

POLISH ROAD TRANSPORT POLITICS CHARACTERISTICS

Zdzisław KORDEL

Department of Spatial Economy, University of Gdańsk, Poland
E-mail: zkordel@wp.pl

Summary: The article presents the newest characteristics on Polish road transportation system. It thoroughly describes the condition and structure of Polish transportation companies and their fleet. What is more, it also gives an insight into the qualitative side of this market sector.

Key words: system, Polish roads, transport, market

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Introduction - Polish road transport characteristics

Polish road transportation system has recently been referred to as *Tigers* or *Kings of Europe* with its leading position being emphasized among other European countries. Therefore, it is about time the true condition of the system was revealed. The following presentation thoroughly illustrates the actual state of Polish road transportation system in 2012. Once the lecture of this article is finished, each reader can come to his own conclusions regarding road transport in Poland and decide whether monarchist terms of any kind are appropriate for this system description.

The number of companies and vehicles used in road transport of goods

According to surveys, transportation of cargo by means of road transport in 2011 came up to the total of nearly 1322.24 million tons which is 1.53 times more in relation to the volume of traffic in 2005. The overall volume of freight mainly consists of domestic services and their share in the aforementioned years amounted to approximately 94% and 89%. The drop in the share of national transport is mainly caused by the significant growth of international traffic, especially since Polish EU accession, which resulted in a vast growth from about 6% in 2005 to almost 11% in 2011.

In 2005, the share of Polish road freight transport in the total number of overall volume carried out by the EU members, that is 15 803 million tons, accounted for almost 5% (863.4 million tons) and in 2010 this number increased to 8.18% (1216 million tons) of the total 14 861 million tons which gave it the 6th place among all EU countries, for this type of operation.

The increase in the volume of road freight transport was made possible due to the systematic increase in the number of companies and vehicles, especially since 2004 (Table 1).

Years	Companies (in the possession of a transport service license)		Vehicles (legally authorised)		The average number of vehicles in the company
	State December 31st	Number	Relation to the previous year %	Number	
1996	4537	X	19997	X	4,41
1997	5819	28,26	21470	7,37	3,69
1998	6945	19,35	23275	8,41	3,35
1999	7480	7,7	23883	2,61	3,19
2000	7774	3,93	25705	7,63	3,31
2001	8528	9,7	27854	8,36	3,27
2002	8716	2,2	31927	14,62	3,66
2003	9757	11,94	41119	28,79	4,21
1.05.2004	8980	-7,96	44683	8,67	4,98
2004	11835	31,79	59706	33,62	5,04

2005	13534	14,36	72576	21,56	5,36
2006	16311	20,52	92283	27,15	5,66
2007	20302 ^{a)}	24,47	112174	21,55	5,53
2008	23006 ^{b)}	13,32	126785	13,03	5,51
2009	23605 ^{c)}	2,60	128663	1,48	5,45
2010	24232 ^{d)}	2,66	137502	6,87	5,67
2011	25868 ^{e)}	6,75	147970	7,61	5,72

Tab. 1. The number of companies and vehicles in international road transport in the years 1996 – 2011

In addition, 178 companies did not possess any vehicles^b

In addition, 272 companies did not possess any vehicles^c

In addition, 250 companies did not possess any vehicles^d

In addition, 663 companies did not possess any vehicles^e

In addition, 550 companies did not possess any vehicles

Source: statement based on BOTM data

Considering the aforementioned figures, it is easy to observe that despite the economic slowdown, that first appeared in 2007, the last four years in road transportation sector resulted in a steady increase of both the number of companies and their fleet. In the following years of 2007-2009, that is during the global economic crisis, more than 3 thousand new companies were established as well as over 16 thousand new vehicles were bought in Poland.

More liberal rules and regulations, that had been implemented, led to an easier access to carriers' profession, abolition of customs duties across the whole EU Community, European and transcontinental trade development (globalization with Poland being in the very heart of East and West trade routes) as well as good economic situation throughout the past years and easier way of acquiring means of transportation (credits, loans, lease agreements, possibility to purchase vehicles in other EU countries at bargain prices) are all main factors that have enabled a vast growth of the number of companies and vehicles operating in road transportation services in our country.

However, it is worth to mention the fact that although some progress on consolidation can be expected the supply side of the international transport market is still very fragmented. Throughout the years 2005-2011 small carriers' participation (from 1 to 10 vehicles) in the total number of

companies decreased from 91% to about 89%, whereas the average companies' share (11 to 50 vehicles) increased from 8% to almost 10%, while the biggest companies (51 vehicles) recorded an increase from 0.6% to 1.0%.

