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COMMISSION STAFF WORKING DOCUMENT

Monitoring Road Safety Progress in the EU - Estonia

Accompanying the document

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN
PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL
COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**Report on the Implementation of the EU Road Safety Policy Framework at the Mid-
Point**

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Estonia

1. Summary

In 2024, Estonia was above the EU average (45) with 50 road fatalities per million inhabitants. Compared to 2019, an increase of 33% was recorded although Estonia is a small country where the number of fatalities is subject to annual fluctuations.

Compared to the EU average, the distribution of fatalities in Estonia showed a relatively high proportion of fatalities on roads outside urban areas. In fact, in 2024, 72% of road fatalities occurred outside urban areas, on non-motorway roads. It is noted that there are no motorways in Estonia.

In the Road Safety Strategy 2016-2025 of Estonia, the **targets of fewer than 40 fatalities and 330 serious injuries in 2025** have been set. The target values concern the average number of the casualties for the period 2023-2025. Additional road safety targets have been set for specific road user groups: pedestrians, cyclists, drivers of motor vehicles and passengers. Intermediate targets for 2020 have also been set.

The Road Safety Strategy includes **19 road safety measures** divided in three pillars, related to road user, traffic environment and vehicle safety.

Based on the latest available preliminary data, Estonia has **not made progress towards achieving the 2025 target** of halving road fatalities. For Estonia, data on serious injuries are not available in the CARE database, thus, no assessment of the progress is carried out.

Regarding the progress of the implementation of the road safety actions foreseen in the national strategy for the period 2016-2024, there is a **smooth implementation flow**, with some delays reported mainly due to limited funding. Estonia starts from a medium level in most examined road safety areas (13 out of 28). Based on the self-reported assessment, the baseline is assessed as low in 11 road safety areas and as high in 4 areas. All measures are on track and only in three areas the implementation of the related measures has either not started or has been delayed.

The main gap identified is related to **lack of sufficient funding**. This gap affects the road safety areas of drivers' health, infrastructure interventions in urban areas and on rural roads, as well as the area of designing, building and reconstructing a sustainable and safe infrastructure and traffic supervision.

Examples of **best practices** are available for Estonia, including resources on traffic safety education, communication campaigns and the testing of a new innovative measure as an alternative to speeding fines.

The implementation progress of the foreseen actions in the current strategy (2016-2025) appears broadly well on track, however, the increasing trend in the number of fatalities over the last two years (albeit in a small country where annual fluctuations occur) **has meant that Estonia needs to do more to reach the 2025 target**. The possible way forward to address this could be by:

- exploring new financial resources for the implementation of delayed road safety

measures, with a focus on road infrastructure interventions both inside and outside urban areas,

- reviewing the degree of implementation of the actions
- exploring any other relevant activities

2. Road Safety Strategy and Measures

2.1. Road Safety Strategy

The **Road Safety Programme of Estonia for the period 2016-2025** is part of the “Transport” performance area of the state budget strategy and was compiled on the basis of the 3rd sub-objective “Decreasing traffic damages” of the “National Transport Development Plan 2014–2020” and section 5 of the “National Road Traffic Safety Programme”. The Programme is a continuation of the first “Estonian National Traffic Safety Programme for 2003–2015” (ENTSP). It takes into account how the objectives set for the previous period were achieved and experiences gained, and the experiences of other, more successful countries.

Table 9.1: National road safety programme

Estonia	
Timeframe	2016-2025
Lead Authority	Multidiscipline working groups led by the Transport Administration
Link	https://transpordiamet.ee/media/618/download

2.2. Road Safety Governance

The Ministry of Economic Affairs and Communications and the Governments are responsible for setting targets and Estonian Transport Administration (ETA) are responsible for the **formulation of the national road safety programme**.

ETA is responsible for the **monitoring of road safety developments** in the country.

2.3. Main Safety Issues

Based on the progress achieved over the previous years, the following main safety issues have arisen for Estonia:

- No progress has been made in the number of **car crashes involving pedestrians** since 2010.
- Also, no significant changes have occurred as of 2010 concerning the crashes involving **motorcycles and mopeds**.
- The percentage of **young people** is the highest among drivers involved in traffic crashes.
- The highest number of pedestrian and cyclist fatalities are among **elderly people**. The percentage of children is high among injured road users.

- The vast majority of fatalities (73%) occurred on **national roads**, which make up only 28% of the Estonian road network.

