

**HOW CAN HS AND LOW COST BE COMPLEMENTARY?
DO THEY SERVE DIFFERENT NEEDS?
CAN THEY COORDINATE?**

NTV

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52 connections everyday

- Hourly frequency between Milan and Rome
- Bi-hourly frequency between Rome and Venice
- No stop services between Rome and Milan
- Introduction of new stops: Reggio Emilia; Rimini, Pesaro, Ancona

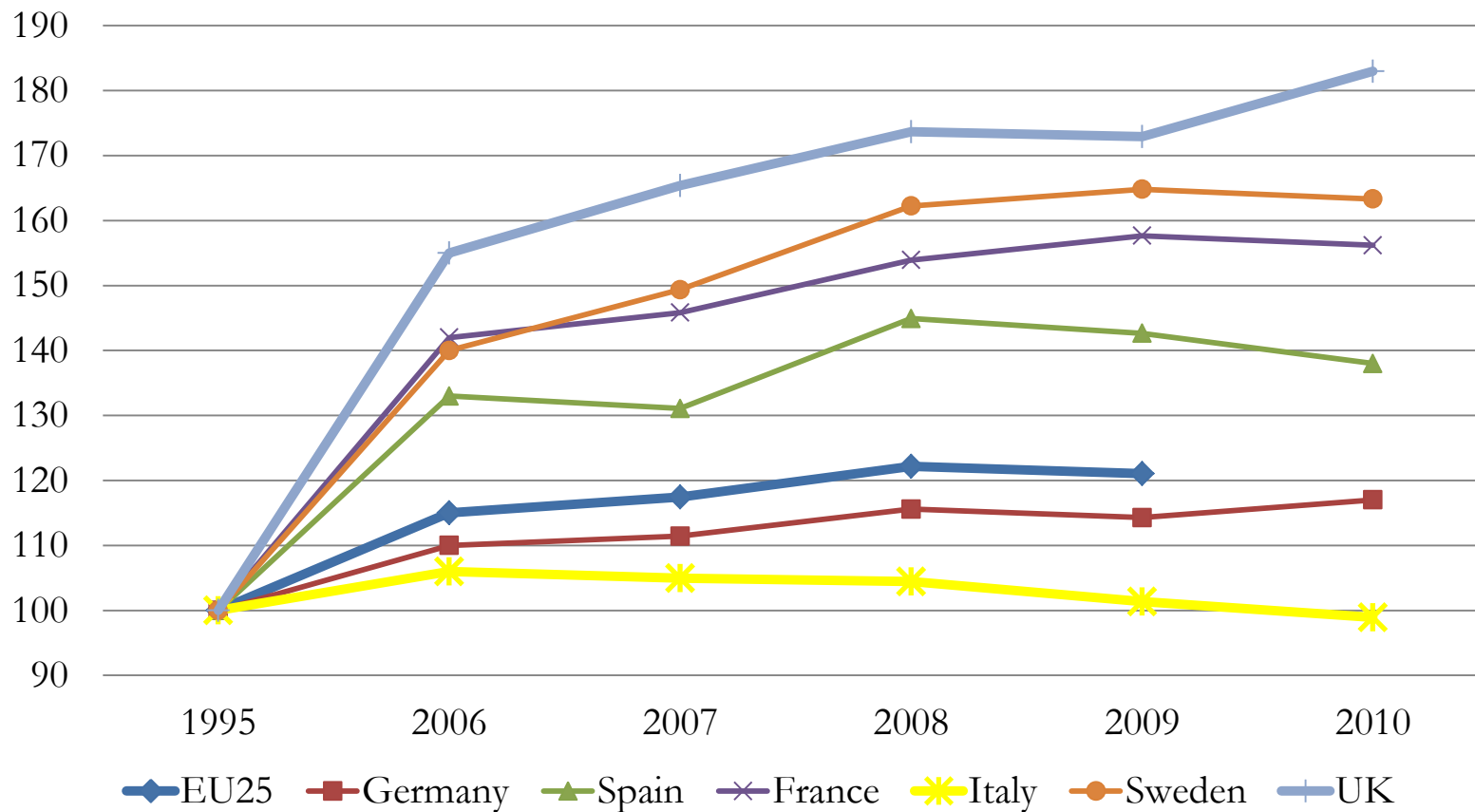
13 cities and 16 stations

12 MILLION KILOMETERS PER YEAR



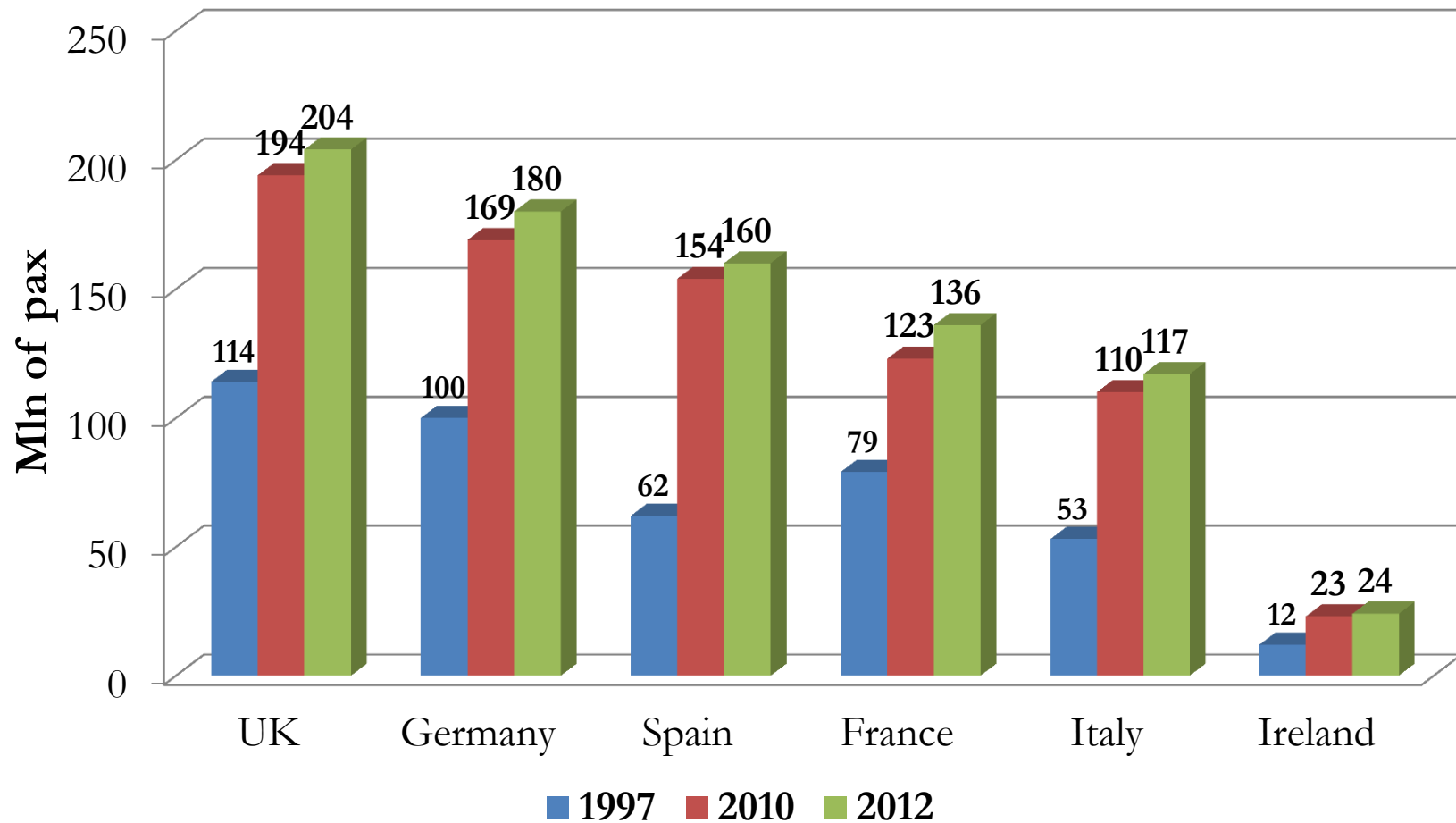
WHICH MARKET LIBERALIZATION?

Passenger Rail market from 1995 to 2010 in Pax-KM (Year 1995 = 100)