In the light of these facts and figures, a conclusion can be made that Polish carriers had been relatively well prepared for a wider expansion of EU community market, as its liberalization was progressing. What is more, not only had they been ready to fulfill the existing market requirements but also to live up to the competitors across the border. This was all made possible through a whole variety of steps that had been cautiously taken well ahead of time such as learning foreign languages, becoming acquainted with the EU laws and regulations being in force, fulfilling its strict ecological requirements regarding fleet and equipment, developing skills and qualifications of personnel and last but not least working hard on keeping existing and gaining new business partners operating in the road transportation sector.

Years	License company [in thous.]	comparison to the previous year %	Copies of licenses vehicles [thous.]	comparison to the previous year %	Average number of vehicles in a company
2004	41,4	X	X	X	X
2005	45,2	9,18	119,3	X	2,64
2006	51,2	13,27	134,1	12,41	2,62
2007	57,0	11,33	155,1	15,66	2,72
2008	61,5	7,89	173,3	11,73	2,82
2009	62,2	1,14	180,5	4,15	2,90
2010	61,2	-1,61	181,2	0,39	2,96
2011	64,4	5,23	196,1	8,22	3,05

Tab. 2. Number of licenses and copies of licenses in domestic road transport in the years 2004-2010

Source: Data from the Ministry of Transport, Construction and Maritime Economy

The number of companies and vehicles in domestic transport (Table 2) presents its significant predominance over the corresponding values of international transport. It had been this way back in 2004 already, when the number of companies in domestic transport amounted to 41.4 thousand which was more than 4 times higher than in international traffic, whereas in 2011 – 2.5 times. The growth of companies in this period in domestic transport sector came up to the total of about 20 thousand, while in the international sector it was more than 14 thousand. On the other hand, the increase in the number of vehicles was 77 thousand in 2004 and more than 88 thousand in 2011, which indicates a bigger growth in the sector of international transport. This difference is affected by the growth in the average number of vehicles possessed that slightly increased resulting in an average of 3 vehicles per company in 2011 in terms of domestic transportation sector and 5.7 vehicle per company in the international market.

It should be noted that the total number of licenses given also includes carriers acting as agents in the process of goods transportation services, so called freight forwarders. This state, however, is fully consistent with the provisions stipulated in the Road Transport Act (Article 4, Paragraph 3b – Journal of Laws of 2005, No. 180, item. 1497), thus making it difficult to separate carriers without vehicles (referred to as pure agents) from licensed carriers actively participating in the actual transportation of goods. In addition, some firms perform both types of activities mentioned at the same time. International road transport licenses (referred to as communal) also entitle its bearers to operate in the national transport (in accordance with the Article 12, Paragraph 2a of the aforementioned Act). This means that the actual number of companies providing domestic services only (often exceeding the borders of Poland) becomes very difficult to determine.

Companies and vehicles according to voivodship

The table below shows an interesting characteristics of Polish road transportation, presenting a combination of freight transport companies operating in international traffic along with the number of vehicles they possess and their exact location.

Table 3 was prepared according to the state as of June 2012.

Voivodship	Company Number	Vehicles share %	Rank	Number	Share %	Rank	%
Poland	25473	100,0	X	146118	%	X	5,7
Lower Silesian	1502	5,90	7	8524	5,83	6	5,7
Kuyavian-Pom.	1014	3,98	12	5784	3,96	12	5,7
Lublin	1602	6,29	6	7753	5,31	7	4,8
Lubusz	1140	4,48	10	7104	4,86	9	6,2
Łódź	1713	6,72	5	8931	6,11	5	5,2
Little Poland	1899	7,45	4	10398	7,12	4	5,5
Masovian	4771	18,73	1	29311	20,06	1	6,1
Opole	545	2,14	16	3661	2,51	15	6,7
Carpathian	1119	4,39	11	6040	4,13	11	5,4
Podlaskie	893	3,51	13	4361	2,98	13	4,9
Pomerania	1375	5,40	8	7550	5,17	8	5,5
Silesia	2557	10,04	3	15185	10,39	3	5,9
Świętokrzyskie	665	2,61	14	3982	2,73	14	6,0
Warmian-Mas.	642	2,52	15	2874	1,97	16	4,5
Greater Poland	2753	10,81	2	17674	12,10	2	6,4
West Pomer.	1283	5,04	9	6986	4,78	10	5,4

Tab. 3. Companies and vehicles in international road transport according to territorial division (by voivodships) – June 2012.
Source: own study based on BOTM database.