2.4. Road Safety Targets

The following targets have been set in the National Road Safety Programme 2016-2025 of Estonia:

Table 9.2: Road safety targets

Nr of	Baseline (avg 2012-2014)	Mid-level 2020 (avg 2018-2020)	Target 2025 (avg 2023-2025)
1. Fatalities	82	50	40
2. Serious injuries	475	370	330
3. Fatalities and serious injuries	557	420	370
4. Killed pedestrians	26	15	11
5. Seriously injured pedestrians	133	110	98
6. Killed cyclists	6	3	3
7. Seriously injured cyclists	42	35	30
8. Killed drivers of motor vehicles	34	22	18
9. Seriously injured drivers of motor vehicles	177	132	118
10. Killed passengers	14	10	7
11. Seriously injured passengers	123	93	84

2.5. Road Safety Measures

A total of **19 road safety measures** divided in **three pillars** are included in the road safety strategy of Estonia¹.

Table 9.3: Road safety pillars and number of measures

Pillar	Measures
12. Responsible road user who is aware of dangers	9
13. Safe traffic environment	7
14. Safe vehicle	3
Total	19

3. Road Safety Progress

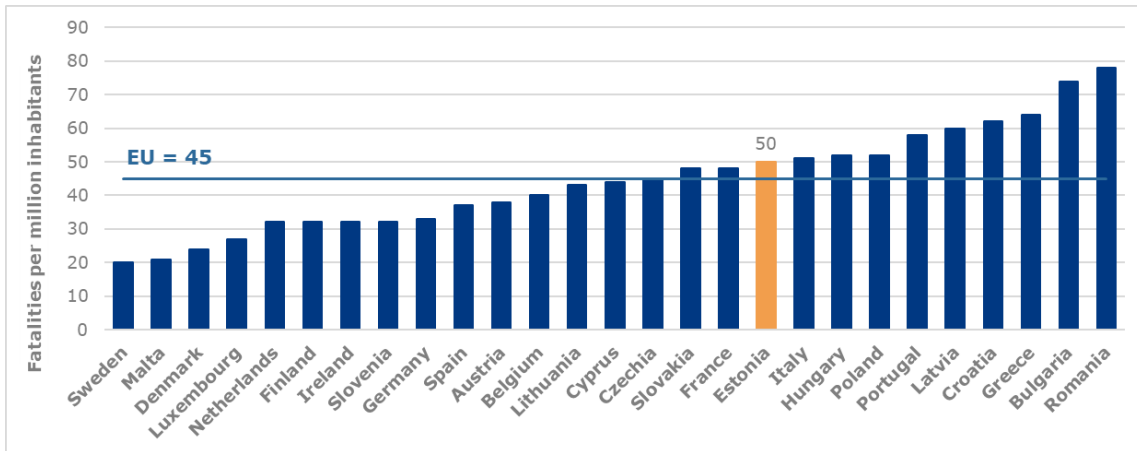
3.1. Road Safety Outcomes

Based on data for 2024, Estonia was **18th out of the 27 EU countries** in terms of the lowest

¹ Estonian Road Safety Programme: <https://transpordiamet.ee/media/618/download>

numbers of fatalities per million inhabitants. In fact, 50 road fatalities per million inhabitants were recorded that year, which is above the EU average (45).

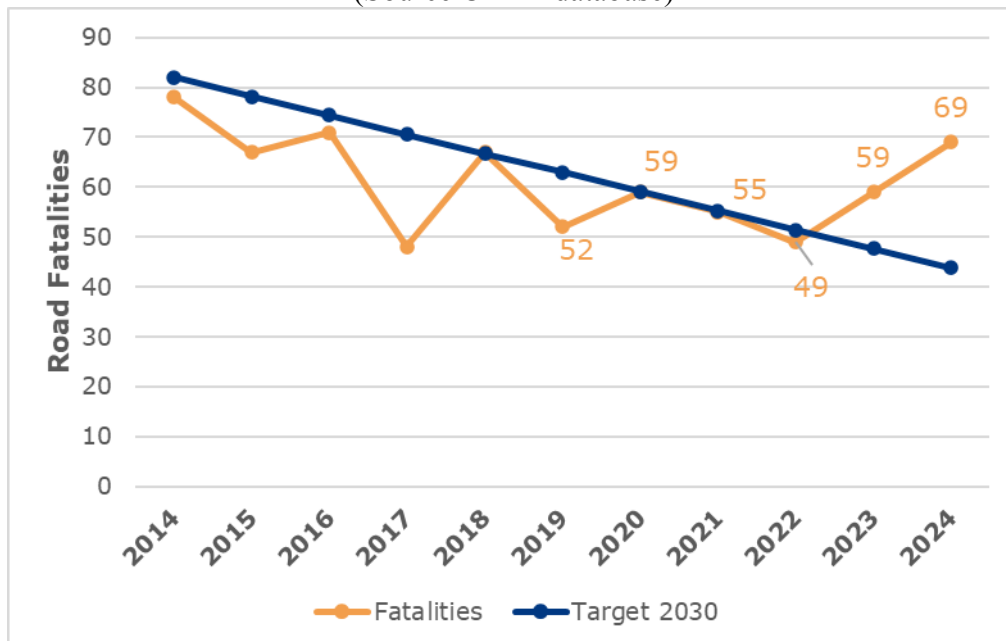
Figure 9.1 Mortality rates by country, 2024



