

2011

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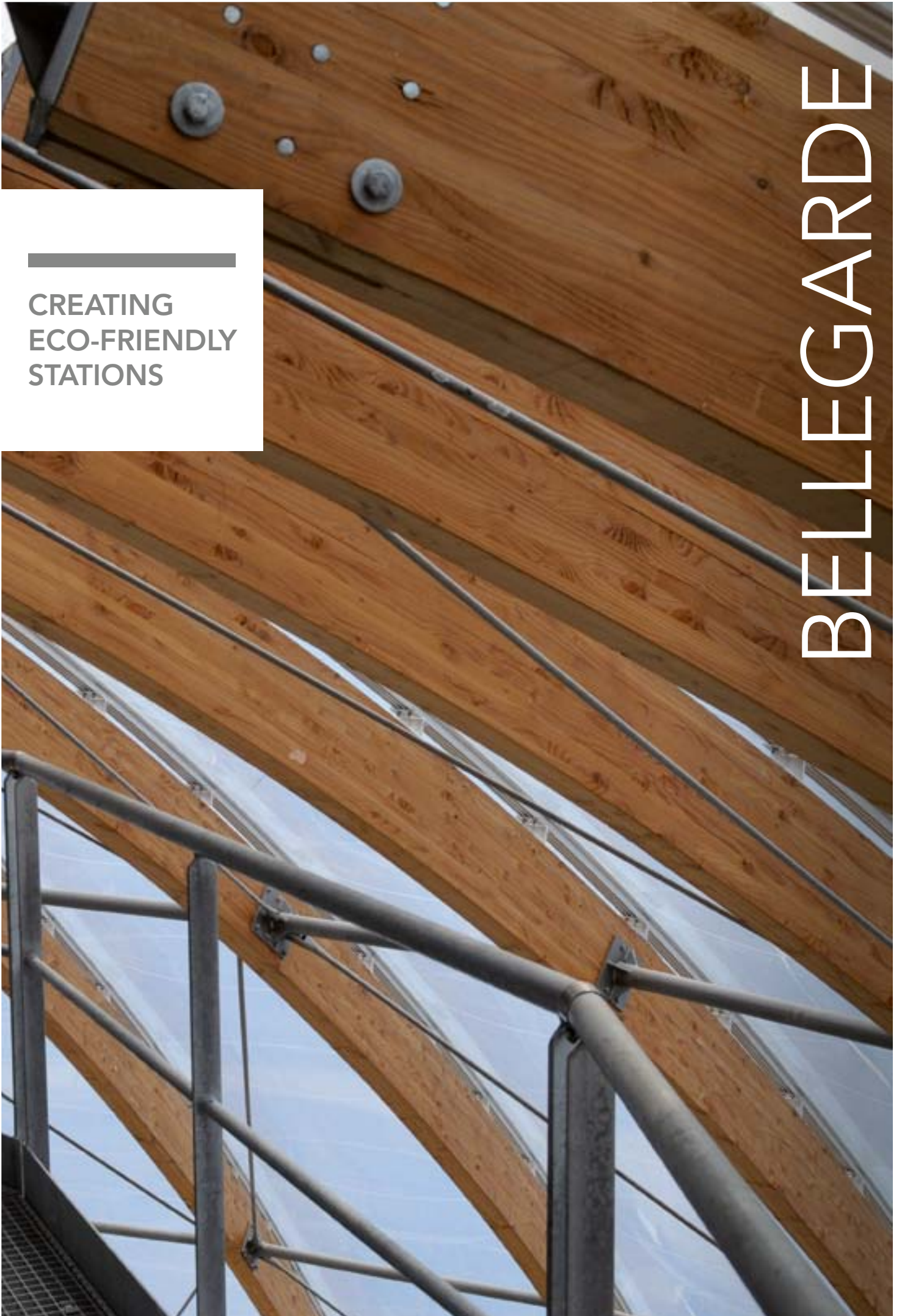


**INVENTING
THE STATIONS
OF THE FUTURE**
BUSTLING HUBS
OF URBAN LIFE

ACTIVITY REPORT

CREATING
ECO-FRIENDLY
STATIONS

BELLE GARDE



PARIS-SAINT-LAZARE

DEVELOPING
RETAIL AREAS
TO MEET
PASSENGER
NEEDS



A photograph of a stone archway in a station, with a wooden bench in the foreground and sunlight streaming through the arches. The arches are made of large, light-colored stone blocks. The floor is a checkered tile pattern. The lighting is dramatic, with strong shadows and highlights from the sunlight.

NÎMES

BRINGING
STATIONS
AND THEIR
SURROUNDINGS
TO LIFE

INNOVATING TO
MAKE THE STATIONS
OF TOMORROW—
EFFICIENT,
MULTIMODAL,
AND WELCOMING

BELFORT-MONTBÉLIARD



PARIS-LYON

**IMPROVING
ACCESS AND
PASSENGER
FLOW**

REINVENTING
THE STATION
AS AN EXCITING
PLACE TO BE

BESANÇON





10/

SNCF'S 5TH DIVISION 3 YEARS ON

- 11/ Goals and operations
- 11/ Key figures
- 12/ 2011 highlights
- 14/ Management structure
- 17/ Human resources

26/

MODERNIZING STATIONS

- 27/ Delivered in 2011
- 28/ Renovation projects
- 32/ A new generation of eco-friendly stations
- 35/ Stations are windows on the world
- 38/ Investment programme overview



18/

DEVELOPING PASSENGER SERVICES

- 19/ An intermodal hub
- 21/ The right information in the right place
- 22/ More and more services
- 24/ Service quality review

40/

NEW GOVERNANCE FOR STATIONS

- 41/ New model of governance
- 41/ Development of project partnerships
- 42/ Dialogue on issues involving stations

44/

2011 FINANCIAL STATEMENTS

- 45/ Gares & Connexions financial highlights
- 45/ Gares & Connexions financial statements
- 47/ Compendium of legal and statutory texts—Opinions and decisions of ARAF



"STATION MANAGEMENT IS AN INTEGRAL PART OF THE MOBILITY CHAIN"



FORWARD

What were your key areas of progress in 2011?

The last 12 months have been excellent, but I see four highlights:

- the emphasis on service quality, with the first Caligare certifications in June. Station-specific customer satisfaction surveys now give us an efficient tool to assess our performance and set future goals. Over 60 stations received Caligare certification in 2011;
- the gathering pace of our innovation policy for in-station shops and services, with the introduction of the first Boutiques du Quotidien; a partnership signed with Regus (world leader in flexible work spaces) to create business centres in our largest stations; and an agreement with Kiala (a European network of package collection points) on the development of in-station parcel drop-off and pick-up points;
- the arrival of thello, a new passenger operator on the French network, on the Paris-Milan-Venice line. Thanks to the commitment of our teams on the ground, we have shown that we can accommodate SNCF and thello trains with an equal level of professionalism;
- finally, the completion of major construction and renovation projects on schedule: our two new Rhin-Rhône TGV stations in Belfort-Montbéliard and Besançon Franche-Comté, and, of course, the Paris-Saint-Lazare and Paris-Lyon stations.

What role will Gares & Connexions play in the new railway system?

Last autumn's national summit on the future of French rail transport (Assises du ferroviaire) showed that the French railway system is in need of wide-ranging reform, both in terms of operational management of the network and the financing of the system.

I note that these discussions had little to say on the management of passenger stations, perhaps because the creation of Gares & Connexions with a business model defined by the French decree of 20 January 2012 has already clarified

this area, in line with "Contemporary Stations", Senator Keller's report to the Prime Minister in March 2009. One thing is sure: there is no longer any doubt that station management is an integral part of the mobility chain, with a significant property component. It is related to passenger transport and is fundamentally different from railway network management. And it is right that it should remain operationally connected to transport activities in the new railway system now taking shape.

What are your challenges for 2012?

We have three priorities for the coming year:

- continuing to improve service quality, especially in the Paris region—home to two-thirds of railway transport users—working closely with the regional transport commissioning authorities;
- developing and implementing new services that help make the most of the daily commute, and transform stations into bustling centres of urban life;
- continuing our existing investment programme to modernize and develop our stations.

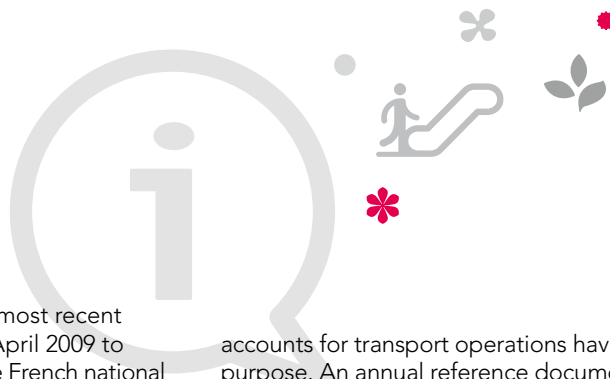
Our business model has now been confirmed, but remains vulnerable. Given the level of investment required by the condition of our property and traffic growth, we will need to increase our financing capacity by around 25% in the next few years. Renovating, modernizing and developing stations requires significant amounts of capital—funds that public and private stakeholders in railway transport do not necessarily have. We will seek to give ourselves the flexibility we need, first by developing new service activities and streamlining our property holdings. We have the advantage of working in a fast-moving business that is changing all the time. And I am confident that we will succeed.

SOPHIE BOISSARD,
Managing Director, Gares & Connexions



SNCF'S 5TH DIVISION 3 YEARS ON





1/ GOALS AND OPERATIONS

Gares & Connexions is the fifth and most recent of SNCF's divisions, created on 7 April 2009 to operate, renovate and develop the French national rail network's more than 3,000 passenger stations. We face a double challenge—modernize stations to bring life to French regions and make public transport more appealing; and open up international passenger services to competition in France, in accordance with European directives.

Gares & Connexions' mission was set by the French Act of 8 December 2009 and its implementing decree of 20 January 2012. Gares & Connexions is committed to providing all railway operators and their customers with fair and transparent access to facilities and station services. Management of Gares & Connexions must be transparent, non-discriminatory and fair; separate

accounts for transport operations have been set up for this purpose. An annual reference document—the Stations Reference Document (DRG)—drawn up after consultation with our main partners, defines services offered and pricing guidelines. Gares & Connexions' management activity is monitored by the French railway regulatory authority ARAF.

Gares & Connexions' mission includes responsibility for station investment projects in collaboration with local authorities, transport operators and institutional partners. Its two main priorities are improving services and making better use of station space. With one objective: make the French network's 3,029 stations pleasant and functional places for passengers, rail companies, private and public partners.

2/ GARES & CONNEXIONS—KEY FIGURES



3,029

passenger stations in the French rail network

383

stations and stops in the Transilien network



2 billion

passengers use our stations every year

Nearly **3 million**

passengers use the Greater Paris network every day



2 million

sq m of passenger and sales space, retail areas, offices and more

IN 2011

€1.166 billion

in revenue

€180.7 million

invested in station modernization of which:

• €145.6 million

equity-financed by SNCF, including €11 million in working capital requirement. The rest came from direct investment by Transport Commissioning Authorities, local/municipal authorities and other partners.

