

The Railway training market is developing steadily. To adjust our market approach accordingly we agreed on an extensive market research. Our market analysis of the worldwide training market with special focus on markets with exceptional invest volumes for infrastructure projects shows a steady growth of the market itself. More and more railway industry tenders are published containing portions of training services even in connection with turnkey projects for railway systems to be newly built and PPP for existing railway systems.

On the other hand, the requirements on the client side are steadily increasing. Pressure on the prices and the demand for flexibility and short-term solutions is growing, while the expectations concerning the quality of the training remain high as ever.

These findings are our motivation to think into changing our market approach completely. DB's current production model is the "fly-in" model, meaning that almost all trainers are based in Germany. To fulfil contractual obligations the trainers either fly to the client's headquarters or the training sessions are organized in Germany. This model has worked well for training topics like SMS/hazard, project management, maintenance processes and general management including official certifications and licensing. The huge benefit of the fly-in-model is that each trainer always has up-to-date information and a high level of quality is ensured. Furthermore DB is often assigned Training tenders because of our hands-on approach towards best practice solutions. Customers value the profit they gain during trainings with our very knowledgeable trainers, learning from first-hand experience. The drawbacks are a relatively high cost-level and a limited ability to offer long-lasting training programs. This makes it difficult to operate, especially in the strongly-growing market of vocational education.

To face these challenges we are currently in the process of developing new product ideas to satisfy market needs. One of the product ideas is what we call "DB Rail Academy", an active market approach to provide high quality education, whose production models can be adapted according to market size, demand and budget.

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