

On the way of one European network

track access fees along the corridor



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SBB Cargo International

In figures

Year founded: 2010

Share capital: CHF 25 Mio.

Shareholders: SBB Cargo AG (75%)
Hupac AG (25%)

Headquarters: Olten, Switzerland

Subsidiaries: SBB Cargo Deutschland GmbH
SBB Cargo Italia S.r.l.

Employees: ~ 700

Traffic capacity II: 13 MIO TrainKM (ca. 50% in D)

Traffic capacity: 10 BIL. NTKM

Locomotives: ca. 120

Market share: 55 % in transalpine intermodal



SBB Cargo International

smoothly processes in all countries of the Corridor A guaranteed.



Independent access to the market in NL, DE, CH, IT

Independent RU in Italy since 2003

250 employees in ITA

ITA train driver can licensed also in CH (Brig, Bellinzona)

Interoperable Locomotive Fleet (incl. ETCS (-CH))

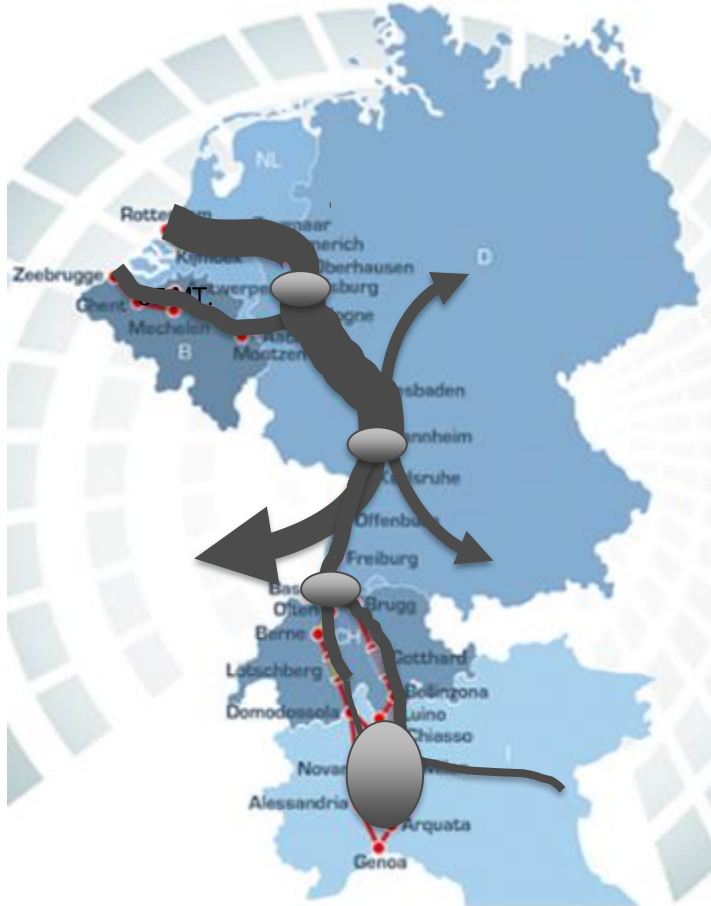
Especially combined transport oriented (>70%)

700 Train / Week per

High partnership proportion

First Mover the Corridor?

Core artery's must run stable business



- **Corridor A "Rotterdam and Genoa"** (1300 km, 4900 km rail network) is defined one of the six central traffic axes in UE
- **Performance:** 28.5 billion tkm (2010) all transport modes. Target 2020: 56 Mrd. tkm
- The **Management** needs a stronger European market focus !
- **1500 int. trains/week with** at least one across border, 55% combined traffic trains
- **Modal split** (source: *Implementation Plan KOR A*)
 - **Total:** 232 million t
 - **Inland waterways:** 54% (calculated: 125 million t)
 - **rail:** 14% (calculated: 32 million t)
 - **road:** 32% (calculated: 74 million t)
8 mil t to be shifted