• 250

station investment projects were monitored in partnership

• 68 out of 364 stations

obtained Caligare certification

• 1,742

staff work for Gares & Connexions, including subsidiaries



3/ 2011 HIGHLIGHTS

Stations decree takes effect

The stations decree referred to in the French Act of 8 December 2009 pertaining to rail transport organization and regulation (ORTF) was issued on 20 January 2012. It specifies the legal framework applicable to the Gares & Connexions division within SNCF, sets out the station management business model, and creates regional governance bodies for all main stations.

In addition to other important points, the decree lists regulated services SNCF must provide to railway companies as part of the services infrastructure, including reception, passenger information, fuel supplies, and access to storage and maintenance areas. Pricing of services is the subject of a complete legal framework set out in the stations business model. Finally, the decree states that SNCF must produce a code of conduct defining the confidentiality rules applying to staff responsible for station services. This code, submitted to the French railway regulatory authority (ARAF) for comment, should be published at the end of 2012.

Two French passenger stations welcome a new railway company

On 11 December 2011, thello, a new rail passenger service operator, ran its first trains in France on the Paris-Venice line. Thello was founded by Trenitalia, the Italian public rail operator, and Veolia Transdev, and offers a daily return journey from Paris to Venice by night train.

The directives governing the opening up of international passenger services to competition state that all railway companies have the right to access certain infrastructures and services classified as "essential facilities", including passenger stations. In accordance with the French decree of 20 January 2012, thello can therefore access various services in the Paris-Lyon and Dijon stations under the same conditions as other railway operators: provision of premises for its commercial and operational activities, access to all basic station services (areas, facilities, equipment, train announcements and information display panels, passenger reception, etc.).

ARAF's initial opinions and decisions

ARAF, the French railway regulatory authority, was created by the Act of 8 December 2009 and began operation in December 2010. Endowed with investigative powers similar to those of the French competition authority, it oversees in particular steps towards separating functions and accounts to guarantee all operators equal access to stations and services. ARAF is consulted on all statutory texts, including pricing guidelines.

Gares & Connexions submitted its rules for separate accounting applied since 1 January 2010 to ARAF for approval. In an interim opinion issued in September 2011, ARAF asked SNCF to make a number of changes to the proposed rules. Meeting on 16 February 2012, SNCF's Board of Directors recapitalized Gares & Connexions in an amount of €270 million. ARAF's final decision is expected some time in 2012.

ARAF also issued an opinion on the Stations section of the Network Reference Document.



Rhin-Rhône: a new generation of stations

In December 2011, the Besançon Franche-Comté TGV and Belfort-Montbéliard TGV stations were inaugurated, along with the first section of the Rhin-Rhône high-speed line. These two new stations are at the heart of a European system linking French regions to other countries without going through Paris: from Strasbourg, Germany and Switzerland in the north to Lyon, Marseille and Montpellier in the south.

Both buildings symbolize a new generation of stations and are remarkable on several counts: they involved a model partnership with key local players for regional development, Gares & Connexions used all its expertise to maximize the quality of passenger care, and priority was given to intermodality and respect for the environment. As a result, Besançon Franche-Comté TGV station received both High Environmental Quality (HQE®) and Low Energy Consumption Building (BBC Effinergie®) certification while under construction—a first for a European station.

Les Boutiques du Quotidien

In late 2012, Gares & Connexions plans to launch a new retail concept adapted to commuter stations. Designed to replace outmoded station restaurants, La Boutique du Quotidien will bring together food, newspapers, magazines, books and other convenient services such as parcel pick-up, a concierge service and essentials at competitive prices—all in a single area. Inspired by concepts already developed in Switzerland, Germany and the Benelux, this initiative aims to make life easier for passengers who use public transport regularly for their daily commute. It will also serve the needs of local residents.

A call for tender was launched in March 2011, with a view to selecting one or more partners to develop this new concept in French stations.

Four bids were selected:

- Relay France, in partnership with Casino
- Servex France, in partnership with Monoprix
- SSP France, in partnership with WH Smith
- Eliance

On the basis of these responses, the first shops are scheduled to open starting in late 2012. They will be located in pilot stations with annual passenger traffic of between 500,000 and 3,000,000, and include Aix Ville, Annecy, Dreux, Saint-Quentin en Yvelines and Epinay-Villetaneuse.

The Boutique du Quotidien project fits fully within Gares & Connexions plans to turn stations into bustling hubs of daily life for local residents, passengers and passers-by, at the heart of their own city.

Pilot shops opened in 2011 included Monop'Station. This convenience store concept, both innovative and attractive, brings together sit-down and take-away eating, groceries and essential items. Shops are open seven days a week and meet passengers' daily needs while enhancing the friendly and practical appeal of in-station retail areas.

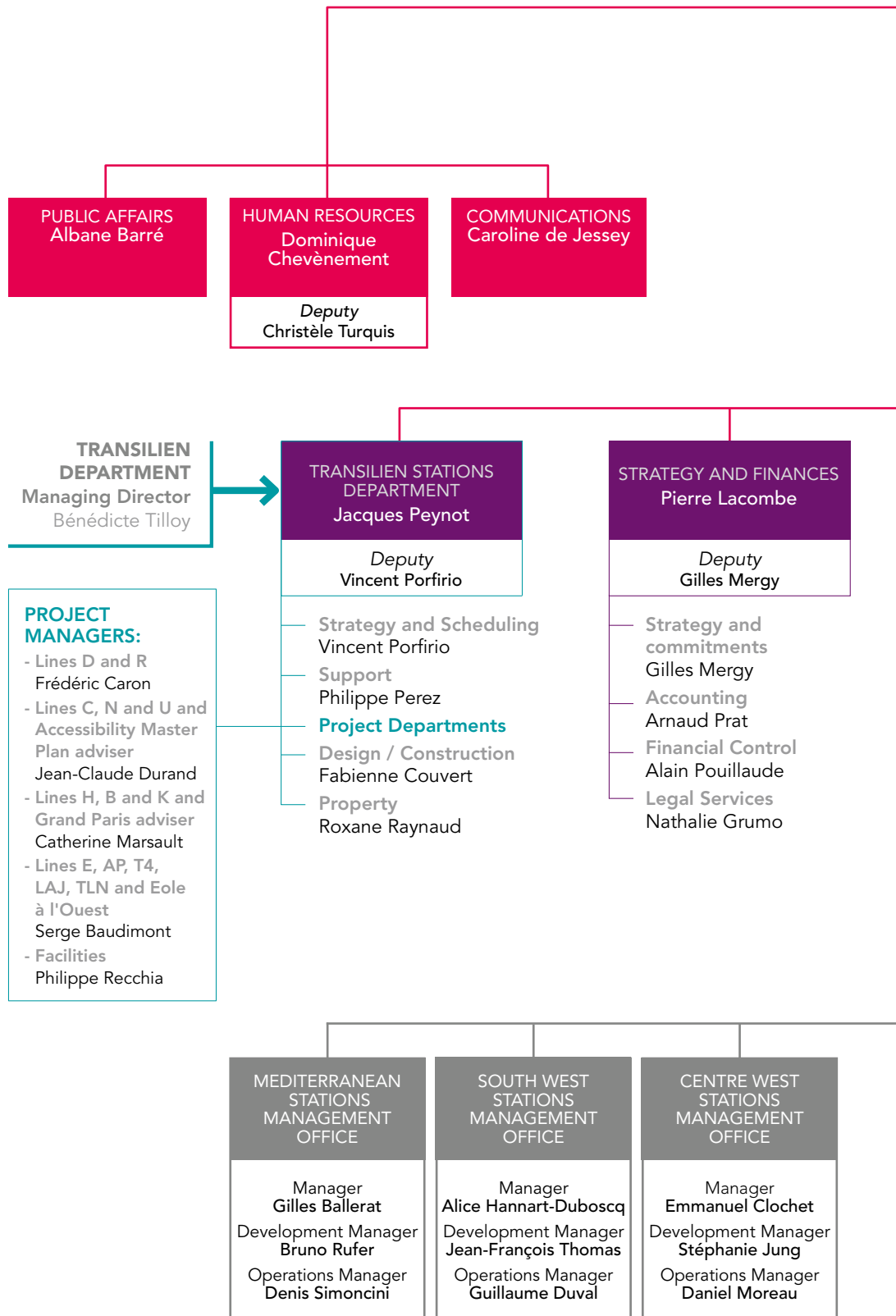
This local shop concept was developed in partnership with the NS (Dutch Railways) marketing subsidiary drawing on the expertise of Servex and Monoprix. Today three stations have a Monop'Station: Chartres, Thionville and Strasbourg, where the concept was officially inaugurated in January 2012.

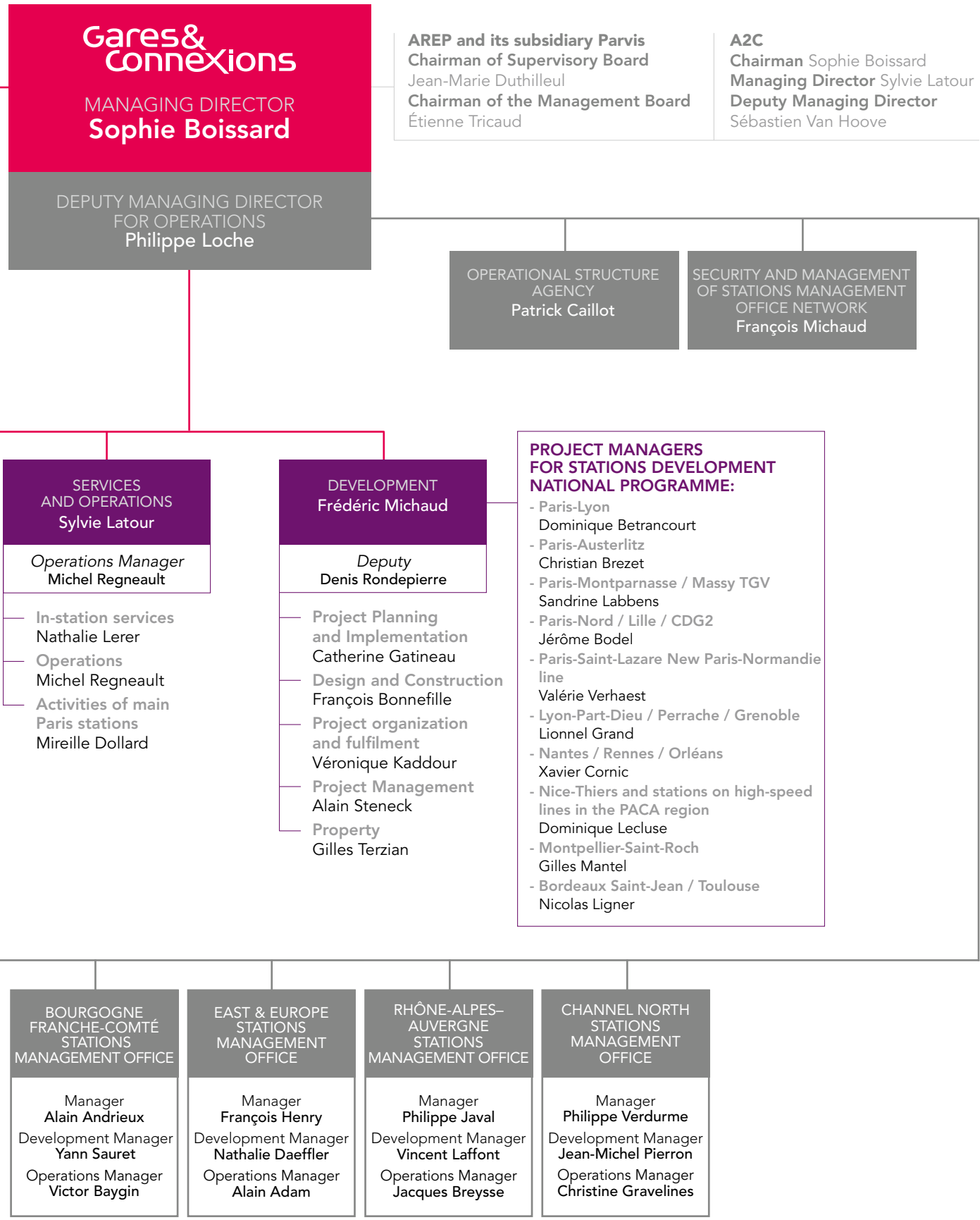
And in Mâcon, Chalon-sur-Saône and the new Besançon Franche-Comté TGV and Belfort-Montbéliard TGV stations, a new concept of multi-purpose shops developed by RELAY is being rolled out. Called Trib's, these incorporate the traditional RELAY range (newspapers, magazines, books) along with a designated restaurant area, bar and self-service snack area. Depending on the station, passengers may also find essentials or regional products in cheerful shops that open onto waiting areas.

