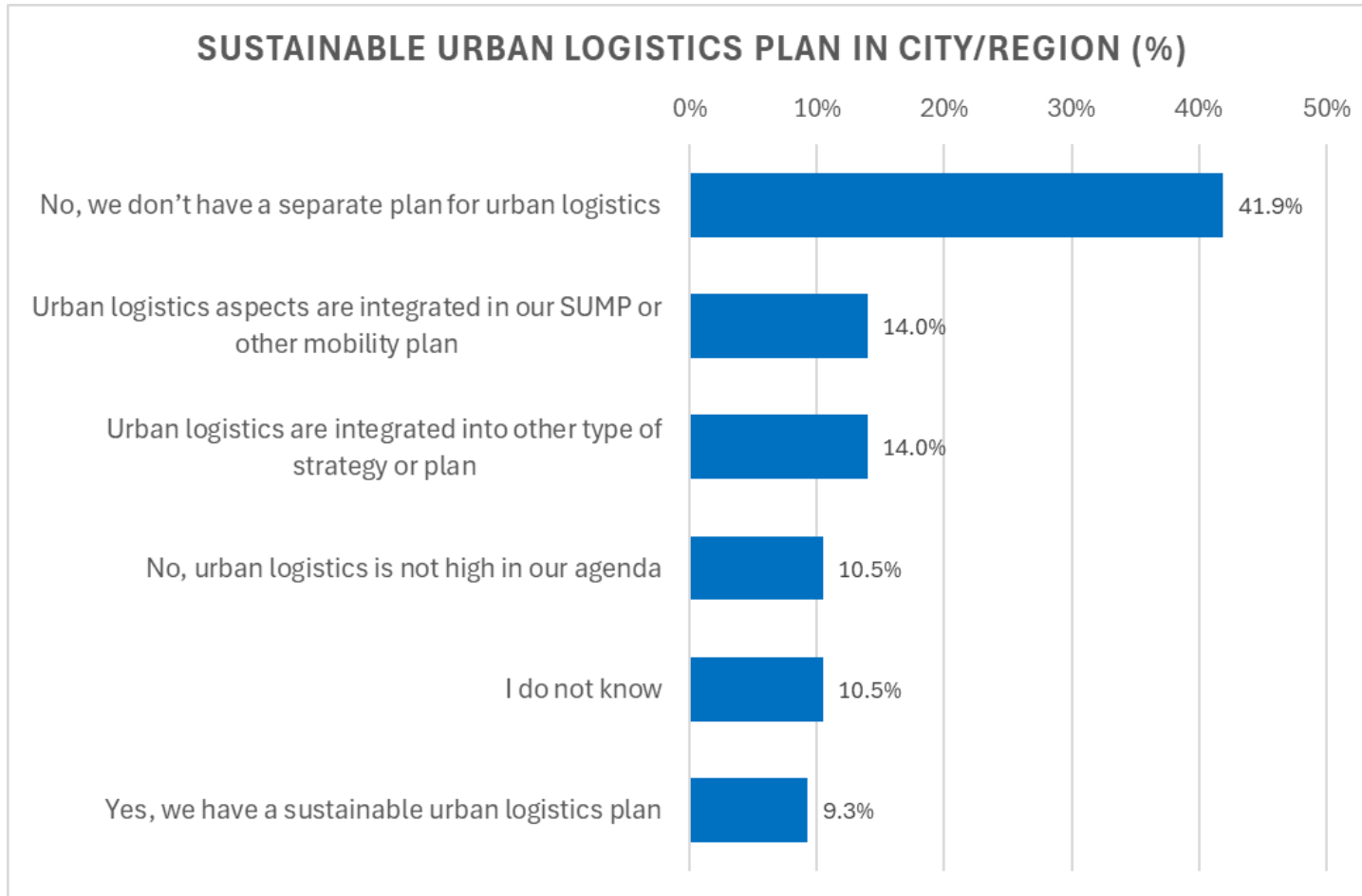
HOW WELL THE CURRENT MODAL SPLIT REFLECT THE TARGETS IN MOBILITY PLAN



EFFECTIVENESS OF CURRENT PLANNING IN SHIFTING TOWARDS SUSTAINABLE MODES



Sustainable urban logistics plans (SULP)



Examples of issues

„Evaluation/data“.

„A big challenge when it comes to logistics is that lack of information. We know a lot about how people move but need to build a solid base about logistics too.“

„It takes long to work on mobility hubs / to make last mile logistics happen, we have tons of experience but to continue that process is so exhausting (no extra staff!)“.

