

# Competition in Italy

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26<sup>th</sup> of November 2020

# Experience of competition

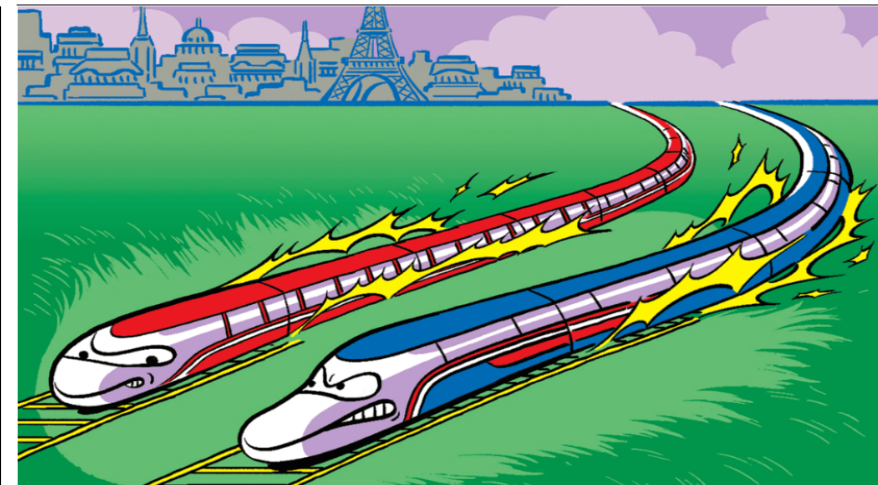
Q Search

Bloomberg Businessweek

## The Discount Airline Model Is Coming for Europe's Railways

● Ryanair and EasyJet transformed low-cost continental travel. Get ready for no-frills trains.

By Carol Matlack



REUTERS

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Detained In Myanmar

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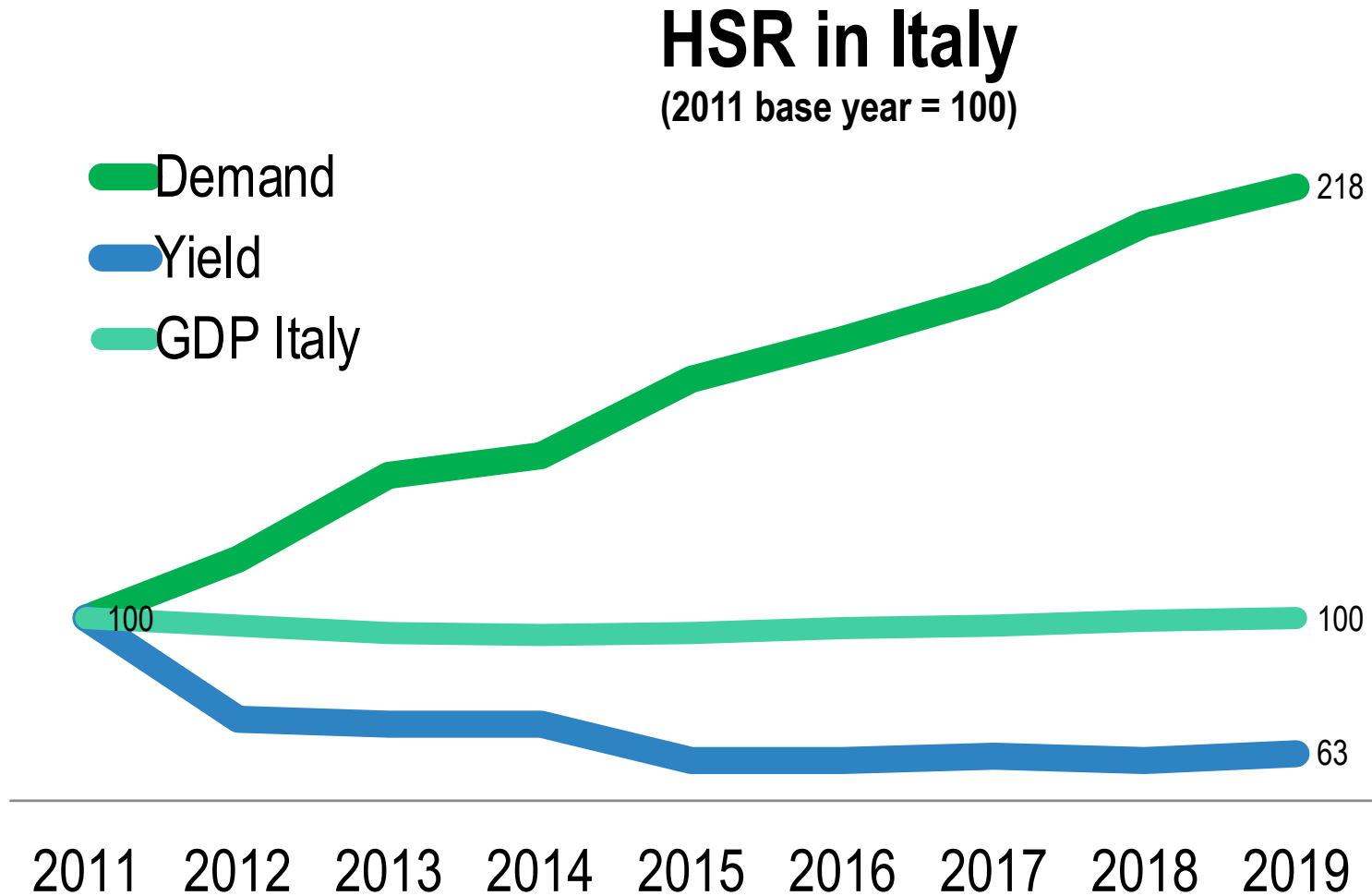
MARKET NEWS JANUARY 23, 2018 / 6:38 PM / 8 MONTHS AGO

