



Presentation of SCENES Transport demand baseline

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Background

TREMOVE needs TRANSPORT demand forecast as input (**=BASELINE**)

- **Transport volumes :**
How will transport quantities [pkm,tkm] evolve ?
 - Per transport mode / freight category
 - Per region (metropolitan, other urban regions, rural)
 - Per road type
 - Per time period (peak or off-peak)
- **Transport user prices :**
how will tariffs [€/km] evolve ?



Background

European network model 'SCENES' is used to produce baseline:

- Consistent between countries
- Calibrated on Transport In Figures (Eurostat)

Current baseline established for the mid-term review of the 'White Paper on Common Transport Policy'.

Baseline represents 'Partial implementation of White paper' scenario.



Assumptions

Exogeneous assumptions within SCENES :

- Economy - trade
- Population
- Car ownership
- Oil prices and other prices

Assumptions

Annual GDP growth

EU25 :

- 2000 – 2010 : 2.04%
- 2010 – 2020 : 2.24%

(based on DG TREN)

	2000-2010	2010-2020
AT	1.93%	1.95%
BE	2.02%	2.03%
DE	1.24%	1.69%
DK	1.66%	1.52%
ES	2.76%	2.64%
FI	2.34%	1.88%
FR	1.95%	2.06%
IE	5.04%	3.54%
IT	1.19%	2.02%
LU	4.05%	4.83%
NL	1.42%	1.83%
PT	1.28%	2.75%
SE	2.39%	2.32%
UK	2.68%	2.41%
CZ	3.39%	3.34%
HU	3.68%	3.24%
PL	3.92%	4.37%
SI	3.57%	2.41%

Assumptions

Population

	2000-2010	2010-2020
AT	0.30%	0.22%
BE	0.30%	0.22%
DE	0.08%	-0.02%
DK	0.24%	0.11%
ES	1.11%	0.21%
FI	0.23%	0.21%
FR	0.46%	0.33%
GR	0.32%	0.14%
IE	1.30%	0.96%
IT	0.29%	-0.06%
LU	0.84%	0.88%
NL	0.46%	0.32%
PT	0.44%	0.08%
SE	0.35%	0.41%
UK	0.38%	0.32%
CZ	-0.15%	-0.22%
HU	-0.23%	-0.29%
PL	-0.21%	-0.20%
SI	0.13%	0.01%
CH	0.23%	0.08%
NO	0.48%	0.52%

Assumptions

Oil price forecast

Evolution 2000-2020 (DG TREN) :

oil	+40.46%
gas	+146.56%
coal	+42.56%



Assumptions

Policy measures will influence :

- Monetary costs
- Time costs

Assumptions : monetary

Road Freight costs	17%
Rail Freight costs	-3.5%
Ship costs	8%
Inland waterway costs	1.5%
Freight Terminal costs	-8%
Road load factor	2%
Car costs	0%
Bus costs	0%
Rail passenger costs	-1%
Air costs	0%

Assumptions : time

Road Freight time	-1%
Rail Freight time	-13%
Rail border time	-15%
Inland waterway time	-2%
Freight Terminal time	-22%
Car Time	0%
Rail passenger time	-2%
Air time	-5%
PassTerminal / Border time	0%