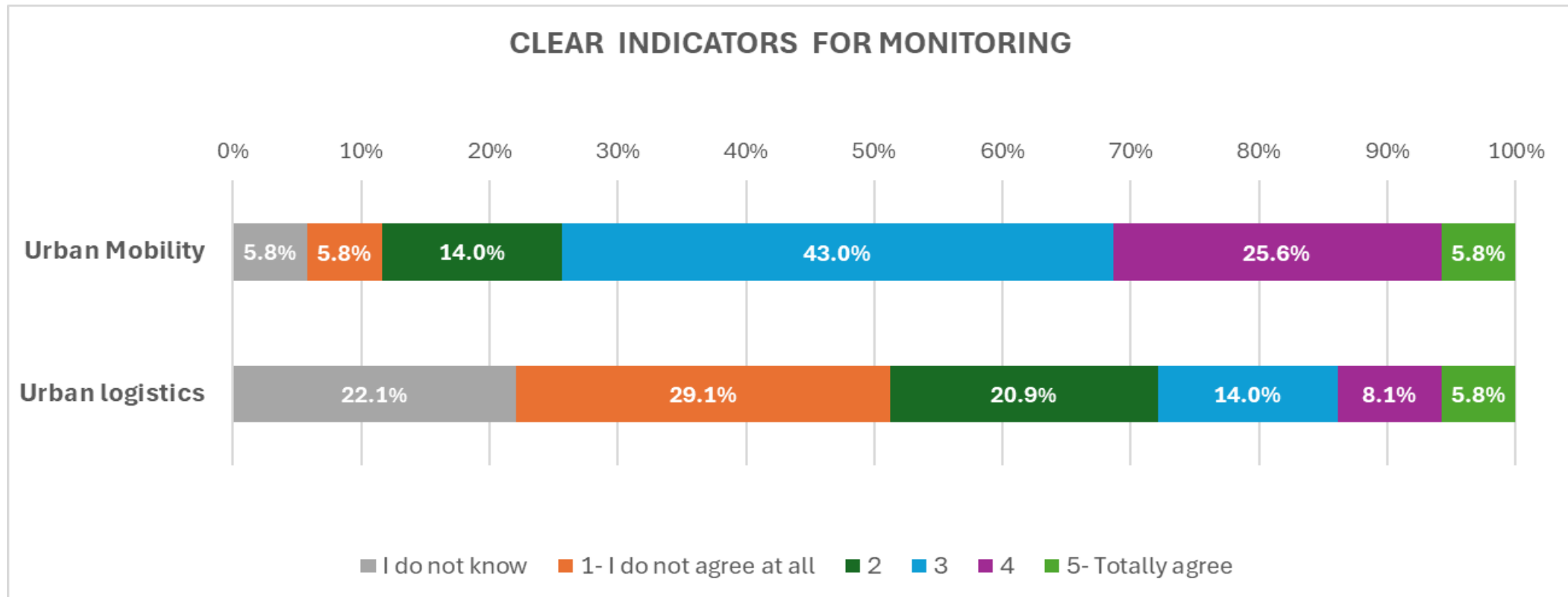
Monitoring & evaluation

SUMPs:

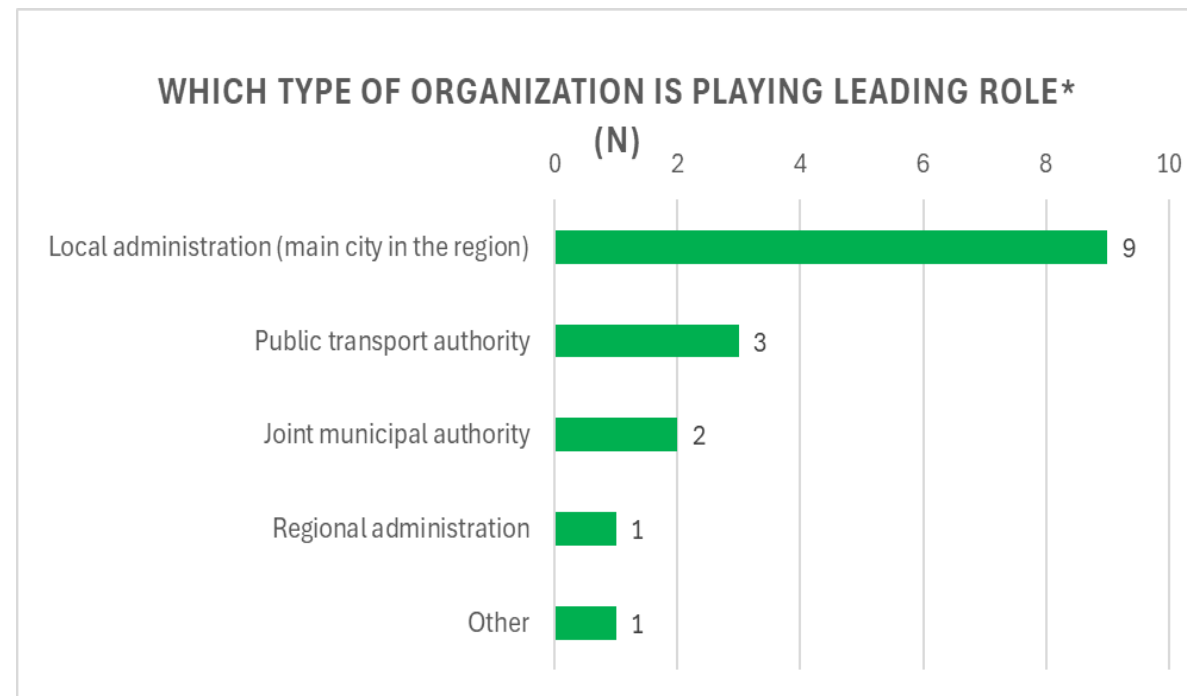
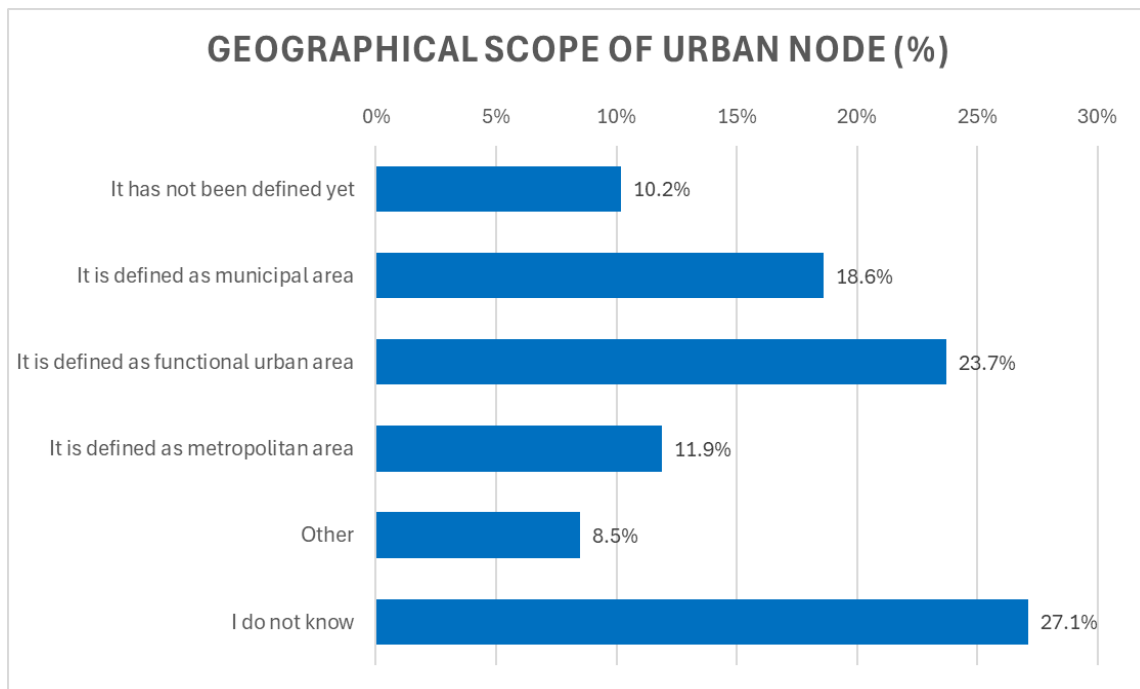
24% has a well defined framework, 59% preliminary framework

SULPs:

12% has a well defined framework, 50% preliminary framework

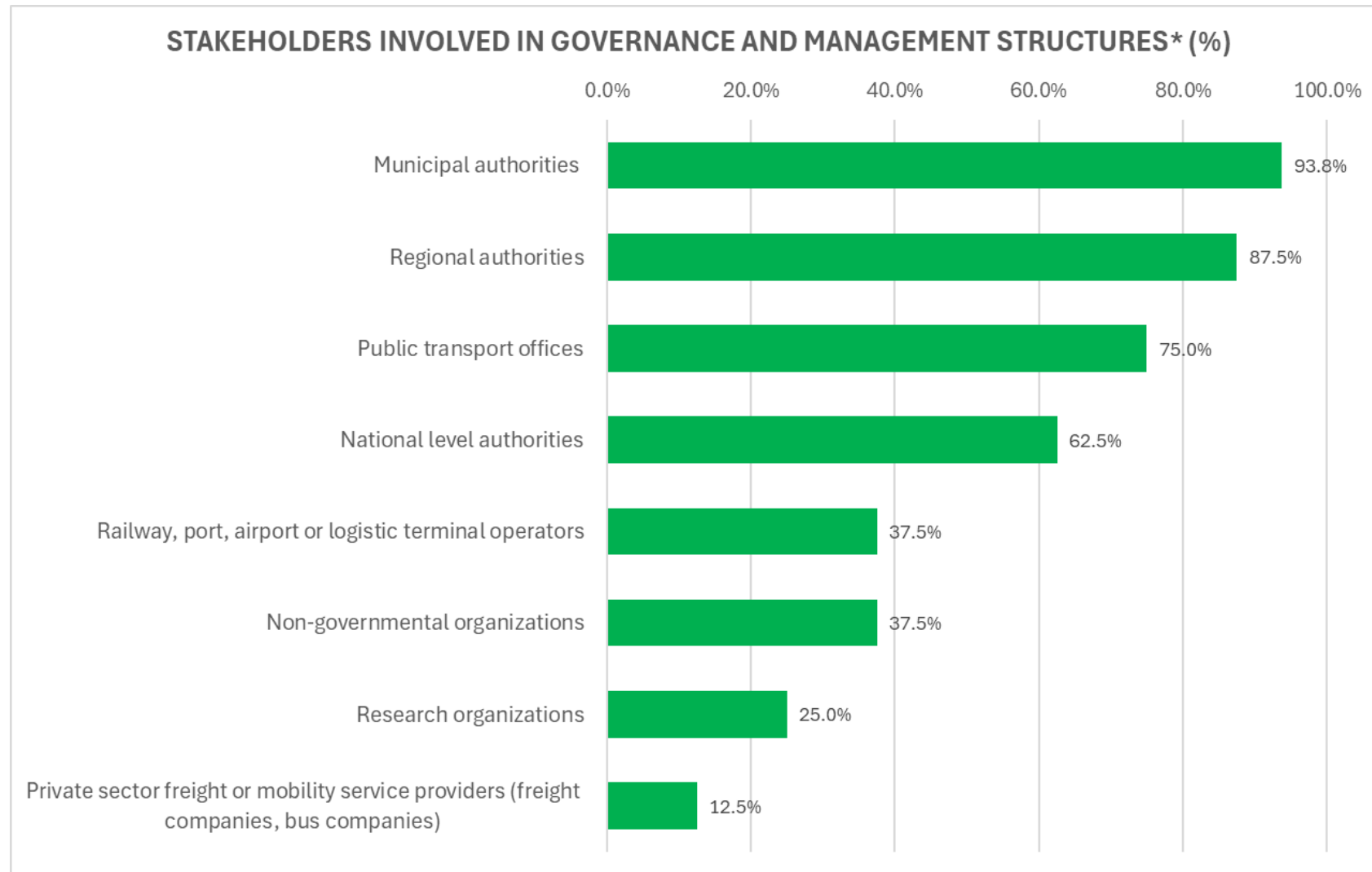


TEN-T regulation (urban nodes)



Are management structures and procedures specified: ***YES 27%; NO 27% ; Do not know 46%**

Governance of urban nodes

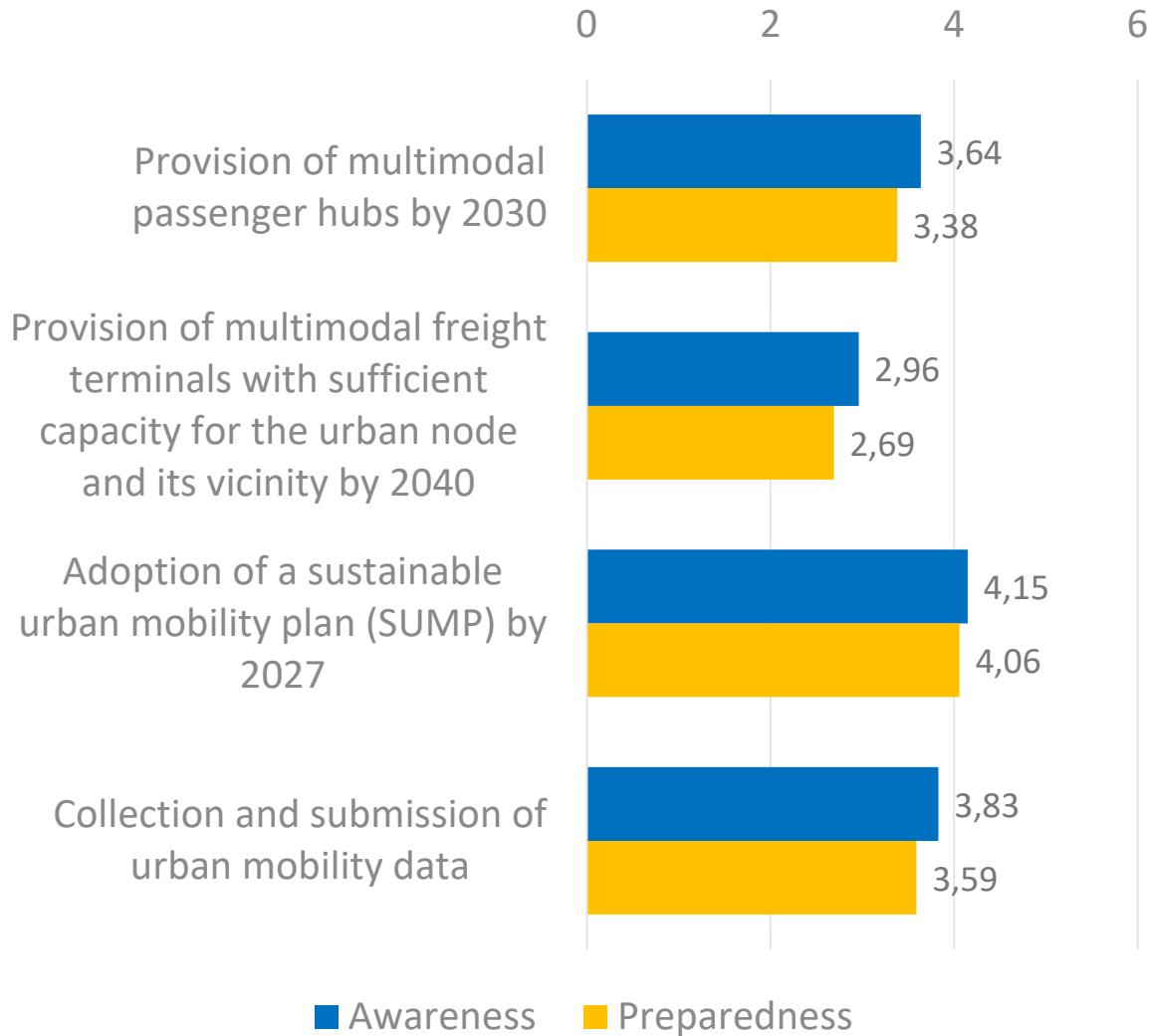


* Share among those who answered that management structures and procedures have been specified

