

# Research for TRAN Committee - Transport and Tourism in Poland

This overview of the transport and tourism sectors in Poland was prepared to provide information for the mission of the Committee on Transport and Tourism to the country in September 2018.

## 1. INTRODUCTION

Poland covers an area of 312 679 km<sup>2</sup> and has 38.4 million inhabitants. The country's eastern border is an external border of the European Union. It borders on the Russian Federation in the north-east, Lithuania, Belarus, and Ukraine in the east, Slovakia and the Czech Republic in the south, and Germany in the west. The urbanisation rate of Poland is 60.1 %<sup>1</sup>. In 2017, the gross domestic product (GDP) of Poland (at current prices) amounted to PLN 1 982 billion (EUR 465.6 billion<sup>2</sup>), corresponding to an increase of 4.6 % on the previous year. Poland is now a frontrunner among EU countries as regards the rate of economic development. Between 1990 and 2015, the GDP per capita of Poland increased more than sevenfold (x 7.3) – from USD 1 731 (at then current prices) to USD 12 500.

In 2017, the Polish economy ranked eighth in the EU and 24th in the world<sup>3</sup>. The rate of recorded unemployment amounted to 5.9 % in June 2018, the most favourable figure since 1990<sup>4</sup>. In 2017, Polish exports of goods amounted to EUR 206.6 billion, the figure for imports being EUR 206 billion. The main markets to which Polish goods are exported include Germany, the Czech Republic, the UK, France and Italy. For imports, Poland's main partners include Germany, China, Russia, Italy and France.

Poland is divided into 16 administrative provinces (voivodeships), which are demographically and economically diverse. The outright leader is **Mazowieckie Province**, which includes the capital, Warsaw. Other metropolises located in regions with a strong and diversified economy include Kraków, Łódź, Wrocław, Poznań and the Gdańsk-Gdynia-Sopot tri-city. Moreover, the more advanced provinces are characterised by more diversified economic structure, greater availability of public transport, more substantial resources and more significant human capital, leading to a higher level of investment attractiveness. The provinces with lower economic potential are located on the country's periphery. The province which accounts for the largest share (over one fifth) of national GDP is Mazowieckie.



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<sup>1</sup> Polish General Statistical Office (GUS) - [www.stat.gov.pl](http://www.stat.gov.pl), accessed: 13.07.2018.

<sup>2</sup> Eurostat - [GDP and main components](http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&code=sdg_8_10), accessed: 13.07.2018.

<sup>3</sup> International Monetary Fund - [www.imf.org](http://www.imf.org), accessed: 13.07.2018.

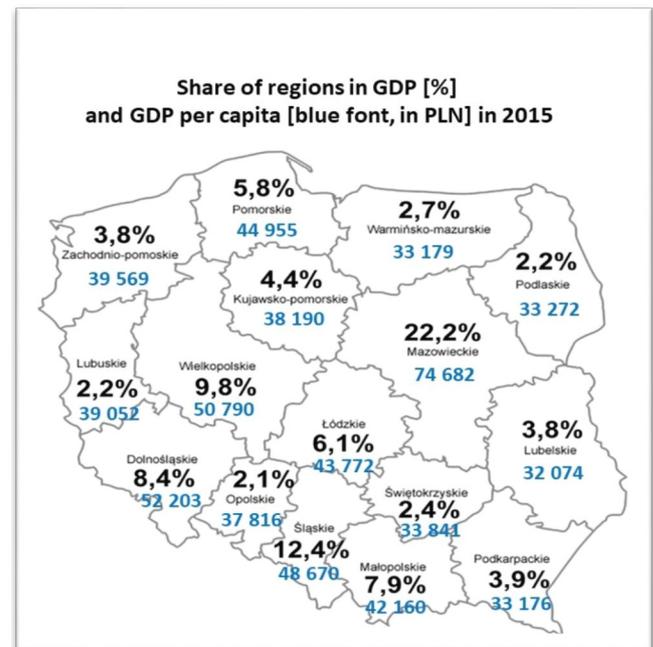
<sup>4</sup> Polish General Statistical Office (GUS) - [www.stat.gov.pl](http://www.stat.gov.pl), accessed: 13.07.2018.



**Podkarpackie Province** covers an area of 17 846 km<sup>2</sup>. To the east, the province is bordered by Ukraine, to the south by Slovakia. At both of these frontiers there are border crossings for rail and road transport (local or transit). Podkarpackie Province is populated by 2.13 million people and is thus the ninth most populous province. Only 41.2 % of its inhabitants are city dwellers, which makes it one of the least urbanised parts of Poland. For years, however, Podkarpackie has ranked highest of the country's provinces for life expectancy.

The capital of Podkarpackie Province is Rzeszów, with nearly 200 000 inhabitants. The province includes 51 cities, four of them with over 50 000 inhabitants (Rzeszów, Przemyśl, Stalowa Wola and Mielec). The province's GDP per capita stands at 48 % of the EU-28 average<sup>5</sup>. In the fourth quarter of 2017 unemployment stood at 7.3 %<sup>6</sup>.

The transport network of Podkarpackie Province includes the A4 motorway, two expressways (S19 and S74), 13 railway lines and one international airport, Rzeszów-Jasionka (part of TEN-T).

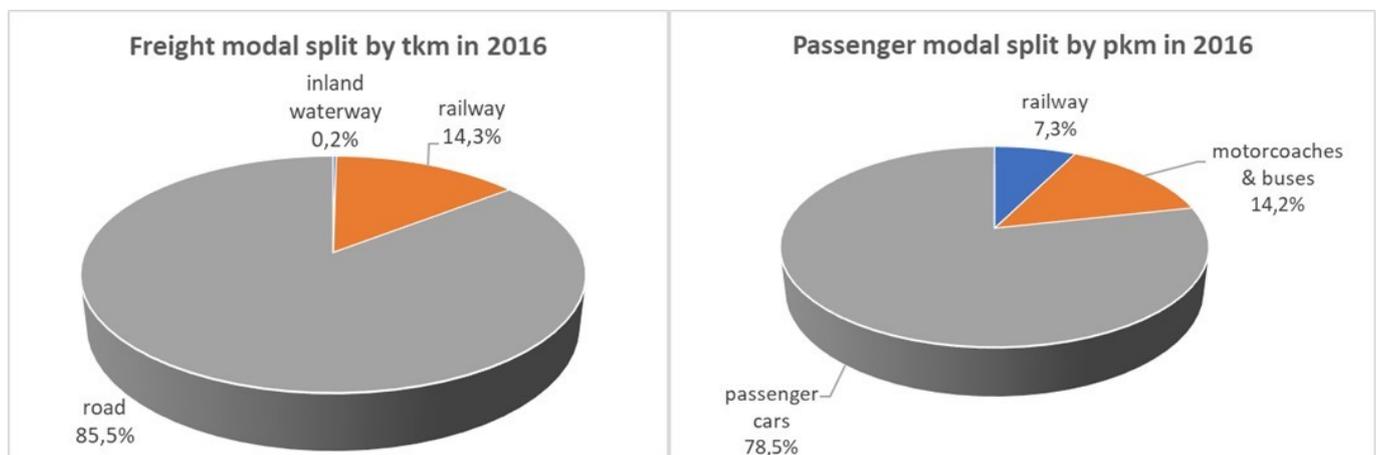


**Source:** Author's own analysis based on data of the Polish General Statistical Office

## 2. GENERAL INFORMATION ON TRANSPORT

In Poland, road transport plays a dominant role for both passengers and freight. This share is higher in passenger transport where cars, buses and coaches had a cumulative 92.7% market share in 2016. In case of freight, rail achieved over 14% of market share in the same year, while the share of inland waterways was marginal.

