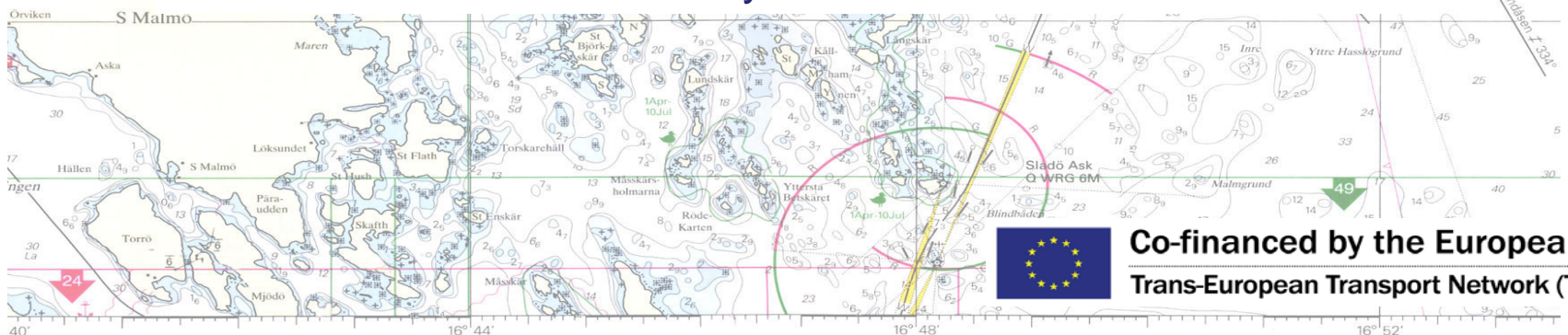


Baltic Transport Outlook 2030

TransBaltic Annual Conference 11 May 2011

Helena Kyster-Hansen



Co-financed by the European Union
Trans-European Transport Network (TEN-T)

First 24 projects
of the Baltic Sea Region Programme
contributing to the **4 pillars** and **15 priority areas**
of the EU Strategy for the Baltic Sea Region

**BTO is part of the
Baltic Sea Strategy**

I To Make The Baltic Sea Region An Environmentally Sustainable Place		II To Make The Baltic Sea Region A Prosperous Place		III To Make The Baltic Sea Region An Accessible And Attractive Place		IV To Make The Baltic Sea Region A Safe And Secure Place	
1. To reduce nutrient inputs to the sea to acceptable levels	<i>WATERPRAXIS</i>	6. To remove hindrances to the internal market including to improve cooperation in the customs and tax area		10. To improve the access to, efficiency and security of the energy markets	<i>Bioenergy Promotion</i> ★	13. To become a leading region in maritime safety and security	<i>EfficienSea</i> ★
2. To preserve natural zones and biodiversity	<i>Baltic Green Belt</i>	7. To exploit the full potential of the region in research and innovation	<i>BaltFood BONITA BSR_CBP BSR InnoReg</i>	11. To improve internal and external transport links		14. To reinforce protection from major emergencies at sea and on land	<i>BRISK</i> ★ <i>BALTRAD</i> (<i>Baltic Master II</i>)
3. To reduce the use and impact of hazardous substances	<i>COHIBA</i>	8. To promote entrepreneurship, strengthen SMEs and increase the efficient use of human resources	<i>JOSEFIN</i> ★ <i>BSLN</i> ★ <i>SPIN</i> ★ <i>BASIC</i>	12. To maintain attractiveness of the Baltic Sea Region for its citizens and to reinforce attractiveness for tourists	<i>NEW BRIDGES Parks & Benefits</i>	15. To decrease volume of, and harm done by, cross border crime	
4. To become a model region for clean shipping	<i>Baltic Master II</i>	9. To reinforce sustainable agriculture, forestry and fishing					
5. To adapt to climate change	<i>Longlife (Baltic Green Belt) BaltCICA Eco-Region BalticClimate Urb. Energy</i>						

Horizontal Actions of the Strategy
Building a regional identity
Maritime Spatial Planning

(*BaltFood*)
BaltSeaPlan

Status: May 2009

**BALTIC
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Aim of the study

The overall aim is to achieve better prerequisites for national long term infrastructure planning in the Baltic Sea region to make the region more accessible and competitive.

The study should contribute to:

1. A common view of the region's development concerning transport flows and economic growth
2. A joint awareness of future challenges and potentials
3. Better knowledge exchange of national and regional transport systems



Geographical scope



Norway, Sweden, Finland, Estonia, Latvia, Lithuania, Poland, Denmark

Part of Russia: Kaliningrad Oblast, St. Petersburg, Leningrad Oblast, Karelia Republic, Murmansk Oblast, Novgorod Oblast and Pskov Oblast

Part of Germany: Berlin, Brandenburg, Mecklenburg-Vorpommern, Schleswig-Holstein, Hamburg, Bremen and part of Niedersachsen