This concept and its innovative design is in keeping with the approach to comfort, information and service that is central to all Gares & Connexions projects.

4/ MANAGEMENT STRUCTURE

Organizational chart, March 2012







Gares & Connexions is a clearly identified division of SNCF, a public service group fully owned by the French government. It operates under the authority of the SNCF Chairman and within the remit specified by the Board of Directors. Its managing director is Sophie Boissard.

At the end of 2011, the Gares & Connexions division and its subsidiaries had a combined workforce of 1,742.

Division teams, working directly or through service providers, are responsible for:

- design and construction of railway stations;
- management, development and marketing of railway station property;
- station operations, including reception and services, site and hub management.

Gares & Connexions and its three departments cover the full scope of station activities, from day-to-day management to development projects:

- The Services and Operations Department;
- The Development Department;
- The Strategy and Finance Department.

The Station Management Offices

Seven inter-regional offices are in charge of railway station development projects and operational policies within their geographic jurisdiction. Based in Bordeaux, Dijon, Lille, Lyon, Marseille, Nancy and Rennes, they implement division projects and strategy across the whole of France. As key points of contact with institutional partners in each region, they lead local development projects.

Since February 2012, a specific department for stations served by the Transilien network has been operating in the Paris region under the dual authority of Gares & Connexions and the Transilien Executive Management team. It manages France's densest station network, with 383 stations and stops.

GARES & CONNEXIONS HAS THREE DEPARTMENTS

1/ Services and operations:

- defines and oversees services;
- manages the railway, retail and public areas in each station;
- manages in-station rental contracts and concessions;
- manages buildings and facility maintenance and cleaning policies.

2/ Development:

- produces and maintains an inventory of the division's property assets and works out a promotion strategy;
- leads and manages the 15 projects in the national programme;
- draws up and directs investment based on the collection, analysis and consolidation of information on needs;
- provides expertise and team management throughout the skills chain required for project implementation.

3/ Strategy and Finance:

- oversees implementation of the division's strategic plan;
- provides financial management, produces accounts, and directs financial policy;
- schedules investments over several years and monitors financial commitments;
- supervises all processes associated with regulated services: relationships with third parties, producing the Network Reference Document and pricing framework;
- handles legal issues.

The six main Paris stations (Paris-Austerlitz, Paris-Est, Paris-Lyon, Paris-Montparnasse, Paris-Nord and Paris-Saint-Lazare) are under the direct control of the Gares & Connexions National Management team.

At local level, 38 station managers work within the passenger service organizations responsible for all on-site services to ensure the day-to-day running of the stations. They are responsible for coordinating the transport hub and managing passenger flows as well as site management and the provision of quality passenger information.

Station managers implement in-station services and oversee the integration of stations into the surrounding area. They are also a prime contact for various associates, both internal (service operators, maintenance providers, SNCF regional representatives and regional managers) and external (local authorities, Réseau Ferré de France (RFF), the French government, private partners), for everything relating to station operations in their area. This area can cover anywhere between 1 and 150 stations across a town or region. In addition, 23 Construction and Energy Agencies (ABE) are responsible for specialized maintenance and major renovation works.

Two specialized subsidiaries

AREP is a design office specializing in station construction and renovation, with skills in architecture, urban development, engineering and design. Its expertise has won business in numerous complex urban design projects, both in France and abroad. Through AREP, Gares & Connexions has proposed innovative and effective approaches to accommodating and managing passengers and station comfort. Its subsidiary Parvis assists project owners and directs property development, including cost, quality and deadline control, and legal frameworks.

A2C markets retail areas and contributes to business promotion.

5/ HUMAN RESOURCES

The highly skilled Gares & Connexions workforce, encompassing a wide range of professions, totalled 1,742 by the end of December 2011: 1,248 for the state-owned industrial and commercial enterprise (EPIC), 350 for its subsidiary AREP, 86 for Parvis and 58 for A2C.

The division's overall headcount grew by 13% between 2010 and 2011. The Station Units workforce (part of Passenger Service Organizations or the SNCF Proximités division) showed the strongest growth, as the structure of these units—responsible for production of passenger services—was consolidated. In 2011, 264 new staff joined the division's EPIC unit (EPIC is a state-owned industrial and commercial enterprise), which entailed induction and training programmes.

For the division as a whole, including subsidiaries, managers account for 68% of staff, technicians 19% and execution 13%.

The percentage of female personnel rose slightly from 33.9% in 2010 to 35.6% in 2011, and comes to 41% if subsidiaries are included.

The 51-55 age bracket remains the largest, accounting for 28% of the workforce at the end of 2011.

Positions requiring a high level of expertise, together with a high proportion of new staff and an age pyramid notable for its significant portion of more mature staff, combine to present significant issues and challenges for the division's future growth and renewal of skills.

In 2011, a process of identifying key positions (depending on whether they represent a significant financial burden or require highly specialized skills) was initiated, involving specific support systems (dedicated replacement plans, individual monitoring, more advance preparation for new staff training, etc.).

Professional career paths have also been developed for each job category. Institut Gares, the division's training body, has put in place a wide-ranging skills development programme to meet its strategic challenges.



DEVELOPING PASSENGER SERVICES

Gares & Connexions' primary mission is to improve services for the two billion passengers who pass through our stations every year. In 2011, key issues addressed were information, shops and services, comfort, and ease of switching between modes of transport. Quality control management has also been strengthened with a station certification scheme.



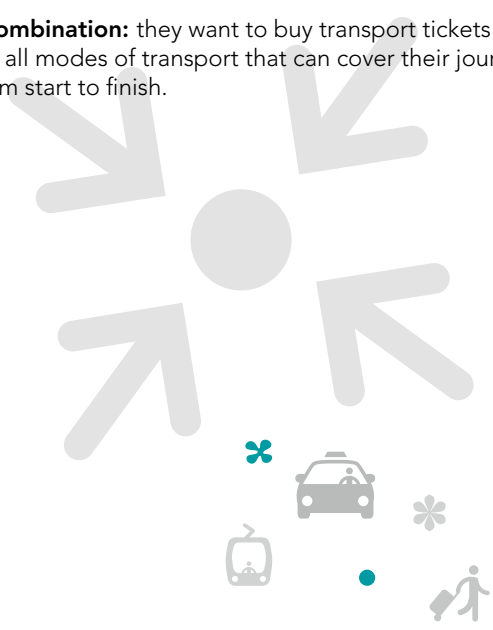
1/ AN INTERMODAL HUB

The story so far

Stations are places where towns and cities meet trains, and their primary role is to enable passengers to switch between modes of transport. To identify and assess passenger expectations, Gares & Connexions commissioned a survey from French market research institute TNS Sofres in 2010.

The results were published in summer 2011, and highlight three priorities:

- **forward planning:** passengers want access to information as early as possible to make their journey easier;
- **comparison:** they want to be able to choose between different modes of transport, depending on journey time and price, using real-time information on mobile phones or on screens and panels at stations;
- **combination:** they want to buy transport tickets valid for all modes of transport that can cover their journey from start to finish.





Managing an interchange hub

A station's primary function has always been to facilitate passenger connections. And in recent years the choice of transport modes has increased with the development of sustainable options and new interest in public transport. Gares & Connexions' mission is to manage the interchange between these modes of transport as thoroughly and flexibly as possible, opening up all kinds of possibilities for continuing one's journey on foot, by bike, car, tram, bus or metro. And the division draws on its multi-disciplinary skills to do so, working closely with transport provider partners.

The new Rhin-Rhône stations, opened in 2011, are an excellent example of this, offering quick connections between TGV and TER trains, buses a short walk away from platforms, a drop-off point for cars and taxis, parking facilities for bikes and motorbikes, footpaths, car hire and more. They are the epitome of a multimodal hub. Setting up the information system, management models and legal framework for these interchanges is a key priority for Gares & Connexions, which has overall responsibility for station development.

Promoting eco-friendly transport

Gares & Connexions is committed to sustainable transport and strives to promote green ways of getting around—walking, cycling and electric vehicles. Bicycle parks at stations and self-service bike hire networks are encouraged and sometimes co-financed.

An electrically assisted bicycle rickshaw service, piloted at Paris-Austerlitz, Paris-Lyon and Paris-Bercy stations in autumn 2010, was extended to six stations in Paris in summer 2011.

Gares & Connexions also supports the development of electric taxis. The first models will be introduced at Paris-Austerlitz, Paris-Montparnasse and Paris-Est stations in 2012, in conjunction with the Société du Taxi Électrique Parisien (STEP). This taxi fleet will serve stations, where they will also be able to recharge their batteries at "zero emission hubs".

MULTIMODAL TRANSPORT INFORMATION

Multimodal transport and tourist information points were opened in 2011 in Toulouse, Marseille, Poitiers, Limoges, Pau, Lyon-Part Dieu, Avignon TGV, Dijon, Bordeaux Saint-Jean and Belfort-Montbéliard TGV stations.

SNCF and tourist office staff welcome customers and provide information about the main tourist attractions and events in town.

Interactive multimodal information desks are also run in cooperation with public-sector partners (Le Mans and Marseille Saint-Charles stations, etc.).



2/ THE RIGHT INFORMATION IN THE RIGHT PLACE

We've rethought signage...

Stations can be big, complicated places. And the busier they are and tighter the time pressure, the more important it is to provide good quality information. Making sure the right information is available in the right place is a complex task, since it must be seen and understood by all—including updates on railway services, other modes of transport and services offered in the station.

