

# Transport infrastructure in Poland further southward and eastward

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# Structure of the presentation

- About PROTRANS
- Introduction to Polish economy
- Railway freight market in Poland
- Port of Gdynia with its hinterland
- Future projects
- Summary

# About PROTRANS

- Small consultancy company from Poland established in 2010;
- Expertise in railway /intermodal market and sustainable mobility solutions;
- Worked for TETRPLAN (DK), VECTURA (SE), DB Fernverkehr (DE), few Polish authorities and companies;
- Linking business and scientific view on transport matters.



## Modernising the Polish railway market

In order to make the Polish rail sector more competitive, the technical condition of the rail infrastructure is currently being improved and the transport undertakings reorganised.

**The principal rail infrastructure**  
PKP PLK S.A. (PKP) belongs to the Polish state. The company manages the network, which handles 90% of passenger transport and 95% of freight transport in the country. The Polish rail network is 20,700 kilometres long. In 2011, passenger transport carried 10.5 billion passengers, 85% of the total train passenger transport in the EU. One of the distinctive features of the Polish rail market is the presence of...

This chapter is based on an assessment of the Polish transport market by Marco Wank, Ph.D., University of Cologne.

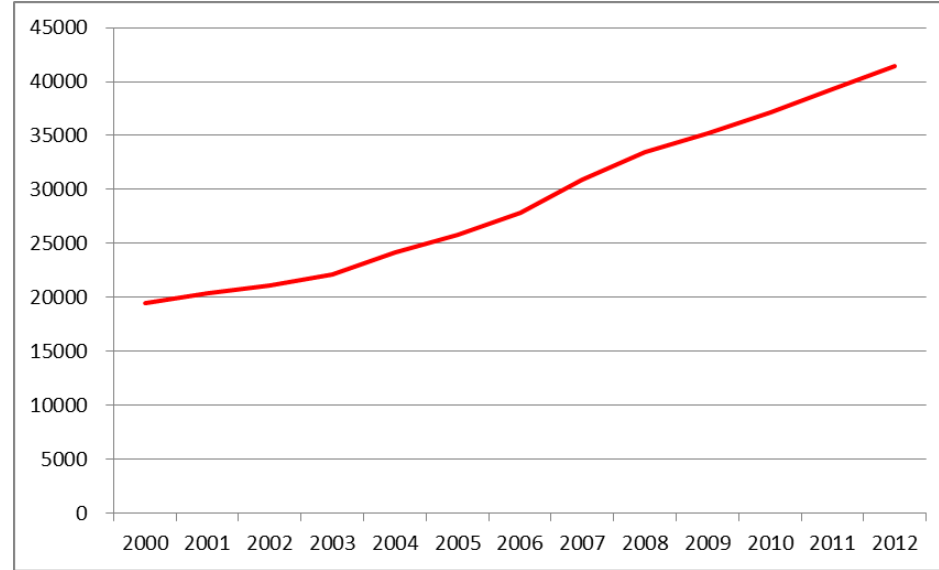
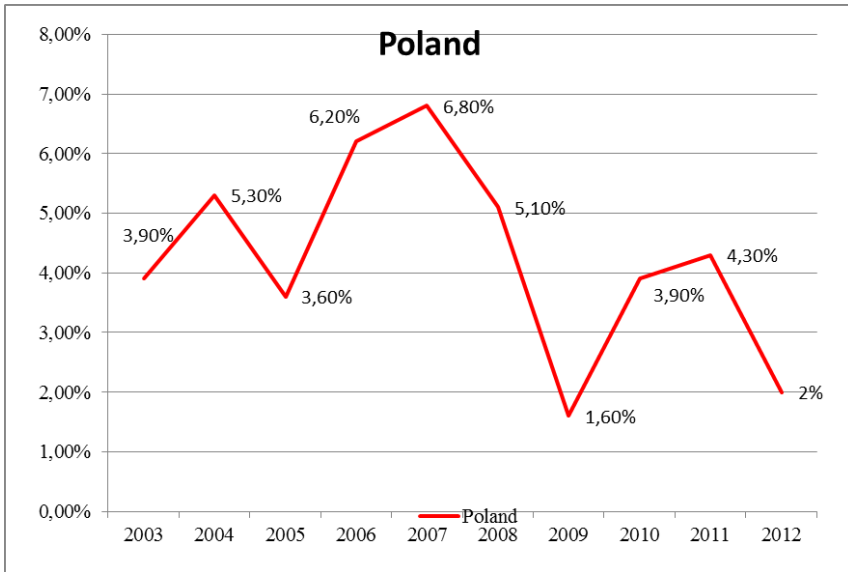


