About this report

This is Keolis’ first integrated annual report. It provides a concise yet holistic and forward-looking view of the Group’s activities, ecosystem, strategy and commitments. It demonstrates how our strategy and organisation enable us to create sustainable value for all our stakeholders.

As an “integrated” report, it combines aspects relating to our strategic objectives and challenges with everything expected from a traditional annual report, such as key financial targets and performance information. Combining social and environmental information with financial data provides a clear picture of Keolis’ impact on society.

This report was produced jointly by the Group’s various functional teams. As such, it gave us the opportunity to collectively think about the fundamentals underpinning how we create value, our new strategic priorities and our multi-dimensional approach to performance.

It is based on the principles of integrated reporting and thinking advocated by the International Integrated Reporting Council (IIRC). The report reviews the delivery of our CSR commitments and our main overall performance results. It features four main sections: “The Keolis ecosystem”; “The Keolis way”; “Creating value” and “Transformation strategy”.

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To keep pace with today’s fast changing world, we are committed to developing and deploying innovative solutions that meet the challenges facing the transport sector.

The Keolis ecosystem

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First commuter rail contract in Australia (Adelaide)
The South Australia Department for Infrastructure and Transport chose our Australian subsidiary Keolis Downer to enhance the passenger experience and provide more connected mobility solutions for the 14 million people who use the Adelaide rail network every year. It’s the first time that this network, which spans 132 km and 89 stations, has been awarded to a private operator.
In 2021, in the wake of the global health crisis, we updated our materiality matrix to identify the biggest challenges likely to impact our business. To constructively inform our CSR strategy, we asked more than 180 internal and external stakeholders around the world to rank the importance of material topics.
The climate emergency

From fires to floods and extreme weather events, the effects of climate change and the decline in biodiversity due to human activity are being felt more frequently and more intensely.

In a recent survey by the Pew Research Center, 70% of people in 14 countries said they think climate change is the most serious threat to our future and numerous studies have now underlined the impact of air pollution on health. As awareness and understanding of environmental issues grow, many companies are exploring new ways of reducing the impact of their activities on the environment.

In the mobility sector, public transport operators are advising and supporting cities and communities in transitioning to cleaner energies in order to curb greenhouse gas emissions and other pollutants from their networks.

Partnering with the authorities for the energy transition

“By offering alternative mobility solutions to private cars and thereby reducing their use, we are actively contributing to the fight against climate change. But it’s not enough. We go further by partnering with public transport authorities in the sector’s energy transformation. Keolis has operational experience with all the alternatives to diesel fuel — natural gas, biogas, electric and hydrogen — and we work closely with vehicle manufacturers. So, we’re well placed to support the public transport authorities with their fleet renewal programmes.

At the same time, we’re forging ahead with our own ecological transition to reduce the impact of our activities on the environment. We’re rolling out a sustainable purchasing policy, making our buildings even more energy efficient, acting to protect water resources, recycling a greater proportion of waste and training our drivers in eco-driving.”

“Carbon neutral by 2030, now that’s a strong policy decision! This is the choice made in 2016 by Movia, the transport authority for Copenhagen and the Zealand region, which has a population of 2.7 million. Since then, we’ve been investing heavily in green public transport, especially electric buses. First to help fight global warming, of course, but also for the health and quality of life of citizens. We no longer want noise in our cities, nor pollution caused by NOx and particulate emissions. For this reason, Movia’s mobility plan will see the replacement of all diesel buses by electric or biofuel vehicles by 2030. We will have 40% electric buses in Copenhagen by 2022 and 23% in the entire region. By working with Keolis, recognised for their expertise in alternative energy buses, we’re further accelerating the transition. Keolis will put 42 electrically powered buses into service in 2021 and 2022, then three more in 2025. We’re also leveraging the ripple effect created by initiatives launched in the capital, which is hugely beneficial for the rest of the country. Movia contracts for electric bus services now run for ten years, whereas before, for diesel bus services, they ran for six years with up to three potential two-year extensions. But for this project, we convinced the authorities to update the regulatory framework so we can pursue the transformation of our fleet as a long-term commitment.”

Patrizia Gatti-Gregori, Director of Sustainable Development and Community Engagement, Keolis Group

Dorthe Nøhr Pedersen, Executive Director for Movia Public Transport

COPENHAGEN AND ZEALAND REGION – DENMARK

Carbon neutral by 2030

“We’re forging ahead with our own ecological transition to reduce the impact of our activities on the environment.”

Drawing on our expertise, we help them choose the right vehicle and infrastructure solutions for the cities and regions they serve and find the necessary finance and subsidies. At the same time, we’re forging ahead with our own ecological transition to reduce the impact of our activities on the environment. We’re rolling out a sustainable purchasing policy, making our buildings even more energy efficient, acting to protect water resources, recycling a greater proportion of waste and training our drivers in eco-driving.”

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Seamless transport in urban and rural areas

The health crisis, which has seen the use of cycling, walking, carpooling and electric scooters increase in cities, has simply accentuated a trend underway for several years: people want to be able to travel whenever, wherever and however they like – and change their minds at the last minute. Mobility is also a major factor in social and regional disparities. In rural or in less populated areas, people often have little choice but to travel by car, since shared mobility services are scarce, and in some cases non-existent. What’s more, if they are too young, too old or have mobility-related vulnerabilities and are unable to drive, their options for getting around are very limited. This phenomenon can also be found on the outskirts of cities that are poorly served by traditional modes of transport like metro, tram and bus. The lack of connections to the main network makes it harder for them to access employment and amenities in the city.

“We offer public transport authorities a rich array of modes to meet expectations for multimodal travel.”

Schéhérazade Zekri,
Director, New Mobilities, Keolis Group

On-demand transport for more mobility choices in outlying areas

“In 2020 we trialled two real-time on-demand transport services, operated by Keolis Downer, to provide more mobility choices in Mount Barker and the Barossa Valley, located 30 km and 60 km, respectively, from South Australia’s capital city, Adelaide.

This was the first time we tested an app-based public transport service, and we were impressed with the rapid uptake and popularity of these services, particularly in Mount Barker, which we decided to extend in 2021 due to the high levels of demand. Keoride is a highly flexible and efficient transport solution that is adapted to people’s needs, customers can book a ride whenever and whenever it suits them.

In Mount Barker, since January 2020, more than 100,000 Keoride trips were delivered, while in the Barossa Valley, the service has proved extremely popular with commuters, showing just how effectively this kind of service can meet people’s daily transport needs. Real-time on-demand transport encourages more people onto public transport, by addressing the first and last mile connectivity issue. Providing more efficient, flexible and inclusive transport services is essential to encourage people out of their cars, and we will continue to drive innovation to deliver services that are adapted to the needs of our communities.”

Tony Braxton-Smith,
Chief Executive of the Department of Transport

The Keolis Ecosystem

Provide a complete range of customisable mobility services

“We offer public transport authorities a rich array of modes to meet expectations for multimodal travel. After a close analysis of their territory, we work hand in hand with them to select the best solutions for meeting the expectations of communities, in line of course with the local authority’s budget. Possibilities include autonomous shuttle services for the first and last mile and real-time on-demand transport to replace traditional, often underused bus routes or to serve outlying and rural areas. Carpooling schemes and active transport like walking or cycling, available via self-service bikes or long/short-term bicycle rental services, are other options for matching new lifestyles and work practices, as the traditional ‘commute’ changes for ever.”

Schéhérazade Zekri,
Director, New Mobilities, Keolis Group

2020 Integrated report
Constantly adapting

Usage patterns and consumption trends are constantly evolving, driven by our changing and ever more digital lifestyles. People want shared mobility services that are more closely tailored to their individual needs. They want the choice of different modes and expect the simplest and most seamless experience at all stages of their journey. People are used to having instant access to information, so they also expect to be able to make changes to their journey at any time, depending on traffic and their destination.

