

Eurocities Pulse Mayors Survey 2025

A state of cities report through
the voices of mayors



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**Mathias
De Clercq**
President of Eurocities
and Mayor of Ghent

In recent months, many mayors have reached out to share their concerns about the situation in our immediate neighbourhood, particularly in Ukraine and Turkey. Many Eurocities members are located in these countries, where mayors face difficult and uncertain futures. Many of us have drawn attention to the plight of our fellow mayors and sought ways to support them, including by using our collective voice.

Despite many challenges over the past twelve months, mayors across Europe have continued to raise their voices, demonstrating bold leadership in tackling issues at local, national and global level. From innovation and sustainability to housing and mobility, city leaders have stepped up to deliver meaningful change. Their achievements highlight the power of city leadership in shaping Europe's future and reinforce that cities are at the forefront of developing solutions that benefit everyone.

Some of these achievements are highlighted in this publication. It was encouraging to see that democracy and civil engagement are the areas where most mayors felt proud of the difference they have made since last year. In a year of political uncertainty, strengthening democracy, citizen participation and social cohesion is a significant success for our mayors.

With the new European Commission having started just a few months ago, we have crucial months ahead for shaping the future of our cities. As mayors, we aim for an ambitious EU budget with a strong urban dimension, enabling cities to invest in sustainable urban development and to stay frontrunners in the implementation of EU ambitions and policy.

We will also contribute to the EU's affordable housing plan and elaborate the Policy Agenda for Cities, as highlighted by European Commission Executive Vice-President Raffaele Fitto in his guest contribution to this publication. Furthermore, we will deliver concrete recommendations to the EU institutions ahead of the new action plan on the implementation of the European Pillar of Social Rights, a priority for many mayors according to this survey.

In all areas, we are working to counter mistrust in politics by bringing people closer to decision-making, which happens best at local level. We must ensure that cities have a seat at the table, as full partners, to shape and implement EU policies that ultimately focus on people, as highlighted by many of my fellow mayors in response to this survey.

As President of this network, I will continue to call on, count on and be grateful for the strong commitment of mayors from cities across Europe to stand up for people's rights. Empowering cities empowers people. On that note, I present you the Eurocities Pulse Mayors Survey 2025.



André Sobczak
Secretary General,
Eurocities

This third edition of the Eurocities Pulse Mayors Survey is based on the replies of almost 100 mayors from 26 countries, who I wish to thank for generously sharing with us their time and insights. Their ideas and needs will directly feed into our advocacy work, particularly for the upcoming Policy Agenda for Cities that we prepare with the European Commission's Executive Vice President Raffaele Fitto, who shares his insights in this document as well as the President of the European Committee of the Regions Katta Tüttö.

This edition also provides interesting perspectives on the current financial needs at local level. With new priorities shaping the next seven-year EU budget - such as defence and competitiveness - we need to ensure that there will still be sufficient resources to match cities' priorities.

It is noticeable that housing continues to rise as a priority for European mayors, and that mayors' commitment to climate action remains steadfast, despite changing political environments.

Our special section on housing introduced by another guest essay from Matthew Baldwin, Head of the European Commission's Housing Taskforce, picks up that, this year, affordable housing is the number one priority for one in six mayors, twice as many as last year. The recently published emergency housing plan of the Mayors for Housing Coalition that we endorsed and contributed to, contains concrete proposals to tackle the housing crisis.

In our other special section, we chose a topic eternally at the heart of the urban fabric, mobility, where mayors maintain bold ambitions, but are often stymied by operational blockages. In her guest essay, Charlotte Halpern of Sciences Po explains this requires looking beyond technological fixes and overcoming deficiencies in governance capacities.

Economic growth and attractiveness is also on the rise for mayors, leaping from eighth place last year to round off this year's top five priorities. With rising economic uncertainty and a renewed EU focus on competitiveness through initiatives like the Clean Industrial Deal, cities are stepping up on job creation, investment attraction and financial resilience. Cities must be a core part of this deal, and in the delivery of the new competitiveness fund, because they are active actors of economic growth and competitiveness.

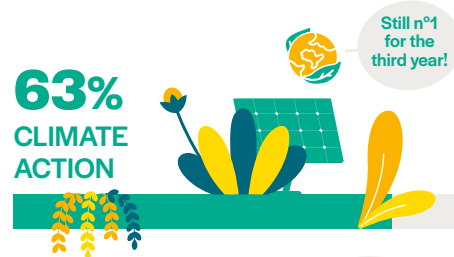
Mayors further indicate a generally positive outlook on the future of the European Union. Hence why, in Eurocities, we propose a strong alliance between mayors and the EU institutions, backed up by an ambitious Policy Agenda for Cities mentioned above.

I encourage you to look at the results presented in these pages, along with our guest essays. Through our mayors, we will continue to work for a Europe that better represents its people.

In 2025, Eurocities ran a survey collecting answers from 86 mayors of major European cities.

The analysis of this survey paints a picture of their priorities, challenges, and what they need to reach their goals.

TOP PRIORITIES FOR MAYORS IN 2025



TOP UNEXPECTED SHOCKS FACED BY MAYORS IN 2024



19% BUREAUCRACY AND GOVERNANCE

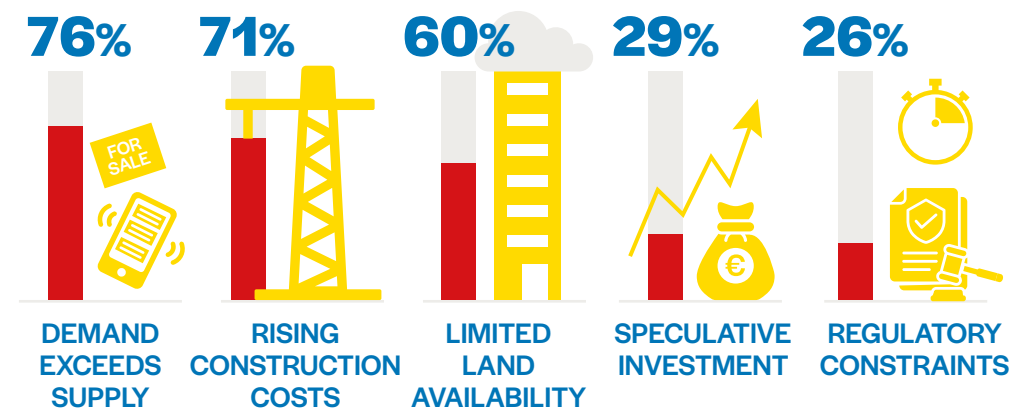
13% GEOPOLITICAL INSTABILITY

HOUSING

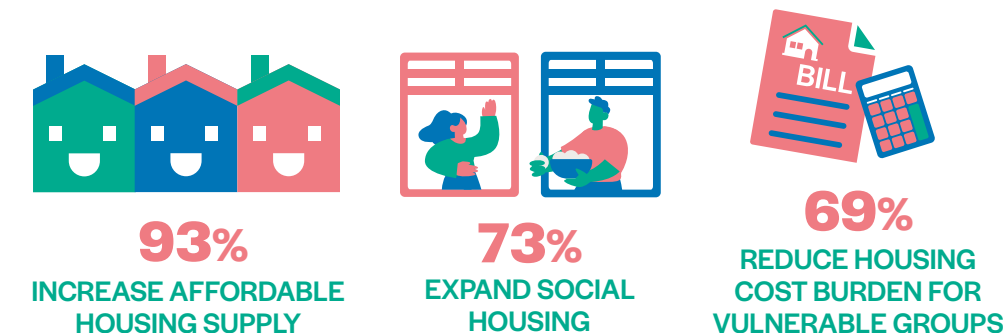
A **WORSENING CRISIS** ACROSS EUROPEAN CITIES



TOP DRIVERS OF HOUSING UNAFFORDABILITY



TOP HOUSING DEVELOPMENT PRIORITIES



MOBILITY

TOP PUBLIC TRANSPORT CHALLENGES FOR CITIES



57%

INSUFFICIENT FUNDING
FOR TRANSPORT
INVESTMENT



43%

HIGH OPERATING
AND MAINTENANCE
COSTS



38%

ACCESSIBILITY AND
AFFORDABILITY

TOP MOBILITY PRIORITIES FOR MAYORS



60%

EXPAND PUBLIC
TRANSPORT
NETWORKS



48%

ENSURE
AFFORDABILITY
AND ACCESSIBILITY



48%

DEVELOP
MULTIMODAL,
INTEGRATED SYSTEMS

TRUST, DEMOCRACY, ECONOMY, AND EU OPTIMISM

69% OF MAYORS REPORT **HIGH TRUST IN EU INSTITUTIONS**

ONLY 2% REPORT LOW TRUST

NO CITY REPORTED ZERO TRUST



73% OF MAYORS
**ARE OPTIMISTIC
ABOUT THE EU'S
FUTURE** COMPARED
TO 62% OPTIMISM
AMONG EU CITIZENS

ONLY 2% OF MAYORS
EXPRESS PESSIMISM

64% OF MAYORS ARE
**CONFIDENT IN THEIR
CITY'S ECONOMIC
OUTLOOK** COMPARED TO
A LOWER 30% OF CONFIDENCE
FOR THE NATIONAL
ECONOMIC
OUTLOOK



69% SAY
**MULTI-LEVEL
COOPERATION**
HAS IMPROVED OVER
THE PAST 10 YEARS

**LESS THAN
3 OUT OF 10**

MAYORS SAY
THEIR CITY HAS
**HIGH FISCAL
AUTONOMY**



Executive summary

A new European Parliament and new set of European Commissioners bring with them new plans, and a new direction for the EU. This third edition of the Eurocities Pulse Mayors Survey aims to once again ‘take the pulse’ of mayors, gauging their perceptions of major topics on the agendas of European and local leaders. The survey is based on research conducted among mayors from the 218 member cities of the Eurocities network. Between December 2024 and February 2025, mayors were invited to reply to an online survey. This consisted of 9 open-ended and 13 closed questions on perceptions and challenges faced by cities across Europe, ranging from economic and political questions to the state of housing and public transport.

For the closed questions, the results are presented either at an aggregate level or in the specified disaggregated way, for example by region, and without further processing. For some of the questions, such as top priorities for 2025, we used open-ended questions to allow mayors to respond freely without predetermining their response.

To make sense of these responses, we further analysed, then categorised, and ranked them accordingly. For each part of the survey, we gave mayors space to leave additional comments, to further

validate some of the assumptions we might otherwise have made from the results. In addition, we have received further input from other research partners on best practice.

New this year, we have adopted a format based on the successful Eurobarometer survey, which has been conducted regularly since 1974. Our hope is that by tying into this format of public opinion survey we can provide additional perspectives on European trends, stemming from mayors, over the coming years. In total this year, we received 86 responses from mayors of large cities across 26 countries. The responses offer a good representative sample of the political voice of mayors from major European cities on key issues.

What you will read in these pages is a selection of the main findings of the Eurocities Pulse Mayors Survey 2025. Along with our research partners, we plan to further analyse many of these data points to find new insights, and ways to present our findings, over the course of this year.

Climate action remains mayors’ top priority in 2025, with well over half of mayors selecting it for the third year in a row. Despite reduced political attention from the EU institutions, mayors are keen to continue implementing their actions related to both climate adaptation and climate mitigation.

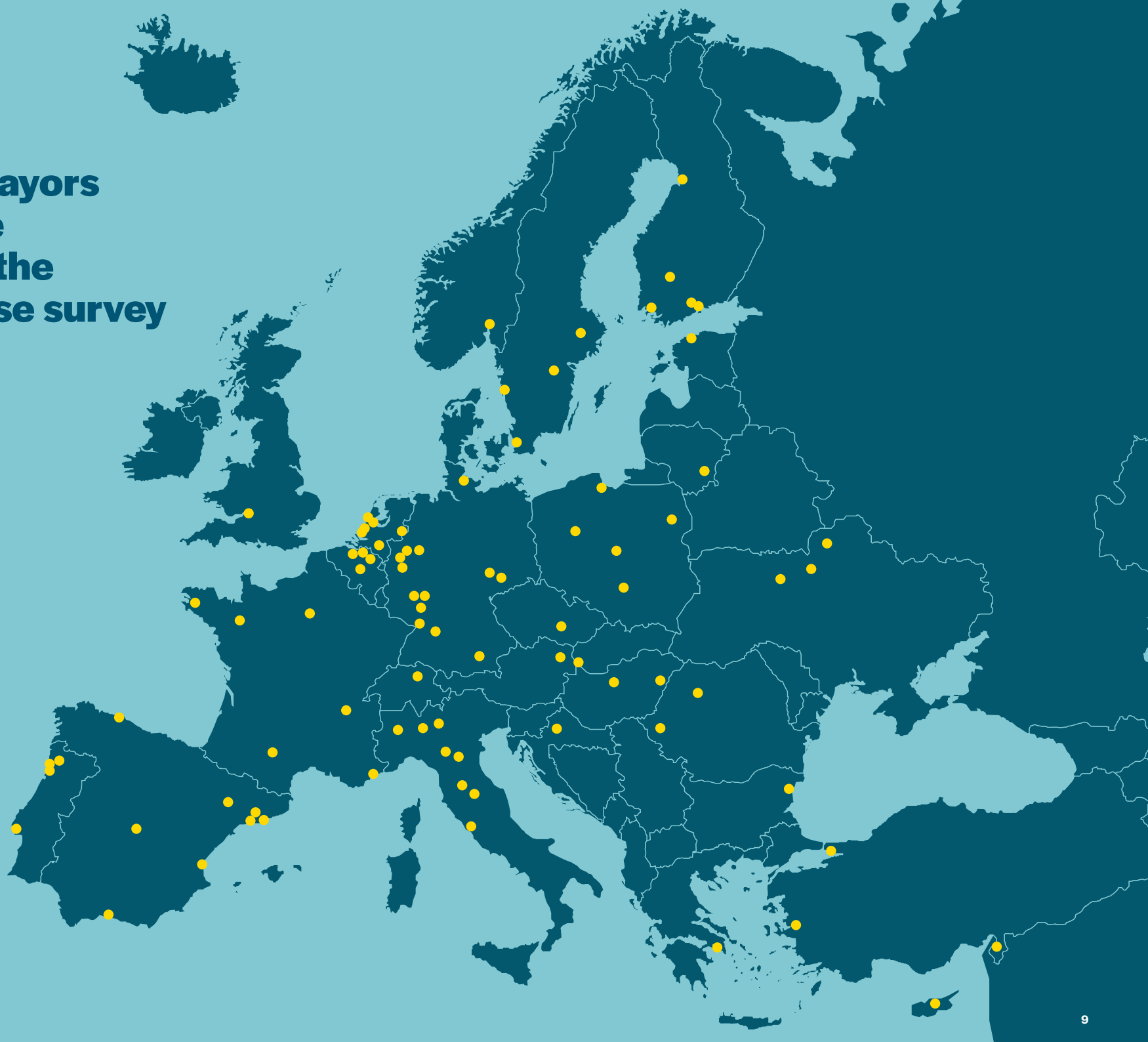
In their responses, mayors highlight cities’ central role in leading climate action in many diverse ways, including enhancing biodiversity, energy efficient building renovation and improving air quality. Mayors also recognise the importance of working with business leaders and private industry to invest in key areas such as renewable energy and urban greening.