The numbers presented in the above table are accompanied by the percentage of voivodeship share in the total number of companies and vehicles in the country. The regions have been listed according to their rank position, with the average number of vehicles per company in the region. The number of companies and vehicles in accordance with their rank position are shown in Figures 1 and 2.

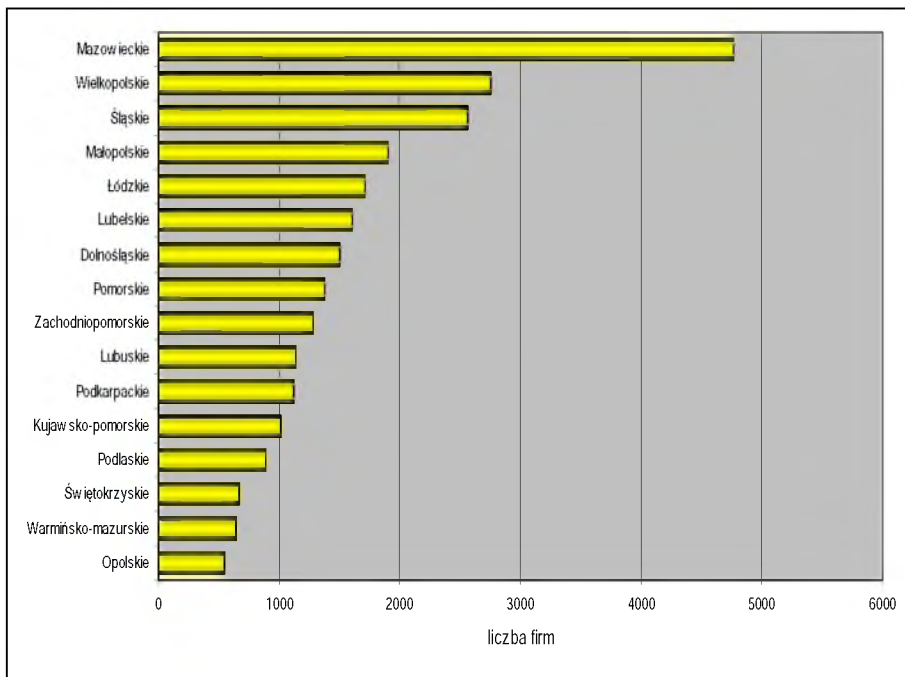


Fig. 1. Number of international transport companies according to voivodship as of June 2012.
Source: Table 3.

The figures above show that voivodships such as: Masovia (Mazowieckie), Greater Poland (Wielkopolskie), Silesia (Śląskie) and Lesser Poland (Dolnośląskie) that take the lead in the rank for biggest number of companies can be also found on similar places in vehicles number rank. The smallest number of companies are located in regions such as: Opole, Warmia and Mazury and Świętokrzyskie, while on the other hand the fewest vehicles are to be found in Warmia and Mazury, Opole and Świętokrzyskie.

Among all the 16 provinces Masovian is an unquestionable leader. Its share in the total number of companies amounts to almost 19% and the number of vehicles - more than 20%. Meanwhile, the shares of such provinces as Opole, Warmia and Mazury and Świętokrzyskie, vary from 2.1% to 2.6% with regards to the companies and from about 2.0% to 2.7% for vehicles.