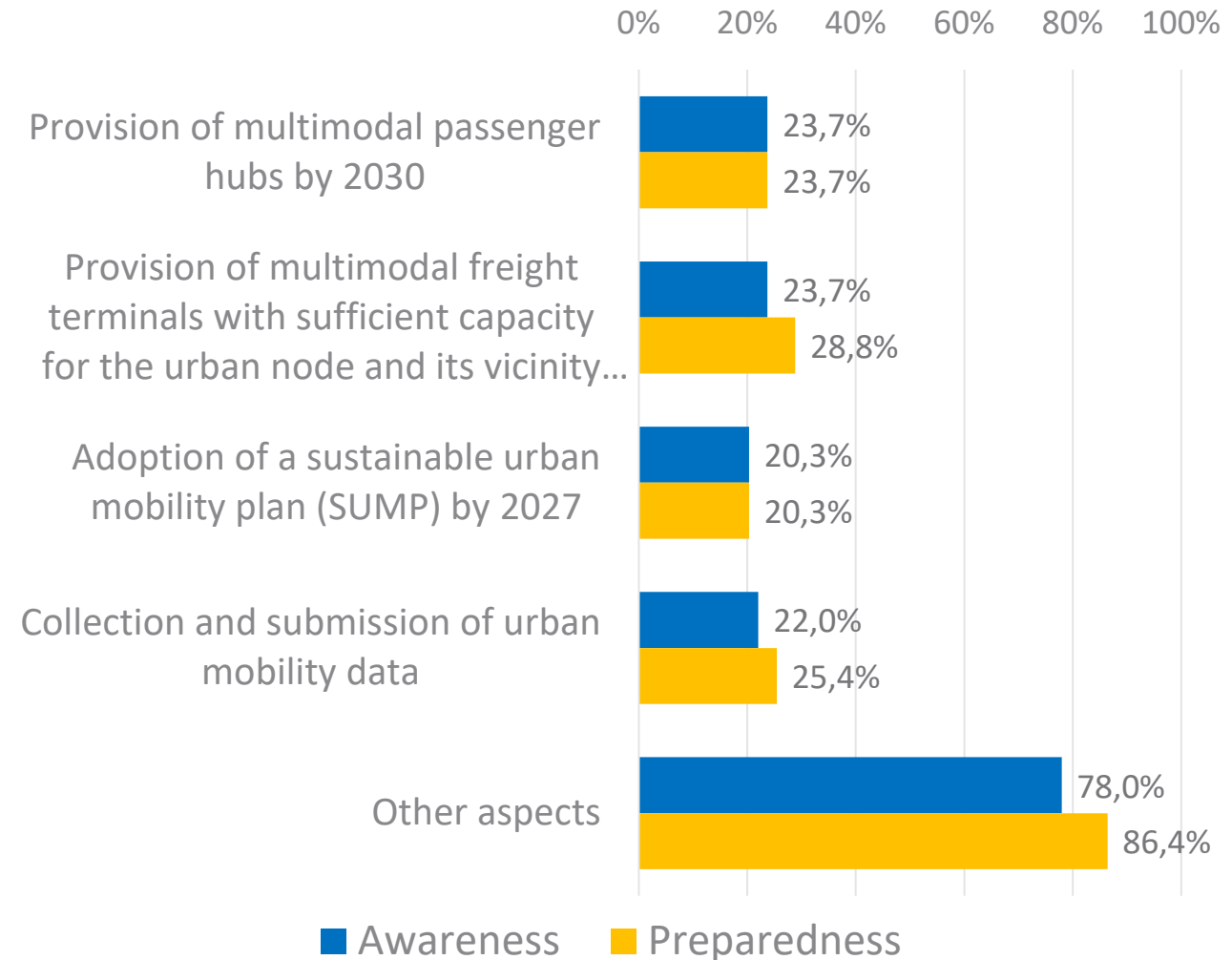
TEN-T regulation

Awareness vs. preparedness

Awareness vs. Preparedness (mean)*



Share of "Do not know" answers (%)



* Scale: 1- Not aware/prepared at all ... 5- Very well aware/prepared

TEN-T regulation

AWARENESS OF REQUIREMENTS IN THE TEN-T REGULATION

(%)

