THE ØRESUND BRIDGE
AND ITS REGION
2013

ØRESUNDSBRON®
www.oresundsbbron.com
The elegantly sweeping curves over Øresund’s gentle waves. The slender pylons that reach for the sky. The man-made island, Peberholm, home to not only the mouth of the tunnel, but also a unique flora and fauna. The Øresund Bridge is the most beautiful landmark imaginable for the Øresund Region.

But the Øresund Bridge is more than a unique and magnificent example of infrastructure and architecture.

It’s the rush in your stomach when you drive across the high bridge among the pylons and cables. It’s the feeling of endless possibilities when you see the light at the end of the tunnel and come up to Copenhagen and Copenhagen Airport. It is a new world that opens up when you arrive at the toll station in Sweden and two lanes become ten.

The many tons of concrete and metal are built on a vision in which Zealand and Scania grow together into an integrated region with Copenhagen and Malmö in the middle – not just in terms of traffic, but also intellectually, culturally, politically and economically.

The Øresund Region is home to nearly 4 million people and as many opportunities to build businesses and relationships. Many have already done so, and even more will do so in future.

For we who work on the Øresund Bridge, our ambition is to build bridges every day. We want to be the natural link between the peoples of Sweden and Denmark, east and west of Øresund.

In this booklet we paint a picture of the region’s current state – as it appears to our eyes and with our knowledge of traffic across Øresund. Enjoy the read.
TRAFFIC IN THE SHADOW OF THE CRISIS

The Øresund Bridge is the main link between Denmark and Sweden. Since opening, almost 70 million passenger cars, vans, lorries, coaches and other vehicles have crossed the bridge.

The Øresund Bridge experienced significant growth in traffic of between 10 and 17 per cent a year from the opening of the fixed link up to and including 2007. In 2007 traffic levels even exceeded the original forecasts.

Growth in traffic was primarily driven by significant differences in house prices on the Danish and Swedish sides of the sound. House prices in the metropolitan area had soared through the early years of the new millennium, which meant that many Danish families chose to move to Malmö and its environs, where house prices were somewhat lower. They were bridge commuters.

During the same period many Swedes looked for work in and around Copenhagen, where salary levels and the labour market were greater than in Sweden. These were also bridge commuters.

But something happened in 2008. Traffic grew by only 5 per cent on the Øresund Bridge, and in the tenth anniversary year, 2010, traffic fell for the first time in the link’s history.

The decline continued in 2011 and 2012, and an average of 18,500 vehicles crossed the Øresund Bridge in 2012 – 3 per cent less than in 2011.

Average daily traffic across the Øresund Bridge

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<td>0</td>
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Crossings |

Average daily traffic across the Øresund Bridge

Non-commercial traffic across the Øresund Bridge consists of commuters as well holiday and leisure vehicles. Commuter traffic is clearly the most highly represented – typically crossing several times a week – while holiday and leisure travellers only cross a few times a year in comparison.

In 2012, customers with a commuter agreement made 41 per cent of all trips across the bridge. Customers with a holiday and leisure BroPas agreement made 26 per cent of all trips across the bridge.

Commuters still account for the majority of bridge crossings but growth lies with holiday and leisure customers. Over the past five years, holiday and leisure traffic increased by 22 per cent, which includes 5 per cent from 2011 to 2012. During the same five-year period, commuting traffic increased by only 4 per cent and, in fact, it fell by 9 per cent from 2011 to 2012.

The reason for this is that the engine of growth in commuter traffic – differences in housing prices and the labour shortage in the metropolitan area – has stalled. In fact, a number of Danish immigrants have already relocated to Denmark. Furthermore, competition from trains has become more intense after the opening of Citytunneln (the City Tunnel) in late 2010.

A number of impediments to freedom of movement across the border between Denmark and Sweden are also contributing to the slowdown in integration and commuting. These were set out by the Øresund Committee in the booklet “33 border obstacles” in 2010.

