

Market consultation with RU-s

Brief summary

30.04.2026

What is included in the presentation?

»»» This document outlines the key information regarding the Horizontal Timetable (HRJ) consultation process with potential operators and summarises the main conclusions

»»» Content:

- 1** Introduction
- 2** The consultation process
- 3** Conclusions – the summary
- 4** Conclusions – the PSO services
- 5** Conclusions – the commercial services
- 6** Conclusions – both for the PSO and commercial services

Disclaimers

- ▶▶▶ This presentation is not the consultation report, but a summary of it.
- ▶▶▶ The publicly available presentation and report do not contain any information that could be sensitive from the perspective of any RU-s.
- ▶▶▶ The conclusions set out in the materials reflect the views of the stakeholders. The HRJ team has not included any of its own comments or assessments regarding these views.
- ▶▶▶ The full version of the report (in Polish) can be found [here](#).
- ▶▶▶ The market consultations are part of wider consultation process of Horizontal Timetable (HRJ Project). A summary of the other parts of the process will be published as separate documents.

Introduction

Further information can be found in the executive summary (Chapter 1) and the introduction (Chapter 3) of the full version of the Report



[Link to the Report \(PL\)](#)



Introduction

We are preparing HRJ to enable...

...rail travel more passenger-friendly. A clear network of connections, a regular timetable, convenient transfers and coherence over the years are the key features that should characterise the transport services.

HRJ is not only...

...an analysis of transport services provided under PSOs and commercial transport services.

» HRJ also involves regulatory and strategic planning, as timetabling and transport policy are closely related.

That is why, as part of the HRJ consultation, we also asked the market about these issues.

Find out more about HRJ: www.hrj.gov.pl

RAILWAY SERVICES:

economic analyses,
timetabling,
rolling stock demand,
feeder bus connections,
coordination with regional services,
AeroExpress services

REGULATORY AND STRATEGY ISSUES:

capacity management,
market regulations and conditions,
framework agreements,
fare structure, railway infrastructure

Introduction

The liberalisation of the rail market should not be an end in itself, but rather a means of improving the services offered to passengers and the functioning of the rail system. Simply launching tenders or issuing open-access decisions will not ensure the entry into the market of new operators capable of providing services. Of decisive importance is the proper shaping of market operating conditions, as well as their stability and predictability, for which the state is responsible both in the area of subsidised and commercial transport.

The consultations conducted as part of the HRJ Project are intended to help develop recommendations regarding the practical implementation of transport market liberalisation. They should also result in the identification of tools for the public sector that will enable the creation of market conditions that are genuinely open to competition, conducive to growth in transport services, and at the same time ensure the protection of passengers' interests and the market stability.

The feedback gathered from 16 entities significantly supports the updating of the HRJ Project's objectives, but does not cover the entire issue. Further discussions with the market are required, in particular, regarding the organisation of transport services following the launch of the HS "Y"-line: Warsaw – Central Airport – Łódź – Wrocław / Poznań, where commercial traffic is expected to predominate over traffic resulting from the performance of tasks specified in public service contracts.

This presentation is not a full report on the consultation, but a summary of it.

You can view the full version of the Report [here](#). (PL)

Content of the Report:

1. Executive summary
2. Introduction
3. Consultation process
4. Conclusions from the consultation
 - a. The PSO services
 - b. The Commercial services
5. Appendix 1 – summary of the questionnaires
6. Appendix 2 – summary of bilateral meetings
7. Appendices [3](#) and [4](#) – presentation from the meeting (PL/EN)
8. Appendices [5](#) and [6](#) – questionnaire templates (PL/EN)



Konsultacje Horyzontalnego Rozkładu Jazdy z potencjalnymi przewoźnikami i operatorami

Nazwa:	<i>Raport z konsultacji HRJ z potencjalnymi przewoźnikami i operatorami</i>
Rewizja:	1.0
Data:	30.04.2026

The consultation process

A detailed description of the process can be found
in Chapter 4 of the full version of the Report



[Link to the Report \(PL\)](#)

Description of the consultation process

The HRJ process included four separate parts for different stakeholder groups. The entire process ran from July 2024 to April 2026. The completion of all parts of consultations enabled the preparation of a revised proposal of the transport services.

