

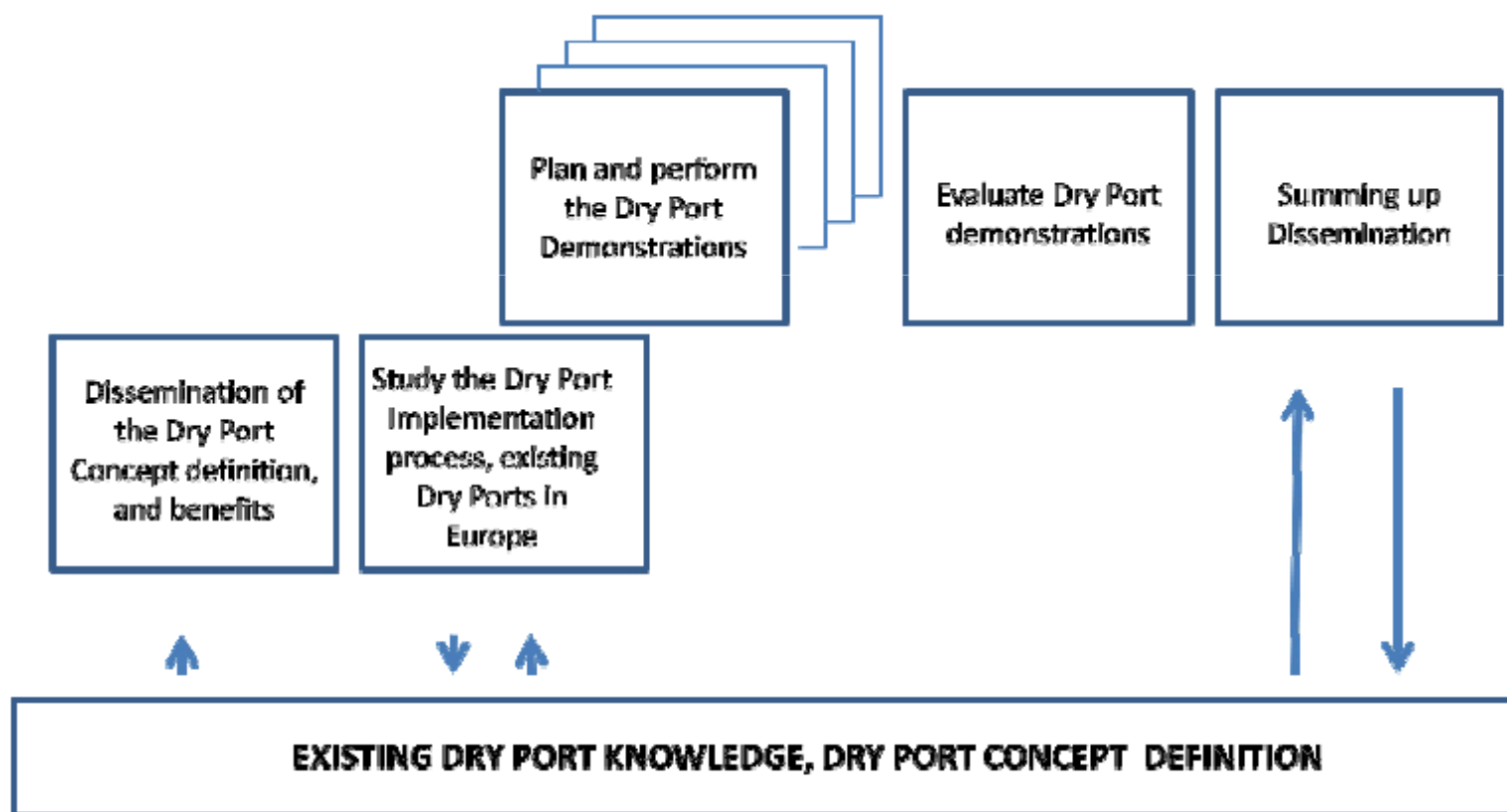
Dry Port in warminsko-mazurskie region: a concept development

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Dry Port concept in WP5.1

TRANSBALTIC WP 5.1 DRY PORT DEVELOPMENT



Warmińsko-mazurskie: general data

- Region located on the eastern border of EU;
- Border with Russia (Kaliningrad Province);
- Lower density of transport networks;
- Balanced layout of transport network;
- High level of economic specialization.



