



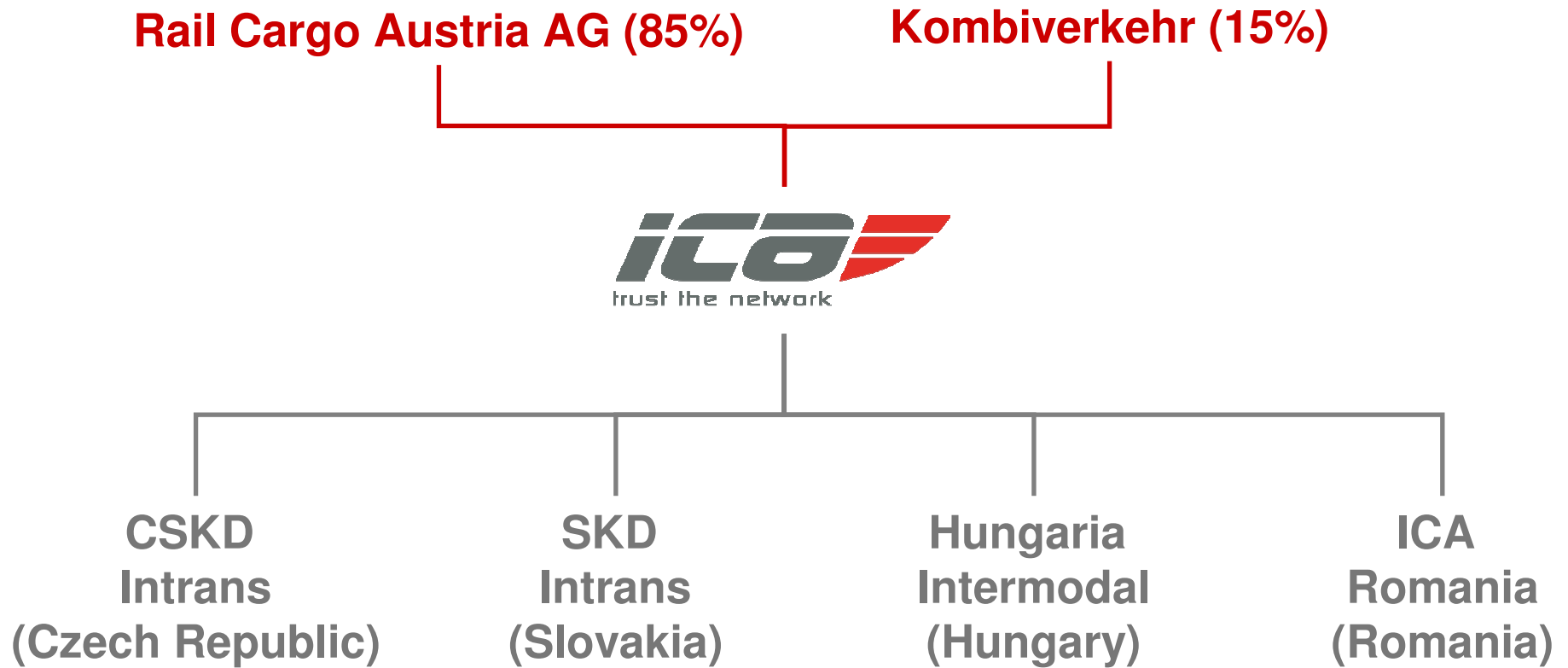
„The Way Forward“:

Seen from the Viewpoint of an Intermodal Operator

Wilhelm Patzner, Intercontainer Austria



ICA Shareholder Structure:

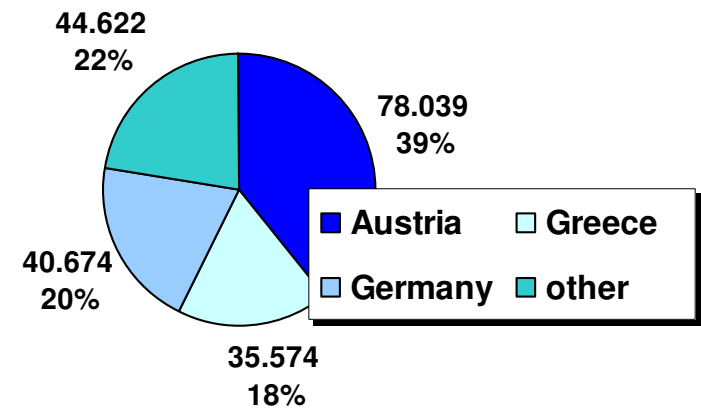
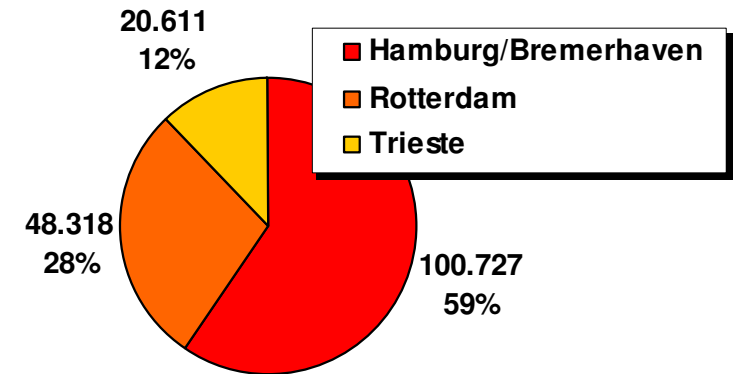
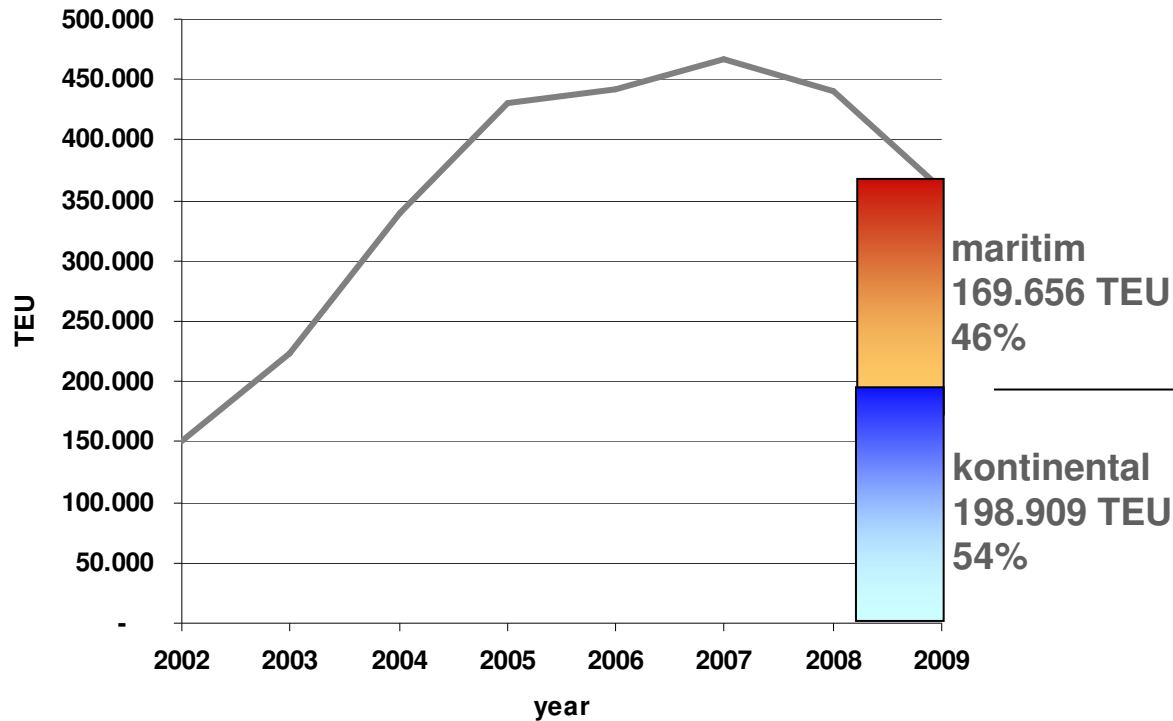




Transport Volume and Structure 2009:



ICA 2009
368.565 TEU
-16% to 2008





The Way Forward Model:



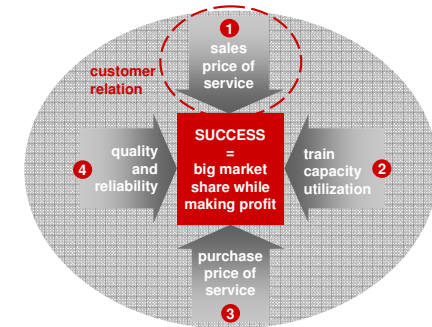


1. Pricing: Competition between Modes



truck:

door-to-door-delivery, e.g. 1.000km x 1,00 € = 1.000,--
1 trailer



train:

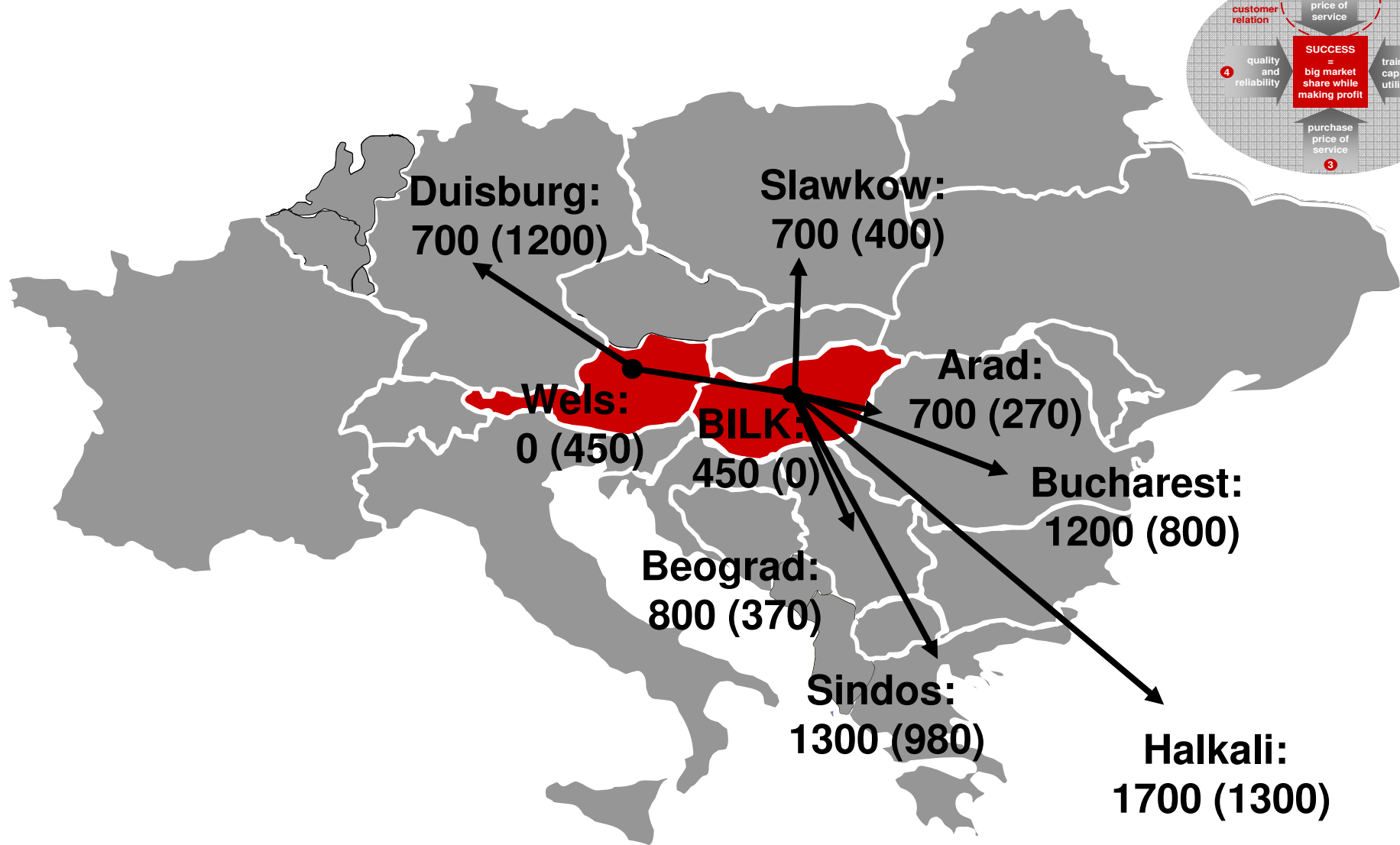
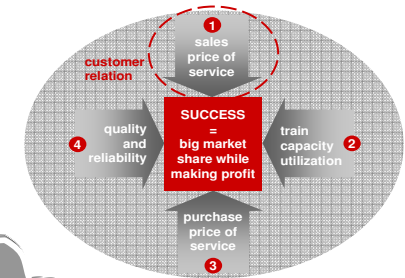
- trucking A, e.g. 150,-- €
- handling A, e.g. 25,-- €
- train A-B, e.g. 28 trailers on the train (=80% of assumed 35 capacity)
- handling B, e.g. 25,-- €
- trucking B, e.g. 150,-- €

⇒ to be competitive one trailer could cost 650,-- ($1.000 - 350 = 650$)

⇒ therefore, the railway could charge $650,-- \times 28 = 18.200,--$ or 18,2 €
per train km minus a certain margin and agency for the operator (!)