VOIVODESHIPS MARSHALS

METROPOLITAN TRANSPORT AUTHORITIES

- Long-distance services
- Coordination of long-distance and regional services
- Connections with regional trains
- Feeder services to long-distance trains

POTENTIAL FUTURE RAILWAY UNDERTAKINGS PRESENT ON THE MARKET

- Market organisation rules
- Predefined routes
- Terms and conditions for tenders and PSC contracts

NEIGHBOURING COUNTRIES

- Level of transport services
- Coordination of timetables at the border

SOCIETY AND NGO-s

- Train services and timetable
- Conditions regarding train stops

- August 2024: invitation to participate
- August 2024–January 2025: preparation of material by stakeholders regarding plans for the development of transport services,
- April–October 2025: 16 workshop meetings,
- 21 January 2026: wrap-up meeting with the organisers,
- February–April 2026: 31 meetings to agree on border voivodeships services

- July 2024: invitation to participate
- 31 August 2024: registration deadline
- 3–4 October 2024: general meetings
- Q4 2024: completion of the survey by stakeholders
- January–February 2025: bilateral meetings

Depending on the country, consultations took place at the level of ministries, infrastructure managers, transport operators or organisations responsible for analysing timetables and capacity.

- August 2024: publication of the HRJ2035 proposal on the Project website (www.hrj.gov.pl)
- 11 September 2024 – 13 October 2024: consultation period

Consultations with Railway Undertakings (RU-s)



Identifying market opportunities and obstacles
Consulting on the concepts proposed in the HRJ



PSO and commercial services



Registration of organisations: until 31 August 2024
53 individual invitations -> **23** participants



1 general meeting (PL – 3.10.2024, EN – 4.10.2024)
16 survey responses (7–22.10.2024)
15 bilateral meetings (8.01.2025 – 8.02.2025)



More than **32 hours of meetings**



Almost **50 welcomed guests**

Consultations with Railway Undertakings (RU-s)



SENDING OUT INVITATIONS

53 invitations

16.07.2024

date of invitation

31.08.2024

end of
registration



APPLICATIONS

23 answers



KICK-OFF MEETING

in Polish

03.10.2024

in English

04.10.2024



SURVEY RESPONSES

16 returned
questionnaires

07-22.10.2024



BILATERAL MEETINGS

15 meetings

08.01.-8.02.2025

Invitations to consultations – structure of entities

Invitations were sent to **53 entities (51 RU-s and 2 industry organisations)**

21 entities responded to the invitation, and **2 additional entities** (1 RU and 1 rolling stock pool) came forward to take part in the consultation after learning about it through other channels:

České dráhy as.	Železničná spoločnosť Slovensko, a.s.	Flytoget AS	Ouigo France	European Sleeper	Łódzka Kolej Aglomeracyjna Sp. z o.o.
RegioJet a.s.	LTG Link	Deutsche Bahn AG	Kevin Speed	GoVolta	PKP SKM w Trójmieście Sp. z o.o.
Leo Express Global a.s.	VR Group	FlixTrain GmbH	NMBS	Arriva plc	BLS AG
ÖBB-Personenverkehr AG	MTR Nordic AB	DSB	Eurostar	The GoAhead Group Ltd.	Renfe-Operadora E.P.E
WESTbahn Management GmbH	SJ AB	Transdev	N.V. Nederlandse Spoorwegen	Mobico Group	Ouigo España
MÁV START Zrt.	Vygruppen AS	SNCF Voyageurs	Qbuzz BV	SBB	Intermodalidad de Levante SA
SKPL Cargo Sp. z o.o.	Comboios de Portugal	Koleje Mazowieckie Sp. z o.o.	Arenaways	Arriva RP Sp. z o.o.	Angel Trains (rolling stock pool)
Koleje Dolnośląskie S.A.	Trenitalia SpA	Koleje Śląskie Sp. z o.o.	PKP Intercity S.A.	First Group Plc	Allrail (industry association)
Koleje Małopolskie Sp. z o.o.	Italo SpA	Koleje Wielkopolskie Sp. z o.o.	Polregio Sp. z o.o.	Olavion Sp. z o. o.	Forum Train Europe (industry association)