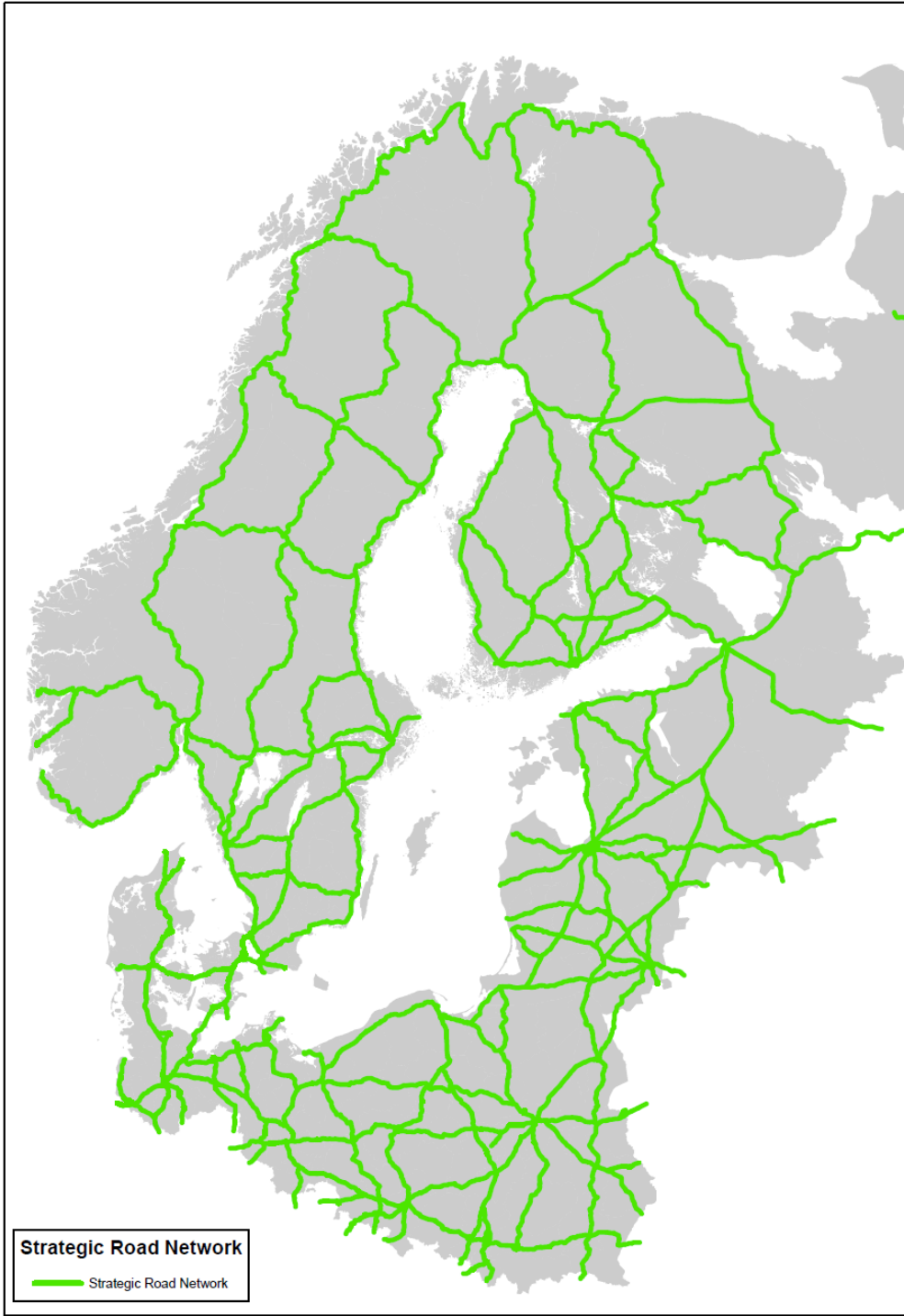


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BTO 2030: Task 1: Strategic Network Methodology

The strategic network should:

- 1. Contribute to a strengthening of the internal market mechanism in the Baltic Sea Macro-Region, providing improved sustainable accessibility from peripheral regions to the centre and between peripheral regions themselves.
- 2. Improve territorial, economic and social cohesion in the Baltic Sea Macro-Region
- 3. Improve accessibility between the Baltic Sea Macro-Region and the surrounding world in order to facilitate passenger and trade flows.
- 4. Facilitate sustainable transport solutions



Proposed strategic network for road transport

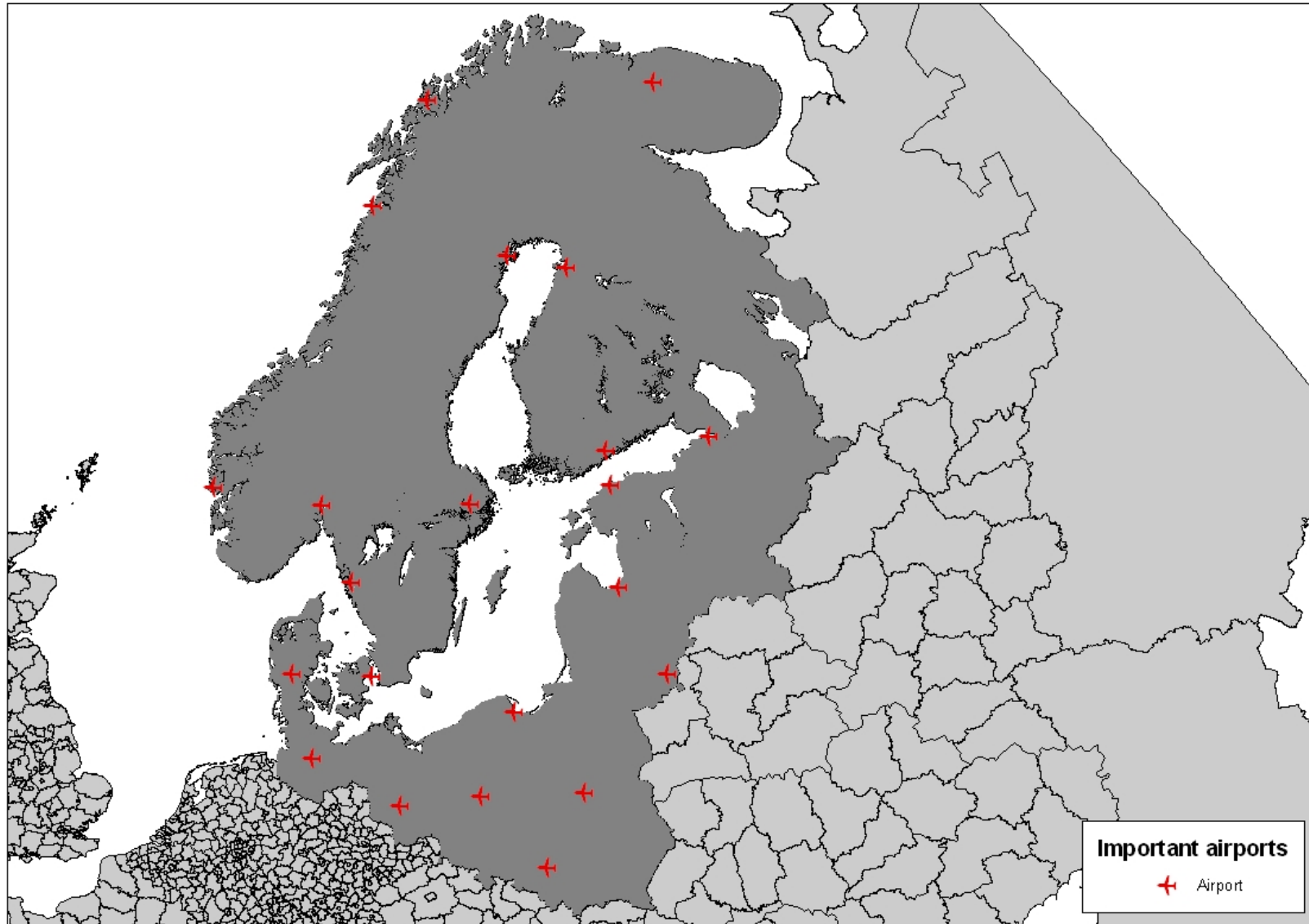
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Proposed strategic network for rail transport

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BTO 2030: Task 1: Strategic Network Methodology



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- Container / RoRo
- Bulk cargoes
- Other strategically important ports



Proposed strategic network for ports

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A map of the Baltic Sea region showing the locations of 15 ports. The map includes Sweden, Finland, and Estonia. Ports marked with black dots are Tornio, Kemi, Oulu, Raahе, Kalajoki, Kokkola, Pietarsaari, Vaasa, Sundsvall, Skärnäs Terminal, Söderhamn, Gävle, Umeå, Skellefteå, Piteå, and Luleå. Husum is marked with a blue dot. A scale bar (0-200 km) and a north arrow are in the top right.

