

A blurred photograph of a busy city street with several business people in suits walking away from the camera. The background shows tall skyscrapers under a clear blue sky. The overall tone is professional and forward-looking.

# **The great reset or business as usual?**

**How European mobility is re-emerging  
from the pandemic**

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# How European mobility is re-emerging from the pandemic

**O**ver the course of the COVID-19 pandemic, Europe's mobility landscape has undergone one of the biggest periods of upheaval since the end of World War II. With businesses, schools and regular day-to-day activities forced online during the early months of the crisis, demand for public transport effectively disappeared in towns and cities overnight, with only essential workers being encouraged or allowed to use transport.

Passenger rates dropped by 90 percent and roads fell eerily quiet. Parking and congestion fees were suspended in many cities to help essential workers, and transit fares were even made free in some municipalities due to fears of contact between drivers and passengers.

It wasn't all doom and gloom, however. As cities were forced to look at alternatives to public transport without increasing car-use, the rise of safe, low-traffic, or car-free streets and neighbourhoods gave active travel a much-needed shot in the arm.

The huge increase in cycling, along with a rise in the number of temporary and permanent bike lanes and expanded streets to allow for social distancing, has given cities the opportunity to experiment.

Through a series of roundtables, the Cities Today Institute brought together Europe's leading transport policymakers, business and thought leaders to discuss their experiences during one of the most challenging periods for the mobility ecosystem. This paper sets out the vision and insights from those discussions.

# Changing the narrative: how to get riders back on public transport

**A**fter the initial shock from the pandemic, which saw ridership fall by up to 90 percent across Europe, passenger rates have slowly crept up as many countries begin cautiously reopening. But cities face an uphill battle to instil confidence and keep people out of cars.

Some cities said they expect their transport recovery to take years. Others are not sure if or when ridership will return to pre-pandemic levels.

Public messaging at the start of the pandemic, where people were urged to stay at home and out of enclosed spaces, has left an enduring sense of fear among a significant proportion of the population that buses and trains are dangerous vectors of COVID-19. At the onset, public health authorities simply did not have the data to comprehend the full extent of how the virus spreads. Numerous studies have since revealed that with proper



cleaning regimes and social distancing, public transport does not pose a heightened risk.

Analysis by the UK rail safety body (RSSB) in August 2020 revealed that the risk of contracting COVID-19 while travelling by train is 1 in 11,000 journeys. This is equivalent to a chance of less than 0.01 percent, lower than the probability of dying in a road accident. With a face covering, it's 1 in 20,000 journeys, or 0.005 percent.

A study commissioned by the American Public Transportation Association published in September 2020 also concluded that there is no direct correlation between public transit use and COVID-19 spread in cities globally, provided people wear masks and trains and buses are well-ventilated.

Sam Schwartz, the former NYC Traffic Commissioner whose transit consulting firm compiled the report, said the misinformation circulating about the link between COVID-19 and transit was “appalling”.

## Rebuilding confidence

Assuring people that public transport is a safe, convenient option is a priority for cities.

George Lowder, Chief Executive, Transport for Edinburgh said: “One of the biggest challenges for us, will be restoring public confidence in public transport. Some of the messaging in the UK, was quite forceful in urging people to avoid public transport.”

Research published in November 2020 by UK automotive services group RAC revealed that the pandemic may have set attitudes to driving versus using public transport back by as much as two decades.



**George Lowder**

Chief Executive, Transport for Edinburgh

In its annual *Report on Motoring*, the group found that for the first time since 2002, fewer than half of drivers (43 percent) said they would reduce car use, even if train and bus services were improved – down from 57 percent in 2019.

It also found more than half of UK drivers (57 percent) say having access to a car is more important now than it was before the coronavirus pandemic.

To make people feel safer, cities have rapidly expanded payment through contactless options. In August 2020, Valencia's public transport company EMT Valencia launched a mobile ticketing app to enable cashless, contactless bus travel to boost hygiene and passenger confidence and speed up journeys.

# What would encourage public transport use?



Less crowding



Cheaper tickets



Better routes



More frequent services



More punctual services



Simpler payment options



Better access to real-time information

Source: Campaign for Better Transport

The Spanish city also sees this impacting reliance on the car.