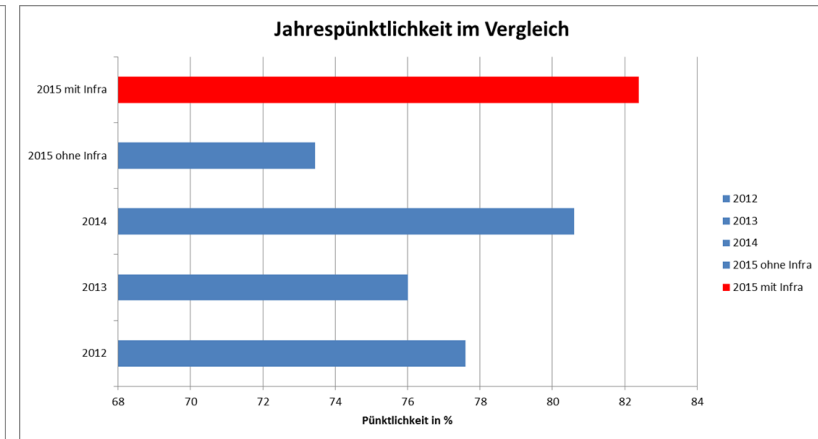
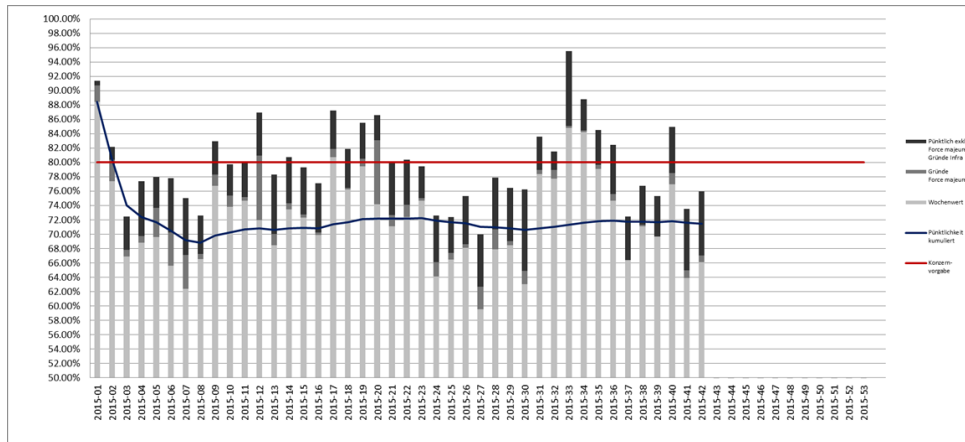
Remark:

- what was tested on the corridor could be transfered to the network
- Huge proportion of road trailers could be shifted to rail in Europe
- Need of corridor harmonized structures

Sidestep: Quality

Paradox: ontractswise RUs are highly punctual BUT sector is suffering...