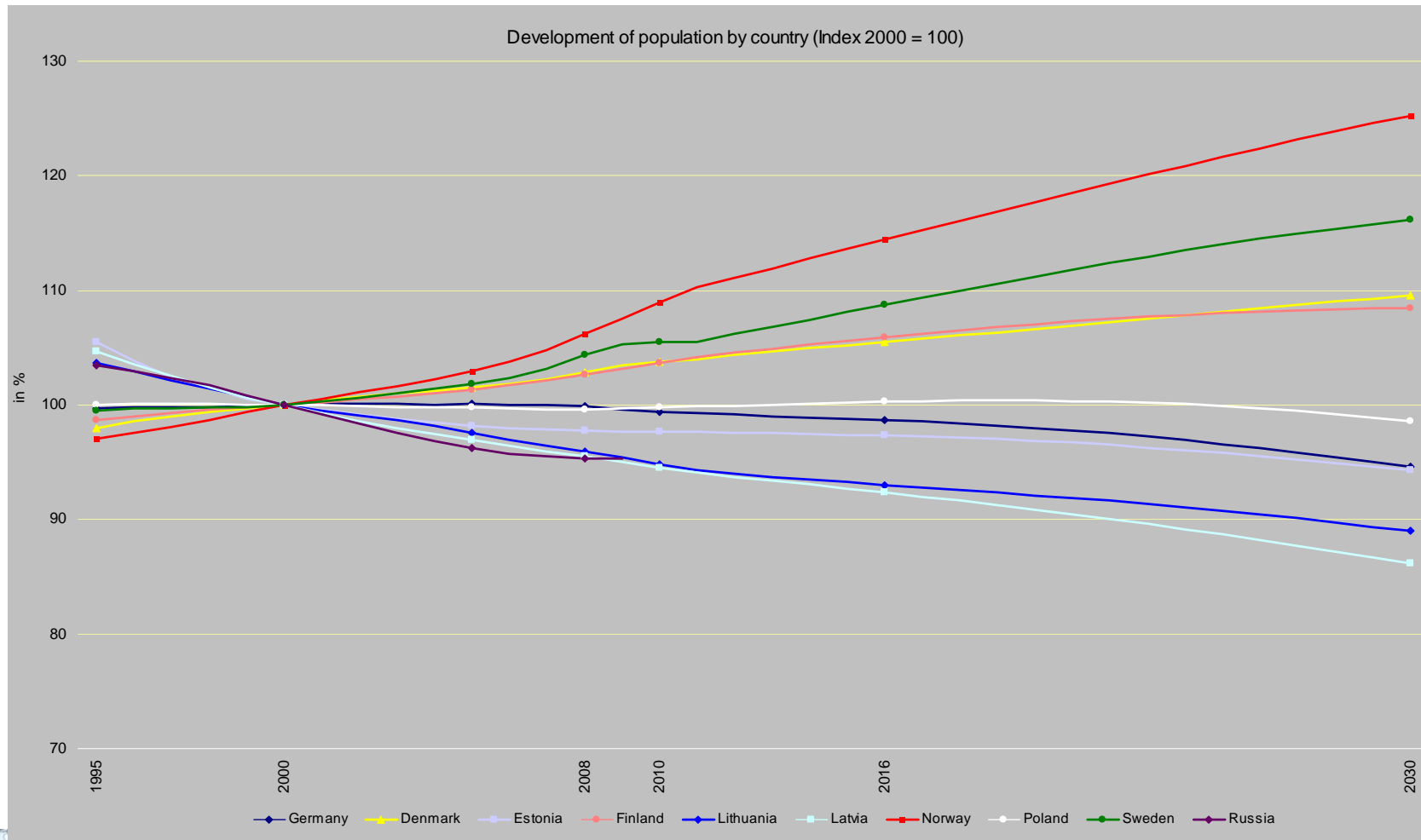
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A map of the Baltic Sea region showing the locations of 15 ports. The map includes Sweden, Finland, and Estonia. Ports marked with black dots are Tornio, Kemi, Oulu, Raahе, Kalajoki, Kokkola, Pietarsaari, Vaasa, Sundsvall, Skärnäs Terminal, Söderhamn, Gävle, Umeå, Skellefteå, Piteå, and Luleå. Husum is marked with a blue dot. A scale bar (0-200 km) and a north arrow are in the top right.



BTO 2030: Task 2: Drivers for Transport

Population development 1995 - 2030



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Key drivers and trends

Population change (size and composition)

Declining household size (more single person households)

Technological progress (electronic devices, nano)

New developments in the transport sector (new fuel types)

Climate change (transport 27% of CO2 emissions) ETS in the future for all transport

Institutional reforms and opening up of markets (Russia)

Economic convergence, capital mobility

Economic development

Decreasing cost of spatial interaction (globalisation, economy of scale in transport)

