

Follow-up of transport policy objectives 2023

Summary report: 2023:5

Date: 2023-05-02

Trafikanalys

Adress: Rosenlundsgatan 54, SE-118 63 Stockholm

Phone: +46 10 414 42 00

E-mail: trafikanalys@trafa.se

Webadress: www.trafa.se

Publisher: Mattias Viklund

Datum: 2023-05-02

Summary

The Overall Transport Policy Objective

The transport policy objective is to ensure a socioeconomically efficient and long-term sustainable transport solution for the citizenry and business community of all of Sweden.



Generally speaking, Transport Analysis finds that, based on all relevant sustainability perspectives, our society has not advanced towards a long-term sustainable transport solution. This is because there are both key and supplemental indicators that have trended negatively, while the various sustainability aspects cannot be considered to compensate for one another.

After several years during which the Covid pandemic had a major impact on the transport system and our travel habits, the spread of the virus came to an end in early 2022, and it did become possible to lift the travel restrictions shortly thereafter, and both foreign and domestic travel rebounded. New challenges associated with dramatic rises in fuel and energy prices, a parts shortage in the automotive industry and closed-off air spaces affecting air traffic between Asia and Europe arose instead in the wake of the Russian invasion of Ukraine.

The impact objective has been negatively affected by a decline in new car sales, which can be attributed in part to worsened economic prospects due to the war. During 2022 there were also persistent supply chain problems stemming from the pandemic, which led to increases in waiting times for new vehicles. Shortages of critical metals and materials in the coming years pose a risk of further impacting supply chains, which could delay the electrification process. The longer flight paths to Asia have naturally had a negative climate impact as well, even though international flights are not, strictly speaking, included in Sweden's climate reporting. Higher fuel prices and inflation as a consequence of the war are negatively affecting the functional objective, as financial affordability is being degraded. The lengthy flight times to Asia are also reducing affordability.

Neither under- nor over-internalisation of the marginal costs of transport favour socioeconomic efficiency. The skew that seems to exist indicates that far too much transportation is being done with lorries, and that vehicle traffic in urban areas should be decreased compared to current levels. This under-internalisation is notably lower outside urban areas, which means that transport activities there are bearing their costs to a greater degree than in urban traffic. In the case of EVs driven in rural areas, their operation is considered to be even over-internalised by a few öre per person/kilometre.

The evolution of the transport system is contributing to Sweden's progress towards some of the global sustainability goals outlined in Agenda 2030. For example, our greenhouse gas emissions have decreased, and the number of traffic fatalities is diminishing over time. But there are also challenges, i.e. the affordability of transport is decreasing for those with low incomes, and the transport system is not moving in the desired direction in terms of accessibility and standards.

Compared with earlier years, Transport Analysis's assessments regarding most of the 15 indicators on which the follow-up is based remain valid. This pertains to *The transport system's standards and reliability*, which is now deemed to have trended negatively compared

to when the objectives were adopted. It also pertains to *Usability by everyone in the transport system* and *Accessibility – other personal transport*, both of which are considered in this year's follow-up to be at levels equivalent to those present when the objectives were adopted, which is a more positive assessment than last year (Figure A).

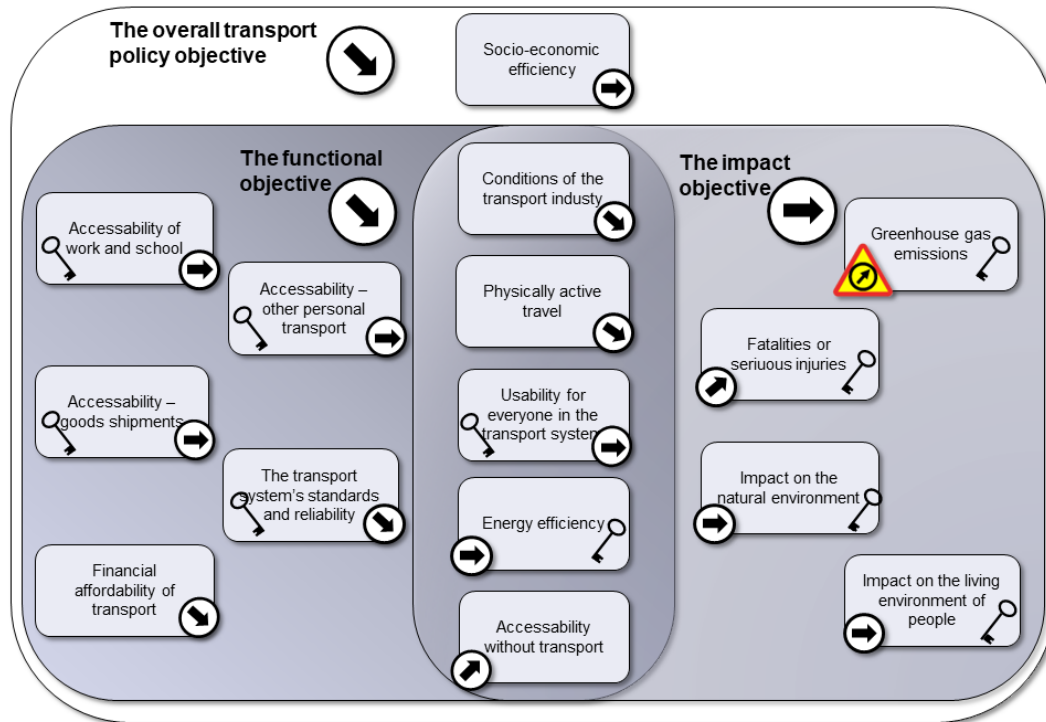


Figure A. Evolution of the 15 indicators used to assess the state of the transport system. An upward arrow means that the indicator has trended in the direction indicated by the objective, while a downward arrow means that the trend has, at least in part, been away from the objective. A horizontal arrow means that the overall status is considered to be at a level corresponding to when the objectives were adopted in 2009. The warning sign indicates that we find that an intermediate objective is not being achieved on time.