Sources: CARE database on road crashes; population data from Eurostat (online data code [demo_pjan](#)).

Compared to the average values of 2012-2014, which is the baseline for the target set in the road safety programme, road fatalities have decreased. However, the downward trend in road fatalities has been reversed by 2023. Between 2019 and 2024, a 33% increase in road fatalities was recorded. It is noted that concerning the mid-level target of 2020, the average number of fatalities of the period 2018-2020 was 59, which was 9 fatalities higher than the target.

Figure 9.2 Road fatalities and target 2030
(Source CARE database)



Compared to the EU average, the distribution of fatalities in Estonia showed a relatively high proportion on roads outside urban areas². In fact, in 2024, 72% of fatalities occurred outside urban areas, on non-motorway roads. There are no motorways in Estonia.

An overview of the evolution of road fatalities for the years 2019 and 2024 (year with the latest available detailed crash data) is provided below for specific types of roads, crashes and road users. Overall, in Estonia, **road fatalities increased**.

Table 9.4: Evolution of road fatalities, 2019-2023

Fatalities	2019	2024	% in 2024	% change 2019-2024
Total road fatalities	52	69	-	+33%
Inside urban areas	17	19	28%	+12%
Outside urban areas	35	50	72%	+43%
Motorways	-	-	-	-
Single vehicle crashes	16	16	23%	0%
Multi vehicle crashes	26	42	61%	+62%
Car occupants	20	28	41%	+40%
PTW riders	4	8	12%	-
Cyclists	2	2	3%	-
Pedestrians	11	11	16%	0%

3.2. Road Safety Performance Indicators

The use rates of seat-belts among car occupants are higher in Estonia compared to the EU average. Additionally, the average age of the passenger car fleet is higher than the EU average.

² European Commission (2023), Country Profile Estonia. Road Safety Observatory. Brussels, European Commission, Directorate General for Transport.

Table 9.5: Road Safety Performance Indicators, 2022 or latest available year (Source: ERSO, Country Profiles)

	Estonia	EU
Speeding³		
% of passenger cars travelling within speed limits ^a		
Motorways	/	-
Rural Roads	/	-
Urban Roads (50km/h)	/	
Seat belt & CRS use rates (%) ^{a,b}		
Front	99.0	93.1
Rear	87.0	75.3
Child restraint systems (roadside observations)	/	67.0
Child restraint systems (in-vehicle inspections)	/	-
Helmet use rates (%) ^a		
PTW driver	/	97.0
PTW passenger	/	94.4
Cyclist	/	37.8
DUI of Alcohol^c (self-reported)		
% car drivers have driven at least once in the last 30 days over the legal limit	/	11.8
Driver Distraction ^a		
% of drivers not using hand-held mobile device/phone while driving	/	94.8
Vehicle Safety		
% of new passenger cars rated with 4 EuroNCAP stars and above ^a	/	83.6
Average age of passenger car fleet (years) ^d	13.0	12.5

Sources: ^a Baseline project, ^b ETSC (2022), ^c ESRA3 project (2024), ^d ACEA (2025)

4. Monitoring Road Safety Strategy Implementation

4.1. Implementation Progress

Road Safety Management

Estonia starts from a medium level in two road safety areas related to **Road Safety Management**: the national road safety authority and the road safety legislation. The baseline for the area of the national road safety budget is assessed as low. All foreseen measures are on track, except those related to the road safety budget. In Estonia, there is no special budget dedicated to road safety measures. Additionally, there is no national road safety observatory.

³ An EU average is not available for speeding, due to different legal speed limits among countries, which does not allow for a straightforward comparison.