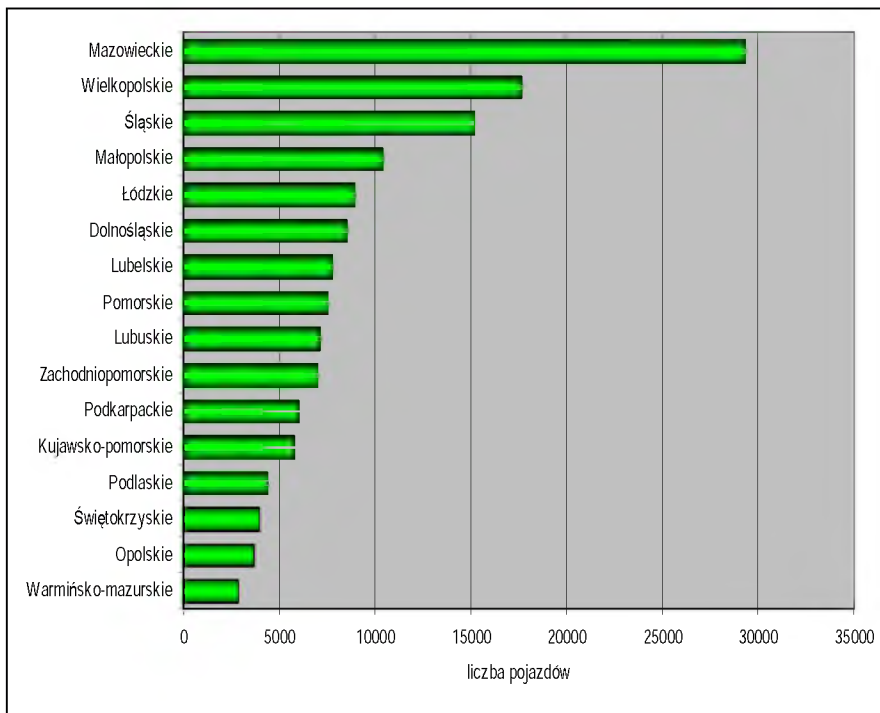


Fig. 2. The number of vehicles in international transport according to voivodeship as of June 2012
Source: Table 3

This very similar spatial distribution of the number of companies and vehicles results from small fluctuations in the average number of vehicles per company in each of the regions in relation to the national average - 5.7. The analysis of the spatial distribution of companies and vehicles on domestic market of road transport carried out in the same period, proved that the voivodeship rank in this case is very similar to the one presenting international traffic. Regions with the highest number of both businesses and vehicles are: Masovia, Silesia, and Greater Poland. The smallest number of companies and vehicles can be found in regions such as Opole, Lubusz and Podlaskie. Masovia is the region with the largest share in the number of companies and vehicles, amounting to almost 17% of the total.

The diversity of regions in terms of their enterprises and vehicles quantity, both in international and domestic transport, are determined by many factors, such as area of

regions, their population, economic situation, degree of urbanization, existing infrastructure or environmental fees and means of transport.

Traffic volume in road transportation system

The increase in the number of transportation companies and their vehicles affects the level and quality of all carriages performed by the carriers in terms of the number of tons (the exact data have been presented in the Table 4, in the form of a detailed division into 2 types of groups, that is international and domestic transport in the years 2005-2011). The presented values are based on the research of Central Statistical Office of Poland (GUS).

In the period of conducted research the overall volume of traffic has increased by 1.5 times. In 2005, international services being one of the volume's components, had its share at a low level of approximately 6%, which had later increased to nearly 11% in 2011. On the other hand, the significance of domestic transport at the very same time was much more higher and ranged from about 94% to 89%.

The rate of growth of international transport was particularly high, that is almost 2.8. Undoubtedly, the statistics show the growing number of companies in this very group, proving them to act as some kind of demand stimulator for international transportation services and also reveals its potential for development.

The analysis of overall cargo transported emphasizes the role of commercial cargo, whose share, according to data given, fluctuated from 92% to about 94% in international transport, and from 62% to 59% in domestic transport. This ratio is at a reasonable level as it would not be acceptable if the share of own-account transport operations in international transport volume accounted for more than a few percent of share only.

When it comes to commercial cargo and its share in domestic transportation services it came up to approximately 60% in 2011, indicating a relatively large share of the economic transport. This phenomenon may be disturbing, especially if we realize that, according to the statistics given, about 40% of this type of traffic does not generate direct revenues for companies.

A different ratio of shares can be observed with regards to the volume of transport services performed by the two groups (that is international transport and domestic transport) where in 2005 the two of them presented the values of 46% and 54%, while in 2011, a growth could be observed, with the values at the level of 57% and 43%. This is due to the significant difference in the average transportation distance between domestic and international transportation, that is 832km in 2011 and 76 km in 2005 respectively.

The shares of the international commercial transportation are defined by a special unit of goods transport measure called the ton-kilometer. The unit helps to estimate the values of shares in relation to the number of tons transported. Therefore, in domestic transport the shares of commercial cargo ranged from 70% to a maximum of 73% and they were higher than the corresponding shares in transportation services. This means a drop in own-account transportation services in the overall transport volume, as the average transportation distance by this mean of transport in 2011 amounted to 52 km and was smaller than in cargo transport with the distance of 92km.

The volume of traffic as well as transport performance of companies employing more than 9 people are given in Table 5. In this case, it is easy to notice that domestic transport represents a relatively high share in the overall cargo transport (in tons), as it oscillates between the 68% to 62%. When it comes to the transportation performance, the situation is different as the leading position is taken by the international services with their shares oscillating at a level of 81%, as of 2010 data.