Giuseppe Grezzi, Sustainable Mobility Councillor, València City Hall, said: “In the Valencia metropolitan area 73 percent of the modal share is by car. This is a big problem, and if we can find better alternatives through public transport, we should work on them.”

With research - including a 2012 University of Oxford study - suggesting that cash can contain more bacteria than the average household toilet, the rise of contactless payments has become a factor in limiting the spread of COVID-19. In the UK, dozens of major retailers, shops and supermarkets have even stopped accepting cash payments entirely during the pandemic.



**Giuseppe Grezzi**

Sustainable Mobility Councillor, València City Hall

As cities try to entice people back to public transport, mobility leaders have to make sure those services can adapt to shifting patterns.

A March 2021 survey by UK sustainable transport charity, Campaign for Better Transport, asked people what modes of transport they used before the pandemic for various activities and which they intend to use once all pandemic-related travel and leisure restrictions are lifted.

Findings showed that the UK adult population largely expects to choose to travel as they did before the pandemic, with private cars remaining the dominant form of transport for around half of trips for shopping (50 per cent versus 49 per cent before the pandemic), leisure (54 per cent versus 52 per cent pre-pandemic) and personal matters (53 per cent versus 52 per cent pre-pandemic).

Researchers asked respondents what would encourage them to increase their use of public transport in the future. Less crowding (30 percent) came out on top, followed by cheaper tickets (29 percent), better routes (29 percent) and more frequent (26 percent) and punctual (22 percent) services.

Simpler payment options (e.g. the ability to 'touch in and out') would encourage 15 percent, while 12 percent said that better access to real-time information would make them choose public transport more often.

The survey also asked people about their work plans post-COVID-19 and revealed that, whilst two-thirds (65 per cent) of all of those in employment were working entirely from their place of work before the pandemic, just half (53 per cent) plan to do so after restrictions begin to ease.

## The impact of reduced capacity

Even if transport agencies could get numbers to return to pre-pandemic levels, capacity is another conundrum.

Virtually every public transit authority across Europe has introduced caps on the number of passengers allowed on board to facilitate social distancing.

These caps are often set at 25-50 percent of usual numbers, something which has had a knock-on effect in cities where the frequency of services has been reduced or remained static.

At peak hours, buses have often been forced to refuse passengers boarding due to social distancing rules, which has eroded trust in their reliability. On metro and train services, where passenger numbers are often more difficult to control and measure, the opposite effect - overcrowding - has further damaged public confidence.

Images circulating on social media and news outlets of packed London tube stations led to heavy criticism of Mayor Sadiq Khan's handling of the crisis, but with tighter budgets

and reduced capacity, cities are being forced to optimise their networks.

To combat the build-up of ‘pressure points’ at peak hour times, many cities have reached out to employers in a bid to stagger working hours to create a more balanced flow of passengers.

In November, Moscow Metro introduced a trial ‘early bird’ ticketing programme, giving passengers travelling at off-peak times a discount of up to 50 percent on their fare.

The pilot initially ran on two metro lines in the Russian capital, and rewarded commuters travelling between 5:30-7:15am and 8:45-9:15am with a discount to even out passenger numbers and ensure social distancing.

Discounts were automatically applied for contactless Troika Card holders using daily, monthly or annual passes, and local authorities are currently analysing the results of the trial.

Maksim Liksutov, Head of Moscow’s Department of Transport, said he hopes the programme will improve passengers’ experience and boost social distancing.

“This is especially important in the current epidemiological situation.”

In Paris, the Plaine Commune region is currently renewing several partnerships with local businesses to smooth out rush hour peaks in the French capital.

Partnering with key stakeholders – including the state-owned transport operator RATP, the French railway provider SNCF, and around 15 companies, the suburban region plans to reduce the number of passengers at peak hours by up to 10 percent.

To achieve this, the region will work with



## **Esseline Schieven**

Director of Mobility and Public Space, Amsterdam

public and private firms to introduce various changes to employee work habits, including staggered hours and the development of cycling and carpooling schemes.

A number of cities are also using camera-based technology and booking systems to avoid overcrowding.

Amsterdam, for instance, is using heat detection cameras in busy public areas and check-in data on transport, and deploying signage so citizens know when services are full.

