TRANSPORT ANALYSIS

Follow-up of transport policy objectives 2021

Summary
Report 2021:6

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Publisher: Mattias Viklund
Publication date: 2020-11-19

Summary

The overall transport policy objective

The objective of transport policy is to ensure the economically efficient and sustainable provision of transport services for people and business throughout the country.

Overall, Transport Analysis considers that the transport supply is not yet approaching long-term sustainability, based on all the relevant sustainability perspectives. Non-internalised costs persist for both shipping and personal transport, across all transport types. This entails a risk that our society is overconsuming transport compared to what would be most efficient from a socioeconomic standpoint. Neither over- nor under-internalisation contributes to socioeconomic efficiency. The conditions surrounding commercial shipping are not considered to have moved in a positive direction. The *Usability by everyone in the transport system* indicator is considered to be trending negatively.

Digital access without ties to transport has improved. We also see that those areas with formerly inadequate coverage have now largely been covered by the broadband expansion, even though we do not find that the established intermediate objectives in this area have been achieved on time. The negative impact of the transport system on the landscape and animal life is not considered to have diminished.

Traffic safety is constantly improving, although the goal of reduced traffic fatalities does not appear to have been achieved on time. Greenhouse gas emissions continue to decline, but the rate of progress is not sufficient for it to be likely that the intermediate objective for 2030 will be achieved on time.

Overall, Transport Analysis finds that the transport system has not achieved the overall objective, as the various aspects of sustainability cannot compensate for one another. Even though our overall assessment is unchanged from previous years, there is reason to note that, since the adoption of the objectives, the number of key metrics guiding the overall assessments that have evolved positively exceeds the number that have moved in an undesirable direction.

The functional objective

The design, function and use of the transport system will contribute to provide everyone with basic accessibility, of good quality and functionality, and to the development capacity throughout the country. The transport system will be gender equal, meeting the transport needs of both women and men equally.

Overall, the status of the functional objective is considered to have trended somewhat more negatively since the objectives were adopted than in last year's assessment. Most concerning is the evolution of the transport system's standards and reliability in terms of road transport, which is certainly considered to be on a level similar to when the objectives were adopted, but where the tendency in recent years still points to a worsening unless measures are implemented that can reverse the trend. The coronavirus pandemic has also had significant negative effects on the usability of the transport system. This applies not least to the difficulties that individuals with functional disabilities encounter in using public transport. This assessment is made primarily on the basis of the general perceptions of risk and the living situations of individuals with functional disabilities, rather than on changes in the public transport system. Interregional access has also been trending negatively in recent years, i.e. even before the pandemic. Financial affordability has also diminished over time. The fact that the number of people holding C- and D-class driving licences has continued to decrease even as their median age has continued to climb, combined with the consequences of the coronavirus pandemic, particularly in the travel industry, leads to the conclusion that the indicator concerning the conditions affecting the transport industry has moved in a negative direction. The data sets on the basis of which the evolution of the accessibility of goods shipments is assessed have been limited this year, due to the pandemic, but this indicator is considered to remain at roughly the same level as when the transport policy objectives were adopted.

There are, however, some bright spots and signs of positive movement, particularly in terms of rail service, with good on-time performance. The opportunities afforded by digitalisation to gain access without transport are moving in a positive direction. Unfortunately, we are also seeing a health risk in the tendencies towards more sedentary time and less active travel. The transport sector is showing some minor positive signs of greater energy efficiency, although the results are still modest in terms of both energy efficiency for various types of transport and in the form of transitions to more energy-efficient modes of transport.

There are clear indications of geographic differences in accessibility across all metrics and indicators, differences which are also tending to grow over time. Regions with relatively good accessibility are tending to develop positively, while those with less favourable conditions are moving in a negative direction, or more slowly in a positive one.

The impact objective

The design, function and utilisation of the transport system are to be adapted in such a way that no one is killed or seriously injured in traffic. The design of the transport system is also to help to achieve the overarching generational goal for the environment and the environmental quality objectives, and to contribute to improved health.

Energy efficiency within the transport sector has seen positive movement in terms of personal transport and goods shipments by road since 2009. However, the rate of progress is slow in relation to hopes that greater efficiency would contribute to achieving the established intermediate objectives. This applies in particular to that portion of the improved efficiency that is to be achieved via a transport-efficient society. Positive indications in this year's follow-up

include the clear breakthrough achieved by rechargeable vehicles, and indications that the coronavirus pandemic may have established a new norm in terms of how we utilise digital solutions for work and communication. Greenhouse gas emissions from both foreign and domestic shipping and travel decreased markedly over the pandemic year, i.e. 2020. Nevertheless, the preliminary calculated levels for such emissions are still above where we should be in pursuing a linear progression towards the intermediate objective for 2030.

Based on the metrics used in the follow-ups of the objectives, there are no clear tendencies for the impact of transport on the natural environment evolving in any decisive way since the transport policy objectives were adopted. With regard to the living environment for humans, the population is growing fastest in urban areas, which face the greatest problems in terms of noise and air pollution from transport. This means that more people may be exposed to problematic levels, even though there is a long-term trend towards, in particular, a decrease in problems associated with air pollution in urban areas. The supplementary indicator *Physically active travel* indicates that a smaller share of the population is having its need for exercise met via daily walking or cycling trips.