According to the comparison presented in Tables 4 and 5, transportation activities performed by companies employing over 9 people were approximately 54% of all services performed in international traffic in 2011, while the corresponding values of domestic transport were only 11%. This traffic survey presents a disturbing phenomenon, as it means that only a little bit more than half of the overall international transport of goods was performed by firms classified as big companies. What is more, the domestic transport of goods was performed by companies with over 9 employees.

The number of ton-kilometers in international transport in 2011 was recorded at the level of 65% by the 'bigger' companies, whereas in domestic market the value was 23%, however, in 2005, the numbers were respectively 64% and 16% as a result of higher average transport distances in 2011 for 'bigger' companies (that is international transport - 1015 km and 168 km -domestic transport) compared to the average data based on the research conducted on the representative group (respectively 832 km and 76 km).

The dynamics of international road transport and the volume of tons transferred, according to conducted research, was at the level of 2.70 in the period of 2005-2011, whereas in the companies employing over 9 people the rate was 2.41. What is more, the growth rates for the number of companies in the researched years amounted to about 2.0, while 2.04 for the number of vehicles.

Transportation activity indicators, according to conducted survey were at the level of 2.32, while the very same indicators were at a level of 2.36 with regards to 'bigger' companies with more personnel. The conclusion is that, the total capacity of the vehicles and their distance travelled have increased, as the number of tons and ton-kilometers are higher than an increment in the number of means of transport used.

The characteristics of domestic transport, on the other hand, is as follows: the companies number rate - 1,42, while vehicle rate - 1,64 in 2005 and 2011 respectively. This means that an increase in the amount of vehicles did not trigger a direct increase of tons transported as well as the distance travelled. An interesting contribution can be made to the characteristics of the Polish road transportation system by adding an analysis of the number of companies followed by their transport volumes.

By virtue of the Freedom of Economic Activity Act of 2nd July 2004 (Journal of Laws No. 173, item. 1807, with amendments) the companies were defined in accordance with their size (Art. 104-106), where the main criteria are the number of employed and the annual turnover.

The authors, based on direct interviews and surveys (concerning e.g. the number of employees and drivers),

pursuant to the aforementioned Act made a suggestion that micro companies employing up to 10 people should be represented with 4 vehicles, while carriers with over 50 employees should be fitted with 30 vehicles. This brings us to a conclusion that Table 5 presents transport services of the companies having more than 4 vehicles.

Based on data obtained from the BOTM, a conclusion can be made that, in 2005 almost 66.12% of overall firms accounted for international companies, that according to definition belong to the group of micro companies, possessing no more than 4 vehicles. Therefore, in 2005 about 34% of the companies (in comparison to 66% of micro enterprises) are those that have more than 4 vehicles (that is, more than 9 employees) and performed the transportation services of 31.70 million tons (Table 5). Other transportation activity of 52.55 million tons (according to a sample survey), or about 21 million tons were carried out by micro companies.

In 2011, companies with up to 4 vehicles in international traffic accounted for almost 69% of all enterprises and transported 65.21 million tons (the difference in total volume of international traffic, according to survey carried out on a representative group, being 141.67 million tons, that is reduced by 76.46 million tons in enterprises employing above 9 people). Therefore, 'bigger' enterprises, that is with over 4 vehicles and 9 employees accounted for about 31% of total and performed transportation services of 76.46 million tons.

Unfortunately, such a system is not too beneficial, especially that the share of international transport companies (classified as "micro") does not seem to get reduced, but even increases, however, in the same time the volume of goods transported has increased.

There are no data on the number of companies and vehicles in the domestic transport detailed enough to have them grouped according to the accepted categories. You can, however, with the help of the research conducted and based on the authors' knowledge, come to a conclusion that the share of micro companies in this case was even higher than in international transport. The average number of vehicles in domestic transport companies amounted to 3 in 2011.