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

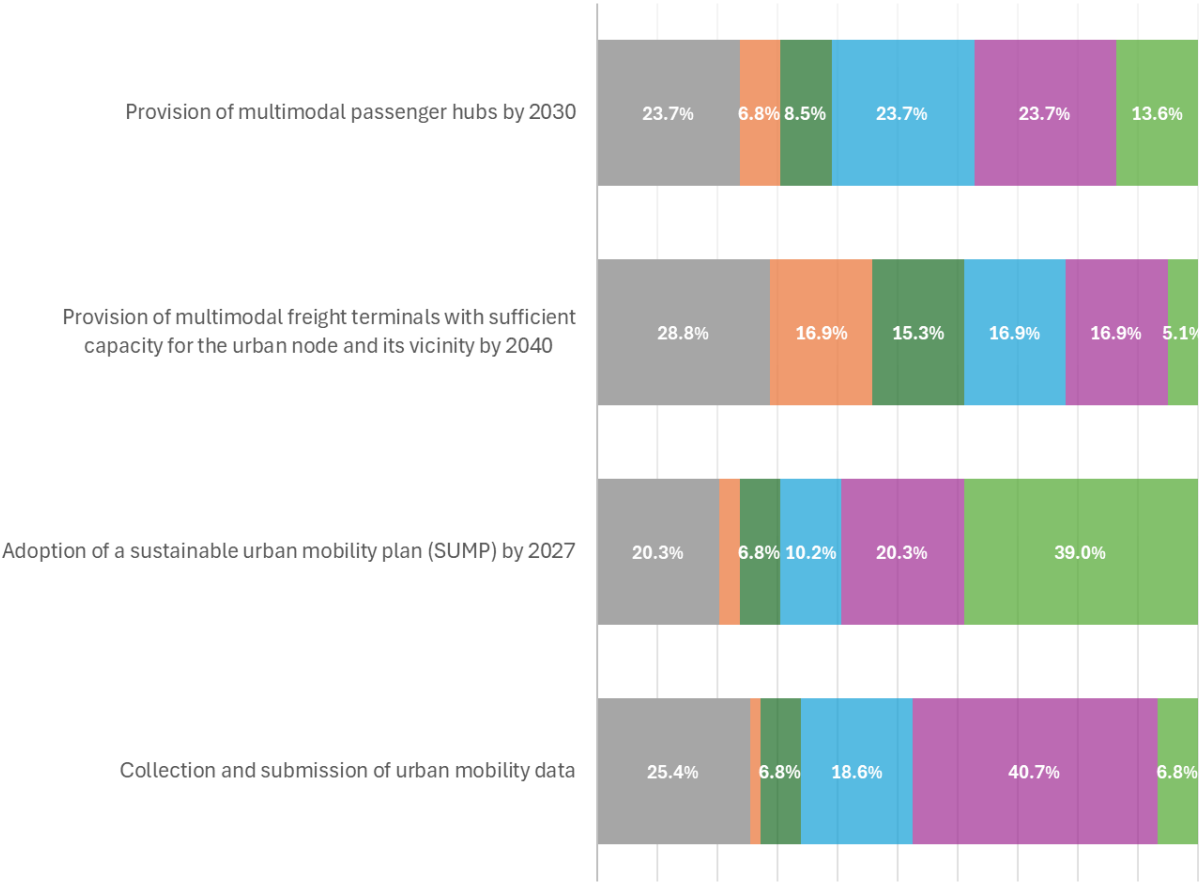


■ I do not know ■ 1- Not aware at all ■ 2 ■ 3 ■ 4 ■ 5- Very well aware

PREPAREDNESS FOR REQUIREMENTS IN THE TEN-T REGULATION

(%)

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



■ I do not know ■ 1- Not prepared at all ■ 2 ■ 3 ■ 4 ■ 5- Very well prepared

TOPIC OF INTERESTS (Top 5)

TEN-T requirements for Urban Nodes

- 1-2. Urban nodes as actors in the TEN-T corridor governance
- 1-2. Funding
- 3. Governance models for cooperation on urban nodes level
- 4-5. Development of infrastructure
- 4-5. Land use and spatial planning

Multimodal Hubs

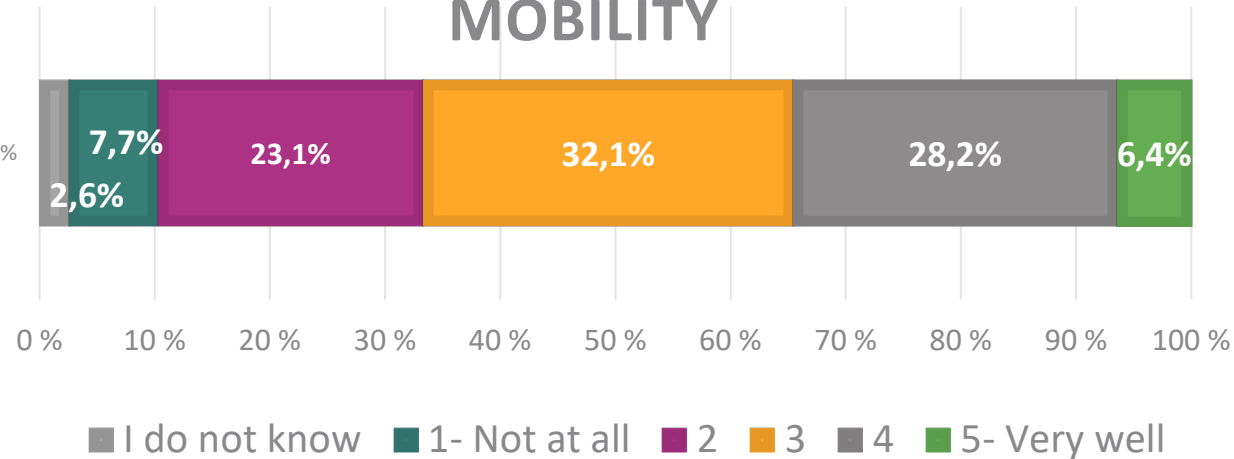
- 1. Financial planning and financial sustainability
- 2. Forecasting future mobility trends
- 3. Promoting of modal shifts
- 4-5. Building political support
- 4-5. Mapping existing passenger flows and mobility demands