With the Covid-19 pandemic, other requirements have emerged, like being able to choose your mode of transport depending on when it’s less crowded. At the same time, transport authorities want closer insights into mobility and usage patterns in their areas so they can better calibrate their networks and tailor services to people’s evolving needs and expectations.

“Data enables us to adjust the services we offer and be even more agile and resilient.”

Arnaud Julien, Director of Innovation, Data and Digital, Keolis Group

Making data a catalyst for transformation

“The digital transformation is first and foremost a transformation of usage and behaviour patterns. Like digital, data is a catalyst and an accelerator. It enables us to adjust the services we offer and be even more agile and resilient, because it gives us ever closer insights into usage patterns and helps us better manage our operations and maintenance. For example, real-time and predictive knowledge of passenger numbers in our vehicles is a key element, as it lets us provide clear and accurate information about crowding. Analysis of passenger GPS data across all forms of mobility gives us a closer understanding of usage patterns and how they’re changing in a geographic area. This type of analysis is especially important today during the health crisis, when behaviours are constantly changing.”

“Making data a catalyst for transformation”

Hanna Cockburn, Director of the Transportation Department, Greensboro, North Carolina

Detailed analysis of passenger journeys using GPS data from their phones

“In Greensboro, all bus passengers have to go via the city centre, because it’s where the multimodal hub is located and where they make their connections to other routes. We recently launched our comprehensive 2040 project to transform Greensboro, and we now want to re-evaluate our mobility offering to better meet actual passenger needs. Keolis, which manages our 21 routes, proposed an innovative way to collect GPS data on passenger movement patterns from their smartphones as they travel around the city. We ran Keolis Evolve for three months, from September to November 2020, to determine their final destinations and how they get there.

This data, once analyzed, is a tremendous source of insights. It will help us better scale our offering, with new stops and/or new schedules, and build a more equitable, accessible and desirable transport service for passengers.”

GREENSBORO (NORTH CAROLINA) – UNITED STATES

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Greater mobility at lower cost

All around the world, the Covid-19 pandemic had a huge impact on public transport ridership in 2020. With public finances already under pressure before the crisis, transport authorities are more concerned than ever about optimising spending on their networks. This priority was top of mind throughout the year, due to the drop in revenues coupled with additional expenses, such as disinfection. And it will likely stay this way for years to come, given the extent of the economic crisis.

At a time when most authorities continue to make shared mobility a priority in the fight against climate change, as well as a driver of local and regional development, expectations are higher than ever for operators to advise and accompany authorities in delivering more efficient and effective transport solutions at lower cost. In doing so, operators support authorities in addressing citizens’ mobility needs and regional development challenges.

“The nonstop dialogue is indicative of the quality of our relations with PTAs and has allowed us to reach agreements with almost all our PTA partners.”

Jean-Michel Archambault,
CFO France, Keolis Group

Optimising performance through a unique partnership approach

“Our role is to manage routine business but also exceptional circumstances through constant dialogue with PTAs.

As soon as the first lockdowns were announced, we worked with PTAs to implement effective measures to optimise operations while continuing to deliver our public service mission and provide the right level of network services for passengers and protect jobs as far as possible. This nonstop dialogue is indicative of the quality of our relations with PTAs and has allowed us to reach agreements with almost all our PTA partners. Our partnership approach, which is one of our greatest strengths, is backed up by our expertise in all aspects of mobility systems, from service design to operations, maintenance, marketing, asset management, financial engineering and spend optimisation on behalf of customers. We’re committed to helping PTAs manage their spending as efficiently as possible and roll out their modernisation projects at a time when the crisis has underlined the importance of public transport in our cities and regions.”

“With the ongoing health crisis, we expect our transport operator to be especially responsive in adapting operations and passenger information to the evolving situation and government decisions. Because the crisis has made us think again about how we live and work, we also need innovations and new services, like providing transport options for healthcare workers. As a result, we need an operator with the courage to keep pushing forward. Looking beyond the crisis, we’re keen to see what future mobility and usage trends will look like. Because while we need to be more cautious, due to the more complex financial equation, the crisis doesn’t change our projects and our ambition to speed up the modal shift, which is crucial for the future development of our city and surrounding area. We have a solid partnership with Keolis, and the company is delivering on our key expectations. From the early days of the crisis, its teams were on hand to assist us and made their expertise available for the benefit of the public.”

Nicolas Joyau,
Deputy Mayor of Caen, with responsibility for urban planning, and Vice President in charge of mobility for the Caen-la-Mer urban community

A decisive partnership in the health crisis

Nicolas Joyau, Deputy Mayor of Caen, with responsibility for urban planning, and Vice President in charge of mobility for the Caen-la-Mer urban community
Growing skills for the future

In all countries, public transport operators are faced with the same challenge of an ageing population combined with the sector’s declining appeal to jobseekers, especially the most well-known jobs like drivers and mechanics. Hence the need to attract new talent in the years ahead – something which is proving difficult. Over the next decade, Keolis, whose average employee age is 46, will have to replace 25% of its global workforce. On top of this challenge is the changing nature of jobs and skills across all networks. As fleets shift to green and autonomous vehicles, operators need to build on existing skills or acquire new ones in order to operate and maintain new fleets including alternative energy buses and autonomous shuttles, which ultimately will have no crew onboard.

“‘We want to attract candidates who choose to work at Keolis, not because they have no other options, but because they share our values and our commitment to the common good.’

Clément Michel, Director of Human Resources and Transformation, Keolis Group

Attracting and retaining local talent

“To meet our future skills needs, we’ve completely revamped our employment policy. In addition to promoting the new Keolis employer brand conveying our unique employee experience in all countries where we operate, our recruitment policy now focuses more on soft skills, motivation and engagement, rather than just technical experience. As a result, we’ve been able to grow our pool of diverse talent to include more youngsters, senior profiles, people who have retrained after losing their job due to the current crisis, migrants, people with disabilities, and so on. We see diversity as a source of strength for our company, as well as reflecting the diversity of our passengers, so we’ve forged partnerships with local and national players involved in employment, training, retraining, career transition, back-to-work schemes, and non-profit organisations. This policy also boosts the contribution we make to local communities, a commitment underpinning our approach to corporate social responsibility made all the more important by the devastating impact of the health crisis on jobs. However, our revamped policy isn’t intended simply to boost job applications; to ensure they stay, we want to attract candidates who choose to work at Keolis, not because they have no other options, but because they share our values and our commitment to the common good. This goal lies at the heart of our human resources policy, which is geared to activating all possible employee loyalty and engagement levers, especially by growing skills and offering people rich and rewarding professional development opportunities.”

“Capitalising on soft skills to attract more diverse profiles

“Under our partnership with Keolis, we provide expertise in engineering, recruitment and training to support and assist people from sectors hit by the Covid-19 crisis who want to make a career transition. We identify people whose jobs are under threat in the short to medium term and who are keen to move into a different line of work without having to relocate. We present the career opportunities available at Keolis, arrange an initial meeting with the Group’s HR department, and then establish a suitable training path to harness their existing skills and add new ones. For example, people with experience in the hospitality industry who have a flair for customer service, teamwork and attention to detail – all qualities which correspond to our needs in several job families. Keolis’ focus on sourcing from different backgrounds and capitalising on individuals’ soft skills is a powerful lever for retaining talent, strengthening employee engagement and encouraging people to be open to new ideas. In short, it’s exactly what the Keolis employer brand is about!”

Nadine Guérin, Development Director at LHH, Adecco’s HR consultancy
Growing need for reassurance

Since the early days of the pandemic, passengers have expressed concerns about the risk of infection when travelling on public transport. These concerns are likely to last and are accentuated by issues of passenger density on high-capacity systems like trains, metros and trams, especially at peak hours. And yet numerous studies worldwide – including those by UK transport watchdog Transport Focus, Oxford Academic, Institut Robert Koch, Santé Publique France and the University of Colorado – have all confirmed the very low risk of contamination on public transport. Nevertheless, passengers expect tangible and visible measures to be taken. In terms of ridership, most networks have yet to return to pre-Covid levels, with some people preferring cars and others travelling less due to home-working.