## Destination Europe for Italian high-speed rail upstart

“In the next few years trains will be extremely important in Europe and our business model can be exported very easily elsewhere,” Luca Cordero di Montezemolo, Italo’s co-founder and chairman, told Reuters in an interview at the company’s headquarters in Rome.

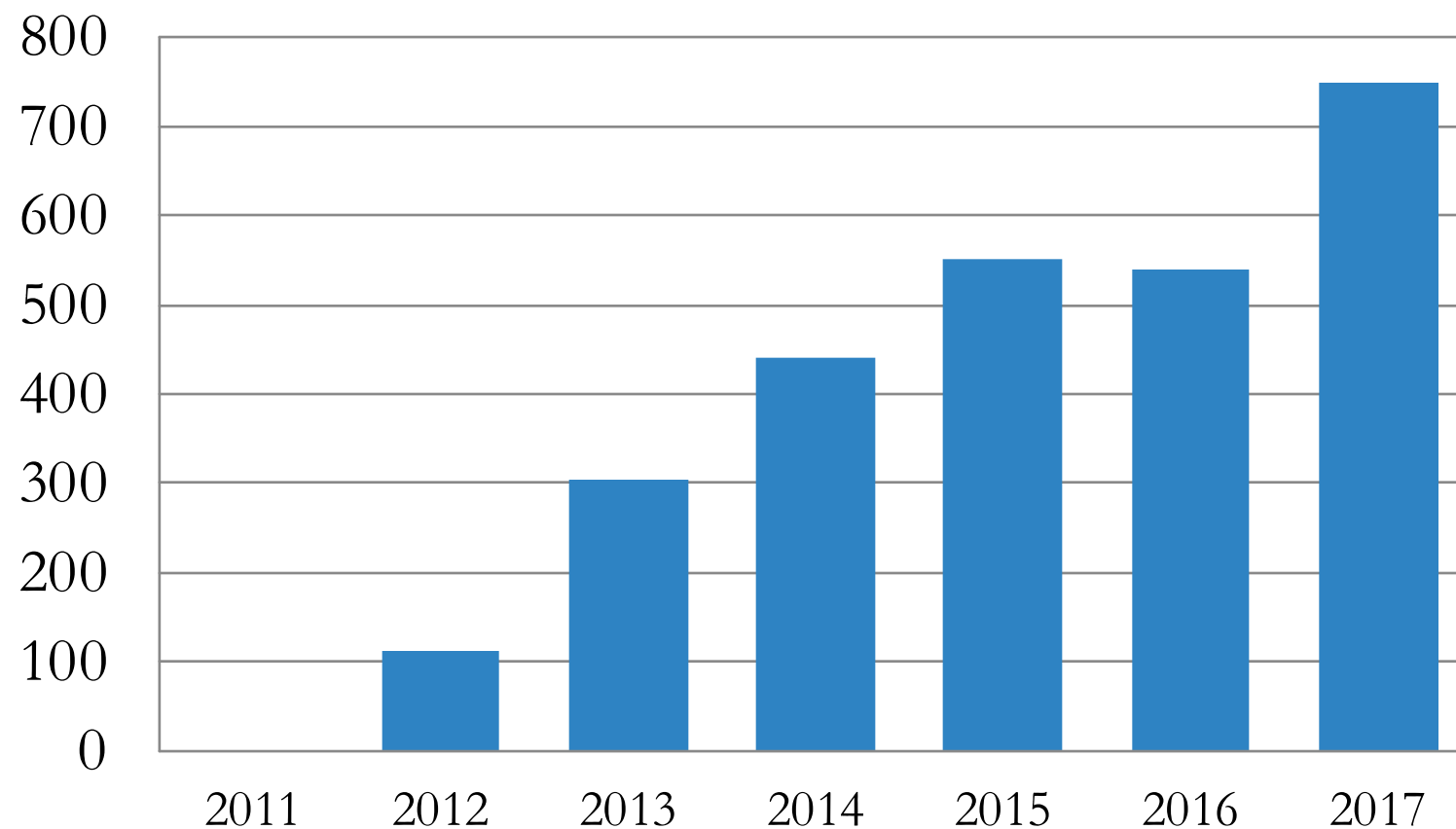
The rewards could be large in a European high-speed rail market that is estimated to grow by 70 percent to over 27 billion euros (\$33 billion) in annual revenue by 2025, according to data from TRA Consulting.