Jumping up into second place, from third last year, is affordable housing, with more than one in three mayors selecting it as a top priority. The growing prominence of housing among mayors top priorities has inspired one of our two special focus sections of this year’s edition, which you will find later in the analysis.

In terms of how the EU can best support mayors in achieving these priorities, while we received a range of suggestions, a recurring theme is the need for more direct EU funding to go to cities rather than passing through national or regional governments.

With discussions on the EU budget for 2028-2034 entering a crucial phase, mayors are working both nationally and at the EU level to ensure their experiences and ideas are considered.

**Almost 100 mayors
across Europe
responded to the
Eurocities Pulse survey**



In a different turn from last year, we asked mayors to identify a top unexpected challenge during the course of the year, as well as the achievement that they were most proud of.

Financial constraints and budgetary pressure were the most frequently cited challenges in 2024, with more than a third of mayors highlighting their unexpected impact. While 18% mentioned the housing crisis and rising costs of living. The ongoing impact of Russia's war in Ukraine and global instability were also mentioned prominently.

Despite the unexpected challenges of 2024, mayors across Europe have demonstrated bold leadership in tackling local, national, and global issues. From innovation and sustainability to housing and mobility, city leaders have stepped up to deliver meaningful change. Their achievements highlight the power of city leadership in shaping Europe's future and reinforce that cities are at the forefront of solutions.

Climate action and sustainable mobility are the areas where most mayors felt proud of the difference they have made since last year. Many mayors have led efforts to decarbonise their economies, expand public transport, and invest in clean energy.

The new Eurocities barometer section highlights that while mayors have a high level of trust in EU institutions, national governments receive their lowest scores on trust. Lack of trust in central government is a trend that is widespread across Europe, directly linked with a centralisation trend and a perception of lost autonomy from local governments.

When asked about cooperation with other levels of government over the past 10 years, nearly seven in ten mayors across Europe report an improvement in multi-level cooperation, reflecting a growing recognition of the importance of collaborative governance to address urban challenges.

A guest essay by Raffaele Fitto, Executive Vice-President for Cohesion and Reforms at the European Commission, explains some of his work to ensure EU policies reflect the territorial dimension and address urban needs directly.

A further submission by Kata Tüttő, President of the European Committee of the Regions, explains that Europe's strength lies in empowering local leadership and maintaining a well-functioning Cohesion Policy to ensure stability, resilience, and unity from the ground up.

In the first of two special sections, based on more targeted questions from this year's Eurocities Pulse Mayors Survey, we look at the growing importance of sustainable mobility and public transport in our cities.

In this section, the single biggest priority for mayors is expanding public transport networks and services, with 60% of mayors ranking it among their top three priorities.

Alongside expansion, ensuring public transport remains accessible and affordable is a major concern for cities, ranking as the second-highest priority. As mentioned in their top challenges, cities are increasingly struggling to balance rising operational costs with the need to keep fares low. As outlined by Charlotte Halpern of Sciences Po, this requires empowering cities with better governance frameworks,

funding, and autonomy, as technological solutions alone are not enough to meet the EU's climate targets.

In the second special section, we pick up on the issue that mayors indicate has grown the most among their top priorities since we started this survey three years ago: housing. The housing crisis is increasingly prevalent in cities across our continent, with over one in three mayors (39%) now reporting that housing costs are unaffordable.

Housing shortages, rising rents and affordability issues are growing year on year, leading to a real emergency in many cities, deepening social inequalities and forcing cities to rethink their policies.

Matthew Baldwin, Head of the Housing Task Force of the European Commission, picks up on this pressing issue in a guest contribution that suggests affordable, accessible, and sustainable housing is a shared European responsibility essential for social inclusion, economic stability, and community wellbeing.

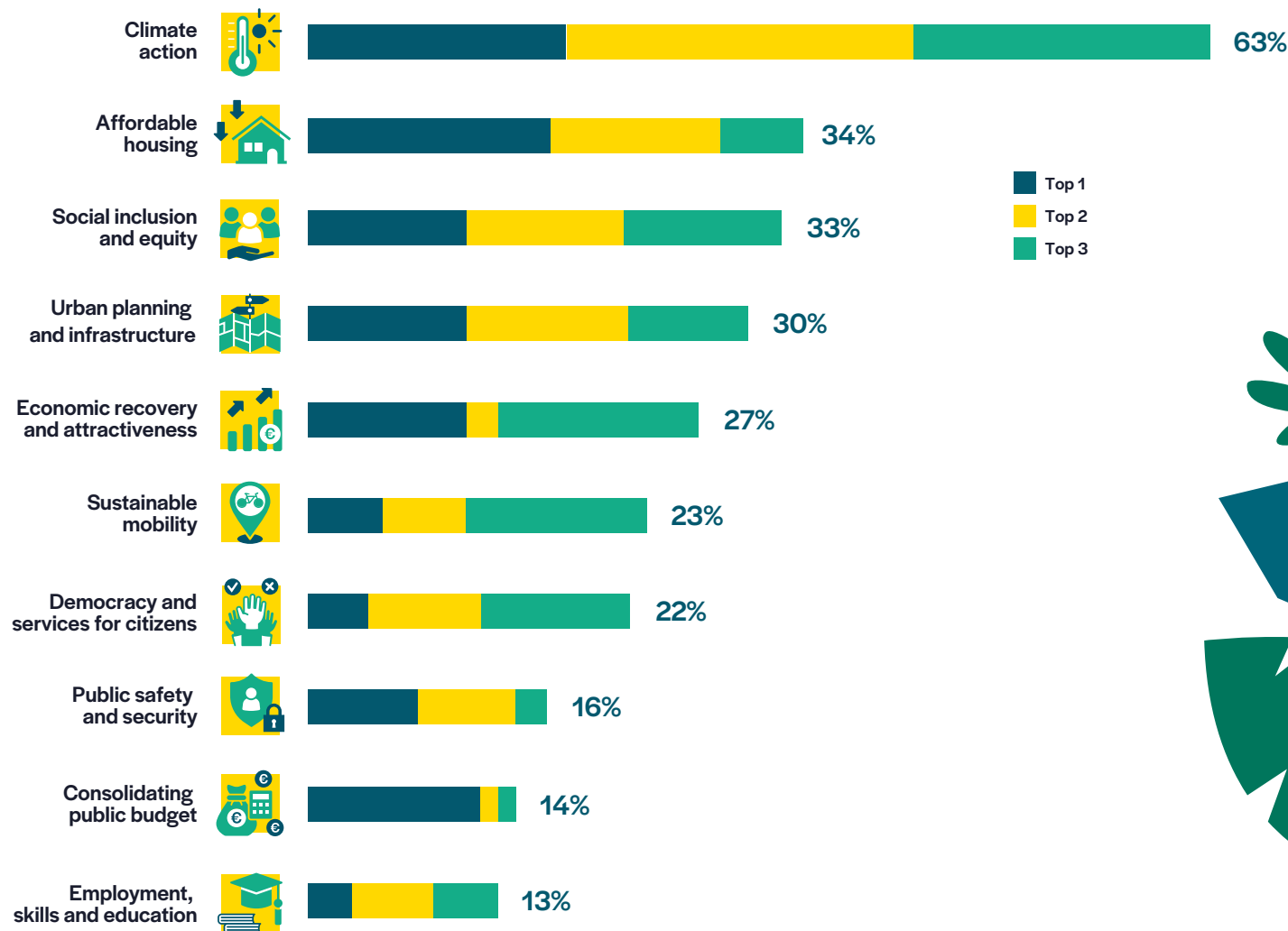
Taking the pulse of European mayors



Looking forward: top priorities for mayors for 2025

Climate action remains mayors' top priority in 2025, with well over half of mayors selecting it for the third year in a row. Despite reduced political support from the EU institutions, mayors are keen to continue implementing actions related to both climate adaptation and climate mitigation. In their responses, mayors highlight cities' central role in leading climate action in many diverse ways, including enhancing biodiversity, energy efficient building renovation and improving air quality. Mayors also recognise the importance of working with business leaders and private industry to invest in key areas such as renewable energy and urban greening.

Top 10 priorities for 2025





Jumping up into second place, from third last year, is affordable housing, with more than one in three mayors selecting it as a top priority. **Interestingly, this year affordable housing is the number one priority for one in six mayors, twice as many as last year.** While housing is not an EU competence, the immediacy of the housing crisis makes it clear that EU action to support cities is a priority.

In their reflections, mayors from geographically disparate cities such as Budapest, Zurich and Barcelona all highlight measures to increase the supply of social and affordable housing, prevent gentrification and regulate short-term rentals. Strategies include public-private partnerships, municipal housing funds, urban revitalisation projects and regulatory measures to protect tenants. Some mayors specifically cite their efforts to integrate housing policy with climate action by promoting energy-efficient renovations.

Social inclusion and equity remains a critical priority for 2025, coming in a close third after affordable housing. Many mayors are prioritising reducing social disparities, tackling segregation, and strengthening community ties. Efforts include expanding social services, fostering intergenerational connections, increasing support for marginalised groups, and improving access to education, employment, and cultural activities.

Urban planning and infrastructure rises into the top four, up from fifth place last year, increasing significantly from 24% to 30.2%. Through their reflections, mayors highlight the need for investments in strategic urban development projects to ensure sustainable growth, resilient infrastructure and efficient public services. Recognising the need for new developments to reflect their sustainability goals, mayors highlight work to modernise roads, water systems and waste treatment facilities, but also promote green urban planning.

Economic growth and attractiveness is also **on the rise, leaping from eighth place last year to round off this year's top five**, increasing from 15% to 27%. With rising economic uncertainty and a renewed EU focus on competitiveness through initiatives like the Clean Industrial Deal, cities are stepping up on job creation, investment attraction and financial resilience. Mayors highlight their efforts to stimulate local economies through innovation, digital transformation and strategic industries. Some cities are supporting industrial competitiveness and business-friendly environments, while others focus on the blue economy and technology hubs to diversify their economic base.

Sustainable mobility, on the other hand, drops slightly in order of importance, **moving from last year's top four to this year's top six**, decreasing from **28% to 23.2%**. To achieve climate goals and improve urban quality of life, cities are prioritising public transport, active mobility, and clean mobility solutions. Some are expanding cycling infrastructure and low-emission transport options, while others focus on integrated digital mobility platforms and multimodal systems (see special section on mobility). Cities are also exploring new funding mechanisms and public-private partnerships to support transport investments.

Democracy and services for citizens is also on the rise this year, rising into seventh position (up from ninth place in 2024), **significantly higher than the previous year**. In the current geopolitical context that throws a shadow over our democracies, mayors are keen to strengthen citizen participation, local governance, digitalisation of public services, and transparent decision-making as a means to increase citizen trust in public institutions.

Public safety drops from sixth position last year to eighth, **with a slightly lower percentage of mayors highlighting it (16.2%)**. Mayors are addressing security challenges such as crime prevention, cybersecurity and crisis resilience.

Consolidating public budgets moves up one place to ninth this year. Budget constraints due to inflation, rising energy costs, and social spending are forcing cities to prioritise financial sustainability. Cities are working to balance budgets while maintaining essential services, focusing on cost-saving measures, smart financial planning, and securing EU funding.

Closing out this year's top ten, and a new entry in the ranking, is employment, skills and education. Investing in education, skills development, and youth employment is a key concern for cities. Cities are focusing on reducing educational inequality and improving vocational training. At the same time, others are fostering partnerships between businesses and educational institutions to address skills gaps.

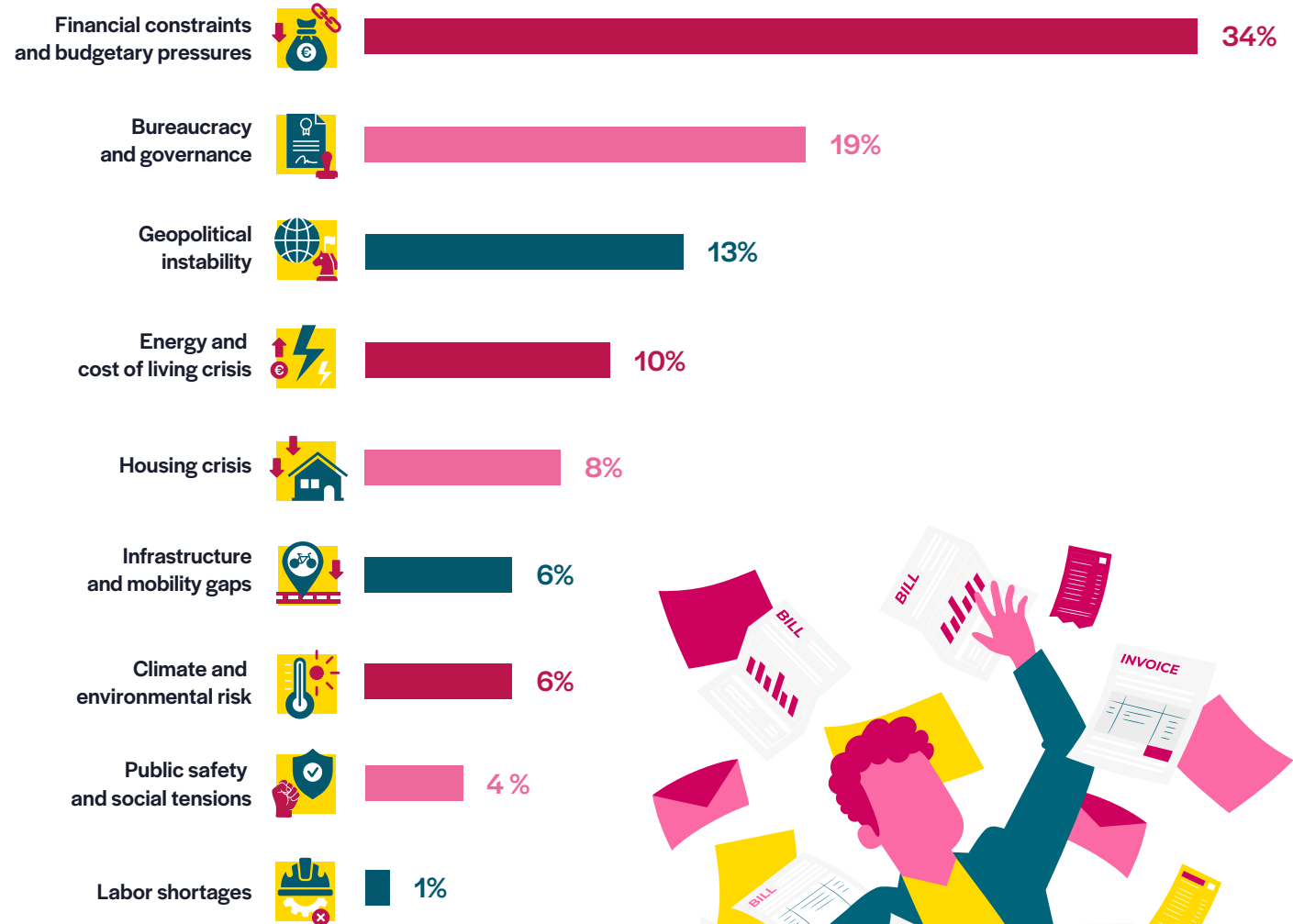
Looking back: unexpected top challenges faced by mayors in 2024

In 2024, city leaders across Europe faced unexpected challenges that significantly impacted their ability to meet strategic goals. Financial constraints and budgetary pressure were the most frequently cited challenges in 2024, with more than a third of mayors (34%) highlighting their unexpected impact.