**Figure 1: Transport freight and passenger modal split, 2016**



**Source:** Author's own elaboration based on Eurostat data<sup>7</sup>

In Poland, **final energy consumption** of transport has risen by 38% (from 12.5 Mtoe in 2005 to 17.2 Mtoe in 2015)<sup>8</sup>. The country's share of energy from renewable sources in gross final consumption of energy reached 11.8% in 2015 (16.7% for EU-28) but the share of renewable energy sources in Polish transport is comparable to the EU-28 average (6.4% for Poland and 6.7% for EU-28 in 2015)<sup>9</sup>.

<sup>5</sup> Eurostat - [Regional GDP per capita in the EU in 2013](#), May 2015.

<sup>6</sup> Statistical Office in Rzeszów - Report on the socio-economic situation of Podkarpackie Voivodeship in 2017, 2018, p. 9.

<sup>7</sup> Eurostat - [Goods transport by land by country](#).

<sup>8</sup> Eurostat Statistical Books - [Energy, transport and environment indicators](#), 2017, p. 56.

<sup>9</sup> Eurostat Statistical Books - [Energy, transport and environment indicators](#), 2017, pp. 68-72.

## 2.1. Main documents on transport policy

Adopted in 2013, the '**Transport Development Strategy until 2020 (with perspective until 2030)**' (TDS) is the main planning document defining objectives and outlining directions for the development of Polish transport in the medium-term perspective. Its paramount goal is to enhance the country's territorial accessibility and improve the safety of transport users and the effectiveness of transport sectors through the creation of a coherent, sustainable and user-friendly system at the national, European and global dimensions. The strategy identifies five specific objectives comprising: (i) the development of a modern, coherent transport infrastructure network; (ii) the improvement of organisational methods and management of transport systems; (iii) the improvement of safety for traffic participants and goods carried; (iv) reduction of the adverse impact of transport on the environment; and (v) the development of a rational model for financing infrastructural investments.

Detailed priorities for the development of transport in Poland (including a list of projects) have been specified in the '**Implementing Document for the TDS**', which constitutes a comprehensive investment plan for the transport projects to be realised within the 2014-2023 perspective and beyond, with support from EU budget resources<sup>10</sup>. Among the key interventions, the document identifies the following priorities:

- shortening of travel time between regions, by rail by 33 % and by road by 15 % on average;
- modernisation of the core passenger and freight Trans-European Transport Network (TEN-T);
- improvement of road transport safety;
- development of multimodal functions of seaports and improvement of their accessibility from both land and sea;
- increase of length of inland waterways with a minimum third-class navigability.

On the basis of the TDS sectoral plans and programmes relevant for individual modes of transport are drawn up. Some of them are awaiting an update along with the TDS itself, of which a new draft is at an advanced stage of preparation.

Moreover, in 2015 Poland approved the '**National Urban Policy 2023**', which defines the activities comprising urban transport policy (prioritisation of investments within the development of transport systems and shaping travel behaviour), organisation and management of transport (public transport and policy towards passenger cars, and management and coordination of public transport), as well as spatial planning.

## 2.2. Financing transport infrastructure

Within the period 2014-2020, Poland's allocation from the European Structural and Investment Funds (ESI Funds) amounts to EUR 86 billion (or EU 2 262 per person). These funds are being distributed to various sectors of the country's economy through 24 national programmes<sup>11</sup>. The biggest programme is the '**Operational Programme Infrastructure and Environment 2014-2020**', with a budget of EUR 32.7 billion. Two thirds of its budget is allocated to the priority 'Network Infrastructures in Transport and Energy'. By the end of 2017, 18 % of resources had been spent and 65 % of allocations decided for the programme as a whole<sup>12</sup>.

The use of the **ESI Funds** has a strong positive impact on the level of public investment in Poland, which is higher than the EU average. In addition to public investment on a national level, a particularly large share of investment (2.3 % of GDP between 2009 and 2016, compared to the EU-28 average of 1.3 % of GDP) was realised at local and regional level.<sup>13</sup> In 2016, general government expenditure on transport in Poland reached 2.8 % of GDP,<sup>14</sup> a figure higher than the EU-28 average (1.9 %).

<sup>10</sup> Ministry of Infrastructure of Poland - Strategic Documents - [Transport Development Strategy up to 2020 \(with perspective up to 2030\)](#) (available in Polish).

<sup>11</sup> European Commission - [European Structural and Investment Funds](#).

<sup>12</sup> European Commission - [European Structural And Investment Funds](#).

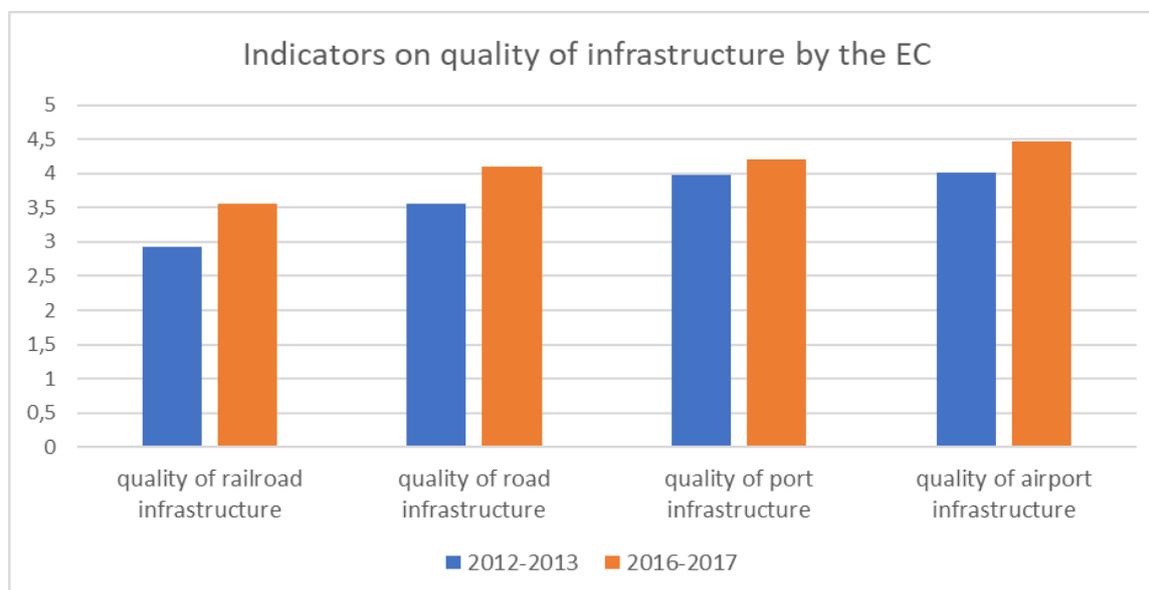
<sup>13</sup> European Commission - staff working document SWD(2018)0219 - Country Report - [Poland](#) 2018.