**Competition Report**  
2012

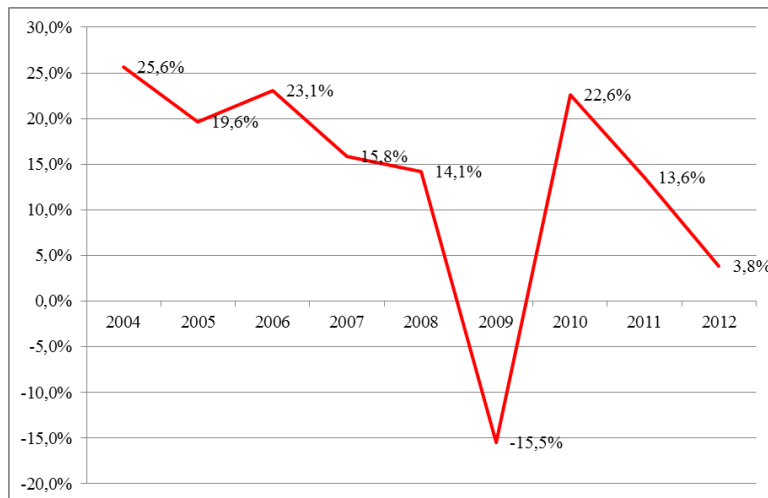
Available at:

[http://www.deutschebahn.com/file/2598024/data/competition\\_report\\_2012.pdf](http://www.deutschebahn.com/file/2598024/data/competition_report_2012.pdf)

# Introduction to Polish economy

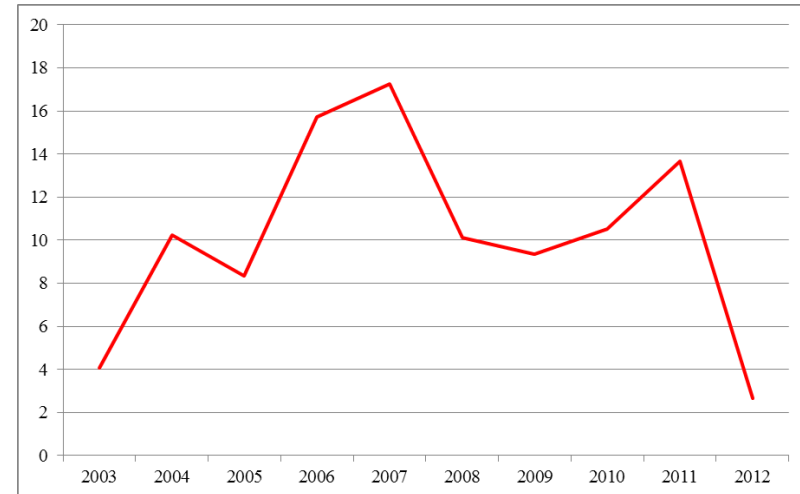


Annual rate of GDP growth 2001- 2012



Dynamics of Polish export

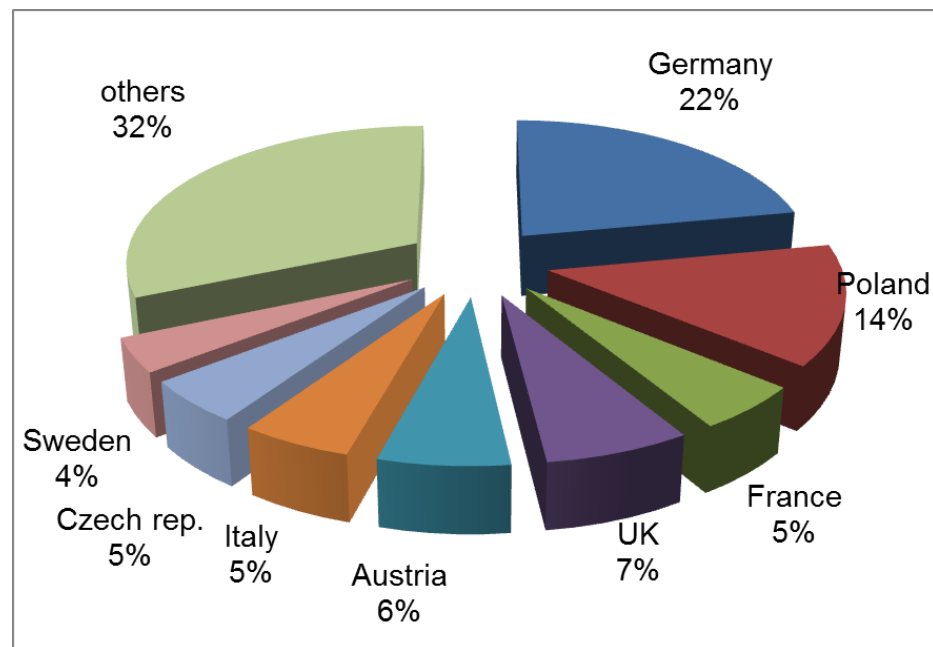
GDP per capita in Poland between 2000- 2012 [ZLP]