Punctuality 2015 and in parallel the years 2012 - 2015

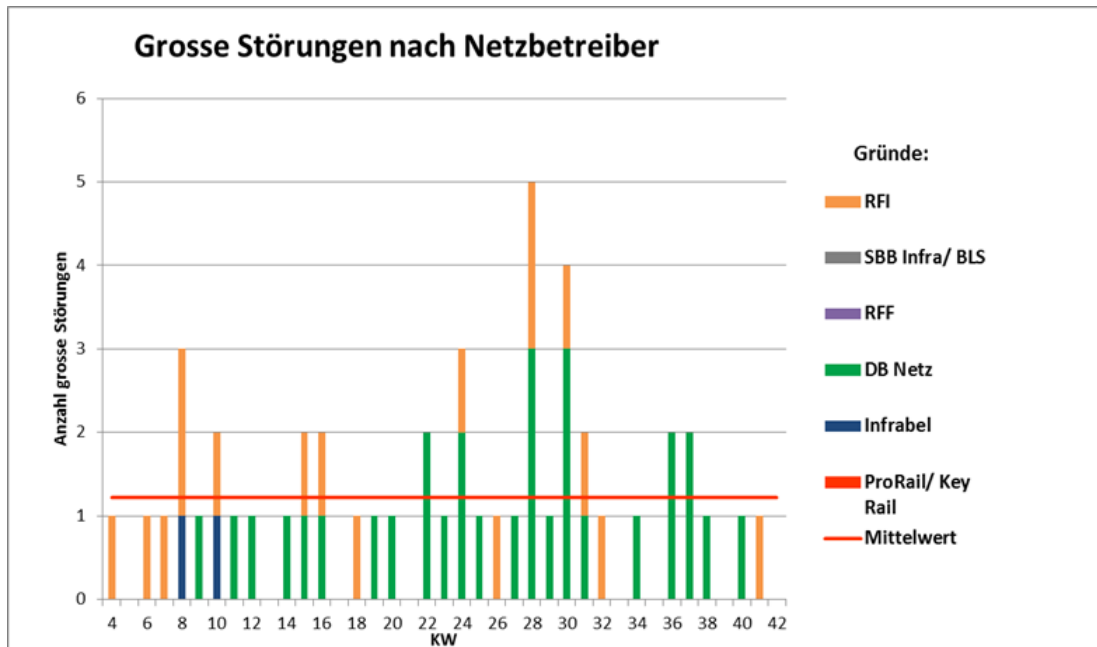


Remark:

- Sector punctuality obviously below 80% (1h arrival)
- Contractual punctuality obviously over 90%
- Near by **20% external** impacts
- **external influences** at about 2/3 most of it INFRA

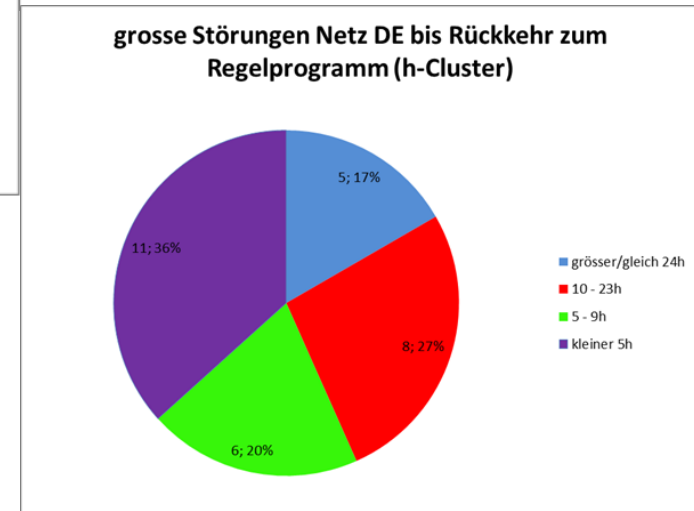
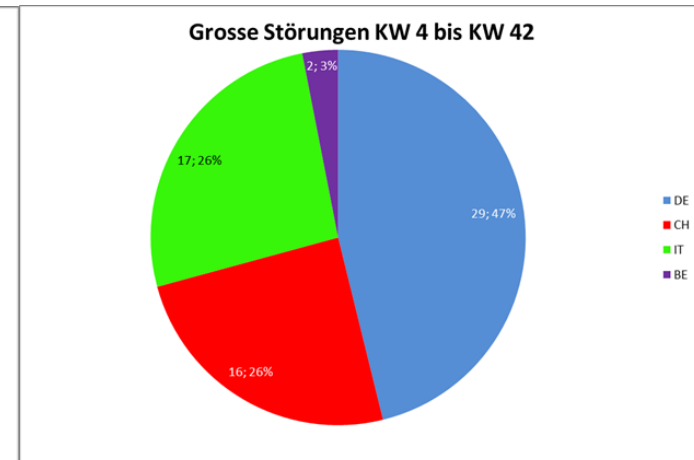
Sidestep: Quality

big* disruption 2015 each network including compensation time



*Definition big Disruption:

1. At least 1 train default (Last)
2. Influence on the whole system with secondary delays, over the relative relation (Train pair)



Sidestep: Quality

reduction of big impacts needed



Remark:

- Number of incidences significant high in the south
- Solution: more reserves for Infra delays put in place PLUS 5%

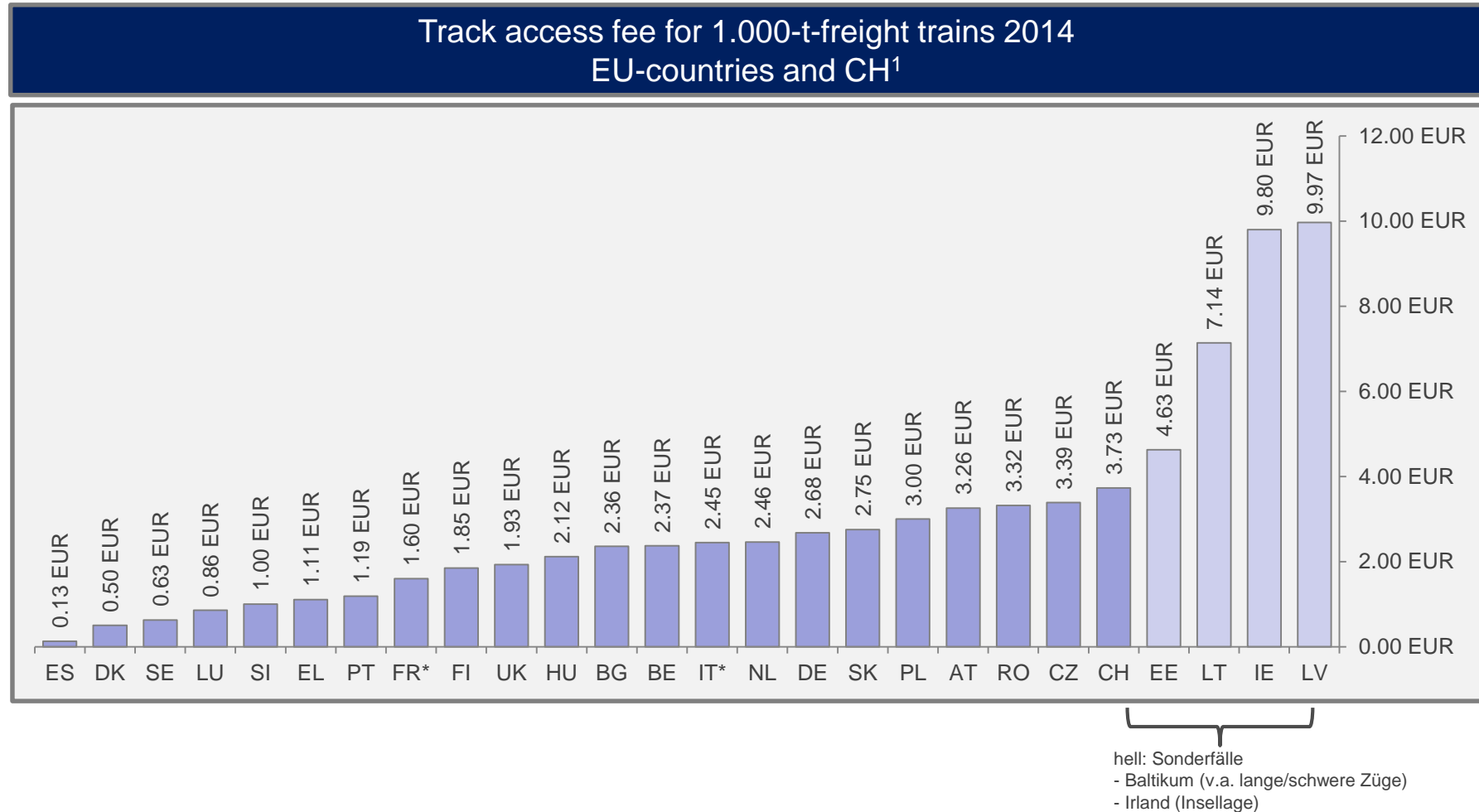
theme	impact	burden
Traincancelations due to big incidents and track works	Number: 248	lack of turn over: 3.7
Delays due to incidents and trackworks (494) Infrastruktur, Wetter, Streik, etc.	Zusätzliche Ressourcenbindung: ca. 62000 [h] est. fullyear	surplus reserves COST LOCO: 6.0 Cost FTE: 2.5
SUMME added costs		8.5