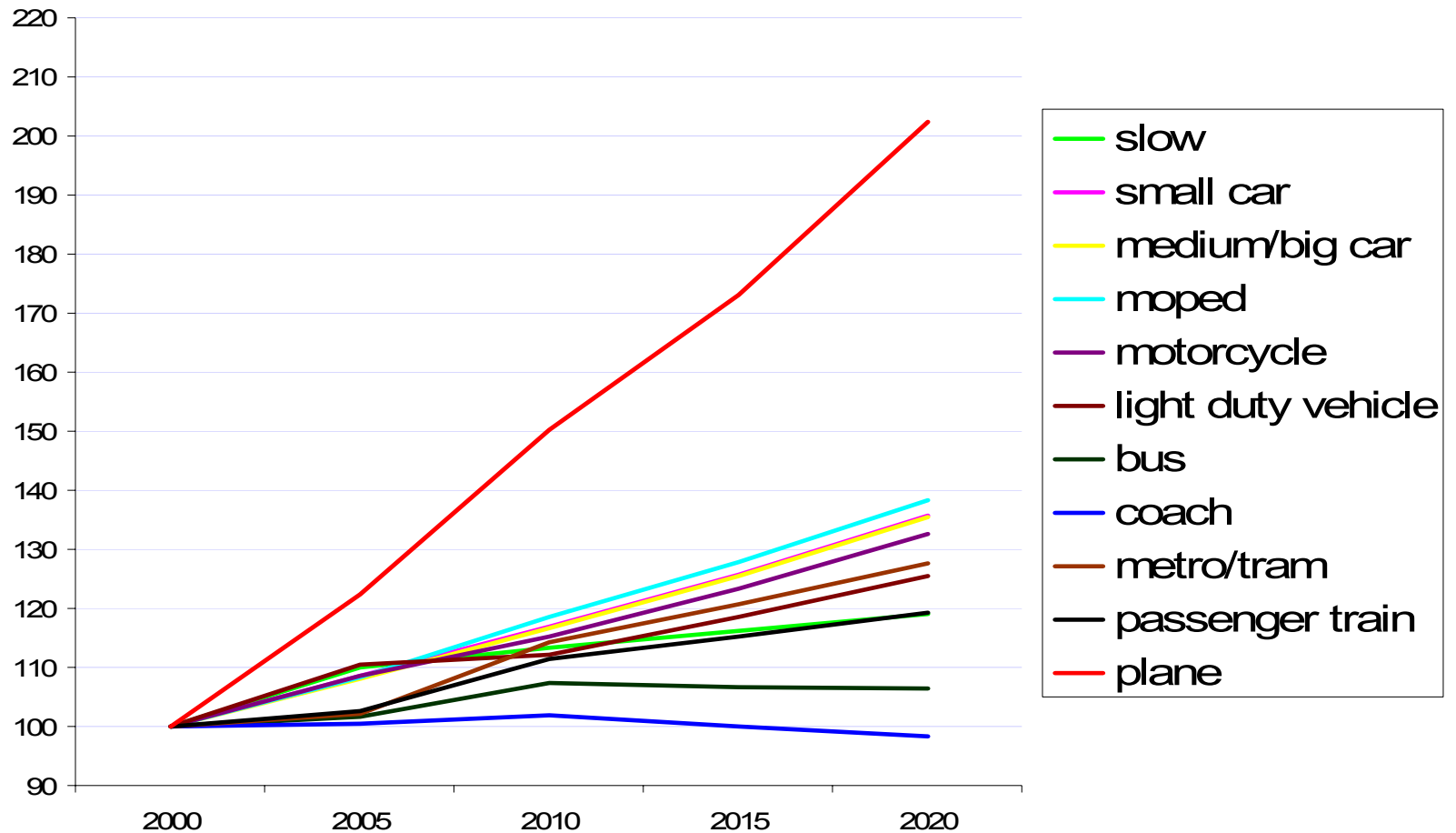
Baseline presentation

- Passenger volumes
