

**Follow-up of transport
policy objectives 2022** **Summary
Report 2022:11**

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Transport Analysis

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Publisher: Mattias Viklund

Publication date: 2022-07-06

Summary

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



Since the objectives were adopted, a greater number of key metrics guiding the overall assessments have developed in a positive direction than have done so in an undesirable direction. Overall, Transport Analysis still finds that the transport system has not progressed towards the overall objective in terms of all the relevant sustainability aspects, as these various aspects cannot compensate for one another (Figure A).

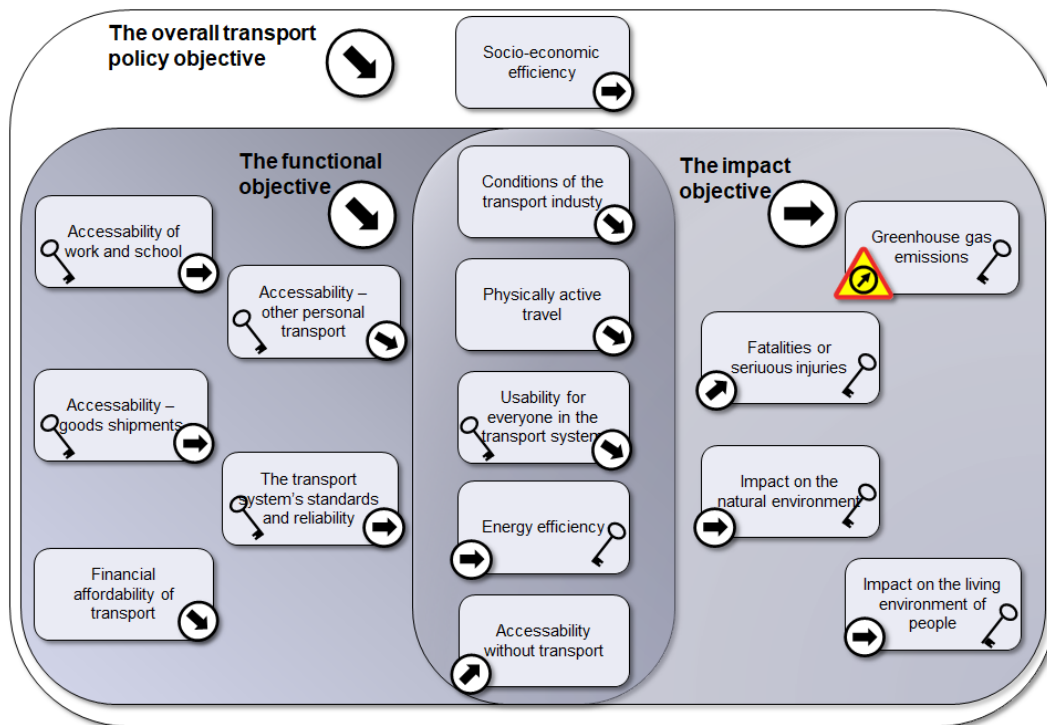


Figure A. Overall assessments of indicators and objectives. An upward arrow means that the indicator or objective has developed in a desirable direction since the adoption of the transport policy objectives in 2009. Downward arrows indicate that developments have, in at least some respect, moved away from the objective. A horizontal arrow means that our overall assessment is that the status of the transport system is roughly the same as when the objectives were adopted. The arrow in the warning sign indicates that an intermediate objective is not considered to have been achieved in time.

There are chronic non-internalised costs for both goods shipments and personal transport, and across all transport types. This entails a risk that society will over-consume transport compared to what would be most socioeconomically efficient. The conditions and assumptions surrounding commercial transport are not considered to have developed in a positive direction. The *Accessibility – other personal transport* and *Universal usability in the transport*

system indicators are considered to have moved in a negative direction, and this can be tied to the consequences of the Covid pandemic in both cases.

Digital access without a need for transport has been improved. We also see that areas which formerly had deficient coverage have now been largely covered by the broadband build-out, even though set intermediate objectives in this area are not considered to have been achieved in time. The transport system's negative impact on the landscape and animal life is not considered to have diminished.

Traffic safety is improving continuously. The new intermediate objectives were formulated with 2030 as their target year, and because road traffic dominates the numbers of injuries and fatalities, it is entirely decisive in terms of what will happen with traffic safety moving forward. Greenhouse gas emissions have remained essentially unchanged over the last year compared to previous years. The pace of development is insufficient for it to be likely that the intermediate objective for 2030 will be achieved in time.

The Functional Objective

The design, function and use of the transport system shall contribute to supplying everyone with basic accessibility of high quality and usability, and to driving development throughout Sweden. The transport system must be gender-equal, meeting the transport needs of men and women equally.