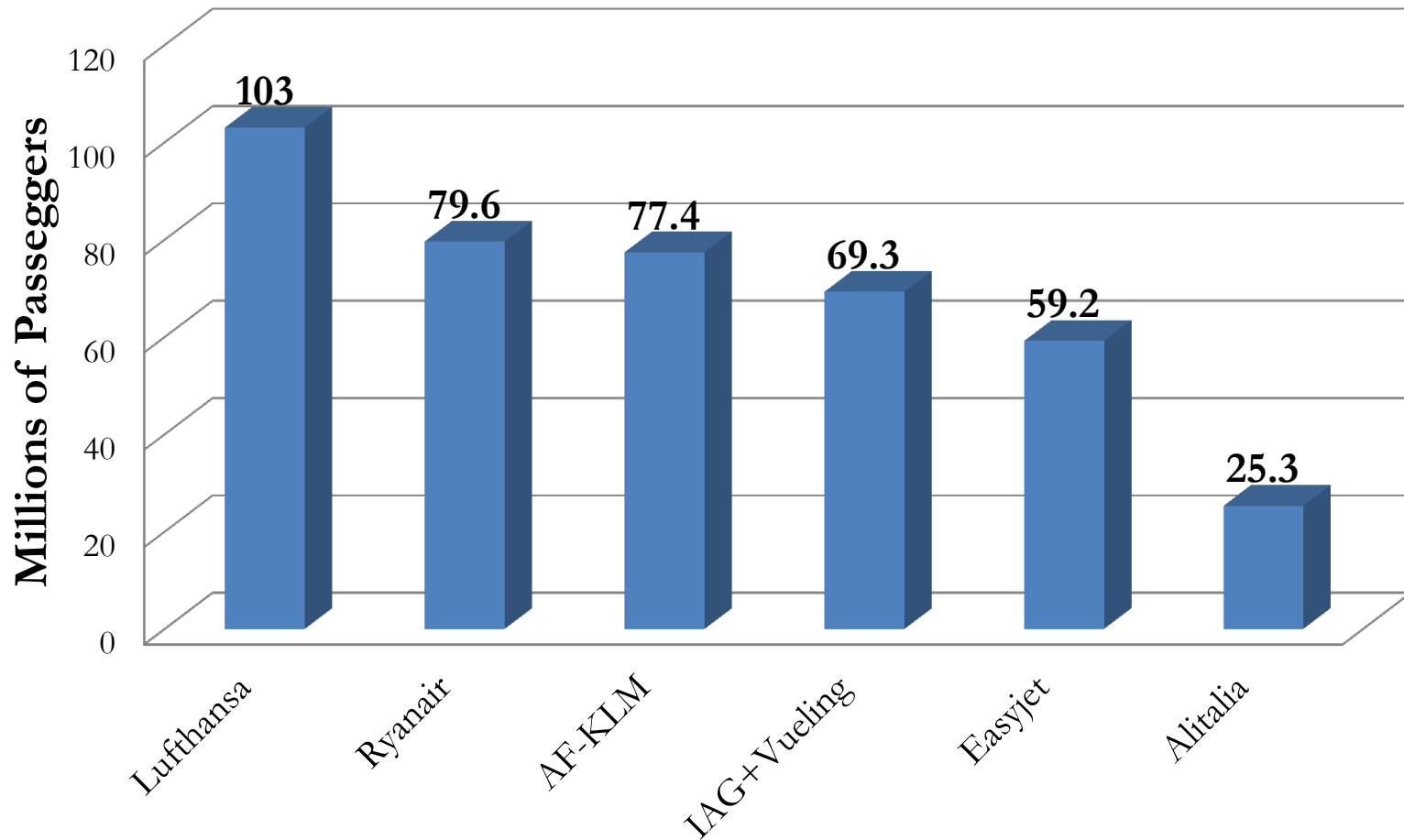


Font: Elaboration Studies Office NTV of Eurostat statistics

Air Transport market (mln pax)