Sharing local best practices for the benefit of all customers

“Our subsidiaries rallied to the cause from day one when the pandemic hit, first in China and then all other countries. They anticipated the needs of public transport authorities, which faced an unprecedented situation and wanted us to devise additional solutions. Hygiene measures were stepped up with hand sanitiser made more readily available, a step change in disinfection of vehicles, stations and air-conditioning systems and the introduction of social distancing measures. At the same time, we also adapted the transport offer to maintain services for key workers during lockdown and then later to enable social distancing when normal services were resumed. In addition, several networks which hadn’t yet done so implemented digital payment solutions, which helped reassure passengers. The Keolis crisis management unit set up in March 2020 enabled teams from the countries first hit to share lessons learnt and best practices with other operatives, including innovative disinfection solutions.”

— Thierry Guinard, Safety Director, Keolis Group

Protecting passengers and retaining their trust

“Keolis Dijon Mobilités, our operator, has given us complete support throughout the crisis, maintaining smooth, ongoing dialogue at all times. This has allowed us to work together to ensure continuity of service across our networks and respond swiftly to the almost never-ending updates on Covid rules and protocols so that passengers can travel in complete safety. We adjusted service and capacity as ridership dropped but teams maintained a high-quality service for frontline workers. Keolis Dijon did everything within its power to protect both staff and passengers to ensure we retain their trust. Actions included making substantial changes to infrastructure on vehicles and to daily cleaning routines which saw ozone used in some cases, as well as the wider rollout of open payment systems and passenger information and awareness campaigns. Despite the crisis, together we are upgrading the network by increasing tram capacity and launching hydrogen-powered buses in the coming months.”

— Thierry Falconnet, Vice President Dijon Métropole, in charge of urban renewal, mobility and transport, and Mayor of Chenôve
Our vision is one of shared mobility as a driver for enhanced quality of life in every community we serve, and as a solution to today’s major environmental, social and economic challenges.
With operations in 16 countries, Keolis is a leader in the global shared mobility market, facilitating the journeys of millions of people every day. We are the preferred partner to many public transport authorities around the world, co-designing effective and sustainable solutions with them to boost their local economies and help create more attractive places to live and work.

Company profile

Keolis, a world leader in mobility

- 68,500 employees
- 21.7% women
- €6.1bn revenues in 2020 (€6.6bn in 2019)
- Recurring net profit: €47M in 2020 (€418M in 2019)
- Recurring Ebitda: €532M in 2020 (€418M in 2019)
- 6,100 rental bikes and 7,600 self-service bicycles
- 4,054 buses run on alternative fuels, of which 2,029 are powered by natural gas or biogas

Australia, Belgium, Canada, China, Denmark, France, Germany, India, Netherlands, Norway, Qatar, Senegal, Sweden, United Arab Emirates, United Kingdom, United States
Our Corporate Purpose

The Corporate Purpose we set out in 2020 sums up both the role we fulfil on a daily basis and our commitment to addressing the challenges facing society today.

“Enhance everyday life in cities and communities by imagining and operating safe, smart and sustainable mobility solutions accessible to each and everyone”.

Our Corporate Purpose underlines what we think matters in mobility.

Innovative and sustainable mobility solutions for a better and more environmentally-friendly transport offer.

Shared and inclusive mobility solutions which enhance accessibility for everyone.

Mobility solutions that bring communities closer together and contribute to their vitality.

Multimodal and reliable mobility solutions offering complementarity and interconnectivity.

As climate, social and economic issues compel companies to reinvent their business models, Keolis announced its Corporate Purpose in 2020. To formulate it, we asked our stakeholders to consider two fundamental questions: what do we do for our customers and how can we have a real impact on the social and environmental challenges facing the world?

Our Corporate Purpose addresses both of these questions. It gives meaning to what we do, day after day, and it ties our corporate strategy to the pivotal goal of making a positive impact on society.

Tangible actions, measured by clear KPIs

Our Corporate Purpose endows us with a roadmap for guiding our decisions and actions. Engaging and transformative, it sets out our commitments and actions which deliver benefits to all our stakeholders from public transport and local authorities to passengers, business partners, service providers and community groups.

Four commitments to help achieve our social and environmental goals

Our Corporate Purpose reflects our focus on serving the common good and creating value for all our stakeholders through four ambitious commitments.

First, we aim to help build attractive and sustainable communities. Keolis solutions enable public transport authorities to enhance the vitality and appeal of their cities and communities by creating jobs, making everyday life easier for residents and strengthening the social fabric of the community.

Our second commitment is to act responsibly for the planet. This means contributing proactively in favour of the energy transition, the circular economy and the preservation of biodiversity. By reducing greenhouse gas emissions, our mobility solutions help combat climate change. In all our day-to-day operations, we strive to conserve natural resources and protect biodiversity, and our fleets are becoming increasingly environmentally-friendly.

Our third commitment is to create a value chain that benefits all stakeholders from our suppliers to our funders, clients and passengers. We do this by working hand-in-hand with our public transport authority partners to design and deploy mobility solutions that correspond precisely with their needs.

Our fourth commitment is to our workforce. We are committed to attracting, retaining and supporting talent and providing the right environment for a rewarding employee experience. Our human resources policy actively promotes diversity and inclusion in order to deliver our full potential. We offer our employees training opportunities to develop their skill sets as we prepare the workforce of the future. Ensuring workplace health, safety and well-being for all our staff remains a top priority.

OUR VISION FOR MOBILITY

Our Corporate Purpose underlines what we think matters in mobility.
Keolis’ business model and how we create value

What we do

Design, develop, finance, operate, maintain and promote shared and sustainable mobility solutions for all communities.

The value we create for and with our stakeholders

Expertise and experience
- 19 subsidiaries have rolled out the Keolis Signature Service programme to improve quality of service.
- 26 tools and applications deployed in France so that passengers can freely choose their mode of transport.
- 2 major innovation focuses: Customer experience and equipment & Maintenance.

Finance
- €96m of free cash flow.
- €43m loss in EBIT (K).

Human
- 61% of employees received training in 2020.
- 87% of employees work at a GEEIS (Gender Equality European and International Standard) compliant entity for gender equality.

Environment
- 43% of employees exercise an ISO 14001 certified activity for environmental management.
- 21.6% of total kilometres covered by alternative fuel vehicles.
- 4,038 vehicles running on alternative fuels.
- 4.54 kWh consumed per kilometre for electric traction.

Communities
- 69% of the revenue of French subsidiaries assessed by BIOM (an independent agency that measures companies’ contribution to sustainable development) is acknowledged as being of public utility.
- 49 projects recognised with Coups de Cœur Solidaires (not-for-profit solidarity organization) awards since 2018.
- 44,446 schoolchildren briefed on the safe use of public transport worldwide.

Our strengths
- Agility, adaptability, capacity for innovation and a forward-looking vision to meet changing needs.
- Commitment to listening to and interacting with PTAs, passengers and citizens.
- Local and global footprint allowing us to share experience and expertise.
- Integrated systems in design, operations and maintenance and a worldwide track record in operational excellence.

Our values
- We imagine
- We care
- We commit

Our resources
- Expertise and experience
  - Programme: Thinking like a Passenger, our continuous improvement initiative.
  - Keoscopic: Our unique observatory of mobility trends and (Keo)keys.
  - Capacity for innovation: internal resources and partnerships.

Finance
- Revenues of €1.6bn.
- Total shareholder equity of €465.3m.

Human
- 68,500 employees, including 65% driving staff.
- 7,177 people hired worldwide in 2020.
- Strengthened health and safety protocols for staff and passengers.

Environment
- A range of multimodal mobility solutions that contribute to reducing cities’ and communities’ carbon footprint and environmental impact.
- 4,038 vehicles running on alternative fuels.
- 4.54 kWh consumed per kilometre for electric traction.