- Freight volumes
- Vehicles volumes

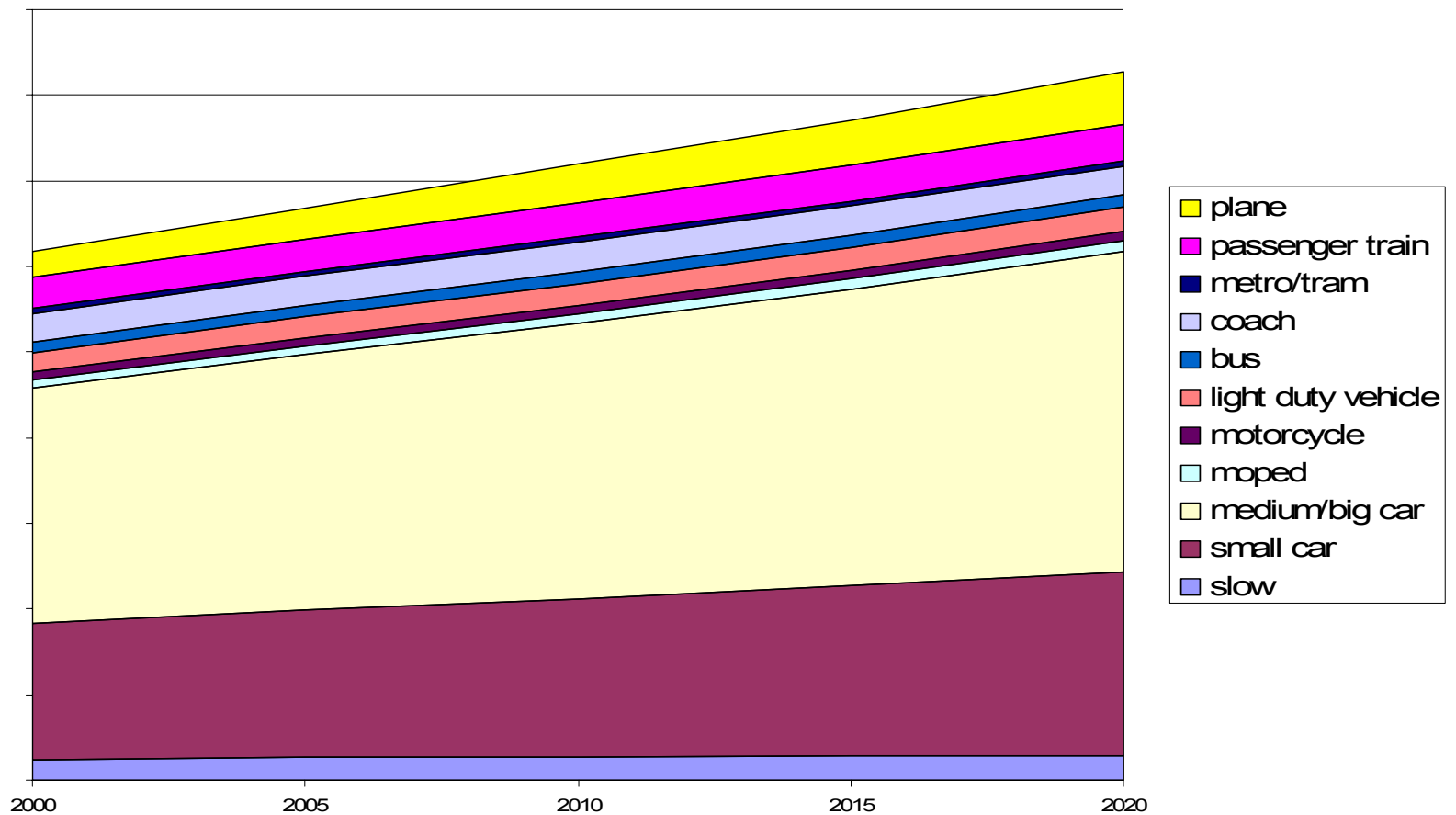
Overview figures of :

