



## Rail freight operator - Poland case study

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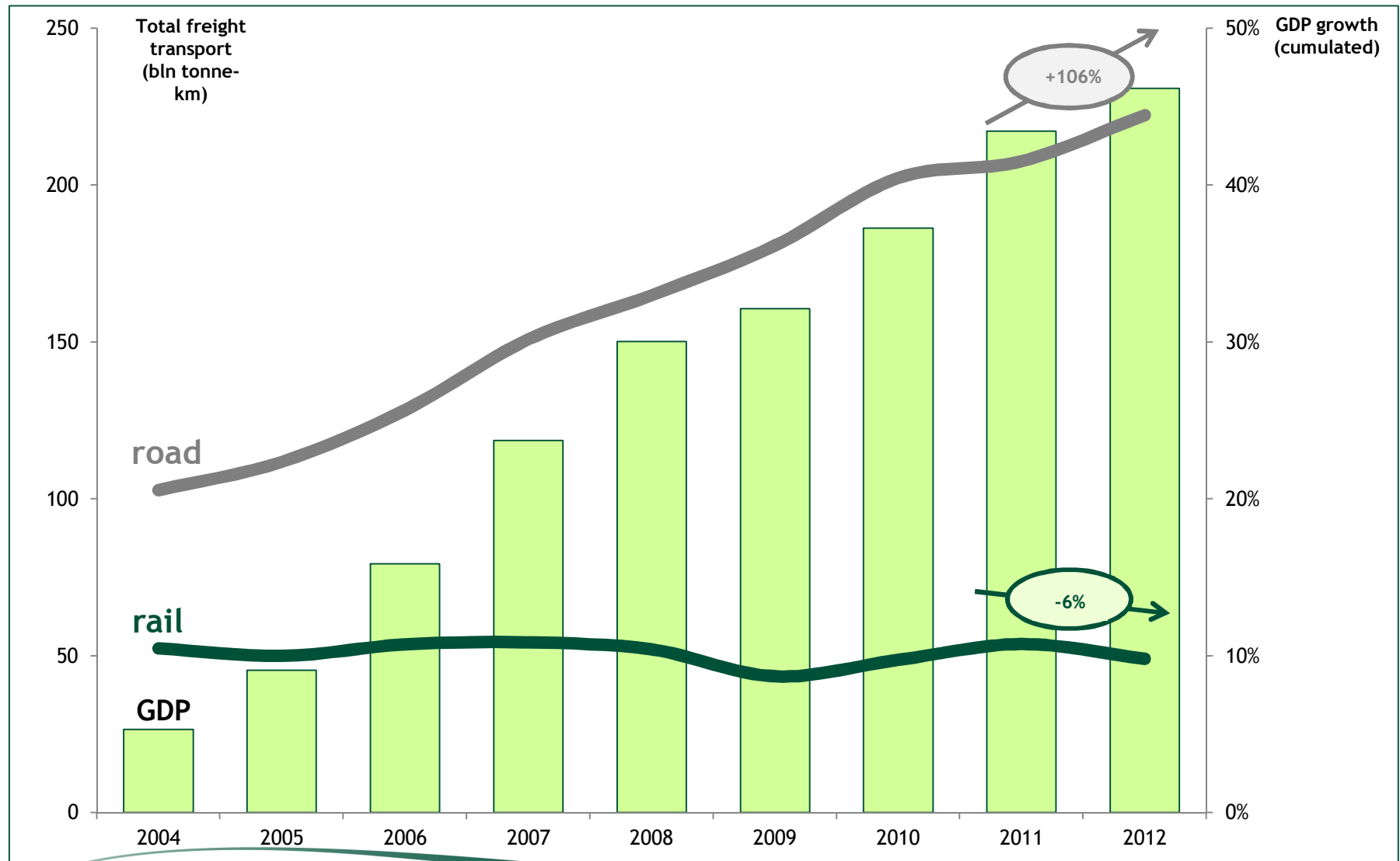
# Freightliner in Poland and Germany - growth from start up

- Part of Freightliner Group
- First transports in Poland and cross-border transports with Germany in 2007
- Presence across Poland, east and north Germany
- Trademark for efficient & reliable transport service
- Focus on heavy haulage of bulk materials
- Modern locos (with cross-border capability) and bulk wagons
- Locomotive stays with the train - stopping at border station for 5-10 min.