In 2008, the Swedish krona suddenly weakened. The exchange rate was as low as DKK 68 to SEK 100. Danes took advantage of this for shopping trips across Øresund, where they also discovered the breadth of experiences available in Sweden. Since then however, the Swedish krona has strengthened significantly.

Since 2005, when the holiday and leisure BroPas was introduced, the Øresund Bridge has increasingly focused its marketing and communications on holiday and leisure customers – currently with the help of the revitalised benefit program, Club Øresundsbron (the Øresund Bridge Club).

Two factors explain the growth in holiday and leisure traffic:

- The purpose of the journey for passenger cars across the Øresund Bridge

<table>
<thead>
<tr>
<th>Year</th>
<th>Commuting</th>
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<tr>
<td>2006</td>
<td>29%</td>
<td>23%</td>
<td>43%</td>
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<tr>
<td>2009</td>
<td>24%</td>
<td>25%</td>
<td>42%</td>
</tr>
<tr>
<td>2012</td>
<td>33%</td>
<td>29%</td>
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FREIGHT TRAFFIC PULLS ITS WEIGHT

Commercial traffic across the Øresund Bridge consists of B2B traffic in passenger cars and vans as well as freight transport in lorries and vans. In addition, of course, there are coaches. Year on year, commercial traffic represents about 20 per cent of traffic across the Øresund Bridge.

Increasingly, freight traffic has discovered the Øresund Bridge as an effective and convenient link between Denmark and Sweden. 2012 was the first time that the Øresund Bridge road link carried more than half – 51.5 per cent to be precise – of all lorry trips across Øresund.

Freight traffic on the Øresund Bridge rose by 3 per cent in 2012 while, over a 10-year period, the freight traffic across the Øresund Bridge more than doubled from 495 lorries a day in 2002 to 1,008 lorries a day in 2012.

The development of commercial traffic is extremely dependent on economic trends in society; not just in Denmark and Sweden, but also throughout Europe. For example, much of the lorry traffic connects Sweden with markets on the continent.

Øresundskonsortiet itself also contributes to integration and trade between Danish and Swedish companies and contractors in the region. One example is that it is the organiser of five annual Øresund Business Meetings where business people from both sides of the sound meet to network and find the inspiration to look across to the other side of Øresund.
Each year, the Øresund Bridge outlines three scenarios for the future development of traffic over the bridge, with the medium scenario being considered as the most likely. It is expected that daily traffic will increase from the current 18,500 vehicles to 24,000 in 2020 and 29,000 in 2025.

Up until 2015 traffic is expected to increase to around 4 per cent per year. In 2021, the fixed link under the Fehmarnbelt opens, and the following year it is expected to contribute to traffic growth of 5.5 per cent on the Øresund Bridge. After that the traffic increase is expected to decline gradually to 2 per cent in 2025.

The forecast for traffic on the Øresund Bridge is based on a number of assumptions:

- Already decided infrastructure will be implemented, but new infrastructure of regional importance has yet to be decided.
- The competitive framework between the Øresund Bridge and the ferries between Helsingborg and Elsinore remains unchanged.
- The fixed link under the Fehmarnbelt opens in 2021 and contributes 1,000 additional daily passages across the Øresund Bridge from 2025.
- The Danish and the Swedish economies develop steadily and evenly over the next 10 years.
- Living and working conditions across the Øresund Region in the form of regulations, taxes and the like improve or remain unchanged.
The Øresund Bridge is not only a motorway between Denmark and Sweden, but it is also a railway. On the bridge it runs underneath the road. In the tunnel, it runs in a parallel tunnel tube.

Rail traffic across the Øresund Bridge consists partly of high-frequency passenger trains, first and foremost the Øresund trains, and partly of international freight trains, which connect Sweden with the continent.

Over the years from 2001 to 2009, the volume of freight grew steadily at an average of 5 per cent per year; and since 2001 the amount of freight crossing the bridge by train has almost doubled.

In 2010, freight traffic by rail across the Øresund Bridge increased sharply – 36 per cent more trains and 46 per cent more cargo than the previous year.

