

THE RAIL MARKET IN POLAND 2014



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PKP PLK

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As the principal owner and operator of Poland's national rail network, PKP PLK in 2013 was responsible for 19,191.22 route-km, the third longest system in the EU, and for 37,076 km of track. Of the 42,334 sets of points, 23,869 are situated within station areas. 25,116.7 km of track (not route) are electrified, mostly at 3 kV DC. 7,885.3 km of route are double-track, the remainder single-track. There are 15,915 level crossings, 2,673 of them designated 'Grade A' in importance. There are 25,738 civil engineering structures, and 18,069 buildings. PKP PLK and PKP SA are currently making efforts to sell or otherwise dispose of unwanted and derelict real estate.

Investment has been low in modern signalling, ATP and IT systems to streamline operations and make them more efficient. Around 50% of the network's signalling equipment is over 50 years old, as are 60% of the telecommunication installations. Catenary and power supply systems are somewhat more modern. By the early 1990s just over 50% of the entire 1,435 mm gauge network was under the wires. A 10-year plan for 1991-2000, drafted in the last days of the ancien regime, envisaged electrification of a further 72 routes, around half of which have since closed, including two of the four which were in fact electrified.

During the final decade of the 20th century and the first of the 21st a substantial reduction in rail network length and hence density took place. In 1991 there were 23,193 km of 1,435 mm gauge route (plus numerous industrial complexes of both standard and narrower gauges). Density fell from 84 km per 1,000 km² in 1990 to 74 km per 1,000 km² in 1998, and to 65 km per 1,000 km² in 2006.

At the beginning of the present decade 5,448 km of Poland's railways formed part of the European international network, as specified by the AGTC agreement defining arterial rail routes dating from 1 February 1991. Under EU law, Poland is obliged to keep these routes in good order and to progressively modernise them. Finance for maintenance and upgrading is in short supply. An annual average of 1,390 km of track renewal is necessary to maintain the network's status quo in terms of maximum permitted line speeds and operating safety. This has not been met since the early 1990s, and despite continuing investment using EU and national budget funding, infrastructure quality overall is improving only slowly, as the tables below indicate.

Quality of the infrastructure of the PKP PLK network between 2010 and 2012

Year	Good	Average	Below average
2010	36.3%	34.5%	29.2%
2011	40.0%	32.0%	28.0%
2012	43.0%	30.0%	27.0%

Line speed improvements between 2007 and 2012 (PKP PLK network), % of network length

Speed	2007	2012
120 km/h+	8.30%	9.19%
80 to 120 km/h	33.86%	36.87%
60 to 80 Km/h	21.41%	18.55%
Below 60 km/h	36.42%	35.39%

Line axle-weight improvements between 2007 and 2012 (PKP PLK network), % of length

Axle-weight	2007	2012
221 kN+	39.24%	43.19%
210 to 221 kN	14.24%	10.02%
200 to 210 kN	17.50%	18.19%
Below 200 kN	29.02%	28.61%

Operational activity and train path allocation on the PKP PLK network between 2003 and 2012

Year	% length of available train paths sold	% number of available train paths sold	Passenger services (million gross train-km)	Freight services (million gross tonne-km)
2003	n/a	n/a	42,726	101,914
2004	n/a	n/a	36,684	105,970
2005	66.73	64.91	33,040	101,839
2006	59.81	64.07	33,221	107,213
2007	88.98	86.34	33,217	110,101
2008	84.46	85.41	33,520	105,395
2009	77.63	79.37	32,777	88,354
2010	84.09	81.38	32,232	99,383
2011	79.43	78.56	29,653	108,534
2012	80.29	78.82	29,928	96,654

Distribution of freight across the PKP PLK network

Tonnage carried	2007	2012
Over 25 million tonnes	6.30%	6.70%
Between 10 and 25 million tonnes	30.09%	30.75%
Between 3 and 10 million tonnes	32.46%	27.85%
Under 3 million tonnes	31.15%	34.63%

It should be noted that a relatively small part of the network carries the heaviest volumes of freight and many lines carry relatively little. This prompted PKP PLK in late 2012 to consider mothballing a considerable part of the network. It was announced that in December 2013 around 2,000 km were to be temporarily taken out of use. One factor affecting this decision was that close on 2,200 km of rail routes had not seen any traffic for years. In all 90 stretches of line were involved. PKP PLK analysed 458 lines totalling 7,264 km and applied three closure scenarios, 'light', 'average' and 'radical'. The 2012-13 analysis involved data collected over the previous seven years – revenue generated, passenger and freight traffic, the density of local population, local per capita GDP, car ownership levels, local road network density, alternative public transport options and journey times, and the number of large industries in the vicinity of the lines in question. It identified almost 4,000 km of unprofitable stretches of railway, in all 300 sections of line. However, with growing opposition, especially by open access freight operators, who claimed that the secondary network provided alternative routing options, it was first decided to opt for a 'light' policy, and then the scheme was quietly dropped.