The Functional Objective

The design, function and use of the transport system shall contribute to supplying everyone with basic accessibility to transport 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.



Overall, the status of the functional objective has trended negatively since the adoption of the objectives. Most concerning is the evolution of the transport system in terms of standards and reliability. The negative trend that has been evident for an extended period in terms of insufficient reliability continued in 2022, a year with normal operating levels with regard to rail transport. Road transport is exhibiting a negative tendency as well. This is troubling, as it may be viewed as being symptomatic of a transport system that is not meeting the basic requirements to which it is subject.

Interregional accessibility has also trended negatively in recent years, even though, based on a recovery in 2022, we consider it to be on a par with when the objectives were adopted. Financial affordability is considered to have decreased over time. Given also the fact that the number of C- and D-class driving licences has decreased even as the median drive age has continued to rise, and the fact that the travel industry was very negatively affected by the Covid pandemic, our conclusion is that the indicator pertaining to the conditions affecting the

transport industry has trended negatively. The input data upon which our assessment of the evolution of the accessibility of goods shipments is based have been limited this year, because of the pandemic. However, the accessibility of goods shipments is, despite the lack of data, believed to be on the same level as when the transport policy objectives were adopted. There are also bright spots and signs of a positive trend. Digitalisation continues to progress in a positive direction, thereby expanding the means available to achieve accessibility without the use of transport. Unfortunately we also perceive a health risk in the tendencies toward increased sedentary behaviour and less active travel. The transport sector is showing some minor positive signs of increased energy efficiency, although the results are still modest in terms of both energy efficiency among various methods of travelling and in the form of a transition to more energy-efficient modes of transport. There are, for all metrics and indicators, clear signs of geographic differences in terms of accessibility, differences that are also tending to grow over time. Regions with relatively high accessibility are tending to develop positively, while those with less favourable conditions and assumptions are developing negatively, or positively but at a slower pace.

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 so it contributes to the overall generational goal for the environment and environmental quality goals, and to improved health.



Two key indicators for the impact objective, i.e. *Greenhouse gas emissions* and *Fatalities and serious injuries* have clearly trended positively since 2009. In the case of *Fatalities and serious injuries* we find that the trend is in a direction consistent with the transport policy objectives. Our assessment with regard to *Greenhouse gas emissions* is that this indicator is moving in the right direction, but at a pace which is insufficient to make it likely that the 2030 intermediate objective will be achieved. Our preliminary figures for the last year indicate that emissions from domestic transport have decreased as a result of increased biofuel use and continued rapid electrification with respect to new car sales. On the other hand, emissions from domestic and foreign aviation have increased, as is presumably the case for foreign maritime operations as well, where the number of port calls has increased compared to earlier years.

Energy efficiency is improving, mainly with respect to road transport. Lower utilisation rates due to the Covid pandemic led to an increase in energy use per person/kilometre in both domestic aviation and rail transport in 2020 and 2021, although domestic aviation did recover somewhat in 2021. At the same time, the share of trips made by car increased, and no clear transition to more energy-efficient modes of transport is evident in the transport mileage statistics.

With regard to the indicator *Impact on the natural environment* we are still lacking a finalised key metric for *Landscape-adapted infrastructure*, which we intend to use in our assessment. Our assessment is based instead on a number of metrics which collectively attempt to capture important aspects of the way in which the impact of the transport system on the natural environment is changing over time. These metrics yield a slightly fragmented picture, with some trending in the desired direction, and others not doing so. Our assessment from previous years, i.e. that this impact has not changed decisively since the objectives were adopted, remains valid.

The indicator *Impact on the living environment of people* contains a few key metrics that evince a positive trend. This pertains to links to air pollution in urban areas, where both particulate and nitrogen dioxide contents are trending in the desired direction. However,

problems with noise appear to persist, and are considered to remain at roughly the same level as when the objectives were adopted. There are significant differences across the country in this regard.

Of the supplemental indicators included in our assessment of the impact objective, only *Accessibility without transport* is trending favourably. None of the key indicators for the impact objective is trending negatively. Our overall assessment is thus that the state of the transport system in terms of the impact objective is on a level that is comparable to when the objectives were adopted.

Transport Analysis is a Swedish agency for transportpolicy analysis. We analyse and evaluate proposed and implemented measures within the sphere of transportpolicy. 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.



Transportanalysis
Rosenlundsgatan 54
SE-118 63 Stockholm

Phone +46 10 414 42 00
trafikanalys@trafa.se
www.trafa.se