

nextstation
PARIS 2007

Quel modèle pour les Gares ? *Which model for stations?*



Les gares en Europe, panorama
An overview of European stations environment



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An overview of European stations environment

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New stations in Europe



◀ Gare de Strasbourg (France)



Berlin Hauptbahnhof (Germany) ▶



◀ Saint Pancras Station (Great Britain)



St. Pancras Station in London



◀ Arcade



Champagne bar

Circle ▶



Innovations in station management

- “*Branding Policy*” in Spain
 - Improving the quality of Spanish stations
 - Two registered brands



Las tiendas de la estación



Vialia

Estación María Zambrano

* Concept will be explained by Mr Ventura in the round table “*Services in stations, a few key innovations*”



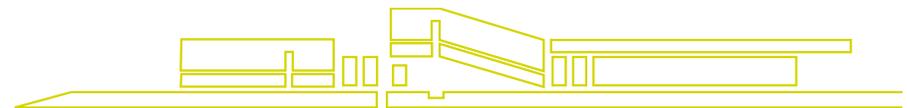
Innovations in station management

- “*Communicating Station*” in France
 - Communicating with all customers in real time in or outside the station



▲
Flat screen
Gare de Strasbourg

▶ **Remote information**
e.g. Paris Gare de l'Est



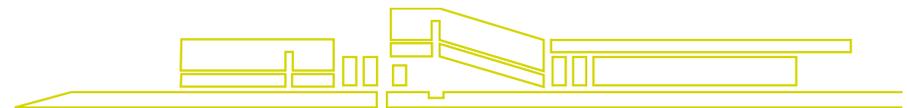
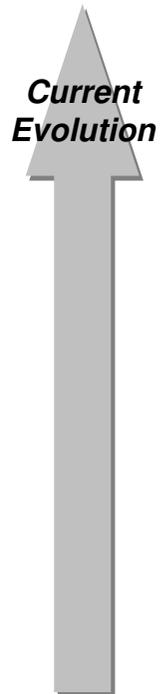
UIC Stations Managers' Group (SMG)

<p>Railway Business / Contracting</p>	<ul style="list-style-type: none"> • Regulation & Rules (e.g. PRM) • Services & Contract Management • Safety & Security • ... 	<p>Benchmarking and best-practices</p>	<p>Synergies (e.g. joint purchasing)</p>	<p>Harmonization (e.g. station alliance)</p>	<p>Joint lobbying (e.g. at EU level)</p>
<p>Commercialization / Renting</p>	<ul style="list-style-type: none"> • Productivity of space • Competition with outside business • Trade-off with railway business • ... 				
<p>Real Estate / Buildings</p>	<ul style="list-style-type: none"> • Affordable construction • Funding: Public & PPP • Relations with community • ... 				
<p>Station Management</p>	<ul style="list-style-type: none"> • Stations within railway organization • Management of station • ... 				



Major differences in how stations are organized in Europe

		Number of Stations	Ownership	Legal Structure	P & L / Balance sheet
GERMANY		5 400	Infrastructure	Business Unit	P & L Balance Sheet
NETHERLANDS		385	TOC	Business Unit	P & L Balance Sheet
SPAIN		94	Infrastructure	Business Unit	P & L
		1 474		No	-
FRANCE		168	TOC	Direction in a BU	P & L
		2 872		No	-
ITALY		2 203	Infrastructure	Direction	P & L
ENGLAND		2 517	Infrastructure	No	-



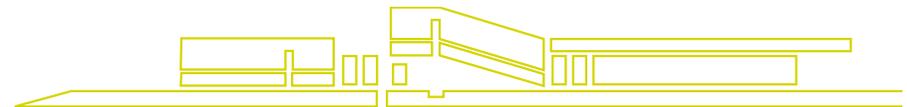
Who owns stations ?

Only few exceptions from infrastructure ownership



- In every country, platforms are owned by the entity that also owns the tracks
 - Except for transversal platforms in French big stations, owned by the TOC (SNCF), not by infrastructure (RFF)
- Two visions co-exist in terms of Passengers Building ownership
 - Train operating Companies own Passengers Buildings
 - Infrastructure company owns Passengers Buildings

▪ Stations owners are State owned, except *Networkrail* in UK, a "not for dividend" limited company



Who operates stations ?

Two stations operating models co-exist in Europe

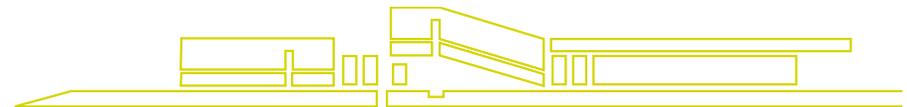


Model 1

- Infrastructure company operates stations facilities
 - Italy / RFI : sub-contract with *Grandi Stazioni* and *Centostazioni* for commerces and site management
 - Germany / DB Station & Service AG : Subsidiary of *DB Infrastructure and Services*
 - Great Britain / Network Rail : 17 key stations directly operated
 - Spain / ADIF : Independent BU (94 stations) and parts of BUs Circulacion (437) & patrimonio (564)

Model 2

- Train operating companies operate station facilities
 - France / SNCF : DDGE (168 key stations) in BU VFE, regional stations (2 872 stations) in BU *Proximités*
 - Netherlands / NS poort : Business Unit of NS
 - Great Britain / TOC : main TOC in station for smaller stations (2 504 stations)
 - Spain / RENFE : operates 489 stations



What are the prospects for the future ?

- Liberalisation of international passenger traffic by 2010 (Third Railway Package)
- EU legislation requires non-discriminatory access and transparency of price calculation
- Stations establish themselves more and more as own business inside the railways