Budget shortfalls and rising costs have made it increasingly difficult for cities to maintain essential services and invest in strategic projects. Mayors report that national governments have imposed spending cuts or failed to provide sufficient financial resources to match growing local government responsibilities.

Some city leaders also experienced lower-than-expected tax revenues, delays in EU or national funding, and rising costs of public services due to inflation. Financial pressure is forcing cities to delay or cancel investments in housing, infrastructure, sustainability, and public services. City leaders expect the next EU budget to address this so that they can fully deliver on crucial EU policies such as the European Green Deal and drive innovation and social inclusion.

Top unexpected challenges faced by mayors in 2024



Overall, the majority of the top 10 challenges cited by mayors reflect challenges of global current affairs, in one way or another, showing how interlinked local politics is with other levels of government.

Geopolitical instability and the impact of war were prominently mentioned by mayors. The ongoing impact of Russia's war in Ukraine and conflicts in the Middle East have placed an economic, social, and political strain on cities. Cities are absorbing large numbers of displaced people, leading to pressure on housing, infrastructure and social services. Some cities have reallocated budgets to integration, security and defence measures, reducing funding for other strategic priorities. In the face of these challenges, mayors highlight the importance of reinforcing emergency preparedness.

The housing crisis and rising costs of living have been a major challenge for many mayors, mentioned by close to one third of them. Housing shortages, rising rents and affordability issues are growing year on year, leading to a real emergency in many cities, deepening social inequalities and forcing cities to rethink their policies. Many mayors are diverting resources and political focus to this multilayered crisis, which now touches middle-income residents in many cities. Cities have struggled to build enough social and affordable housing due to limited funding, rising construction costs and regulatory obstacles. Tourism and gentrification have exacerbated the housing crisis in some cities. Without adequate housing, mayors face increasing pressure on social services and risk losing economic competitiveness.

Bureaucracy and regulatory hurdles have slowed down urban development actions for many mayors, who cited it as a major unexpected challenge. Bureaucratic obstacles, slow national approvals and fragmented governance structures are delaying major urban projects related to infrastructure such as waste management. Cities feel trapped in rigid funding and administrative structures that do not allow them to act swiftly. Linked to this, some city leaders highlight how political uncertainty, government coalition breakdowns, or national-level policy shifts delayed decision-making and disrupted project funding.

Unexpected climate and environmental challenges remain a key issue for mayors, with extreme weather events, pollution and environmental degradation increasingly disrupting urban life. Cities are facing flooding, droughts, and heatwaves, which require costly interventions and adaptation measures. In their responses, mayors highlight that despite being at the forefront of climate adaptation measures, they lack the resources to fully prepare for future environmental risks, and some highlight further challenges such as reduced funding, or inconclusive political discussions at the national level.

Labour shortages and workforce retention were also highlighted by several cities, particularly in the public administration, education, construction, and social services sectors. This is something that is slowing down project implementation and increasing operational costs, and something that will be exacerbated by demographic shifts, ageing populations, and competition for talent. Mayors look to the EU's focus on skills to ensure cities needs will be recognised, allowing them to act as competition trailblazers.

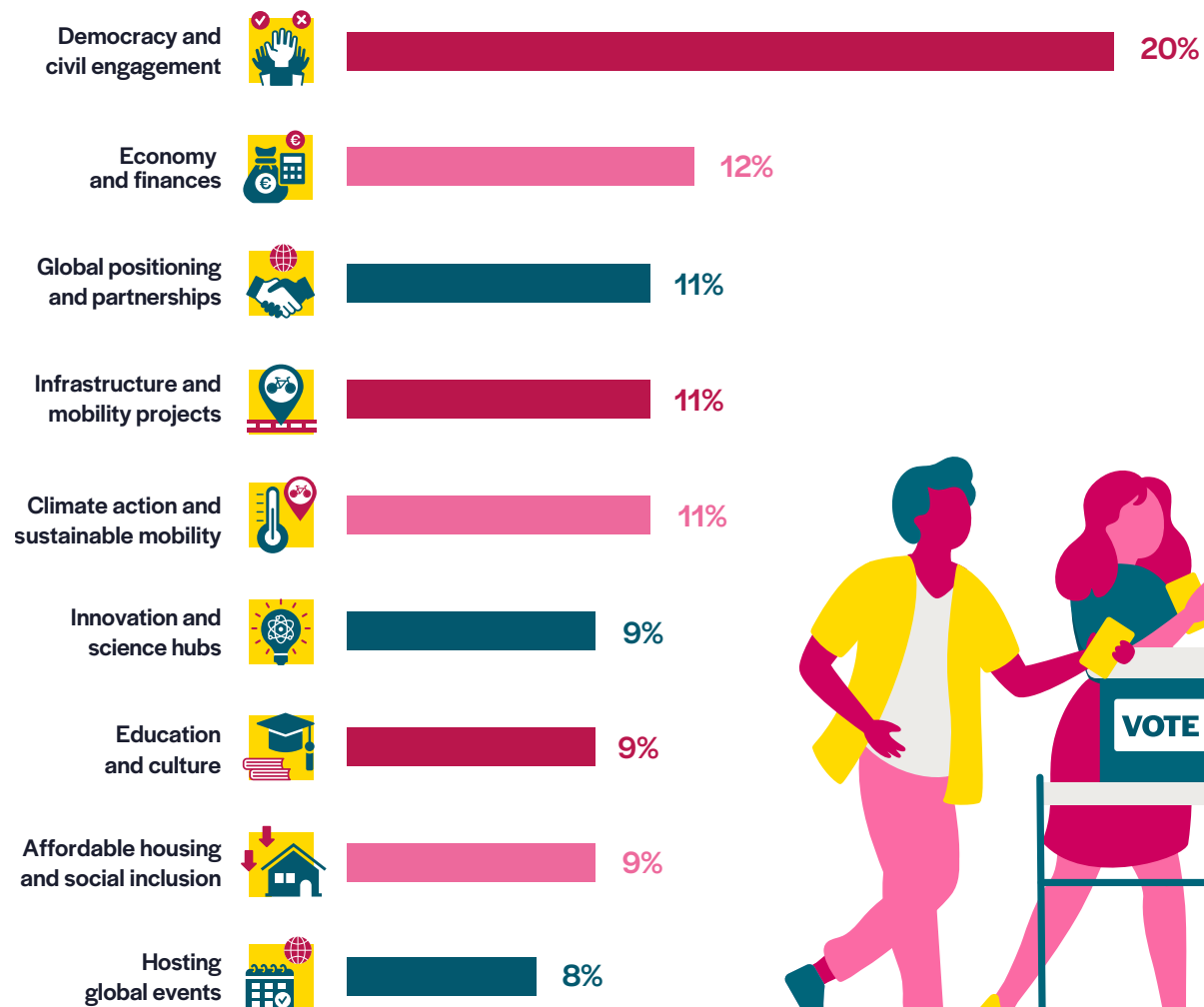
Rising costs and inflation continue to put pressure on municipal budgets. City leaders highlight how they have faced unexpected increases in material and construction costs, leading to delays or reductions in planned investments for housing, infrastructure, and sustainability projects. Inflation has also made it more expensive to maintain public services, forcing some cities to reprioritise budgets at the cost of long-term development goals.

Mayors delivering impact: spotlight on 2024 achievements

Despite the challenges of 2024, mayors across Europe have demonstrated bold leadership in tackling local, national, and global issues. From innovation and sustainability to housing and mobility, city leaders have stepped up to deliver meaningful change. Their achievements highlight the power of city leadership in shaping Europe's future and reinforce that cities are at the forefront of solutions.

Mayors have shared the single achievement they are most proud of in 2024 - showcasing their role as problem-solvers, visionaries, and enablers of transformation. Their successes reflect their commitment to improving the lives of residents, strengthening their economies, and making their cities more resilient.

Top achievements of mayors in 2024





Climate action and sustainable mobility are some of the areas where most mayors feel they have made a difference last year. Many mayors have led efforts to decarbonise their economies, expand public transport, and invest in clean energy. The examples are diverse: Vilnius' mayor cites its Green Vision 2030, rolling out electric buses, urban greening, and digital governance tools. Nice cites two new high-capacity electric bus lines, ensuring that 90% of passengers travel on carbon-free transport. Madrid met EU air quality standards for the third consecutive year, demonstrating that economic growth and sustainability can go hand in hand. Tampere led Finland's 10 largest cities in signing a biodiversity protection commitment, while Athens implemented new climate adaptation measures to protect residents from extreme weather events. Malaga successfully responded to severe flooding, thanks in part to advanced planning and cross-government coordination. These examples show what it means to deliver climate action – and how mayors are driving change.

Tackling the housing crisis and protecting social inclusion has been a source of realisation for many mayors. Mayors in cities such as Florence, Barcelona, and Lisbon have launched major housing plans to improve affordability and social inclusion. For example, Florence's mayor introduced a €115 million housing plan benefitting 12,000 residents while integrating climate-friendly solutions. Athens implemented zero municipal taxes for energy-poor households, setting a European precedent for energy justice. Budapest introduced free mobile health screenings for thousands of residents. Zagreb successfully remunicipalised its wastewater management, ensuring lower costs and better public service control.

Delivering major infrastructure and mobility projects has been the key achievement for several city leaders. Dortmund's mayor attracted record investment for public infrastructure, making the city match-ready for UEFA Euro 2024. Vantaa secured funding for a new light rail system, improving connectivity across the city. In Nicosia, a successful municipal merger across utility companies ensured uninterrupted core services, demonstrating the importance of local governance reform.

Strengthening democracy, civic engagement, and social cohesion is another major success for mayors in 2024. In a year of political uncertainty, city leaders have reinforced democracy and citizen participation. Munich's mayor led mass pro-democracy demonstrations, while Vienna was named European Capital of Democracy, further strengthening its civic engagement initiatives. Białystok's

mayor won re-election for a record fifth term, demonstrating strong public trust. Istanbul introduced the 'Emekli Evi' programme, which helps elderly residents stay socially active and engaged. Irpin focused on transparent and efficient post-war reconstruction, earning global trust and support. These efforts highlight the critical role of mayors in safeguarding democratic values and promoting trust in society.

Transforming cities into global hubs for innovation and science is one of the standout achievements of 2024. Several city leaders have positioned their cities as connectors and leaders in research, entrepreneurship, and urban transformation. Katowice hosted the EuroScience Open Forum 2024, attracting over 270,000 participants, making it one of the largest science events in Europe. Braga was recognised as a European Rising Innovative City, while

Cluj-Napoca strengthened its innovation economy, ensuring better access to funding for startups and impact-driven solutions. Ghent's mayor successfully launched the Wintercircus Tech Hub, turning it into a state-of-the-art research and innovation space. These efforts are helping European cities become global powerhouses for knowledge, technology, and competitiveness.

The achievements of 2024 demonstrate that mayors are at the heart of European transformation. Their leadership has been critical in innovation, housing, sustainability, democracy, and mobility - proving that cities are engines of progress. Their successes also highlight the need for stronger recognition at the EU level, ensuring that mayors have the funding, autonomy, and political support needed to continue driving change.



How mayors expect the EU to support them in meeting their priorities

A recurring theme among responses is the need for direct EU funding to go to cities rather than passing through national or regional governments. In their reflections, mayors say that they are closest to their residents and are best positioned to implement EU policies effectively, yet they often lack the financial autonomy to do so. Specific proposals from mayors include dedicated EU urban funds for priorities like housing, climate action and mobility, reducing bureaucratic barriers to access EU funding and making processes less complex, ensuring urban funding instruments like EU Missions and the EU Innovative Actions continue, and guaranteeing that mid-sized cities receive fair access to funding, not just capitals. With discussions on the EU budget for 2028-2034 entering a crucial phase, mayors are working both nationally and at the EU level to ensure their experiences and ideas are considered.

Mayors highlight the fragmentation of the current EU urban policy landscape, which makes it difficult to navigate and align efforts. There is a strong call for a comprehensive EU strategy for cities, replacing disconnected initiatives, more systematic and structured multi-level governance, ensuring cities are formally included in EU decision-making, and a stronger focus and coordination in the European Parliament to champion urban issues. The newly announced policy agenda for cities that the European Commission is working on seems to be going in this direction.

Many cities cite the housing crisis as a critical challenge and want a dedicated EU housing fund to support affordable and social housing, flexible financing models, including public-private partnerships for housing, technical assistance for

innovative housing solutions like modular and sustainable buildings, and urban infrastructure investment, particularly in transport, water systems, and energy efficiency. To mayors, the forthcoming European Affordable Housing Plan represents a unique opportunity to work with the EU to address this.

Many cities also request more funding for local climate-neutrality projects, including urban greening, energy-efficient buildings, and low-emission mobility, dedicated support for smaller and mid-sized cities to ensure the green transition is equitable, fast-track access to climate financing with reduced bureaucratic hurdles, and reinforce integration of local climate efforts in EU funding frameworks.

Mayors emphasise that urban economies drive national and European growth, yet they often struggle with underinvestment. Proposals include better integration of cities in EU industrial and economic strategies, targeted funding for local business hubs, innovation clusters, and digital transformation, and ensuring local governments can directly access EU funds for economic development projects.

City leaders also cite less restrictive EU regulations, including higher thresholds in EU public procurement rules, allowing for more flexibility, reduction of administrative burdens tied to EU funding and regulations, and more autonomy in designing policies to manage urban space, air quality, and green transition measures.

Several city leaders also propose EU-supported cross-border cooperation projects to address shared challenges, earmarked funding for city networks to enhance learning and collaboration, and stronger legislative frameworks to make cooperation across regions and borders easier.

Cities also emphasise their role in addressing security challenges, particularly in cybersecurity to ensure critical urban services are protected; crisis resilience to support cities recovering from conflicts or natural disasters; and public safety and crime prevention, particularly in urban areas facing social tensions.



Eurocities barometer – mayors' edition

The Eurocities barometer tests mayors' pulse on a range of trending topics. Based on direct insights from the 86 mayors who responded, this edition explores key themes such as trust in government, economic outlook, democratic satisfaction, fiscal autonomy, and access to EU funding.