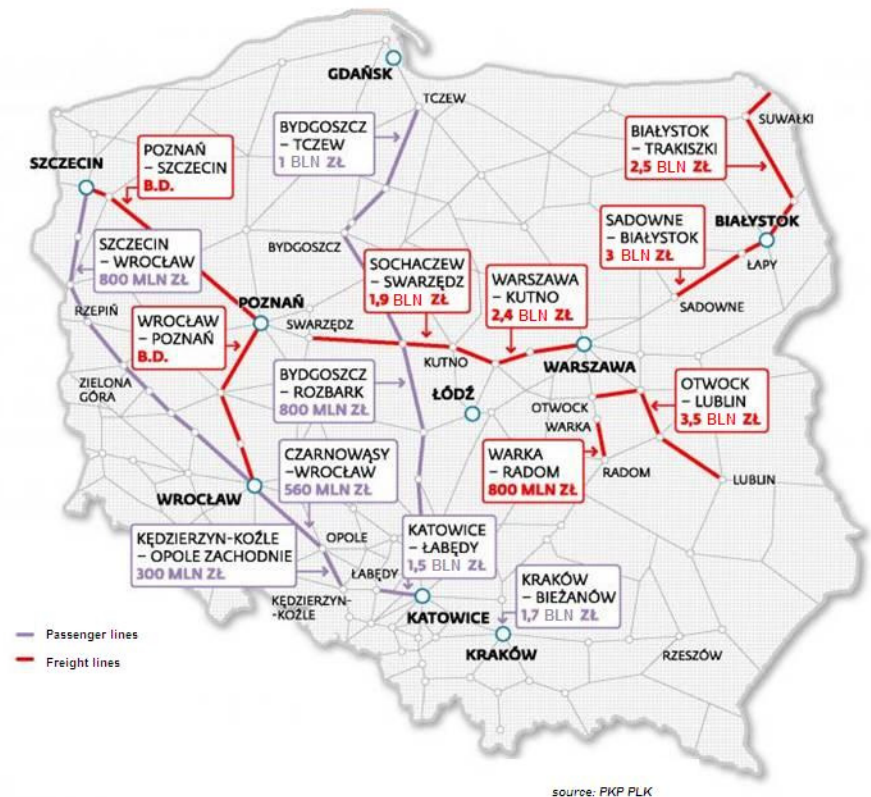
FPL + FDE Statistics		No.
Volume per annum		> 8 mln tonnes
Locomotives (diesels & electrics)		> 25
Wagons (bulk)		> 1000
Employees		200
Trains per week		up to 130

# Transport market development in Poland (2004-2012)



# Rail Infrastructure in Poland

- High access charges and low quality after 15 years of negligence:
  - Speed and axle loads limits
  - Numerous bottlenecks
  - Lack of capacity in industrial areas
- Chance for change: EU funds, but:
  - Unequal treatment of passenger and freight traffic
  - IM prefers big and expensive projects
  - In some cases „modernisation” results in worsening of conditions for freight
- Infrastructure access charges reduced by 20% in December 2013 → not sufficient to increase rail competitiveness with road