<sup>14</sup> Eurostat - [Government expenditure on transport](#).

## 2.3. Transport infrastructure quality

The quality of transport infrastructure in Poland has improved and its ratings have been getting closer to the EU average across all modes of transport over the last two reporting periods. The most significant growth was noted in the area of quality of road and airport infrastructure (please see Figure 2 below).

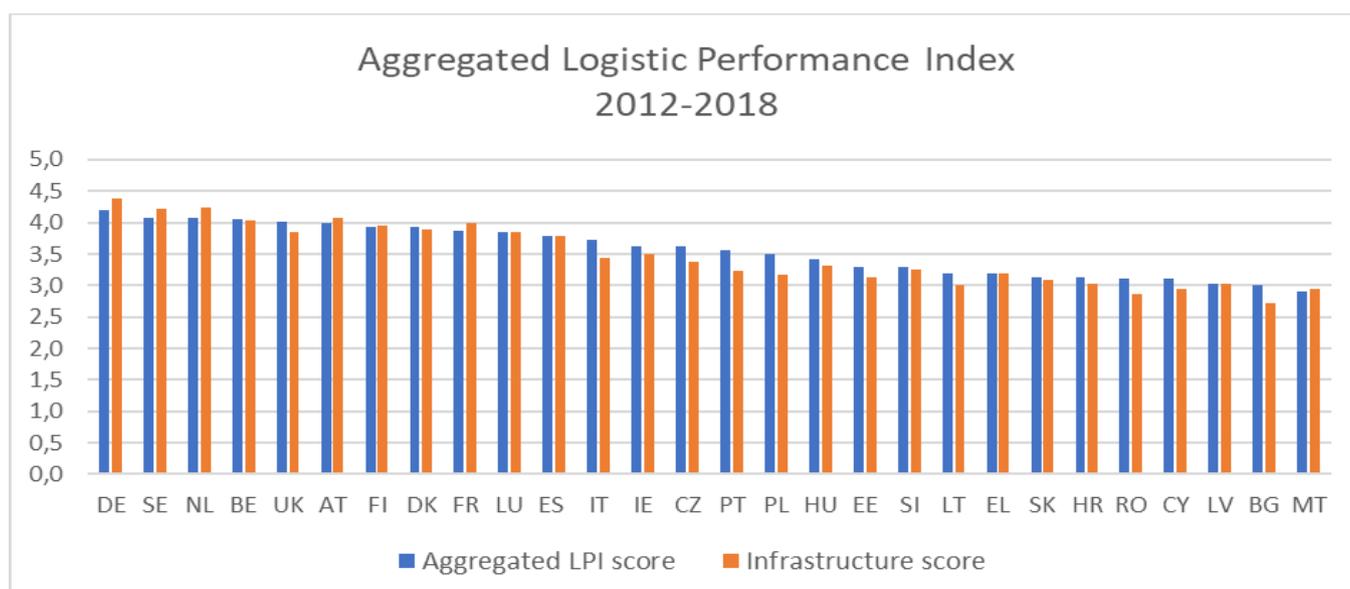
**Figure 2: Indicators of quality of infrastructure in Poland**



**Source:** Author's own analysis based on data of the EC<sup>15</sup>

Also, the Logistic Performance Index (LPI) of the World Bank shows an improvement in indicators for transport infrastructure quality in Poland. The aggregated LPI score for Poland for the period 2012-2018 was 3.5, placing the country in the middle of the ranking of EU Member States (please see Figure 3 below). However, the quality of transport infrastructure in Poland was still lower than the country's overall score (3.17)<sup>16</sup>, showing that there is room for further improvement.

**Figure 3: Aggregated Logistics Performance Index 2012-2018**



**Source:** Author's own elaboration based on World Bank data<sup>17</sup>

<sup>15</sup> European Commission - DG MOVE (Mobility and Transport) - Poland Country Scoreboard - [Investments and Infrastructure](#).

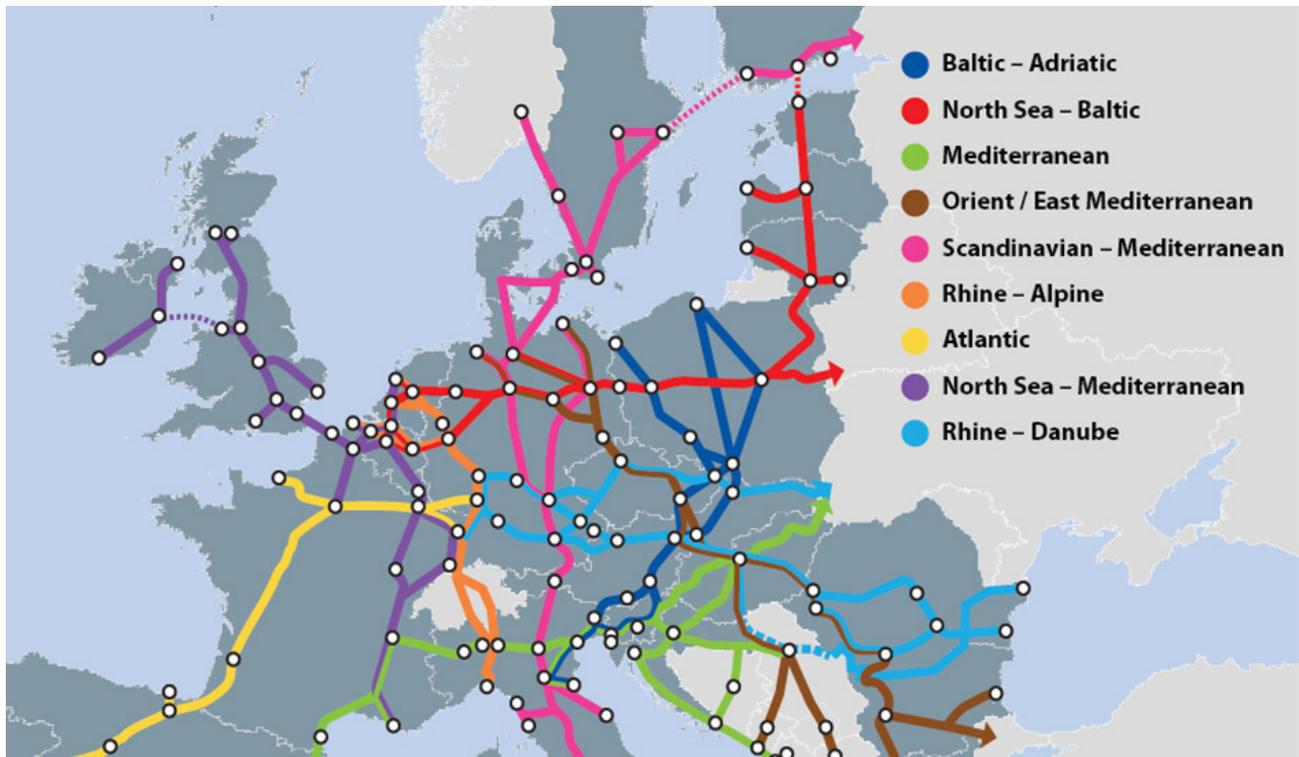
<sup>16</sup> World Bank - [Logistics Performance Index 2018](#). The Aggregated LPI combines the four most recent LPI editions. The scores of the six components across the 2012, 2014, 2016 and 2018 LPI surveys were used to generate a 'big picture' to better indicate countries' logistic performance. This approach reduces random variation from one LPI survey to another and enables the comparison of 167 countries.

