

Fiscal Stimulus for Railways in France

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David Hinchliffe
Rail Sector Specialist
UKTI France

Summary

- Overview of the French FSI
- Details of the Rail Sector elements
- Recent Developments in France
- Major Rail Infrastructure Projects
- Main Players
- Help and Information
- Next Steps

French FSI

- 'Plan de Relance' - announced in Dec 2008
- Total of €26.5bn, of which €10.5bn in 2009
- '1000 Projets' (490 started to date)
- Infrastructure (road, rail, canals, ports, electricity)
- Public Buildings (schools, prisons, museums, etc)
- Automotive (car scrappage scheme)
- Housing (social housing, renovation, 0% loans)
- Defence (arms programmes, housing, etc)
- Public Sector Cos (SNCF, RATP, EdF, La Poste, etc)

Rail Elements of the FSI - 1



- Renewals and upgrades to rail infrastructure
€300m contribution to €1.2bn total spend on track, signalling, bridges, tunnels, stations and electrification
- New rail infrastructure
€150m contribution to €7bn total spend in period 2007-2013
- New High Speed Lines (LGVs)
€79m towards preparatory works, studies and land purchase (4 lines)

Rail Elements of the FSI - 2

- SNCF: €400m in 2009 + €300m in 2010
 - new TGV, suburban and regional train sets
 - renovation of rolling stock and stations
- RATP: €450m in 2009
 - upgrades to two metro lines
 - renovation of rolling stock
 - new rolling stock for RER line A

Recent Developments

- 1997 - Separation of infrastructure from opps.
- 2003 - CIADT list of 50 major projects
- 2005 - Audit of French rail network
- 2006 - Opening of rail freight market
- 2008 - Grenelle environment summit
- 2008 - Haenel report on rail reform
- 2008 - Keller report on railway stations
- 2009 - Creation of a Rail Regulator
- 2010 - Opening of intl. passenger market

Major Rail Projects

- High-Speed Rail Lines: €70bn
 - 2,000 kms of new line by 2020
 - Further 2,500 kms over next 10-15 years
- Light Rail Systems: €17bn
 - 1,500 kms of new line by 2020
- Paris Region Projects: €35bn
 - Orbital automatic metro system (€21bn)
 - Charles de Gaulle Express (PPP)
 - Numerous other projects

New High-Speed Lines

- LGV Est phase II (Baudrecourt-Strasbourg)
- LGV SEA (Tours-Bordeaux)
- LGV BPL (Le Mans-Rennes)
- CNM (Nîmes-Montpellier bypass)

- LGV Rhin-Rhône (3 branches around Dijon)
- TransAlpine (Lyon-Turin)
- LGV PACA (Marseilles-Nice)
- LGV Paris-Amiens-Calais
- LGV Paris-Clermont Ferrand-Lyon

Main Players - Operators

- SNCF
- RFF
- RATP
- 22 French Towns with tram or metro systems
- Private sector urban transport operators
- Rail Freight operators
- Eurotunnel

Main Players - Rolling Stock



- Alstom Transport
- Bombardier
- Siemens
- CAF (CFD Bagnères)
- AnsaldoBreda (STP, ex-CLBI)
- Lohr Industrie
- IGF-Arbel
- Socofer
- Several other refurbishment companies

Main Players - Suppliers

- Faiveley Transport
- Delachaux Group
- Compin Group
- Freinrail (Knorr-Bremse)
- Valdunes (GHH)
- Corus Rail
- Vossloh Cogifer
- Sateba

Main Players - Infrastructure



- Colas Rail (Bouygues)
- ETF (Vinci)
- TSO
- Meccoli
- Vecchietti
- c.50 other smaller contractors
- Systra, Inexia, Xelis, SNCF Intl., RATP Devt.
- Egis Rail
- Arcadis
- Ingérop

Help and information

- UK Trade & Investment
 - Local Trade Team
 - Overseas Offices
 - Rail Sector Specialist (Bob Docherty)
 - FCP Specialist (Paul Corcut)
- Railway Industry Association
- Rail Alliance
- Derby Rail Forum
- French Trade Associations (FIF, AIF)
- Operators websites (SNCF, RFF, RATP, etc)
- OJEC (TED Europa)

Next steps

- Market Research
- Visit the market
- Find the right business partner
- Adapt your product or service
- Achieve a local presence
- Provide ongoing support

Thank you for your attention

Any questions ?

david.hinchliffe@fco.gov.uk