# Experience of competition in HSR



# Experience of competition in HSR

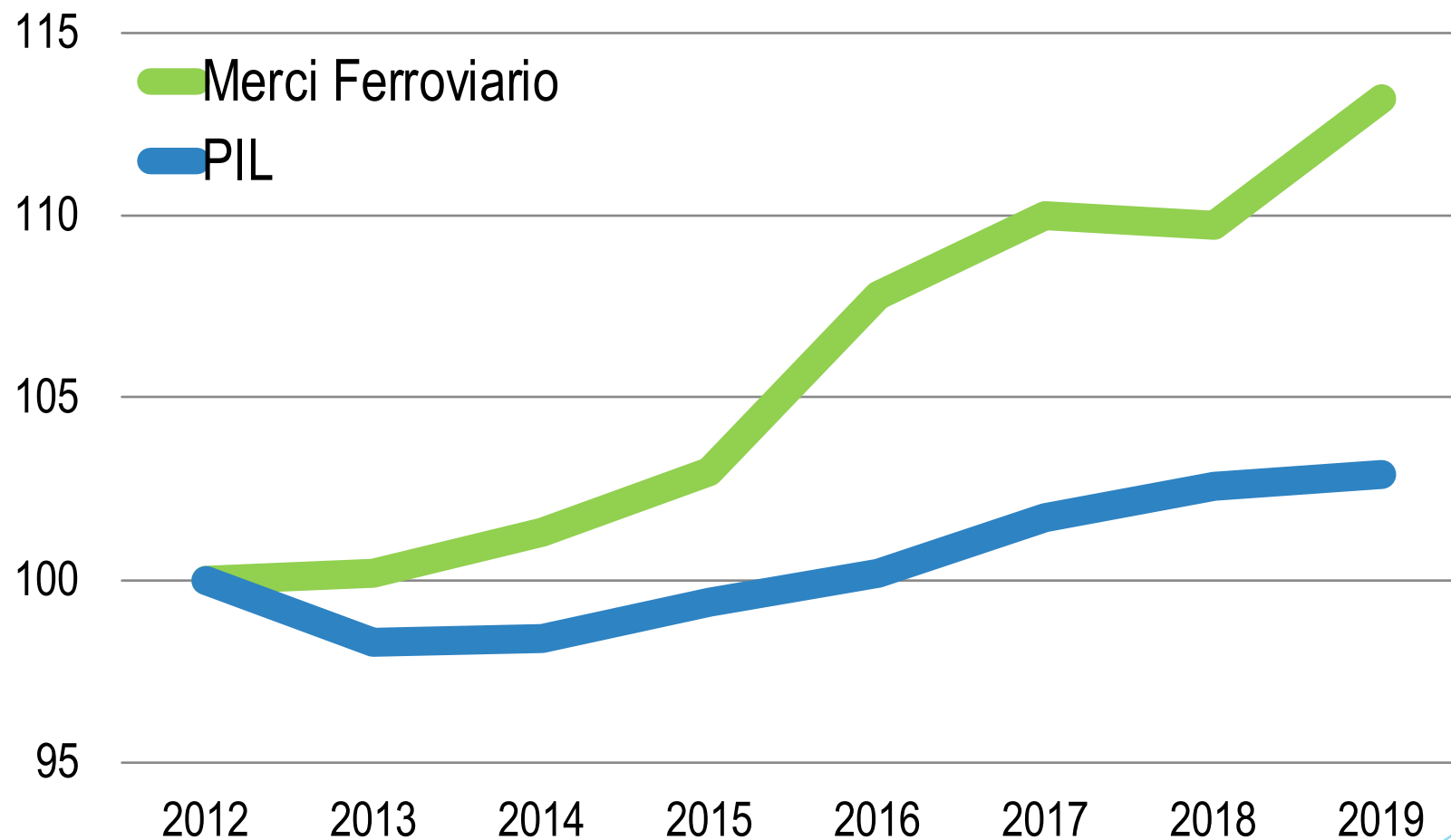
**Mercato annuale aggiuntivo AV rispetto al  
2011 (in milioni di euro)**



