

# Freight

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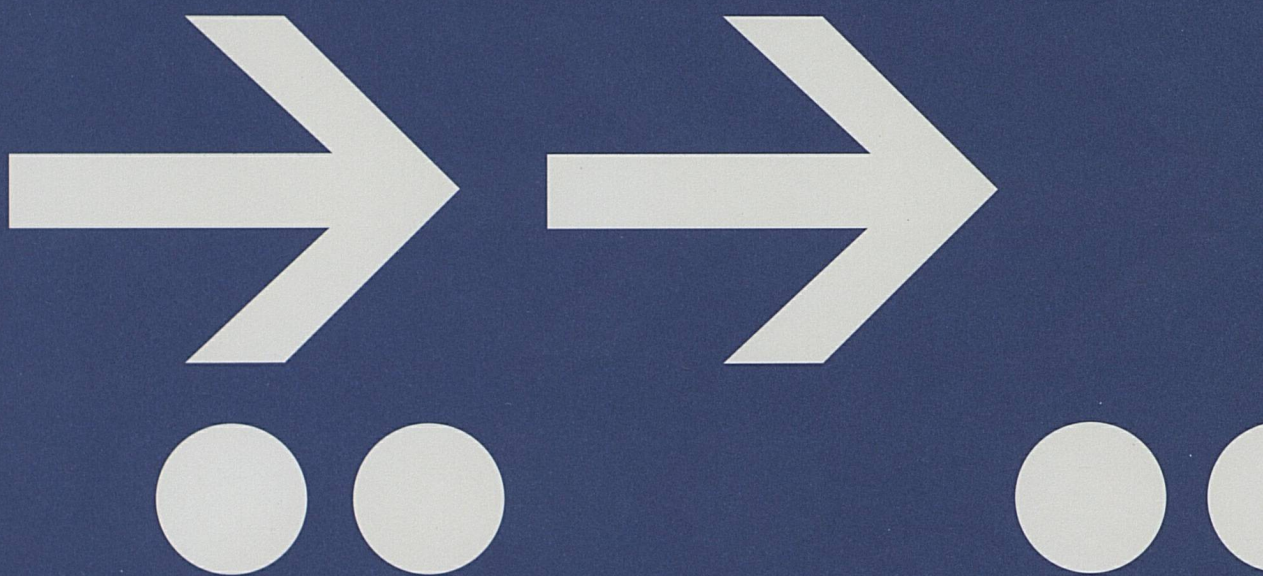
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# Freight

