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THE DEVELOPMENT OF LAND-BASED WHEEL TRANSPORT MARKET IN THE LIGHT OF POLISH TRANSPORT POLICY

1. The implementation of transportation and logistics policy

Transport activity is the indispensable factor influencing the development of the country. It creates the shape of cooperation and development of every single part of the economy. Along the transport lines is the place where new industry and commerce are situated.

Polish logistical sector is influenced by the EU sector policies (mainly joint transport policy), economic liberties, competition policy, small and medium companies' policy, cohesion programmers and the regional policies. European Community doesn't provide any kind of joint logistics policy yet, though the idea is being discussed [5].

It is crucial to understand the difference between both: the transportation and logistics policy the government can apply.

Apart from the programming and developing transport activity, the main aim of the transportation policy is shaping the country's transportation system, based upon [3]:

- optimization of the system's growth and material development,
- influence on the on appropriate course of transportation processes and phenomena, inside the branch as well as on the relation between transport and it's environment (between carriers and their customers),
- impact on the development of the entpreneurs ensuring optimal market functioning,
- effect on development of appropriate transportation standards, in the matter of technical equipment, transportation devices, safety in transport and the assurance of terms of its implementation.

Transport policy, as almost any other sector policy, is set up on two levels: conceptual and legal. The first is the philosophy of integrated transport system, whilst the second level contains detailed resolutions [6].

By the logistics policy we understand the intentional, direct and indirect government influence on the improvement of the effectiveness and efficiency of the products and the accompanying information flow between the members of supply chain.

The instruments and aims coordination may affect different branch policies, not only connected with the industry, trade and transport, but also the monetary, fiscal, agricultural and others. Logistics policy doesn't acquire whole sector policies, but only their parts, necessary to coordinate them [2].

The first country to improve the coordination between the ministries regarding the logistics sector was Japan. In the year 1997 the Joint Program of Logistics Policy was introduced. Four years later the Japanese government launched the separate Distribution and Logistics Policy Division inside the structure of newly created Ministry of Economy, Trade and Industry (METI). The new division established new METI's Program for Efficient Distribution and Logistics, focusing on the use of information technology in Japanese logistics branch.

This program obligates the government to:

- deregulate the logistics and telecommunication market,
- support the creation and improvement of the needed infrastructure,
- promote modern solutions in companies' logistic systems.

It is materialized by the coordination of activities of ministries in order to level the conditions of logistic activity in the most economically important parts of the country, the information and advisory provided by the government as well as by the entpreneurs. This includes also the promotion of standardization of the information technology used in logistics branch, like the RFID identification system [7].

In Eastern Europe, the Hungarian government faced the challenge of effectiveness improvement on the logistics market. „Hungary as a logistic center" project obligates the Ministry of Economy and Transport to effective use of the country's transit potential. The program concentrates on rapid infrastructure development, use of the Hungary's geographical position at the crossing of many Trans-European corridors, access to the Eastern markets, entpreneurs investments and specialized education. There are also shown the problems of legal and financial nature and the competition among neighboring countries, which can sooner reach the position of the regional logistic centre. The document doesn't mention the use of modern information technology, characteristic for logistics policy [4].

Previous development of logistics focused on the micro scale aspects has reached a new macro economical level, which became the area of interest by the governments' economical policies. The goals and instruments of the transport policy are broadened by joint production, trade and service development. Some countries noticing the need of logistics policy management are also remarking the connection between such activity, the competitiveness improvement and the accelerated expansion of its native investors.

2. Situation on Polish transport market after EU-accession

At the present moment the condition of the transport tracks in Poland has become an obstacle preventing development of the economy. Foreign investments are located mostly in the border regions of our country in purpose of avoiding the contact with the Polish transport system.

On the 1^{st} of May 2004 the Common Market of 25 members of the European Union was opened for the Polish transport branch. It is not yet entirely deregulated, even though the biggest advantage of the accession is noticeable: the enlargement of the internal market.

The total deregulation means the access to the biggest transport market in the world and the influence of foreign entpreneurs from the other European countries.

Polish carriers have already overtaken part of the cargo transport streams between members of European Union. The main reason for that is the low-cost advantage allowing settling the prices on the competitive level. This advantage though will be impossible to be kept along with the proceeding integration of Poland and the other members of the EU what makes necessary securing the full competitiveness of Polish companies on the deregulates European market.

Thanks to the EU-accession Polish logistics entpreneurs have received the new conditions of the market access as the different international transport limits have been abandoned. It simplified the cross-border goods circulation, new sources of capital have become accessible, e.g. the EU structural funds, the customs procedures of the trade exchange with the third party countries have been simplified, the infrastructure development and the uniformity of the law regulations have been hastened. These factors accelerate the positive changes on the Polish logistics market, like branch consolidation, increased competitiveness, higher level of service, increased international cooperation. Moreover, what should be considered as the most significant – the growing importance of Poland as the logistic back-up in the international market, according to transit location of the country in the middle of Europe.

There are certain dangers connected to the common market access like the advantage of foreign companies in getting capital support and their experience, higher financial surcharges (VAT, toll charges), company takeovers, higher costs and client expectations, small company bankruptcies and the lack of experience in full logistical service among Polish entpreneurs.