The number of fatalities in the entire transport system in 2020 was 335, with 234 dying in accidents and 101 in confirmed cases of suicide. This was 69 fewer fatalities than in 2019 (-17%). Since the baseline year of 2007 (measured as an average for the years 2006–2008), the number of fatalities throughout the entire transport system has fallen by 31%. The intermediate objective of a maximum of 220 road traffic fatalities was not achieved if we consider the average numbers of fatalities for the years 2018–2020. The target reduction in fatalities is still 11% away. In terms of maritime transport, the fatalities goal has been achieved, while the fatality figures for aviation were extremely low throughout the studied period. The number of serious injuries cannot be measured in a manner that enables comparison across all parts of the transport system. However, given the favourable trend in the number of fatalities, our overall assessment is that the trend is towards achieving the transport policy objectives in the area of transport safety.

Changes compared to last year's follow-up

Our assessment of *Usability for everyone* has changed from a neutral arrow to a negative one. New metrics for measuring accessibility for people with functional disabilities were introduced in last year's report, and a follow-up reveals a significant worsening of public transport accessibility for those with functional disabilities. There are also signs that more people are opting for other modes of transport or different travel routes due to concerns about falling victim to crime.

Our assessment of the *Financial affordability of transport* has changed. Last year's positive assessment reflected the fact that, for the population *on average*, welfare development resulted in income gains that exceeded the average increases in transport costs. Following a development project, the focus of the indicator has now been changed to address daily travel by people in financially weaker households. This new key metric points to a negative trend.

Our assessment of the evolution of *Conditions affecting the transport industry* is also more negative. This has to do in part with a continued trend towards fewer and, on average, older holders of driving licences for buses and heavy lorries, and in part with how the industry has been affected overall by the pandemic in the last year, with the travel industry being particularly hard hit in various ways.

Our assessment for the *Accessibility – goods shipments* indicator has changed from a negative to a horizontal arrow. In this case this is due in part to a revaluation of certain bases used for assessment, and to the fact that access to data was limited because international indices had not been updated in previous years. The conclusion that the status of commercial goods shipments has not worsened since the objectives were adopted is also supported by supplemental information reported under *The transport system's standards and reliability,* where, among other things, continued improvement in rail service reliability was noted.

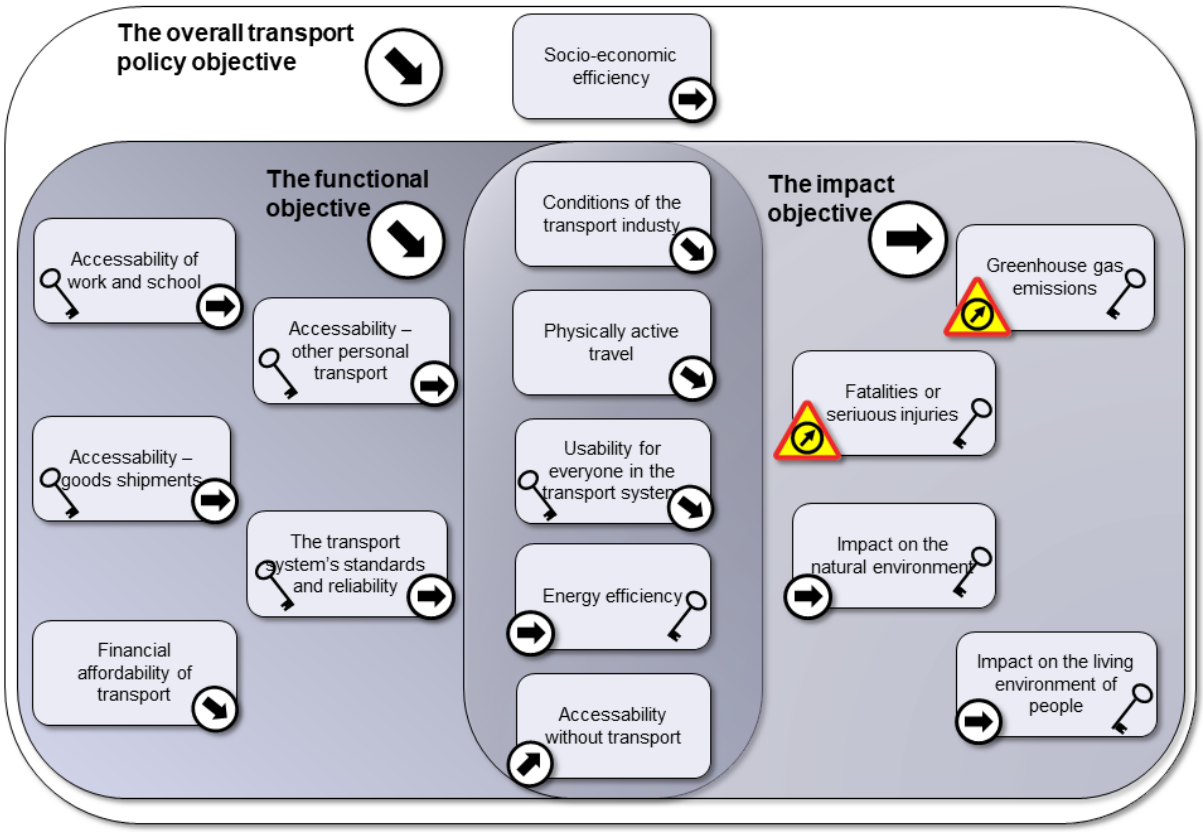

Figure A. Overall assessments of indicators and objectives. An upward-pointing arrow means that the indicator or objective has developed in the desired direction since the transport policy objectives were adopted in 2009. A downward-pointing arrow indicates that the development trend has, at least in some respects, been away from the objective. A horizontal arrow indicates that our overall assessment is that the relevant status within the transport system is approximately the same as when the objectives were adopted.

TRANSPORT ANALYSIS

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 2010 with its head office in Stockholm and a branch office in Östersund.

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