Communities
- Founding member of Pimms Mediation network® helping facilitate access to everyday services and amenities.
- Member of the United Nations Global Compact.
- Ongoing dialogue with PTAs to constantly renew transport offers.

Our challenges for mobility players

Ecological transition
New mobility expectations
Operational efficiency
Health & safety expectations
Digital transformation – big data – smart cities
Our strengths
Agility, adaptability, capacity for innovation and a forward-looking vision to meet changing needs.
Commitment to listening to and interacting with PTAs, passengers and citizens.
Local and global footprint allowing us to share experience and expertise.
Integrated systems in design, operations and maintenance and a worldwide track record in operational excellence.

An extensive ecosystem of partners.

Strong employee engagement.

Operational efficiency

Finance

Human

Environment

Communities

Contributing to the UN’s Sustainable Development Goals

(1) Pimms Mediation: Points d’Information Médiation Multi Services (shared multi-service information offices).
(2) GEEIS: Gender Equality European and International Standard.
(3) In partnership with the SNCF Foundation.
Inventing the transport networks of tomorrow means constantly questioning the solutions identified to address mobility challenges. This is achieved through continuous dialogue with all our stakeholders, as reflected in the responses provided hereafter.

How does Keolis intend to restore ridership to its pre-crisis levels?
Frédéric Pissot, Secretary General of the European Works Council, Keolis

A return to pre-crisis ridership levels depends first and foremost on the end of government-imposed travel restrictions, which vary from country to country. We expect that restrictions between countries will be lifted progressively as vaccination programmes bring the virus under control. Restrictions on travel between some countries have already been removed and we anticipate further easing of these restrictions in the coming months. Meanwhile, to boost passenger confidence about using public transport, Keolis is working with other operators and industry organisations to highlight the numerous international studies confirming that there is minimal risk of contamination on public transport when face masks are worn by passengers. Keolis is also implementing other measures to reassure passengers including making vehicle cleaning procedures more visible, deploying contactless ticket purchasing solutions, using real-time people-counting technology to deliver passenger information which helps avoid crowding and encouraging employers, schools and universities to stagger their schedules to alleviate rush-hour congestion. All these factors suggest ridership will return to 2019 levels some time during 2023.

Frédéric Baverez, CEO France, Keolis Group and Chairman of EFFIA

Just like alternative energy vehicles, infrastructure plays a key role in ensuring quality of service and achieving the energy transition objectives set by our transport authority partners. In fact, the two components go hand in hand. That’s why our Centre of Excellence for Busses and New Energies has developed know-how based on a system approach to “clean” mobility, which takes into account all project components: lines to be operated, bus performance and range, configuration of existing depots, on-route and in-dash charging stations and local ‘green energy’ resources. The goal is to provide alternative solutions to society’s mobility needs by exploring the opportunities offered by more environmentally-friendly modes of transport, aligned with each area’s energy policy, whilst maintaining the same level of service.

Pierre Gosset, Industrial Division Director, Keolis Group

Infrastructure plays a strategic role in the deployment of clean mobility solutions. What are Keolis’ priorities in this regard?
Karima Dalli, Member of the European Parliament and Chair of its Transport and Tourism Committee

“I am committed to the deployment of low-emission transport solutions. This will create new employment opportunities while also improving local air quality,” said Karima Dalli, Member of the European Parliament and Chair of its Transport and Tourism Committee. “We must ensure that public transport infrastructure is fit for the future, with a focus on the deployment of electric and hydrogen technologies. We must also ensure that the sector is equipped with the necessary resources to support the transition.”

Karima Dalli, Member of the European Parliament and Chair of its Transport and Tourism Committee

In the future, does Keolis plan to roll out hydrogen-powered vehicles?
Mohamed Mezghani, Secretary General of the International Association of Public Transport (UITP)

“Hydrogen-powered vehicles offer an opportunity to reduce greenhouse gas emissions and contribute to the energy transition. Keolis is already piloting hydrogen vehicles in several cities and we plan to expand this technology in the future,” said Mohamed Mezghani, Secretary General of the International Association of Public Transport (UITP). “However, it is important to ensure that the development of this technology is done in an environmentally-sustainable manner.”

Mohamed Mezghani, Secretary General of the International Association of Public Transport (UITP)

THE FUTURE OF MOBILITY

Dialogue with our stakeholders
The current health crisis and its ongoing impact on ridership has heightened the need for an in-depth review of contractual balances in terms of both risk allocation and contract evaluation as well as the long-term viability of the current economic model and funding streams for public transport. How is a company with a global footprint like Keolis approaching these contractual and economic considerations?

Mohamed Mezghani, Secretary General of the International Association of Public Transport (UITP)

In an increasingly connected and potentially autonomous world, what can be done to improve the shared mobility experience?

Clara Fain, Chief Financial Officer at VIA

At Keolis, our goal is to make mobility easier and more accessible for everyone, whoever we operate. We do our utmost to cater to the needs of specific categories of the population, such as people with financial difficulties or those who aren’t comfortable with digital technology. We’re supported in this regard by partners like the shared multi-service information offices in the FMMN network (see page 41), but also by our employees, and more particularly our customer service teams, who help passengers with their transport pass applications and ensure they benefit from the most appropriate fares.

Arnaud Julien, Director of Innovation, Data and Digital, Keolis Group

How do specific categories of people – like pensioners, for example – apply for a transport pass?

Ophélie Mayrand, passenger on the Twisto network in Caen (Normandy, France)

At Keolis, we fundamentally assume that each passenger’s experience is simple, seamless and intuitive at every stage of their journey that we are able to enhance the shared mobility experience. There are three ways to speed up this transition. Firstly, by providing passengers with personalised information, based on an in-depth understanding of their individual practices and preferences. There’s no point proposing the same multitude of alternatives to every single passenger. It makes a lot more sense to offer passengers a mobility experience that fits their specific needs and takes into account their real-life practices and personal preferences. Secondly, by enhancing how we deliver information to passengers. A good example is the use of a conversational voice assistant, like the “mobility coach” that’s been introduced in Dijon, France. Lastly, we need to look beyond our knowledge of individual practices to understand and anticipate general trends in mobility use. The analysis of GPS tracks is particularly helpful in this respect.

By using all three of these levers, we can offer a shared mobility service that continuously adapts to the passenger and to their environment.

Frédérique Raoult, Communications Director, Keolis Group

As illustrated by the numerous electric buses deployed during the year and by our ongoing commitment to innovative projects like the future introduction of hydrogen buses in Dijon, Keolis didn’t scale back its environmental initiatives in 2020, despite the health crisis. In fact, the crisis highlighted the need to shift to more environmentally-friendly models. More generally, Keolis’ recently announced Corporate Purpose sets out our commitment to operate sustainable mobility solutions. And we are accompanying this commitment with precise objectives and KPIs, including reducing our carbon footprint, which will enable us to align our environmental priorities with our operational objectives.

Bernard Tabary, CEO International, Keolis Group

Environmental action was overshadowed by Covid-related health measures at many companies in 2020. Given the context, which environmental initiatives were postponed at Keolis? And which were maintained or even initiated in 2020?

Geneviève Laferrère, Co-coordinator of France Nature Environnement’s Regions and Sustainable Mobility network

The need for an in-depth review of contractual balances in terms of both risk allocation and contract evaluation as well as the long-term viability of the current economic model and funding streams for public transport. How is a company with a global footprint like Keolis approaching these contractual and economic considerations?

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Creating value

Every day, we strive to exceed the expectations of all our stakeholders and create value across the board.

For employees 32
For communities 34
For passengers 38
For citizens 40

Electric mobility hits the fast lane in Northern Europe

In April 2020, our Danish subsidiary won a contract for the operation and maintenance of 47 buses, including 32 electric vehicles, in the Greater Copenhagen area. Keolis was also renewed as the operator of Odense’s bus network for a further four years - a period which will see the deployment of 20 additional electric buses. In the Northern Jutland area, our contract was also extended for 10 years to operate 67 fossil-free buses in Aalborg.