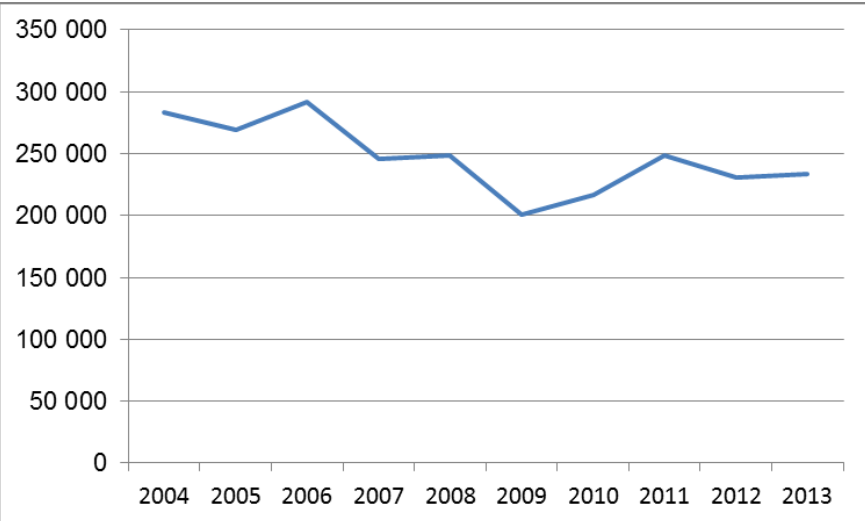
FDI in Poland between 2000- 2012 [bill. EUR]

# Freight railway market in Poland: strong within EU markets

- Polish freight railway market is second in EU next to German with ca. 14% of tonnes by rail;
- Stable volume since 2004, hit by crisis of 2009 and stable recovery;
- 233 mio. tonnes in 2013;
- 50 870 mio. ton-kms;
- Ratio tonn-kms/train-kms in 2013: 685.