Signage plays an important role in making information accessible. To develop signs based on customers' needs and behaviour, Gares & Connexions turned to AREP, the Institut Marcel Mauss centre for anthropological and sociolinguistic linguistics (LIAS-IMM), market research company eQual, and the LUTIN Userlab, dedicated to the use of digital information technology.

The new signage, launched in 2011 in the Rhin-Rhône TGV, Paris-Lyon and Paris-Saint-Lazare stations, was designed to be easy to read and understand for everyone, including travellers with visual impairments: panels are simpler, more modern and more effective. They make greater use of pictograms and internationally recognized symbols to be more easily understood by all passengers, including foreigners. The new system will be gradually rolled out across all stations, facilitating the passenger flows.



INFORMATION FOR THE VISUALLY IMPAIRED AND HARD OF HEARING

- **Train timetables on mobile phones:** SNCF is working with Phitech to test a mobile phone information system for people with visual or hearing disabilities. Information from train departure boards is communicated via Bluetooth by pressing 5 on phone keypads: details appear on the screen or are read by a voice synthesizer. This new service was piloted at the Nancy station, and since 2011 has been available for free in waiting areas at Paris-Est station and in the Rhin-Rhône TGV stations.
- **JADE: a success story.** This avatar appears on the flat information screens in stations, and translates announcements into sign language. The service is being piloted at Paris-Est station, and is already available at Belfort-Montbéliard TGV station.

... and are providing an ever wider range of information

Along with new signage, Gares & Connexions has continued to offer a range of information. New technologies—especially mobile ones including smartphones—require better anticipation, organization and standardization of ever-increasing volumes of information. The challenge is to coordinate data to facilitate mobility while ensuring passenger comfort.

Towards the end of 2011, the gares-en-mouvement.com website began displaying information at over 400 stations, including the Rhin-Rhône TGV stations, where dynamic maps show the location of other transport options near the station, plus the best routes to places of interest in the town.

Official mobile applications for stations are also available in new formats, for Android and iPhone in particular.



3/ MORE AND MORE SERVICES

Accommodating public services

Stations are public areas in town and city centres and an important part of daily life for passengers and local residents—which makes them ideal for accommodating public services. For over 15 years, stations in low-income urban areas have housed PIMMS' public service access points. Now numbering 14, these centres offer information about water, electricity, telephone and public transport services.

Since 2010, Gares & Connexions has been planning to set up job centres next to transport hubs for greater accessibility, and the first of these branches will be opening at Dreux station in 2012. Around ten are scheduled to open by 2014.

Handy services for commuters

With two billion people passing through every year, stations are obviously keen to host services that make life easier for passengers and local residents. One of Gares & Connexions' missions is to identify both their needs and possible service providers, and to test out new ideas.

After the success of the mini day-care centre that opened in Roanne station in September 2010, a call for expressions of interest was issued in November 2011 for 61 potential sites. This produced an average of seven responses for each site in February 2012. After the initial technical feasibility studies, calls for tender will now be issued work package by work package. In addition to this, a partnership agreement for ten day-care centres in and around the Paris area has already been signed with Babilou. The first two will open in 2012 in the Amiens and Paris-Nord stations. At Paris-Nord, the day-care centre will have room for 32 beds in a 344 sq m facility, plus an outdoor play area.

There's also room for medical services in stations. The first clinical laboratories were opened towards the end of 2011 in Marseille Saint-Charles, Paris-Nord and Paris-Saint-Lazare stations in early 2012, and a third may be opened in Lille-Flandres station in 2012. Gares & Connexions is also working towards setting up doctors' surgeries.

Kiala won the contract for providing parcel pick-up points for internet purchases in 2011. Two collection points were subsequently set up in 2010 at Paris-Montparnasse and Paris-Est stations, and the service has now been extended to Lille-Europe and most recently to Paris-Austerlitz station. 14 other sites in stations with left luggage facilities are under consideration.

Since July 2011, 6 stations under the Mediterranean Stations Management Office (Toulon, Aubagne, Sanary-Ollioules, Bandol, Saint-Cyr-La Cadière and La Ciotat) have been offering a unique concierge service, with two subscription options. The idea is to provide services that save time—from buying presents and finding a plumber to clothing alterations and ironing.



OPENING OF PARIS SAINT-LAZARE

Paris-Saint-Lazare station is a major interchange hub in the heart of the capital's main shopping district, with 450,000 passengers passing through every day.

With 10,000 sq m spread over the station's 3 floors (platforms, street level and metro) and lit by natural light, the new Paris-Saint-Lazare shopping arcade boasts a wide range of shops, combining very well-known brands and local retailers. Some have come up with concepts especially for the station, and new labels have seized this opportunity to set up in the heart of Paris.

The complex features three mid-size stores and around 80 other shops, services and eateries, plus a 250-space underground car park.

For commuters' daily needs, the platform level offers a newsagent, several food outlets and a highly popular health zone with a laboratory, pharmacy and Grand Optical opticians.

Travellers and local residents can purchase quality food from Carrefour City and Monop', a practical option adapted to the pace and appetite of an active urban clientele. They also benefit from an extensive retail range including fashion, culture, gifts, leisure, health and beauty, at both street and metro level.

Life in the station and surrounding area

Four concepts were presented following the Boutiques du Quotidien call for tender issued by Gares & Connexions in 2011. A final selection will be made in 2012. The idea is to identify an innovative and attractive concept that combines sit-down and takeaway food outlets, essential items, newspapers, magazines, books and other services. Eight pilot projects are planned for 2012, with 20 more for 2013. In the medium-term, the concept will be rolled out across 80 stations.

In Chartres, Thionville and Strasbourg, stations preempted this initiative, unveiling a new brand—both simple and practical—in 2011. Called Monop'Station, these outlets offer snacks, food and essential items, and resulted from a partnership between the marketing subsidiary of Dutch Railways and the expertise of Servex and Monoprix.

Specialized services include Coiffeur Express, first offered at Paris-Montparnasse and launched in the Paris-Est and Paris-Nord stations in 2011. Seasonal stalls selling Christmas specialities, regional products, clothes and sports goods have also been successful.

A network of business centres and shared work spaces

After the call for expressions of interest in 2010, Gares & Connexions appointed an operator and identified six stations to house its first business centres.

Regus, a world leader in flexible work spaces, has been selected to fit out Le Mans station in late 2012, to be followed by Bordeaux, Nancy and Amiens stations in 2013, and finally Paris-Nord and Lille-Flandres stations in 2014. These six business centres represent a total surface area of 4,200 sq m, including business lounges with wifi service, meeting and videoconference rooms, private offices and multi-purpose areas.

Gares & Connexions has already begun planning for a second series of centres in around ten other stations. Regus estimates the number of "mobile" or "nomadic" professionals at 8.5 million, indicating significant demand ahead. In-station business centres are set to become preferred meeting places, situated as they are in town and city centres, which limits journeys and saves time.

New waiting areas

Gares & Connexions' new mixed waiting areas are designed to let passengers rest, eat or relax, regardless of how long they have to spend in the station. Traditional waiting areas will be totally revamped—some specially equipped for professional use with wifi, others reserved for rest, relaxing as a family or having a bite to eat.

These waiting areas were introduced in 2011 in the new Rhin-Rhône stations, as well as at Paris-Bercy. Paris-Lyon and Paris-Montparnasse will follow in 2012.

By 2015, 60 stations will be outfitted with these new facilities.

THE CURTAIN RISES ON PARIS-LYON



By summer 2012, shops and services at Paris-Lyon station will have undergone a facelift. At platform level, passengers can

choose between a DailyMonop' offering fresh produce and groceries, a Costa Coffee—Britain's leading coffee shop, Paul and Phileas fast food and takeaway, and even Berko, with its brightly coloured cupcakes and cheesecakes. A multi-purpose area opening onto the shops close to the Information desk, will have touch screens and a Sony terminal.

The mezzanine floor will house restaurants. At Red d'Hippo you can eat lunch in 30 minutes flat or order burgers to take away. A Café Premier has been joined by a Fauchon kiosk.

On the mezzanine level, passengers will be welcomed by hostesses who will guide them to different areas. A business area will provide free wifi, office services (photocopy, fax, etc.) and couriers. The 34-seat Lounge will offer comfortable "business zones" for meetings, power sockets for electrical appliances and 15 iPads so that passengers can stay connected.

Finally, in the Kids' area, Elior and Gulli will offer hopscotch and other games, a games tower and a library of comic books and magazines.



4/ SERVICE QUALITY REVIEW

Measuring customer satisfaction

The service quality initiative implemented across 3,000 French stations aims to ensure that stations fulfill the 10 service commitments designed to meet basic customer expectations.

To this end, Gares & Connexions created Customer Satisfaction Indexes (ISC). These provide an annual customer satisfaction indicator using data from face-to-face surveys conducted in stations. Questions focus on five themes: management station, comfort and layout, passenger information, services and access to other modes of transport.

In 2011, 160 stations were surveyed, up from 140 in 2010, covering all of the French network's "European" and "national" stations. In regional stations, the number of respondents increased from 30 in 2010 to 46 in 2011, covering 40% of stations in this category.

Certification

In 2011, ISCs rose slightly against 2010, with the overall satisfaction rating up from 14.6/20 to 14.7/20. In general, ratings remained stable for key issues: staff helpfulness and station cleanliness. The only noticeable changes came in ratings for sandwich, pastry and takeaway food outlets, which rose by 0.5 points, especially in national stations. On the other hand, the quality of passenger orientation and information fell by 0.6 points, in both European and national stations. New signage, which is being introduced gradually and which customers will find easier to read and understand quickly, with information organized hierarchically using colours and pictograms, should do more to meet this basic customer expectation.











In 2011, the ISCs were used for the first time in the certification scheme. Out of 364 participating stations—including almost all European, national and regional stations—68 stations were certified. Between 100 and 150 further stations may be certified in 2012.

Summary of 2011 ISC results

In the "general atmosphere" section, the wording of the question was changed. Changes should therefore be evaluated with caution.

Type 1: Major stations in the European network

These are mainly served by high-speed trains or main lines. Traffic flows exceed 800 million passenger-kilometres, with more than 2 million passengers using these stations each year.

	Scale of 20	Change 2011/2010
 Overall satisfaction	14.5	=
 Accessibility	14.8	-0.2 pt
 General atmosphere	13.9	=
 Station cleanliness	14.2	-0.2 pt
 Staff helpfulness	15	+0.1 pt
 Comfort of waiting areas	12.6	=
 Ease of buying tickets	14.9	-0.1 pt
 Passenger orientation and information	14	-0.6 pt
 Food outlets, retailing and services	13.9	+0.1 pt
 Facilities	14.1	+0.1 pt

Type 2: National stations

These are medium-sized stations, predominantly serving high-speed or inter-regional lines, which allow passengers to continue their journeys via regional and local services. Over 400,000 passengers pass through these stations each year, with traffic flows of more than 150 million passenger kilometres.