Moovel, our Swedish subsidiary Keolis Sverige was awarded a four-year extension on the contract to operate 41 bus routes in Stockholm carrying 80 million passengers a year. A further 15 electric buses are due to enter service in August 2022, expanding a fleet that already includes 320 biodiesel and biogas vehicles. 2020 saw Keolis subsidiaries launch new operations in Bergen, Norway, where it introduced 138 fossil-free buses including 102 electric vehicles, and in the Overijssel and Gelderland provinces in the Netherlands, where 246 all-electric buses entered service in December 2020.
FOR EMPLOYEES

The men and women of Keolis are the lead actors in our current success and future development. Our human resources policy focuses on skills and engagement to ensure everyone can do a meaningful job and enjoy a fulfilling employee experience.

What did training involve at the Autonomous Mobility Test Site?

N.K.: Initially, we learned how autonomous shuttles work, then how to be an onboard operator. The operator doesn’t actually drive the vehicle but ensures its safety. He or she intervenes if the shuttle doesn’t do what it’s supposed to, or leaves its lane; the operator can also bypass an obstacle, or even stop the vehicle in an emergency. Next, I participated – and still do – in tests of new shuttle models, including some never used before in France. I’m very proud to have been chosen for this position.

How would you describe your experience?

N.K.: I’m fascinated by new technology and in this case I’m taking part in the creation of a brand-new service, one that will grow to meet needs not currently met by other modes, as is the case here in the rural areas around Châteauroux. It’s also an excellent opportunity to build my skills.

How did this opportunity occur?

N.K.: I joined Keolis twenty years ago, when I passed my bus driver’s licence. I worked as a driver, a mediator and now as a team manager. It’s one of the few companies I know that offers training and opportunities for career progression even when, like me, you don’t start out with any formal qualifications. If you’re determined, you’ll be given a chance!

A pioneer in autonomous shuttles

“I feel like I’m taking part in the creation of a brand-new service.”

Keolis creates its first driver training centre

To expand our pool of candidates, Keolis has seized the opportunity offered by the French law on vocational training called “Avenir” (“Future”), allowing companies to create their own apprenticeship training centres. At the end of 2020, the recruitment process kicked off to find 30 young people, aged 21-29, to form the first promotion of our new training facility that opened in March 2021 in Bordeaux. The aim is to train them as qualified bus drivers within the scope of a six-month apprenticeship, with the offer of a full-time job at the end. A second driver training centre will open in Lyon in the autumn of 2021.

Teams on deck for a fast restart

Because of the Covid-19 pandemic, authorities shut down the metro systems in Hyderabad (India) and Doha (Qatar) for six months. But all employees including drivers, maintenance and support staff remained on hand in anticipation of a very quick service restart, thanks to a proactive communication plan. Operations could be started up again in the space of a few days in September 2020 thanks to this mobilisation, with passengers successfully welcomed back on board metros in complete safety.

First engagement survey

In 2020 we carried out our first global engagement survey, garnering nearly 20,000 responses from 52,000 employees. In addition to measuring their engagement, their expectations of management and quality of work, this new survey has informed Keolis’ actions across its worldwide operations to enhance employee wellbeing and loyalty.

EFFIA reorganizes

In February 2021, EFFIA’s two Parisian offices were combined. At the same time, Keolis’ parking subsidiary set up a new work organisation to foster greater agility, efficiency and a better work-life balance for all employees. EFFIA is counting on an innovative approach to home-working by applying the flex office principle in totally revamped premises featuring open-plan offices. Collaborative working is also facilitated by setting up a number of areas to encourage formal and informal discussions.

CREATING VALUE
FOR COMMUNITIES

Informed by a real understanding of the cities and communities we serve, we work hand-in-hand with public transport authorities to co-develop bespoke solutions that meet their priorities in areas including transitioning to alternative energies, driving economic development and improving quality of life for local citizens.

1 A new network for September 2021
The Blois urban community, which encompasses 43 towns, renewed its contract with Keolis for the operation and maintenance of its transport network for a further eight years. Under the new contract, our subsidiary will completely overhaul the network, where ridership has grown by 38% since 2013, to meet the growing mobility needs of the community’s 110,000 citizens as well as its visitors. The transport offer will be expanded and buses used on the busiest route will be replaced by all-electric vehicles from 1 September 2021.

2 Dijon opts for hydrogen
Dijon Métropole PTA continues to support sustainable mobility with the creation of a short-cycle hydrogen production unit powered by electricity from several renewable energy sources. From the summer of 2021, it will produce 500 kg of hydrogen every day for the fuel cells powering the city’s electric vehicles. The aim is to extend this green technology to the city’s buses the next time they are replaced. Keolis, which operates the Divia network, is supporting the city’s construction of this unit, which is projected to save some 1,750 tonnes of CO₂ a year starting in 2022. That’s the equivalent of 700 round trips between Paris and New York!

3 Second tram contract
The city of Jiaxing in the Chinese province of Zhejiang chose Keolis for the operation and maintenance of its future tram network. Scheduled for launch in summer 2021, the new system is poised to become the main means of transport for the 4.65 million people who live in this fast-growing city. Forecast daily ridership is 50,000 passengers for the initial two lines, which will cover 15.6 km. A third line, stretching over 21 km, is planned for 2023. In addition to this contract win, we hired 200 more people last year, further strengthening our presence in China, where we already operate the Songjiang tram and two automatic metro lines in Shanghai.

Margaret Angela Franklin, Potomac and Rappahannock Transportation Commission (PRTC), Virginia (United States)

What are the needs of people living in the counties served by the PRTC network?
M.A.F.: The area we cover is home to a myriad of individuals with widely varying needs. Some people commute to and from Washington DC. Others commute to work in the north of the state. And of course, we have passengers travelling locally for shopping, medical appointments and so on.

Why did you choose Keolis to operate your fleet?
M.A.F.: We needed to modernise our bus fleet and develop a system that truly meets all the needs of people in the area, with a focus on safe, reliable and enhanced services. In particular, we wanted to introduce new mobility options that would make using the bus a viable alternative to the car. Keolis had already done an exemplary job in the region, earning the trust of the network operating in Northern Virginia and the Washington suburbs. We felt they were the best company for helping us make the right adjustments and successfully complete our transition.

What were your specific needs?
M.A.F.: One of the things we stressed in the competitive procurement process was the importance of diversity, as well as better communicating with PRTC employees and our bus operators, drivers and technicians. Keolis heard us when we told them this was a priority. And they’ve made it their priority! At the height of the Covid-19 crisis, which inevitably impacted our activities, we managed to continue to ensure all essential travel. We’ve got off to a great start with Keolis and they’re doing a terrific job!

Reliability and diversity
“We managed to continue to ensure all essential travel.”
World firsts in the autonomous mobility sector

In Saint-Quentin-en-Yvelines, a major economic hub in the western Paris region, we were awarded the world’s first contract for an autonomous shuttle service subject to the same quality of service commitments as a bus network. The new service, which we began operating in March 2021 for Île-de-France Mobilités – the PTA for the Paris region – is designed to meet the daily transport needs of local people and visitors. Ultimately, the shuttles will provide a free service between the train station and the business district over a stretch of 1.6 km. We’re looking forward to this milestone in autonomous mobility following the successful trials of our first driverless shuttles at our Châteauroux test centre in 2020. This facility is the only one of its kind in France and recently achieved another world first with the simultaneous trials of vehicles designed by three different manufacturers: Navya, EasyMile and Local Motors.

Two new contracts for bus networks

Keolis Transit America was awarded the contract to operate the bus network of Victor Valley carrying 1.5 million passengers each year in the County of San Bernardino, Southern California. The network counts 127 buses, including 91 natural gas and seven electric vehicles. Our American subsidiary was also chosen to operate the OmniRide urban and suburban network, which will carry around four million passengers per year on its 26 routes across three counties in Virginia. All of the 166 buses that make up the fleet are suitable for people with reduced mobility.