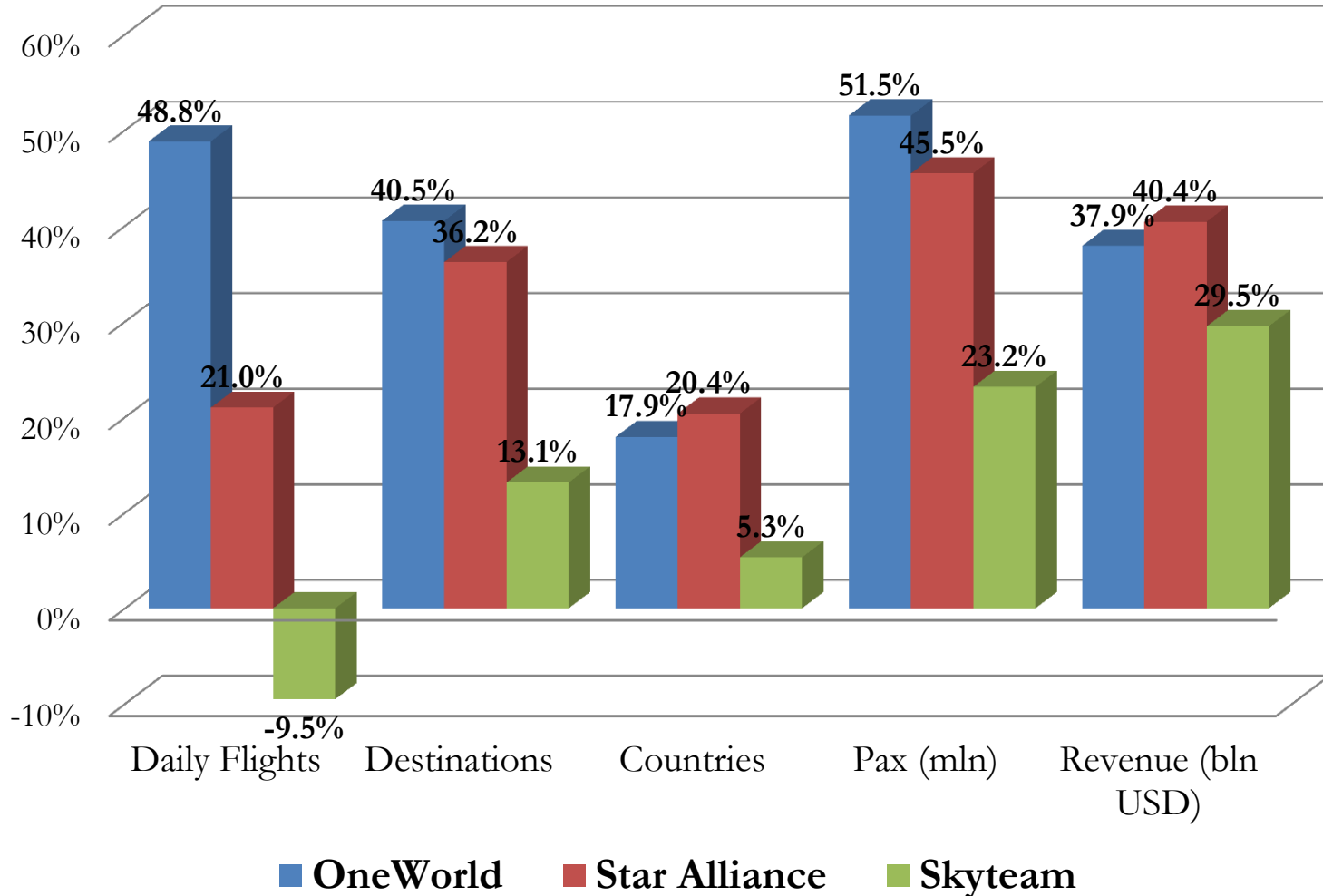


Pax traffic- European carriers

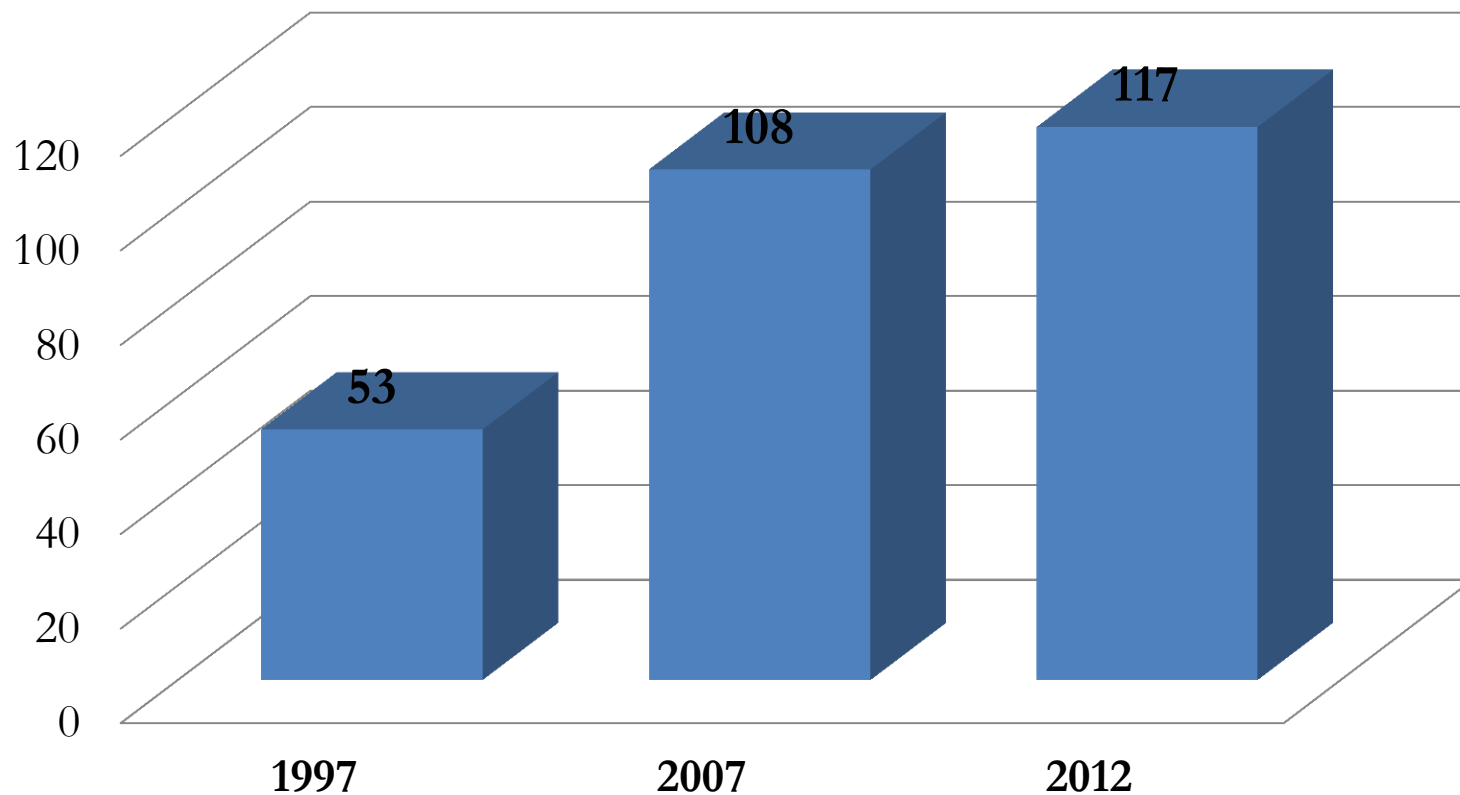


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Air carriers Alliances (2008-2012)



Pax Air transport Italian Market from 1997 to 2012 (in millions)