<sup>17</sup> World Bank - [LPI Global Ranking 2018](#).

## 2.4. Trans-European Transport Network (TEN-T)

Poland's TEN-T performance currently stands at 62 % completion for the road core network and at 23 % for rail. Between 2007 and 2013, global expenditure on TEN-T in Poland amounted to EUR 12.17 billion<sup>18</sup>. There are two TEN-T corridors running through Poland, namely the Baltic-Adriatic Corridor and the North Sea-Baltic Corridor (please see Map 1 below).

**Map 1: The TEN-T Core Network Corridors - focus on Poland**



Source: European Commission<sup>19</sup>

The **Baltic-Adriatic Corridor (BAC)** runs from the Baltic seaports of Gdańsk, Gdynia, Szczecin and Świnoujście in the north, to the Adriatic ports of Koper, Trieste, Venice and Ravenna in the south of the EU, taking in the industrial regions of central and southern Poland. BAC still faces important bottlenecks on six rail and two road cross-border sections in terms of compliance with the TEN-T requirements<sup>20</sup>. In Poland important investment undertakings include improvement of seaport connectivity by rail (prepared by PKP PLK S.A., the national railway infrastructure manager; estimated value for the three seaports is EUR 2 billion) and by road.

The **North Sea-Baltic Corridor (NSB)** covers two components within Poland, namely the section Lithuanian/Polish border – Warsaw and the section Polish/Belarus border – Warsaw – Poznań – Polish/German border. The corridor's most significant project is Rail Baltica, which is the European standard gauge railway line connecting Estonia, Latvia and Lithuania to Poland and the rest of the EU. 80 % of the Rail Baltica line in Poland (section Lithuanian/Polish border - Warsaw) is intended to be completed by 2023<sup>21</sup>.

**Via Carpatia** is a newly developed project and is planned as an international transit road linking Lithuania, Poland, Slovakia, Hungary, Romania, Bulgaria and Greece. In Poland, it is scheduled to run through the less developed eastern regions, contributing to their social and economic progress. Moreover, the importance of this road route for international traffic has been recently recognised by the EC, as Via Carpatia has been included in the new proposal for the Connecting Europe Facility II (to be operational after 2020). The backbone of Via Carpatia in Poland consists of the existing and modernised sections of the S61 and S19 roads, including in Podkarpackie Province (in particular, the section Rzeszów – Lublin and Rzeszów – Barwinek, border with Slovakia – see Map 2 below).

<sup>18</sup> European Commission - DG MOVE (Mobility and Transport) - EU Country Scoreboard - [Poland](#).

<sup>19</sup> European Commission - DG MOVE (Mobility and Transport) - Trans-European Transport Networks - [TENtec - Maps](#).

<sup>20</sup> European Commission - DG MOVE (Mobility and Transport) - [Baltic-Adriatic Corridor](#).

<sup>21</sup> Catherine Trautmann, North-Sea Baltic TEN-T Corridor Coordinator - [Information Note](#) - Brussels, 26 June 2017.

**Map 2: Indicative routing of Via Carpatia in line with the Łańcut Declaration II**

Source: Polish Ministry of Infrastructure<sup>22</sup>

### 3. ROAD TRANSPORT

Poland's **road infrastructure** is being continually developed and upgraded. The density of public roads in Poland is 95.8 km per 100 km<sup>2</sup>, lower than the EU average. In August 2018, there were 1 830 km of express roads in Poland, while the length of completed sections of three motorways amounted to 1 637 km. The technical condition of the national road network has improved. As of 2017, 58 % of national roads were considered to be of good technical status, compared to 45 % in 2004<sup>23</sup>.

In 2017, the most rapid growth was recorded in the **carriage of goods by road**. The increase totalled 14.8 % compared to the previous year and 27.6 % compared to 2015. Road freight transport performance stood at 348 559 million tonne-kms, almost 15 % higher than in 2016<sup>24</sup>. Poland's road transport market (in terms of transport performance volume) is the second largest in the EU after Germany. In 2016, the carriage of goods in national transport increased by 1.0 % in tonnes and 1.9 % in tonne-kms by comparison with 2015. Over the same period, international transport increased by 18.7 % in tonnes and 18.0 % in tonne-kms<sup>25</sup>.

<sup>22</sup> Polish Ministry of Infrastructure - [Map of Via Carpatia as per Łańcut Declaration II](#).

<sup>23</sup> Polish Directorate-General for National Roads and Motorways (GDDKiA) - [Raport o stanie technicznym nawierzchni sieci dróg krajowych na koniec 2004 roku](#), Warszawa 2005, p. 7.

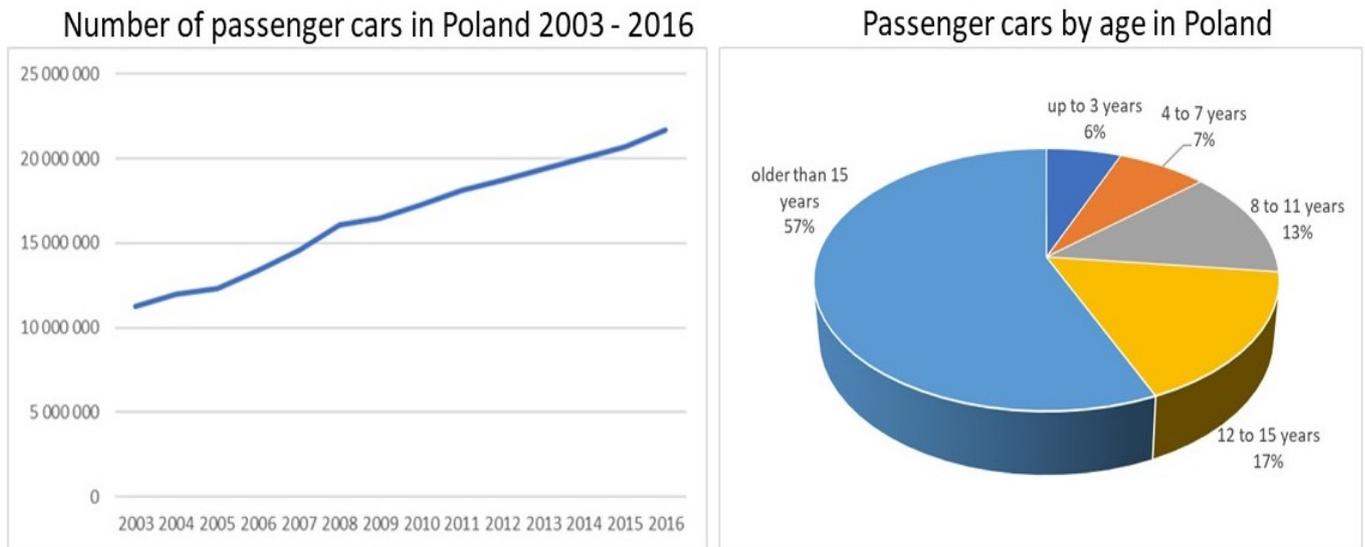
<sup>24</sup> Polish General Statistical Office (GUS) - Carriage of goods and passengers in 2017, May 2018.