In 2012, approximately 6,600 freight trains crossed the Øresund Bridge. They carried 5.8 million tons of cargo. This was 9 per cent fewer freight trains and 6 per cent less cargo than in 2011.

Over the next 20-30 years rail traffic across the Øresund Bridge is expected to rise. This means that improved capacity on the adjacent sections will become necessary. An extension of the infrastructure leading to and from the Øresund Bridge is essential for increased integration in the region.
RECORD NUMBERS OF PASSENGERS

Rail passenger transport across the Øresund Bridge set a record in 2012: nearly 11 million people – equivalent to 30,000 a day – travelled by train across Øresund. This is an increase of 5 per cent, and over the past 10 years, passenger numbers across the sound actually doubled.

Citytunneln, between central Malmö and Hylle, opened in December 2010 and reduced the travel time between Malmö Central Station and Copenhagen Central Station to 35 minutes. In the morning and evening peak times, there are now six departures per hour between the two cities.

Two new stations were established with Citytunneln: Triangeln in the centre of Malmö and Hylle at Malmö Arena and the Emporia shopping centre. The new stations have given many travellers shorter distances and easier access to the trains, which has reduced travel time.

Thus the train has become a more attractive mode of transport and a genuine alternative to the car when the starting point and the destination of the journey is close to the Øresund rail line: Elsinore – Copenhagen – Øresund Bridge – Malmö – Lund and then on to Gothenburg, Karlskrona and Kalmar.

The train also operates as a primary means of transport within the region: 75 per cent of journeys in 2012 were regional, ie with both origin and destination in the Øresund Region. Half of all rail passengers on the Øresund Bridge made return trips between Scania and Copenhagen.

To a great extent, the train is used by “real Øresund citizens,” namely commuters with home and work on opposite sides of the sound. About 60 per cent of passengers across Øresund are commuters, of whom around 1,000 are students. Three in four train passengers live in Sweden while one in four live in Denmark.
Repayment of Debt

Denmark and Sweden signed an agreement in 1991 to build a fixed link across Øresund. Around a year later, the governments took the decision to create a joint Danish-Swedish company, Øresundsbro Konsortiet, which would build and operate the bridge and take out loans to finance the construction costs.

The 1991 agreement states that the construction and operation of the link should be financed by bridge tolls to be paid by travellers. In addition, Trafikverket (The Swedish Transport Administration) and Banedanmark (Rail Net Denmark) are to pay an annual fixed fee to use the railway.

The revenue is to cover operating and interest costs, as well as repayment of the loans that were taken out to finance the facility.

When the Øresund Bridge was completed in 2000, Øresundsbro Konsortiet had a net debt of DKK 19.6 billion. In addition, the two parent companies, A/S Øresund and SVEGAB AB, had a total debt of DKK 10.5 billion. By the end of 2012 Øresundsbro Konsortiet’s net debt amounted to DKK 17.4 billion.
The Øresund Bridge is not just a beautiful structure and a convenient way to drive between Sweden and Denmark. The fixed link has real economic value for Sweden and Denmark. When the Øresund Bridge opened, it became faster and cheaper to travel across Øresund. Travel time was shortened significantly. The journey from the mouth of the tunnel to the toll station takes just 15 minutes. It is cheaper to drive across the Øresund Bridge than it was to take the hydrofoil. In addition to the reduced travel time, it is of socio-economic value that Swedish commuters contribute to production in Denmark.

Access to housing and jobs on the other side of Øresund also contributes to economic benefits for the surrounding community. When house prices in Denmark peaked, Danes had access to affordable housing in Sweden while the Swedes have had access to the Danish labour market during a period of high unemployment in Skåne.

Various estimates have been made of these benefits in monetary terms, including in 2012 by the Øresund Committee and the Øresund Institute.
The CEO of Øresundsbro Konsortiet, Caroline Ullman-Hammer, has noted the decline in traffic, but is very much aware of the growing interest in driving across Øresund for leisure and holidays.