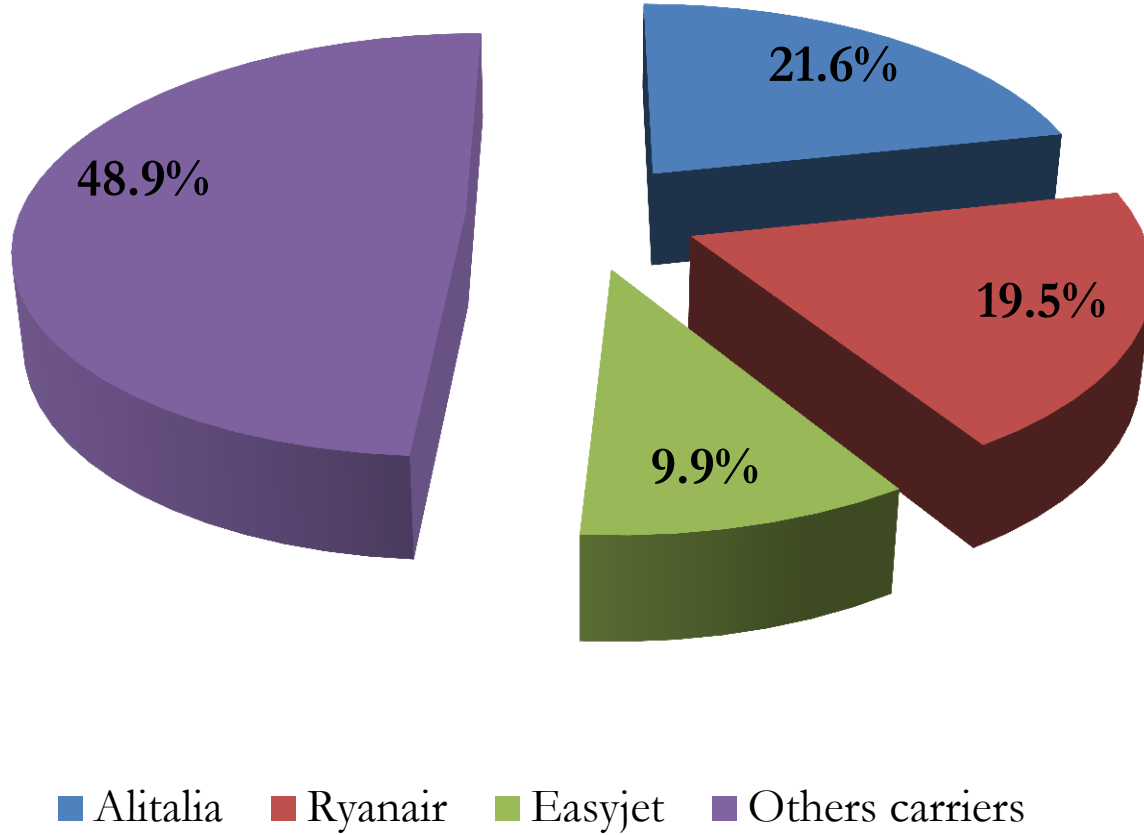


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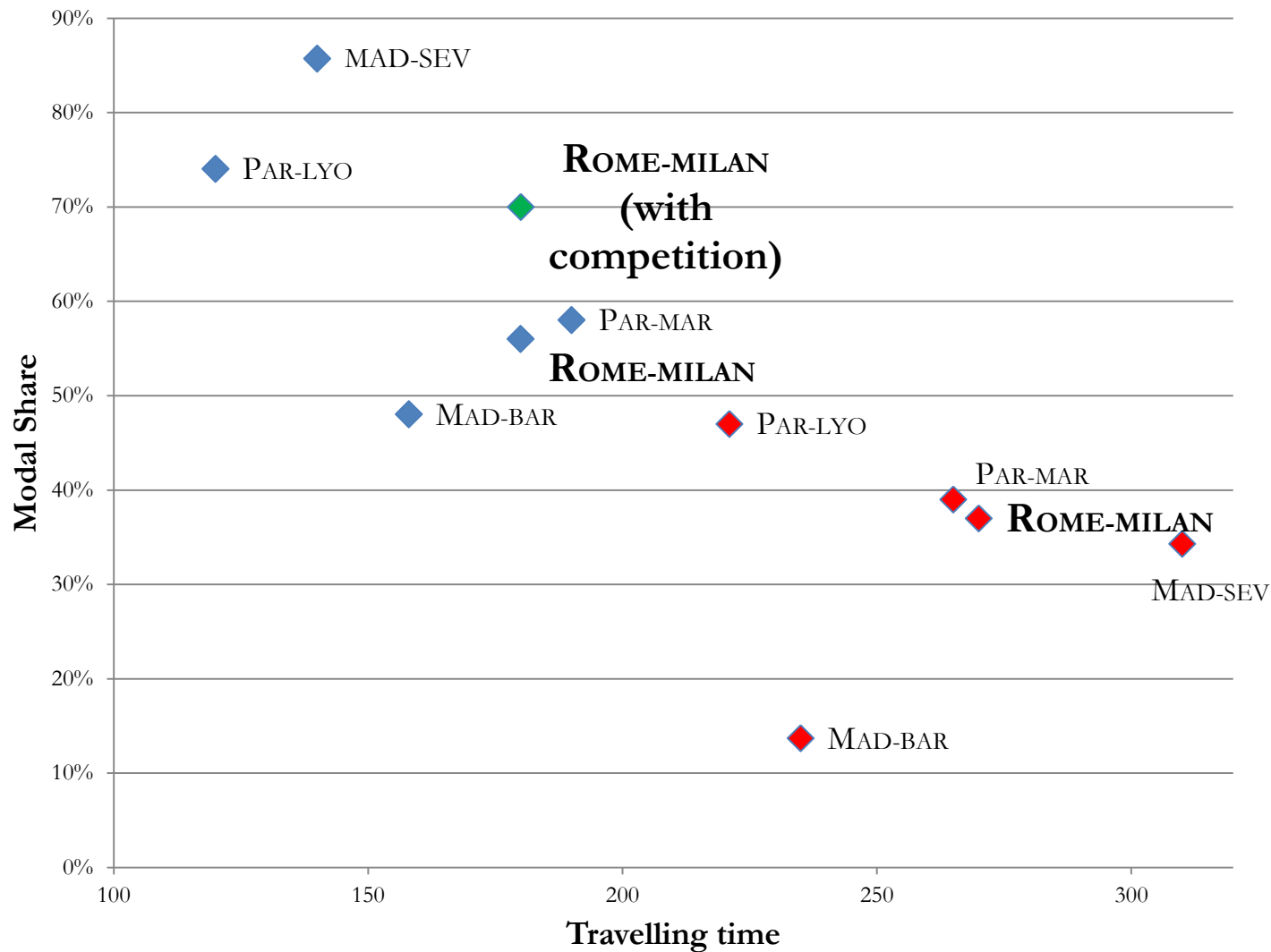
Air Italian market in 2012

(Pax= 116,9mln)