The municipality has also agreed with universities and schools that they won’t start

lessons until after 9am – around 40 percent of rush-hour passengers in Amsterdam are students.

Esseline Schieven, Director of Mobility and Public Space, Amsterdam, said: “We’ve been talking about it for years but COVID-19 meant we were able to make this deal happen.”

Jaspal Singh, Senior Expert, IT and Development at international public transport association UITP, noted that a key trend his organisation is seeing among members is the implementation of a mixture of dedicated vehicles and on-demand options to manage peak times.

He said this addresses a key challenge: “On one side you have fewer passengers so you should ideally reduce your fleet but on the other hand, you have to provide space within the vehicles to support social distancing, meaning deploying more vehicles.”

## Flexible ticketing

With an increasingly adaptable workforce, flexibility with fares has become key for transit operators.

Traditionally European commuters have invested in yearly or monthly public transit passes as a way to save money on their daily commutes. This in turn had given transit operators a predictable, steady income stream.

But with homeworking, and an envisioned end to the five-day office working model in favour of a hybrid option once the pandemic passes, the season ticket has quickly become redundant.

This is particularly relevant to the UK and Ireland, which have the most expensive monthly travel

tickets in Europe, according to a recent survey by Deutsche Bank.

In June, the UK Government announced the introduction of flexible season tickets, designed to meet the changing needs of commuters travelling between towns and cities. But since its introduction, campaigners and consumers have raised concerns about whether the discounts offered – a maximum of 15 percent – will be enough to entice people back on public transport.

“Unfortunately, these new flexible tickets do not appear to offer the kind of savings we had hoped for and are not comparable to the discounts for people commuting full time,” said Norman Baker, a former UK Transport Minister and Adviser at Campaign for Better Transport.

“There appears to be no standard level of discount and in some cases the flexible season ticket could end up being more expensive than the day return option.”

Unlike standard season tickets, the new flexible tickets are not available in first class and cannot be used on TfL services, meaning commuters to the capital still need to pay on arrival.

There is also no cheaper off-peak option, meaning those commuting outside peak times will see no savings.

“The projected growth in hybrid working has made this an urgent issue and to avoid an increase in commuting by car we need to encourage people back on board trains,” added Baker. “The test will be whether the level of discounts offered will entice people onto rail. Sadly, we don’t think they will, except at the margins, so this could turn out to be a real missed opportunity.”

Liam Robinson, Chairperson of Liverpool City Council’s Transport Committee said: “We’re working with the bus and train companies that we have here to put in place flexible season tickets – the Monday to Friday, nine to five commute, is no longer the dominant model. To put it crudely, if we want to get more bums back on seats, it’s going to have to be a much better value proposition.

“That’s more challenging in the UK, because the network is deregulated and privatised, but as we are a devolved city region with new powers akin to those in London we can take greater control and actually determine what happens.”

In Scania County, Sweden, the provincial council Region Skåne introduced a seven-day ticket to counter the sharp drop in demand for monthly tickets.

“We realised early that we had to do something because our passengers were not interested in buying a monthly ticket. We quickly invented the seven-day ticket,” said Carina Zachau, Deputy Governor, Region Skåne.

“And we can see that that’s a way to try to get the travellers back,” noting that people have more confidence in making decisions week to week amid COVID-19 uncertainty. The region has also introduced a loan scheme so passengers can share their monthly pass with a relative or friend.

“This is good because it can bring some new travellers to public transport – otherwise they maybe wouldn’t use public transport at all, and



**Liam Robinson**

Chairperson of Liverpool City Council’s Transport Committee

they would take the car instead,” Zachau explained.

Another radical option being floated by some is offering a three-year pass at a much more attractive rate than three separate annual passes – this would be a gamble for cities and operators but could also provide some short-term financial certainty.

In recent years, European cities have embraced more unconventional ticketing that cut the price of annual tickets in a bid to boost ridership (and provide financial guarantees).

Since reducing the price of its annual travel pass from €449 to €365 (US\$533 to US\$433) in May 2012, Vienna has increased ticket sales from 321,000 in 2011 to 822,000 in 2018. When children and students (eligible

for cheaper passes) are added to the total, around 1.1 million of Vienna's 1.9 million population now has a long-term pass, and ridership has also risen.