	Scale of 20	Change 2011/2010
Overall satisfaction	14.7	+0.1 pt
Accessibility	14.6	-0.2 pt
General atmosphere	14.4	+0.1 pt
Station cleanliness	14.8	-0.2 pt
Staff helpfulness	15.5	+0.2 pt
Comfort of waiting areas	13.8	+0.1 pt
Ease of buying tickets	15.6	-0.1 pt
Passenger orientation and information	14.3	-0.5 pt
Food outlets, retailing and services	14.3	+0.2 pt
Facilities	14.3	+0.3 pt

Type 3: Regional stations

These are medium-sized stations, predominantly used as regional or local multimodal interchanges, with some connections to main lines, often serving tourists. Over 200,000 passengers pass through these stations each year, with traffic flows of more than 40 million passenger kilometres.

The number of stations sampled rose from 30 to 46 between 2010 and 2011, so changes should be assessed with caution.

	Scale of 20	Change 2011/2010
Overall satisfaction	14.9	+0.1 pt
Accessibility	15	=
General atmosphere	14.5	+0.2 pt
Station cleanliness	15.2	-0.2 pt
Staff helpfulness	15.8	+0.1 pt
Comfort of waiting areas	14	=
Ease of buying tickets	-	n/a
Passenger orientation and information	14.7	-0.8 pt
Food outlets, retailing and services	14	-0.1 pt
Facilities	14.3	=



10 SERVICE COMMITMENTS

The quality drive for France's 3,029 stations is based on 10 service commitments reflecting basic customer expectations:

"You will find information on services available in the station and its surroundings"

"Your train will be easy to find"

"You will be able to change your mode of transport easily (bus, taxi, bike, underground, car, etc.)"

"You will be kept informed of disruptions and alternative arrangements to help you continue your journey"

"You will be able to find your way around the station easily"

"Your station will be clean, tidy and eco-friendly"

"You will be able to wait in comfortable waiting areas"

"You will feel safe in the station"

"You will have access to clean restrooms"

"You will find the shops you need to make life easier"



MODERNIZING STATIONS

2011 was marked by the construction of the new TGV Rhin-Rhône stations and the renovation of existing stations. In total, €180 million was invested to prepare stations to meet increased traffic, improve passenger services and comply with sustainable development criteria in terms of land use and the protection of the environment.



1/ DELIVERED IN 2011

Two new stations on the Rhin-Rhône high-speed line

On 11 December 2011, after many years of negotiation, coordination and work, the first section of the East branch of the Rhin-Rhône high-speed line was commissioned. And at the heart of this new development with a European dimension are the line's stations. The major projects of this new infrastructure are two new flagship stations (Belfort-Montbéliard TGV and Besançon Franche-Comté TGV) and renovation of the nine existing stations.

Besançon Franche-Comté and Belfort-Montbéliard TGV are both High Environmental Quality (HQE) certified and located outside their respective agglomerations, bringing intermodality to their area as hubs that provide comfort and easy connections for passengers. With pedestrian access, bike and motorbike parks, drop-off points, taxi ranks, bus stops, car hire, TER road and rail services (for Besançon Franche-Comté TGV), these stations have been carefully designed to bring together the whole range of transport available.

Particular thought has gone into signage and facilities for helping passengers find their way around quickly and easily. The two stations are also fully accessible for people with reduced mobility through specialist car parks, lifts and platform access ramps, sensory guidance routes, audio location signals, light markers, and information in Braille and sign language.

Key figures	Besançon Franche-Comté TGV	Belfort-Montbéliard TGV
Usable floor area of buildings	3,000 sq m	3,375 sq m
Total site area	6 ha	7 ha
Car park	1,000 spaces	1,425 spaces
No. of passengers per year	1 million	1 million
Total cost of work	€30 million	€30 million

Radical transformation at Paris-Saint-Lazare station

Paris-Saint-Lazare station (see box p.22) had not undergone any major renovation work since 1970. An ambitious project called "Cœur Saint-Lazare" was started in 2003, and restored the quality of service and amenities that passengers today can expect of a main Paris station. The total cost of works came to €250 million.

By the end of 2011, flows of passengers and staff through the station had already been improved. A huge concourse where the former Salle des Pas Perdus was located links the three levels of the metro, the street and the platforms. Some 250 underground parking spaces are available, as well as 10,000 sq m of retail and service units.

The final phase in 2012 and 2013 will be the renovation of the Rome and Havre forecourts, as well as the road between them. Large glass surfaces will reveal the heart of the station. The forecourts will be redeveloped to make it easier to move around in the station and improve connections with buses and accessibility for pedestrians, especially for people with reduced mobility.

Other deliveries

Alongside the big TGV Rhin-Rhône and Paris-Saint-Lazare projects, a number of station projects were inaugurated in 2011. The following, in chronological order, were particularly noteworthy:

- the new Versailles-Chantiers station entrance in February 2011, providing a direct connection with buses coming from the south;
- Auxonne station in February 2011 and its new multimodal hub;
- Amiens station (4.5 million passengers per year), in June 2011, is now more friendly and welcoming, with a new in-station convenience store and a nursery to be opened soon;
- Saint-Étienne Châteaucreux station, in June 2011, combining modernity and comfort;
- TGV Haute-Picardie station, in June 2011, now offers more space, services and accessibility;
- the first phase of the new Bordeaux Saint-Jean station in September 2011, with the commissioning of the multimodal hub and new, more comfortable service areas.



2/ RENOVATION PROJECTS

Renovation works in main Paris stations

Paris-Lyon station: by 2020, Paris-Lyon station will be welcoming over 10 million more main line passengers every year (for a total of 45 million passengers a year). To meet this demand, large-scale works were started in 2010. A new building fitted with a beautiful glass canopy now matches the historical frontage on Place Louis Armand. It is home to more than 4,000 sq m of shops, services and waiting areas (see box page 23). The station has also implemented new signage.

The creation of this enclosed area has made it possible to remove a good deal of the sound pollution that affected local residents. It also offers new waiting and service areas. Another innovative feature is that the station produces its own electricity thanks to solar cells fitted to the glass canopy roof. Rainwater is collected for watering plants, washing floors and reducing waste.

3,029 STATIONS, FIVE DIFFERENT TYPES

Type 1

33 main stations in the European network (656 million passengers), serving major urban areas (over 200,000 inhabitants).

Type 2

83 national stations (325 million passengers) around which the rail network is structured.

Type 3

232 regional stations (690 million passengers), medium and small stations.

Type 4

1,022 local stations (249 million passengers), small and very small stations.

Type 5

1,646 stops (32 million passengers) for accessing the regional network.

RENOVATION STAGES AT PARIS-AUSTERLITZ

Stage 1 - 2011/2013: Cour Seine, Quai Austerlitz.

Stage 2 - 2013/2016: 10,000 sq m of SNCF GHV offices.

Stage 3 - 2016/2020: A7/A8 property development, 55,000 sq m of offices and hotels.

Stage 4 - 2018/2021: reworking of interchange between different modes of transport and commissioning of 20,000 sq m of shops.

Stage 5 - 2016/2020: ringing the district with a new road spanning the tracks and opening onto developments by AP-HP Paris hospitals.

The total budget for the renovation work is estimated at over €300 million, a third of which will be financed by SNCF equity and the remaining two-thirds by private investors.

Paris-Austerlitz station: renovation works were launched in 2011. Work will continue in stages until 2020 with the aim of turning the station into an ultra-modern exchange hub which connects with the city and the new Paris Rive Gauche estate, strengthened by the arrival of a new TGV line.

The project is intended to respond to two railway service developments: the Paris region network as part of the Grand Paris Greater Paris project and the planned arrival of a new Paris-Orléans-Clermont-Lyon high-speed line by 2025-2030 to ease pressure on the Paris-Lyon line. The planned route should be set by June 2012 so that feasibility studies can begin.

Unlike other Paris stations, Austerlitz station still owns a lot of property in its main concourse and the surrounding area. The renovation programme will first see the development of 20,000 sq m of shops, 55,000 sq m of offices and hotels, and 1,200 parking spaces.

The initial stage of the works was launched in December 2011 and will cost €15 million. It involves renovating the Cour Seine for passengers and the general public. Historical frontage will be uncovered, and a forged steel and glass canopy will once again crown the platform area. The first stage of the project will be commissioned in late 2013.

KEY DATES

April 2009

Opening of the "Le Grand Paris de l'agglomération parisienne" Greater Paris exhibition

3 June 2010

Enactment of French legislation pertaining to the Grand Paris project

26 January 2011

Government/Regional agreement protocol

24 August 2011

Publication of the decree approving the overall design of the Grand Paris Express

December 2012

Start of first public consultations on the automated metro project

Extension and improvement of Paris region stations

With 383 stations and stops and nearly 3 million passengers every day, the Paris region network is the densest and most heavily used part of the national network. It is receiving unprecedented investment to upgrade stations and improve the quality of shops and services offered to passengers.

This plan is being managed by the new Transilien Stations Department and is part of the new contract negotiated with the Paris region transport commissioning body (STIF) and more widely, the discussions on the future Grand Paris network.

It involves three programmes:

- the Accessibility Master Plan agreement for Paris region stations, which provides for investment of €1,454 million across 207 stations (2011-2018);
- the Impaqt agreement with STIF, signed in December 2011, which provides for an investment plan designed to renovate rolling stock, and improve train punctuality and reception services in 20 stations in the Paris suburbs and 16 RER C stations in the capital itself (an €83 million investment for the stations);
- the creation of 21 interconnection hubs with the Grand Paris network (2020-2025).

Future multimodal interchange hubs

Many regional stations are going to be transformed into multimodal hubs in order to meet the rise in rail traffic and maximize their role as an intermodal hub. These new stations will be better integrated into the towns and cities where they are based and designed to deliver sustainable transport, providing more shops and services, better comfort, better reception, and better access for people with reduced mobility.



The Nice-Thiers station redevelopment project, located at the heart of the city, is part of the urban regeneration project run by the City Hall and the Communauté Urbaine Nice Côte d'Azur organization. The future station will provide both an area full of life and services in the city centre and a huge hub for different modes of transport. By 2015, residents of Nice and passengers using the Côte d'Azur railway lines will have accessible intermodal facilities. The station's renovated and environmentally responsible architecture will offer new services and a high level of comfort.

Work to transform Montpellier Saint-Roch station is part of a huge urban project. The creation of a new estate, Quartier Nouveau Saint-Roch, will involve the reorganization of road access and parking, and a wider range of public transport options, including a tram service. The project has been designed to reduce station congestion, improve access to the various modes of transport, create links between neighbourhoods and refresh the station's urban image, with some 2,000 sq m of retail areas. Facilitating access for people with reduced mobility is an important part of this work. A large central nave will also serve as a new covered link and there will be more routes to platforms lit with skylights. Terrace-gardens with a variety of plants will also be created to serve as outdoor waiting areas.

The Toulon station redevelopment project is located in an urban regeneration zone and is a key to its success. The project is based on three principles: the restructuring of outside areas to improve links between different modes of transport and accessibility, the reorganization of the historic building and the development of in-station shops and services. Work will focus on the renovation and extension of the central concourse, the creation of two summer concourses protected from the sun and bad weather, and the renovation of the forecourt to turn it into a pedestrian crossroads that opens onto the town.