Mayoral trust in other levels of government

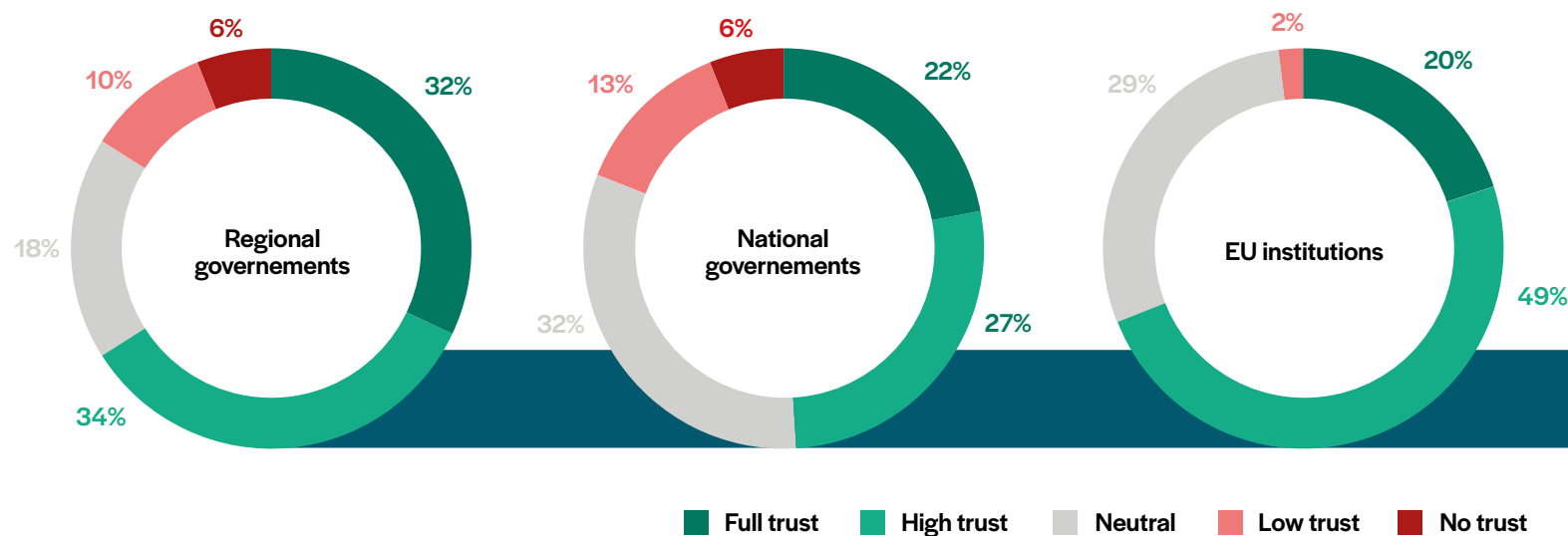
This year's survey highlights clear differences in how European mayors perceive regional, national, and EU institutions. Overall, national governments receive the lowest trust, while regional governments and the EU level receive higher levels of trust. Lack of trust with central government is a trend that is widespread across Europe, and that is directly linked with a centralisation trend and a perception of lost autonomy from local governments. Many mayors cite frustration with top-down decision-making,

lack of municipal autonomy, and financial constraints imposed by central authorities. Some report higher levels of trust, often due to strong national-local alignment on issues like infrastructure, housing, or climate action.

Trust in the EU institutions is relatively strong but varies depending on the extent of city engagement in European programmes. Many cities value EU funding and policy alignment, seeing the EU as an important partner in areas such as climate

action, mobility, and urban development. Cities that have better access to EU funds report higher trust. The ones that have more neutral or lower trust are the ones noting challenges of administrative complexity or low reactivity of EU decision-making. However, no city reports a complete lack of trust in the EU, suggesting that while frustrations exist, the EU is still viewed as a credible and necessary actor in urban governance, and an actor that cities expect to have more direct relations with that are not mediated by national governments.

Trust levels in different levels of government

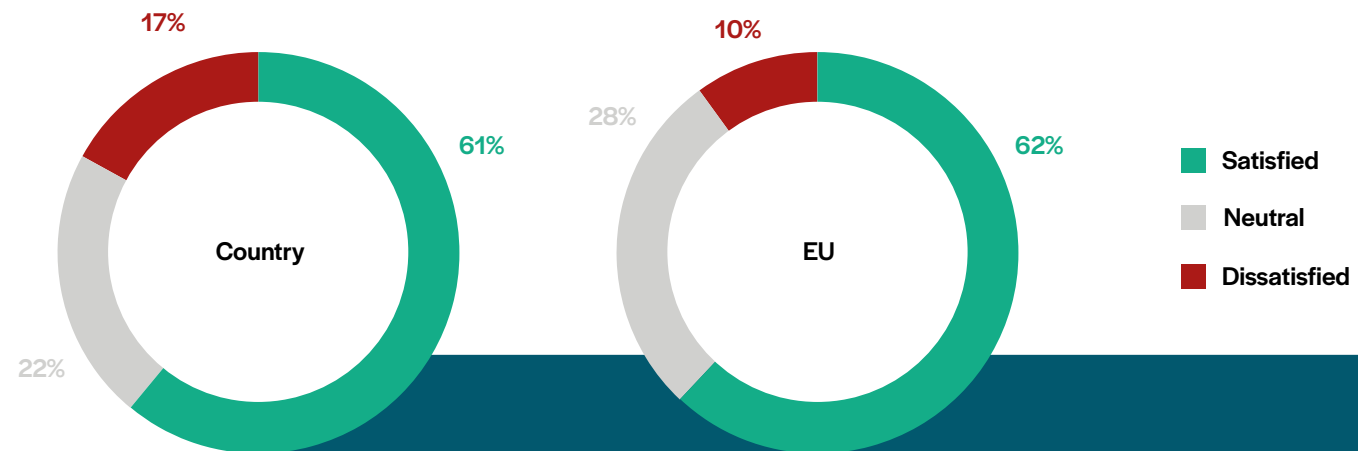


Confidence in democracy

Across Europe, mayors are upholding democracy, acting as the closest level of government to citizens and navigating political dynamics at both the national and EU levels. Their perspective on democratic governance offers a critical insight into the state of democracy in Europe. The responses reveal a mixed but hopeful picture: while confidence in the EU's democratic system remains relatively strong, many mayors express deep concerns about the functioning of democracy at the national level. This contrast highlights the need to bridge the gap between national governments, EU institutions, and the cities that are at the heart of European democracy.

Geographic patterns reveal important trends. Mayors in Nordic and Western European cities tend to express moderate to high satisfaction with democracy, whereas some Central and Eastern European cities report strong concerns. Unsurprisingly, cities that report highest concern are those that represent different political parties to that of their national government. In Ukraine, where cities such as Zhytomyr and Irpin have been at the forefront of democratic resilience, mayors

Mayor satisfaction with democracy in country vs. EU



rate EU democracy highly, reflecting the importance of the EU's role in supporting their stability and governance.

A key finding from the survey is that mayors generally see the EU's democratic model as stronger and more stable than their national governments. Many city leaders acknowledge the EU's role in providing long-term vision, political stability, and institutional reliability.

At the national level, concerns over democracy are driven by political instability, budgetary centralisation, and limited influence of cities in national decision-making.

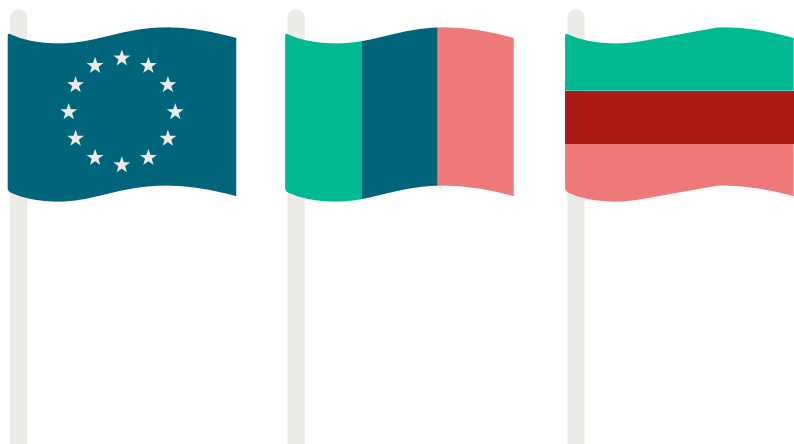
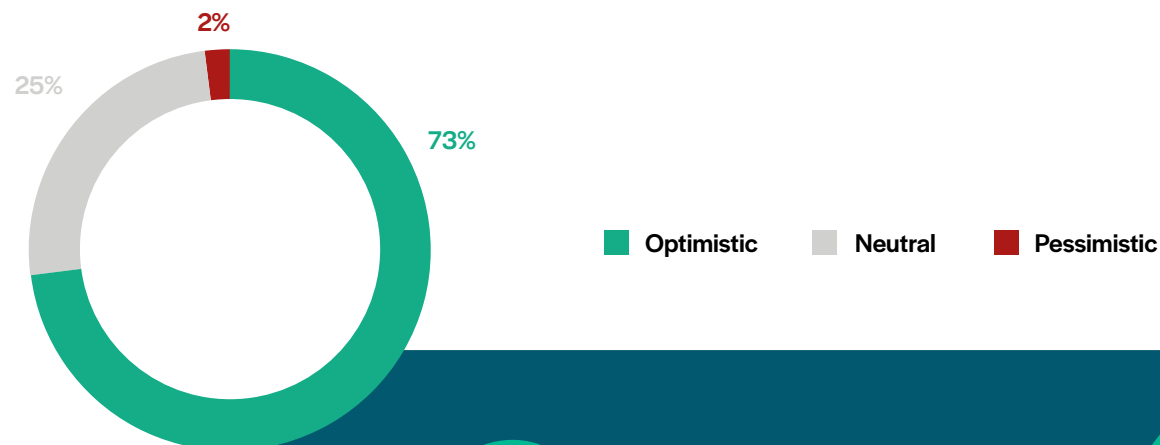
These findings point to a pressing need to reinforce democracy at all levels of governance. While many mayors express optimism about the EU's democratic system, there is a clear demand for deeper

local engagement and stronger urban participation in European policymaking. Addressing the concerns raised at the national level - particularly around centralisation, political instability, and financial constraints - will be essential to ensuring that cities can continue to act as pillars of democratic governance across Europe.

Sentiment about the future of the EU

The responses from mayors across European cities indicate a generally positive outlook on the future of the European Union. Using a sentiment scale from 0 to 10, where 0-3 reflects pessimism, 4-6 indicates a neutral stance, and 7-10 represents optimism, the results show that the vast majority of mayors remain confident in the EU's trajectory. It is not surprising that mayors call for a strong alliance with EU institutions backed by an ambitious policy agenda for cities.

Optimism about the future of the EU among mayors



The overall sentiment is largely optimistic, with 73% of mayors rating their optimism between seven and ten. Neutral perspectives account for 25%, while pessimism remains rare, with only 2% of mayors expressing low confidence in the EU's future. These results suggest that city leaders continue to see the EU as a key partner for urban progress, investment, and governance, despite existing challenges.

Cities in Western and Southern Europe tend to be the most optimistic while cities in Eastern and Northern Europe tend to be less so. Several key factors appear to shape mayoral optimism. Cities that are heavily involved in EU-funded projects and economic integration tend to report higher levels of confidence. Political alignment and decentralisation also plays a role.

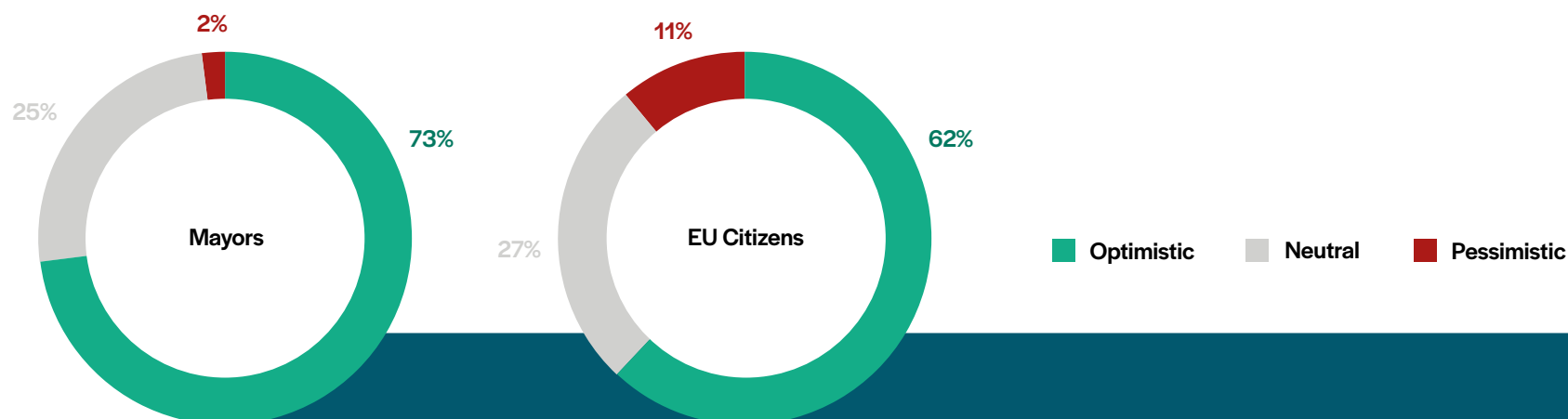
Comparing these findings to broader public sentiment, mayors tend to be more optimistic than EU citizens. According to recent Eurobarometer data, 62% of

European citizens express optimism about the EU's future, compared to 73% of mayors in this survey. While 11% of citizens report pessimism, only 2% of mayors share the same view. The gap between citizen and mayoral sentiment may be explained by the fact that mayors work directly with EU institutions, funding programmes, and city partnerships, giving them a more pragmatic and engaged perspective on European cooperation. In contrast, citizens may view the EU through the lens of national politics or media narratives, which can create a more sceptical outlook.

The correlation between trust in the EU and optimism about its future is statistically significant suggesting a moderate positive relationship: mayors who have higher trust in EU institutions are more likely to be optimistic about its future. This reinforces the idea that institutional trust plays a key role in shaping mayoral perspectives on the EU's future.

Looking ahead, these findings suggest that mayors see the EU as a critical force for urban progress, investment, and governance. Mayors' strong optimism highlights their role as key advocates for European cooperation and integration, ensuring that cities continue to be central actors in shaping the EU's long-term resilience and development.

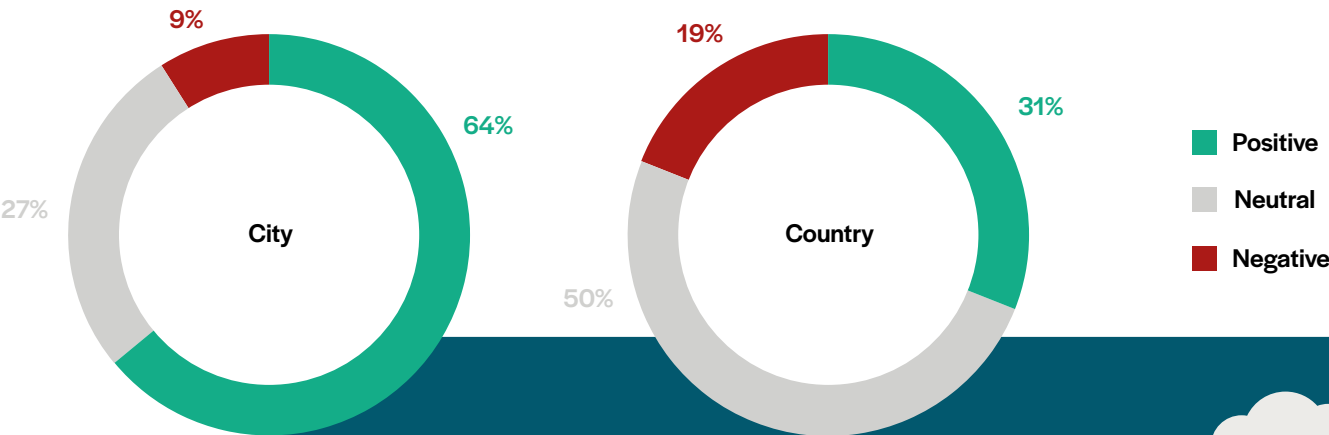
Optimism about the future of the EU: Mayors vs. EU citizens



Economic outlook for 2025

The economic sentiment among mayors highlights a clear divide between how they perceive their local economies and the broader national economic landscape. While the majority of mayors remain confident about their city's economic future, their views on national economies are more neutral or negative.