The number of 23 participants in the consultation process should be regarded as satisfactory, as it includes the vast majority of transport operators from Poland and Central-Eastern Europe. A major association representing independent transport operators also took part in the consultation.

Kick-off meetings and the survey

21 organisations took part in **kick-off meetings** (two meetings with the same agenda – one in Polish and one in English). These meetings covered the consultation process and the objectives of the HRJ Project. Participants were also informed that a **survey** had been sent out as the first stage of the consultation. Responses were received from 16 entities.

The questionnaire consisted of 21 questions grouped into **3 thematic sections**:

General questions	Commercial railway services	PSO services
<p>Space for stakeholders to raise additional issues not covered by the other questions and to submit comments</p>	<p>Predefined routes and open access</p> <p>Distinction between public service and commercial transport</p> <p>Legal and organisational barriers to market entry</p> <p>Resolving conflicts in the capacity allocation process</p> <p>Framework agreement with the IM</p> <p>Rolling stock pool</p> <p><i>(Postoje synergiczne)</i> Synergic stops</p>	<p>Contract duration</p> <p>Size of tender packages</p> <p>Access to the rolling stock</p> <p>Time between the tender and the launch of services</p> <p>Rolling stock requirements</p>

- Detailed analysis of the responses provided in the survey can be found in the full version of the Report (Appendix 1) -> [Link to the Report](#)
- The presentations from the meetings, in both language versions, are included as Appendices 3 and 4 to the Report -> [Link to the Appendix 3.](#) | [Link to the Appendix 4.](#)



The structure of entities at the survey phase

16 entities:

15 Railway Undertakings, **1** Association

15 RU-s:

6 from PL, **7** from neighbouring countries, **2** from other EU countries

6 long-distance RU-s, **4** regional, **5** with both L-D and regional traffic

8 incumbents, **7** private operators *)

*) taking into account activities in the country of origin

The process of bilateral meetings

Of the 16 stakeholders who completed the questionnaires, **15 indicated their interest in participating in bilateral meetings**. The aim of these meetings was **to discuss the responses provided**, as well as **to discuss issues beyond the scope of the questionnaire** that the stakeholders had identified as important.

The meetings, held either in person or online, lasted a total of over 32 hours and were attended by over 50 guests.

THE PART DEVOTED TO DISCUSSING THE TOPICS COVERED IN THE SURVEY



Answers to the questions in the survey



Discussion of the responses provided in the survey

THE OPEN PART OF THE BILATERAL MEETING

- Expectations and the role of stakeholder in the project
- Discussion of topics not included in survey
- Identifying additional topics for further consideration
- Schedule
- ▼ Basic assumptions of HRJ Project

Conclusions: summary

A detailed discussion of the stakeholders' proposals can be found in Chapter 5 of the full version of the Report



[Link to the Report \(PL\)](#)

Interest in providing railway services

Long-distance market in Poland from 2030

Number of RU-s interested in national railway market

10

Railway Undertakings

declared interest in
long-distance PSO services

7

Railway Undertakings

declared interest in
long-distance commercial services



Key findings – the PSO services

10 operators have expressed an interest in providing long-distance transport services under the public service obligation (PSO).