Multimodal freight terminals

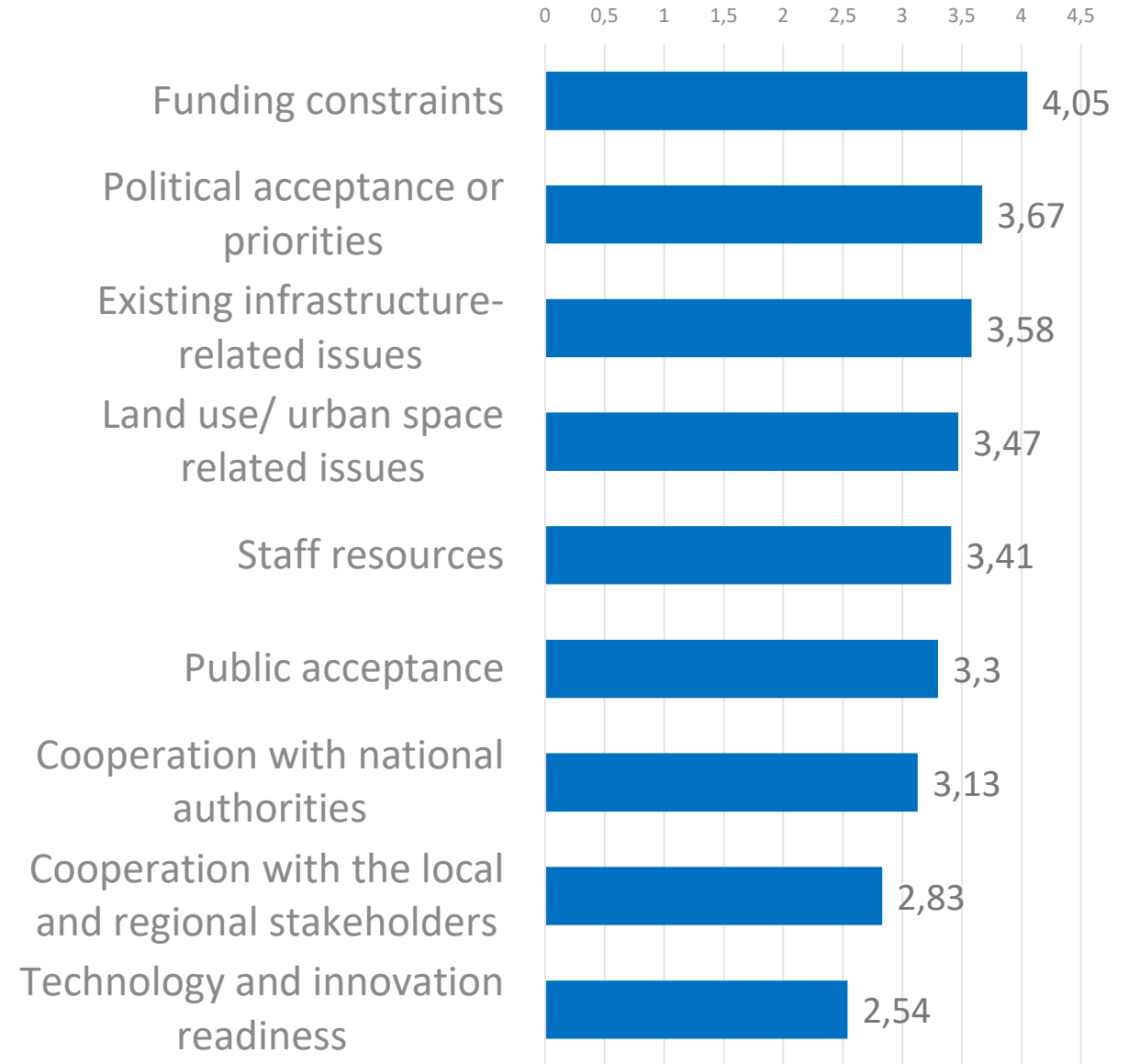
- 1. Improvement of the “Last Mile” road/rail connectivity
- 2. Financial planning and financial sustainability
- 3. Land and spatial planning
- 4. Upgrading / establishing core physical infrastructure
- 5. Technology and innovation readiness

Active mobility

HOW WELL DOES CURRENT PLAN ADDRESS YEAR-ROUND ACTIVE MOBILITY



BIGGEST CHALLENGES FOR PLANNING ACTIVE MOBILITY (MEAN*)



* Scale: 1- Not challenging at all ... 5- Very challenging

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BSR Urban Mobility

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BSR Urban Mobility project is co-funded by the Interreg Baltic Sea region programme 2021–2027.