Strenghts of the region

Macroeconomic dimension

- **Relatively high share of industrial processing in gross added value;**
- **Differentiation of industrial sectors;**
- **Industries with high innovation potential (furniture industry, food production, tourism related activities);**
- **Presence of large domestic and foreign companies;**
- **Appearing areas with higher development potential;**
- **Year average GDP increase above the European average.**

Source: ROP of warminsko-mazurskie region, 2006

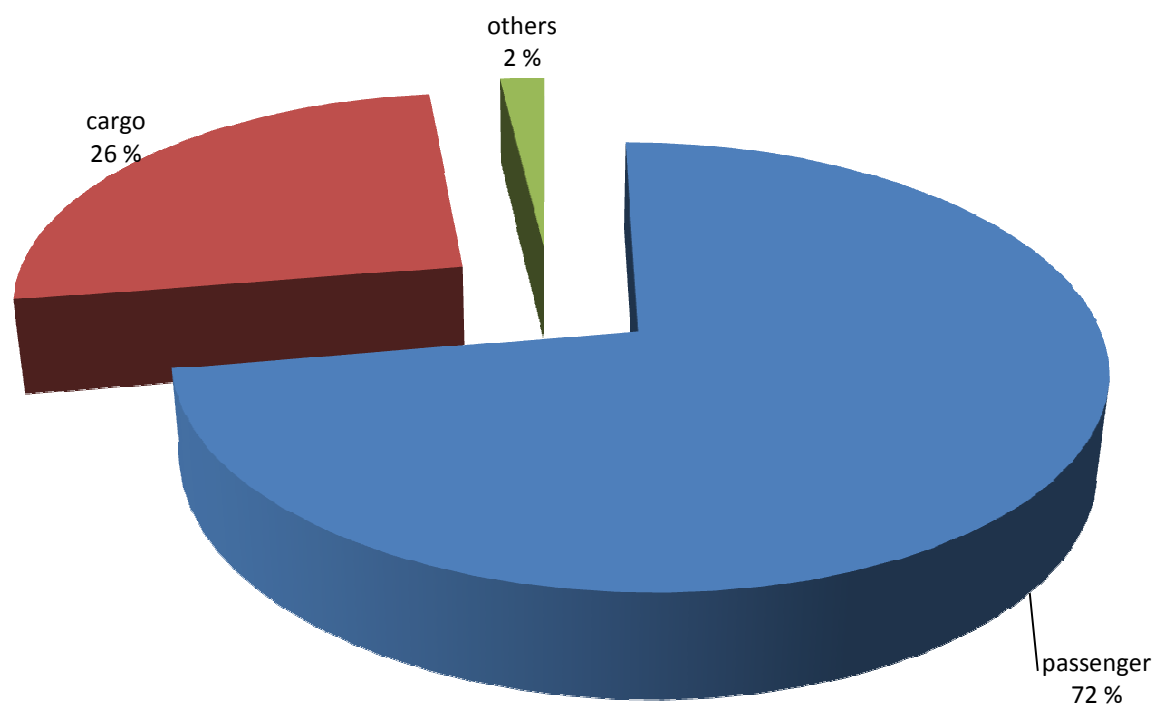
Infrastructural dimension

- **external European Union border;**
- **Location in the Baltic Sea Region;**
- **Favourable natural conditions for development of tourism and “clean industry”;**
- **Available areas for investments;**
- **Even distribution of towns with wider than local functions;**
- **Closeness to the projected A1 and Via Baltica roads linked in parallel direction by road No. 16;**
- **Evenly distributed and sufficient network of roads.**