Remark :

1. reduce impacts below <3h
2. make big events to small events – we will have incidents aslo in the future
3. Freeze track access for more then 5a

Fee Structure - Price

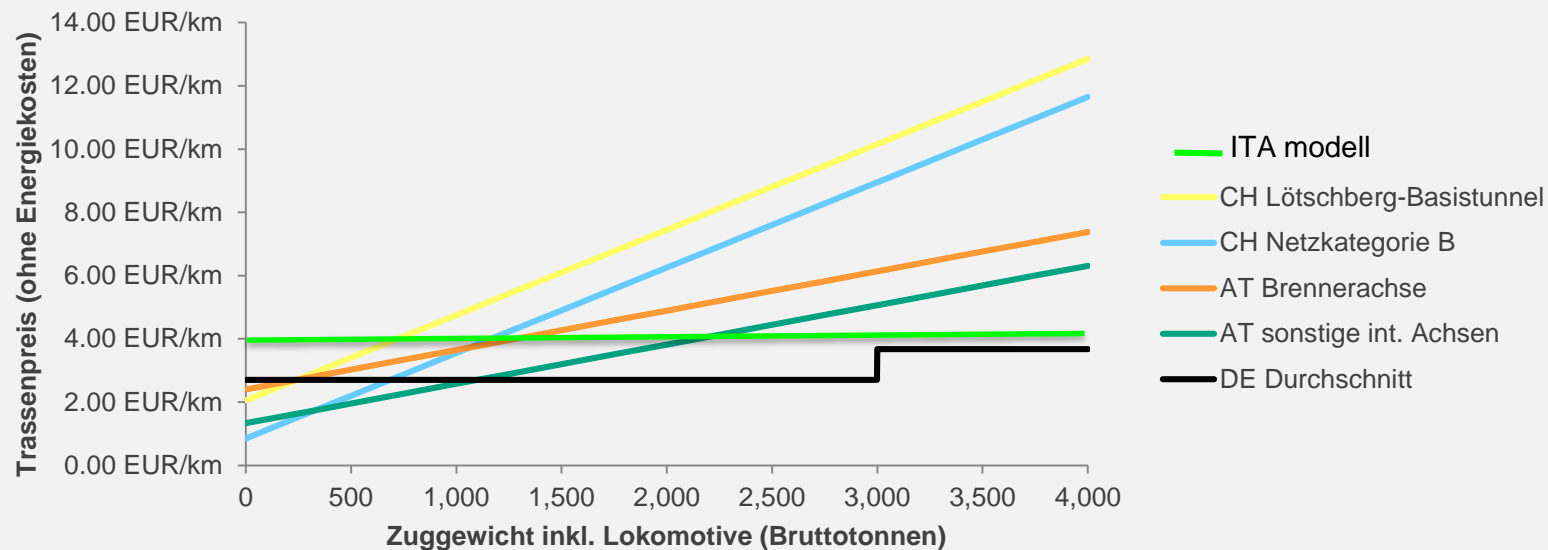
Hudge deviation of fees country by country