The key proposals are:

1. The upper limit for tender packages should be 5 million train-kilometres per year,
2. It is reasonable to organise pilot tenders to gain experience or assess commercial potential,
3. To ensure continuous market mobilisation, tenders should be announced gradually, with varying durations for PSC contracts,
4. The target duration of PSC contracts should be between 10 and 15 years,
5. The mobilisation period between the signing of the contract and the start of transport operations should allow for the preparation of operations, in particular the acquisition of new rolling stock; four years was most frequently cited,
6. It is necessary to ensure the predictability of market development by drawing up a roadmap for tender procedures,
7. Access to historical transport performance data must be provided in order to calculate bids accurately, particularly in net models,
8. It is expected that non-discriminatory access to unsubsidised rolling stock financed from EU funds will be ensured (the issue of so-called ‘overcompensation’),
9. It is expected that effective non-discriminatory access to service facilities will be ensured.

Key findings – the commercial services

7 entities have expressed an interest in operating commercial long-distance transport services.

The key proposals are:

1. The expectation that market conditions will be shaped in a way that enables the organic growth of rail operators,
2. The expectation that access to transport performance data will be ensured, which is particularly important for entities not yet present in Poland or those with a limited presence,
3. The expectation of continuing discussions on predefined routes in order to develop rational rules for this mechanism that are understandable to all market participants,
4. A mixed reception of the CPK rolling stock pool concept: some entities expressed interest, whilst for others the rolling stock pool does not fit into their business model,
5. A positive assessment of framework agreements for access to railway infrastructure as an instrument facilitating the attainment of the expected capacity,
6. A negative assessment of the existing open-access procedure, which boils down to pointing out its excessive over-regulation, and furthermore the decision's duration being too short at only 5 years,
7. Indication of the possibility of applying hybrid solutions, combining elements of public service and commercial transport.

Conclusions: the PSO services

A detailed discussion of the stakeholders' proposals can be found in Chapter 5 of the full version of the Report



[Link to the Report \(PL\)](#)

What is the expected size of the tender package for long-distance services?

Upper limit: **approx. 5 million** train-km/year

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp.	---	---	3	3	--	3-5	--	5	<10	---	3-5	---	---	---	---	---

- 6 responses
- One of the most frequently raised requests during meetings with stakeholders was for the size of individual tender packages to be relatively limited in terms of train-km.
- It should be noted that operators split into two groups, one of which set an upper limit of 5 million train-kilometres per year, and the other at 10 million train-kilometres per year. In practice, this means that a single such package could include 2–3 long-distance services.
- One operator pointed out that it is undesirable to announce tenders that are too small (less than 5 million train-kilometres per year), as these would in turn exclude potential participation by operators from outside the Polish market due to the costs involved in entering the market.
- Another, however, indicated that potential participation depends on the ability to achieve an annual turnover of at least EUR 200 million.

What is the expected duration of the PSC contract?

Initially: **8-10 years**

Ultimately in a mature market: **10-15 years**

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp.	---	>5	10-15	---	15	15	10	---	15	10	15	>10	---	>5	>8	---

- 11 responses
- Four stakeholders indicated that PSO contracts, following the transition phase, should have a duration of approximately 15 years. A further four indicated that they should have a minimum duration of 10 years.

Gradual publication of tenders, varying durations of PSC contracts

- Stakeholders agreed that tenders should be announced gradually to avoid a situation where too large a proportion of maintenance work is released onto the market at once, which would limit the market’s capacity to absorb it or the scope for smaller operators to systematically build up their transport capacity.
- Stakeholders also highlighted the need to spread tenders over time, which would ensure continuous market activity rather than a focus solely on the period leading up to the expiry of contracts.
- Example chart showing the varying durations of PSC contracts:**



How long is the mobilisation period expected to be, between the signing of the PSC contract and the launch of railway services?