Source: Elaboration from datas of the companies

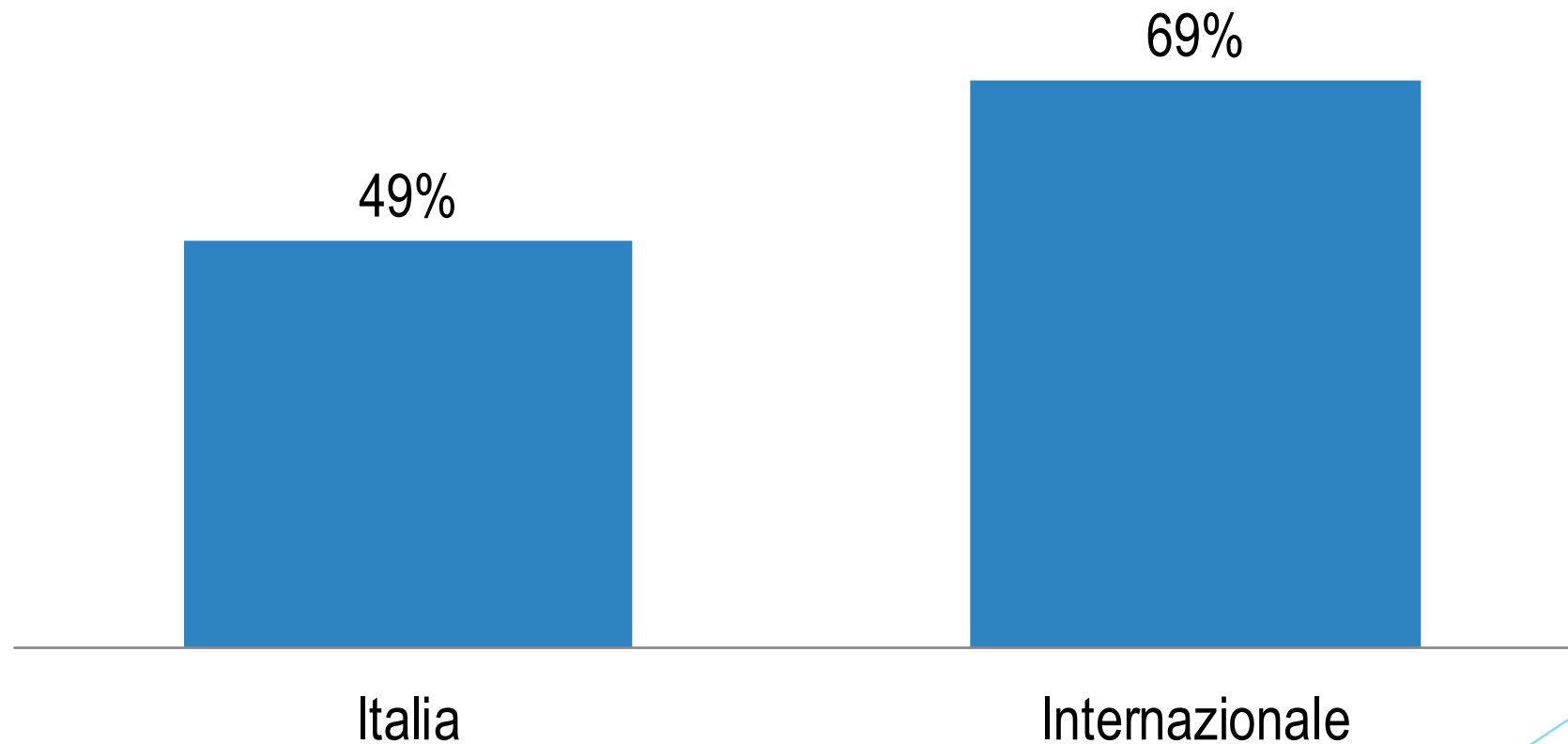
# Experience of competition in HSR

**Mercato Ferroviario Merci Domestico e PIL**  
(anno base 2012 = 100)



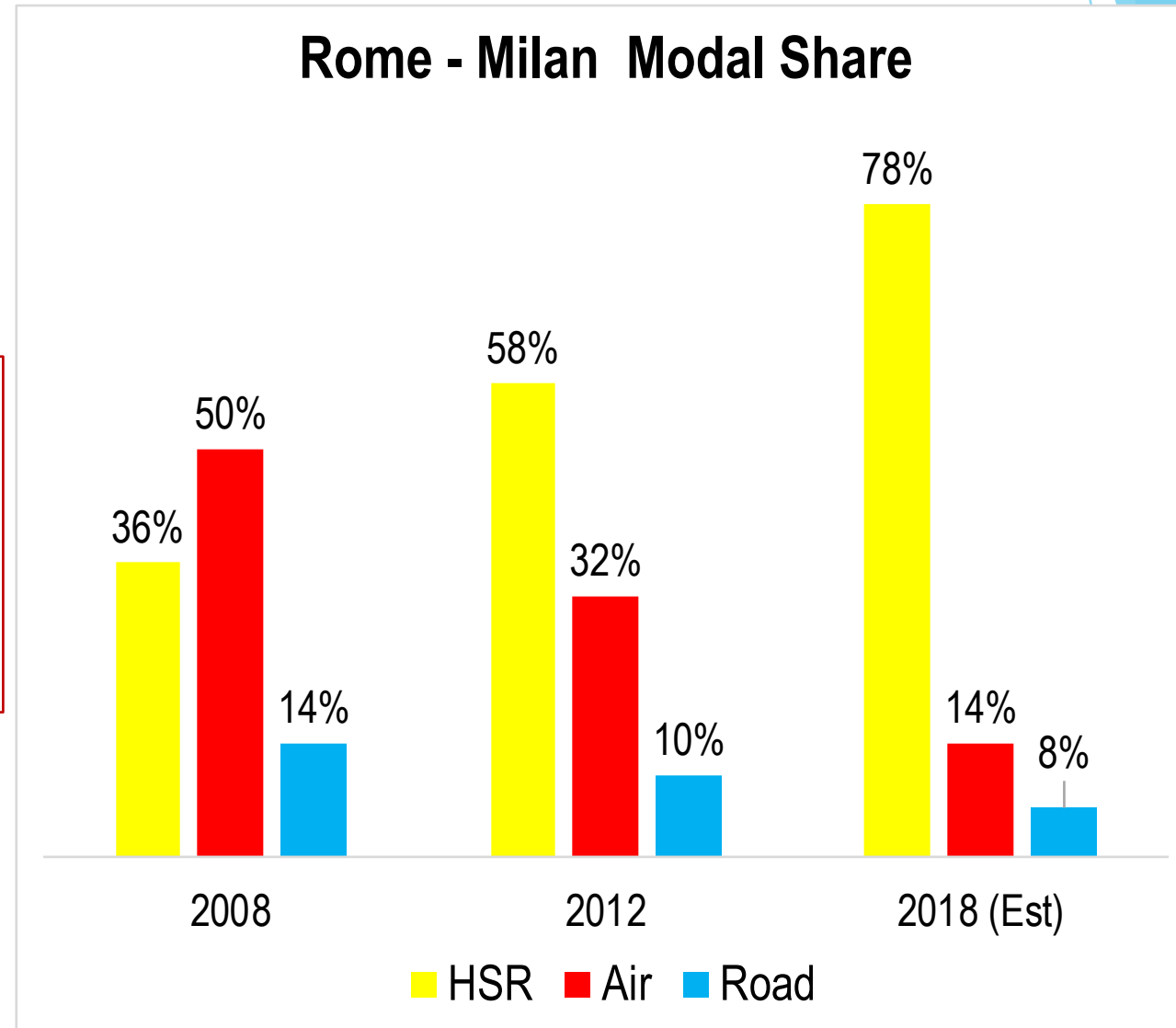