New tracks to be constructed
Construction if increased demand

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Construction if increased demand

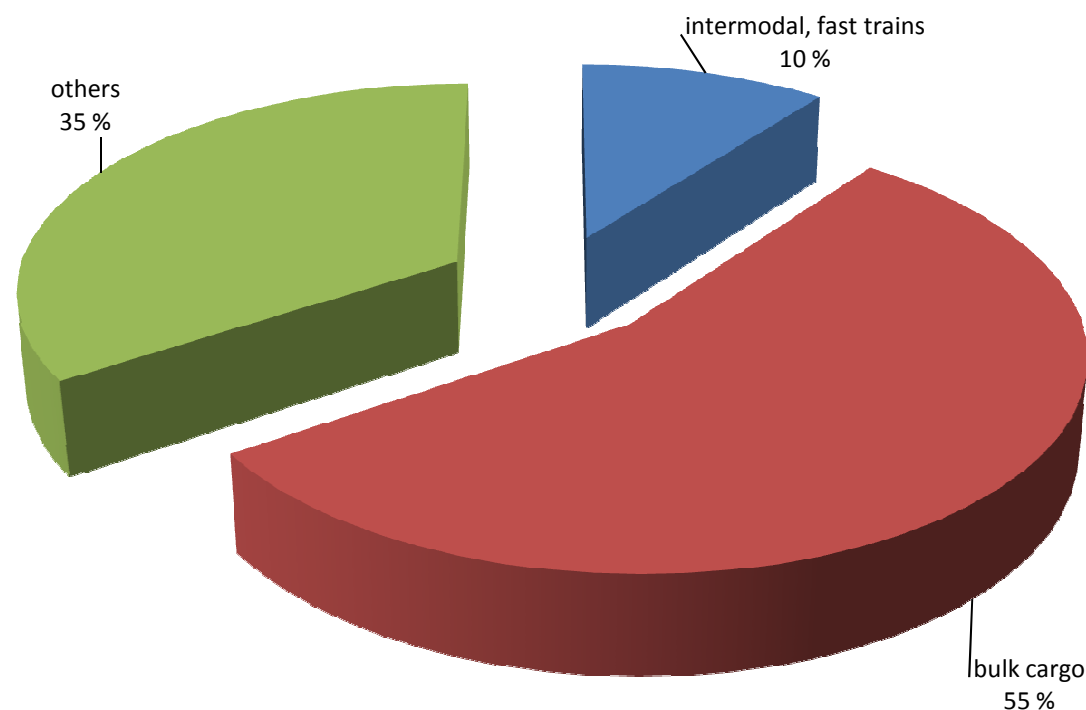
Structure of railway traffic in the region



Density of traffic in 2007:

1799 cargo train-kms per km of railway network of warminsko-mazurskie

Structure of railway cargo traffic in the Region



Data for 2007

Logistic operations between region and chosen countries in 2008: export

country	unit	mode of transport				total
		unidentified	maritime	rail	road	
Estonia	tons	3 225	0	0	1 321	4 546
Finland	tons	5 276	9 734	0	1 091	16 100
Lithuania	tons	42 228	0	0	19 850	62 078
Latvia	tons	9 453	0	0	3 491	12 944
Russia	tons	0	278	1 325	65 995	67 598
Sweden	tons	10 764	11 380	87	6 506	28 736
Germany	tons	113 574	24	96	116 133	229 827
Total, countries above	tons	70 946	21 393	1 412	98 252	192 002
TOTAL	tons	374 868	70 896	3 411	480 422	929 598