Fee Structure –modells

Hudge deviation of structure modells along the corridor

Special views for fee structure modells along the corridor

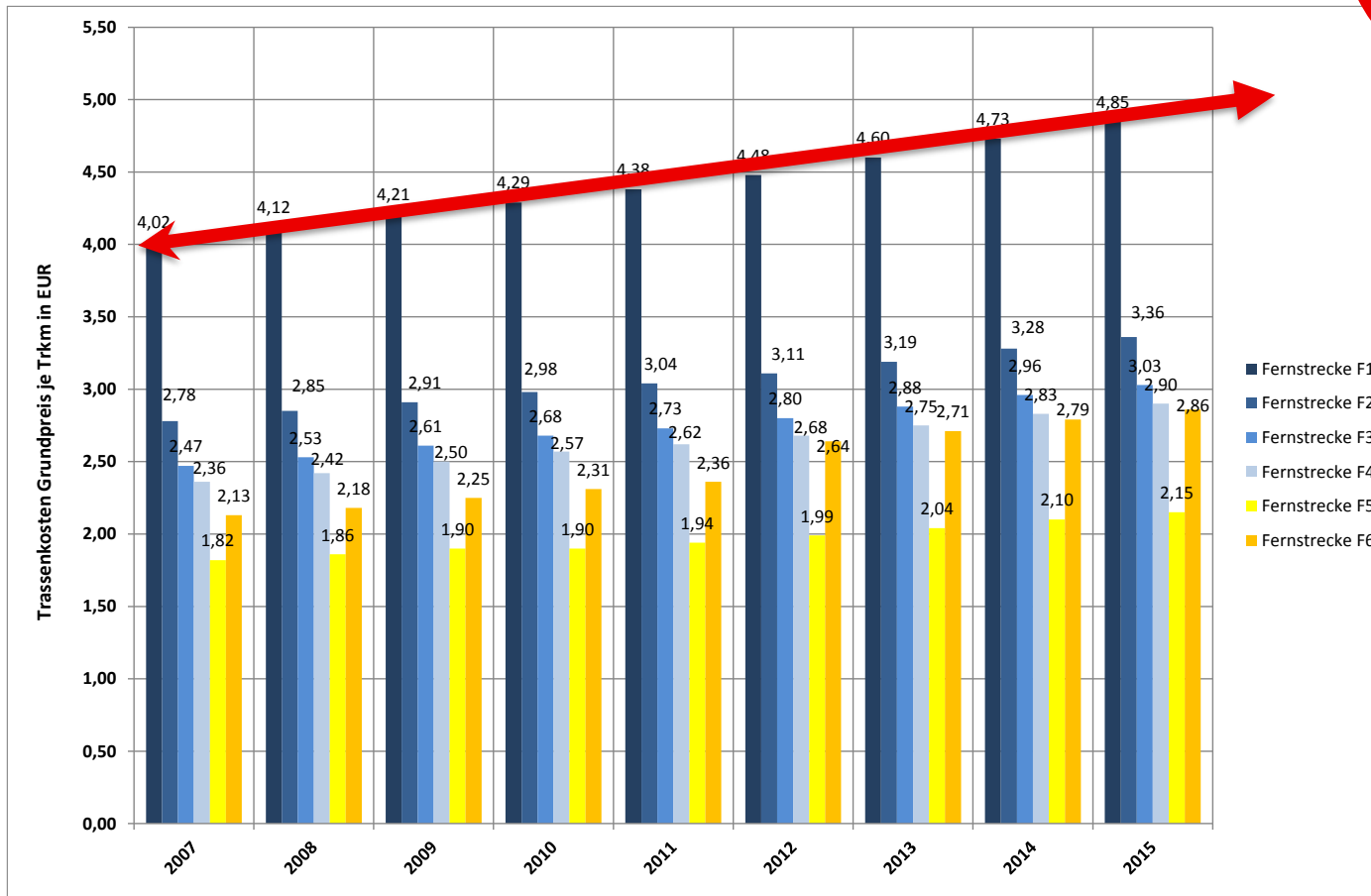


DE System at the moment the only one
Which raises capacity