# Experience of competition in HSR

**Quota di mercato nuovi entranti nel mercato  
ferroviario merci**



# Train could be competitive with other transport mode

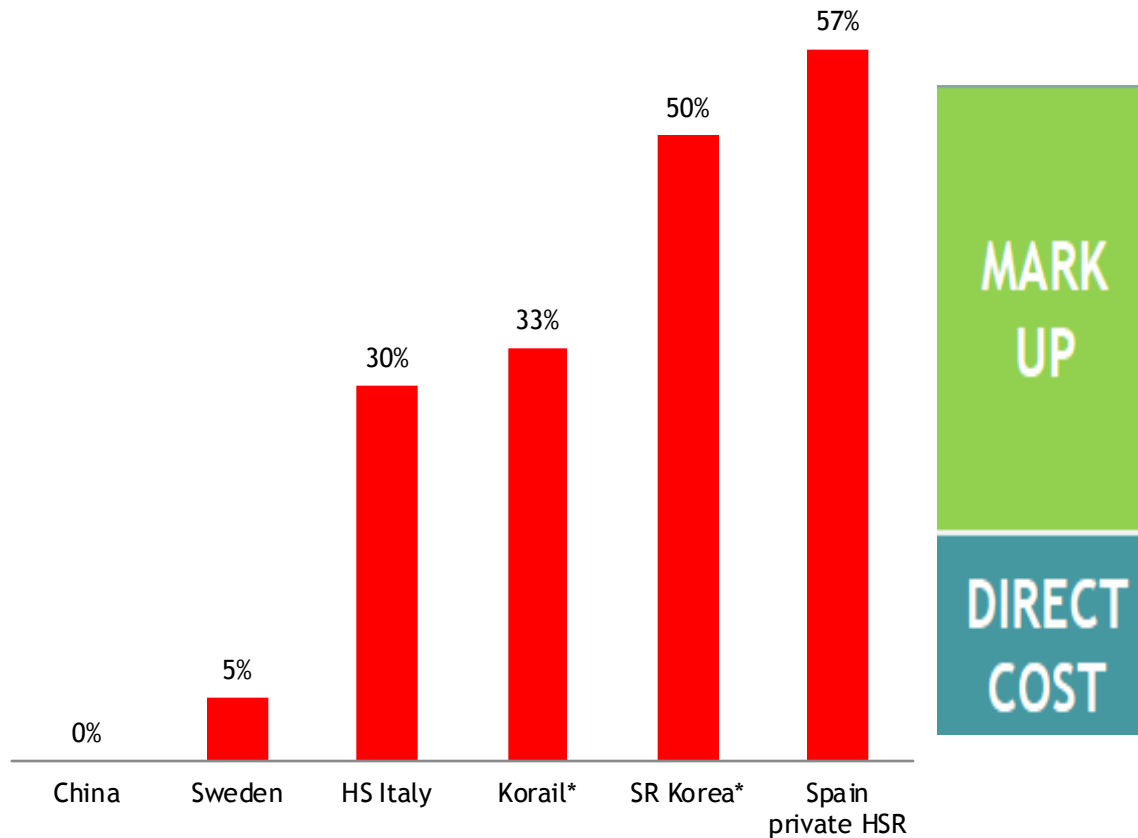
Which kind of regulation?