Share of railway in export in 2008: 0,4%

Logistic operations between region and chosen countries in 2008: import

country	unit	mode of transport				total
		unidentified	maritime	rail	road	
Estonia	tons	7 289	0	0	28	7 317
Finland	tons	824	0	0	2 286	3 110
Lithuania	tons	35 752	0	0	84 936	120 688
Latvia	tons	11 896	0	0	1 194	13 090
Russia	tons	123	6 400	380 029	16 997	403 549
Sweden	tons	5 052	4 436	0	2 008	11 496
Germany	tons	65 870	11	14	72 006	137 901
Total, countries above	tons	60 936	10 836	380 029	107 450	559 251
TOTAL	tons	280 185	201 956	598 681	334 056	1 414 878

Share of railway in import in 2008: 42%

Unbalanced role of railway in external trade of warminsko-mazurskie

- **High share of railway in import: dominant coal and mineral fuels, also wood;**
- **Very low share of railway in export: dominant furniture and other goods like chemical industry (rubber);**
- **52% of regional export is being serviced by road transport;**
- **Railway is crucial transport mode in context of dry ports.**

Warminsko-mazurskie: crossborder dimension

- **Road border pass : Bezledy – Bagrationowsk, Gronowo – Mamonowo, Gołdap – Gusiew.**
- **Rail border pass: Braniewo (Gronowo)– Mamonowo, Skandawa – Zeleznodorożnyj, Bartoszyce (Glomno) – Bagrationowsk.**

Road border passes of warminsko-mazurskie

Border pass	Daily max. capacity			Vehicles pro year
	cars	lorries	buses	
Bezledy - Bagrationowsk	3500	250	60	
Gronowo-Mamonowo	1500	25	25	580000
Goldap - Gusiew	700	300*	50	680000
Grzechotki – Mamonowo II	6000			To be opened in 2010

***up to 7,5 tonns**

Rail border passes of warminsko-mazurskie region

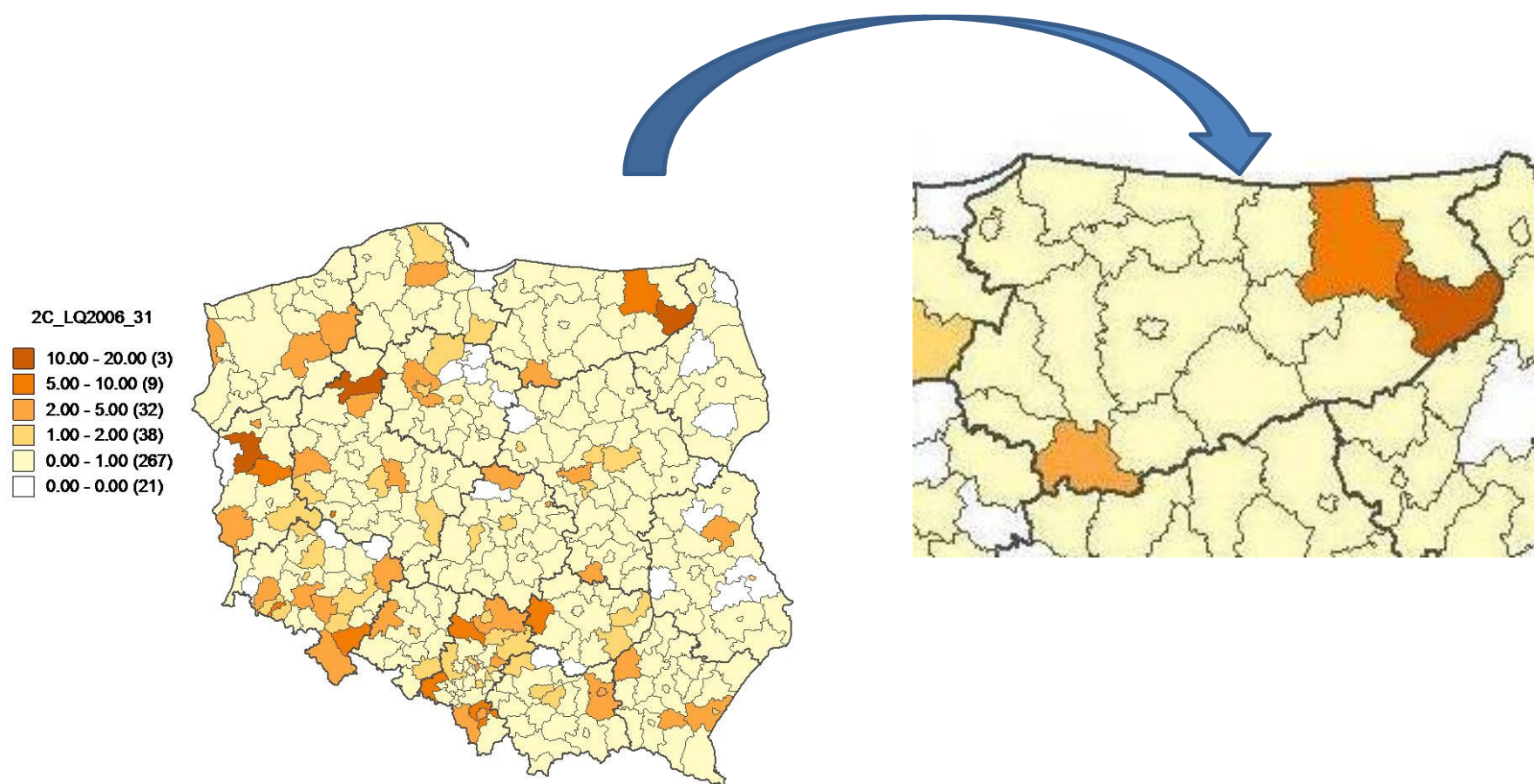
przejście	Yearly number of trains	Utilisation of capacity
Braniewo (Gronowo) - Mamonowo	1943	15%
Skandawa - Zeleznodorożnyj	1033	
Glomno - Bagrationowsk	closed	