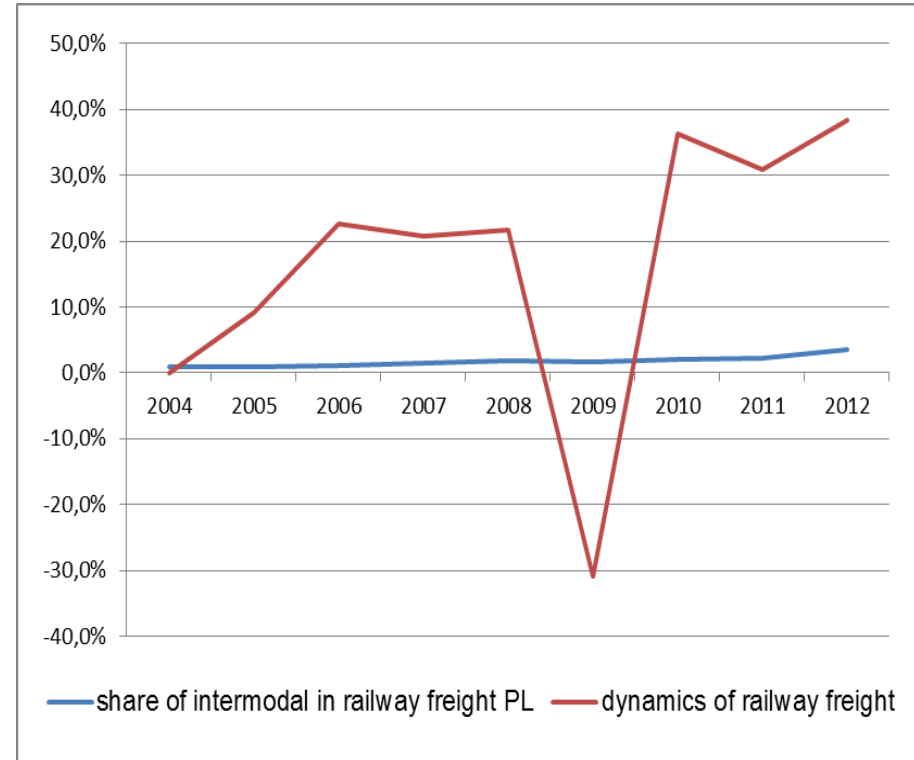


*Source: own calculation based on EUROSTAT data for 2012*



# Freight railway market in Poland: with dynamic intermodal segment

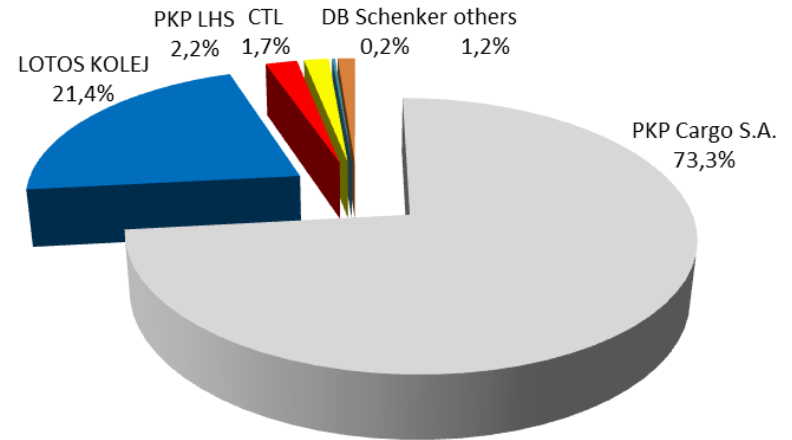
- Dynamic growth of intermodal freight between 2004 and 2013;
- The volume tripled between 2005 and 2012;
- Still relatively low share in freight volume 3,5% in 2012 and 6,2% in ton-kms;
- Few active operators and stakeholders on intermodal market;
- 8,6 mio. tonnes in 2013



# Freight railway market in Poland: with dynamic intermodal segment

## Challenges:

- Network of terminals should be improved;
- Potential capacity problems in few major nodes (mix of passenger and freight operations);
- Much more priority to fast freight needed;
- Model of financing of railway infrastructure manager;

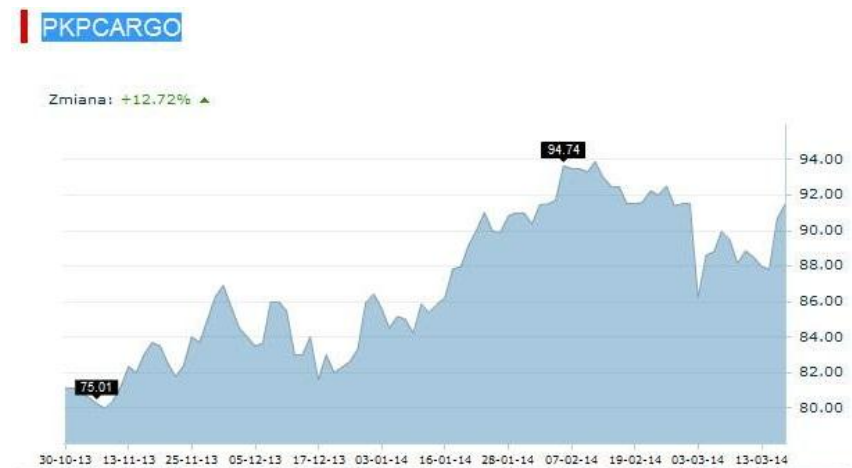
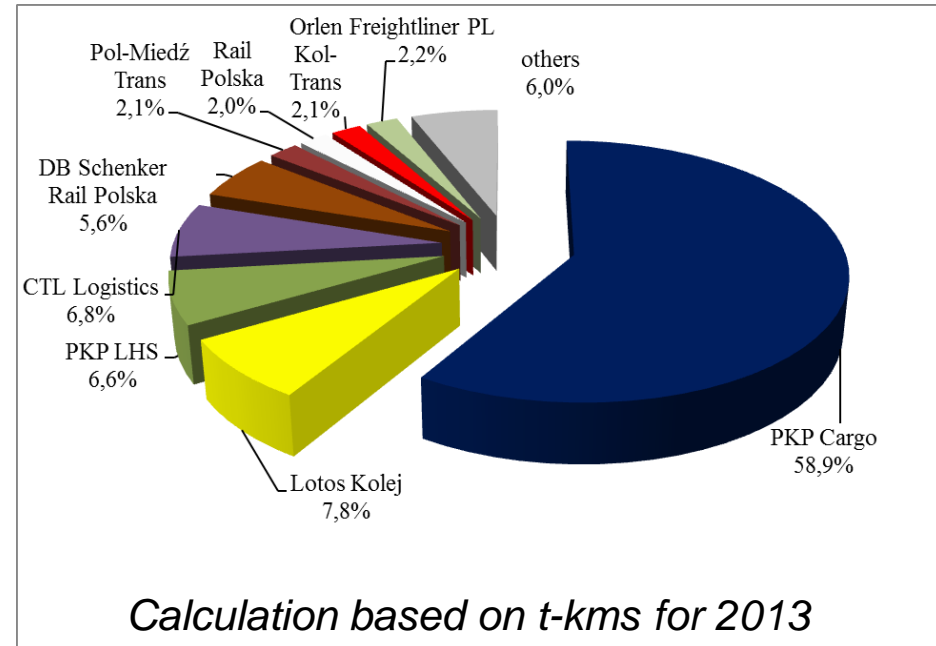