Source: TRA consulting

# ACCESS CHARGE COST

Access Charge cost on total cost



- Mark up linked to the ABILITY TO PAY

- Direct cost linked to the WEAR AND TEAR

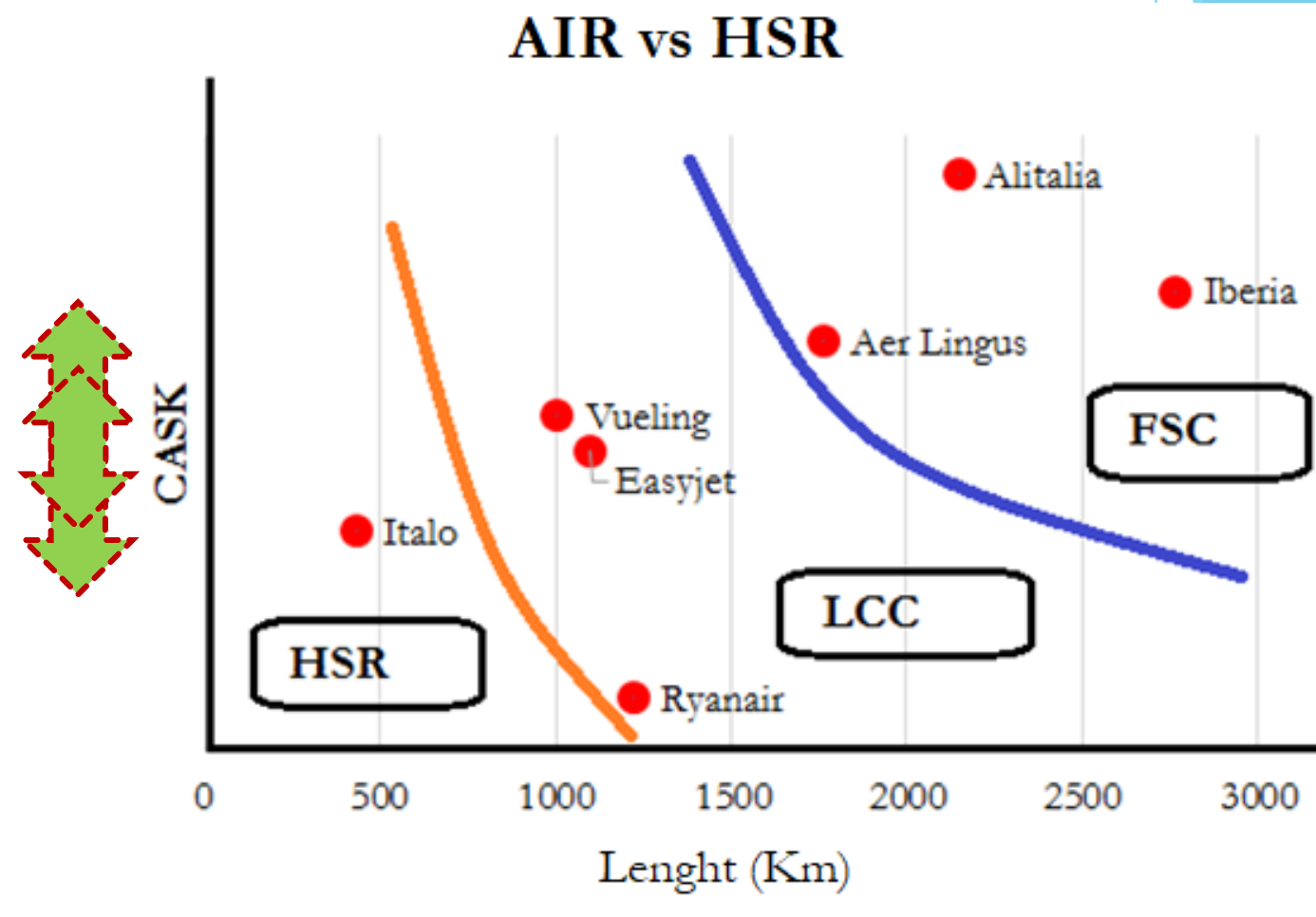