Description		Years		
		2005	2010	2011
Transport in mln tons				
Total		863,4	1216,08	1322,24
	dynamics 2005 r =1,00	1,00	1,41	1,53
of which:				
International transport		52,55	143,57	141,67
	share in % of total	6,09	11,81	10,71
	dynamics 2005 r =1,00	1,00	2,73	2,70
of which:				
commercial transport		48,40	134,59	133,79
	share in international transport %	92,10	93,75	94,44
	dynamics 2005 r =1,00	1,00	2,78	2,76
domestic transport		810,85	1072,51	1180,57
	share in % Total	93,91	88,19	89,29
	dynamics 2005 r =1,00	1,00	1,32	1,46
of which:				
commercial transport		513,02	632,78	702,49
	share in domestic transport %	63,27	59,00	59,50
	dynamics 2005 r =1,00	1,00	1,23	1,37
Transportation activity in mld ton-km				
Total:		111,83	202,31	207,65
	dynamics 2005 r =1,00	1,00	1,81	1,86
of which:				
international transport		50,89	120,09	117,92
	share in % of total	45,51	59,36	56,79
	dynamics 2005 r =1,00	1,00	2,36	2,32
of which:				
commercial transport		48,19	114,68	113,46
	share in international transport %	94,69	95,50	96,22
	dynamics 2005 r =1,00	1,00	2,38	2,35
domestic transport		60,94	82,22	89,73
	share in % of total	54,49	40,64	43,21
	dynamics 2005 r =1,00	1,00	1,35	1,47
of which:				
commercial transport		44,56	58,29	64,80
	share in domestic transport %	73,12	70,90	72,22

		dynamics 2005 r =1,00	1,00	1,31	1,45
Average transport distance in km					
Total			130	166	157
international transport			968	836	832
domestic transport			75	77	76

Tab. 4 Transport of goods by road in total, according to international and domestic survey

Source: own calculations based on "Transport - results of operations" in 2005-2011, CSO, Warsaw.

Description			Years		
			2005	2010	2011
Transport in mln tons					
Total			101,99	173,48	202,37
		dynamics 2005 r =1,00	1,00	1,70	1,98
of which:					
international transport			31,70	71,22	76,46
		share in % of total	31,08	41,05	37,78
		dynamics 2005 r =1,00	1,00	2,25	2,41
domestic transport			70,29	102,26	125,91
		share in % of total	68,92	58,95	62,22
		dynamics 2005 r =1,00	1,00	1,45	1,79
Transportation activity in mld ton-km					
			42,75	93,92	98,71
		dynamics 2005 r =1,00	1,00	2,20	2,31
of which:					
international transport			32,82	75,92	77,59
		share in % of Total	76,77	80,83	78,60
		dynamics 2005 r =1,00	1,00	2,31	2,36
domestic transport			9,93	18,00	21,12
		share in % of Total	23,23	19,17	21,40
		dynamics 2005 r =1,00	1,00	1,81	2,13
Average transport distance in km					
Total			419	541	488
international transport			1035	1066	1015
domestic transport			141	176	168

Tab. 5. Transport of goods by road in total, international and domestic companies employing more than 9 people

Source: own calculations based on "Transport - results of operations" in 2005-2011, CSO, Warsaw.

Polish road transport in the EU Community

Polish road transportation system is perceived mostly by its rank on the EU market. Table 6 presents transport volumes in the years 1995 to 2010 for Polish, five selected EU countries and the aggregated data for the "old" and "new" EU members. Graphical illustration is given in Figure 3.

According to the statement of selectively chosen number of ton-kilometers performed in total of transportation services (Table 6) in the years 1995 to 2010, the share of this type of transport activity is very diverse. For example, the lowest is in Germany, and the highest in Spain.

Country	Years			
	1995	2000	2005	2010
France billion tkm	178,20	204,00	205,30	182,20
dynamics 1995 = 1,00	1,00	1,14	1,15	1,02
share in % of land transport**)	76,50	76,00	80,50	82,20
Spain billion tkm	101,60	148,70	233,20	210,10
dynamics 1995 = 1,00	1,00	1,46	2,30	2,07
share in % of land transport	90,30	92,80	95,20	95,80
Germany billion tkm	237,80	280,70	310,10	313,10
dynamics 1995 = 1,00	1,00	1,18	1,30	1,32
share in % of land transport	63,90	66,10	66,00	64,80
Great Britain billion tkm	161,50	165,60	164,50	146,70
dynamics 1995 = 1,00	1,00	1,03	1,02	0,91
share in % of land transport	92,30	90,00	88,00	88,75
Italy billion tkm	174,40	184,70	211,80	175,70
dynamics 1995 = 1,00	1,00	1,06	1,21	1,01
share in % of land transport	88,20	89,00	90,30	90,40
Poland billion tkm	51,20	75,00	111,80	202,31
dynamics 2000 = 1,00	1,00	1,46	2,18	3,95
share in % of land transport	42,60	56,90	69,00	80,58
UE - 25 ***) billion tkm	1287,00	1495,40	1763,30	1745,61
dynamics 2000 = 1,00	1,00	1,16	1,37	1,36
share in % of land transport	72,20	74,50	76,90	76,46
UE - 15 billion tkm	1127,50	1318,40	1476,10	1333,40
dynamics 1995 = 1,00	1,00	1,17	1,31	1,18

share in % of land transport	76,60	77,60	79,30	77,92
UE - 10 (***) billion tkm	149,00	176,97	287,20	412,21
dynamics 2000 = 1,00	1,00	1,19	1,93	2,77
share in % of land transport	44,00	57,40	66,60	72,08