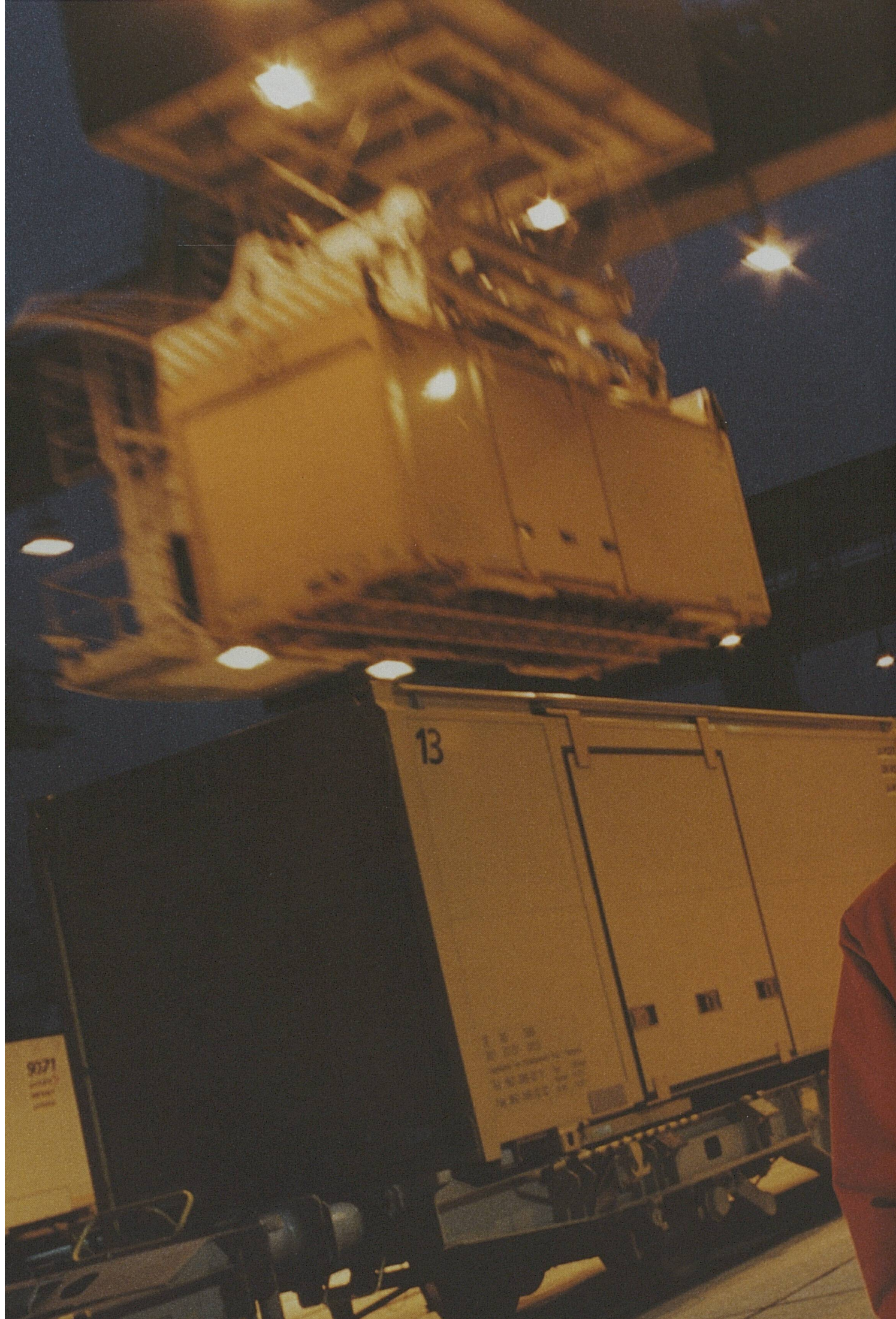






# We relieve.

Peak traffic in the Rhine harbour of Birsfelden. The locomotive is coupled to a long line of oil tank wagons. The oil train then starts its journey to one of the numerous tank farms all around Switzerland. This transport can be effected on the railway safely and efficiently; road and environment are thus relieved.





# We distribute.

The new logistics for mail parcels relies on the railway. Late evening, the yellow parcel-containers are transported in fast goods trains between the sorting centres. There, the containers are unloaded and reloaded with the newly sorted parcels. Part of the reloaded containers are reforwarded by railway immediately. The future-oriented logistics solution of "Die Post" makes use of the speed and reliability of the railway with transports between its sorting centres. Short-haul transports and fine distribution are effected on the road.

## Freight

In 1999, SBB Cargo has gone through an eventful as well as successful year. In terms of transported tonnes, a new record was achieved, and the same applies to tonne-km. The new intra-modal competition on Swiss railways has not made itself felt strongly yet.

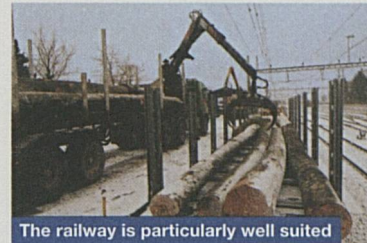
The dynamism of change has been even greater at SBB Cargo than at other divisions. The bigger autonomy of Freight as a division has been conceived from the start as an intermediate step only. As from the beginning of the year 2001 already, SBB Cargo shall be released into independence as a limited company, so it can later be integrated into the Joint Venture with the Italian State Railways FS.

Seen these challenges, the decision of the division manager Ken Bloch Sørensen to leave the company again in autumn, for family reasons, was all the more regretted. Fortunately, a new division manager could be found in the person of Per Utnegaard who brings the necessary international experience for this demanding task.

### Record figures

Both in regard to number of transported tonnes (57.3 million), and tonne-km (9797 million), new record figures could be registered. Because also the performances of the private railways that are mandated by the SBB, are newly included, these figures cannot directly be compared to those of the previous year. Adjusted by arithmetic displacements, a growth of 2.7% results for the performances in tonne-km, and an increase of 9.6% even for the volume in tonnes. The difference in the increase of volumes and performances can be explained by the more than proportional growth of domestic traffic with relatively short distances.

