

**Sufficiently International
Perspective in Swedish
Infrastructure Planning?**

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Transport Analysis

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Publisher: Brita Saxton

Publication date: 2014-12-19

Summary

Describing the extent and rate of investment in infrastructure provides one view of the transport system. However, it does not give us the whole picture, as it fails to address issues having to do with the quality of existing infrastructure, for example, maximum permitted speed limits, bearing capacity restrictions, and costs associated with shipments made using given modes of transport. Nor does such an approach take into account the need of the economy or population for access to markets and input goods. The results of national and international survey studies of transport system quality and scope point to diminished satisfaction in recent years with regard to all four traffic types, even though extensive resources have been devoted to developing the Swedish transport system. Analyses of the accessibility that the transport system offers also indicate that accessibility varies across the country. For instance, Stockholm and Sweden's other two major metropolitan areas enjoy a level of accessibility that compares favourably with that of the other NUTS2 areas in Europe. On the other hand, accessibility is considerably poorer in parts of the country, particularly in Northern Sweden, with their long distances to European markets, and is on a par with that of several regions in the Eastern European republics.

Poor access to key markets and an infrastructure that users perceive as of lower quality than that of comparable countries around Sweden are important considerations if we are to compete in an increasingly globalised world characterised by increased trade. World trade continues to expand apace with growing markets, primarily in parts of Asia and Eastern Europe. To this can be added a degree of concentration on larger ports, i.e., those with the capacity to accommodate ever-larger vessels, in both Asia and Europe. In the long term, this will have a negative impact, in the form of congestion, on the capacities of land and sea infrastructures to send and receive deliveries of goods. This could in turn result in those goods being shipped via transport chains other than those used previously. Potential intercontinental shipping links that could offer competitive alternatives to maritime shipping already exist. However, maritime shipping is expected to remain the clearly dominant traffic type for long-distance international goods shipments for the foreseeable future. Airfreight may also offer an alternative for longer-distance shipments, particularly of high-value goods. Although financially important for certain types of goods, airfreight currently has a limited scope in terms of tonnage.

Swedish goods volumes have increased over time, although the trade pattern and roster of major import and export countries have long remained relatively stable, with the Nordic region and Northern Europe constituting the most important markets from a Swedish perspective. It is thus also reasonable, with respect to international-level changes, for Swedish infrastructure planning to continue focusing on what can be expected in these countries and regions in terms of economic growth and, most importantly, infrastructure development. The expansion of the Trans-European Transport Networks (TEN-T) goods corridors, the ERTMS¹ corridors, and the expansion efforts of neighbouring countries are of particular interest.

¹ ERTMS = European Rail Traffic Management System

However, predicted future trade patterns point toward the increased importance of the markets in Asia and Eastern Europe, underpinned by infrastructure expansion in Eastern Europe as well as links to Asia. This could result in significant goods flows to and from, for example, Sweden's ports on the Baltic. Other cooperative planning ventures for international shipments, such as the Trans-European Motorway (TEM), Trans-European Railway (TER), and Euro-Asian Transport Linkages (EATL), should consequently be more important for Sweden in the long term.

Swedish infrastructure planning as concretised in the national plan proposed by the Swedish Transport Administration and adopted by the Swedish government (Swedish Transport Administration 2013a; Swedish Ministry of Enterprise, Energy and Communications 2014b), which has been allocated SEK 522 billion in funding for the 2014–2025 period, has therefore been analysed in light of these potential changes in trade patterns and the evolution of the aforementioned international trans-border cooperative projects. A distinct national focus emerges, although exceptions do exist. Major projects underway at the EU level, such as the Stockholm–Palermo goods corridor and the ERTMS expansion, are noted in the plan. The completion of the Fehmarn Belt link between Denmark and Germany and its ancillary investments in Denmark are also cited. However, Sweden's national plan does not indicate whether or how these projects have influenced the choice of projects, or describe how they might result in remaining deficiencies² to be rectified in the future Swedish infrastructure system.

The focus of this analysis has not been on assessing whether the plan proposed by the Swedish Transport Administration is the right one. However, there is a clear risk that Sweden's international perspective will be lost, to the detriment of its international shipping, if developments at the international level are not taken into account more systematically in the future.

2 The Swedish Transport Administration defines an identified deficiency as a deficiency about which something is known but that merits study in greater depth, for example, via choice-of-measures studies of needs, potential solutions, costs, and societal benefits. Funds have been earmarked in the plan for conducting in-depth studies of identified deficiencies cited in the plan.



Transport Analysis is a Swedish agency for transport policy analysis. We analyse and evaluate proposed and implemented measures within the sphere of transport policy. We are also responsible for official statistics in the transport and communication sectors. Transport Analysis was established in April 2010 with its head office in Stockholm and a branch office in Östersund.