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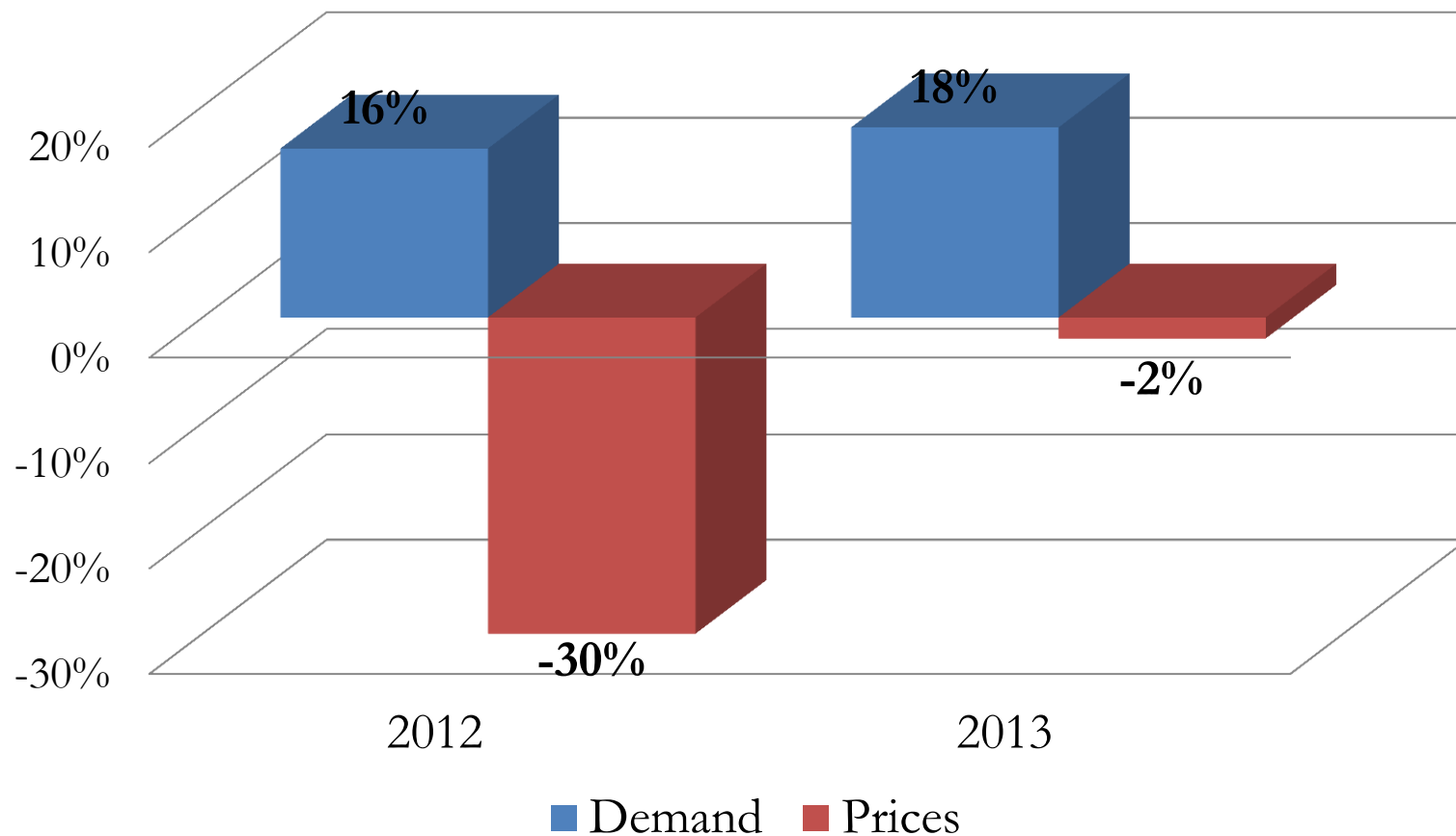
MODAL SHIFT AND COMPETITION



In red: without HS
In Blue: with HS
In green: with HS in competition

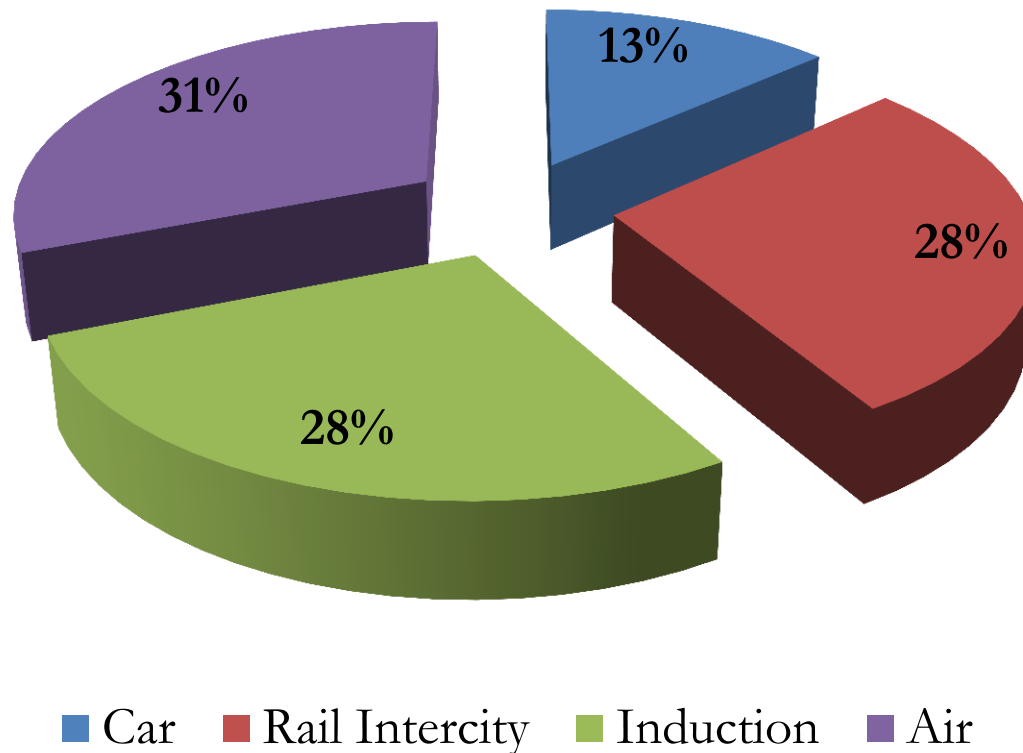
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Open Access in Italy