Warmińsko-mazurskie: General economic profile

- **2,9% of employees of Poland;**
- **High level of export concentration;**
- **Main article groups in export are furniture, rubber articles, paper and dairy products;**
- **Intensive export links in 1995 were existing between region and Germany;**
- **Intensive export links in 2006 are existing between region and France and Spain¹, and with Lietuva and Lithuania.**

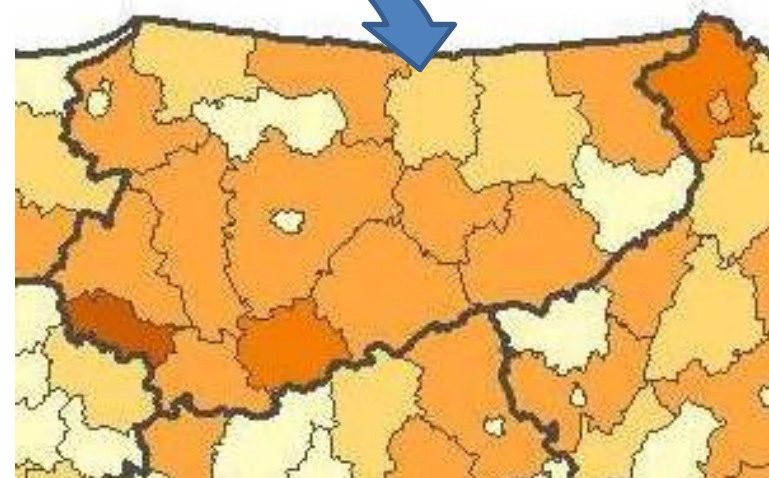
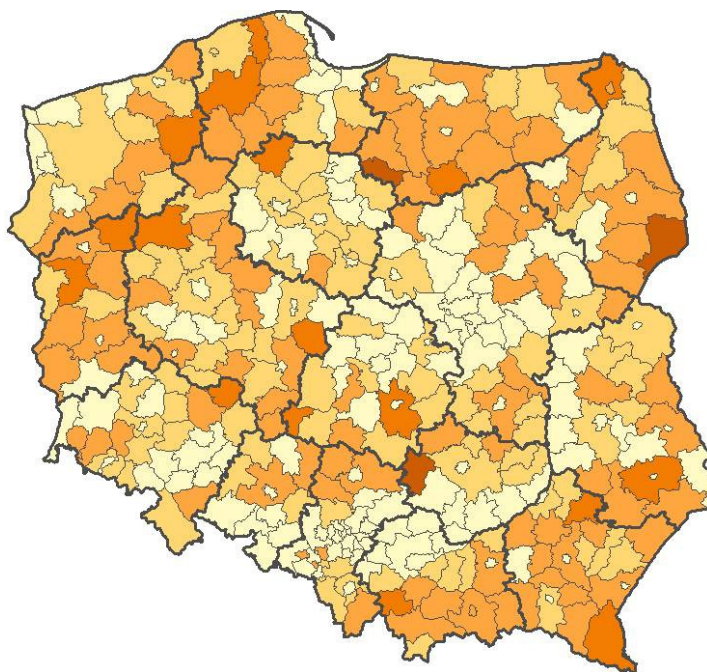
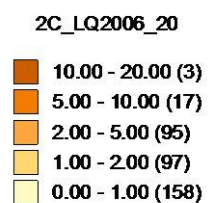
Lokalizacja przemysłu a konkurencyjność polskich regionów. Red. A. Zielińska – Głębocka. Wyd. UG, Gdańsk 2008, s. 134-135