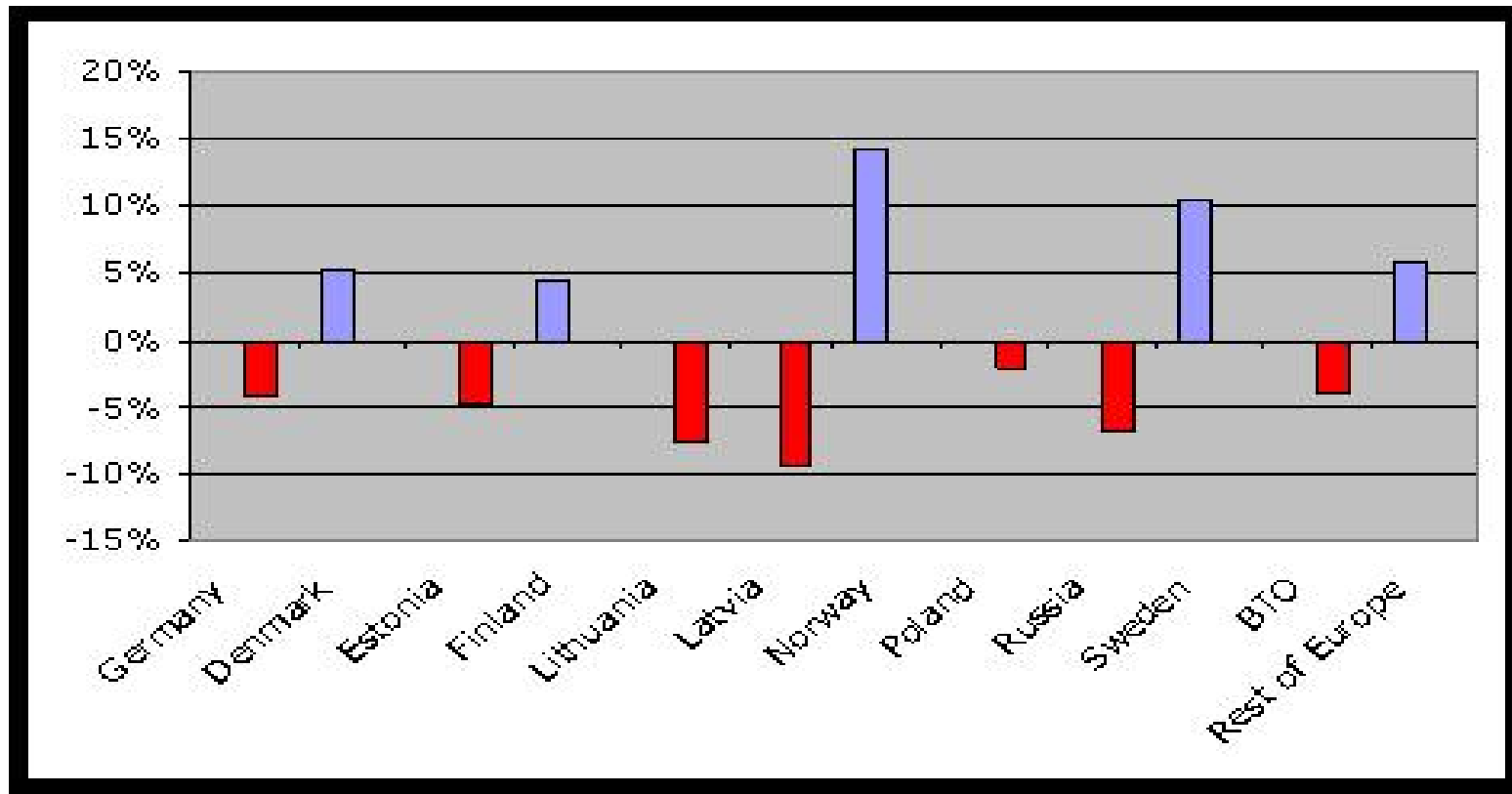
Environmental protection

Extension of EU (a bigger common market, possibly from 500 to 700 m people)



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BSR population development 2009 - 2030

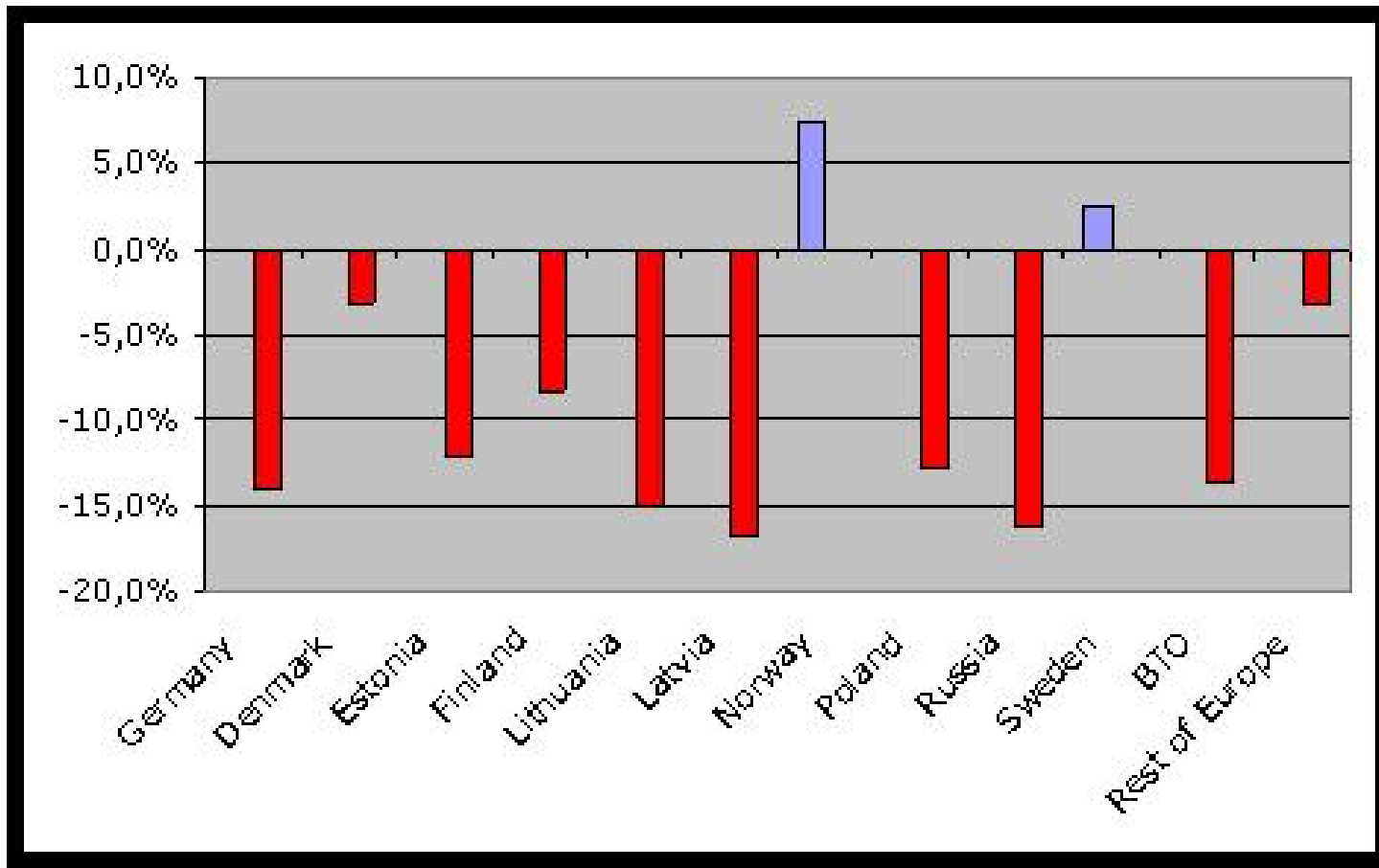


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BSR employment development 2009 - 2030