Four year contract renewal for the DLR

Our subsidiary KeolisAmey Docklands was awarded a four-year extension to its contract to operate and maintain the Docklands Light Railway (DLR), London’s driverless metro. As part of the renewed contract, KeolisAmey Docklands will have oversight of the commissioning of new metro trainsets due to enter service in 2023. The subsidiary also achieved ISO 55001 certification for its asset management policy on the network which it operates for Transport for London (TfL). Today, DLR is the UK’s busiest light rail system.

How is the environmental approach in the mobility sector different in Nordic countries versus other European countries?

W.K.: First, there’s a cultural reality. Northern countries have a very strong ecological awareness. It’s a vast land with a small population and quite a few areas are still wild. People really respect nature. Then there’s the energy aspect: we have a lot of water, whereas some other countries in Europe don’t have any at all. In other words, green energy is more accessible. But I still think that, above all, it’s political will that makes the most difference. Does that mean we can’t have green mobility without incentives, or without the appropriate organisation? W.K.: Absolutely. You need very strong political will to create effective incentive measures, to “help” people give up their private vehicles and opt for other solutions. By that I mean public transport, of course, but also electric cars and active mobility. In Norway, for instance, development of electric mobility has been so sustained that it’s in the process of becoming the norm. The number of charging stations in the country has exploded. In Bergen, we have the country’s first all-electric bus fleet which is managed by Keolis, like our tram system. As you know, nobody likes to change their habits. It takes time, persuasion and investments.

How do you see tomorrow’s mobility?

W.K.: Easy, I see it as flexible, on-demand and driven by users’ choice. And much more inclusive, with solutions that don’t leave anybody out in the cold, especially in outlying areas! If you want to encourage people to use public transport more often – with the associated environmental benefits – you’ve got to make it the easiest and smoothest possible experience.

Tomorrow’s mobility will be flexible and electric!

“You need very strong political will to create effective incentive measures.”

Wenche Kjølås,
CFO, Grieg Maturitas,
Chair of Keolis Norge
(Norway)

CREATING VALUE
FOR THE BENEFIT OF PASSENGERS

Throughout 2020, we kept up our efforts to offer the most satisfying mobility experience possible, while meeting passengers’ needs to be reassured that it was safe to use public transport.

1. **Contactless payment: simpler, easier, smoother**

Pассengers on our Taneo (Nevers) and Ametis (Amiens) networks can now pay for journeys simply by touching their contactless payment card or smartphone on smart readers when they board the bus.

2. **Fighting Covid-19, everyone’s responsibility**

“Protect yourself, protect others.” Each time lockdown was eased, our subsidiaries around the world ran campaigns reminding passengers that stopping the spread of the virus is everyone’s responsibility. Messages focused on reiterating key guidelines issued by health authorities: wash or sanitise hands before and after travel, wear a face covering on buses and trains and at stations, use contactless payment and follow social distancing guidelines.

3. **Nudges: reassuring passengers and getting them to act responsibly**

Inspired by research into human behaviour, “nudge theory” is based on the idea that, rather than telling people to do things, you ‘nudge’ them to adjust their attitudes in the right direction. Keolis adopted these techniques on many networks from the early days of the Covid-19 pandemic, using short, simple and friendly prompts to encourage passengers to wear a face mask and keep to physical distancing rules. The stickers and graphic signage on floors and windows also helped reassure passengers.

4. **DLR named “rail operator of the year”**

KeolisAmey Docklands, which runs London’s Docklands Light Railway (DLR) network, won the award for Passenger Operator of the Year at the 2020 National Rail Awards. The accolade is recognition of its industry-leading performance and the consistent reliability achieved by DLR set against the challenges of the Covid-19 pandemic.

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**A voice for passengers in Bordeaux**

“Our feedback and expectations are heard and taken into account.”

What are your relations like with Keolis Bordeaux Métropole, which operates the Bordeaux transport network?

C.B.: We’ve always had smooth relations with the Keolis management team. We can contact them directly whenever we need to, as and when issues occur. Every year, we’re also invited to a presentation on feedback regarding the service quality and to other important meetings about the network.

What kind of topics do you raise with Keolis Bordeaux Métropole?

C.B.: Just about anything that affects passengers’ daily travel. This can range from reporting reckless driving to issues with the new ticketing system or online subscription renewals. And they listen to us. A few months ago, for instance, I asked if they could change the onboard announcement made when drivers have to wait a few minutes at a stop for traffic regulation purposes. Ten days later, it was done. We also submit proposals for strategic network upgrade projects managed by Keolis Bordeaux Métropole, always with passengers’ best interests at heart. For example, since not everyone is a digital native, we’ve insisted on taking into account the need for a real-time passenger information solution as part of the new fleet management and passenger information system (SAEIV).

Did you submit any specific requests following the outbreak of Covid-19?

C.B.: I wasn’t quick enough! Keolis Bordeaux Métropole was remarkably proactive in this respect. In March 2020, three days after the start of lockdown, the managing director called to ask what I thought of the measures he was planning. It turned out they went even further than what we’d advocated nationally through the FNAUT passengers’ federation following a consultation of head office and regional presidents. Keolis Bordeaux has been highly responsive throughout and has gone above and beyond our expectations.

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**CREATING VALUE**

2020 Integrated report
FOR THE BENEFIT OF CITIZENS

2020. A year dominated by the pandemic – making life so hard for so many. In response, our subsidiaries introduced a wide range of measures to make mobility even more inclusive and help alleviate the impacts of the crisis. Their actions give real-world expression to our CSR strategy, which pays particular attention to the most vulnerable in society.

1 KeolisAmey Metrolink staff help vulnerable passengers

Over 120 customer service staff on KeolisAmey’s Metrolink tram system were given mental health awareness training by the National Health Service in 2020. The two-day course has helped staff work more effectively with passengers suffering from mental health issues and made them more aware of their psychological needs and better prepared to support services available.

2 Solidarity recruitment at Yarra Trams network in Melbourne

With the support of the State of Victoria, Yarra Trams has hired nearly 300 local people in Melbourne who have been affected by the economic crisis to help keep the world’s largest tram network clean and safe. Some 30 former crew members of airlines grounded by the pandemic have also been recruited by the subsidiary which has delivered real benefits thanks to their customer service skills and focus on safety.

3 Lower barriers to mobility due to unseen disabilities

With the help of an occupational therapist specialising in disabilities, Keolis Quimper in France has raised awareness among frontline staff of the difficulties faced by people with invisible disabilities such as neurological, mental and cognitive disorders and how to provide effective assistance. Training included role-playing with staff working in pairs on the bus network to really understand the experience of the most vulnerable passengers and provide better support.

Inclusion partner

“What making mobility easier for vulnerable people...”

What is PIMMS and its relationship with Keolis?

Keolis sets us two types of missions in the form of a catalogue of services. First, outward-facing mediation, where our staff are tasked on the Keolis networks to facilitate access to mobility and ticket vending machines, to inform and guide passengers and to help prevent antisocial behaviour and fare evasion.

What do you expect of Keolis going forward?

Our partnership is helping us address the important mobility-related issues for the more vulnerable passengers and offer them the widest range of support services in a comprehensive one-stop shop approach. We’re keen to pursue this special relationship with Keolis and continue to benefit from their support as we expand our network into new parts of France.

(1) Pimms Mediation: Points d’Information Médiation Multi Services (shared multi-service information offices).
In a year dominated by the coronavirus pandemic, Keolis reiterated its ambitions to consolidate its leadership in the mobility sector and accelerate its efforts in the energy transition.
and contain our debt. In parallel, we enjoyed a surge of activity on the commercial front with the awards of several major contracts around the world, including the Adelaide commuter rail contract in Australia, new bus contracts in the United States and Denmark, and a second tram contract in China. In addition, we were awarded extensions on contracts to operate several major networks including in Boston, Washington DC, London and Stockholm. At the start of 2021, we won another important contract to operate Dubai’s metro and tram networks. These successes were echoed in France, where, despite a reduction in the number of tenders due to municipal elections, we successfully bid on renewals of all our urban transport contracts, including Blois, Châtellerault, Alès, Oyonnax and Tarbes-Lourdes. We also won several new contracts to operate intercity networks and rolled out an all-electric minibus route in the south-west of Paris for Ile-de-France Mobilités. Thanks to these efforts and our significant business wins, we look forward to returning to growth in 2021.