## Strengths:

- Dense railway network;
- Majority of investments to be finished by 2015;
- PKP Cargo after restructurisation, few other active intermodal operators;
- Improved access to ports of Gdynia and Gdansk;

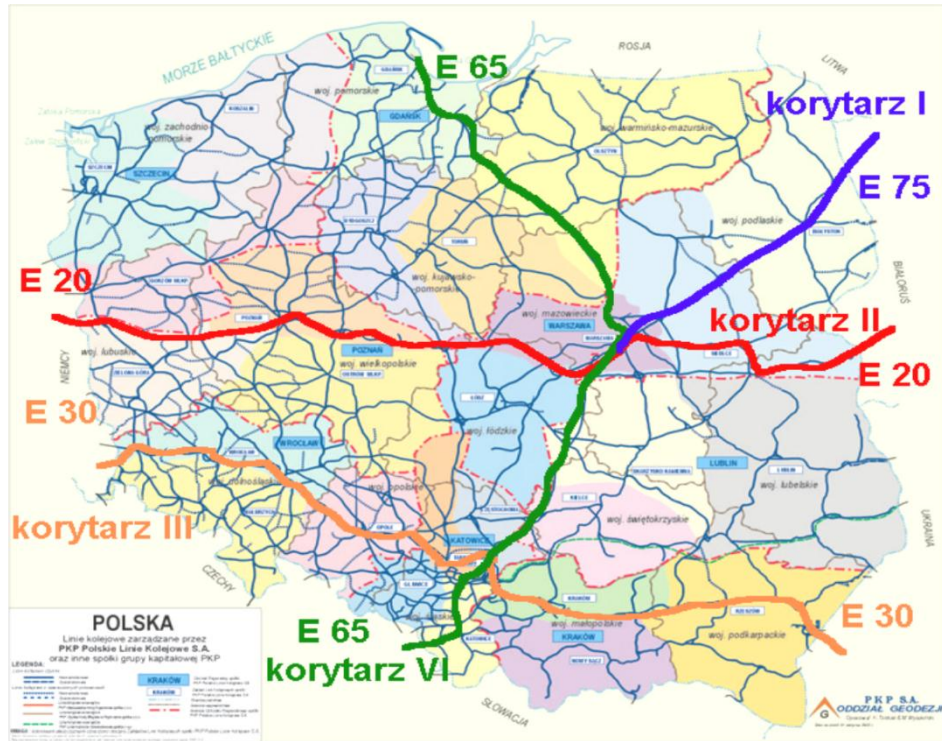
# Freight railway market in Poland: main features

- Strong market position based on strengthened economy;
- Limited prospects of growth in 2011-2014 due to vast construction works on main rail corridors;
- Dominated by bulk freight;
- Dynamic but still small share of intermodal freight;
- Few competitive freight operators;
- Transformation of biggest railway operator PKP Cargo into logistics operator with new organisational structure;
- Prospects for growth: January 2014 / January 2013: +3,5% in ton-kms.