Distribution of economic outlook: city vs. Country



When rating their local economies, 64% of mayors gave high scores between seven and ten, reflecting strong optimism and a positive outlook. Many city leaders see urban economies as resilient, innovation-driven, and better positioned to navigate economic challenges than their national counterparts. In contrast, when assessing their national economies, responses were more cautious, with around half of mayors (50%) giving scores between four and six, indicating uncertainty and a more neutral outcome. A smaller number (19%) rated their national economies below four, pointing to concerns about economic stagnation, inflation, and budgetary constraints.

This divide is particularly evident in cities that report strong local economic confidence despite national economic pessimism. These cities are key economic engines, benefitting from strong local investment, innovation hubs, and urban-led policies that stimulate growth. However, they remain concerned about wider economic conditions, such as national-level policy stagnation, inflationary pressures, and slow fiscal reforms.

In contrast, some cities report aligned economic sentiment, where mayors rate both their local and national economy with similar scores. This suggests a more stable economic outlook, where national policies support local development, and macroeconomic conditions remain favourable. Cities such as Barcelona, Braga, Vienna, Gdansk, and Essen fall into this category, reflecting perceptions of both strong local governance and national economic stability.

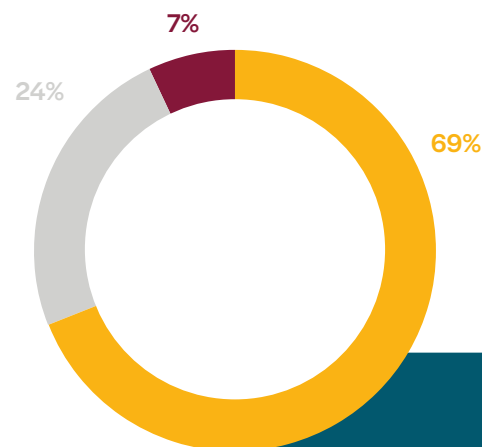
A smaller group of cities express pessimism about both their local and national economies. These cities face significant financial pressures, including economic stagnation, fiscal constraints, or external shocks such as war or climate hazards, inflation, or the decline of key industries.

Looking at broader economic perspectives, mayors' trust in the economy remains strong. However, when compared to similar surveys of business leaders, there is a notable divergence in economic sentiment. While mayors focus on city-level resilience and investment, business leaders tend to express more caution about Europe's overall competitiveness and economic outlook.

Where mayors overwhelmingly see the EU as a source of investment and financial support, business leaders are more likely to highlight regulatory burdens and concerns over global trade competitiveness. This contrast suggests that while cities remain confident in their ability to drive economic success through local initiatives, broader European market dynamics and regulatory challenges shape a more cautious business perspective.

Multi-level cooperation and decentralisation

Effective governance in Europe relies on strong cooperation between local, national, and EU institutions. This year we explored mayors' perceptions of cooperation across government levels, challenges in accessing funds, the degree of fiscal autonomy cities have, and their expectations from the EU on decentralisation.



Multi-level cooperation across government levels

Improved Stayed the same Declined

Perception of cooperation across government levels

When asked about the cooperation with other levels of government over the past 10 years, nearly seven in ten mayors (69%) across Europe report an improvement in multi-level cooperation, reflecting a growing recognition of the importance of collaborative governance to address urban challenges. At the EU level, progress is evident through initiatives like the Urban

Agenda for the EU and the enhanced urban dimension of Cohesion Policy. Nationally, as the OECD reported, governments are aligning urban actions through national urban policies, helping to create a more coordinated approach to urban development. Generally, there has been a broader acknowledgement of the crucial role cities play in tackling major challenges such as climate change, migration, and sustainable urban development.

However, despite these advances, there remains substantial room for improvement. While many cities have seen positive developments, a small but notable portion of mayors (7%) feel that cooperation has either declined or stagnated. These critical voices often come from regions where centralisation has increased, leading to challenges in engaging with national governments.

Access to funds from other government levels

Mayors' perspectives on accessing funds from regional, national, and EU sources reveal major disparities in financial support for cities.

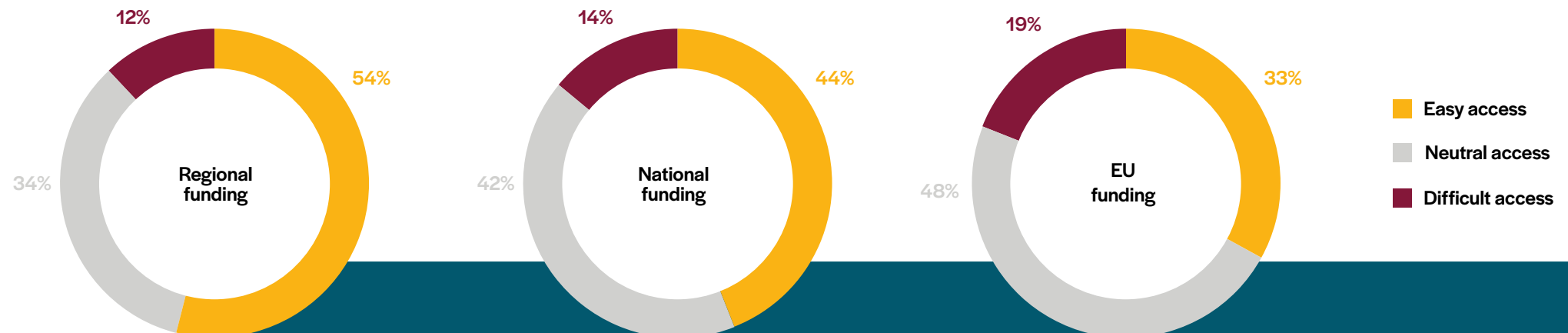
EU funding appears to be the most challenging financial source for cities to access. Only 33% of cities report ease in securing direct EU funding, with many citing complex application processes, slow

approval mechanisms, and dependence on national intermediaries. Cities that have benefitted from direct forms of EU funding – either those who perceived easier access to Cohesion Policy and have higher envelopes or those who manage to secure direct funds through Horizon Europe or the European Urban Initiative - tend to have more positive experiences.

Access to national funding presents a more complex picture. Some mayors highlight political considerations as a barrier, with funding decisions sometimes influenced by national political dynamics rather than local needs.

Overall, regional funding is the most accessible for cities, with nearly half of respondents rating it as easy to obtain. The findings reinforce the need for more streamlined and direct financial mechanisms that allow cities to access funding efficiently.

City access to funding at regional, national and EU levels



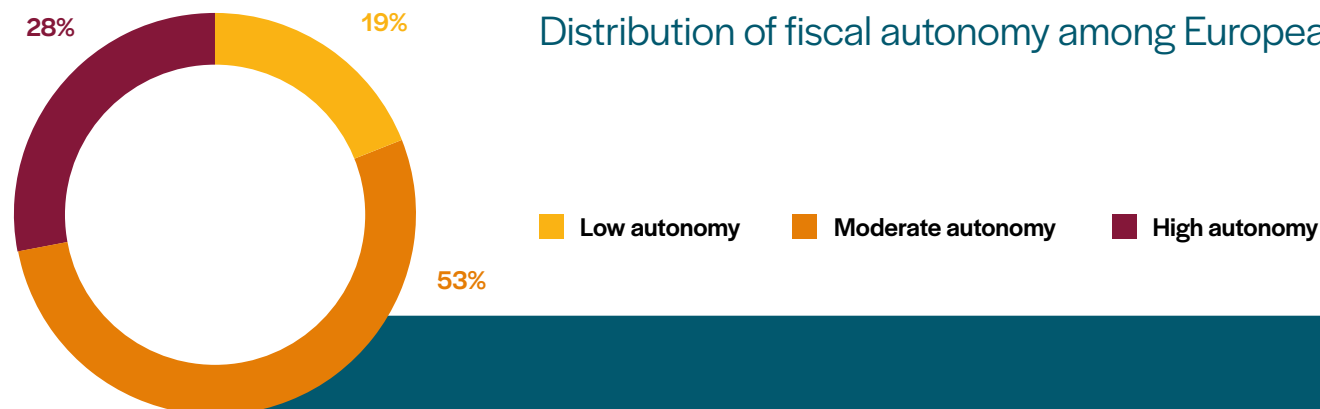
Fiscal autonomy in EU cities

Mayors' perspectives on fiscal autonomy highlight major disparities in the financial independence of European cities. While some cities report strong control over their budgets, taxation, and investment decisions, many remain financially constrained, relying heavily on national and regional governments for funding. These limitations affect cities' ability to implement long-term strategies and respond effectively to local challenges. Only 28% of mayors feel their city has high fiscal autonomy (scores 7–10), demonstrating that most local governments remain financially constrained in delivering strategic priorities.

This small group of cities, especially those with strong decentralised governance structures, such as in Switzerland, Germany, and the Nordic countries, indicate that they have the necessary fiscal tools to meet their objectives effectively. Their financial independence enables them to take decisive action on housing, infrastructure, and climate policies without waiting for approval or funding from higher levels of government.

However, nearly 20% of mayors (16 out of 86) report low fiscal autonomy (scores 0–3), highlighting that many cities struggle to collect and manage their own revenues effectively. These cities face severe restrictions on taxation powers, limited ability to raise independent revenue, and heavy dependence on national financial transfers that often come with strict conditions. Many mayors in this category express frustration with national policies that centralise financial control, preventing cities from responding flexibly to local

Distribution of fiscal autonomy among European cities



needs. Some also highlight that national budget cuts or shifting political priorities have led to sudden reductions in municipal resources, further weakening their ability to invest in infrastructure, housing, and essential services.

Even among mayors with high optimism for the EU's future, only a minority believe their city has the fiscal tools to implement key policies effectively.

The link between fiscal autonomy and trust in higher levels of government is also evident. Cities with low fiscal independence tend to have lower trust in their national governments. Mayors with high fiscal autonomy tend to be more optimistic about their city's economic future and about the EU's long-term prospects.



Expectations from the EU on promoting decentralisation

When asked what the EU should do to promote decentralisation, mayors across Europe are calling for the EU to take a stronger role in promoting it, ensuring that cities have the financial, political, and administrative tools needed to effectively address urban challenges.

Their expectations focus on securing direct funding, enhancing their role in EU decision-making, simplifying access to financial resources, and strengthening multi-level governance structures. Interestingly, these expectations are similar to the messages they put forward when asked how the EU could help them meet their priorities, suggesting that decentralising power and creating direct links with the EU is the most important reason.

Beyond what has already been mentioned, cities are also asking for legal and structural reforms that increase their fiscal autonomy. Many local leaders argue that their financial dependency on national governments limits their ability to plan and invest effectively. Mayors urge the EU to push for reforms that allow cities to retain more revenue from local taxation, such as property levies or tourism taxes, giving them greater control over their own budgets.

Government innovation and capacity-building are also high on the agenda and perceived as a way to boost decentralisation with mayors calling for dedicated EU programmes to support digital governance, smart city solutions, and training initiatives for local officials, equipping cities with the expertise needed to navigate future challenges.

For mayors, the message is clear: decentralisation is not just about shifting responsibilities - it is about ensuring that cities have the power, funding, and voice they need to drive Europe's future.



Empowering EU cities for a resilient and thriving future

Raffaele Fitto, Executive Vice-President for Cohesion and Reforms, European Commission

Today, 75% of the EU population lives in cities. The wellbeing of our Union depends on vibrant, sustainable urban areas that can tackle current challenges and prepare for the future. Cities must deliver quality public services and foster environments where citizens and businesses thrive through affordable housing, modern infrastructure, clean water, education, healthcare, and sustainable transport.

As Executive Vice-President for Cohesion and Reforms, I am working closely with my fellow Commissioners to ensure EU policies reflect the territorial dimension and address urban needs directly.

Cohesion Policy is a key driver of competitiveness, resilience, and convergence. It has proven its value by supporting growth and jobs and reacting swiftly to major crises, from the pandemic to Russia's war of aggression against Ukraine and the energy shock.

Between 2021 and 2027, cities are managing over €24 billion in EU investments. The European Urban Initiative promotes innovation, capacity building, and knowledge sharing, with more than 90 cities already benefitting. The projects support actions in areas such as the New European Bauhaus, sustainable tourism, and revitalisation in shrinking cities. URBACT strengthens transnational cooperation and backs cities in candidate countries and beyond.

Affordable housing is a political priority. It affects all income levels and regions. Cohesion programmes are investing €7.5 billion in housing, rising to €10.5 billion with national contributions. But this is not enough. I am committed to encouraging member states to double this figure and to mobilising private finance to meet our shared objectives.

To align with evolving needs, I am leading the modernisation of Cohesion Policy. This reform will better reflect new priorities and cities will be among the main beneficiaries, with more flexible and targeted support.

The upcoming Agenda for Cities will bring greater coherence to EU urban policy. It will build on tools like the European Urban Initiative and simplify access to funding, expertise, and partnerships for cities of all sizes.

Crucially, the Agenda will amplify the voice of cities in EU policymaking. Local governments are closest to citizens and know how policies play out on the ground. Their insights are essential, both to improve policy design and to help implement EU priorities effectively.

By working together — European institutions, member states, and local authorities — we will shape the cities of the future, ensuring they remain engines of progress and wellbeing for all our citizens.



Our Duty Is to Be the Optimists of Europe

Kata Tüttö, President of the European Committee of the Regions

The world today feels like a turning kaleidoscope – what once seemed stable is now in motion. Familiar patterns break apart. The future feels fragmented, unpredictable. But change is not only destruction – it is also creation. From disorder, new forms emerge. From broken pieces, new patterns take shape.

The question for us as leaders, at every level, is: how do we shape this transformation? And how do we reduce the suffering that so often accompanies it?

Looking back, it seems the past five years - marked by crisis after crisis – were not just a series of disruptions, but a training season. A harsh, relentless preparation for where we find ourselves in 2025, and for what is yet to come. And now, it is time for us local leaders to push ourselves to the limit. To voluntarily step into responsibility, cutting a path through the growing chaos.

Europe's greatest strength lies in being grounded in its local realities. When policies lose this grounding – when they become too complex, too abstract, too distant - trust erodes. And in times of growing distrust, the responsibility on local leaders increases. We must bring stability where there is uncertainty, and connection where there is fragmentation.