The transformation of Grenoble station, built in 1968 for the Winter Olympics and not renovated since, will meet new passenger expectations and the increase in rail traffic. The Grenoble station interchange project will transform the current station into a modern multimodal hub, reflecting the city it serves.

Key figures for multimodal hub projects

	No. of passengers in 2020	Total cost of work	Commissioning date
Nice-Thiers	11 million	€21 million	2015
Montpellier Saint-Roch	10 million	€53 million	2014
Toulon	5 million	€21 million	2013
Grenoble	11.8 million	€34 million	2017





GREEN TEMPERATURE CONTROL AT BELFORT-MONTBÉLIARD TGV

The station's electricity requirements are partly supplied using photovoltaic cells. Solar panels located on the roof of the building cover over 50% of annual hot water requirements. The facility is combined with a hot water top-up system.

Very low-temperature geothermal power is also used, as are two heat pumps. The system includes:

- a geothermal field of 35 100m-deep bores, which extract heat from the ground and contribute to hot water production, or remove heat from the building;
- two water-sourced heat pumps transfer heat from the environment to a hydraulic distribution network which supplies the equipment (radiators, reversible underfloor heating/air conditioning, air processing plant) and the air-conditioning terminals in rooms.

3/ A NEW GENERATION OF ECO-FRIENDLY STATIONS

Environmental sustainability

The two new Rhin-Rhône stations, Besançon Franche-Comté TGV and Belfort-Montbéliard TGV were commissioned in December 2011 and are shining examples of environmental sustainability for both integration into their surroundings and their economic use of resources.

The Besançon Franche-Comté TGV station is tucked away, half-buried, in a huge clearing in the forest, as part of a resolutely "green" architectural approach which involves a plant-covered roof. Its 1,000-space car park designed in partnership with the French National Forestry Agency (ONF) fits around wooded areas while preserving the most important species. At Belfort-Montbéliard TGV, the station also makes room for nature and light with abundant use of wood and glass.



RUNOFF WATER MANAGEMENT AT BELFORT-MONTBÉLIARD TGV

The rainwater recovery system installed at Belfort-Montbéliard TGV station involves filtering the water on-site and limiting the amount sent down the drains via two devices:

- a plant-filled thalweg*: runoff water is channelled towards this thalweg, which reduces and slows

its movement down the drains by increasing evaporation and soil penetration. It is divided into four sections which regulate water flow to the drains;

- small trenches dug in the longstay car park and filled with plants selected for their filtering qualities.

Runoff water from the roads is first cleaned here. It then passes through an oil separator device which removes mud and oil before it reaches the thalweg.

* *Thalweg*: German word from *Thal* (valley) and *Weg* (way). Line at the bottom of a valley along which water travels.



The design, layout and orientation of the buildings together with the use of renewable energies optimize the conservation of natural resources. A particular effort has been made to ensure a comfortable temperature for passengers while optimizing the energy consumption of the buildings.

The two stations have photovoltaic cells (panels at Besançon Franche-Comté TGV and a waterproof membrane at Belfort-Montbéliard TGV) and are positioned so as to make the most of solar energy. Solar boilers, also installed on the roof, will meet some hot water requirements.

Both of the stations also use an earth tube system which sends air from outside through a long network of underground pipes for preheating in the winter and natural cooling in the summer. At Besançon Franche-Comté TGV station, these systems are supplemented by a wood boiler managed sustainably by a local wood energy company. At Belfort-Montbéliard TGV station, the characteristics of the ground and underground water have made it possible to install geothermal pumps.



OPTIMIZING CLEAN AIR QUALITY AT BESANÇON FRANCHE-COMTÉ TGV AND BELFORT-MONTBÉLIARD TGV

The clean air required for ventilating operations rooms and station concourses passes through a geothermal heat exchanger or "earth tube system". This consists of a set of horizontal tubes fitted to the ventilation system. Air processing plants regulate air exchange throughout the building, removing old air and replacing it with fresh air. It is a "double flow" system: clean air from the earth tube system is preheated using a thermal wheel in contact with the old air that has already been heated. This system balances out air temperature variation through the day or between seasons by using the thermal inertia of the earth. Optical sensors adjust ventilation according to the number of people present and the activity level in each room in order to optimize energy use.



French HQE and BBC certification

The new Besançon Franche-Comté TGV station is the first in Europe to have received both French standard High Environmental Quality (HQE®) and Low Energy Consumption Building (BBC Effinergie®) certification during the construction stage. BBC particularly recognizes the energy performance of the station, which has expected energy consumption of 50% below the regulation standard. Belfort-Montbéliard TGV station has also received good marks under HQE® criteria.

The stations' environmental profiles have been certified by an approved body (Certivéa). Certification covers the integration of the buildings into their surroundings and systems set up for energy and water management or for overall maintenance of environmental performance.

They may not quite meet the energy performance of Besançon Franche-Comté TGV and Belfort-Montbéliard TGV, but all stations that undertake renovation work also conform to environmental conservation and sustainable development principles. Such is the case for the ten other stations on the Rhin-Rhône line and the big historical stations like Paris-Lyon, which now has solar cells on the roof of its glass canopy and a rainwater collection system.

A LOW-ENERGY STATION AT BESANÇON FRANCHE-COMTÉ TGV

The techniques used to optimize energy efficiency gave Besançon Franche-Comté TGV station French BBC Effinergie® Low Energy Consumption Building certification.

As befits its natural environment, the station is fitted with a wood boiler room which provides 90% of the heating requirements of the building's 3,000 sq m of usable areas.

In the Franche-Comté region, wood fuel is considered a renewable energy source because timber is used slower than forests grow.

The installation of an earth tube system for controlling the temperature in the station helps maintain a comfortable temperature for passengers. Air from outside is cooled in summer and heated in winter by passing through an underground pipe. This delivers energy savings of around 60 MWh per year for heating and 20 MWh per year for cooling. In addition to this air conditioning system, natural ventilation has been installed via openings carefully located within the building. This system is called *free cooling*, and it provides cooling on summer nights while replenishing the air inside.

Lighting via the south-facing roof makes the most of the sun's light and energy. 300 sq m of solar panels installed on the roof openings produce over 40,000 kWh of electricity every year. In addition, a solar boiler supplied by thermal collectors produces over 30% of the station's annual hot water requirements.

4/ STATIONS ARE WINDOWS ON THE WORLD

International connections

In an increasingly globalized world, Gares & Connexions is developing close relationships with its foreign station management partners. These international connections allow for the exchange of best practice and help it gradually extend its work beyond the borders of France.

In terms of multilateral partnerships, the division is well represented at meetings of the Stations Managers Group set up under the auspices of the International Union of Railways (UIC), and other UIC bodies. 2011 saw a number of international conferences: Next Station (March 2011), Railway Terminal World (April 2011), Smart Station (November 2011).

The 5-year station twinning agreement signed in 2010 by Gares & Connexions and its Russian counterpart, DZV, continued in 2011 with exchanges between Sochi and Nice, Vladivostok and Marseille Saint-Charles, and Samara and Toulouse stations. Also in 2011, Gares & Connexions strengthened its ties with its Austrian partner ÖBB through the twinning of Vienna and Tours stations.

Gares & Connexions' growing international expertise and the support of its subsidiaries and SNCF units enabled it to submit a number of tenders in 2011: Saudi Arabia (station operation and maintenance), USA (Florida High Speed Rail and DesertXpress projects), Morocco (commercial offer for the Tangiers-Casablanca high-speed line). It also consulted on intermodal projects in India and station design in Korea.



AREP'S MAIN CONTRACTS ABROAD

- New station in Qingdao (China)
- Roof of the Hangzhou metro lines (China)
- Design and monitoring of the construction of the Agribank Head Office in Hanoi (Vietnam)
- Urban planning for Vung Tau (Vietnam)
- Urban planning for the new town Skolkovo (Russia)
- Urban planning for the new town Al Khobar (Saudi Arabia)
- Redevelopment design for Mumbai station (India)



Art and culture

Stations are often unique in terms of architecture, space, lighting and numbers of users. These characteristics make them exceptional locations for hosting cultural events. At the same time, such events contribute to the reputation and dynamism of stations. Gares & Connexions' ambition is therefore to promote culture in stations as much as possible. The division has a predilection for photography, but also participates in numerous cultural events right across France. Key events in 2011 included:

- photography exhibitions: "Paris New-York Grandes Lignes" at Paris-Est station in May 2011, "Plaine Commune, Terre de création" at Paris-Est station in May 2011, photos of Russia in a number of stations as part of the twinning agreement with Russian stations;
- for the 2nd consecutive year, Gares & Connexions took part in the "Rencontres d'Arles" photography festival with exhibitions and activities in Paris-Lyon, Avignon TGV, Montpellier Saint-Roch, Marseille Saint-Charles and Arles stations;
- in May and June 2011, Paris-Lyon, Marseille Saint-Charles, Toulon and Avignon stations celebrated Mediterranean culture by displaying photos from the first Festival PhotoMed devoted to Turkey and the great Magnum Agency photographer, Martin Parr;
- concerts: Michel Jonasz at Lyon Saint-Exupéry station for the Printemps de Pérouges festival, a musical performance at Saint-Étienne station for the Festival Paroles et Musiques in June;
- in July 2011, Gares & Connexions teamed up for the first time with the Eurockéennes music festival in Belfort, with exhibitions and events in Paris-Est and Belfort stations;
- the ArtBattles tour in June and July 2011: the winners of this fun performance competition featuring artists from New York and France were selected in a public vote by passengers and passersby—a first in French stations (Paris-Nord, Paris-Lyon, Marseille Saint-Charles and Lyon Part-Dieu).



Pascale Marthine Tayou: "Plastic Bags"



Tomas Saraceno: "La ville nuage"

WORKS OF ART IN STATIONS

Sophie Boissard: "Stations are like a city within a city, and are a perfect location for artistic expression of all kinds. The new Paris-Saint-Lazare station symbolizes this perfectly as it hosts Pascale Marthine Tayou's participative contemporary piece over the coming months. This has been made possible thanks to the support of Klépierre, Spie Batignolles, the Musée Marmottan Monet and entreprisecontemporaine® who are helping us to install artists' creations in stations that reflect their historic setting. With the works of Pierre Malphettes and Tomas Saraceno in the Rhin-Rhône TGV stations and now Pascale Marthine Tayou's piece in Paris-Saint-Lazare station, art really is taking its place in stations."



GARES! FABRIQUES D'ÉMOTIONS

Stations have always been places that inspire and stir emotions, and are now being renovated like never before. In May 2011, Autrement published this magazine/book about stations, designed and written

by a group of journalists and writers. It comprises three sections: a photo journey through stations past and present, portraits and the thoughts of people who work there, and on-location reports.