# Railway infrastructure

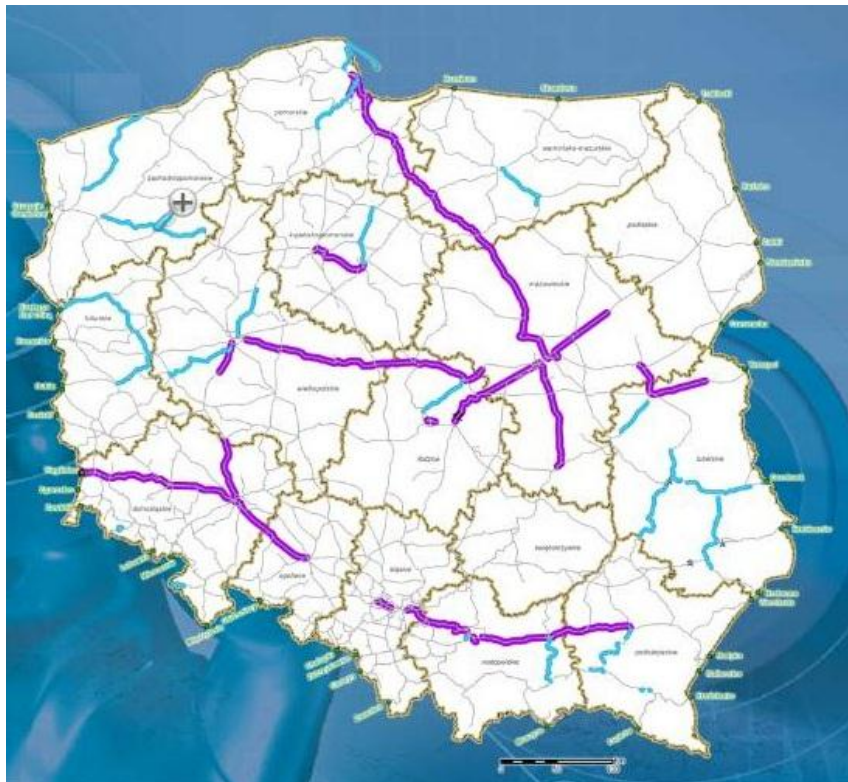


Source: PKP S.A. and PKP PLK S.A.

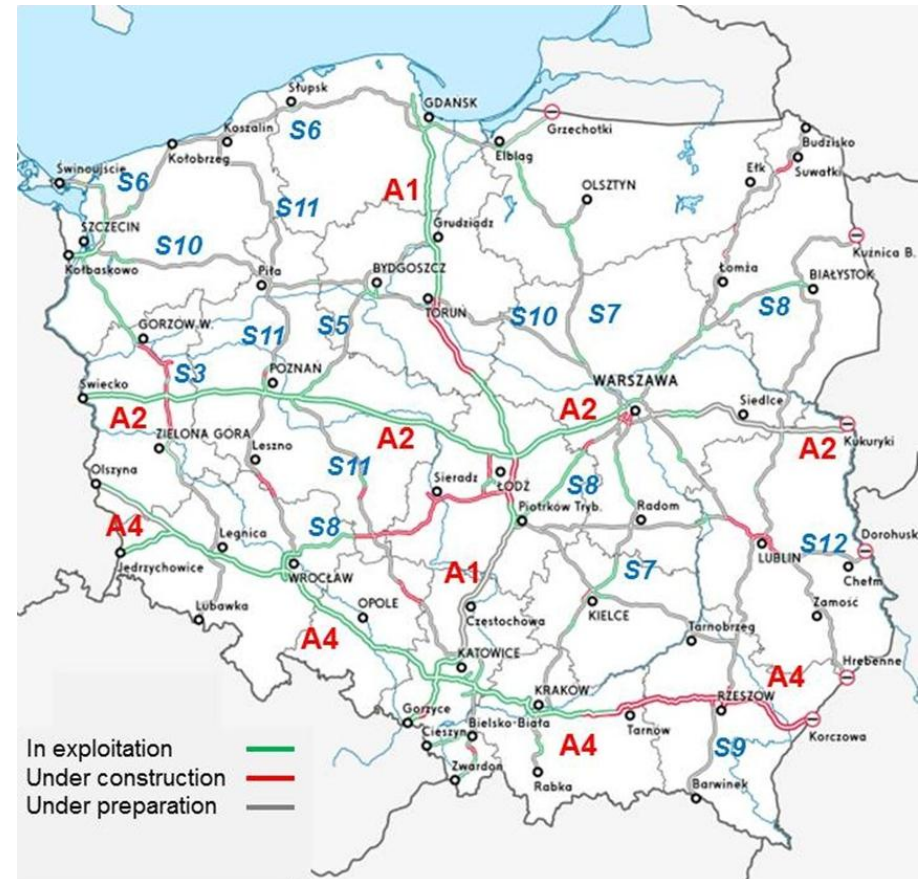
- Ca. 20 thous. kms;
- 540 kms of railway with 1524 mm (Silesia to Ukrainian border operated by PKP LHS);
- Steady improvement of railway infrastructure in main TEN-T corridors + some regional / national lines;
- Different categories of investments, including substantial improvement of technical parameters as well as revitalisation of existing infrastructure.