<sup>25</sup> Polish General Statistical Office (GUS) - [Transport. Operational Results in 2016](#), 2017, p. 68.

At the end of 2016, the **number of lorries** (including vans) amounted almost to 3.2 million, but most were small capacity vehicles. Most of the **road transport companies** in Poland are small or medium-sized enterprises. Of among roughly 4 100 enterprises<sup>26</sup>, nearly 50 % owned between 10 and 19 lorries and road tractors, while one fourth of them owned between 20 and 49 such vehicles, and only 7 % more than 50<sup>27</sup>.

In 2016, the number of **passengers** carried by road public transport dropped from 390 million to 379 million. The main reason behind this change is the dynamic growth of individual transport. Between 2003 and 2016, the number of passenger cars increased by 93 % in Poland, contributing to greater mobility but also causing congestion, pollution and an increase in road accidents, particularly in urban areas. Old vehicles constitute the majority of passenger cars in Poland, with over half being more than 15 years old (please see Figure 4 below).

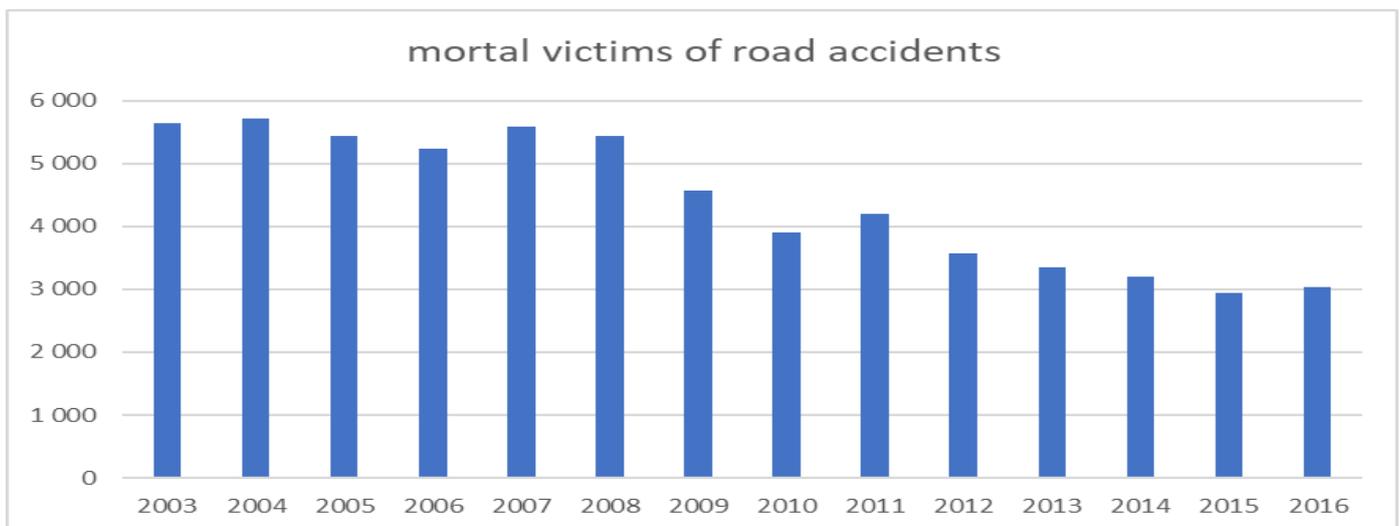
**Figure 4: Passenger car fleet in Poland**



Source: Author’s own analysis based on data of the Polish General Statistical Office<sup>28</sup>

Transport (maintenance and development of road infrastructure and public transport) is one of the most important areas of budgetary spending for local and regional government in Poland. **Road safety** is an important issue in Poland. The number of accidents has fallen significantly over the last years, but varies between regions. The number of fatalities decreased by 46 % between 2003 and 2016 (see Figure 5 below).

**Figure 5: Fatalities in road accidents in Poland (2003-2016)**



Source: Author’s own analysis based on data of the Polish Statistical Office<sup>29</sup>

<sup>26</sup> Only enterprises with 9 or more employees.

<sup>27</sup> Polish General Statistical Office (GUS) - [Transport. Operational Results in 2016](#), 2017, p. 210.

<sup>28</sup> Polish General Statistical Office (GUS) - [Bank of Local Data](#), 19.08.2018.

<sup>29</sup> Bank of Local Data. Polish General Statistical Office (GUS), [2018](#).

## 4. RAIL TRANSPORT

In 2017 Poland had some 19 100 km of **railway lines**, of which 62 % were electrified. In the same year, rail network coverage totalled 6.1 km/100 km<sup>2</sup>. Between 2007 and 2015, the quality of rail transport infrastructure in Poland increased substantially. The proportion of lines in good technical condition rose from 25 % to 55 %, while the share of lines in an unsatisfactory technical condition fell from 28 % to 16 %. The large-scale modernisation and revitalisation projects implemented with support from EU funds have increased the attractiveness of rail in Poland, in particular for passenger transport. In 2016, 12 % of the railway lines managed by the national operator, PKP PLK S.A., were enabled for a speed of at least 160 km/h<sup>30</sup> (by contrast with 4.4 % in 2004). The quality of railway infrastructure in Poland scored 3.56 for the years 2016- 2017 (in comparison with 5.76 for the highest-ranked country, France) increasing from 2.93 for 2013-2014<sup>31</sup>.

In 2017, 304 million **passengers** were carried by rail (an increase of 3.8 % on 2016), which constituted the best result in 15 years. In 2017, operational work performed by rail carriers also increased to 162.3 million train-km, and performance by rail to 20 321 million passenger-km (the best result since 2002)<sup>32</sup>. This situation resulted from a substantial improvement in the transport facilities on offer (modernisation of linear infrastructure, modernisation and purchase of new rolling stock, and upgrading of stations), with a significant part of the activities being cofinanced by the EU.