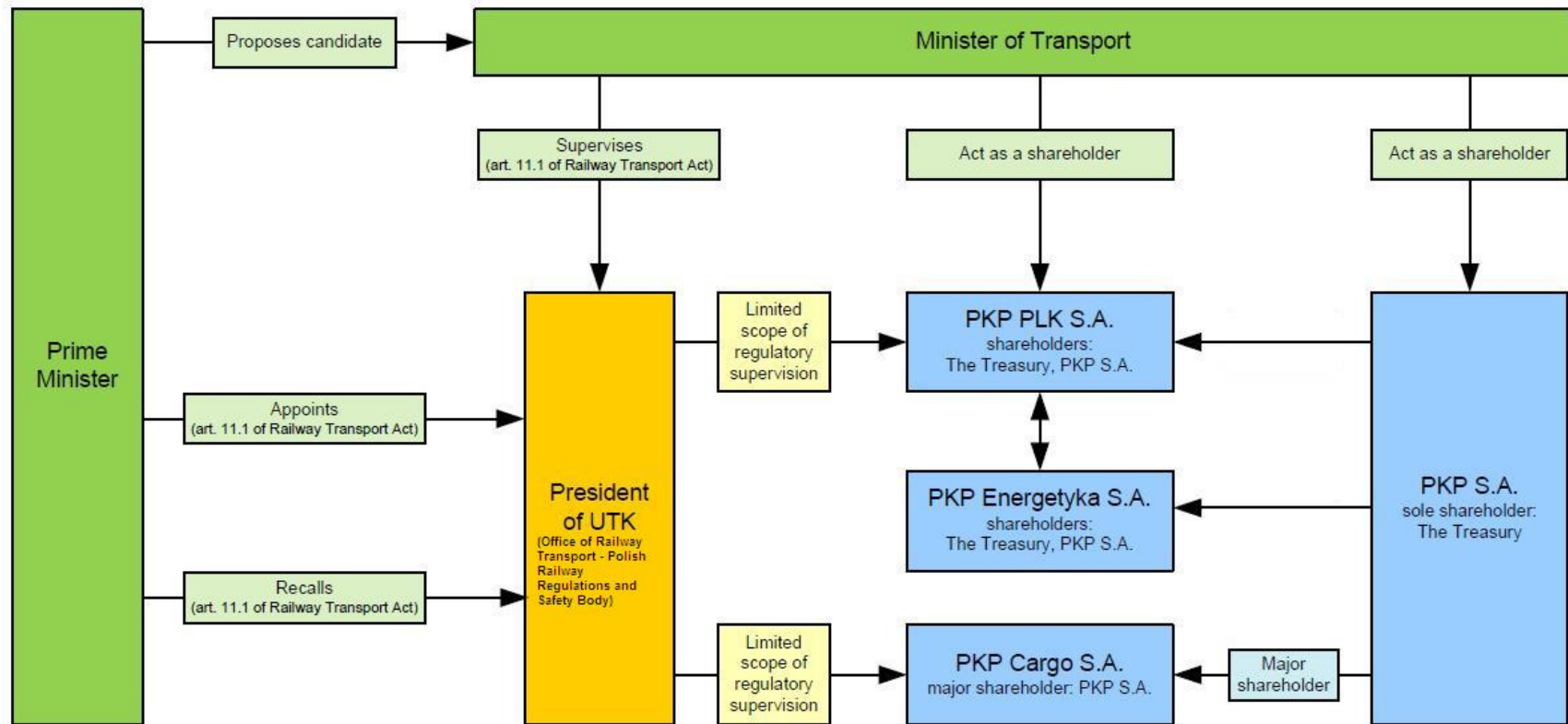


- Rail infrastructure investments:
- > €6bn during 2005 - 2013
- > €14bn planned for 2014 - 2020

## Necessary changes in rail infrastructure (Poland & beyond)

- Increase of allowed train length to 750 m:
  - Critical requirement for domestic and international freight corridors
- Increasing allowed axle load to at least 22,5 t:
  - Critical requirement for main railway lines, domestic & international freight corridors
  - Increase on the network of the industrial district of Silesia
  - Increase (verification) on sidings belonging to mines and power stations
- Removal of bottlenecks on the railway network, including point speed limits (e.g. at railway crossings)
- Address infrastructure access charges:
  - Further reduction in charges - bottom-up approach to calculation of marginal costs of rail freight (Recast of 1<sup>st</sup> Railway Package)
  - Long-term stability of charges enabling long-term investments
  - Implementation of incentives for the Infrastructure Managers to increase efficiency and deliver value for money

## Strengthening the role of the regulator (Poland and beyond)



**Market needs a strong regulatory body that is empowered sufficiently even though if the issues concern historical national operators!**

# Rail Freight Corridors as a tool for Single European Railway Area (SERA) implementation

- Locomotive and rolling stock certification - strengthening of ERA role
  - Need for one single European rolling stock authorisation valid in all EU countries
  - Avoiding duplication between ERA and NSA/Regulators
- Path allocation systems
  - Individual scheduling (annual and spot timetable) rather than Pre-Arranged Paths (PaPs)
- Rail infrastructure
  - Obligatory technical standards within all RFCs: at least 750m and 22,5tons/axle **or more!**
  - Elimination of bottlenecks
- Access charges and energy cost harmonisation
  - Still at unacceptable high level in many countries