

Summary

Following a decrease in mobility levels due to the effects of the economic crisis, traffic volumes are again expected to increase from 2010 to 2015. Road traffic is expected to increase at a faster rate over the next 5 years than during the previous 5 years. This implies increased congestion levels. Over the past year, a small decrease in traffic volumes has led to a much larger decrease in delays caused by congestion. In the coming years, a reversal of this development is expected. The government objective of reducing congestion cannot be achieved under the current policies. The economic crisis had a much greater impact on freight transport and the aviation sector, both of which are strongly dependent on international developments. As the economy recovers, both freight transport flows and the number of airline passengers will also increase rapidly.

Growth in nearly all transport modes

Even with limited economic growth mobility will increase in all transport modes in the medium term, with the exception of regional public transport.

In 2015 the number of kilometres travelled by car is expected to be 14 percent higher than in 2010 with average economic growth. If the expected economic growth is lower, that figure will be 12 percent, and if economic growth is higher, the growth figure will be 17 percent.

Depending on the rates of economic development, the growth of passenger travel by train from 2010 and 2015 is estimated at 6 to 11 percent. If the economy grows at an average rate, a growth of 9 percent is expected in the coming 5 years. This would represent a quarter less growth than over the previous 5 years. (2006-2010).

Based on developments over the past 10 years, the number of passenger kilometres travelled using regional public transport services – bus, tram and metro – is expected to remain relatively constant.

Following a sharp decline in 2009, the number of passengers using airports in the Netherlands is expected to increase from 2010 to 2015. The estimated average growth rate is 11 percent. Depending on whether the economy

grows at a faster or slower rate during this time period, passenger numbers will increase more (16 percent) or less (6 percent).

Sharp rise in cargo transfers

In the first half of 2010, we witnessed a sharp rise in cargo transshipment at sea ports and airports, as compared to the first half of 2009. This growth was closely connected to the replenishing of stocks. Later this year, this effect will lessen in importance and result in a slower growth rate.

In 2015, freight transport on Dutch territory (roads, inland waterways, railways and pipelines) will once reach the levels achieved prior to the economic crisis. Cargo transshipments at sea ports and airports will increase much faster due to the upturn in global trade. By 2011 cargo transshipments are expected to reach their pre-crisis volumes.

Between 2010 and 2015, we estimate the growth of freight transport on Dutch territory to be 12% (with a minimum of 6 percent and a maximum of 17 percent). The estimated growth rate for seaport transshipment during this period is 16 percent (minimum 11 percent and maximum 23 percent), and for the aviation sector 30 percent (minimum 22 percent and maximum 38 percent).

Delays due to traffic jams rise by 16 percent

Owing to the economic crisis, in 2009 car drivers experienced 10 percent less congestion on the main motorways. Due to the economic upturn, however, traffic congestion will again increase in the medium term. Based on an average economic growth rate of 1¼ percent per year, the congestion levels on the main motorway network will return to pre-crisis levels in 2014. Consequently, in 2015 there will be 16 percent more congestion than in 2010. Future uncertainties on economic development could result in significantly more or significantly less congestion. If the economy grows at a slower rate, the delays over the coming years will still remain below the levels reached prior to the crisis and the expected congestion level in 2015 will only be 4 percent higher than in 2010. If the economy grows rapidly, time loss due to delays in 2015 will increase by 30 percent compared to 2010 levels.

The use of the main motorway network reaches maximum capacity at increasingly more places and during an increasingly larger share of the day. A small increase in traffic volumes will therefore lead to a much greater increase in traffic jams and congestion. In the Nota Mobiliteit, the government set the objective of reducing congestions to 1992 levels by 2020. This objective will however not be achieved without a change in policy, even if the economy grows at a slower rate.

Fewer traffic fatalities

In the traffic safety strategic plan, the stated objective is to reduce the number of traffic fatalities to a maximum of 750 in 2010, and a maximum of 500 in 2020. Given equable development, this would mean a decrease to 625 traffic fatalities in 2015. It is estimated that this objective will very nearly be achieved (630 traffic fatalities in 2015).