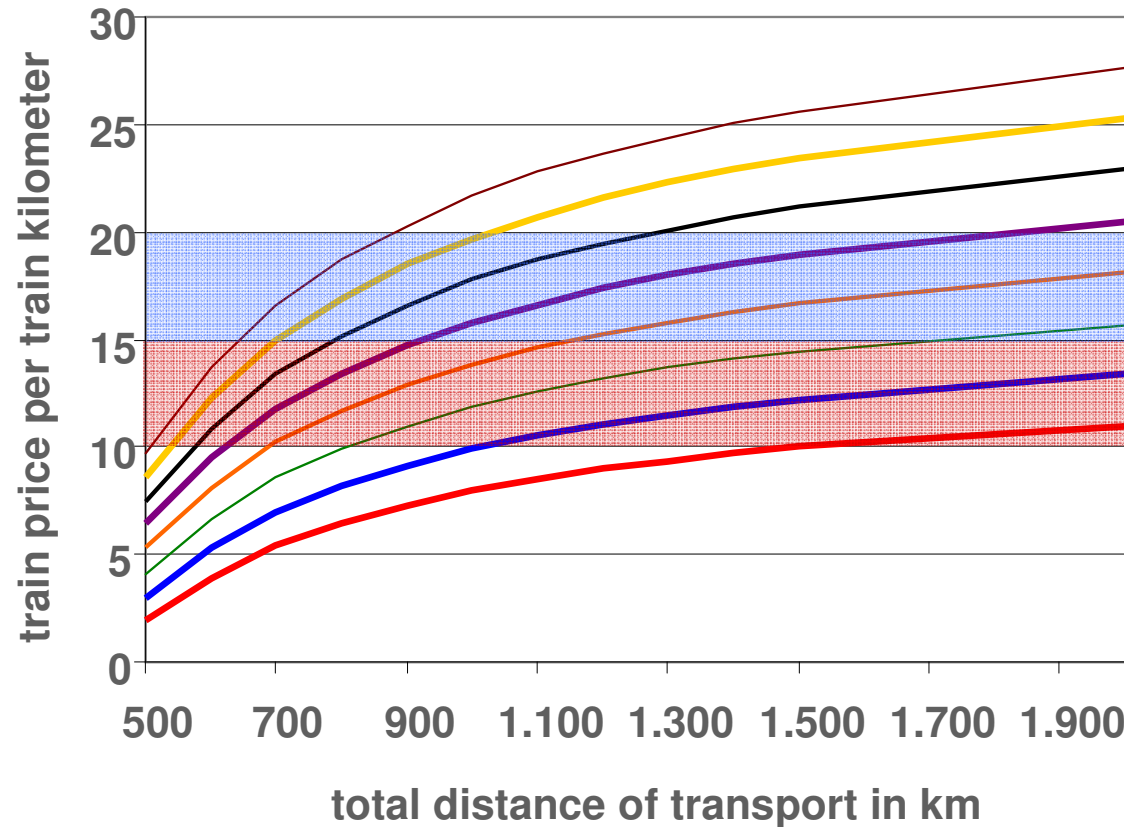
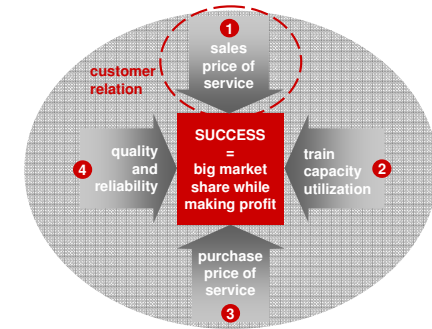


Distances in CEE from Wels and BILK:





The Efficient Zones: Beauty and Biest



target price for railway
target price for operator

- 0,50
 - 0,60
 - 0,70
 - 0,80
 - 0,90
 - 1,00
 - 1,10
 - 1,20
- truck price per km in €