The number of the most important freight operators on the Polish rail market has increased from 11 to 15 since 2008. Until recently, the only operator providing long-distance passenger services was PKP Intercity. In 2018, the Czech operator Leo Express started operations on the route Kraków - Katowice - Prague. Transport under public service obligation in the regions is managed by regional authorities in the provinces. Some of them have established their own rail operators to fulfil these obligations. Yet, insufficient integration of public road and rail transport has been a significant challenge for the development of passenger transport in all Polish regions.

Some recovery has also been observed in the **carriage of goods** in Poland. In 2017, rail moved 239.9 million units of goods covering 54 829 million tonne-km of transport performance<sup>33</sup>. The Polish rail freight transport market is the second largest in the EU after Germany. The structure of the Polish rail transport market is dominated by bulk cargo, which in 2017 represented 71 % of total freight in train/km terms within the PKP PLK network. At the same time, the share of intermodal trains has grown rapidly, achieving 14 % in operational activities<sup>34</sup>.

The largest **logistics operator** on the Polish rail market is PKP Cargo S.A. (with a 44 % market share), followed by DB Cargo Polska (18 %), Lotos Kolej (6 %) and PKP LHS (4 %). The last-named operator is a specialised company providing transport services on its own infrastructure, which is composed of nearly 400 km of broad-gauge line offering a direct connection between the industrial Silesia region in Poland and the Ukrainian rail network, via a border crossing in Hrubieszów. The low average commercial **speed of trains** (25.1 km/h for freight trains and 29.9 km/h for intermodal trains) constitutes a significant constraint for the competitive position of rail in Poland. The objective included in the already mentioned 'Strategy for Responsible Development until 2020 (with perspective until 2030)' involves achieving an average speed for freight trains within the PKP PLK network of 40 km/h by 2020.

In compliance with the Partnership Agreement concluded between the Government of the Republic of Poland and the European Commission, the funds allocated to the railway sector amount to around EUR 10.2 billion in the present EU financial perspective<sup>35</sup>.

<sup>30</sup> Annual Report of PKP PLK S.A. for 2016, p. 17.

<sup>31</sup> European Commission - DG MOVE (Mobility and Transport) - EU Country Scoreboard - [Investments and Infrastructure](#). Rating is based on a survey by the World Economic Forum, using a scale from 1 (extremely underdeveloped) to 7 (extensive and efficient).

<sup>32</sup> Polish Office of Rail Transport (UTK): [www.utk.gov.pl](http://www.utk.gov.pl), (accessed: 13.07.2018).

<sup>33</sup> Polish Office of Rail Transport (UTK) - Report on the railway transport market in 2017, 2018, p. 42.

<sup>34</sup> Annual report of PKP PLK S.A., 2016.

<sup>35</sup> [Resolution No. 144/2016](#) of the Council of Ministers of 23 November 2016 amending the resolution on the National Railway Programme until 2023.

## 5. AIR TRANSPORT

In 2017, Polish airports handled nearly 40 million **passengers**, which constitutes an increase of 18 % on 2016<sup>36</sup>. The largest number of passengers handled, i.e. 15.75 million, was at Warsaw Chopin Airport, followed by Kraków Airport (5.84 million) and Gdańsk Airport (4.61 million). Regional airports are characterised by a high growth rate in passenger numbers, increasing their market share to 61 % in 2017.<sup>37</sup> 2017 saw an increase not only in the numbers of passengers using Polish airports but also in the numbers of passenger-related operations, as well as in the seat occupancy rate. For the second consecutive year, the Polish aviation market generated better results than the European and global markets. Projections indicate that the number of passengers handled by Polish airports will double (to 80 million) by 2030<sup>38</sup>. However, the air mobility rate remains at a visibly lower level than in other Member States, despite a significant increase, from 0.16 in 2004 to 0.90 in 2016 (Germany = 2.45, France = 2.19 in 2016)<sup>39</sup>.

Three **air operators** dominate the Polish passenger air transport market, namely Ryanair with a 31 % market share, LOT (24 %) and Wizzair (21 %)<sup>40</sup>.

The **carriage of goods** by air is of marginal importance in Poland (around 84 000 tonnes in 2017), although it is characterised by a high growth rate of 17 % (compared to 2016). It is mostly centred on Warsaw Chopin Airport<sup>41</sup>.

Recent years have seen a dynamic development of **regional airports** in terms of quality and quantity. Newly opened airports have helped certain regions avoid further peripheralisation (this applies to Lublin and Olsztyn), and their accessibility has been further improved by the development of road and rail connections. The airports of Warsaw, Kraków, Gdańsk, Lublin and Szczecin are connected to the rail network.

The plan to create the **Central Transport Hub** (CTH) as a multifaceted transport centre for the entire country was adopted by the Polish government in 2017. The CTH is intended to become an international airport with a capacity of 45 million passengers a year in the first stage of development, and ultimately up to 100 million passengers per annum. The rail and road transport networks connected to it will significantly extend its scope. Investment in the new rail infrastructure should complement the existing rail network. Road infrastructure development will include the upgrading of the A2 motorway and the construction of the Warsaw Ring Road, as well as of several nodes and missing links, mainly in Mazowieckie Province. The construction costs of the CTH as a whole are estimated at between PLN 26 and 35 billion (or EUR 6-8.1 billion)<sup>42</sup>.

## 6. MARITIME TRANSPORT

The most important seaports in Poland are located in Gdańsk, Gdynia and Szczecin-Świnoujście. The **Port of Gdańsk** is the sixth largest port of the Baltic Sea, as well as being its second largest container port<sup>43</sup>. In 2017, the port handled over 40 million tonnes of cargo (105 % growth by comparison with 2007)<sup>44</sup>, accounting for nearly half of the total freight operations handled by Polish seaports (see Figure 6 below). Such good results can mainly be attributed to the development of the Deepwater Container Terminal (DCT), Poland's only deep-sea terminal, located in Gdańsk, which is able to receive large container vessels originating in the Far East. In 2011 the facility started handling the Maersk Line's E-type class container vessels with a capacity of 15 500 TEU<sup>45</sup>. It was opened in 2007 and is privately financed.

<sup>36</sup> Polish Civil Aviation Authority (ULC), <http://www.ulc.gov.pl>, (accessed: 13.07.2018).

<sup>37</sup> Author's own calculations based on data of the Polish Civil Aviation Authority (ULC) - [Passengers and air operations executed in domestic and international traffic, regular and chartered in 2015-2017](#), 2017.

<sup>38</sup> Polish Civil Aviation Authority (ULC) - [Projection of the number of handled passengers and passenger-related operations in Poland until 2035](#), 2017.

<sup>39</sup> D. Tłoczyński: Rynek lotniczy 2017. Dynamika. Wskaźniki. Prognozy. Raport. „Wiadomości Turystyczne”, October 2017.