The brainchild of former Deputy Mayor, Maria Vassilakou – who ran for office for the Green Party in 2010 promising €100 yearly season tickets, but had to settle for a €365 compromise – the 'Vienna model' has served as an example to larger cities looking to expand public transport usage without losing a considerable chunk of its revenue.

Before the introduction of €1 a day travel, opponents pointed out that public transport was already relatively cheap in Vienna when compared to other European cities.

An annual travel pass covering London's six zones costs £2708 (US\$3760), while in Dublin, which has a population 25 percent smaller than Vienna, a yearly pass is priced at €1950 (US\$2350).

The Vienna model is already being looked at by other major European cities, particularly in Germany.

In April 2021, the City of Leipzig announced it will gradually phase in a €365 annual ticket for public transport. The concept has been in the pipeline for years and was a major campaign issue in the city's mayoral elections last year.

From August 1, anyone in possession of a Leipzig Pass (a €35 monthly pass held by approximately 55,000 low-income residents) will be eligible for the ticket.

Then from January 1, 2022 the scheme will be expanded to cover those under the age of 27.

The €365 ticket is set to be trialled for one year to boost local public transport, and will be funded by Germany's Federal Ministry for Transport. After the trial period, a decision will be made as to

whether the ticket will be made permanently available.

The city's Mayor Burkhard Jung had hoped to introduce the scheme on a more comprehensive scale, but budget constraints have curbed wider plans.

Speaking before its introduction, Torben Heinemann, Leipzig's former Head of Planning emphasised the challenges facing the city in keeping commuters on public transport. "In Germany lots of people have cars so they can choose that option [as an alternative to public transport], they're not captive users.

"But now, we can see that some parents might say, 'Well, I will not use public transport and I will not allow my child to either,' because of health concerns.

"So we are really afraid that bringing your kid to school will catch on. We can talk about how public transport is safe, but in their mind it is unhealthy – this mindset is going to be difficult to shift.

"We're really afraid that we will lose those backbone monthly or yearly ticketholders."

# Avoiding a car-led recovery

**C**ities need to take a multi-pronged approach to avoid a car-led recovery and while improved public transport is a major aspect of this, there are several levers that need to be pulled.

In March 2020 the European Court of Auditors (ECA) published its *Sustainable Urban Mobility in the EU* report, which examined whether EU support had helped make mobility more sustainable and whether cities had made progress since the European Commission's 2013 Urban Mobility Package.

The report focused on eight cities: Hamburg, Leipzig, Naples, Palermo, Łódź, Warsaw, Barcelona and Madrid; with a further 88 surveyed and 15 projects assessed.

Overall, it found 'limited take-up' on EU guidance on how to spend funds, and a lack of coherence among city governments in delivering projects to increase sustainable transport.

One senior ECA auditor said: "Every time we provide an audit report we try to provide a reality check to stakeholders.

"Progress depends on many factors, such as the push and pull principle. It's not just about making public transport and active travel more attractive,



Credit © Pramote Soongkitboon | Dreamstime.com

but also about making effective steps to dissuade people from using private cars.”

When looking at how to raise revenue while helping the environment, congestion charging and low-emission zones are often heralded as a logical choice for cities.

Some European cities, including London, Stockholm, Milan and Barcelona already operate such schemes, though many were suspended during COVID-19 to ease the burden on essential workers.

While congestion pricing may be the ‘stick’ needed to push people out of cars, there need to be viable alternatives for commuters that counter the reluctance to take public transport.

One of the few upsides of the pandemic has been the huge expansion of cycling and pedestrian and initiatives across Europe that have boosted confidence and given more authority to active travel.

Liam Robinson, Chairperson of the Transport Committee, Liverpool City Council said: “We have noticed a significant rise in cycling throughout the pandemic. During last summer we saw a 200 percent increase. We’re now trying to hardwire this shift with our pop-up cycling infrastructure as well as longer-term improvements, including desegregated facilities, and also roll out more low-traffic neighbourhoods. Because if the pandemic has had any positive effect – and I’m not trying to trivialise the awful impact – it’s that a lot of people did like the fact that their local streets were less congested, and generally nicer places to be.”