On the road transport market the charges have fallen down by 20-30% after the EU-accession without the expected increase of demand. Also there is a noticeable rise of the piece-goods transport importance what makes big international companies more competitive. The low-cost advantage of Polish carriers is depreciated by worse rolling-stock usage and the route planning. That causes more difficulties for Polish entpreneurs, nevertheless they have the chance to get the advantage on the South-Eastern European markets, which are less interesting for the Western competitors. Some of international logistic companies are already preparing themselves to enter the Polish internal transport market after its liberalization. They gather the staff from Poland to train them and settle branch offices after the end of transition period for local transport. The other way for smaller companies is also to acquire the narrow specialization, in which the profit is unreachable in the bigger scale.

Rail transport liberalization is slowly proceeding. There are over 45 private cargo companies providing both, the inbound cargo transport and the international routes. The private operators mainly took over the mass transport from the road carriers. Unfortunately, most of the newly built logistic centers in Poland don't have access to the railway network (one of such examples is quickly developing logistic center Prologis Park in Bielany Wrocławskie, just beside the A4 motorway).

As a reaction to this PKP Cargo, as the biggest rail operator, insisted on establishing some railway intermodal centers in whole country. The company awaits the support from the government. So, the question though is if the other operators will gain access to such centers [1, p. 199-200].

There are few Polish intermodal road-rail transport providers, but there is remarkable slow increase of container shipments and investments in the sea harbors. Referring to the competition rise with the under 100 kilometers road transport better service standards are expected to be introduced [2, p. 105-106].

The 3rd party countries trade exchange was additionally complicated on Polish side, so the part of the goods deliveries is diverted over other EU-member's borders, causing higher transport costs.

Polish carriers accepted the European technical, social and ecological standards but their competitiveness is still below the level of their West European competitors. The reason is the lack of the reasonable transport policy resulting in the low efficiency of Polish entpreneurs.

The biggest logistic providers stay indifferent to the lack of Polish transport policy, while they accepted the government behaviour as too passive to influence the market situation. Small and medium entpreneurs expect only very precised steps, for example: improved debt collection, elimination of the state railway monopolistic behaviour, clearing the international transport licence grant abuse, improvement of the fuel distribution control [8].

3. Guidelines of the Polish transportation policy

The priority of the Polish transportation policy is the development of lacking transport infrastructure and ensuring the full accessibility of it for all entpreneurs. This will prevent the loss of the competitiveness of Polish logistic companies, after the low-cost advantage exhaustion, which now is the primary advantage on the Common Market, one year after accession. The underdevelopment of Polish transport network affects the inadequate investment location, mostly focusing on the border parts of the country for avoiding the broad contact with the transport network. In the process of the infrastructure improvement the EU standards realization must be fulfilled, in order to keep its durability and full utilization. It also requests the focus on ecological aspect of transport activity and development as well as the promotion of intermodal inland and international transport.

Polish logistics sector competitiveness improvement may be ensured by the stabilization of the transport policy legal instruments, while its present instability limits the long-term strategy building among the entpreneurs. The preparation for the full deregulation of railway and road transport markets, which will take effect after the end of transition periods is also indispensable.

Referring to that, the government's role is to describe the final branch structure of the land-based transport, which will be achieved using the transport policy, and the logistics policy in the near future. The focus on the incentive and extra-legal instruments should also have the positive effect on the transport and logistics, noticeable in Western Europe.

In author's opinion Polish transportation policy, and hopefully soon the logistics policy as well, should include both Japanese and Hungarian experiences, which focus on the infrastructure development. It can be seen, that Hungarian project misses the aspect of new technologies development (information and telecommunication), and so it cannot be abandoned. The Japanese project is more complex, but naturally concentrates on air and sea means of transport and doesn't take into account the economic transormation conditions, which makes it more difficult to introduce in Poland.

Author finds the idea of PKP Cargo's project useful as a very basic start ground for Polish logistics policy, which will ensure competitiveness of Polish carriers for the next decades. Nevertheless it is absolutely necessary to expand it appriopriately and fit it to current conditions of our logistic market.

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ROZWÓJ RYNKU DROGOWYCH PRZEWOZÓW ŁADUNKÓW W ŚWIETLE POLSKIEJ POLITYKI TRANSPORTOWEJ

Streszczenie

1 maja 2004 r. wspólny rynek 25 krajów Unii Europejskiej został otwarty dla polskich przedsiębiorstw branży TSL. Nie jest on jeszcze w pełni zliberalizowany, jednak od tego dnia konkurencja przedsiębiorców TSL uległa dużej intensyfikacji. Całkowita deregulacja wspólnego rynku umożliwi polskim przedsiębiorcom dostęp do największego rynku TSL na świecie, ale oznacza też nasilenie wpływu konkurentów zagranicznych na rynek krajowy.

Rolą państwa jest określenie docelowej struktury transportu, która będzie celem polityki transportowej i logistycznej prowadzonej w przyszłości. Doświadczenia Japonii i Węgier w zakresie wspierania sektora logistycznego są bardzo obiecujące i powinny zostać uwzględnione.

Pomysł rozwoju centrów logistycznych jako bodźca stymulującego rozwój branży TSL może stanowić fundament do stworzenia polskiej polityki logistycznej, która zapewni konkurencyjność polskich przedsiębiorców TSL w przyszłości.

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