The role of the European Committee of the Regions is to connect European decision-making with the lived experiences of Europe's cities, regions, and local communities – from mountain villages to industrial hubs, from coastal towns to rural farmlands. We digest and translate policy into something real. We bring local leadership, innovation, and common sense into the European process.

But what tools do we have?

Cohesion Policy is one of the EU's most powerful stabilising tools – economically, socially, and territorially. It is the long-term glue that holds us together. But like all powerful tools, it needs constant calibration - guided by a sensitive signaling mechanism that comes from cities and regions.

If this tool becomes too bureaucratic, too rigid, too centralised - it fails.

Cohesion must flow – and it must flow in a stable, reliable way. Like blood in a living body, it must reach every part – the brain, the heart, the lungs, and the peripheries. Although resources exist, too often, the system is starving. The flow is blocked – by complex procedures, by lack of co-financing, by slow or rigid systems. Our task is to identify and remove those blockages.

That is how I evaluate any major EU policy – whether it's about competitiveness, economic security, or innovation. I ask: will this improve the condition of the regions with the weakest circulation? Or will it make things worse?

It is tempting to believe that some policies are universally good. But every policy has a cost. Benefits and burdens are rarely distributed evenly. That's why local and regional voices must be involved from the beginning – not as an afterthought.

We welcome the increased flexibility and the direct tools that allow us to invest in what matters most on the ground: affordable housing, water resilience, energy security, and local preparedness in times of crisis – including defence and all dimensions of security.

But no one should forget – even for a moment – that Cohesion Policy is not just a financial instrument. It is the structural investment that makes resilience possible in the first place.

Cohesion Policy must not become just an ambulance fund to patch the side effects of shifting priorities. It must remain the backbone of a strong, united, and balanced Europe. Because every time we take from it to respond to short-term pressures, it's like pulling bricks from the foundation to reinforce the roof - sooner or later, the whole structure becomes unstable.

Local leadership is Europe's untapped strength. And it is time to unlock it.

When the future feels uncertain, optimists are the ones who do everything in their power to shape it for the better. That is our duty – to be the optimists of Europe. To step forward. To take responsibility. To stay connected – to the ground, and to fellow local leaders across Europe. To bring innovation, courage, and common sense into decision-making.

By staying connected as local leaders, we strengthen the fabric of the European Union.

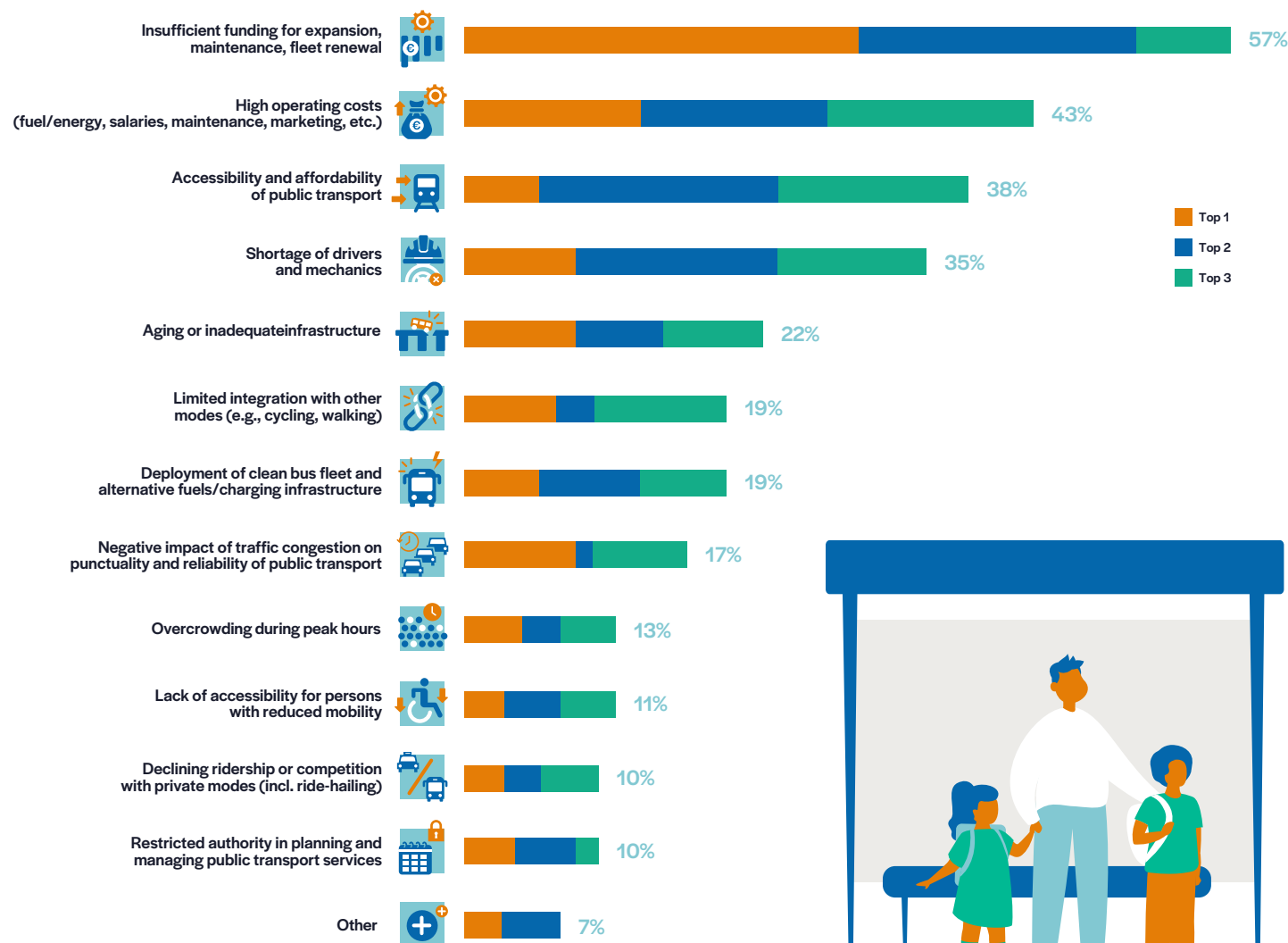
Cities making a difference



The state of public transport in European cities

With the growing importance of sustainable mobility and public transport in our cities, this year we decided to go a bit deeper, to take the pulse of our mayors on the state of public transport in their cities, asking them questions about their top challenges, top priorities, and what actions they are working on.

Public transport challenges: breakdown of sections



Top challenges

The survey responses from European mayors highlight critical challenges facing public transport systems across cities. The data reveal a strong focus on financial constraints, infrastructure limitations, and changing mobility patterns. The most commonly cited challenge, mentioned by 57% of mayors, is insufficient funding for expansion, maintenance, and fleet renewal. Many cities struggle to modernise their transport networks due to limited budgets and dependency on national and EU funding. This highlights a lack of national resources for long-term investments to sustain quality service, and for some a strong reliance on EU level financial instruments to promote modernisation efforts.

High operating costs, including fuel prices, staff salaries, and maintenance, emerge as the second most pressing concern, affecting 43% of cities. This issue is particularly evident in cities with extensive transit networks that require significant investment to remain efficient. Inflation and the surge in the cost of living are making this a significant challenge for many cities, especially as fiscal transfers from other levels of government do not keep up with rising costs.

Accessibility and affordability are also identified as growing issues, with 38% of mayors identifying these as major concerns. Cities struggle to balance financial sustainability while ensuring that public transport remains inclusive for all residents. Rising costs are putting pressure on the fare structures, while at the same time making it difficult to maintain low fares and improve service coverage.

A workforce crisis is also affecting public transport systems, with 35% of mayors reporting shortages of drivers and mechanics to be a major challenge. Cities struggle to recruit and retain skilled workers, leading to service disruptions and increased operational costs. This issue is particularly acute in Nordic and Western European cities, where competition from the private sector and demographic shifts have worsened the shortage.

Aging or inadequate infrastructure remains a significant barrier to improving public transport for 22% of mayors. Many European cities operate transport networks that are in urgent need of modernisation, particularly in rail and metro systems. Cities highlight the need for infrastructure upgrades, while some also report that existing bottlenecks are limiting service improvements.

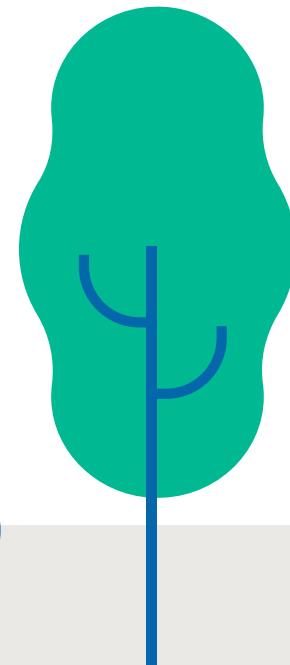
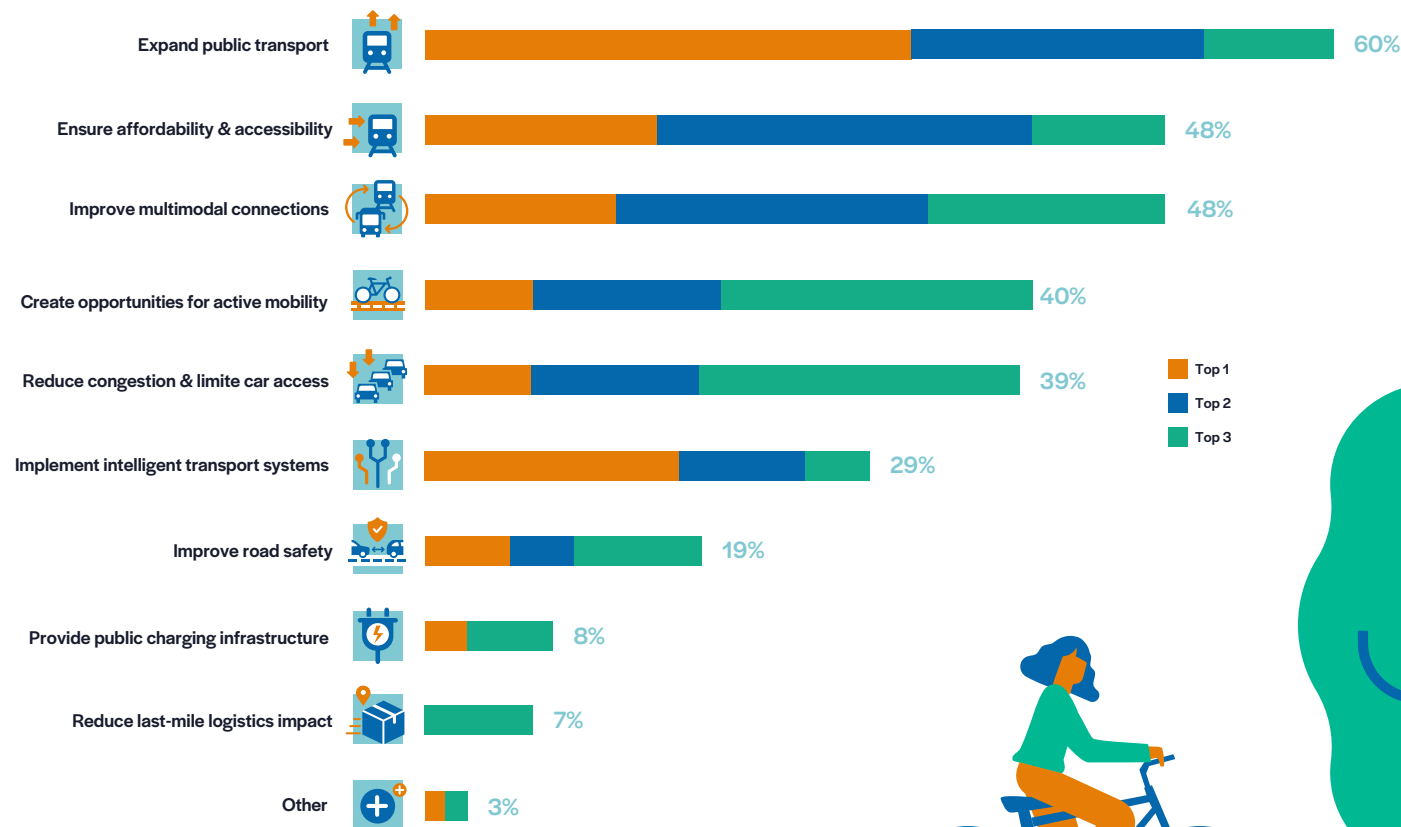
In addition to these primary concerns, 19% of cities struggle with integrating public transport with other modes of transport, such as cycling and walking, making seamless multimodal mobility difficult. 13% of cities also cite traffic congestion as a major issue, significantly impacting service reliability in urban areas. Ride-hailing services and declining ridership pose an emerging challenge, affecting 10% of cities where car-sharing and private mobility options are reducing public transport use.

Without bold investments, Europe's urban mobility risks stagnation, with worsening service quality, increasing congestion, and higher emissions threatening long-term sustainability. Mayors are clear in their message: without stronger financial and policy support, cities will struggle to maintain efficient, accessible, and climate-friendly public transport networks.

Top priorities

With growing populations, increasing congestion, and the pressing need for climate action, cities are prioritising major shifts in how people move. The results of the survey show a clear consensus on key areas for investment, and highlight regional differences in how cities are tackling mobility challenges.

Top mobility priorities in European cities



The single biggest priority for mayors is expanding public transport networks and services, with 60% of mayors ranking it among their top three priorities. This underlines the urgency of improving metro, tram, and bus networks. Cities with well-established transit systems are working to expand high-capacity services, while others are focused on extending coverage to underserved areas. Whether it's new metro lines, bus corridors, or better service frequency, the message is clear: cities cannot meet mobility demands without major investment in public transport. When asked to specify current projects, different things were highlighted: Vienna for example, is pressing ahead with an ambitious metro expansion plan running until 2035, ensuring the city's rapid transit network can meet growing demand. Toulouse, meanwhile, is making history with the largest mobility investment outside Paris, committing €4 billion to strengthen public transport and cycling infrastructure.

Alongside expansion, ensuring public transport remains accessible and affordable is a major concern for cities, ranking as the second-highest priority. As mentioned in their top challenges, cities are increasingly struggling to balance rising operational costs with the need to keep fares low. Cities are prioritising policies to prevent fare hikes, and some are embedding affordability into broader multimodal transport solutions. Across Southern and Eastern Europe, financial constraints and social equity concerns are making affordability a core element of sustainable urban mobility planning.

Beyond improving public transport itself, mayors are focused on making mobility systems more integrated. This means better multimodal connections, ensuring that public transport, cycling, walking, and shared mobility services work together seamlessly. Cities are leading efforts to create multimodal hubs and park-and-ride systems, while also improving public transport links to ports and rail networks. The emphasis on integration reflects a growing recognition that transport networks need to be designed as a whole, not just as individual modes. The mayor of Bristol explains that his city is pioneering its first Liveable Neighbourhoods, prioritising walking,

cycling, and public transport access in residential areas. Malaga's mayor highlights how she is expanding its dedicated public transport lanes and park-and-ride facilities to improve modal interchanges.