<sup>40</sup> Polish Civil Aviation Authority (ULC) - [Statistics on regular carriage of passengers](#), 2017.

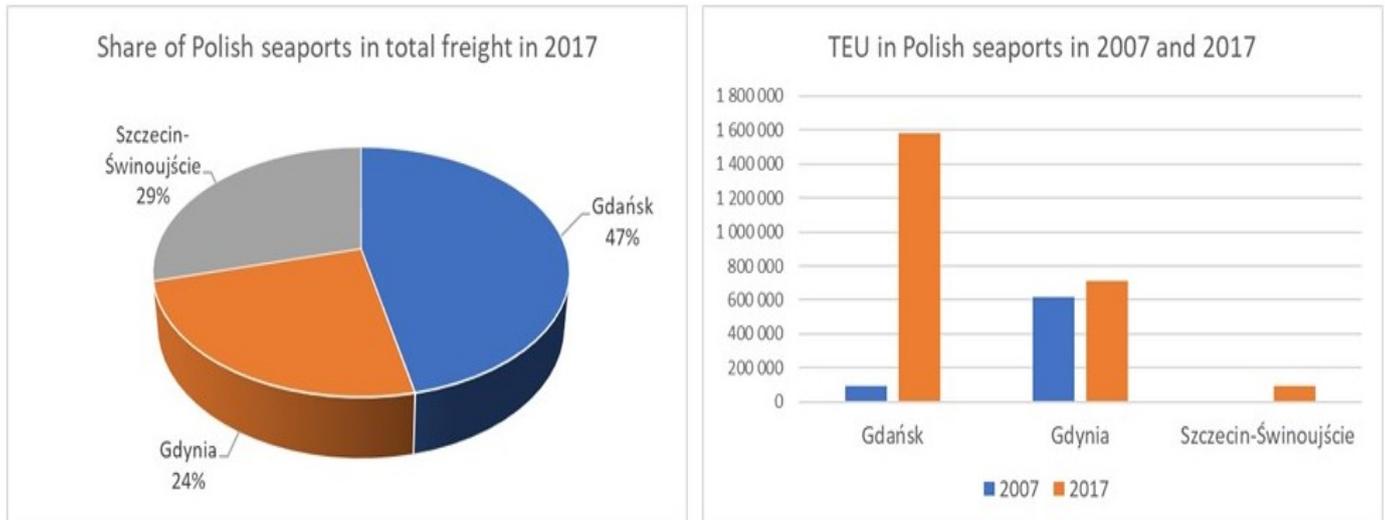
<sup>41</sup> Polish Civil Aviation Authority (ULC) - [Statistics on regular carriage of cargo](#), 2017.

<sup>42</sup> [Resolution No 173/2017](#) of the Council of Ministers of 7 November 2017 on the adoption of the Investment Preparation and Implementation Concept: Solidarity Airport – Central Transport Hub for the Republic of Poland.

<sup>43</sup> Polish Port Monitor - [Results of Top 10 Baltic container ports in first half of 2017](#), accessed: 27.08.2018.

<sup>44</sup> Official website of the [Port of Gdansk](#), accessed: 27.08.2018.

<sup>45</sup> Official website of the [Deepwater Container Terminal](#), accessed: 27.08.2018).

**Figure 6: Performance of Polish largest seaports in 2007 and 2017**

Source: Author's own analysis based on data of the seaports<sup>46</sup>

The **Port of Gdynia** is a universal modern port specialising in handling general cargo, mainly unitised cargo transported in containers and using a ro-ro system. It operates two container terminals and handles ferry connections to Scandinavia. The **ports of Szczecin and Świnoujście** form one of the largest port groups in the Baltic. They are situated on the shortest path connecting Scandinavia with central and southern Europe.

In 2016, the cargo shipped through Polish seaports was imported primarily from Russia (19.6 %), Sweden (11.8 %), Germany (8.5 %), Norway (5.0 %) and the Netherlands (4.6 %), and exported to Sweden (16.3 %), the Netherlands (14.7 %), Germany (9.8 %), the UK (5.6 %) and Belgium (5.0 %).

One of Poland's latest initiatives in the maritime sector is the planned construction of a **new waterway connecting the Gulf of Gdańsk with the Vistula Lagoon**, which aims at the economic revitalisation of the Warmińsko-Mazurskie Province in north-east Poland. This new canal, 1.3 km long and costing around PLN 900 million (EUR 210 million), is intended to enable maritime vessels of up to 100 m in length to reach the port of Elbląg. The project is likely to be launched in the last quarter of 2018 and should be completed by 2022, creating some 3 000 new jobs (directly and indirectly).

## 7. INLAND WATERWAY TRANSPORT

The main barriers to the development of **inland waterway transport** in Poland are the unsatisfactory technical condition of the infrastructure and the natural conditions (i.e. relatively small water resources). The majority of inland waterways are considered as having regional importance and are of navigation class I, II or III classes unsuitable for bigger units<sup>47</sup>. In addition, waterways' actual navigation conditions in most cases do not meet the parameters assigned in their classification<sup>48</sup>. Only 6 % of Polish inland waterways are of navigation class IV or higher (i.e. of international importance), and just a short section of the river Oder along the Polish-German border is included in the TEN-T core network.

The navigational conditions are reflected in the basic construction parameters of the rolling stock used for inland waterway operations, including a relatively low payload, as well as in the volume of transport<sup>49</sup>. In 2016, this transport sector had a share in tonne-kms amounting to 0.23 % of the freight market in Poland (taking into account road, rail and inland waterway transport)<sup>50</sup>.

<sup>46</sup> Official websites of the ports of [Gdańsk](#), [Szczecin-Świnoujście](#) and [Gdynia](#), accessed: 27.08.2018.

<sup>47</sup> A. Deja, A. Kopeć, P. Michałowski Analiza stanu żeglugi śródlądowej w Polsce. 'Autobusy. Technika, Eksploatacja, Systemy transportowe', 2017, No 12, pp. 519-520.

<sup>48</sup> Polish Ministry of Maritime Economy and Inland Navigation - [Assumptions for the development plans of inland waterways in Poland for 2016-2020 with 2030 perspective](#), 2017, p. 2.

<sup>49</sup> Polish General Statistical Office (GUS) - [Transport wodny śródlądowy w Polsce w 2017 r. „Informacje sygnałne”](#), 31.07.2018.

<sup>50</sup> Polish General Statistical Office (GUS) - [Transport. Activity results in 2016](#), 2017, p. 89

The **Oder Waterway** (E-30) is a part of the European inland waterway system thanks to its links with the Oder-Sprewe and Oder-Havel canals<sup>51</sup>. However, it needs to be substantially upgraded at an estimated cost of PLN 30.7 billion (elimination of existing bottlenecks, improvement to the Va navigation class, construction of the **Silesian Canal** and construction of the missing link Danube–Oder–Elbe)<sup>52</sup>. In 2017, the Oder Waterway accounted for 90 % of national freight transport by inland waterway in Poland.