Table 9.6: Self-reported assessment of implementation progress of measures related to road safety management

B1	Road Safety Management	Baseline Assessment (2016)	Progress (2016-2024)
1	National road safety authority	medium	on track
2	National road safety budget	low	not started
3	Road safety legislation	medium	on track
4	National road safety observatory	-	not applicable

Safe Road User Behaviour

In relation to the pillar of **Safe Road User Behaviour**, Estonia starts from a medium level in 6 road safety areas. The baseline is assessed as high in the road safety areas of communication campaigns, vulnerable road users and drivers' health, while it is assessed as low for the areas of traffic supervision and rehabilitation.

In 2024, the majority of the measures of this pillar were **on track**. The implementation of the measures related to elderly users has been completed. It is noted that no measures related to professional drivers have been planned for the examined period in Estonia.

Table 9.7: Self-reported assessment of implementation progress of measures related to road user behaviour

B2	Safe Road User Behaviour	Baseline Assessment (2016)	Progress (2016-2024)
1	Enforcement	medium	on track
2	Education	medium	on track
3	New drivers training	medium	on track
4	Communication campaigns	high	on track
5	Measures for vulnerable road users	high	on track
6	Measures for professional drivers	not applicable	not applicable
7	Other: Elderly road users	medium	completed
8	Other: Driver's Health	high	delayed
9	Other: Prevention	medium	on track
10	Other: Traffic Supervision	low	on track
11	Other: Rehabilitation	low	on track

The number of **traffic related violations** and the time spent for road traffic enforcement is being monitored. Also, checks on drink-driving are carried out, and mobile speed cameras are introduced.

Concerning **education**, the availability of modernized educational materials is ensured and the learning environment is developed. Trainings for teachers of kindergartens and schools that support traffic-related educational activities are conducted.

Regarding the **training of novice drivers**, an analysis of motor vehicle driver education has been carried out and curricula have been updated.

Additionally, 4-5 **media campaigns** per year are carried out on main road safety topics, such as alcohol, speed, distraction, and micro-mobility.

Among the measures for **VRUs** are advocating the use of reflectors and helmets and the importance of the technical condition of the bicycle, as well as developing cycling training materials, constructing additional cycle paths and bicycle lanes, and establishing 30km/h zones in urban areas.

Other active measures related to this pillar are: advanced training for elderly drivers, improving the assessment of a motor vehicle driver's health condition, creating legal bases for conducting additional health checks, developing the alcohol addiction treatment system, organizing campaigns to adhere to the speed limit, tackling drink driving and other problematic traffic behaviours. Also, drivers caught driving under the influence are referred to a programme conducted by psychologists.

Safe Speeds

Regarding the **Safe Speeds** pillar, Estonia starts from a high level in the area of update of speed limits and from a medium level in the area of enforcement. All measures related to this pillar are on track.

In particular, a methodology for determining driving speed has been prepared, and larger cities are reducing the speed limit in the city centre to 30 and 40 km/h. Regarding enforcement, on-spot mobile speed cameras and police forces are placed.

Table 9.8: Self-reported assessment of implementation progress of measures related to safe speeds

B3	Safe Speeds	Baseline Assessment (2016)	Progress (2016-2024)
1	Update of speed limits	high	on track
2	Enforcing speed limits	medium	on track
3	Campaigns on speeding	-	on track
4	Monitoring speeding	-	not applicable

Safe Roads

Regarding the **Safe Roads** pillar, the self-reported assessment shows a medium baseline in the majority of the related road safety areas. Estonia starts from a low level in the areas of road design standards, road safety audits and inspections, traffic management and at-grade railway crossings. All measures of this pillar are on track.

Table 9.9: Self-reported assessment of implementation progress of measures related to safe roads

B4	Safe Roads	Baseline Assessment (2016)	Progress (2016-2024)
1	City Mobility & Safety Plans	medium	on track
2	Urban infrastructure for VRUs	medium	on track
3	Rural roads safety interventions	medium	on track
4	Motorways safety management	-	not applicable
5	Road design standards	low	on track
6	Road safety audit and inspection	low	on track
7	Other: Designing, building and reconstructing a sustainable and safe infrastructure	medium	on track
8	Other: Road maintenance	medium	on track
9	Other: Traffic management	low	on track
10	Other: At-grade railway crossing	low	on track

Among the measures for **urban infrastructure** are the construction of light traffic roads at dangerous sites, improvement of safety at road crossings, while among the interventions on **rural roads** are installation of lighting and implementation of a pedestrian-friendly speed regime. Also, the road design standards are updated.

Among the remaining measures of this pillar are design, construction and reconstruction of sustainable and safe infrastructure, identifying and treatment of dangerous sites, sustainable and safe traffic management, introduction of ITS capabilities, and the implementation of additional safety measures at railway crossings.