EU 15 + 4 NMS (HU, PL, SI & CZ)
+ CH + NO

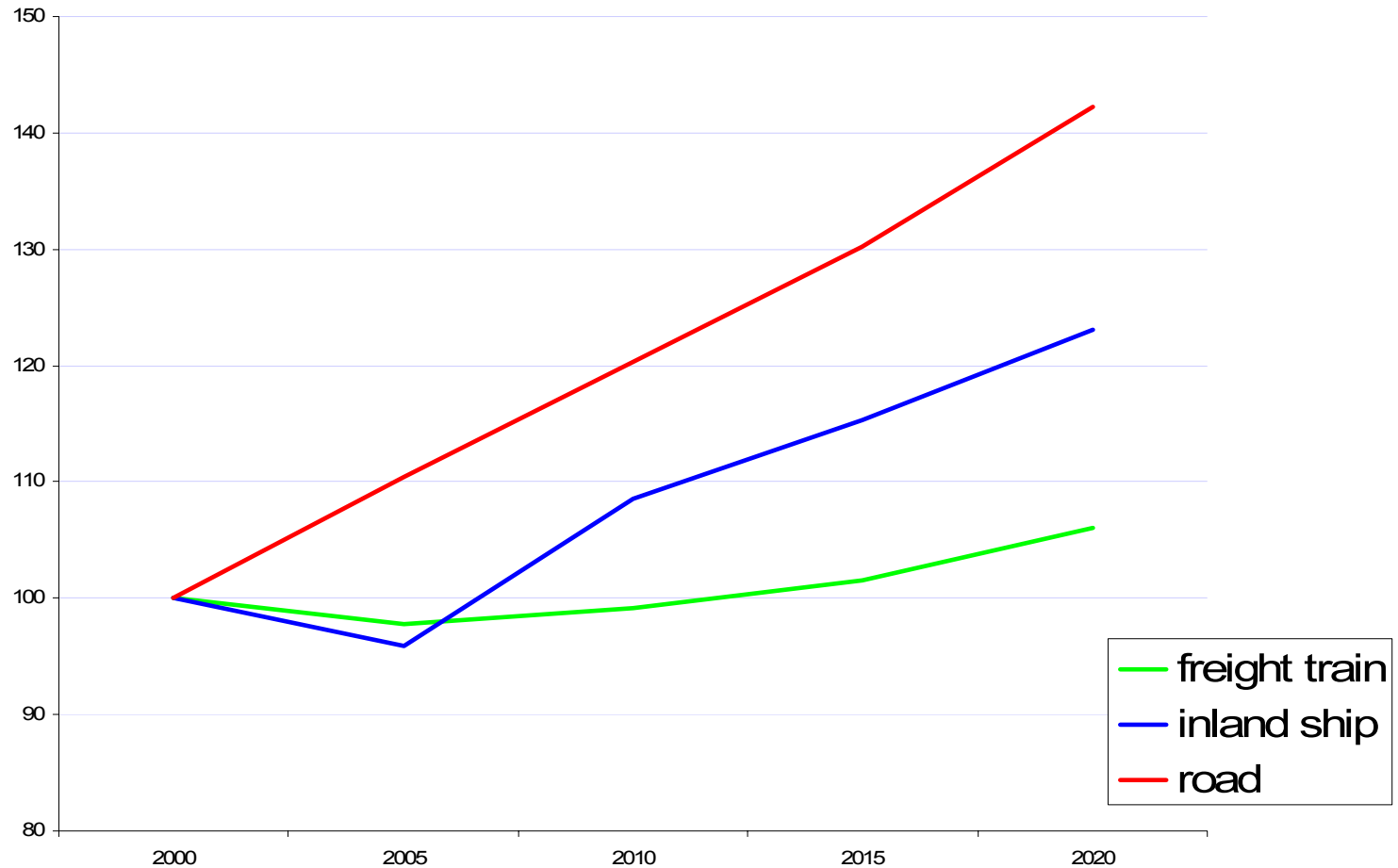
Baseline : passenger-km