Tab. 6. Transportation activity in road transport of cargo* in selected EU countries in the years 1995 - 2010*) According to a sample survey of 2004

***) Land transport includes: transport by rail, road and inland waterway transport

*) Without Cyprus and Malta

Source: own calculations based on DG TREN "Energy & Transport in Figures" - 2006 and Eurostat 2011

Polish transport recorded the highest growth rate of almost 4.0. The increase in transport activity of EU-25, however, was caused by the growth of overall ratio of ton-kilometers in the group of 'new' UE-10 countries, as compared to 'the old' UE-15.

In the "old EU" group the share of international transport in 2010 had decreased compared to 2005, except for Spain, where the share had increased slightly. The highest growth rate was recorded in Spain, where international transport increased by almost three times in 2010 in relation to 1995.

On the other hand, the countries of so called "new Union", that is the EU - 10 presented a significant share of international transport in the overall transport by road, that is 66% of share and 3 times higher growth in the past ten years. These high values of international transport of EU-10 countries affected the rest of EU members resulting in an increment of the same indicator, by an increase to 33% in 2010, compared to 23% recorded by the EU - 15 in 2010, which shows a decrease compared to the previous years of the researched period.

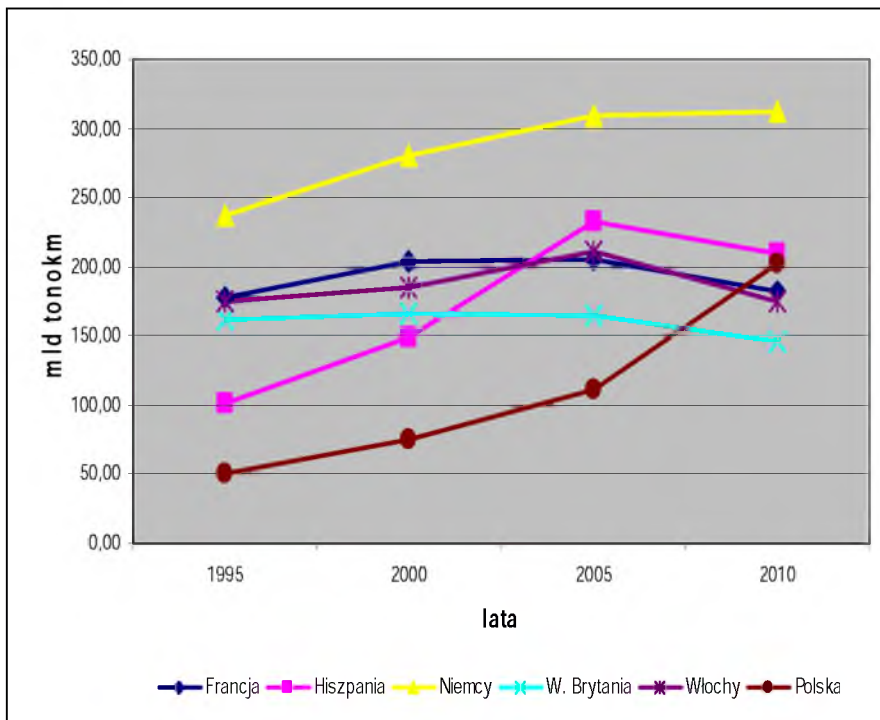


Fig. 3 Transportation activity in road transport of cargo*in selected EU countries in the years 1995 – 2010

Poland, against the background of presented countries, occupies the leading position due to the volume of transportation activity it performs, that is 120 billion tkm in 2010, which accounted for almost 21% of overall transport across the EU and the dynamics established in 2000, whose rates were at a level of about 4.5. During the researched period, the share of ton-kilometers performed in international traffic oscillated at the level of more than 59% of overall transport by road, that is relatively more compared to the countries mentioned.

Table 7, below, summarizes the overall volume of transportation activity performed in international transport, presented in the same manner as data of the ton-kilometers above.