Some observations

- SUMP**s implemented widely in BSR cities**, many plans cover **wider urban area** (FUA, region etc.)
- Limited **impact on modal shift** so far
- **Urban logistics** are not addressed as widely, public-private cooperation important
- More effective **monitoring and evaluation frameworks** for SUMP**s & SULPs** needed including **clear indicators**
- Common challenges: **financial planning & funding**, staff **resources**, **political acceptance**, **governance** in urban nodes, collection and use of **data**
- Urban nodes are quite **aware of the requirements** concerning SUMP**s** and ready by 2027
- **Knowledge and implementation gaps** concern especially multimodal freight terminals, collection of data and passenger hubs

“There's a question: who is responsible?”



DISCUSSION

Do you see that the results reflect the situation in your country?

**Was there something unexpected in the results?
Something missing?**

Public Acceptance
Governance
Existing infrastructure
Land-use issues
Political acceptance
Funding constraints
Monitoring

A scenic outdoor setting, likely a waterfront promenade, featuring cherry blossom trees in the foreground. In the background, there are people walking, a white tent-like structure, and a body of water with buildings and a boat visible. A green rounded rectangle is overlaid on the image, containing the text "WHAT NEXT?".

WHAT NEXT?

Opportunities for peer learning

- **SUMPs for BSR training programme on-going**
 - Module 3: Collection of data for active modes (March 2026)
 - Module 4: Experimenting with potential mobility solutions to promote active modes (April 2026)
 - Module 5: Engaging stakeholders in planning mobility measures and SUMP (May 2026)
 - + UBC Talks webinar on 14.4. on monitoring and evaluation for active modes!
 - Final conference news will follow soon!
- **BSR Urban Mobility platform**
 - More in-depth analysis of the survey results & focus group interviews with selected local authorities
 - Survey results feed in planning peer learning and capacity building activities
 - First event dedicated to BSR urban nodes in June 2026 – more information will follow!

Training materials already available at BSR SUMP competence centre!



The workshop recording introduces the process of **Choosing Mobility Indicators** by Marcin Wolek from University of Gdansk and two cases from cities on monitoring and evaluation of SUMP. Find out more about Monitoring of School Mobility in Panevezys (Lithuania), and Evaluation of SUMP in Gävle (Sweden).

Slides



PDF: Basic Principles of Monitoring and Evaluation Framework, Kristina Gaučė
PDF: M&E Framework Developed by SUMPs for BSR, Marcin Wolek
PDF: Developing Monitoring for Sustainable Mobility in a Small City, Ritvars Štikovs
PDF: Monitoring and Evaluation for SUMP in Malmö, Andreas Nordin
PDF: Choosing Mobility Indicators – Marcin Wolek
PDF: Monitoring of School Mobility in Panevezys, Jokubas Leipus
PDF: Evaluation for SUMP in Gävle, Aregay Fkadu Kebede

Check the background & additional materials to dive deeper into monitoring and evaluation for SUMP, with links to the SUMP Topic guides, e-courses, manuals, practical tools from other projects as well real-life city cases from all around Europe. Explore the practical tools developed in the SUMPs for BSR project: the indicators selector tool & Monitoring and Evaluation Plan Template.

Background & additional materials

- + Monitoring and Evaluation Indicators Selector Tool (SUMPs for BSR project 2026)
- + Monitoring and Evaluation Plan Template (SUMPs for BSR project 2026)
- + Guidelines for Developing and Implementing a Sustainable Urban Mobility Plan. Second Edition (Rupprecht Consult (eds.) 2019)
- + Topic Guide: Sustainable Urban Mobility Planning in Smaller Cities and Towns (Rupprecht Consult (eds.) 2021)
- + CHALLENGE Monitoring and Evaluation Manual: Assessing the impact of measures and evaluating mobility planning processes (2016)

Exercises

Exercise 1 Selecting Indicators to Monitor Your City's Mobility Challenges

This exercise helps municipalities identify relevant indicators (KPIs) to monitor and evaluate a real mobility challenge in their own city. Participants will use the BSR SUMP Indicator Selector to explore possible indicators and develop a shortlist of KPIs that could realistically support decision-making and monitoring in their local context. The outcome should be a small set of indicators that the city could use in its Sustainable Urban Mobility Plan (SUMP) or related strategies.

Exercise 2 Understanding Why Cycling Is Low in Your City

This exercise focuses on diagnosing mobility challenges using indicators. While indicators are often used to monitor progress, they are equally important for understanding why a problem exists in the first place. In Sustainable Urban Mobility Planning (SUMP), selecting the right indicators helps cities move beyond assumptions and base decisions on evidence. In this exercise, participants will explore which indicators can help explain low cycling levels in a city.

Contacts

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<https://bsr-sump.eu/>



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