Philippe Lebru



Pierre Malphettes: "La 504 Luciole"

ART IN THE STATION AT BESANÇON FRANCHE-COMTÉ TGV AND BELFORT-MONTBÉLIARD TGV

Besançon Franche-Comté TGV draws on the region's reputation for watchmaking in keeping with an old tradition of displaying art that reflects local history and culture in stations. A huge clock designed by Philippe Lebru now overlooks the Salle des Pas Perdus. It weighs 6 tonnes, measures 6 metres high, and is fitted into an 11 metre panel, with a 4 metre pendulum and visible wheels with a diameter of 3 metres. It was funded by SNCF and private funds raised through a patronage programme run by the Fondation du Patrimoine. Artist Pierre Malphettes, who produced "La 504 Luciole" in 2007,

put this vehicle on the road from 10 November to 10 December 2011, when it pulled into the new Rhin-Rhône station, Belfort-Montbéliard TGV. "La 504 Luciole" evokes its epic journey from Marseille to the Scottish borders, bringing a note of poetry to its urban and rural surroundings. The phosphorescent wake of this "UTO" (Unidentified Travelling Object) stands for the combination of the magic of electricity with the combustion engine. It also celebrates two centuries of Peugeot manufacturing in Montbéliard and the surrounding area.



5/ INVESTMENT PROGRAMME OVERVIEW

In 2011, Gare & Connexions invested €180.7 million in fixed station infrastructure, including €145.6 million funded through SNCF equity and including working capital requirements of €11 million (€176.2 million in capitalized production costs and €4.4 million in direct acquisitions).

The main investments made during 2011 involved renovation work on existing stations, and the construction of new TGV stations.

In addition, the Proximités business unit temporarily continued the investment programmes in regional stations launched before the creation of the Gares & Connexions business unit. These investments came to around €60 million in 2011 (including €20 million in equity).

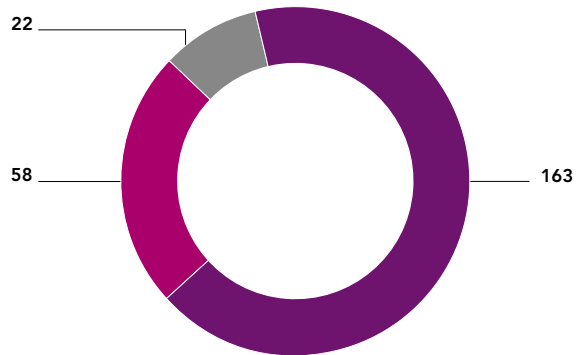
Major projects completed in 2011 include:

- the Bordeaux Saint-Jean multimodal hub (€5.4 million)
- the reorganization of shops at Bordeaux Saint-Jean station (€4.3 million)
- the new Besançon Franche-Comté TGV (€24.5 million) and Belfort-Montbéliard TGV (€25.1 million) stations
- improved passenger information on the northern part of RER lines C and D and the shift of the Infogare service to new technologies (€5.6 million and €3.2 million)
- renovation work on Paris-Saint-Lazare station, including adaptation for people with reduced mobility (€5.8 million)
- access to RER line H for people with reduced mobility (€4.5 million)
- installation of CCTV protection systems in Paris-Lyon and Paris-Bercy stations (€3.2 million)

Premises commissioned in 2011

(€ million)

- Main stations and Gares & Connexions head office
- Regional stations in and around Paris
- Regional stations outside the Paris region

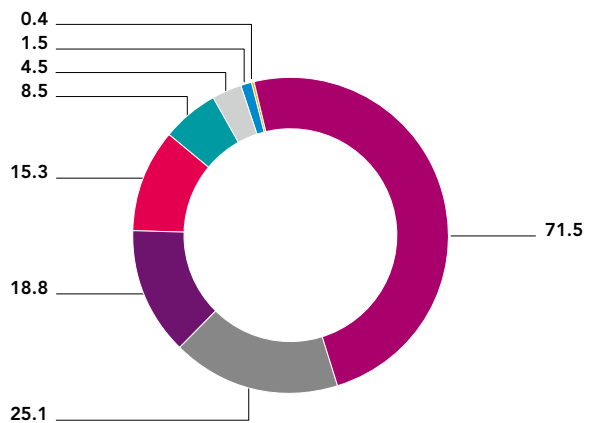


Total: €243 million

Breakdown of Gare & Connexions equity investment by programme

(€ million)

- Site projects/New stations
- Facilities upgrade
- Service and passenger information programme
- Renovation/Creation of rented or concession areas
- CCTV protection programme
- Programme for people with reduced mobility
- Tools for station operations programme
- Other



Total: €145.6 million

List of investments over €1 million in 2011

Stations	Associated programme	Description	All 2011 expenditure (*) (€ million)
AMIENS	SITE PROJECTS	Station reorganization	2.0
AVIGNON TGV	SITE PROJECTS	Redevelopment for East-West link	1.1
BELFORT-MONTBÉLIARD TGV	SITE PROJECTS	New TGV Rhin-Rhône station	12.0
BESANÇON FRANCHE-COMTÉ TGV	SITE PROJECTS	New TGV Rhin-Rhône station	12.8
BORDEAUX SAINT-JEAN	SITE PROJECTS	Multimodal interchange hub	1.8
CHALON-SUR-SAÔNE	SITE PROJECTS	TGV Rhin-Rhône station renovation	1.4
CHAMPAGNE ARDENNE TGV	SITE PROJECTS	Redevelopment for tram line	1.0
DIJON VILLE	SITE PROJECTS	TGV Rhin-Rhône station renovation	1.1
LONS-LE-SAUNIER	SITE PROJECTS	TGV Rhin-Rhône station renovation	1.0
LYON-PART DIEU	SITE PROJECTS	Construction of entrances to the new platform K	2.6
LYON-PART DIEU	ADDITIONAL SERVICES AND OPERATION	Renovation phase 1– Station renovation drawing	1.6
LYON-PART DIEU	ADDITIONAL SERVICES AND OPERATION	Renovation phase 1– Passenger information programme	1.0
LYON-SAINT-EXUPÉRY TGV	SITE PROJECTS	Multimodal interchange hub	3.3
MÂCON VILLE	SITE PROJECTS	TGV Rhin-Rhône station renovation	1.5
MONTPELLIER	SITE PROJECTS	Montpellier Saint-Roch interchange hub - PHASE 2	3.7
PARIS-AUSTERLITZ	SITE PROJECTS	Gare d'Austerlitz station: Cour Seine Project	1.0
PARIS-LYON	PROPERTY	Replacement of 6 escalators	1.1
PARIS-LYON	SITE PROJECTS	Space creation and upgrade of the Yellow Zone	23.8
PARIS-MONTPARNASSE 1 AND 2	PROPERTY	Investment in 2 sectors of the property	1.4
PARIS-NORD	TENANTS	Cross-channel terminal extension	2.2
PARIS-SAINT-LAZARE	TENANTS	Relocation of station centre	2.0
PARIS-SAINT-LAZARE	PROPERTY	Diversion and cleaning of utilities networks	1.8
PARIS-SAINT-LAZARE	SITE PROJECTS	Renovation work on station centre and accessibility	11.1
PARIS-SAINT-LAZARE	ADDITIONAL SERVICES AND OPERATION	Station usage plan	2.0
PERPIGNAN	SITE PROJECTS	Forecourt renovation	1.4
PERPIGNAN	SITE PROJECTS	Multimodal interchange hub	1.0
TOULON	SITE PROJECTS	Multimodal interchange hub	2.0
TOURS	PROPERTY	Remodelling of the main passenger concourse and lighting	1.3

(*) SNCF equity and subsidies or funding from regional transport commissioning authorities and other partners

THE BUSINESS MODEL

The French stations decree of 20 January 2012 confirmed the Gares & Connexions business model. It states that charges are intended to cover the running costs of maintenance and operation, and also investment costs. It also approved the fact that these investment costs could be billed with a remuneration taken into account for capital invested.

Services and facilities shared by all rail transport companies are regulated, and invoiced according to a train-departure rate. Rates are based on the station or station segment costs (operating and investment costs), in accordance with the total number of

train departures, in application of the following double rule:

- operating costs are billed euro-for-euro;
- investment costs (net of subsidies and any other external funding) correspond to the provisions for depreciation billed euro-for-euro and the remuneration for capital invested (net book value of assets x remuneration rate of capital committed).

Part of the rate is adjusted according to the distance travelled by the train (within a city, between two regions, crossing more than two regions).

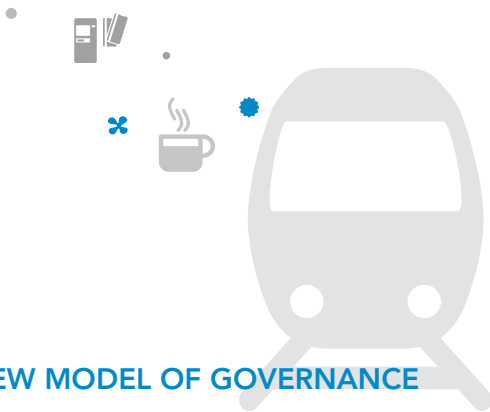
Note: specific services (train departures, platform welcome, train preparation, etc.) are not part of the service covered and are not performed by Gares & Connexions.

For non-regulated activities (concessions and rentals), 50% of their profit is deducted (after remuneration of capital committed) from the costs of regulated activities, individually for each national rail station, and by region for regional and local stations.

NEW GOVERNANCE FOR STATIONS



Gares & Connexions relies on close collaboration with its partners and stakeholders involved in planning the development of stations. In 2011, the legal framework for this model of governance was clarified, and partnership structures were strengthened.



1/ NEW MODEL OF GOVERNANCE

The stations decree referred to in the French Act of 8 December 2009 pertaining to rail transport organization and regulation (ORTF) instituted a system of station governance which gives a leading role to the Transport Commissioning Authorities (AOT). It provides for Regional Partnership Bodies (IRCs) to be set up for each station or functional group of stations; for two bilateral meetings to be held with the AOTs (Regional councils or STIF) every year to discuss station services, planned investments and fares; and for an AOT to have the powers negotiate a multi-year contract (together with the next TER agreements) for regional and local stations within their area.

Relationships with transport companies

In 2011, Regional Transport Consultation Committee meetings were held in each region of mainland France and for each of the major Paris region stations, with a total of 26 committee meetings between May and September 2011.

They provided opportunities for Gares & Connexions to discuss service plans, our station quality review, ISC customer satisfaction indices, investments and their impact on 2013 rates with all rail transport companies serving each region. We used this opportunity to present changes in transporter billing and rates for 2013.

A new private railway company participated in these meetings for the first time: thello, which serves Paris-Lyon and Dijon stations in France.

Relationships with Transport Organizing Authorities

On a national level, Gares & Connexions continued discussions started in 2009 with the Association of French Regions (ARF). Discussions focused on the principles of station governance and the nature of services for passengers and rail transport companies, depending on the station, the business model and potential opportunities for development (adjustable charges, the implementation of systems for financial regularization). They also considered details of investment programme methods, including implementation of regional accessibility master plans and development of station capacity. Careful attention was paid to working together to optimize the cost and operating methods of these projects, given limited financial resources. As part of the commitments made by the Chairman of SNCF in July 2011 to further strengthen the level of transparency associated with activities run under official local authority agreements, a list of benchmark indicators is being finalized by ARF and the SNCF Proximités and Gares & Connexions divisions.