# Reduction of cost

➤ Access charge (from 0% to 60%)

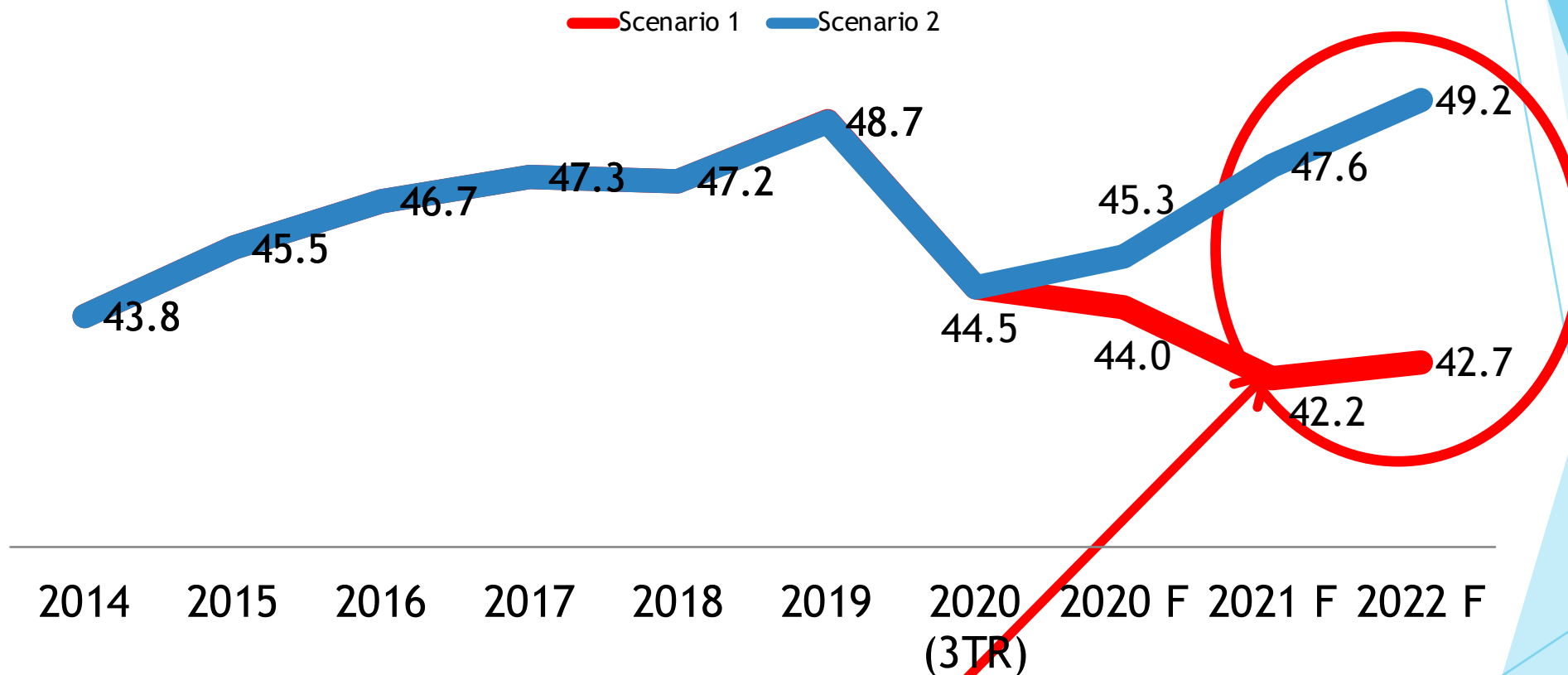
➤ OpEx

- Maintenance contract,
- Optimization of the space on board,
- Running cost,
- IT cost