Fee structure: Developement path example DE

At about 50% above inflation

Inflation
im Mittel
1,6%



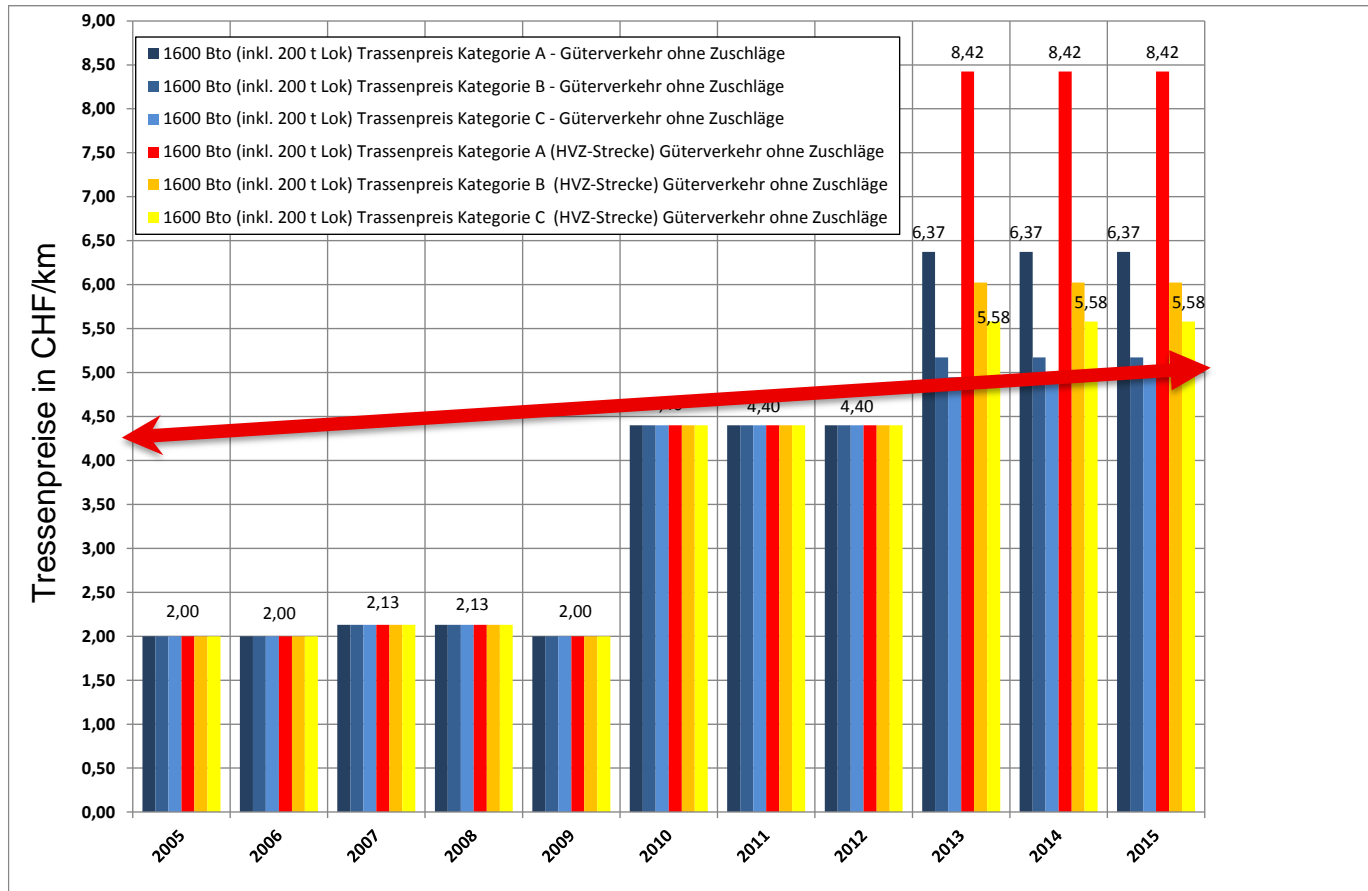
- Prize developement avarage at about 2,5 % during 2007-2015
- Demand was going to the stock market and screwing KPIs (like ROCE)