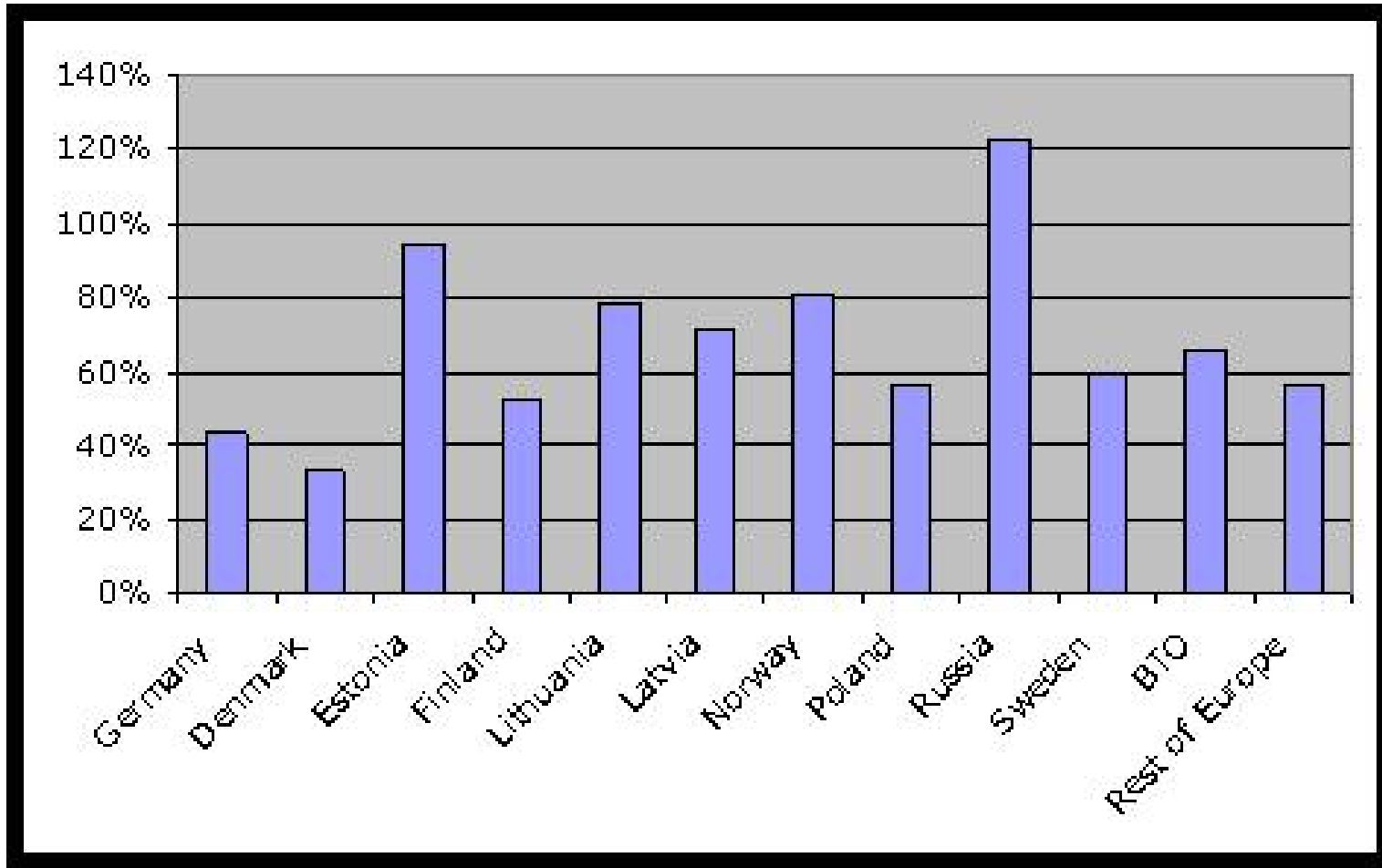


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BSR GDP development 2009 - 2030

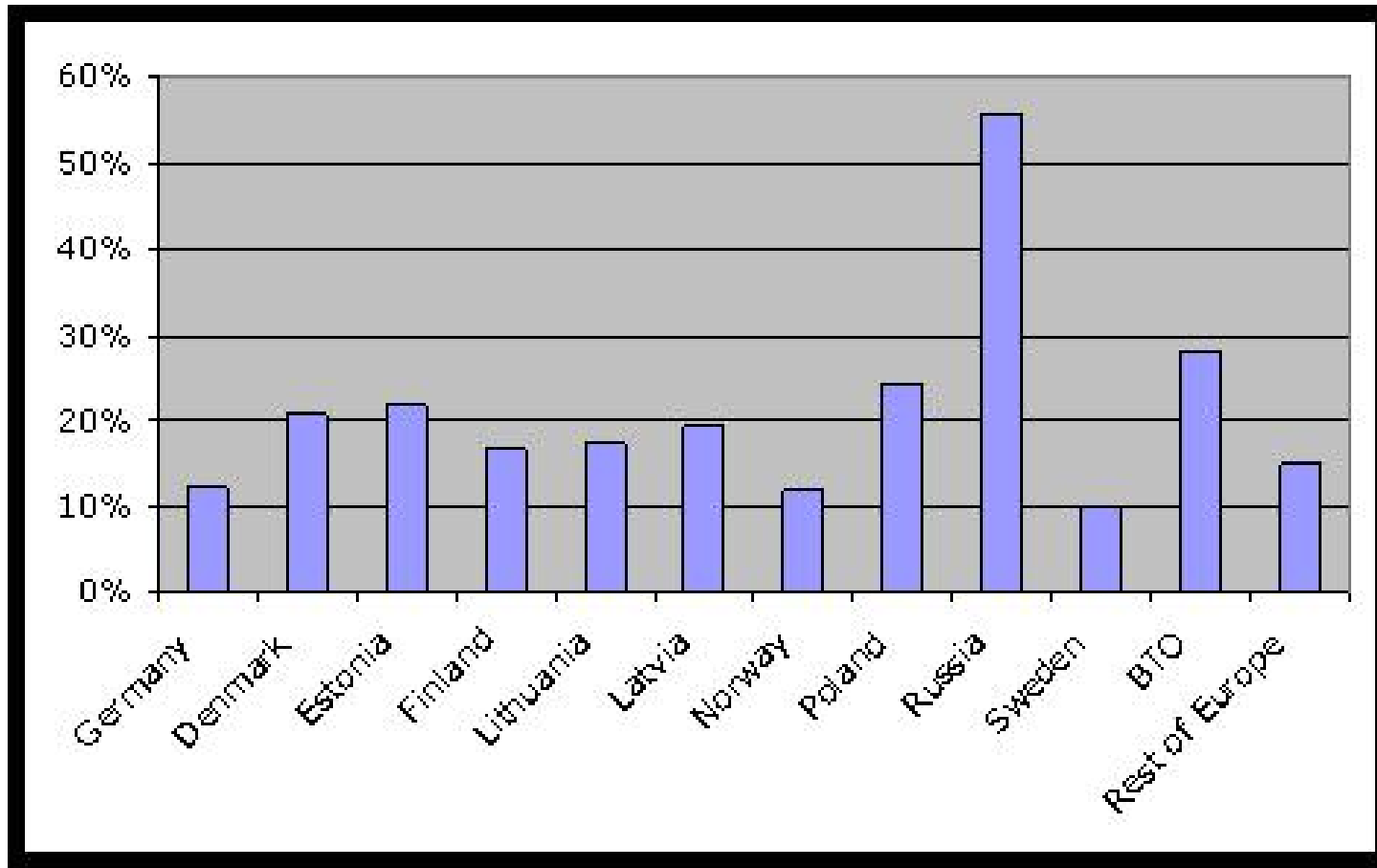


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BSR Carownership development 2009 - 2030



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BSR: Other measures

Technological development: Safer, cleaner and more efficient transport modes.

**Development of Sea transport modes with less negative impacts:
Spill, emission, safer constructions, taking into consideration the ice
caps.**

Transport costs:

Cost per km or cost per hour.