Overall, the status of the functional objective is considered to have trended in a somewhat more negative direction 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 admittedly 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 could reverse the trend. The Covid pandemic has also had significant negative effects on the usability of the transport system. This pertains not least to problems for individuals with functional impairments in terms of using public transport. This assessment is made primarily on the basis of general risk perceptions and the living situation of those with functional impairments, rather than on any changes in the public transport system. Interregional access has also evolved negatively over the last few years, and was doing so even before the pandemic. Financial affordability has also decreased over time.

The fact that the number of holders of C- and D-class driving licences has continued to decline even as their median age has risen has, combined with the consequences of the Covid pandemic, especially in the travel industry, led to our conclusion that the indicator for conditions in the transport industry has developed negatively. Because of the pandemic, the input data for assessing the evolution of access to goods shipments have been limited this year, but we believe that this indicator is at roughly the same level as when the transport policy objectives were adopted.

There are, however, bright spots and signs of a positive trend, particularly in terms of train service with good on-time performance. The opportunities afforded by digitalisation to achieve access without transport continue to develop positively. Unfortunately, we also perceive a health risk in the tendencies towards increased sedentary behaviour and reduced active travel. The transport sector is showing some minor positive signs of greater energy efficiency,

although the results are modest both in terms of the energy efficiency of the various transport types and in the form of transitions to more energy-efficient modes of transport.

There are clear signs of geographical differences in terms of access across all metrics and indicators, differences that are also tending to increase over time. Regions with relatively good access are tending to develop positively, while those with poorer conditions are moving in a negative direction, or more slowly in a positive one.

The Impact Objective

The design, function and use of the transport system shall be adapted so that there are no fatalities or serious injuries and shall contribute to the overall generational goal for the environment and environmental quality goals, and to improved health.



The energy efficiency of the transport sector has developed positively since 2009 in terms of personal transport and goods shipments by road. However, the pace of this evolution is low when weighed against hopes that such improvements in efficiency would contribute to achieving the set intermediate objectives. This applies in particular to that portion of the improvements in efficiency that are to be achieved via a transport-efficient society. Positive signs in this year's follow-up include the continued strong performance of rechargeable vehicles in new vehicle sales, and the indications that the Covid pandemic may have established a new norm in terms of how we utilise digital solutions for work and communication.

Greenhouse gas emissions from both domestic and foreign shipments and trips decreased markedly during the 2020 pandemic year, but this trend came to a halt in 2021. This means that we now find ourselves even further from the path of development that would be needed to achieve the intermediate objective for 2030.

Based on the metrics used in our follow-up of this objective, there are no clear tendencies to indicate that the impact of transport on the natural environment has trended in any decisive way, either positively or negatively, since the adoption of the transport policy objectives. With regard to the human living environment, the population is increasing fastest in urban areas, which face the biggest problems with noise and air pollution from transport. As a result, more people are being exposed to problematic levels, even though there is a long-term trend towards less serious problems, particularly in terms of air pollution in urban areas. The supplemental indicator *Physically active travel* indicates that a declining share of the population is having its needs for exercise met through daily walking or cycling trips.

In 2021, (preliminarily) 339 people perished in all types of transport combined, 236 in accidents and 103 by suicide. This was seven fewer fatalities than in 2020 (-2%). The total number of traffic fatalities has decreased by 42% since 2007.¹

This favourable trend is almost entirely attributable to developments in terms of road traffic, where the majority of fatalities occur. If we consider all fatalities, road traffic accounted for 65% in 2021, with rail traffic accounting for 26%.

¹ 2007 was the base year for the earlier intermediate objectives and, in practice, the average for 2006–2008 was used as a base value in assessing the objectives.

The numbers of serious injuries cannot be measured in a manner that enables comparison across all parts of the transport system, but given the favourable trend in the number of fatalities in, primarily, road traffic, our overall assessment is that the trend is towards our transport policy objectives in the area of traffic safety.

Changes compared to last year's follow-up

Our assessment of *Access – other personal transport* has changed from a horizontal to a negative arrow. This is due mainly to the fact that the metrics capture poorer interregional access, which may be tied to the effects of the Covid pandemic.

The assessment arrow *Fatalities and serious injuries* has not changed direction, but had previously been placed inside the warning triangle. The warning triangle also indicated that, even though the trend had been in the right direction, we found that the set intermediate objectives would not be achieved in time. The assessment is now being made based instead on the intermediate objectives for 2030, and a few more years need to pass before we will be able to determine whether the pace of development aligns with what is needed to achieve the intermediate objectives in time.

Financial affordability of transport is considered to have trended negatively, just as it did the year before. However, following the method adjustment that was made, it is primarily the affordability of public transport for those in households at risk of poverty that is considered to have decreased.



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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