VASAB Study on Accessibility in the Baltic Sea Region

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What is accessibility?

• main "product" of the transport system

• determines the locational advantage of an area relative to all areas

• measures the benefits households and firms enjoy from the existence and use of transport infrastructure

• areas with better access to the locations of input materials and markets will, ceteris paribus, be more productive, more competitive and more successful than remote areas
1
Accessibility potential in the BSR 2006-2016
Accessibility and economic performance

GDP (PPS) per capita (EU=100)

Multimodal accessibility (EU=100)
2

Maritime accessibility
3

Effects of TEN-T investments on potential accessibility of the BSR
4

Policy conclusions
General Conclusions (1)

• Accessibility is an **essential location factor**
• Important role of the **TEN-T for territorial development and territorial cohesion**
• Development of the TEN-T will yield a lot of improvements in the regional, national and international **connectivity**
• In particular the investments into a **high-quality rail network** might bring enormous advantages for the affected regions (ex. the strong effects of the future Rail Baltica).
• Improvement are often **territorially selective**.
General Conclusions (2) maritime

- Relatively dense chain of very distinct types of maritime ports: big multipurpose ports, ports having passenger or goods transport only, ports with specialised goods categories, ports having only ferry traffic or pure touristic marinas.

- The development of maritime passenger and freight traffic during the last ten years has been very heterogeneous. On the Baltic Sea container transport developed rapidly.

- Container traffic has a high degree of concentration (St. Petersburg, Gdansk/Gdynia). The role of ports on the southern Baltic coast is growing.

- Maritime and hinterland accessibility as enabling factors for handling of passenger (touristic) and maritime freight traffic.
General Conclusions (3)

• BUT: Transport infrastructure development is not the only and maybe not the most important issue to take care of.

  --> For territorial cohesion this means that multi-challenged regions need comprehensive strategies to develop their assets and to develop them as attractive locations to live and to develop competitive economic activities.

  --> The development of high-quality transport infrastructure and connections can only be one element in such strategies aiming at territorial cohesion.

• Accessibility and BSR infrastructure development strongly depend on geopolitical and demographic factors.
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Recommendations (1)

- TEN-T corridors along southern Baltic Sea Coast (Via Hanzeatica)
- Rail Baltica important for goods traffic; in case of passenger traffic (high speed connection) decisions should be careful
- Belarus corridors are underused in BSR transport network because of geopolitical reason
- High importance of the CEF mechanism – chance for transborder connectors
- Potential for the high speed rail: Hamburg-Copenhagen-Stockholm; Berlin-Warsaw
- Potential for multimodal solutions (East-West freight rail transport)
Recommendations (2)

• Cross-Baltic ferry connections should be more frequent (for better use of the new north-South road and rail infrastructure in Central Europe, by Scandinavian flows)
• Development of sea transport (mainly containers) in Gdansk, Klaipeda and Riga should be followed by rail and intermodal solutions inside Poland, Lithuania and Latvia (otherwise road freight traffic will increase significantly)
Geopolitical factors of BSR transport infrastructure development

• Kaliningrad Oblast gap (lack of modern infrastructure close to the Baltic Sea southern coast – Via Baltica and Rail Baltica routes)
• Main HGV transit (RUS-EU) traffic directions. Concentration on Via Baltica, Belarus bypassing
• Rail Baltica needs Sankt Petersburg potential?
• Grodno rail corridor and Rail Baltica investment
• Ukrainian Crisis and traffic directions
Demographical factors of BSR transport infrastructure development

• Depopulation of Baltic States and Eastern Poland as well as some oblast’s of Belarus and Russia
• In some regions accessibility decreased because of depopulation (road: Eastern Belarus, Russian Keralia, Northern Norway).
• In other depopulation was balanced by transport infrastructure development (Lithuania, Latvia, North-Eastern Poland)
• Population concentration in BSR metropolitan areas
• The accessibility is increasing in the metropolitan areas partly because of the population growth. In the case of multimodal indicator air transport is very important. On the other hand the road and rail transport systems are still insufficient in some big agglomerations.