Depend on many issues including:

Engine technology, fuel price, wages



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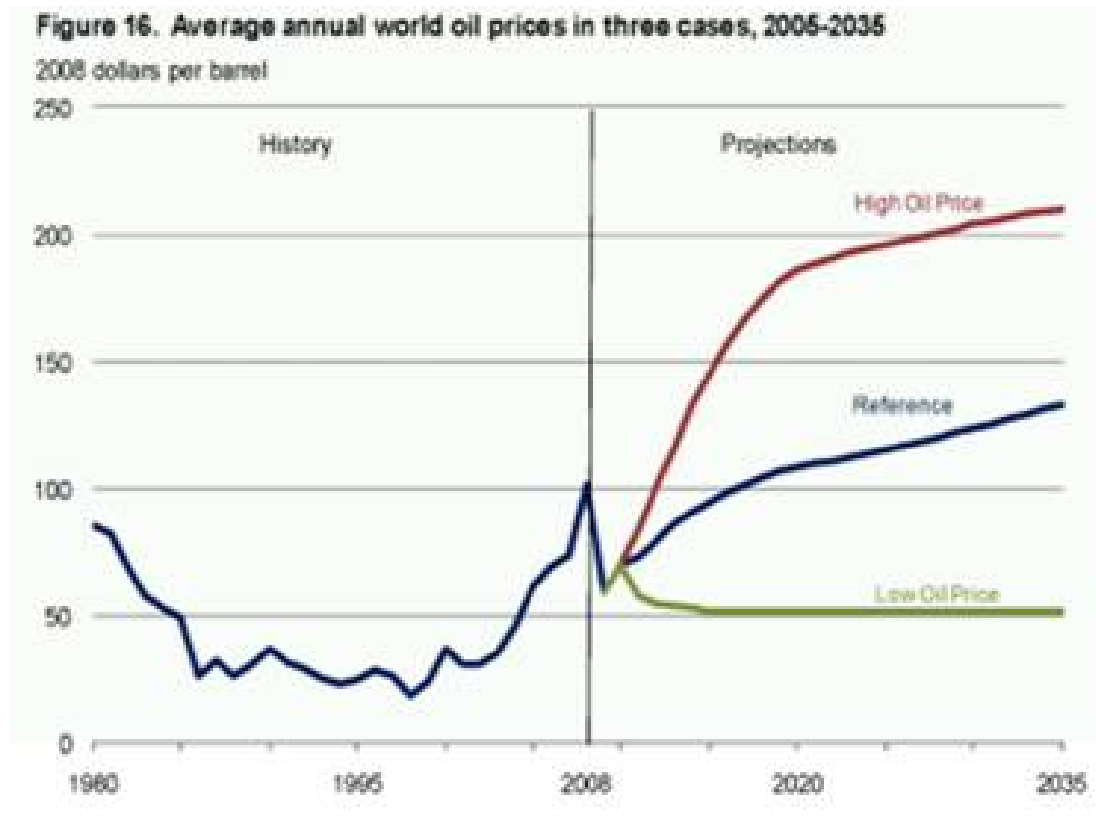
**Based on likely development trends for population and economy, e.g.
The EU Commission's ITREN study Baseline and TENConnect 2**

- 1. Road fuel price at higher level (x% higher than BTO2030 Baseline)**
- 2. Road toll system (km-tax) for cars/trucks of x% on Core network only**
- 3. Road toll system (km-tax) for cars/trucks of x% on Core network + comprehensive network**
- 4. Rail freight + x%**
- 5. Rail passenger + x%**