If new rolling stock needs
to be purchased : **4-5 years**



With existing rolling stock: **2 years**



Rolling stock
must be purchased



Aquired or existing
rolling stock

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	---	0,5	3	1-2	4	4	6-8	---	3-5	1-1,5	4-5	1-2	>3	---	2	---
	---	---	1,5-2	---	---	2	---	0,5	1,5-2	0,5-1	1,5	---	2	---	1	---

- Stakeholders expressed differing views. **The most common recommendation was a period of approx. 4 years** where the operator is required to provide the rolling stock, with the possibility of reducing this by approximately 2 years if the rolling stock is provided by the PTA.
- On the other hand, there were also views that 1.5–2 years was a sufficient period, even where the operator was required to provide the rolling stock.

What about the new rolling stock acquired not with the operator's own funds, but with EU grants?

- Five stakeholders highlighted the need for **a discussion regarding rolling stock acquired with the support of EU grants**, which, if not used for PSO services and where the benefits to its owner remain unaccounted for, would constitute unlawful state aid (**the issue of so-called overcompensation**).

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	----	----	----	----	!	!	----	!	!	----	----	----	----	----	!	----

- Furthermore, stakeholders pointed out that such a situation could also lead to **a further competitive advantage for the incumbent**. Conversely, making such rolling stock available in a manner that does not discriminate against other bidders **could support market entry for a larger number of operators**.

Rolling stock pool – the PSO services

The stakeholders who spoke on the subject of the rolling stock pool were largely in agreement regarding **its positive role in the operation of PSO services**

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	---	+	+	---	-	+	---	+	+	---	+	+	+	---	+/-	---



- 8 stakeholders responded positively to the Organiser’s proposal to provide rolling stock.
- None of them viewed the proposal critically; however, as many as nine either did not respond at all or gave an inconclusive response.

What will an open market look like in practice?

Gradual market opening. Predictability of the PSC contract market

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	-	-	+	-	+	+	+	+	+	+	+	-	-	+	-	-



A stakeholder with an interest in the subject



No discussion of this aspect during the consultation

- Stakeholders have indicated that it would be desirable to introduce a mechanism ensuring market predictability for potential operators in the PSO transport sector. This would facilitate their business planning and risk management.
- In this context, the optimal solution identified was to define a roadmap for launching tenders for the operation of specific long-distance services (tendered packages), enabling rail operators to develop stable business strategies.
- Furthermore, this would support the organic development of operators, particularly in terms of preparing rolling stock, human resources and technical facilities.

What will an open market look like in practice?

Are any pilot tenders for PSO rail passenger services being planned?

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	-	-	+	-	+	+	+	+	+	+	+	-	-	+	-	-



A stakeholder with an interest in the subject



No discussion of this aspect during the consultation

- One of the suggested solutions, which had already been proposed to a limited extent during the survey phase and subsequently to a much greater extent during bilateral meetings, was to launch pilot tenders for long-distance services with a low volume of operating performance (train-km), which would allow experience to be gained in this area.
- It was also pointed out that test tenders could cover railway services with uncertain commercial viability, so that, should such viability be confirmed, the given service could be separated from the PSO services segment.

Conclusions: the commercial services

A detailed discussion of the stakeholders' proposals can be found in Chapter 5 of the full version of the Report



[Link to the Report \(PL\)](#)



Ministerstwo
Infrastruktury



PORT
POLSKA



PKP POLSKIE LINIE KOLEJOWE S.A.

Zarządca narodowej sieci linii kolejowych



CENTRUM UNIJNYCH
PROJEKTÓW TRANSPORTOWYCH




URZĄD
TRANSPORTU
KOLEJOWEGO


Synergic stops and mixed, commercial-PSO services

In the case of increasing number of commercial services, the concept of synergic stops provides for the possibility of subsidising commercial stops at specific locations, with a aim of maintaining a number of services deemed adequate by the Ministry, and reducing the transport intensity of the transport system.


This proposal was welcomed by 7 stakeholders.