How did Keolis cope with the health crisis that dominated almost all of 2020?

Marie-Ange Debon: As the unprecedented health crisis continues, I would like to express my heartfelt thanks to all our teams who have worked tirelessly and demonstrated time and again their responsiveness and resilience in fulfilling our public service mission. More than 50,000 Keolis employees have been on the front line to keep our networks running and we continue to work hand-in-hand with public transport authorities to implement the strict health and safety measures required to protect passengers and employees and, where necessary, to adjust our services.

How did the pandemic impact the Group’s performance in 2020?

Marie-Ange Debon: Like all other companies in the sector, our financial results were affected by the crisis. Group revenues amounted to €6.1 billion in 2020, down 7.5% on 2019. However, we were able to mitigate the financial impact of the pandemic by implementing rigorous action plans to preserve our balance sheet and contain our debt. In parallel, we enjoyed a surge of activity on the commercial front with the awards of several major contracts around the world, including the Adelaide commuter rail contract in Australia, new bus contracts in the United States and Denmark, and a second tram contract in China. In addition, we were awarded extensions on contracts to operate several major networks including in Boston, Washington DC, London and Stockholm. At the start of 2021, we won another important contract to operate Dubai’s metro and tram networks. These successes were echoed in France, where, despite a reduction in the number of tenders due to municipal elections, we successfully bid on renewals of all our urban transport contracts, including Blois, Châtellerault, Alès, Oyonnax and Tarbes-Lourdes. We also won several new contracts to operate intercity networks and rolled out an all-electric minibus route in the south-west of Paris for Ile-de-France Mobilités. Thanks to these efforts and our significant business wins, we look forward to returning to growth in 2021.
What are the Group’s growth ambitions given the current situation?

M-A.D.: Our immediate priority is to restore the operational and financial performance we’re accustomed to in order to support our growth. Our development ambitions remain unchanged with a focus on countries where we intend to grow our footprint, notably the United States, United Kingdom, Australia and several European countries. In addition, we are pursuing selective development in countries with high growth potential, such as India, China, Qatar and Senegal, where we already have robust references. Priority will go to projects where we can leverage our expertise to create the most value for public decision-makers and passengers like in Dubai, where we’ve been chosen to take over from another international operator to run the city’s tram and driverless metro networks. Meanwhile, in France we intend to carve out a major role in the Greater Paris region, where competition is growing following the liberalisation of the urban public transport market. Another focal point will be to harness our expertise and substantial experience in urban and suburban networks to drive passenger satisfaction using key performance indicators including service frequency, punctuality, comfort and digitalization of the passenger experience. We are also prioritising a more seamless experience thanks to intermodal connectivity with other mobility solutions, especially soft ones like walking and cycling.

What strategic directions have you set?

M-A.D.: In the immediate future, our priority is to restore confidence in using public transport to restore ridership. This is absolutely crucial. Looking further ahead, the group will be focusing on three main areas. The first is the energy transition where we intend to make shared mobility even more attractive by advising and accompanying our public transport authority partners in the conversion or replacement of diesel fleets with vehicles running on alternative fuels. Achieving this goal means overhauling operating procedures, installing charging and specialised maintenance stations, and training our drivers and teams. But it also means growing our expertise in niche areas such as battery recharging, where the technology has yet to reach maturity. Our second focus will be in making the passenger experience even more seamless. We’ll do this by harnessing digital technology and our innovation expertise to improve passenger information and increase our activities in sectors like real-time on-demand transport and contactless payment solutions. Thirdly, I want to see Keolis step up its contribution to economic development and social inclusion in all regions where we operate by creating jobs and developing new services.

In a single sentence, we wanted to capture the meaning of our day-to-day actions, namely to “Enhance everyday life in cities and communities by imagining and operating safe, smart and sustainable mobility solutions accessible to each and everyone.” This not only articulates our commitment to top priority issues like safety and the ecological transition, it also spotlights our innovation-driven approach and reflects our ambition to serve the common good and deliver tangible benefits for all our stakeholders who include public transport authorities, passengers, employees and the public. It’s above all a roadmap for guiding our decisions and actions and will be underpinned by KPIs to track and report on our progress.

On a more personal level, what are your feelings after your first few months at Keolis?

M-A.D.: I am proud to be at the helm of a company that today ranks as the world’s third largest public transport operator and which serves the common good by contributing to social inclusion, economic development and the energy transition. And I’m also proud to have taken charge of a group whose world-class workforce offers Keolis such solid foundations in France and internationally. My goal is to deliver on the company’s growth potential and ensure our services are aligned with the needs of each and everyone.

Keolis formulated its Corporate Purpose in 2020. Can you tell us more about it?

M-A.D.: Our Corporate Purpose clearly spells out what we do and where we stand. In a single sentence, we wanted to capture the meaning of our day-to-day actions, namely to “Enhance everyday life in cities and communities by imagining and operating safe, smart and sustainable mobility solutions accessible to each and everyone.” This not only articulates our commitment to top priority issues like safety and the ecological transition, it also spotlights our innovation-driven approach and reflects our ambition to serve the common good and deliver tangible benefits for all our stakeholders who include public transport authorities, passengers, employees and the public. It’s above all a roadmap for guiding our decisions and actions and will be underpinned by KPIs to track and report on our progress.

“Harness our expertise and substantial experience in urban and suburban networks to drive passenger satisfaction.”
Our contribution to the Sustainable Development Goals

The United Nations Global Compact is the world’s largest corporate social responsibility initiative, providing a framework for voluntary commitments, an international benchmark and a platform for action and dialogue. More than 13,000 companies, organisations, UN agencies and actors from the world of work and civil society across 170 countries are involved, including Keolis, which signed up in 2004.

In 2015, the United Nations (GC) adopted 17 Sustainable Development Goals (SDGs), which break down into 169 targets to transform our societies and make them more sustainable and inclusive by 2030. As a member, Keolis is committed to acting on the SDGs, and we stepped up our commitment in 2018 by joining the GC Advanced Club, the initiative’s highest level of reporting. Keolis is committed to contributing to the Sustainable Development Goals that are most relevant to our activities (grouped below by beneficiaries), and we set out this commitment when we announced our Corporate Purpose in 2021 (see pp 22–23).

Keolis’s environmental policy is fully aligned with the ecological transition. By operating shared mobility solutions, the Group helps deliver part of the response to the challenges of climate change. Our commitment is set out in our Corporate Purpose and is reflected in improvements to energy efficiency and greater use of low-carbon energies for the fleets operating on our networks. Keolis is also working to optimise water consumption, avoid pollution of any kind and responsibly manage chemicals and waste throughout their lifecycles.

Keolis safety, security and accessibility policies inform our everyday action to ensure everyone has access to safe, inclusive and sustainable transport. The Group is determined to grow the appeal of shared mobility in pursuit of a modal shift which achieves goals including promoting inclusion and improving air quality. Our mobility solutions support employment for the young and disadvantaged without other means of transport, as well as access to essential services for people with reduced mobility.

In 2020, Keolis further refined how we contribute to the SDGs by ranking the relevance of each of the 169 goals in the Global Compact Agenda 2030 in relation to our business activities and their strategic importance. This analysis helped us identify the 17 SDGs where we can make the most significant difference and calculated a percentage contribution to each one, including eight SDGs where Keolis’s contribution is 25% or greater.

At Keolis, we believe that our people are an essential element of our development and growth. For this reason, we strive to offer a work environment that meets their needs and expectations. Through the Group’s HR and safety policies, we work to protect the safety and health of our people, both physically and mentally, with top-up healthcare insurance and measures to fight discrimination, promote workplace wellbeing and achieve a healthy work-life balance. At the same time, our HR and Differentiation & Engagement policies are designed to create equal opportunities by offering everyone the chance to access a job and make progress within the company thanks to personalised support in skills development. The Group is also determined to grow constructive employee dialogue.