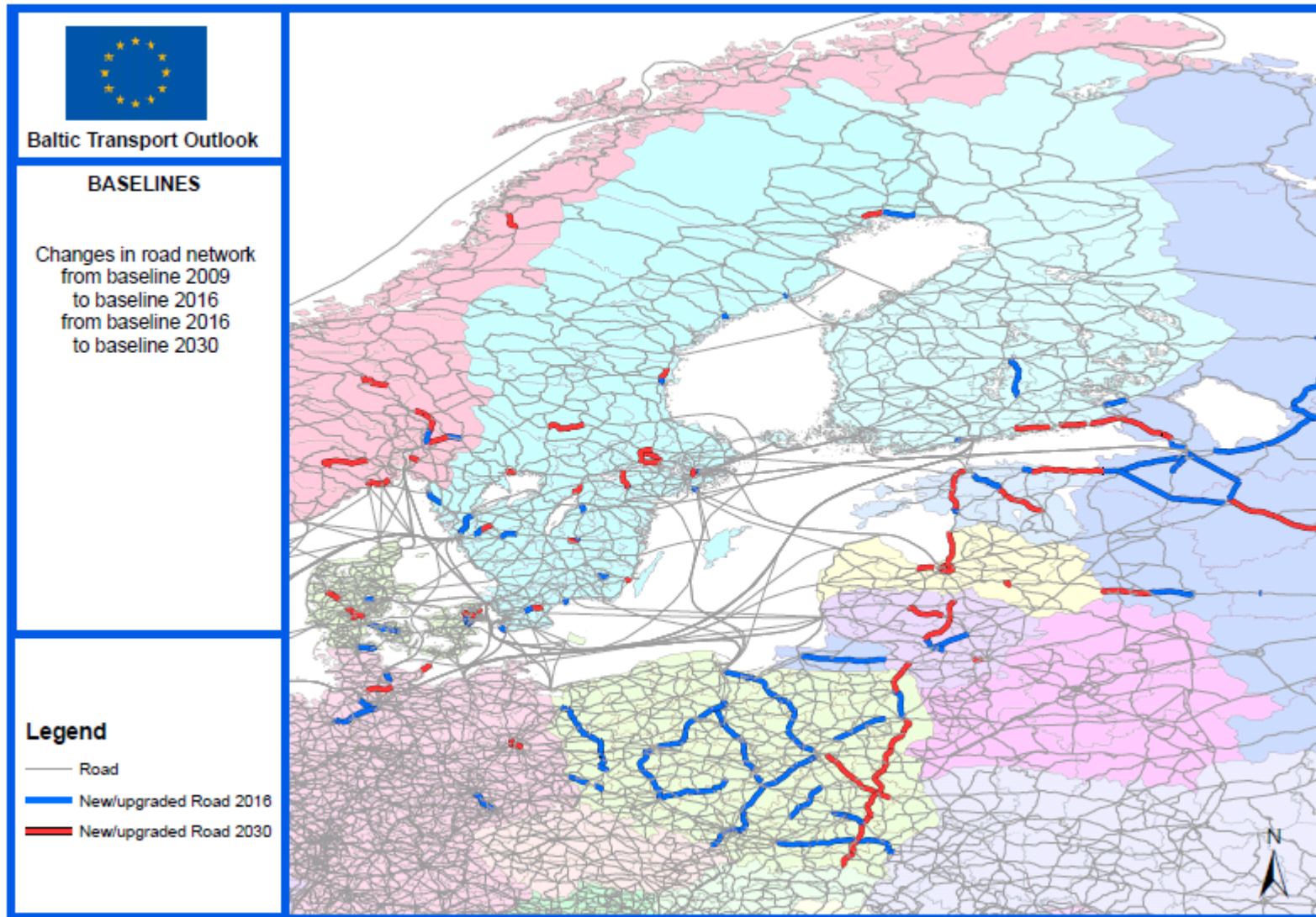
BSR: Transport costs

Oil price development in 2008 USD per barrel



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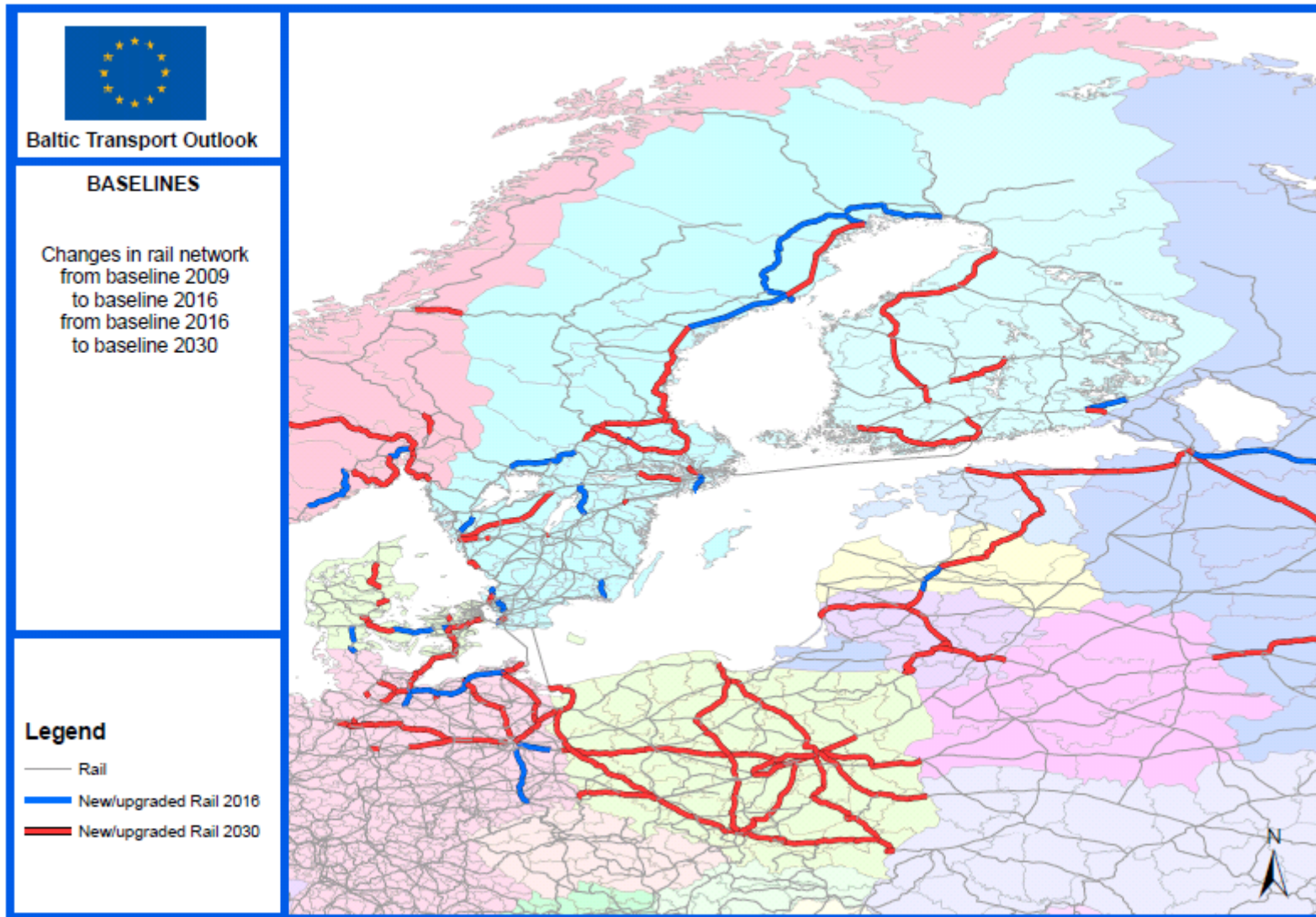
BSR: Network development, Road



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BSR: Network development, Rail



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Methodology

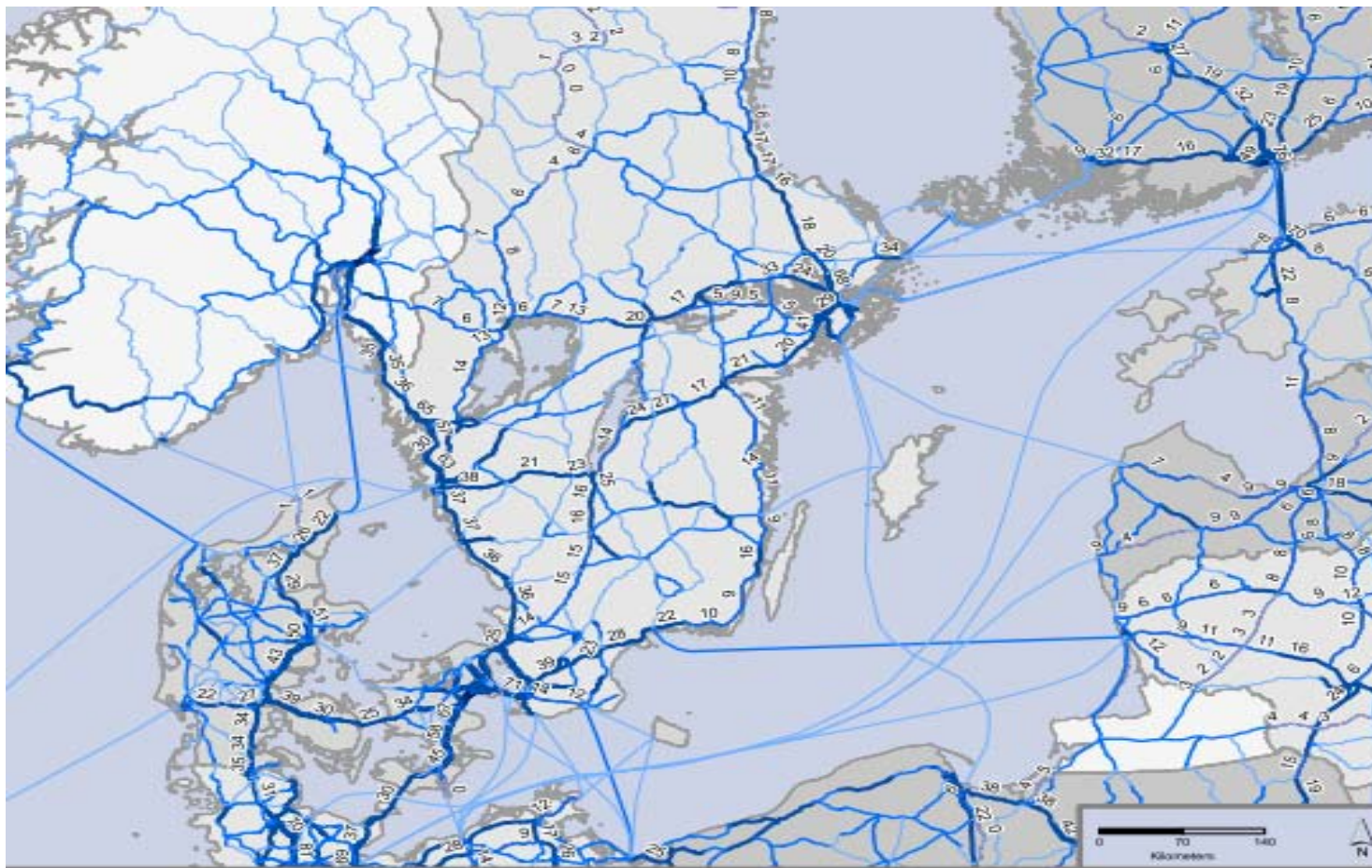
- **TRANSTOOLS**
- **Data collection – eg. Concerned countries**
- **Analyses and assessments**

Not a model development study!