Traffic income amounted to CHF 1012.5 million, an increase of 3%, after adjustment of arithmetic effects. The price collapse of the last years has not continued in the same measure, but pressure on prices remains high.



The railway is particularly well suited for transport of timber.

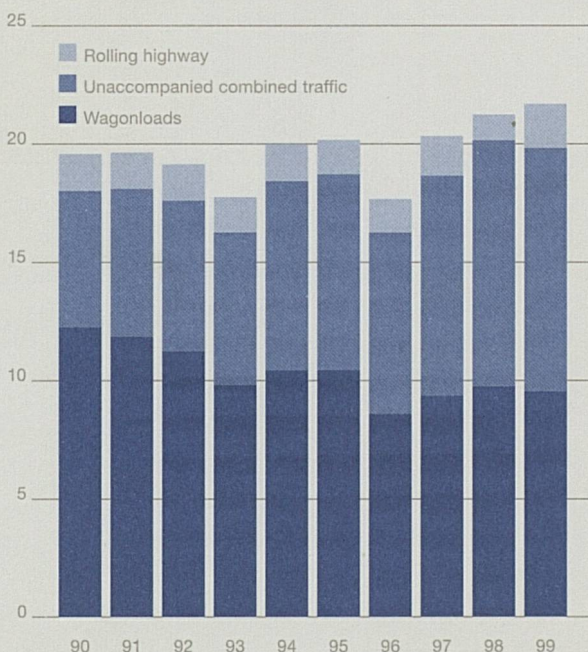
### Growth in domestic traffic

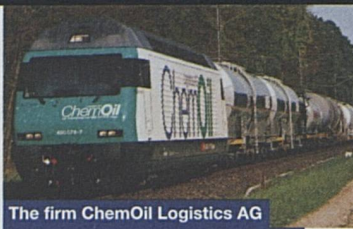
Out of the total growth in volume of 5,9 million tonnes, nearly 5 million tonnes stem from domestic traffic alone. This increase is due to the generally good internal economic situation and to the increase of "heavy" transports in traffic to and from construction sites.

Unlike domestic traffic, cross-border traffic with wagonloads decreased slightly. Import/export traffic however fell from 11.53 to 11.05 million tonnes. Transit wagonload traffic with 8.37 million tonnes practically remained on the previous year's level. In the first half of the year, a slight decrease was noticed, which however was less pronounced than at the neighbouring railways. In the second half of the year, transit traffic showed a noticeable recovery.

However, combined traffic registered a growth of just two percent to reach 14.65 million tonnes. The share of combined traffic in the total tonnage thus amounts to 26%.

### Transalpine railfreight (in million tonnes)





The firm ChemOil Logistics AG brings transports of chemicals and mineral oil to the railway.

In the break-up by branches of industry, no uniform tendency can be made out in 1999. The important thing was that decreases in specific branches could be more than compensated by increases in others. The greatest increase in volumes could be achieved in the construction industry, especially with transports of excavation materials from major construction sites. Also the wood and paper industry showed a growth. The transports of wood chips to Italy could be doubled, and new transports of wood in traffic with France and Italy could be won.

Transport of mail performed well, although a decrease had been budgeted. Because the three new parcel sorting centres could not be taken into service to the extent as planned, the transport logistics set up for them had to be changed at short notice, which meant additional business for the railway. On the part of the SBB, the new, future-oriented solution with parcel transport in swap bodies between the big distribution centres functioned perfectly.

### Build-up of own production

Like the other SBB divisions, SBB Cargo in 1999 also built up its own production completely new. The vehicle inspectors, the shunting staff and the locomotive drivers were attributed to the divisions Cargo and Passenger Traffic. In the course of the year, the workforce of SBB Cargo rose to a number of around 3700.

To be able to stand the ground in the fierce competition from road transport, all possibilities to increase productivity must be used. To do this, new projects were launched, swiftly to be put into practice. It becomes evident that in a result-oriented division, the market impulses have a more direct impact on production and its costs.