“It’s very satisfying that leisure and freight traffic on the Øresund Bridge is increasing, not least in the light of the general economic situation in the Øresund Region and the rest of Europe,” she says.

“Since 2011, we’ve chosen to focus on the holiday and leisure market. Following the introduction of our getaway discount and benefit programme, Club Øresundsbron, we’ve expended a lot of energy on telling the Swedes about experiences in Denmark and vice versa. Now we can see the effects of this.”

Traffic across the Øresund Bridge is falling overall, however, especially as a consequence of decreased commuting. Caroline Ullman-Hammer believes that Øresundsbro Konsortiet can do little about the trend because commuting is driven by the business cycle and by differences in the housing market and the labour markets of Zealand and Scania. “At Øresundsbro Konsortiet, we’re able mainly to offer an attractive price and an efficient link, and that’s exactly what we’re doing,” she emphasises.

Although commuter traffic is falling on the Øresund Bridge, it is rising on the Øresund trains. This does not bother Øresundsbro Konsortiet’s CEO.

“Trains are not our competitors, but are an integral part of the link across the Øresund Bridge and a good way to get to a workplace in central Copenhagen or Malmö, so I’m pleased to see increases in train traffic,” concludes Caroline Ullman-Hammer.
Even before the Øresund Bridge opened, about 1,500 people commuted between home and work in Malmö and Copenhagen. Most of them were Swedes who every morning jumped on the hydrofoil to get to work, mostly within the transport and health sectors. Many worked at Copenhagen Airport, others as nurses.

With the Øresund Bridge, it was suddenly realistic for more people to live on one side and work on the other side of the sound. During the years 2001 to 2008, the number of commuters grew by up to 40 per cent a year, and since the opening of the bridge, the number of commuters has risen tenfold to about 15,000. But with the financial crisis in 2008 stalling the rise, the number of commuters has actually fallen slightly over the last three years.

Copenhagen is the dominant city in the region with more than a million people – about one in three in the Øresund Region live in Copenhagen – and a diverse labour market. It naturally attracts workers from across the region, especially from Malmö.

Commuting between home and work is also rather one-directional, toward Denmark in the morning and toward Sweden in the evening. As many as 96 per cent of commuters across the Øresund Bridge live in Sweden and work in Denmark.

More than half – 60 per cent – of the commuters living in Sweden and working in Denmark live in Malmö. Helsingborg and Lund follow with 10 and 5 per cent respectively. Unsurprisingly, the work is primarily in the Danish capital. More than 80 per cent work in and around Copenhagen.

The picture is markedly different to before the Øresund Bridge opened, when only 38 per cent of commuters were living in Malmö, while all of 27 commuters lived in Helsingborg.

The Danish commuters working in Sweden live predominantly in and around Copenhagen. They work mainly in Malmö followed by Lund and Helsingborg.

In 2005, the Swedes made their appearance in the Danish labour market. There was a labour shortage in the capital, and the relatively high wage levels helped to make Danish jobs attractive.

The phenomenon peaked in 2007, when 6,667 Swedes got a job in Denmark. This was almost twice as many as in 2006 and nearly five times as many as in 2005. These healthy numbers were obvious in traffic figures on the Øresund Bridge, where commuter traffic set new records.

After the financial crisis set in, the number of commuters fell in 2008, 2009, 2010 and 2011. In 2012, there were 1,892 Swedes working in Denmark. This is less than one-third of the number in 2007, but a slight increase from 2011. The total number of Swedes who were employed in Denmark declined by 7 per cent from 2011 to 2012.
Integration in the Øresund Region has largely been driven by differences in house prices on the Danish and the Swedish side of Øresund.

In the early part of the century, house prices in Denmark exploded, especially in the metropolitan area. Many families with ordinary incomes could not actually afford to live near Copenhagen. On the Swedish side of Øresund, house prices were much lower, and Malmö became an attractive opportunity to live within reasonable commuting distance of the capital.