Creating opportunities for active mobility ranks as a fourth top priority, showing that mayors are keen to significantly invest energies and resources in cycling infrastructure and making walkability a core tenet of their urban development strategies. This can reduce carbon emissions and improve health and well-being. Mayors give multiple examples of actions they are prioritising: Lyon Metropole is rolling out its 'Voies Lyonnaises' network, a transformative cycling project that will connect different parts of the metropolitan area with safe, high-quality bike lanes. Oulu continues to set international standards for year-round cycling infrastructure, while Netwerkstad Twente in the Netherlands has been recognised as 'Best Cycling City' and is now developing cycle highways to support long-distance commuting. Ghent is reinforcing its position as a leader in active mobility by integrating cycling and pedestrian infrastructure with vehicle access regulations.

Reducing congestion and limiting car access ranks as the fifth-highest priority, with several cities implementing policies to curb traffic in urban centres. Mayors are leading the way with low-emission zones, circulation plans, and parking restrictions, as well as taking action to limit car use in historic districts. The push to reduce congestion aligns with European climate targets and efforts to reclaim urban space for pedestrians, cyclists, and public transport.

Other priorities show a growing focus on technological and environmental challenges. A few mayors are prioritising digital transport solutions such as real-time route planners, AI-driven traffic management, and smart traffic lights, leading the push for Intelligent Transport Systems. Public charging infrastructure is also a priority for some. Road safety, a widespread priority in all cities, is among the top priorities for cities where policymakers are tackling pedestrian and cyclist safety through new urban design measures such as speed limits in high density areas. Finally, some mayors highlight how they are targeting the environmental and safety impacts of last-mile logistics,

integrating freight solutions into broader mobility planning. For example, Munich has placed sustainable freight logistics at the centre of its mobility strategy, while Turku is developing a Sustainable Urban Logistics Plan to optimise last-mile delivery

Regional trends reveal how different urban contexts shape mobility priorities. Western and Central European cities are doubling down on high-capacity public transport and multimodal networks, while Eastern European cities seem to be focused on affordability and expanding basic coverage. Nordic cities are leading the way in electrification and smart transport, while Southern European cities are prioritising congestion reduction and reclaiming public space for pedestrians.

For European mayors, the direction of urban mobility is clear. The challenge now is turning these priorities into reality, and that will depend on securing the right investments, aligning European and national funding with city needs, and accelerating policy changes that empower local governments.



Cities efforts to achieve sustainable mobility transitions

By Charlotte Halpern, Director of the Institute for Environmental Transformations, Sciences Po

Sustainable mobility transitions constitute a major challenge for cities. Despite major technological developments in electric vehicles, hydrogen power, and mass transit digitisation, the transport sector still accounts for a 25% (and growing) share of Europe's GHG emissions. An estimated one quarter of which are accountable to urban areas alone¹.

It is becoming increasingly clear that without a step-change in approaching the role of urban transportation in carbon reduction and climate change mitigation, the EU will miss its 2050 net-zero targets to cut transportation GHG emissions by 90%.

This requires looking beyond technological fixes and overcoming deficiencies in governance capacities to plan and deliver sustainable mobility transitions. This is particularly the case for small- and medium-sized cities, to which limited attention has been given in the past in national and European policy frameworks.

City governments often lack the needed resources, in terms of fragmented funding, data, and human capital to address sustainable mobility transition challenges, especially for public transport, the backbone of sustainable urban mobility. Mayors responding to this year's Eurocities Pulse Mayors Survey voiced particular concern for the challenges facing public transport systems across cities.

¹ European Environment Agency (2022), Greenhouse gas emissions from transport in Europe, <https://www.eea.europa.eu/ims/greenhouse-gas-emissions-from-transport>

57% of mayors cited insufficient funding for expansion, maintenance and fleet renewal as the top challenge. Many cities often depend on other levels of government – national and European – for funding, especially when long term investments are needed to improve service quality. 22% of cities struggle with an aging and inadequate infrastructure, highlighting the need for infrastructure upgrades, particularly in rail and metro systems.

Multiple levels of governance may limit the ability of city authorities to develop and deliver an ambitious sustainable transition agenda. While powers and responsibilities at a local level are shared with regional and national authorities, these higher authorities do not necessarily share with local governments the resources that they require to function. As a consequence, city governments often compete against, rather than cooperate with, different levels of authority in the decision-making process. This creates negative lock-ins. In this regard, 43% of the mayors responding to this year's survey highlighted high operating costs as the second most pressing challenge, whether resulting from fuel and energy prices or from staff salaries and maintenance.

Cities are well placed to identify and target their own mobility reforms in consultation with stakeholders and to address context-specific and path-dependent barriers and opportunities in mobility transformation. Thus, new governance frameworks need to be developed to support them in transforming their cities beyond currently existing paradigms. Responses to this year's Eurocities Pulse Mayors Survey highlighted a number of salient take-aways to achieve this transformation. While the expansion of public transport networks and services is a top priority in 60% of cities, mayors across Europe also make it clear that mobility transitions will need to deliver on wider eco-social outcomes.

First, 48% of mayors declared that public transport should be affordable, and second, 48% highlighted the need for enhanced multimodal connections to improve integration with a wide range of sustainable mobility solutions such as walking, cycling and shared mobility solutions for passengers as well as for logistics. Reducing congestion, limiting car access and supporting active mobility are, in this context, identified as major push and pull drivers for, respectively, 39% and 40% of mayors.

Cities are well placed to take a lead in sustainable mobility transitions. Governance reforms have become unavoidable to accelerate and intensify the shift to sustainable mobility, develop and apply a set of context-specific mobility transition pathways and transform existing infrastructure and networks, while working across sectors and engaging every segment of society.

As national funding options remain limited, European financial mechanisms - as laid out in the European Green Deal and now the Clean Industrial Deal – have been critical for expansion and modernisation efforts. This includes the deployment of clean bus fleets, and alternative fuels and charging infrastructure, which is only considered a top challenge by 19% of respondents.

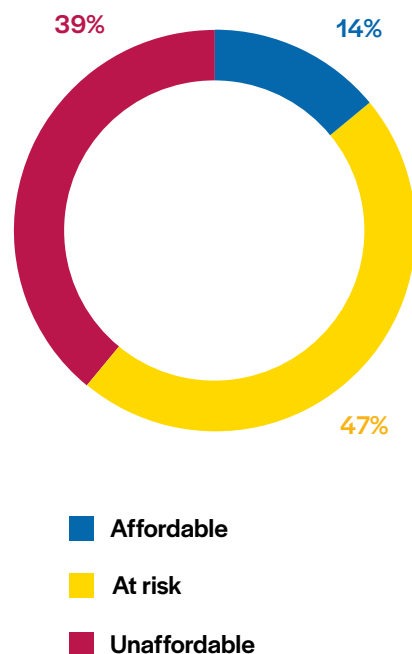
Yet debates about whether this is enough have resurfaced during negotiations about recovery and resilience plans and, recently, the Clean Industrial Deal.

As these policy documents are under the direct management of the European Commission, cities have repeatedly highlighted the need for a more structured dialogue with the EU institutions to overcome implementation gaps resulting from limited capacities being devolved towards cities.

The state of housing affordability in European cities

Europe's housing crisis continues to deepen, with over one in three mayors (39%) now reporting that housing costs are unaffordable. For these cities, average incomes are no longer enough to cover sustainable rent (i.e. a rent that is approximately no more than a third of total income as defined by various EU countries) or mortgage payments, threatening social stability and pushing residents further from urban centres.

Housing affordability in European cities



At the same time, only 14% of cities report that housing remains affordable for their residents. Just one in seven surveyed mayors say their cities offer accessible housing, with scores of seven or higher on the affordability scale. These cities include those that have managed to maintain affordability through strong public housing policies, controlled rent increases, or sustained investment in social housing.

For around half of European cities - 47% - housing affordability remains in a 'moderate' category, meaning it is not yet an acute crisis but remains a growing concern. These cities, including many in Central and Northern Europe, are at risk of slipping into unaffordability if housing prices and rental costs continue to outpace income growth.

The crisis is most severe in **Southern and Western European cities**, where affordability pressures are mounting at an alarming rate. **Barcelona, which reported the most unaffordable housing market**, reports the worst affordability crisis, reflecting Spain's broader housing emergency, where high demand, speculative real estate, and limited new housing supply are pushing prices beyond reach.

Other major metropolitan areas - including Amsterdam and Zurich - scored three or below, firmly placing them in the 'unaffordable' category. Italian cities, including Florence, Rome, and Bologna;

and French urban hubs such as Lyon, Nice, and Marseille, are struggling to keep housing costs under control, particularly as rising mortgage rates and short-term rental platforms accelerate housing shortages.

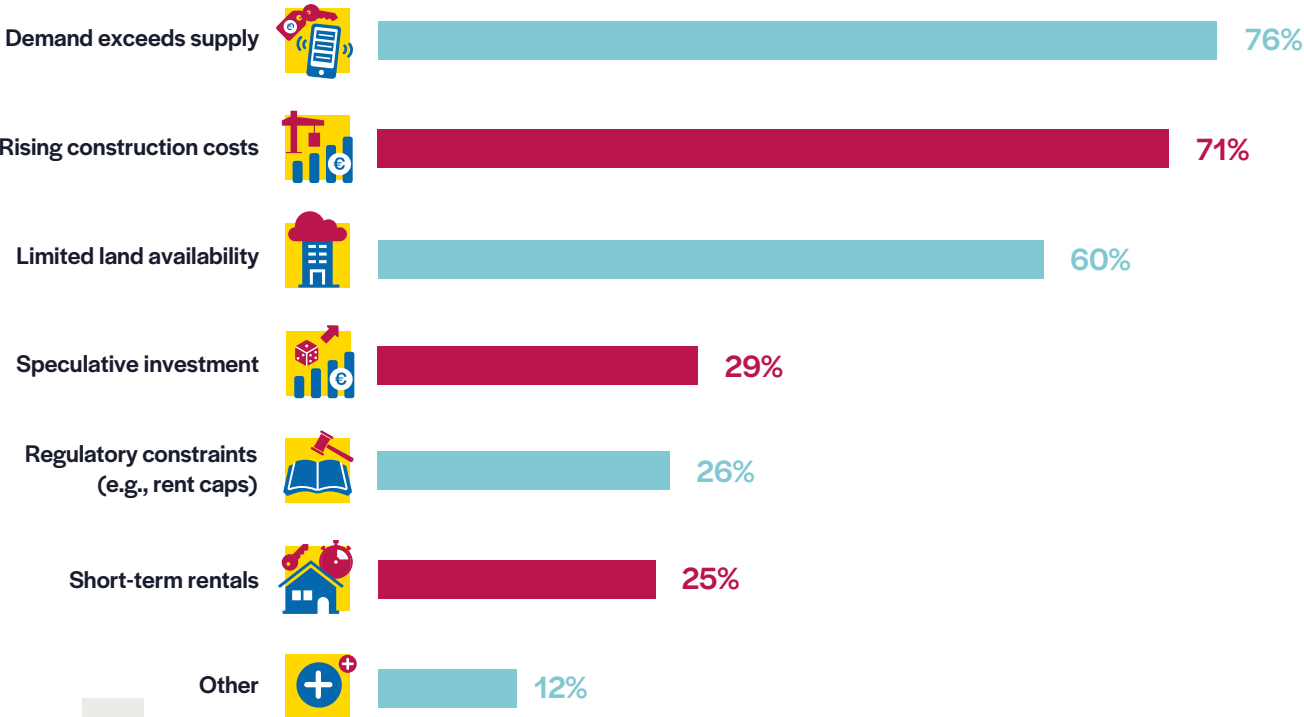
In **Nordic and Central European cities**, housing affordability trends are more mixed, but growing pressure is evident. Vienna stands out as Europe's most affordable city, largely due to its long-standing commitment to public and social housing. Many Nordic cities, including Tampere, Malmö, and Vantaa, fall within the 'moderate' category, scoring between four and six, reflecting an increasing gap between wages and housing costs. Meanwhile, some mid-sized Polish and German cities, such as Chemnitz, Katowice, and Dortmund, report relatively better affordability than larger urban centres, though they remain cautious about future market trends.


The survey paints a worrying picture of housing affordability across Europe. Rising interest rates, rental shortages, and gentrification pressures are worsening the crisis. Without urgent interventions, the affordability gap could force residents out of city centres, deepen social inequalities, and weaken the social fabric of Europe's urban communities. This could have dangerous effects on the social diversity of cities and potentially lead to increased social segregation in cities.

Drivers of housing unaffordability according to mayors

Housing affordability is reaching a breaking point in many European cities, with mayors identifying key factors driving up prices and making it harder for residents to find affordable homes. The data reveals that while demand exceeding supply is the most widespread challenge, other pressures - including rising construction costs, limited land availability, speculative investment, and the expansion of short-term rentals - are compounding the crisis.

Key drivers of housing unaffordability





For seven in ten mayors, the biggest housing challenge is that too many people are chasing too few homes. More than 70% of cities (76%) rank demand exceeding supply as one of their top three concerns, making it the most frequently cited driver of unaffordability. In cities experiencing strong economic growth or rapid population increases, the pace of making housing available - whether by building new homes, repurposing vacant buildings, or bringing underutilised housing stock back onto the market - is not fast enough to keep up with demand.

Even when cities expand housing availability, rising costs make homes unaffordable for the people who need them most. Rising construction costs rank as the second most commonly cited driver, with 71% of cities flagging it as a major barrier to affordability. Inflation, labour shortages, supply chain disruptions, and rising land values are making it more expensive to develop housing at accessible price points. As costs escalate,

developers increasingly prioritise high-end housing, leaving a widening gap for middle- and lower-income residents. Cities such as Zagreb and Malmo explicitly highlight the challenge of providing affordable housing when the cost of materials, wages, and land is rising faster than household incomes.

More than one in two mayors warn that land shortages are worsening the housing crisis. Limited land availability is a significant issue for 60% of surveyed cities, particularly those with strict zoning laws, protected historic areas, or geographical constraints. While land constraints present real barriers, some cities are exploring alternative strategies such as densification, mixed-use developments, and converting vacant commercial spaces into residential housing.

Real estate speculation is pricing out locals in key markets, particularly in high-demand areas. While not a universal issue, 29% percent of cities ranked speculative investment as a top-three concern. Cities such as Antwerp report that speculative

investment plays a notable role in shaping their rental markets, as properties are increasingly bought as financial assets rather than homes. Zagreb highlights how financial incentives have unintentionally fuelled price increases, making it harder for residents to find affordable housing.

Regulatory constraints, such as rent caps and zoning laws, are considered important but not necessarily the root cause of unaffordability. Only 26% of cities rank regulatory factors among their top three concerns, suggesting that while policies like rent controls and zoning restrictions influence affordability, they are not the primary drivers of the crisis. Some cities, such as Gothenburg, argue that planning laws - rather than rent caps - are more significant obstacles to making housing available at affordable prices. Others point to national social policies, such as housing allowances and unemployment benefits, as additional factors shaping affordability.