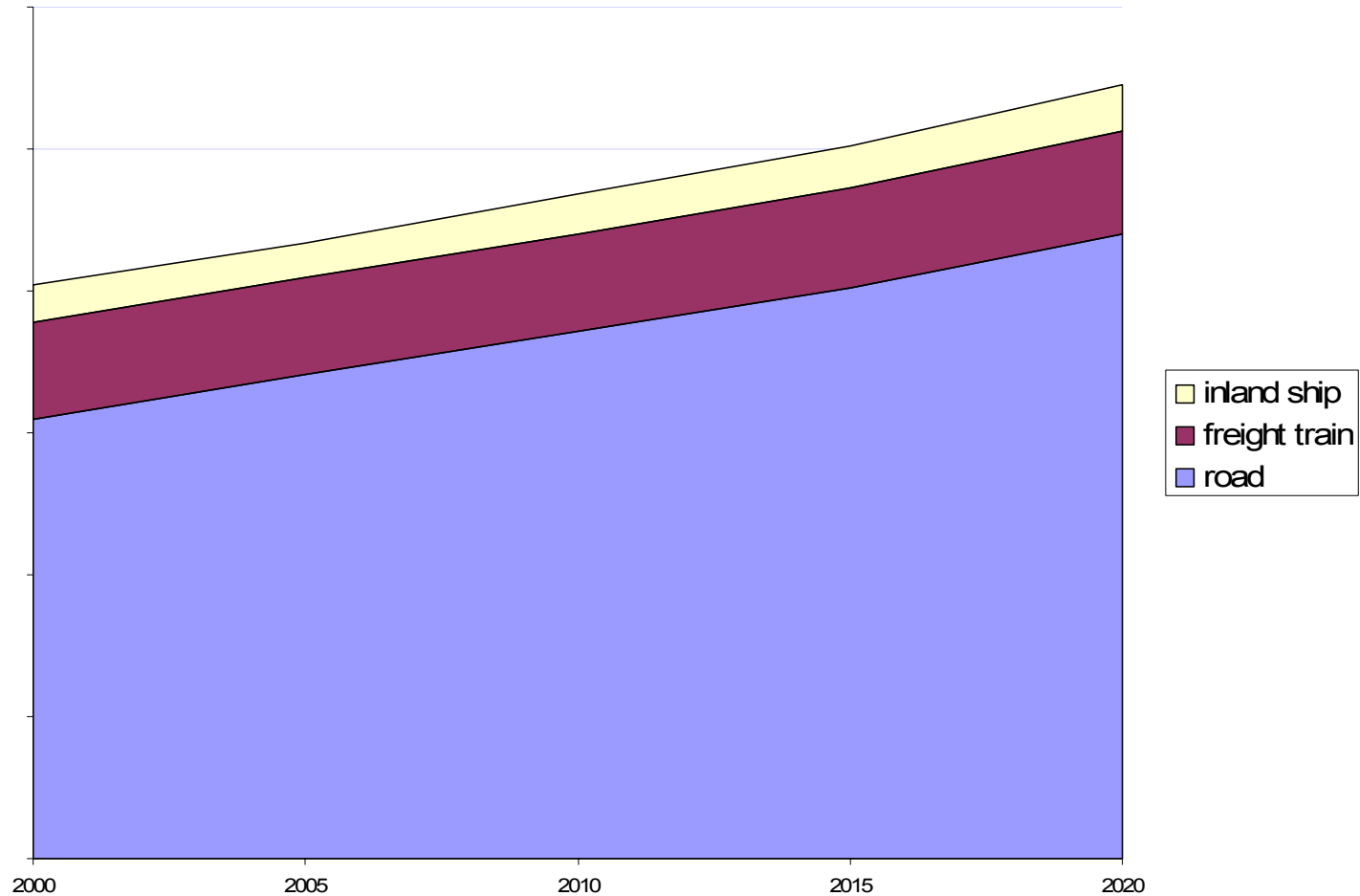
Baseline : modal split passenger-km



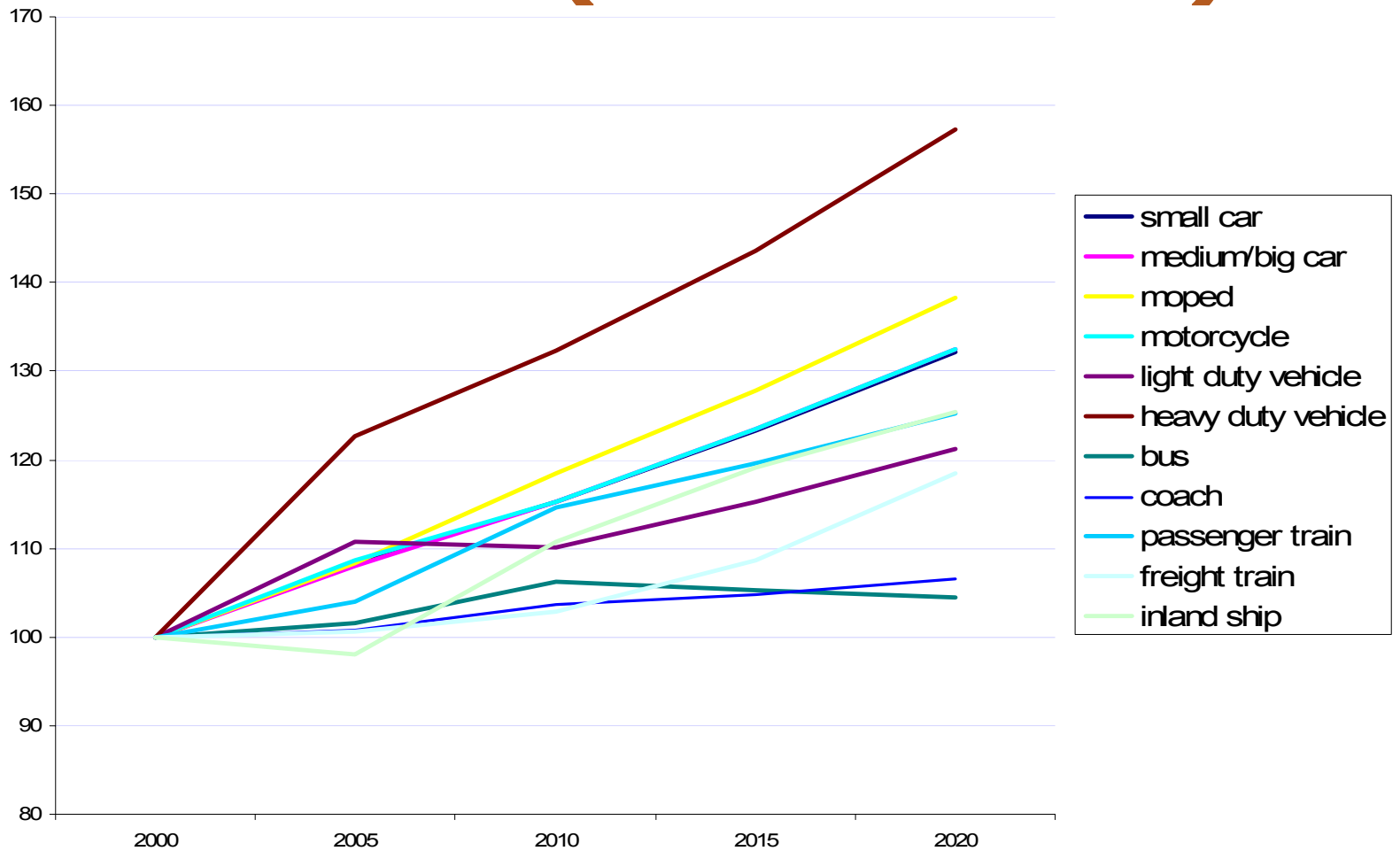
Baseline : ton-km



Baseline : modal split ton-tkm



Baseline: traffic volume evolution (vehicle-km)



Baseline : modal split vehicle-km