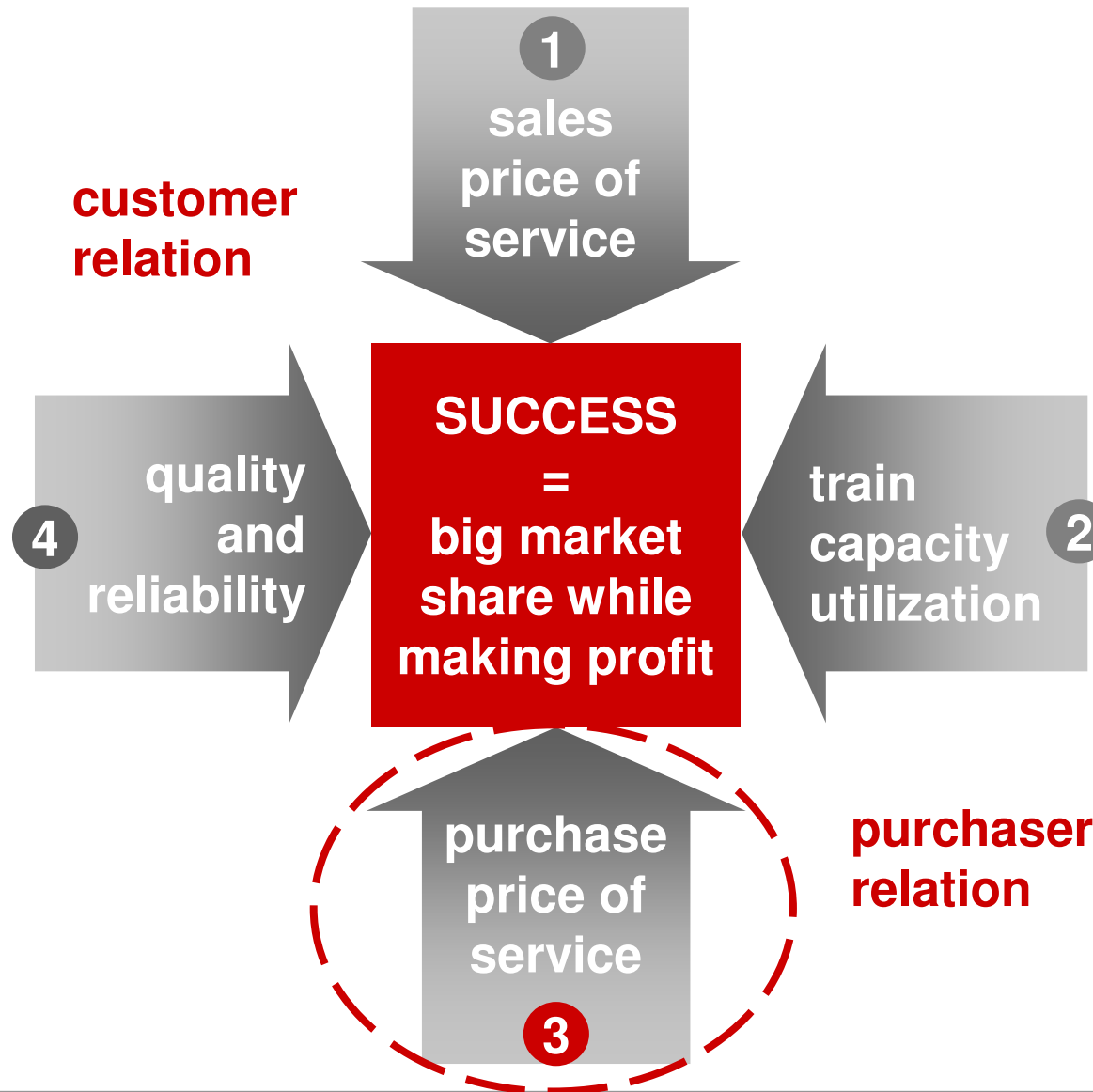
2. Issues of Capacity Utilization:



- daily business for operators
- new pricing models: early bookers versus spot pricing
- market leaders carry the biggest capacity risks: who pays for that?
- cooperations increase capacity utilization and, therefore, the economic survival



3. Purchase Price of Railway Services:



- train costs are key to operator's economics (shown in slide 7)
- state railways often 10-20% more expensive than private railways
- contribution margin oriented calculation/ decision approach from railways needed
- state railways need „their“ operators, otherwise they would lose a lot of business to private railways



4. Quality and Reliability:



- quality level of railway services must improve dramatically
- IT automated information flows between railway-operator-customer must become state-of-the-art (CEE?)
- long term price contracts could improve intermodal reliability significantly



Sensitivites in the Model: Summary