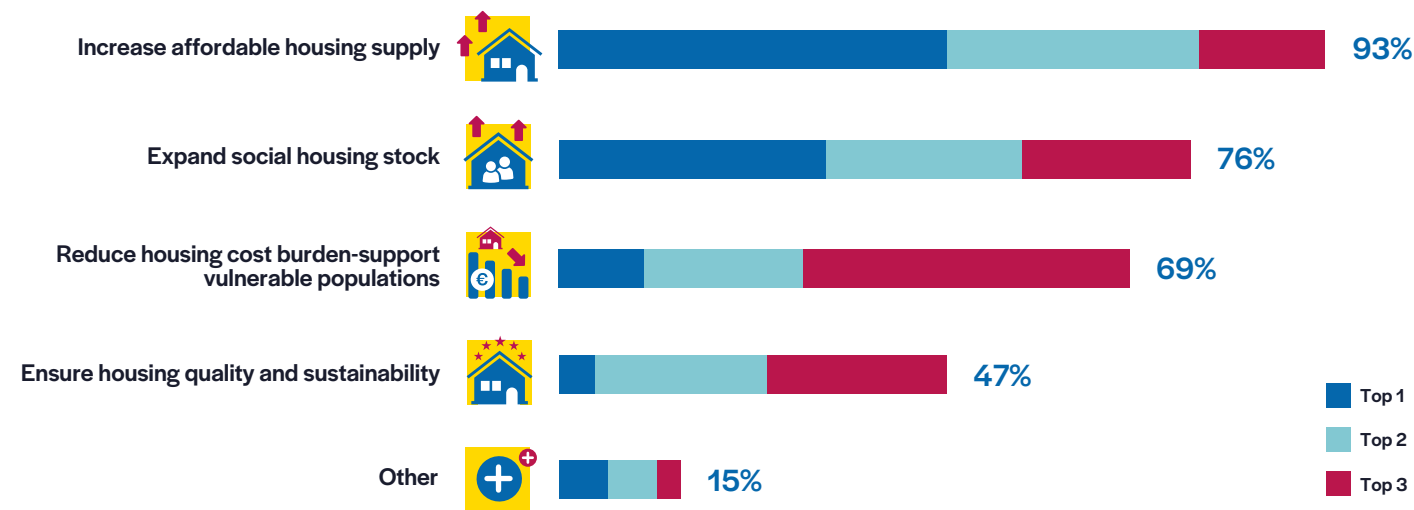
For many tourist hotspots, homes are turning into hotels - pushing locals out of the market. Short-term rentals, particularly through online platforms, have become a serious concern in 25% of cities, particularly those with strong tourism demand. Cities such as Barcelona, Rome, Athens, and Budapest are among those most affected, as long-term rental stock is being converted into short-term lets, reducing availability for residents and driving up rents. Mayors in these cities see unregulated short-term rentals to be a major barrier to affordability and are calling for stricter national regulations.

Beyond these structural drivers, some cities face unique pressures that are accelerating housing unaffordability. In Varna, a 20% population increase driven by the arrival of Ukrainian refugees has intensified housing shortages. In Hatay, thousands of homes were destroyed by an earthquake, drastically reducing supply.

Housing development priorities

European mayors are making affordable and social housing their top priorities as the housing crisis deepens across the continent. Almost one in two cities (47%) identified increasing the supply of affordable housing to be their most important priority, and an overwhelming 93% placed it among their top three. The urgency of tackling affordability is shared by cities across all regions, from major urban centres such as Milan, Lisbon, and Amsterdam to mid-sized cities like Braga, Poznan, and Cluj-Napoca. These cities emphasise that demand continues to outstrip supply, and without large-scale interventions, housing costs will remain out of reach for a growing share of residents. Some cities are going beyond supply-side solutions and cracking down on speculative real estate practices, while others are targeting vacant investment properties to free up more housing for residents.

Ranking of housing priorities in European cities



Alongside affordability, expanding social housing is a major focus, with 32% of cities ranking it as their top priority and a striking 76% placing it in their top three. Many cities, particularly in Central and Eastern Europe, are working to expand their historically limited public housing stock to counterbalance market-driven price increases. Other actions include leading large-scale social housing investment programmes or focusing on repurposing underused properties for social housing instead of relying solely on new developments. In cities like Rome, the emphasis is on reintroducing social housing policies that had been scaled back over the past decade, recognising the critical role public intervention plays in stabilising housing markets.

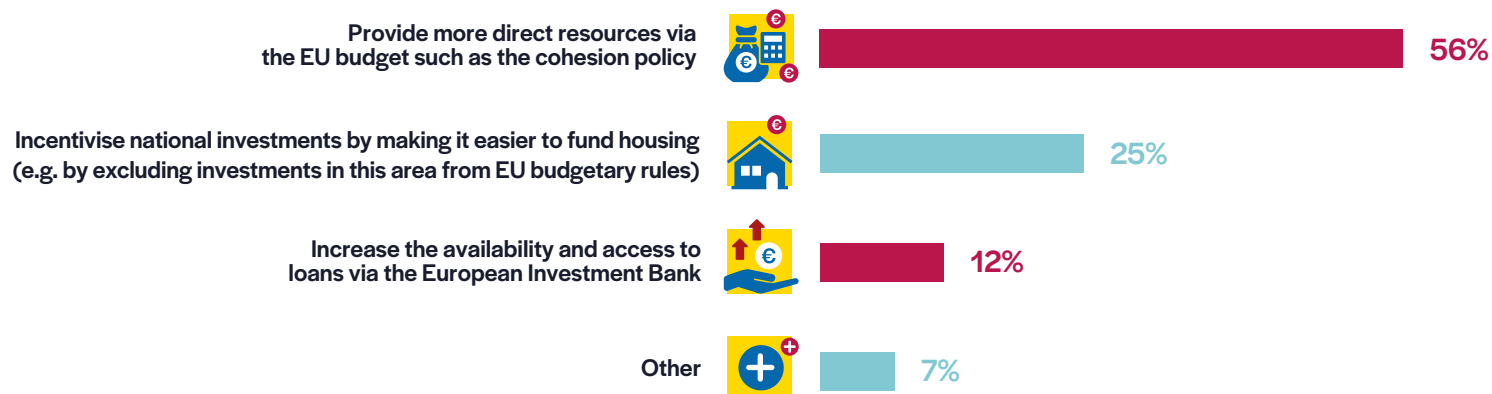
While supply-side solutions dominate, cities are also grappling with how to protect vulnerable populations from the immediate impacts of the affordability crisis. Reducing housing cost burdens for vulnerable groups was the top priority for 10% of cities, while more than 69% placed it among their top three. This is particularly important in cities with high rental pressures, where authorities are implementing targeted financial assistance and rent control measures to prevent displacement.

The quality and sustainability of housing, particularly for elderly and low-income residents, is another key issue. This reflects a growing recognition that affordability cannot be addressed by simply building more homes - existing housing stock must also be improved. Some cities are focusing on large-scale renovations to enhance energy efficiency and reduce long-term costs for residents. Others are investing in accessible housing that meets the needs of ageing populations, ensuring that cities remain inclusive as demographic trends shift.

Beyond these four main policy priorities, some cities are tackling distinct local challenges. Barcelona has announced a ban on short-term rentals by 2028, aiming to rebalance its housing market in favour of long-term residents. Malaga and Madrid are focusing on expanding affordable rental housing for young workers to counteract talent flight due to high housing costs. Antwerp and Ghent are shifting attention towards renovation rather than new construction, arguing that repurposing existing buildings can increase supply more quickly and efficiently.



Ranking of priorities for EU financing for social and affordable housing



EU financing for social and affordable housing

European mayors are calling for stronger EU support to address the housing crisis, with a clear preference for direct EU funding, greater flexibility in national housing investments, and improved access to affordable financing. While financial resources are a crucial part of the solution, mayors also stress that investment must be paired with ambitious local policies and innovative projects to have a lasting impact.

The strongest demand from mayors is for direct EU budget resources, with 56% ranking it as their top priority. The expectation is that EU funding mechanisms,

such as Cohesion Policy and dedicated housing programmes, should be more accessible to cities to support large-scale investment in affordable and social housing. Currently, most cities struggle to leverage EU funding for new housing projects, and the few other EU resources available are not directly reaching out to local governments.

Mayors are also pushing for greater flexibility in national housing investments, with 25% prioritising EU incentives to ease budgetary constraints on housing-related spending. Many cities express frustration with restrictive fiscal rules that

limit public investment in housing, arguing that such constraints undermine efforts to expand affordable housing stock. Many advocate for reforms that would allow national governments to prioritise housing development without being penalised for increasing public expenditure. Some cities go further, arguing that housing should be treated as a social investment rather than a financial burden under EU fiscal rules.

Access to European Investment Bank (EIB) loans is viewed by many mayors as a valuable tool - if adapted to better meet cities' needs. Antwerp, for example, has emphasised that

EIB loans should offer lower interest rates than what the market offers and be more accessible for non-speculative housing projects, such as cooperative housing and urban renewal schemes. Other cities stress that while loans can be useful, they are not a substitute for direct grants, particularly given the restrictions for many cities to use debt-financing for such investments, often due to national rules aimed at respecting EU fiscal rules.

Beyond financial tools, some mayors are calling for the EU to play a stronger role in regulating housing markets. Malmö, for example, argued that the EU could do more to curb housing speculation and ensure that housing is treated as a social right rather than a financial commodity.

The message from mayors is clear: while local governments are at the forefront of delivering solutions, they cannot tackle the housing crisis alone. More direct funding, greater flexibility in national investments, transparency in the housing market, and improved financing mechanisms are needed to empower cities to implement ambitious housing policies. Without stronger EU engagement, the gap between housing demand and supply will continue to grow, putting further pressure on affordability and social cohesion in European cities.

Mayors' experience and expectations in accessing EU funding

When asked about their experience and expectation in accessing EU funding for housing, most mayors stress that the existing system is difficult to navigate and does not meet the scale of the housing crisis.

Many mayors highlight the unpredictability and lack of clarity of EU funding streams, making it difficult to plan long-term investments. Munich warns that funding volumes are too low and quickly exhausted, while the framework conditions for accessing funds change too frequently.

This lack of stability, according to Budapest, prevents cities from making the kind of multi-year investments needed to meaningfully expand housing supply. The city proposes a permanent EU governance mechanism to facilitate direct engagement between local governments and the EU institutions on housing finance, similar to the 100 Climate-Neutral & Smart Cities Mission.

Administrative complexity and bureaucratic burdens are among the most frequently cited obstacles. Nice stresses that the process for securing EU funds is too cumbersome and fragmented, preventing municipalities and social housing providers from accessing support efficiently. Several cities argue that without streamlined procedures, even well-funded EU initiatives will struggle to deliver results on the ground.

There is broad consensus among mayors that the role of Cohesion Policy in housing finance should be strengthened, with cities calling for long-term affordability to be explicitly recognised as a pillar of economic, social, and territorial cohesion.

Several mayors have concrete proposals for structural reforms to the EU's financial approach to housing. Rennes, for example, proposed a dedicated financing mechanism that would fix interest rates for housing sector loans at 2%, ensuring stability regardless of economic fluctuations. Barcelona and Rome, part of the new Mayors Alliance for Housing, call for EU-backed housing programmes specifically aimed at middle- and low-income families who fall between the cracks of social housing eligibility and private rental affordability. Toulouse urges the EU to provide a clear mapping of funding opportunities, ensuring that cities can easily match their legal competences with available EU resources.

In the face of rising construction costs, growing demand, and an increasingly competitive rental market, mayors are making a clear case for stronger EU action. In line with the recent creation of the European Commission's first ever Housing Task Force to support the delivery of the European Affordable Housing Plan, it is clear that the voices of mayors will need to play a key role in finding solutions that work for all Europeans.



Delivering affordable housing in Europe's cities: working towards the European Affordable Housing Plan

By Matthew Baldwin, Head of the Housing Task Force of the European Commission

Housing is not just a basic need – it is a fundamental right. In her statement at the European Parliament to present her Political Guidelines 2024-29, **President von der Leyen** stressed that *“Europe faces a housing crisis, with people of all ages and families of all sizes affected. Prices and rents are soaring. People are struggling to find affordable homes. [...] Typically, housing is not seen as a European issue. Some might say we should not get involved. But I want this Commission to support people where it matters the most. **If it matters to Europeans, it matters to Europe.**”*

So, for the first time, the European Commission has appointed a Commissioner in charge of housing, **Dan Jørgensen**, to address Europe’s housing crisis, and we have set up a task force to coordinate work across the Commission. The European Parliament has also established a Special Committee on the Housing Crisis.

As this survey confirms, cities face a serious affordable housing challenge. Young people and families are encountering real problems in securing affordable housing in our major cities. We are seeing an increase in homelessness, affecting more than one million people, including 400,000 children, so the most vulnerable in society are as ever in the front line. But the crisis is also impacting middle-income households, people in steady jobs, and key workers like teachers, nurses and police officers who cannot afford to live in the cities they serve. There are concerns that short-term rentals in cities like Barcelona, Rome, and Paris may be driving up prices and reducing the chances of local people to find affordable homes.

This crisis is causing not just social exclusion but also, by restricting labour mobility, risks damaging our competitiveness and even our demography as young people are delaying starting a family. However, **cities are set to play a major role in finding a response.** The Commission takes careful note of the proposals of the group of European Mayors for Housing presented in February 2025 and looks forward to the final opinion on the role of cities and regions that is being drafted by the mayor of Barcelona for the European Committee of Regions. The affordable housing crisis also, of course, affects smaller cities and the Commission also recognises the housing problems in rural areas faced with depopulation, poor infrastructure and a lack of job opportunities.

To prepare to respond to these challenges, the European Commission has launched a major consultation exercise ahead of the adoption of the **European Affordable Housing Plan** in 2026. We want to hear from all stakeholders right across Europe. We are launching a Call for Evidence, and the full public consultation will involve a series of themed consultation events.

The Plan itself will focus on funding and financing, aiming to mobilise public and private investment through a pan-European investment platform as well as putting more cohesion funds into housing, and reviewing state aid rules. We will address the inefficient use of the current housing stock and examine the potential role of housing speculation and financialisation. We will also deliver a European Strategy on Housing Construction and take a careful look at potential obstacles to new building, renovation, and repurposing, such as zoning and permitting rules. Additionally, we will support you in implementing the new Regulation on short-term accommodation rental services, which will equip you with the necessary data to adopt proportionate and justified measures when necessary.

Perhaps most of all, by bringing member states, regions and cities together, we see massive scope for mutual learning and sharing of best practices on how to deliver affordable, sustainable, and decent housing in Europe.

Speaking at the launch of our public consultation on 24 March, Commissioner **Dan Jørgensen** stressed the need to see affordable housing in a broader social context, calling for investment in *“**decent, accessible and durable houses**, well connected to local infrastructure – for health and education, services and resources – which provide the **building blocks of communities, and the foundations of society.**”*

Cities understand very well the importance of affordable housing in this sense and will play a key role in overcoming the crisis. Your voice will be particularly important in this process. I would like to take this opportunity to encourage you to take a very active role in the consultation process this year and bring us your ideas!



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