

PROSPECT & OPPORTUNITIES IN THE RAILWAY INDUSTRY IN POLAND



Introduction :

Poland has the 3rd largest railway network in the EU and the achievement of the "Railway Investment Program" is currently one of the biggest challenges for the Ministry of Infrastructure. The program includes more than PLN 100 billion (i.e. EUR 23.8 billion) investments for the development of the railway sector until 2023.

→ Poland is a promising market for foreign players in this sector

Poland in figures

Area 312,679 Km2 (2/3 of France)	Population 38.5 millions inhabitants (urbanization rates : 60 %)	Currency Zloty (1€ = 4,29 zł, July 2018)
€ 82.5 Billion European funds for 2014-2020	+ 5 % Growth rates estimated for 2018	€ 13,205 GDP per capita



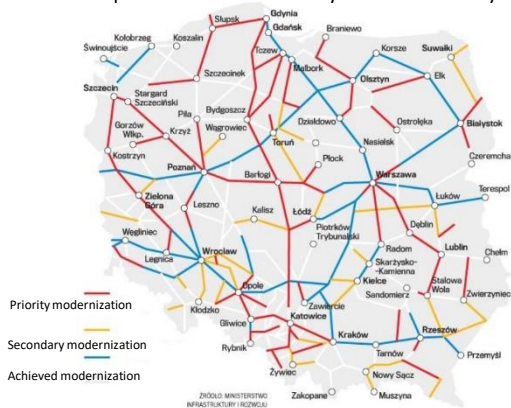
Ongoing and upcoming projects

- ✓ Renovation of 9,000 km of railway
- ✓ Implementation of the ERTMS/GSM-R digit telecommunication system on 14,000 km of railway lines (Thales won the ERTMS/ETCS deployment on 2 lines in 2018)
- ✓ « Rail Baltica » railway line will connect Helsinki to Warsaw via Baltic States by 2030
- ✓ Automation of traffic and installation of optical fiber
- ✓ Construction of a traffic management center in Zamość
- ✓ Purchase of 71 trains by the end of 2022 by Koleje Mazowiecki
- ✓ Extension of the metro line 2 of Warsaw
- ✓ Modernization of tramways, acquisition of rolling stock

Key facts

- ✓ 3rd railway network of the EU
- ✓ 2nd EU player in the transport of goods
- ✓ 303.6 millions passengers transported in 2017 (+3.7%)
- ✓ 19,328 km of railway including 11,868 km electrified
- ✓ **Nearly € 23.8 billion are planned to be spent by 2023**
- Railway Investment Program: € 16 billion
- Rail Network Maintenance Program: € 5.7 billion
- Purchase of rolling stock : € 1.7 billion
- Modernization of train stations: € 357 million

Map of investment in railway infrastructures by 2023



Opportunities for foreign players

The country's desire to modernize and innovate, as well as development programs and European funds create many opportunities throughout the sector:

- ✓ Infrastructures: construction/modernization of railway, railway stations, development of trams and metro networks, construction of tunnels
- ✓ Suppliers of parts for rolling stock: brake system, traction, suspension, cables, control devices isolation, windows, door management systems, interiors...
- ✓ New technologies and advanced technologies, digital traffic management systems
- ✓ Various ongoing and upcoming calls for tenders (purchase and modernization of locomotives and cars, purchase of on-board equipment...)

Main players on the market

Train producers:



Operators (passengers transport):



Operators (goods transport):



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