2/ DEVELOPMENT OF PROJECT PARTNERSHIPS

In addition to the regional authorities, who serve as regional rail transport organizing authorities, Gares & Connexions often works with city councils, urban councils, associations of mayors and the Transport Authorities Group (GART) on issues concerning the development of stations and the areas around them, and, more widely, intermodal transport. These relationships continued in 2011, a year marked by some key events.

In 2011, 250 station investment projects were jointly monitored by a steering group bringing together project investors and stakeholders.

PARTNERSHIP AGREEMENT BETWEEN GARES & CONNEXIONS AND RÉSEAU FERRÉ DE FRANCE (RFF)

In July 2010, Gares & Connexions, manager of service infrastructure and RFF, infrastructure manager, jointly expressed their intention to work together. In accordance with their respective missions, the two partners committed themselves to promote passenger rail transport and abide fully by the approach set out in France's Grenelle environmental initiative strategy.

Ten working groups were set up to examine three main themes: consistency between the services offered to railway companies by Gares & Connexions and RFF time-slot allocation; in-station passenger services; and station-related projects.

They delivered their first results in 2011, defining and implementing principles for coordinating the process for preparing the annual Network

Reference Document; processing railway company requests for station services; and reviewing and finalizing negotiations between the bodies for financial years 2007-2010 for management of platforms, passenger concourses and associated structures. Their work has continued in 2012, taking into account the new French stations decree issued on 20 January 2012.

3/ DIALOGUE ON ISSUES INVOLVING STATIONS

In 2008, Gares & Connexions founded the "Cities and Stations" working group with the French City Mayors' Association (AMGVF) and the French Federation of Urban Planning Agencies (Fnau). Its main task is to promote dialogue between local authorities and railway industry representatives, and to discuss the governance of projects relating to the development of interchange hubs and the areas around stations. In 2011, the working group was expanded to include the Transport Authorities Group (GART), the Centre for Research into Networks, Transport, Urban Planning and Public Buildings (CERTU), the Association of French Regions (ARF) and the Public Transport Union (UTP). A conference held 22 June 2011 entitled "Governance of Stations: Stakeholders, Roles and Initial Results" reviewed the implementation of this shared governance model and identified avenues for working on tools to take it forward.

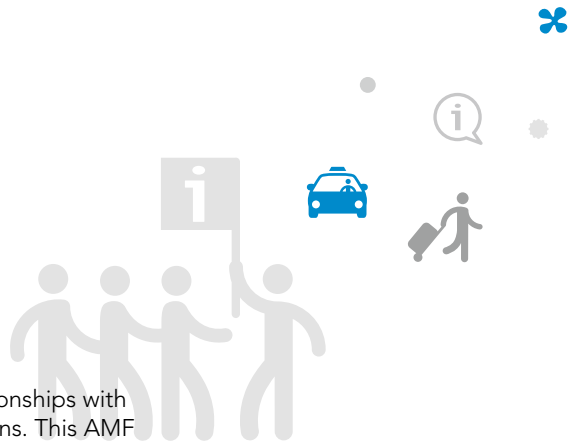
In December 2011, Gares & Connexions, the Association of French Mayors (AMF) and Réseau Ferré de France (RFF) signed a charter with the aim of "Working together for tomorrow's sustainable stations and neighbourhoods". Its goal is to promote the development of stations, especially those located in small and medium-sized towns, as strategic interchange and mobility hubs at the heart of the town.

It seeks to:

- make towns more "sustainable" by encouraging projects that combine urban planning and sustainable transport;
- develop intermodality around stations and play a role in increasing the attractiveness of public transport;
- optimize use of built land and green areas in and around stations;
- ensure the presence of shops, services and other reception and information systems in stations, in agreement with regional transport commissioning authorities.

Gares & Connexions also signed a charter initiated by the French Secretary of State for Tourism on the quality of services for tourists, together with organizations including Aéroports de Paris and RATP, the Paris region transport authority. This charter encourages signatories to work together to provide services and promote the results of their cooperation. A number of actions have already been undertaken, in particular the production of a common logo to help tourists identify staff responsible for welcoming them, and professional development training provided by the Île-de-France Paris region.





"This charter marks a very important stage in our relationships with mayors and in relations between stations and their towns. This AMF working group encourages us to engage in a productive and innovative partnership that needs to be pursued, especially with regard to sensitive issues that affect our respective heritage. One of the working group's key demands is a single joint contact person for our two railway companies. The three-party charter provides an initial response, specifying that whenever possible, Gares & Connexions and RFF will work together to appoint a single contact. As such, it represents a big step forward. I hope and trust that it will improve efficiency and planning for many local projects, and in so doing serve both railways and the regions of France."

SOPHIE BOISSARD,
 Managing Director, Gares & Connexions

STATION FORUMS



Organized by Gares & Connexions, these forums were launched in April 2010, bringing together sociologists, scientists, students, politicians, business people and journalists. They are broadcast live on the Connectgares Twitter feed and proceedings can be viewed on the Gares & Connexions website.

- 19 January 2011**
Stations—lively hubs contributing to the development in the Paris region
- 2 March 2011**
Stations—temples of technology
- 6 April 2011**
Stations—microcosms of a post-industrial society
- 18 May 2011**
Stations—places of order and discipline
- 29 June 2011**
Stations—a political challenge
- 14 September 2011**
Stations—reinvigorated public areas

- 19 October 2011**
Stations—places for connecting
- 30 November 2011**
Stations—fuel for the imagination
- 25 January 2012**
Rail stations, airports and metro stations—similarities and differences?
- 7 March 2012**
Stations and regions—how they interact?
- 11 April 2012**
Stations—real estate like any other?
- 23 May 2012**
The informal economy in stations—measures and policies?
- 20 June 2012**
What can be contracted out in stations?
- 12 September 2012**
Private-sector stations—dream or reality?
- 24 October 2012**
Stations—how green are they really?
- 5 December 2012**
What business model for stations of the future?

2011 FINANCIAL STATEMENTS



1/ GARES & CONNEXIONS DIVISION FINANCIAL HIGHLIGHTS FROM THE SNCF GROUP FINANCIAL REPORT

2011 SNCF financial statements approved by the Board of Directors
on 16 February 2012

(€ million)	2010	2011	Change
Revenue	1,134	1,166	+2.9%
Gross profit (EBITDA)	175	175	
Gross profit / Revenue	15.5%	15%	
Current operating income	76	64	
SNCF equity-financed Investments	-128	-135	
Free cash flow	-1.9	-7.2	
Net debt	804.4	870	
Net debt/Gross profit (EBITDA)	4.6	5.0	

2/ FINANCIAL STATEMENTS FOR GARES & CONNEXIONS DIVISION (AS PER IFRS)

Income statement

(€ million)	31 December 2010	31 December 2011
Revenue	1,134	1,166
Purchases and external charges	-807	-819
Payroll costs	-109	-122
Taxes and duties	-43	-51
Gross profit (EBITDA)	175	175
Operating profit	80	69
Finance costs	-35	-40
Net profit from ordinary activities	29	20
Net profit for financial year	29	19
Less depreciation and provisions	99	108
Less income from assets disposal	-4	-6
Operating cash flow after net financial debt and taxes	123	121





Balance sheet

(€ million)	31 December 2010	31 December 2011
Intangible assets	8	9
Property, plant and equipment	2,488	2,637
Investment subsidies	-922	-981
Non-current assets	1,575	1,666
Operating assets	117	129
Cash and cash equivalents	17	17
Current assets	134	146
TOTAL ASSETS	1,710	1,812
Gares & Connexions division equity	713	724
Non-current provisions	5	8
Non-current financial liabilities	344	878
Non-current liabilities	349	886
Current provisions	16	13
Operating liabilities	154	180
Current financial liabilities	478	9
Current liabilities	648	202
TOTAL EQUITY AND LIABILITIES	1,710	1,812

Cash flow statement

(€ million)	31 December 2010	31 December 2011
Operating cash flow after net financial debt and taxes	123	121
Changes in working capital requirement	-42	20
Changes in tax accounts	-1	-14
Less net financial debt	35	40
Cash flow from operations	116	167
Acquisition of tangible and intangible assets	-162	-171
Sale of tangible and intangible assets	3	7
Transfers between activities and changes in scope	-457	-56
Investment subsidies received	33	35
Cash flow from investments	-582	-184
Changes in borrowing	-16	534
Dividends paid	-16	-8
Cash flow from financing activities	-67	487
Changes in cash position	-534	469

Source: Gares & Connexions end-of-year accounts

3/ COMPENDIUM OF LEGAL AND STATUTORY TEXTS GOVERNING GARES & CONNEXIONS DIVISION AND OPINIONS AND DECISIONS OF ARAF

EC regulation:

Regulation No. 1371/2007 of the European Parliament and of the Council of 23 October 2007.

EC Directive:

Directive No. 2001/14/EC of the European Parliament and of the Council of 26 February 2006.

French Transport code:

Articles L.2000-1 to L.2252-1.

French Acts:

- Act No. 85-1153 of 30 December 1982 providing a framework for French domestic transport.
- Act No. 97-135 of 13 February 1997 creating the public railway enterprise "Réseau Ferré de France" with a view to the renewal of railway transport.

French Decrees:

- Decree of 22 March 1942 providing public administration regulations for the policing, safety and operation of railways in the general and local interest.
- Decree No. 89-109 of 18 February 1983 pertaining to the Articles of Association of the state-owned industrial and commercial enterprise (EPIC under French law) called "Société Nationale des Chemins de Fers français" (SNCF).
- Decree No. 83-817 of 13 September 1983 approving the terms of reference for SNCF.
- Decree No. 83-816 of 13 September 1983 pertaining to the property of SNCF.

- Decree No. 97-444 of 5 May 1997 pertaining to the missions and Articles of Association of Réseau Ferré de France (RFF).
- Decree No. 97-445 of 5 May 1997 constituting the initial estate of the RFF public enterprise.
- Decree No. 97-446 of 5 May 1997 pertaining to charges for use of the French national rail network collected on behalf of RFF.
- Decree No. 2001-1116 of 27 November 2001 pertaining to the transfer of competency for regional public transport.
- Decree No. 2003-194 of 7 March 2003 pertaining to the use of the French national network.
- Decree No. 2012-70 of 20 January 2012 pertaining to passenger stations and other railway network service infrastructure.

The Rail Activities Regulatory Authority (ARAF):

- Opinion of ARAF No. 2011-002 of 2 February 2011 pertaining to National Network Reference Document for 2012.
- Decision of ARAF No.2011-018 of 19 October 2011 pertaining to the separation of accounts for SNCF's station management activity.





View Gares & Connexions publications
at www.gares-connexions.com:

- Proceedings of 2010, 2011 and 2012 Stations Forums
- Proceedings of the 2010 and 2011 Cities and Stations conferences
- Press packs for the Rhin-Rhône TGV stations and the new Paris-Saint-Lazare station
- Annual reports for 2010 and 2011

Gares & Connexions on social networks:

 <http://www.facebook.com/bonsplansdemagare>

 <http://twitter.com/ConnectGares>
http://twitter.com/infos_gares

 http://fr.foursquare.com/infos_gares

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