### Set-up of Branch Marketing

By tradition, marketing in freight transport was focussed on geography and the production system. Market segmentation was done either according to the criteria inland, transit or import/export traffic, or by differentiation between wagonload and combined traffic. The new organisation of SBB Cargo however orients itself on business branches. The logistic needs of each branch are treated as a whole in order to be able to offer dedicated solutions to the clients.

In order to make better use of the potential of the transport markets in the fields of chemicals and mineral oil, SBB Cargo, together with the German Transpetrol GmbH, founded the common subsidiary ChemOil Logistics AG. The company with headquarters in Basel offers new comprehensive solutions in Europe-wide logistics for chemicals and mineral oil. In the medium term, it shall thus increase the market share of rail in these markets.

The logistic needs of each business branch  
are treated as a whole.



## Competition and partnerships

At the beginning of 1999, network access in domestic railfreight was introduced. Each railway company that meets the conditions set by the law, is entitled to use the infrastructure of another company. Intra-modal competition has started in 1999, albeit as yet to a modest extent. On one hand this is due to the fact that in Switzerland, only a few companies have been active in this market until now, and due to the precarious income situation, scarcely any new competitors want to enter it. On the other hand, the opening so far has been confined to the Swiss domestic market only, as the big competitors from the EU were still excluded.

The limited extent of competition however is in part also due to wagonload traffic with its big marshalling yards being a complex system for which one operator has to assume overall responsibility. According to the performance agreement with the Federal Government, the SBB is obliged to assume this task. Also because of its structure, it is the only one eligible. As a consequence of the liberalisation of the market, all concerned are increasingly looking for transport assignments that can be taken out of the system and be operated as trainload traffic.

Most wagonload transports are effected, as until now, in cooperation with the respective private railways, concerned with the start or end portion of a transport. These railways newly perform by mandate of the SBB and by contractual regulation. When negotiating these contracts, attention was in fact given to cost reductions, but also the situation of the partners was taken into account. It is only on the network of the Mittelthurgaubahn that the SBB itself assumes the execution of the transports, for reasons of costs.

In the field of attractive trainload traffic, the new possibility of competition had already triggered a considerable pressure on prices during the time the railway reform was in preparation. In the other areas of railfreight, consequences of liberalization are not perceptible in regard to prices, because road haulage as a fierce competitor has already been exerting a strong pressure on prices for a long time. Therefore no monopoly profits had to be distributed newly.

With the entry into force of the bilateral contracts with the EU, expected for 2001, market liberalization will be extended to beyond the borders. Although this opening will in a first period at least, be subjected to the rather restrictive legislation of the EU, an increased competition is to be expected. SBB Cargo prepares itself for network access in other countries mainly through the Joint Venture with the FS.



## Heading for the Joint-Venture FS/SBB

Already since 1997, the SBB has aligned its strategy in freight traffic along a close cooperation with the Italian FS in order to jointly exploit the opportunities on the European market. Although the development of railway policy in the EU proceeds slower than expected a few years ago, the dissolution of the traditional territorial monopolies of the freight railways is foreseeable. As a comparably small freight railway, SBB Cargo has little chance of survival in the European market if it stands alone. In this situation, the freight subsidiary of the Italian FS was the ideal partner for SBB Cargo. For both companies, the European north-south traffic plays an important role. Access to the Italian transport market is of special significance also in regard to its sheer size and potential.

In 1999, both the FS and the SBB were occupied with the re-alignment of their company structures, which is not least a pre-condition for the successful merger of their respective freight businesses. Since autumn 1999, both enterprises have comparable structures. Subsequently, the negotiations could be pushed ahead, and on 2nd February 2000, the contract for the Joint Venture was signed.

## With the planned Joint Venture, the SBB testifies to its will to play an important role in the European transport market.

At the beginning of 2001, the employees of SBB Freight Traffic shall at first be transferred to the new SBB Cargo AG, and later to the Joint Venture. With the Swiss trade unions, an agreement could be reached.

With the planned merger of its freight operation with that of the FS, the SBB testifies to its will to play an important role in the European transport market. The Joint Venture SBB/FS shall be one of the major co-players in Europe. The new company will make it possible to open up new potentials and to use synergies, both in regard to the market and to production. The Joint Venture is a project of growth for the railways concerned, with which they want to increase their market share as against other transport modes. The project therefore is also in line with the objectives of Federal transport policy to shift long-distance freight to the railway mode as much as possible.