Safe Vehicles

In relation to the pillar of **Safe Vehicles**, Estonia starts from a low level in all related areas. All measures are on track, while the implementation of measures related to fleet renewal has been delayed.

Regarding the automation preparation, the eCall system and real-time notification systems for road users will be introduced.

Also, commercial transport and the movement of work-related vehicles are given more attention than before. Activities continue in the area of compliance with the requirements related to the most severe violations and control of compliance with the requirements for trucking.

Table 9.10: Self-reported assessment of implementation progress of measures related to safe vehicles

B5	Safe Vehicles	Baseline Assessment (2016)	Progress (2016-2024)
1	Fleet renewal	low	delayed
2	Promotion of ADAS	-	not applicable
3	Technical vehicle inspection	low	on track
4	Automation preparation	low	on track
5	Other: Safety of a work-related vehicle	low	on track

Post Crash Care

No measures related to the **Post-Crash Care** pillar are available in the road safety programme of Estonia.

Table 9.11: Self-reported assessment of implementation progress of measures related to post crash care

B6	Post Crash Care	Baseline Assessment (2016)	Progress (2016-2024)
1	Reduce EMS reaction time	-	not applicable
2	Support people injured	-	not applicable

4.2. Best Practices

Examples of best practices are available for Estonia:

Safe Road Use Behaviour

- **Education:** The Estonian website liikluskasvatus.ee offers a comprehensive resource on traffic safety education tailored for various age groups, including children, parents, and educators. It provides interactive materials like games, tests, and informative videos on safe pedestrian and cycling practices, responsible vehicle use, and general road safety.
- **Communication campaigns:** The Transport Administration of the Republic of Estonia publishes prevention campaigns on its website. These campaigns address issues such as speeding, driving under the influence, pedestrian safety, and responsible behaviour on the roads.

Safe Speeds

- The **Time-out-station** was tested on Estonian motorways in 2019. When a speeding was registered by the police, the driver was stopped. If they had no pre-existing traffic-related offences, they were offered a choice: either to pay a fine or wait by the roadside and continue their trip after a certain time had passed.

4.3. Gaps

Based on the self-reported assessment of the implementation progress of the road safety programme, the main gap identified is related to **lack of sufficient funding**. This gap affects

the road safety areas of drivers' health, infrastructure interventions in urban areas and on rural roads, as well as the area of designing, building and reconstructing a sustainable and safe infrastructure.

Lack of funding is reported as a gap for the area of **traffic supervision** as well, since there is no budget for new traffic monitoring equipment. Also, in Estonia, there is no general consensus on the use of average speed cameras and the implementation of a demerit-point system is not yet under discussion due to lack of support.

Also, there are negative **reactions in society to the reduction of speed limits** on undivided 1+1 rural roads (80km/h) and inside cities (40 or 30km/h). Safe speeds need to be better advocated together with mobility and environmental benefits.

Finally, there is not a systematic process concerning the conduct of **road safety inspections**, which also are not documented well.

5. Conclusions and Recommendations

In the road safety programme 2016-2025 of Estonia, the **targets of fewer than 40 fatalities and 330 serious injuries in 2025** have been set. The target values concern the average number of the casualties for the period 2023-2025. Also, additional road safety targets are set for specific road user groups: pedestrians, cyclists, drivers of motor vehicles and passengers. In total, 19 road safety measures divided in three pillars are included in the programme.

In 2024, Estonia, with 50 fatalities per million inhabitants, **ranked 18th out of the 27 EU countries** in terms of road mortality. Compared to the EU average, the distribution of fatalities in Estonia showed a relatively high proportion of fatalities occurred on roads outside urban areas.

Based on data, between 2019 and 2024, an increase of 33% in road fatalities was recorded. This indicates that Estonia is unlikely to reach the 2025 target of halving the number of road fatalities although it is a small country where the number of fatalities is subject to annual fluctuations.

Regarding the implementation of the road safety actions foreseen in the national road safety programme, there appears to be a **smooth implementation flow**, with some delays reported mainly due to limited funding. Based on the self-reported assessment, all measures are on track and only in three areas the implementation of the related measures has either not started or has been delayed.

Finally, the implementation progress of the foreseen actions in the current programme (2016-2025) appears to be broadly well on track. However, the increasing trend in the number of fatalities over the last two years means **that Estonia needs to do more to reach its 2025 target** (and subsequently the 50% target for 2030). Possible ways to address this could be:

- exploring new financial resources for the implementation of delayed road safety measures, with a focus on road infrastructure interventions both inside and outside urban areas,
- reviewing the degree of implementation of the actions,
- exploring any other relevant activities.