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Road flows – Baseline 2030 - Draft



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Road flows – Baseline 2030 - Draft



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Road flows – Baseline 2030 - Draft

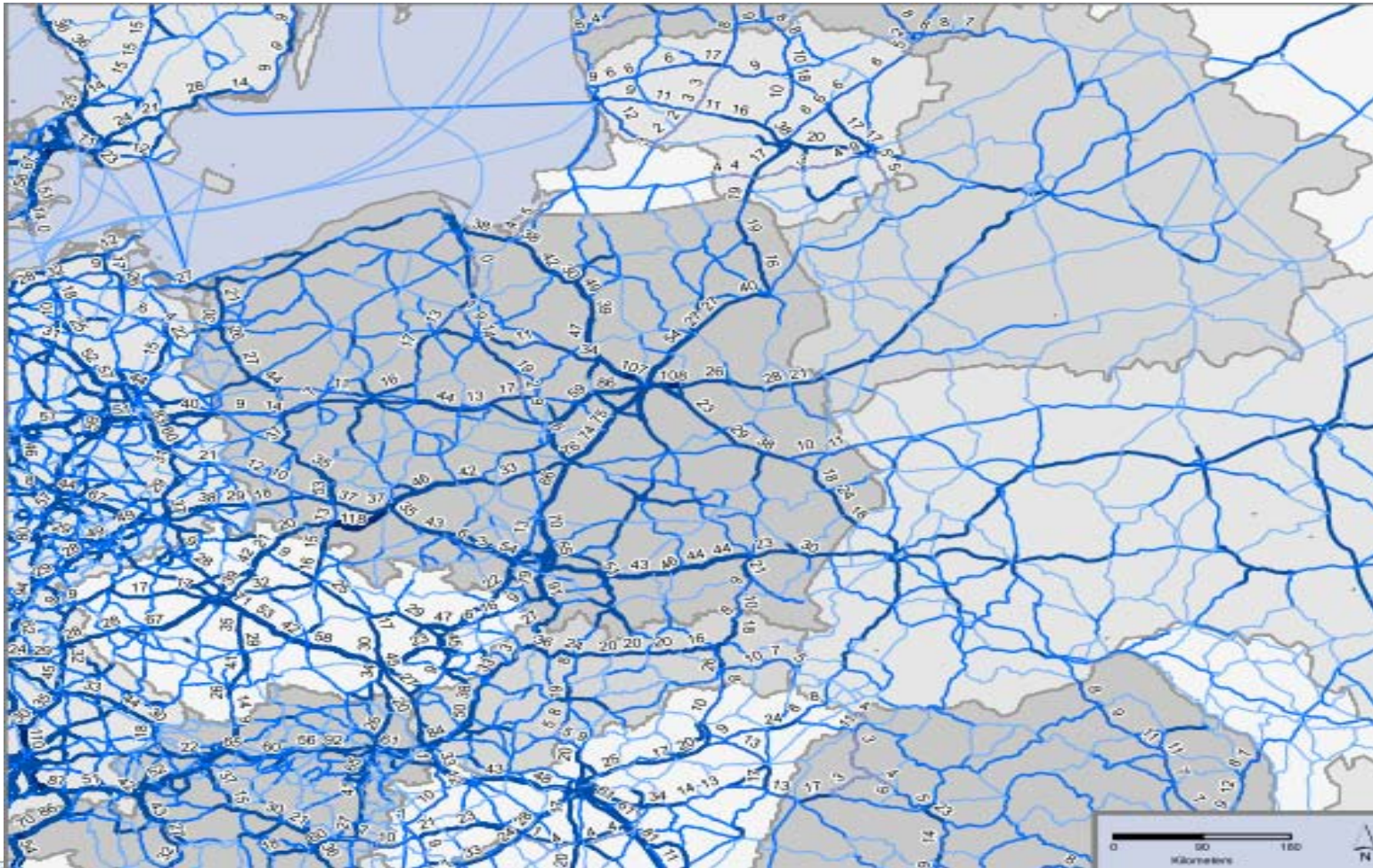


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Road flows – Baseline 2030 - Draft



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Road flows – Baseline 2030 - Draft



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The BTO process – remaining work



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Ongoing work

- **Task 3 – Scenarios**
- **Task 4 – Analysis of results**
 - **Flows**
 - **Terminals**
 - **Bottlenecks**
 - **Functionality – Accessibility and Interoperability**
 - **Environmental impact**
 - **Region's role**
- **Task 5 - SWOT**
- **Task 6 – Infrastructure planning**



Time table – the process

	2010																2011											
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12				
Work of the secretariat																												
Procurement of consultant																												
Preparation of tender																												
Tender process																												
Evaluation process																												
Work of the consultant (16)																												
Written reports from consultant (5)																												
Reporting to steering committee (5)																												
Dissemination																												
Implementation																												



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Factors for success

- Cooperation!
- Engagement and active participation from all countries
- Anchoring results during the study on a local/regional and national level
- Spreading the end-results
- Learning about and establishing contact at an early stage with other relevant EU-projects
- Be inspired by all the other initiatives instead of being frustrated



www.baltictransportoutlook.eu

Baltic Transport Outlook 2030 - Microsoft Internet Explorer provided by WSP Group

http://www.baltictransportoutlook.eu/

File Edit View Favorites Tools Help

Baltic Transport Outlook 2030

BALTIC TRANSPORT OUTLOOK 2030



START ABOUT THE PROJECT ORGANISATION PRESS CONTACT

Baltic Transport Outlook 2030 is an EU funded project and a strategic priority within the Baltic Sea Strategy that was adopted by the European Council in October 2009.

The overall aim of the project is to achieve better prerequisites for national long term infrastructure planning in the Baltic Sea region to make the region more accessible and competitive. The Baltic Transport Outlook will hopefully contribute to:

- A common view of the region's development concerning transport flows and economic growth
- A joint awareness of future challenges and potentials
- Better knowledge exchange of national and regional transport systems.

The core of the project is a study which will map the transport infrastructure and the flows of goods and passengers – between the countries in the region and between the region and other areas. Scenarios will be presented for developments until 2030. These scenarios will be the basis for discussions with and recommendations to infrastructure planners and other decision makers throughout the region on how to tackle future challenges. The project will be completed in December 2010.



Done

Start

Presentation BTO_Sc... Baltic Transport Outlo...

Internet 100%

12:52

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