### **Client Service Center in the build-up process**

One of the biggest projects of SBB Cargo is the new Client Service Center (KSC) in Fribourg. It was built up during the year under review, and will be taken into service in a phased way from spring 2000. It has the latest communication equipment and shall be accessible to clients around the clock for all information and services. The client service function will, despite centralization, retain its nearness to the clients. All field services of SBB Cargo (e.g. shunting teams) shall be directly connected to the KSC. The communication system of the new centre that makes it all possible, is supplied by "Lufthansa Systems", after the contract had been put to tender on a European scale.

The need for an improvement of the customer service emerged also from a survey among clients, carried out by a market research institute. 21 key clients were interviewed personally, and 257 clients were contacted on the telephone. On the whole, SBB Cargo's performances were given quite good marks.

To improve and facilitate client information, SBB Cargo has already for a long time made use of performing information tools. Already in 1999, an increasing number of clients benefitted from the possibility to receive their monthly accounts per Internet. Another service, the direct connection with the Cargo Information System, is the CIS-Online. With this tool, the client is in contact with SBB-Cargo from the placing of the order via the tracking until arrival of the shipments at the destination, and gets the necessary information easily and directly. Already over 350 clients make use of this service and have their access code. The freight timetable is accessible to the public on the Internet under [www.sbb.ch](http://www.sbb.ch) and is consulted very often. Since the end of 1999, the electronic accounting system CIS2 has been taken into service step by step.

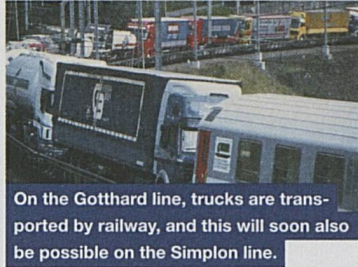
The system EDIFACT (electronic data exchange) meets a great interest, particularly with major clients. Important clients from the business branches mineral oil, chemicals, cement, steel or mail, electronically transmit their orders. A transport order at the same time books the withdrawal from stocks in their stock record.

## The challenge of the Land Transport Agreement

In the course of 1998, the public vote on the performance-related heavy-lorry tax, and the conclusion of the bilateral negotiations with the EU settled important issues of the future basic conditions for railfreight traffic. In 1999, the internal political underpinning of the contracts, in particular the agreement on land transport were widely discussed. The SBB thereby took a clear stance, based on the following points:

- The SBB's long-term objective is to arrive at a railfreight whose productivity is such that it can do without subsidy.
- In the time of transition until full application of the bilateral agreement, with 40 t contingents and a low heavy-lorry tax, the railways depend on financial support in order to reach the ambitious goals of the Federal Government of shifting traffic from road to rail.

In the course of the deliberations of the related measures to the EU agreements, the parliament has passed clear decisions. Their implementation however is not yet appropriately defined. The important part is, that with public means, no market distortions between the different railfreight segments are created. The most simple and best solution would be a reduction of train path prices, as evenly as possible applied to combined and to wagonload traffic, the difference being borne by the government.



On the Gotthard line, trucks are transported by railway, and this will soon also be possible on the Simplon line.

## New solutions in Combined Traffic

In May 1999, the Federal Government awarded the contract for the operation of the rolling highway on the Lötschberg-Simplon axis to a consortium of SBB, BLS and HUPAC. With this, the government honoured the efforts to reduce operating costs, in which also foreign railways had been involved. The transport of entire lorries between Freiburg/Breisgau and Novara shall be launched in early 2001, at first with seven daily trains in both directions. This however on condition that the widening of the loading gauge on the Italian side of the Simplon is terminated by then. The new offer fulfills an obligation Switzerland has entered into with the transit agreement in 1992.

In 2000, SBB Cargo will fire the starting shot for a new system of domestic services of combined traffic. With this, it complies with the wishes of many clients, but will also meet expectations of political circles and private initiators. In the face of the generally weak profit situation in combined traffic, and the short distances in Switzerland, this venture is not without risk. The chances lie in overnight transport, and in the congestion of many national highways. SBB Cargo will act as system operator of "Kombi-Verkehr Schweiz" (KLV-CH), the project however is developed in cooperation with other interested railways, road hauliers and clients.

Between the different  
railfreight segments,  
market distortions must not be created.