Furniture



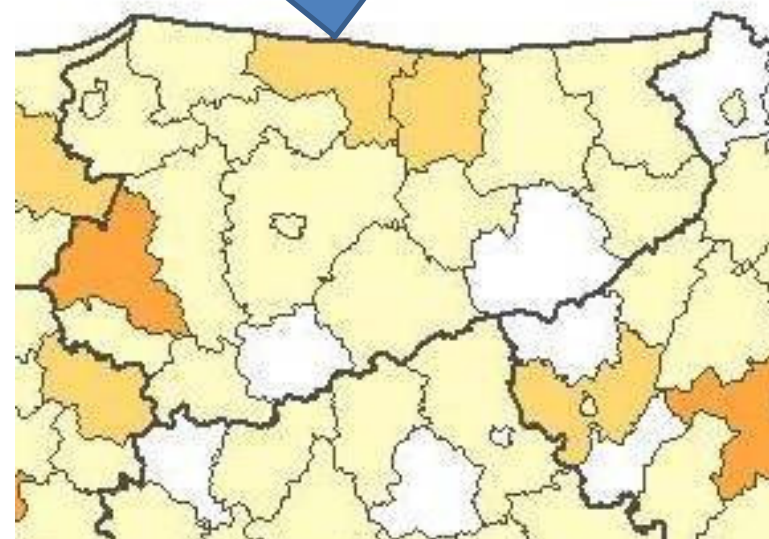
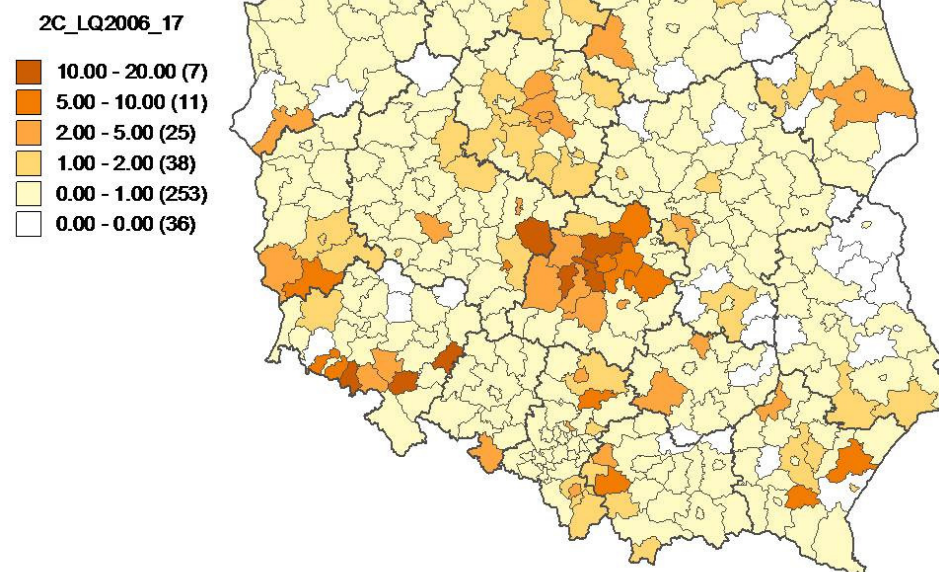
Location quotients at county level