## Low-traffic schemes

London’s schemes, which sprung up across the city over the summer months after a government funding boost, included wider pavements, pop-up cycle lanes, and low-traffic neighbourhoods (LTNs) – where giant planter pots and bollards were strategically placed on roads in residential neighbourhoods to restrict or block traffic.

The measures were introduced to help facilitate social distancing on streets and make walking and cycling a safer and more attractive option for trips previously made on public transport or by car.

While welcomed by most, some of the schemes proved highly controversial, with local councils facing street protests from residents and in some cases attacks on city property.

Often this was due to a lack of engagement with the community, with some LTNs appearing overnight without any consultation.

In September 2020, London’s Wandsworth Council removed its LTNs less than one month after their introduction following a furious local

backlash. The response from residents and concerns around access for emergency vehicles were cited as the main reasons for the withdrawal, with videos of ambulances and fire engines struggling to gain access seen across social media.

In November 2020, London's Ambulance Service raised concerns regarding a number of the city's LTNs, with a spokesperson saying: "Changes to road layouts, traffic management schemes and road closures all have the potential to impede our response to the most critically ill people and could delay life-saving treatments or conveyance to the nearest emergency department."

Several other London councils have since backtracked on their LTNs, and others have delayed or postponed their introduction. Despite the haphazard planning of some schemes, the overall outlook for reducing city car-use remains positive.

An October YouGov poll - commissioned by Greenpeace - found that where UK residents had opinions on LTNs, positive views were three times more likely.

Of the 2,027 surveyed, 57 percent were in favour of the new measures and 16 percent against, while 32 percent had no opinion.

Having the benefit of hindsight, cities are now in a stronger position to incorporate such schemes on a more long-term basis.

But the drop in the overall proportion of journeys being made by more sustainable forms of transport remains stark in most cities.

The number of journeys walked, cycled or made by public transport in London has fallen from 63 percent to 57 per cent as a consequence of the pandemic.

This is primarily a result of the huge drop in Tube and bus journeys and the return to car travel over



## Mariano Majan

GM Nordics & Southern EU, Via

the last year, despite an increase in cycling levels across the capital.

It means the city has fallen further behind in its target of ensuring 80 percent of journeys are made by active or sustainable forms of transport by 2041.

While improving infrastructure can boost cycling numbers, it remains to be seen whether this can actually stem an increase in car journeys.

Mariano Majan, Remix's former Head of International, now Via's GM Nordics & Southern EU, said: "There is a need to improve bicycle infrastructure - but it's not going to cover all trips that were being made by public transport, because they're too far away.

"I think there's this justified fear that people will go back to their

cars when they stop working from home so much, and the impact that this can have on traffic and emissions is immense.

“I’m not against boosting bicycle infrastructure, actually I’m the opposite, but it’s important to note that it’s not the only solution to the problem.

“It’s important for cities to be flexible with the level of service on offer because traditionally transportation systems have been slow to change and adapt.”

## Incentives

Besides changing the physical landscape to make walking and cycling more attractive, some governments are now offering individual financial incentives to boost active travel.

In April 2021, French lawmakers approved a measure to offer commuters a €2,500 grant to trade-in ageing high emission cars for electric bicycles as part of a scrappage scheme.

A similar scheme was introduced in Lithuania last year, when its Environmental Project Management Agency (APVA) offered residents a €1,000 grant for trading in their old vehicles, to use on an even wider range of mobility options, including e-scooters, e-bikes, and public transport tickets.

Partnerships between the public, private and educational sectors have also become increasingly common.

In the UK, Transport for West Midlands (TfWM) teamed up with the University of Warwick in March 2021 for a two-year trial aimed at persuading motorists to switch their cars for more environmentally friendly modes of transport.

The Future Transport Showcase will use



Credit © Pakin Songmor | Dreamstime.com

e-scooters, on-demand buses and a shared car scheme to reduce personal vehicle usage, cut carbon emissions and create a more eco-friendly campus.

Throughout the trial, participants will be encouraged to change their transport choices and incentives will be offered for people who choose

greener travel as part of the “choose your way Warwick” campaign, hosted on the Betterpoints App – a rewards platform where points can be converted to vouchers that can be used in shops.

West Midlands Mayor Andy Street said: “The Future Transport Showcase will offer students and staff more flexibility, choice, and greener travel solutions for the region, at a time when we are facing a climate emergency and urging people to leave the car at home.