# Road and rail: under big reconstruction

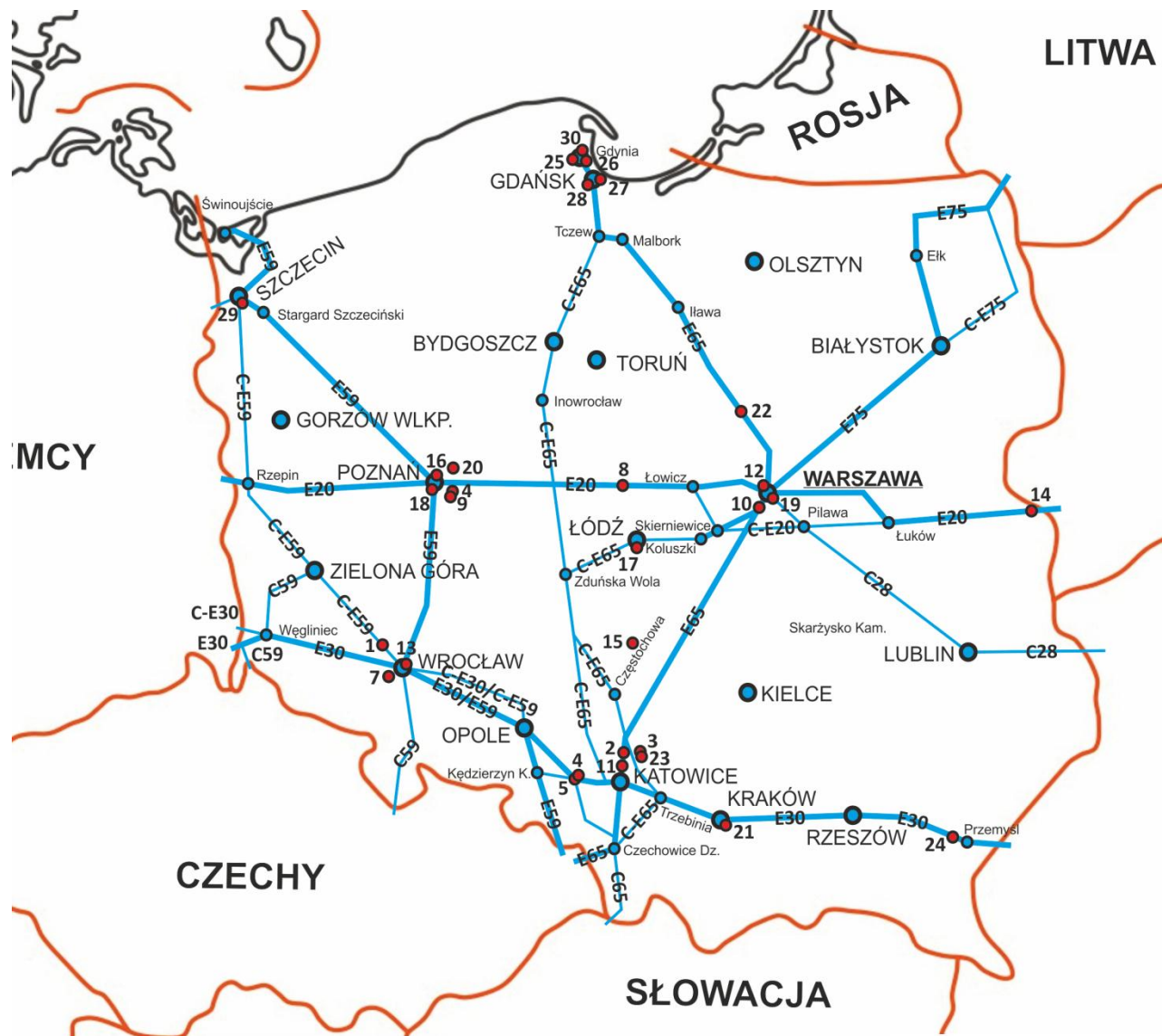
## Rail infrastructure



## Road infrastructure

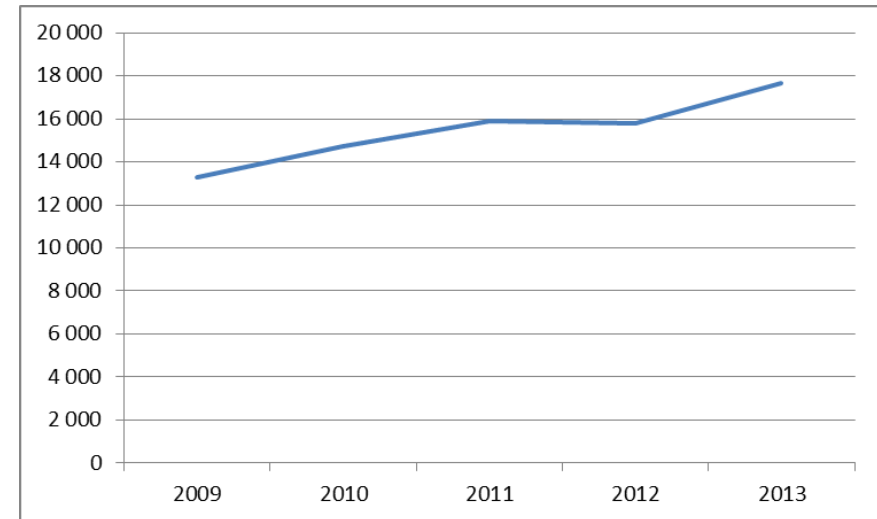


# Clusters of intermodal terminals in Poland



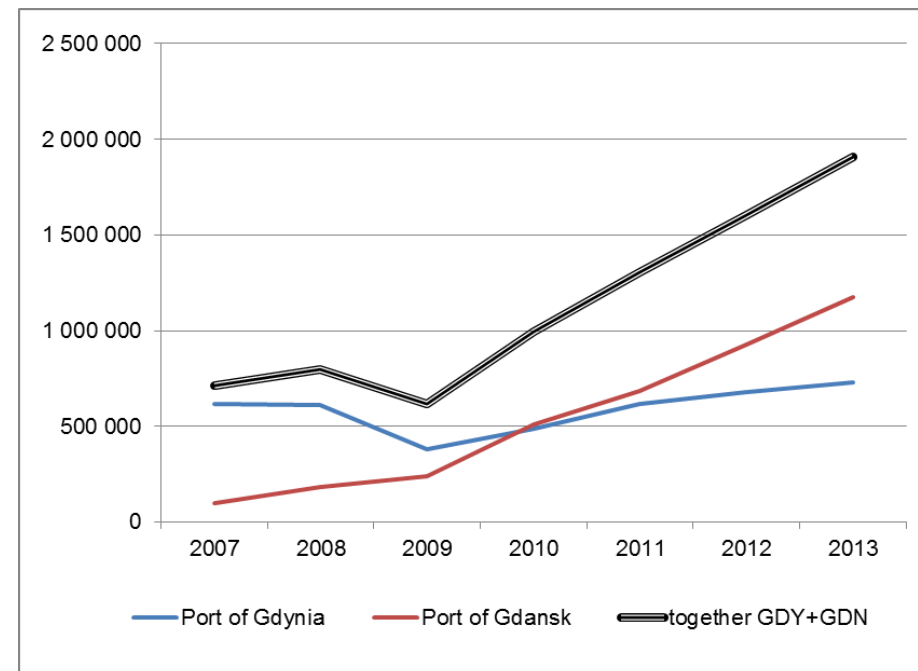
# Container (r)evolution

- Dynamic growth of volume in intermodal;
- Growth is accompanied by investments of:
  1. Gdynia's Port Authority (turntable basin, deepening the channel, finalising ro-ro project),
  2. terminal operators (investments in terminals, new location for ferry terminal), and
  3. railway infrastructure manager PKP PLK S.A. (modernisation of freight railway station Gdynia Port – ca. 150 mio. EUR, feasibility study just started).



*Port of Gdynia volumes 2009-2013*

*TEU in Ports of Gdansk and Gdynia between 2007 and 2013*



# Summary

- Strengthening of hinterland infrastructure creates a very good opportunity for Port of Gdynia;
- There is a strong partnership in investments strengthening port's potential between Port of Gdynia Authority, terminal operators and railway infrastructure manager;
- Intermodal segment of railway freight market is strongly influenced by volumes of ports of Gdansk and Gdynia;
- Potential on N-S axis still awaits for full consumption: after 2014 an improvement of travel time and capacity is expected;