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	+	+/-	+	---	+/-	+/-	+/-	+	+	+	+	---	+	---	---	+/-

 A clearly positive assessment

 A clearly negative assessment

 An inconclusive assessment

 No review



Some stakeholders also highlighted the possibility of using hybrid solutions that combine the characteristics of commercial services and PSOs. This could involve establishing services that would operate commercially on certain sections and be covered by a PSC agreement on others. For services that are unlikely to be profitable throughout the entire year or week, state support could also be provided exclusively during periods when demand is low.

Terms and conditions of framework agreements – recommendations from stakeholders



The framework agreement concluded between the railway undertaking and the infrastructure manager concerns the allocation of capacity. It is an instrument designed to ensure the stability of railway undertakings' operations on the rail network.

Stakeholders generally welcomed the idea of concluding framework agreements for access to railway infrastructure as a tool to facilitate the securing of the required capacity in the long term. However, stakeholders' views on the significance of such agreements when applying for funding to purchase rolling stock proved to be divided. The consultation revealed that entities planning to develop commercial transport services are more interested in the framework agreement mechanism.

How far in advance (in years) should the framework agreement be concluded?

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	4-5	0,5	3	---	4	>4	6-8	>4	4-5	2-3	5	---	---	10	---	10
	---	0,5	1,5	---	---	1	2	<4	3-4	1-1,5	2-3	---	---	5	---	---

Duration of the framework agreement (in years)

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	>5	---	---	---	---	>5	>10	10	15	10-15	15	---	---	---	---	---
	---	---	---	---	---	---	---	5	---	5-10	5	---	---	---	---	---



Rolling stock must be purchased







Acquired or existing rolling stock

The commercial services – rolling stock pool

Stakeholders who spoke on the subject of the rolling stock pool and its potential role in launching future commercial services were divided.

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	-	+	+	---	+/-	+	---	+/-	-	---	-	---	---	+	---	-


	A clearly positive assessment		A clearly negative assessment		An inconclusive assessment		No review
--	-------------------------------	---	-------------------------------	---	----------------------------	---	-----------


- During the consultation, stakeholders were informed about a project to establish a rolling stock pool by CPK, which is being carried out in parallel with the HRJ project. This information aroused considerable interest, but was assessed as unequivocally positive by four entities.
- Among the issues identified as significant were the ability to flexibly adapt the rolling stock to one's own business needs which is generally limited in the case of vehicles provided by rolling stock pool and the costs of hire.

What will an open market look like in practice?

What are predefined paths? What will be the RU-s responsibilities?

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	+	+	+	-	+	+	-	+	+	+	+	-	-	+	-	+

 A stakeholder with an interest in the subject


 No discussion of this aspect during the consultation


- The process carried out demonstrated that the concept of predefined paths and the reason behind its development required thorough explanation to stakeholders. During the bilateral meetings, this resulted in a significantly greater understanding of the concept than had been the case during the survey phase.
- Given the early stage of work on the proposal for predefined routes and the remaining open issues, there is still a need for industry discussion on this topic.
- It is crucial to develop rational operating principles for this mechanism and to have the concept validated by market participants.

What will an open market look like in practice?

What will be the possibility of launching services not included in the HRJ under open access decision?

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	+	-	+	-	+	+	-	+	+	-	+	-	-	+	-	+

 A stakeholder with an interest in the subject

 No discussion of this aspect during the consultation

During the consultation, stakeholders raised the issue of the conditions that will affect their actual, rather than theoretical, ability to operate in the market.

What will an open market look like in practice?

What will be the priority for commercial services, and what for subsidised services?

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	+	-	+	+	+	-	-	+	+	-	+	+	+	+	-	-



A stakeholder with an interest in the subject



No discussion of this aspect during the consultation

During the consultation, stakeholders raised the issue of the conditions that will affect their actual, rather than theoretical, ability to operate in the market.

During the process, the Team also gathered a great deal of feedback from market participants regarding the measures implemented during the first phase of railway market liberalisation in Spain.