“And this trial will show what works as we develop transport policies to address the climate emergency we all face.”

## Transport on demand

Pre-pandemic, the City of Lisbon already had a major drive to expand transport capacity and sustainability and boost usage through simplified ticketing and pricing offers. Vasco Móra, Mobility Adviser to the Deputy Mayor, City of Lisbon, described how previously Lisbon’s metropolitan area ticketing system had been confusing, with an overwhelming number of choices. In April 2019, monthly tickets were condensed down to two main options – a municipal pass for €30 (US\$35) or an inter-municipal pass covering 18 surrounding municipalities for €40. Subsidised family passes were also introduced, capped at the cost of two metropolitan passes. A few months later, public transport demand was up by around 25 percent, with some lines seeing an increase of up to 35 percent.

This strategy was coupled with the city embracing services such as micromobility, following citizen feedback that they wanted more transport flexibility.

“We have everything on demand these days – we

have Netflix, we have Internet wherever and whenever, we can watch TV on catch-up, but then we have very fixed schedules of transport. It doesn’t make sense to passengers,” said Móra, noting that people who finish work late at night, for example, need more options as transit services are less frequent.

Now, in light of the pandemic, with public transport ridership – particularly from tourists – reduced, Lisbon is doubling down on this approach.

Móra explained: “We are trying to couple micromobility solutions, including scooters and bike-share, with the bus, meaning that if you have a monthly transit ticket, you can benefit from a big discount on something else. This is huge because you are bringing people the flexibility that public transit doesn’t offer all the time.”

He added: “We have to stop looking at things as all or nothing and start to see it as a probabilistic model, where people hopefully use public transport 80 percent of the time – every time they choose public transport it’s a win, but we have to understand that other times they will need to use micromobility or even ride-hailing.”

# Looking to the future

**T**he European Green Deal, announced just before the pandemic struck, set ambitious targets that will inevitably become ever more pressing for municipal leaders as the pandemic subsides.

Dubbed as Europe's "man on the moon moment" by EU Commission president Ursula von der Leyen, the €1-trillion, 10-year plan has a bloc-wide goal of net zero carbon emissions by 2050, and a 50 to 55 percent cut in emissions by 2030 compared to 1990 levels.

"Public transport is key to a green recovery as it delivers more in terms of job creation and economic development, said Philip Turner, Head of Sustainable Development, UITP.

"Today's challenges will not be met without a clear priority given to public transport as a vital pillar for economic, social and environmental recovery, both in the short and long-term.

"Public transport also raises the level of climate ambition and is the fastest and most cost-efficient way to decarbonise people's daily mobility. Unleashing the full benefits of public transport and decarbonisation will be key to achieving the objectives of the Paris Agreement."

As Europe's vaccine programme steps up and life begins to return to normal, the true impact on travel patterns will start being seen. The financial toll incurred by cities will undoubtedly impact this,



creating more space for the private sector to expand new modes of mobility and ways of commuting.

The future could see a balancing act to be struck between private sector on-demand transit-tech firms (offering integrated services, ranging from e-scooters to ride-hailing) against a more proactive approach from governments in managing and merging public and private journeys through data and camera surveillance, such as the model seen in Singapore.

While the car may never be fully replaced, its use can be reduced by incorporating a more flexible, demand-responsive transit system. Mobility hubs – which incorporate multiple modes of transport – have gained traction in recent years, and the pandemic has spurred even more interest.

The hubs bring together public transport stops for buses, trams and trains along with bike share schemes, car clubs, e-scooters, electric vehicle charging points, bike racks and shared taxi rides, and have been expanded across dozens of German cities.

They can also incorporate wider urban planning aims, hosting community facilities such as cafés, fitness areas, and package collection points.

While not excluding the car, the concept nudges people towards electric vehicles, with choices to provide free or subsidised charging.

Some city transport leaders remain optimistic that public transport will continue to be the fastest and most convenient way to get from A to B.

“When we do recover, no one really knows what will happen. But I believe most of our traffic patterns will come back [to previous levels], said Mattihas Lundberg, Head of Transportation Planning, Stockholm. “Public transport really is the backbone of the city.”