Chemical products



Location quotients at county level

Paper



Location quotients at county level

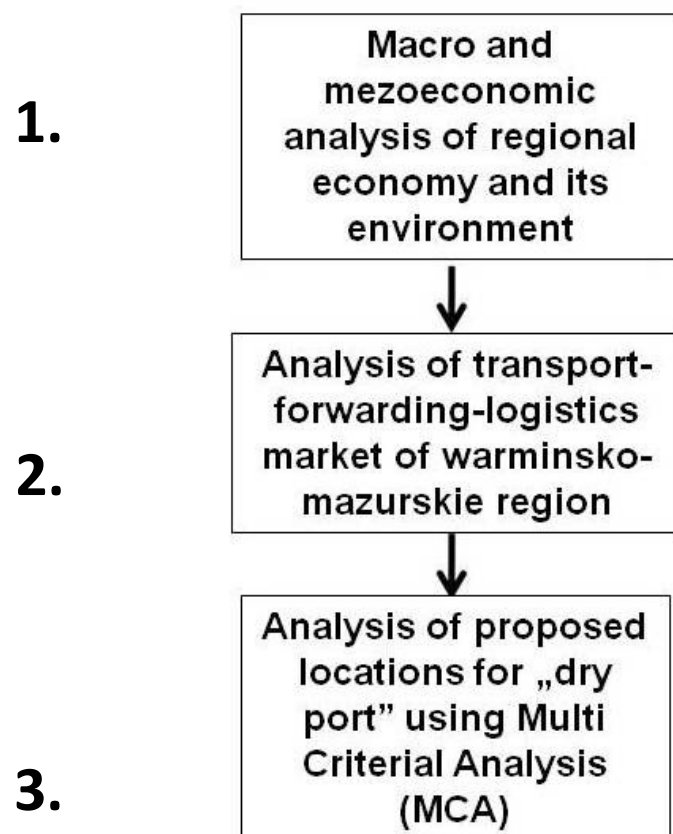
Opportunities and threats of dry port location in warminsko-mazurskie region

Threats

Opportunities

- **Proximity of 1st and 6th TEN-T corridors;**
 - **Development of border links with Russia;**
 - **Specialization of production and export;**
 - **Dynamic economic development;**
 - **Proximity of sea port complex of Gdansk – Gdynia.**
- **Low share of railway in export;**
 - **Low number of containers in railway operations;**
 - **possibility of dry port development in direct hinterland of Gdansk – Gdynia seaport complex (competition of location);**
 - **Low quality of railway infrastructure;**
 - **Unstable and unpredictable process of setting of rail infrastructure access charges (Polish infrastructure manager PKP PLK).**

„Road map” for preparation of „dry port” concept for warminsko-mazurskie region



preparation of „economic profile” of the region, including its specialization on county level and analysis of economic processes in last few years. An analysis should include also neighbouring podalskie region.

analysis of present and future state of transport-logistic infrastructure of the region (i.e. capacity of railway lines, Polish seaports, evaluation of planned and current investments which might affect dry port location), biggest companies of the region (marketing research among potential stakeholders of the project)

evaluation of particular locations using MCA (Multi Criterial Analysis) which should include scope of criteria agreed with regional authorities