The following issues were highlighted:

- a tight schedule,
- excessive regulation,
- restrictions on the possibility of step-by-step development,
- a process geared towards large operators

At the same time, some consultation participants **commended the efficient use of limited infrastructure (bottlenecks) and the rewarding of operators who were able to guarantee high utilisation of the capacity allocated to them.**

During bilateral meetings, conclusions drawn from other foreign markets were also discussed, such as: **the Italian, French, British and German markets.** The opinions gathered on the Czech market were also particularly interesting, including those concerning the situation on the Prague–Ostrava line. It was noted that **three competing entities set the upper limit of supply that allows for profitable operations.**

Conclusions: both for PSO and commercial services

A detailed discussion of the stakeholders' proposals can be found in Chapter 5 of the full version of the Report





[Link to the Report \(PL\)](#)

What will an open market look like in practice?

Will smaller RU-s be able to grow organically, or will the measures favour the major players?

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	+	+	+	-	+	+	-	+	+	-	-	+	-	+	-	-

 A stakeholder with an interest in the subject

 No discussion of this aspect during the consultation

During the consultation, stakeholders raised the issue of the conditions that will affect their actual, rather than theoretical, ability to operate in the market.

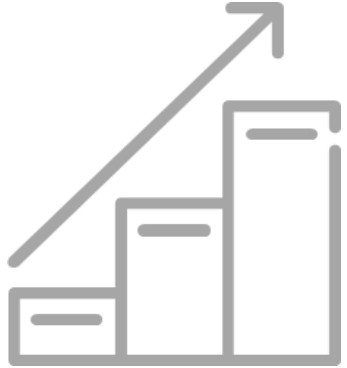
Speeding up administrative procedures



- **licensing and certification processes**
- **over-regulation of the open-access procedure:**
 - open-access decisions valid for only 5 years,
 - long waiting times for decisions in cases involving the Economic Equilibrium Test
 - decisions being allocated to a single RU, which obstructs cooperation on international routes

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	!	!	!	---	!	---	!	---	!	!	!	---	!	!	---	---

- 9 requests
- The complicated procedures were highlighted not only by private entities but also by incumbents.



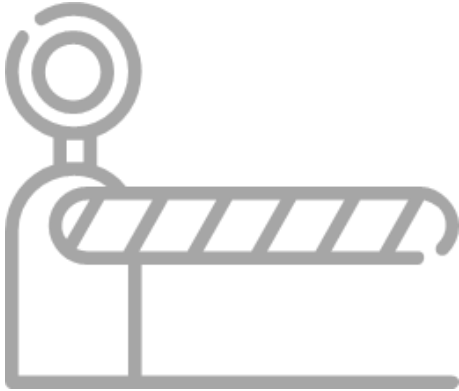
Insufficient market data

- historical data on occupancy/demand,
- passenger traffic forecasts

Lp.	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Odp	!	----	!	----	----	!	----	!	----	!	----	----	----	!	----	!

- 7 requests
- In the area of PSO, the lack of available data makes it impossible to prepare a competitive bid
- Information asymmetry – possession of data gives the incumbent operator an advantage
- Interest in passenger forecasts carried out at HRJ within the Passenger Transport Model developed by CPK

Issues and challenges relating to market entry barriers



There were also a few, but significant, comments regarding barriers to market entry.

Identified needs:

- Improving regulations relating to access to the service facilities – despite existing legislation requiring the SF to be made available to all interested parties, in practice this is often not possible
- Increasing transparency regarding information on available railway network capacity
- Improving the quality of strategic planning in the rail sector



HORYZONTALNY
ROZKŁAD JAZDY

**You can find out more about
the HRJ project on the
website www.hrj.gov.pl**

- Project description
- Stakeholders involved in the HRJ
- International inspiration
- Methodology and tools used
- Schedule of activities
- Description of the consultation process



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