# Il traffico ferroviario merci in Italia

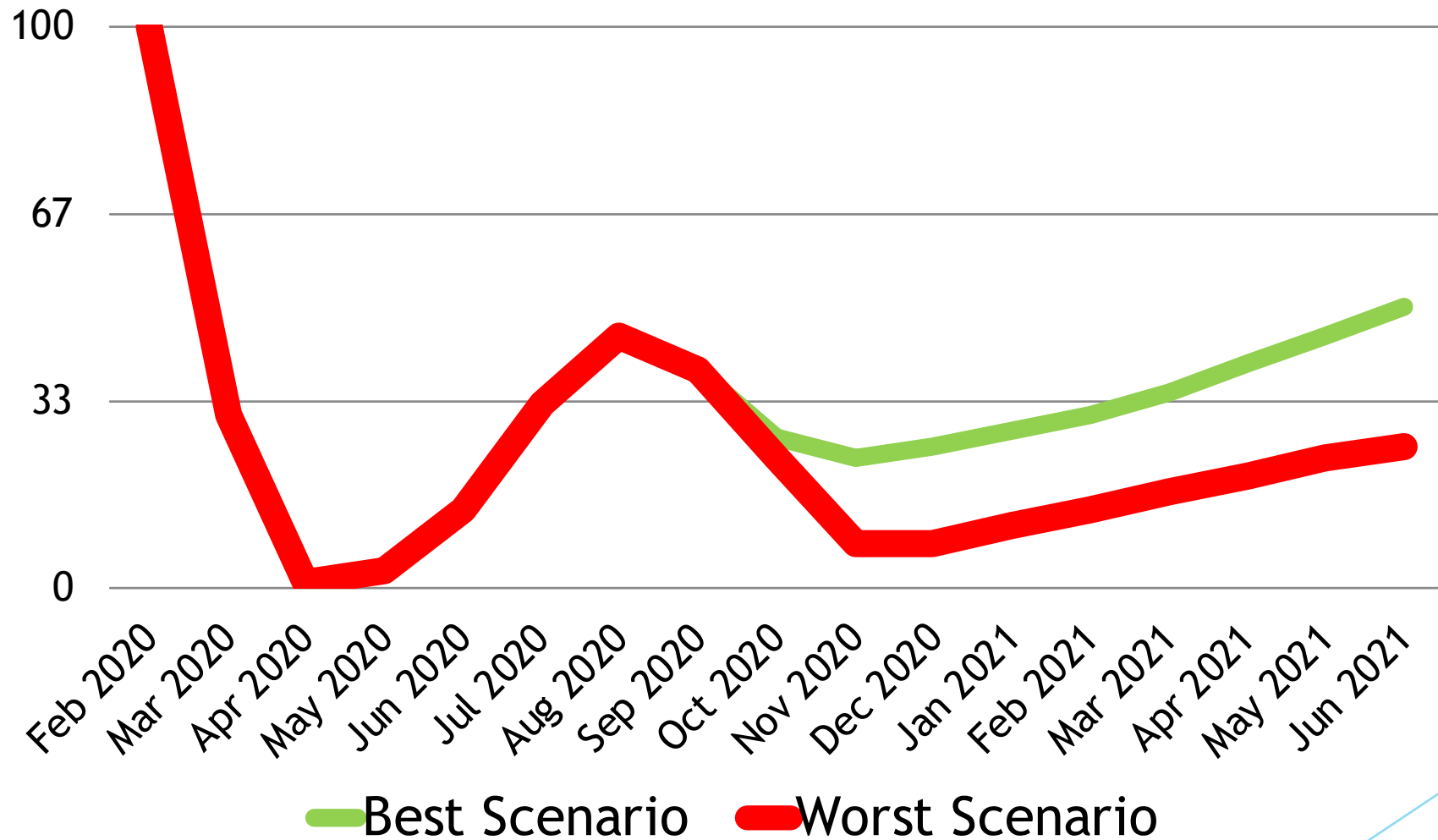
## Scenari di traffico



Quale impatto di lungo periodo dopo  
il covid19?

# HSR in Italy

## Traffic estimation in Italy: Covid 19 Impact



# THANK YOU FOR YOUR ATTENTION

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