Fee structure: Development path CH

Development CH mostly driven by law

Inflation
im Mittel
0,3%



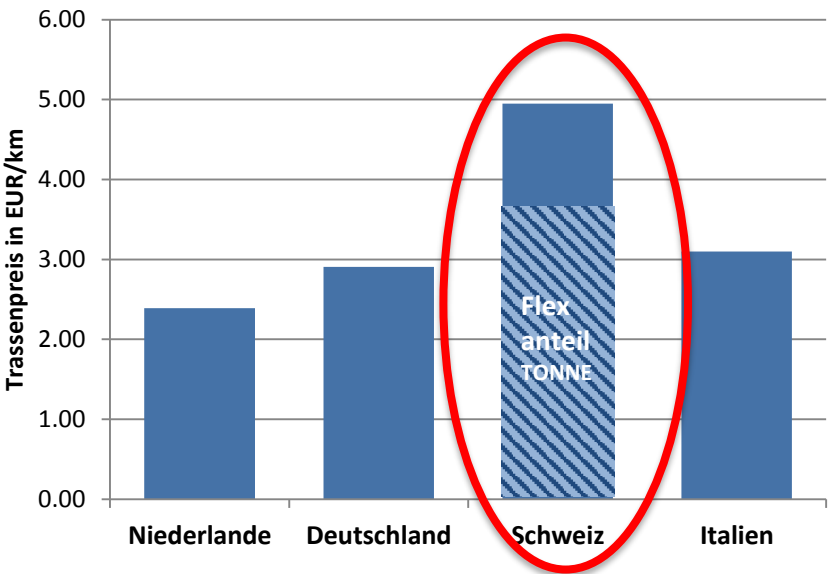
- Highly komplex since 2013
- Driven by strategy of shifting road to rail by BAV (s. 2010 swop of subsidies to shippers)

EU-Standardization?

Exp: train 40201 Rotterdam – Gallarate

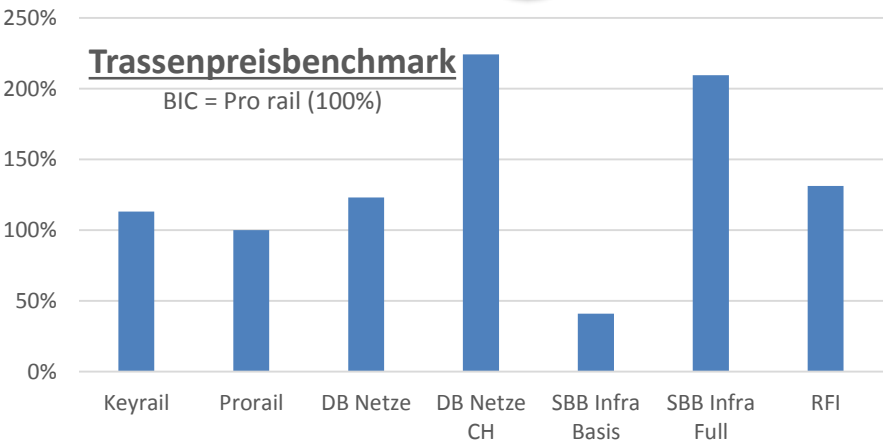


Trassenpreisvergleich je Kilometer



Trassenpreisbenchmark

BIC = Pro rail (100%)



EU-Standardization?

Future in some countries along the corridor

Big changes:

- NL year by year discussion about reducing track access fee in area of passenger
- DE new market oriented fee structure
 - passenger price developement is linked to subsidies
 - also noise induced price elements
- CH new system oriented on deterioration
 - highly complex
 - different waggontyp causes different prices
 - different locos causes different prices

Requests:

- **Standardization** of prices needed
- **Reduction of complexity** urgently needed
- **One prize** along the corridor done by corridor managment
- **Prize freeze next 5a** due to bad performance (track works)



SBB Cargo International

THANK YOU

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Heavier but lighter
Longer but shorter
Higher but lower