The difference in prices between homes in Copenhagen and Malmö peaked in early 2007. On the Danish side of Øresund, the average price was DKK 3.5 million for a 140 m² house. On the Swedish side it was DKK 2.2 million.

Malmö and Scania were no less interesting in that the exchange rate between DKK and SEK favoured the Danish krone. A salary in Copenhagen went further in Swedish stores.

Many Danes chose to pack up their goods and settle in Malmö, especially in the southern suburbs close to the Øresund Bridge, such as Limhamn and Bunkerslostrand.

In 2007 the picture changed, however. The global financial crisis erupted. The Danish housing bubble burst. House prices plummeted and the fall in prices did not seem to be over by the end of 2012.

In the Swedish part of the Øresund Region, especially in the creative and enterprising capital Malmö, house prices have risen dramatically.
Around the turn of 2012/2013, the price per square metre of single-family homes in Malmö and surroundings was almost in line with the Capital Region, and the price level in Scania was well above that in Zealand.

The consequence is that it is no longer economically advantageous to buy property in Scania rather than in Zealand. The house-moving flow from Denmark to Sweden has stopped, and many of the Danish emigrants have sold up to move back to Denmark.

All of this means that the housing market and the differences in prices across the region is not currently a driving force for integration between Zealand and Scania, between Copenhagen and Malmö, and for commuting across the Øresund Bridge.
HISTORICAL HIGHLIGHTS

March 1991
Denmark and Sweden sign an agreement to build a fixed link with a bridge and tunnel across Øresund.

August 1995
Work on the coast-to-coast link begins with dredging in Øresund.

June 2000
The Open Bridge event offers more than 100,000 people the chance to walk, run, roller skate and cycle across the Øresund Bridge.

July 2000
The Øresund Bridge is officially opened by Queen Margrethe of Denmark and Sweden’s King Carl Gustaf. There is a people’s party on both sides of Øresund.

September 2000
The millionth car crosses the Øresund Bridge. This is marked by presenting flowers to the driver at the toll station.

January 2005
The Øresund Bridge introduces the BroPas agreement to the region’s holiday and leisure travellers. Since then, nearly 300,000 customers have requested a BroPas.

May 2010
Car number 50,000,000 crosses the Øresund Bridge. Traffic across Øresund has surpassed the forecasts from the opening of the link.

July 2010
The Øresund Bridge celebrates its first 10 years with a public festival and a fantastic firework display on the bridge.
Øresundsbro Konsortiet is actively working with the Øresund Region towards integration between Zealand and Scania. You can read more about the efforts and results not only in the booklet you are holding now, but also in these publications that Øresundsbro Konsortiet either publishes or contributes to:

**Fokus Øresund (Focus Øresund)**

Fokus Øresund is a journalistic newsletter edited and published by Øresundsbro Konsortiet. Fokus Øresund relates topical stories about people and businesses that operate in the region. The newsletter focuses on the challenges and opportunities for integration across Øresund. The newsletter is digital and is published once a month. See more at: www.oresundsbron.com/fokusoresund_dk

**Tendens Øresund (Øresund Trends)**

Øresund Trends gathers statistics and analyses to paint a current picture of the Øresund Region. The publication is edited and published by the Øresund Committee in cooperation with a number of organisations with an interest in the Øresund Region, including Øresundsbro Konsortiet. Øresund Trends is published once a year. See more at: www.orestat.se

**Social responsibility and sustainable development**

Øresundsbro Konsortiet takes responsibility for society and the environment in and around the Øresund Bridge. In our CSR report, we describe how we work with the working and natural environments, including work on the manmade island, Peberholm, which has become a biological experiment in scale 1:1. The report is published once a year. See more at: www.oresundsbron.com/samfundsansvar2012

**Annual report**

In Øresundsbro Konsortiet’s annual report you can read about our financial results, the company and traffic trends over the past year. See more at: www.oresundsbron.com
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Danish text: Jesper Skjønnemand, jspr.nu
Swedish text: Sanna Holmqvist, Øresundsbro Konsortiet
English text: Katie Schwarck

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