Country	Years			
	1995	2000	2005	2010
France billion tkm	42,90	40,80	28,00	17,90
dynamics 1995 = 1,00	1,00	0,95	0,65	0,42
share in % of total road transport	24,00	20,00	13,60	9,84
Spain billion tkm	22,90	41,80	66,80	63,90
dynamics 1995 = 1,00	1,00	1,83	2,92	2,79
share in % of total road transport	22,50	14,90	28,60	30,43
Germany billion tkm	36,50	54,20	72,50	60,60
dynamics 1995 = 1,00	1,00	1,48	1,99	1,66
share in % of total road transport	15,30	19,30	23,40	19,36
Great Britain billion tkm	14,80	15,30	10,10	8,90
dynamics 1995 = 1,00	1,00	1,03	0,68	0,60
share in % of total road transport	9,20	9,20	6,30	6,07
Italy billion tkm	24,10	26,40	40,20	26,50
dynamics 1995 = 1,00	1,00	1,10	1,67	1,10
share in % of total road transport	13,80	14,30	19,00	15,07
Poland billion tkm	•	27,00	50,90	120,09
dynamics 2000 = 1,00	•	1,00	1,89	4,45
share in % of total road transport	•	36,00	45,50	59,36
UE - 25 **) billion tkm	•	429,90	564,70	574,09
dynamics 2000 = 1,00	•	1,00	1,31	1,34
share in % of total road transport	•	28,10	30,50	32,89
UE - 15 billion tkm	268,30	339,50	381,60	302,10
dynamics 1995 = 1,00	1,00	1,27	1,42	1,13
share in % of total road transport	23,50	25,50	26,00	22,66
UE - 10 **) billion tkm	•	90,37	183,10	271,99
dynamics 2000 = 1,00	•	1,00	2,03	3,01
share in % of total road transport	•	48,90	57,70	65,98

Tab. 7. Transportation activity in the international traffic of commercial cargo in selected EU countries in the years 1995 - 2010

*) According to a sample survey of 2004

**) Excluding Cyprus and Malta

Source: own calculations based on DG TREN "Energy & Transport in Figures" - 2006 and 2006 and Eurostat Eurostat 2011.

In a special report issued by Eurostat at the end of 2010, being a detailed summary of the passing year, Polish transport had been referred to as developing and therefore leaving a positive impression and perspectives for further growth and advancement in the future. This has been achieved thanks to the trend of gradually increasing transportation activity along with significant growth rate of international transport of Poland.

Furthermore, throughout the years Poland has finally earned its position in the group of road transportation leaders of EU countries and started to be perceived, along with a few countries only, as the one that efficiently opposed economic crisis. When it comes to numbers and figures, it is worth mentioning that Poland has been in the top countries with regards to the volume of ton-kilometers since 2005 already. Last year, Poland was found on the second place, right behind Germany (with 207.65 million tkm Poland, Germany 323.83).

However, those who are professionally involved in transportation sector as well as the experts on transportation services are trying to make a point that excessive enthusiasm is not an option. They also warn against taking this favorable for Poland trend for granted, since nothing is ever certain. It shall not be forgotten that Poland gained its strong position due to its strong competitive skills and determination to succeed. However, nowadays, even this advantage of Polish transport may be subject to change. Polish market, as well as the others, is unsafe and will definitely need to defend its position against competition from the East. It is expected that eastern financial and infrastructural background may start to play more and more important role in the transportation system of the future.

Conclusion

In summary, the road transportation market in Poland has been subject to significant changes both in terms of

quality and quantity over the recent years. What is more, this trend is expressed in the number of companies operating in this market as well as their financial results. According to statistics shown in one of Polish national daily newspapers Rzeczpospolita: there is a reason to believe the upcoming years will allow the current condition of Polish transportation system to be maintained, but it will particularly apply to companies with their fleet over 50 vehicles as well as large logistics operators.

Furthermore, the authors' observation brings us to a conclusion that, although at a very small pace, the market is heading toward the process of concentration. More often, we can become witnesses of the phenomenon of mutual collaboration between small companies and big enterprises in terms of vehicles and overall activities. Last but not least, it must be admitted that over the years Polish road transport has increased its value. We have become a strong and equal partner among other countries that can be found on the EU transportation market. However, it should be noted that the position of Polish carriers, known as the "kings of Europe" should not be treated as a fixed dogma. Just the opposite. Being the king of Europe requires a lot of hard work and engagement. Not only is it essential to pay attention to the qualitative side of transportation system but above all the economic efficiency. Therefore, Poland should be more flexible and prepared for any changes in the condition of EU economy that may occur and thus ready for any structural changes that may be needed, even if they require significant expenses.