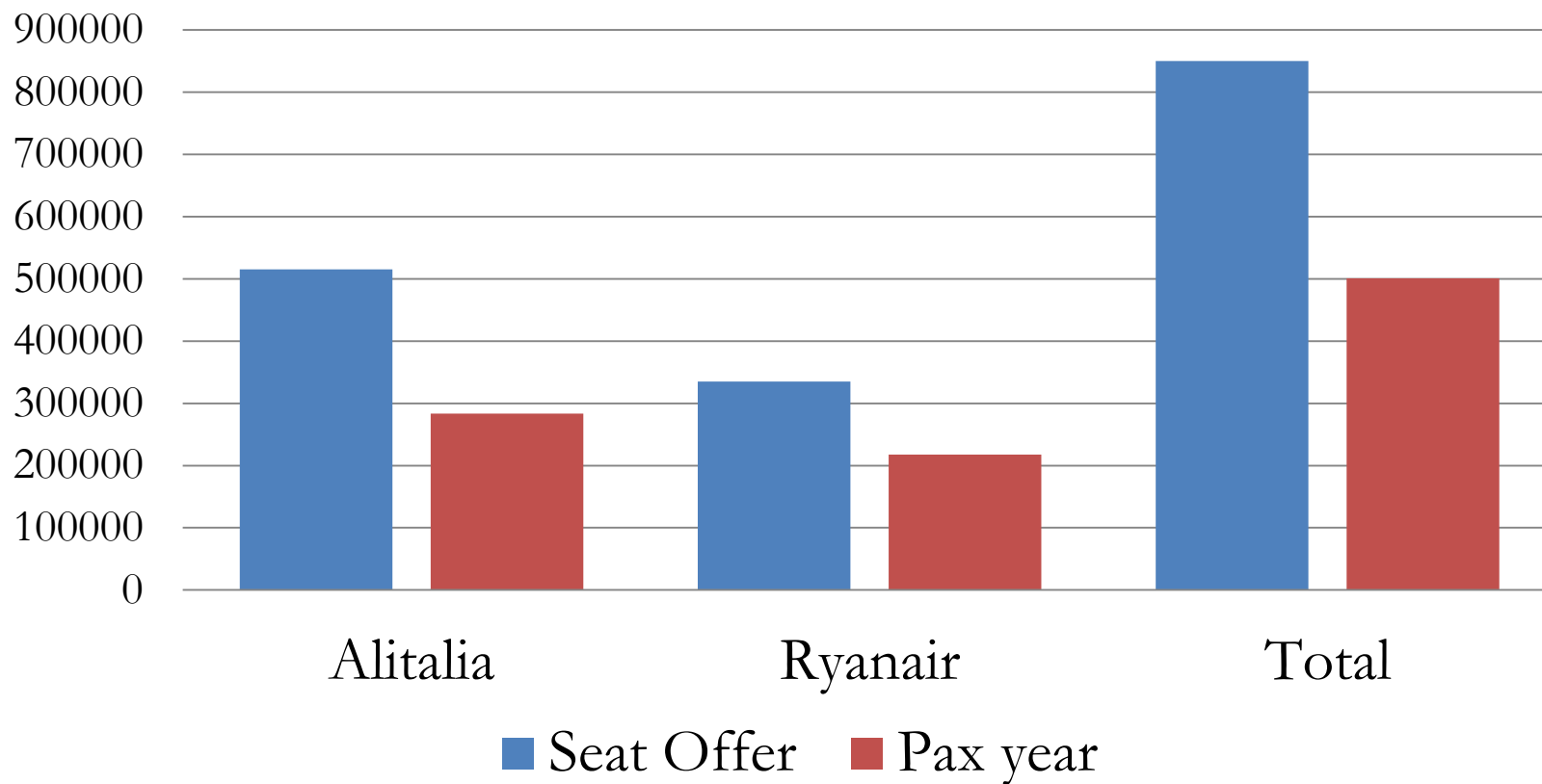
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HSR - New demand in Italy in 2012 (7,1 Mln more Pax)



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Air market Rome - Milan (year 2014)



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To increase catchment area NTV made agreements with air carriers

- Ticket integration – Cathay Pacific agreement
- GDS integration – Hahn agreement (more than 260 airlines companies)

Intermodality and door to door services is a reality

- Public transport agreement (Florence and Naples)

Low cost & HSR complementary?

- which model of LC? Vueling or Ryanair?

A photograph of a red high-speed train at a station platform. The train is the central focus, with its sleek, aerodynamic nose and large windows visible. The platform is in the foreground, and the background shows a clear blue sky with some clouds and distant hills. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text "THANK YOU FOR YOUR KIND ATTENTION" in a bold, dark red, sans-serif font. The text is centered within the box and is clearly legible against the background.

**THANK YOU FOR
YOUR KIND
ATTENTION**