Developments in the Polish Motorway System and the Impact on Baltic Ferry Services

Elzbieta Kapsa
Technical University of Gdansk, Poland

Michael Roe
University of Plymouth, UK

The Polish ferry sector has to operate in a specific international environment which has an essential and highly significant impact upon its market position and shapes the direction of its development. This broad market and operational environment consists of a number of technical, economic and socio-political contexts which vary considerably in character and their relative importance. In this paper we shall examine the characteristics of the market as it stands in late 2001 and early 2002 and will then go on to look at one issue in particular - that of the development of the Polish motorway programme, its projected links with the Polish ferry ports in Gdynia, Gdansk and Swinoujscie and the prospects for the short-term future for the ferry services and their highway connections in the light of the impending entry to the European Union for Poland.

1. Introduction

The Polish Ferry Market

The Baltic Sea is characterised by high activity in ferry and roll on/roll off shipping; however it is also the case that separate regions of the Baltic Sea are notable for substantially different densities of ferry connections. This latter feature is a function of the variations in markets that exist and also the variability in highway connections between different countries of the region.

The highest concentration of short sea and roll on/roll off services is to be found in the south-western part of the Baltic Sea and this is largely a consequence of the economic development of the countries of that region – particularly Germany - and the intensive trade networks that have developed between them.

Despite the relatively small size of the Baltic Sea, the volume of total cargoes which are turned over amounts to 8% of world seaborne trade, and this figure is far more than would be expected from a region of this size. As a consequence, there are about 40 ferry operators on the Baltic Sea operating in total about 130 ferries, largely on international routes.

For the convenience of this paper we can identify four main transport corridors on the Baltic Sea [Debicka, 1996]:

- the western route: linking Scandinavia, Germany and Poland - totalling around 75% of the entire passenger ferry transportation on the Baltic Sea;
- the central-eastern route: linking Sweden with Finland, Russia and Estonia and including over 20% of passenger ferry transportation;
- the east-west route: linking Finland with Germany and Poland - serving only around 0.12% of Baltic Sea traffic;
- the central route: linking Sweden with the Gdansk and Riga agglomerations, serving 3.5% of passenger ferry traffic.

By far the most significant passenger trades are those between Sweden-Denmark and the domestic Danish routes, which carry some 24 million passengers a year (around 22% of the total share) and 23 million passengers a year (around 23% share) respectively. Lying a considerable way behind in significance are the Denmark-Germany, domestic Norwegian and Swedish, and Finland-Sweden routes.

The Polish ferry shipping industry, despite its central geographical position on the Baltic Sea, is a sector of relatively low intensity ferry traffic. At present, the share in Baltic ferry transportation amounts to only around 1% in total passenger numbers and around 5% in cargo shipments.

At the turn of the millennium, there are three ferry shipowners operating on the Baltic Sea routes to and from Poland. These are the Polish Baltic Shipping Company (PZB or Polska Zegluga Baltycka) trading as "Polferries", Unity Line and Stena Line. The first two are both entirely Polish owned, whilst the latter is owned by the large Swedish ship operator of the same name. The most significant operator to and from Poland, with respect to the number of ferries and the carriage of cargo or passengers, is PZB operating a number of lines under the commercial name of Polferries. Its headquarters is in the small coastal town of Kolobrzeg, from which no ferries operate, and its ferry base and route locations are in Swinoujscie and Gdansk in the north west and north east of Poland respectively.

It has at its disposal four owned and one chartered passenger-car ferries and five tramp ships the latter amounting to only a small tonnage. The latter are used mainly for coastal or intra-Baltic small bulk work and play no part in the ferry operations. PZB used to own and operate a high-speed catamaran on the western Baltic (Swinoujscie–Malmo) until the summer of 2000 when the vessel was chartered out. It was sold in 2001 to an Estonian ferry operator for use in the eastern Baltic Sea. In addition PZB also operate the Port of Kolobrzeg (specialising mainly in small bulk commodities such as timber, sand and gravel etc.) and ten travel agencies located across the country from Warsaw to Gdynia.

At present PZB provides services on four ferry connections [Vainio, 1999]:

- Swinoujscie-Malmö (Sweden) (123 miles) - the main