Quel modèle pour les Gares ?

Which model for stations?

Les gares en Europe, panorama

An overview of European stations environment
An overview of European stations environment

Oliver SELLNICK
Director of the UIC Railway Undertakings Department
New stations in Europe

Gare de Strasbourg (France)

Berlin Hauptbahnhof (Germany)

Saint Pancras Station (Great Britain)
St. Pancras Station in London

Arcade

Circle

Champagne bar
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)

<table>
<thead>
<tr>
<th>Category</th>
<th>Topics</th>
</tr>
</thead>
</table>
| **Railway Business / Contracting** | - Regulation & Rules (e.g. PRM)  
- Services & Contract Management  
- Safety & Security  
- ...                           |
| **Commercialization / Renting**   | - Productivity of space  
- Competition with outside business  
- Trade-off with railway business  
- ...                           |
| **Real Estate / Buildings**      | - Affordable construction  
- Funding: Public & PPP  
- Relations with community  
- ...                           |
| **Station Management**           | - Stations within railway organization  
- Management of station  
- ...                           |

#### Synergies (e.g. joint purchasing)  
- Synergies between similar stations

#### Harmonization (e.g. station alliance)  
- Harmonization at regional or national level

#### Joint lobbying (e.g. at EU level)  
- Joint lobbying efforts at the EU level
Major differences in how stations are organized in Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Stations</th>
<th>Ownership</th>
<th>Legal Structure</th>
<th>P &amp; L / Balance sheet</th>
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</thead>
<tbody>
<tr>
<td>Germany</td>
<td>5 400</td>
<td>Infrastructure</td>
<td>Business Unit</td>
<td>P &amp; L Balance Sheet</td>
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<td>Netherlands</td>
<td>385</td>
<td>TOC</td>
<td>Business Unit</td>
<td>P &amp; L Balance Sheet</td>
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<td>Spain</td>
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<td>Infrastructure</td>
<td>Business Unit</td>
<td>P &amp; L No -</td>
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<td>France</td>
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<td>TOC</td>
<td>Direction in a BU</td>
<td>P &amp; L No -</td>
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<td>Italy</td>
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<td>Infrastructure</td>
<td>Direction</td>
<td>P &amp; L</td>
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<tr>
<td>England</td>
<td>2 517</td>
<td>Infrastructure</td>
<td>No</td>
<td>-</td>
</tr>
</tbody>
</table>
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

- 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 BU circulacion (437) & patrimonio (564)

- 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