The possibility of boosting inland waterway transport in Poland depends on improving the operating parameters of the waterways. Relevant strategic documents for transport in Poland provide for, inter alia, investment aimed at restoring the operational parameters specified in the so-called Classification Ordinance<sup>53</sup> and increasing the length of navigation routes having parameters of at least class III navigability.

## 8. TOURISM

The direct contribution of the travel and tourism sector to Poland's GDP in 2016 was PLN 33.7 billion (USD 8.5 billion), or 1.8 % of total GDP<sup>54</sup>. The tourist market in Poland is characterised by seasonality and spatial concentration (in coastal, lakeside, and mountain areas).

In Poland, the number of tourist **overnight accommodation** facilities totalled 10 500 in 2016 and accounted for 1.7 % of such facilities in the EU as a whole<sup>55</sup>. More than half of these facilities are situated in four regions: two coastal regions (Pomorskie and Zachodniopomorskie) and two regions with good conditions for mountain hiking and skiing (Małopolskie and Dolnośląskie). In 2017, there were nearly 4 000 hotels and similar accommodation facilities in Poland, constituting 43.5 % of total supply<sup>56</sup>. Furthermore, there were 85 accommodation places per 10 000 inhabitants of Poland. Importantly, the number of hotels has constantly been increasing in Poland. The highest increase has been recorded in the category of 3-star hotels, the number of which has tripled since 2005.

In 2017, 83.8 million **foreigners**, including 18.3 million tourists and 65.5 million same-day visitors, entered Poland (an increase of 4 % on the previous year). In the same year, foreigners visiting Poland spent a total of PLN 56.7 billion (EUR 13.2 billion), of which tourists spent PLN 32.8 billion (EUR 7.6 billion) and same-day visitors PLN 23.9 billion (EUR 5.6 billion)<sup>57</sup>. The average expenditure per foreign tourist was highest among citizens of China, the US and Finland. Average expenditure per foreign tourist visiting Poland was PLN 1 800 in 2017.

The largest number of **accommodation places** was recorded in Warsaw (6.2 million), followed by Kraków (5.3 million) and the district of Kołobrzeg situated on the Baltic Sea in Zachodniopomorskie Province (4.6 million). These top three locations represented 19 % of the total number of accommodation places provided for tourists in Poland in 2017<sup>58</sup>.

In 2017, foreigners and citizens of Poland crossed the country's border around 265 million times. In that year, there were 51.1 million checks on persons executed at 83 **border crossing points** located on Poland's eastern border with Russia, Belarus and Ukraine and at the country's airports and seaports<sup>59</sup>. The main modes of transport used were road transport (69.5 % of all crossings) and air transport (over 28.5 %)<sup>60</sup>. Poland's eastern border is a border of the European Union and is characterised by heavy frontier traffic. However, the traffic rate varies between areas of the country. Between 2013 and 2017, the highest increase in the number of foreigners crossing Poland's eastern border was recorded at the Polish-Ukrainian border crossings (from 7.3 million to 10.4 million). Significantly lower

<sup>51</sup> Polish Parliament (Sejm) - [Act No. 79](#) of the Council of Ministers of 14 June 2016 on adoption of 'Assumptions for Plans for the Development of Inland Waterways in Poland for 2016-2020 with a Perspective for 2030'.

<sup>52</sup> Ibidem.

<sup>53</sup> Ordinance of the Council of Ministers of 7 May 2002 on the classification of inland waterways (Journal of Laws 2002 No 77, item 695).

<sup>54</sup> World Travel and Tourism Council - Travel and Tourism Economic Impact 2017 - [Poland](#), March 2017.

<sup>55</sup> Polish General Statistical Office (GUS) - [Tourism in the European Union](#), (accessed: 16.02.2018).

<sup>56</sup> Publishing House of Polish General Statistical Office (GUS) - [Tourism in 2017](#), 2018, p. 17 et seq.

<sup>57</sup> Polish Ministry of Sports and Tourism - [Tourism in Poland](#), 2017.

<sup>58</sup> Publishing House of Polish General Statistical Office (GUS) - [Tourism in 2017](#), 2018, pp. 17 et seq.

<sup>59</sup> Publishing House of Polish General Statistical Office (GUS) - [Tourism in 2017](#), 2018, pp. 23-24.

<sup>60</sup> Publishing House of Polish General Statistical Office (GUS) - [Tourism in 2017](#), 2018, p. 37.

numbers were recorded at the Polish-Belarus border crossings (up from 3.9 million in 2013 to 4.1 million in 2017), with a decrease at the Polish-Russian border crossings (down to 1.3 million in 2017)<sup>61</sup>.

The restoration of the inland waterway connection between Warsaw and the **Masuria** (a region in north-eastern Poland famous for its 2 000 lakes) is one of the actions designed to improve navigability for tourist purposes. Work on the connection between the capital city and the nearby Zegrze Reservoir through the Żerański Canal has already been completed, with the remaining tasks expected to be realised in the coming year(s)<sup>62</sup>.

**Podkarpackie Province** has outstanding tourist amenities, although their potential has not been properly exploited to date. The reasons for this situation include the peripheral location of the region and the relatively low level of transport and tourism infrastructure development. The Bieszczady National Park is an area of unique natural value. It was established in 1973 and is now the third largest national park in Poland, covering an area of 292 km<sup>2</sup>. Podkarpackie Province is the second region in Poland in terms of afforestation rate (forests cover 38.6 % of the country's total area). Areas of special natural value under legal protection cover nearly half of the territory of the province (44.9%).

Tourism is one of the priorities within the Podkarpackie Province Development Strategy (aim: developing a competitive and attractive market offer based on the significant tourist potential of the region). This goal is to be achieved through the development of tourist attractions and tourist infrastructure, increased competitiveness of tourist products in the leading forms of inbound tourism, and the development of tourist promotion and partnership supporting inbound tourism<sup>63</sup>.

In 2017, the number of bed places in Podkarpackie Province amounted to 33 000, or some 4 % of all accommodation places in Poland<sup>64</sup>. Within the province, there are 12 border crossings (including the Rzeszów airport), which were crossed by more than 13 million people in 2017 (representing over one fourth of all border crossings in Poland).

\* \* \*

## Further Information

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<sup>61</sup> Polish General Statistical Office (GUS) - Department of Statistics, Tourism, Sport, Culture and National Heritage - [Passenger border traffic at border crossings with Ukraine, Belarus and Russia](#), 2018.

<sup>62</sup> [Gospodarkamorska.pl - MG MiŻŚ zapowiada przywrócenie żeglowności szlaku łączącego Warszawę z Mazurami](#); accessed: 27.08.2018.

<sup>63</sup> Strategy for Podkarpackie Province Development 2020. Self-Government of Podkarpackie Province, Annex No 1 to Resolution No XXXVII/697/13 of the Regional Assembly of Podkarpackie Province in Rzeszów of 26 August 2013, pp. 37 et seq.

<sup>64</sup> Publishing House of Polish General Statistical Office (GUS) - [Tourism in 2017](#), 2018, p. 30.