By offering a wide range of mobility solutions for our transport authority partners, Keolis contributes to the vitality and economic appeal of the communities where we operate, as well as to quality of life for local populations. The Group supports local employment growth – our subsidiaries are major employment drivers in the areas they serve, through recruiting for their own teams, hiring local subcontractors and purchasing with local businesses. Beyond Keolis’ mobility mission, our commitment to the communities we serve is also reflected in the many actions we take to support education, solidarity and culture, in partnership with local players.
A Board member since October 2020, Jérôme Tolot was appointed Chairman of the Keolis Supervisory Board on 15 January 2021.

Jérôme Tolot began his career with consulting firm McKinsey and Indosuez bank. He joined Lyonnaise des Eaux as a financial controller in 1992 and subsequently held various management positions within the group. After serving as Deputy CEO at Degrémont, CEO of GTM and Vinci and Chairman and CEO of SITA, he was appointed Deputy CEO and a member of the Management Board of Suez in 2002. Between 2005 and 2017 he was CEO of Engie Energy Services and then Deputy CEO and a member of the Executive Committee for the Engie group.

Keolis

I’m very impressed by Keolis’ international development over the past ten years and by the scope of its skills and expertise in multimodality, which stem from extensive experience in a wide variety of transport modes. Keolis is a company whose name commands a lot of respect in the sector. And with teams of professionals who love their jobs, it’s also a company with a “soul” – a key success factor.

Overview of 2020

Worldwide, Keolis was able to cope with the unprecedented health crisis thanks to the professionalism of its teams. Throughout 2020, they worked extremely hard to liaise and negotiate with public transport authorities (PTAs) about the operational impact of the crisis and its financial consequences. They also worked tirelessly to adapt timetables and the frequency of transport services, to constantly changing mobility needs. At the same time, the company pursued its commercial development under challenging circumstances, with notable successes both in France and worldwide. By liaising closely with PTAs, the Group also made progress in 2020 in the resolution of certain challenges including agreeing on the form of the future rail contract in Wales and moving forward in discussions about our operations in Germany. Unsurprisingly, Covid-19 had a significant impact on Keolis’ 2020 financial performance.

Strategic focuses

The health crisis provides us with a renewed sense of urgency in implementing the strategy set by the Supervisory Board, CEO and Executive Committee. In a particularly competitive world, we are stepping up efforts to stand out from the competition by surpassing stakeholder expectations in such critical areas as environmental protection, addressing passengers’ social vulnerabilities and delivering ever more innovative mobility solutions. I believe that our Corporate Purpose – formulated recently after wide consultation – aptly reflects the approach we intend to take, namely to “Enhance everyday life in cities and communities by imagining and operatating safe, smart and sustainable mobility solutions accessible to each and everyone”. The Supervisory Board also supports the company’s strategy of focusing more specifically on geographies like France, the United States, Australia, Belgium, Sweden and the United Kingdom, while remaining open to opportunities in other countries where our expertise would make us a suitable candidate to operate local networks. Finally, to be able to implement our strategy successfully, we are upskilling our teams in fields like harnessing digital technology to improve operational performance and passenger experience.

Challenges ahead

Keolis will continue to benefit from the support of two committed shareholders in tune with the company’s long-term objectives. The Supervisory Board and its committees are 100% behind Keolis and ready to review the company’s strategy, challenges and opportunities as needed, in close liaison with the CEO. The first challenge involves finding solutions to the financial shortfalls created by the Covid-19 crisis. The second consists in further growing our business by renewing key contracts, bolstering our position in the Greater Paris region and pursuing our international development. We also need to meet the sizeable innovation challenges that create value for both passengers and public transport authorities and include integrating more digital technology and preparing for the energy transition. Intrinsically linked with all these challenges is the key question of human resources, where Keolis is strengthening its workforce, both in France and worldwide, by growing the skillsets of existing staff and seeking out new talent.
Executive Committee

Composed of nine members, the Executive Committee is the key governing body responsible for the strategic direction and overall management of Keolis, working in close collaboration with the Supervisory Board.

Marie-Ange Debon, Chairwoman and Group Chief Executive Officer

Arnaud Van Troeyen, Group Deputy Director International

Pierre Cassot, Group Director Industrial Division

Annelise Avrèt, Group Director Marketing, Innovation and New Mobilities

Christelle Villadary, Group Chief Financial Officer

Frédéric Baverez, Chief Executive Officer France and Chairman of EFFIA

Clément Michel, Group Director Human Resources and Transformation

Frédéric Raoult, Group Director Communications

Bernard Tapary, Chief Executive Officer International

Frédéric Saverey, Chief Executive Officer International

Marie-Ange Debon, Chairwoman and Group Chief Executive Officer

Arnaud Van Troeyen, Group Deputy Director International

Pierre Cassot, Group Director Industrial Division

Annelise Avrèt, Group Director Marketing, Innovation and New Mobilities

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Annelise Avrèt, Group Director Marketing, Innovation and New Mobilities

Christelle Villadary, Group Chief Financial Officer

Frédéric Baverez, Chief Executive Officer France and Chairman of EFFIA

Clément Michel, Group Director Human Resources and Transformation

Frédéric Raoult, Group Director Communications

Bernard Tapary, Chief Executive Officer International

Frédéric Saverey, Chief Executive Officer International
In the 16 countries where we operate, we design and deploy shared mobility solutions custom-made for cities and communities. Our global leadership is built on extensive expertise in a wide range of high-capacity modes of transport, coupled with the ability to integrate them seamlessly into multimodal transport offers to meet the needs of local authorities and their citizens.

**Leader in urban transport in France**

**No.1 tram operator in the world**
- with 1,034 km of track and 27 networks worldwide

**Global leader in automated metros**
- with 452 km of track and 10 networks worldwide

**Leading integrated parking operator in France**
- (car parks and on-street)

**More than 23,200 buses and coaches in service worldwide**

**15 regional rail networks**
- almost 5,000 km of track

**Real-time on-demand transport services in Australia, United States and France**

**More than 200,000 passengers carried on autonomous electric vehicles on 40 services across the world**

**Leading provider of transport for people with reduced mobility in France**

**+89% electric buses since 2019**

**31,000 bicycles in France and the Netherlands**

**No.1 medical transport operator in France**

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Our 2020–21 references

A global leader in shared mobility, we operate and maintain urban, suburban and intercity networks for more than 300 public transport authorities. Our worldwide operations feature a dozen different mobility modes.

**TRAMS**

**World Leader**

1,034 km of track in operation or under construction including:

- Melbourne, the world’s largest tram network: 260 km
- Greater Manchester, the UK’s largest light rail network: 96 km
- Aarhus, Denmark’s first light rail network

**27 networks worldwide**

Networks in service

- **Australia**: Gold Coast, Melbourne and Newcastle
- **Canada**: Waterloo (Ontario)
- **China**: Jiaxing (start of operations by Keolis in July 2021), Shanghai
- **Denmark**: Aarhus
- **France**: Besançon, Bordeaux, Caen, Dijon, Le Mans (TA*), Lille, Lyon, Nancy, Orléans, T9 and T11 in Greater Paris, Strasbourg (TA*), Tours
- **Norway**: Bergen
- **United Arab Emirates**: Dubai (start of operations by Keolis in September 2021)

Networks under construction

- **Ivory Coast**: Abidjan

**BUSES & COACHES**

23,207 vehicles worldwide

4,054 run on alternative fuels

- **613 biodiesel**
- **453 hybrids**
- **52 LPG**
- **16 hydrogen**

23,207 vehicles worldwide

- **Buses & Coaches**
- **2020 Integrated report**

**URBAN & SUBURBAN**

Networks in service

- **Australia**: Adelaide, Brisbane, Geraldton, Kalgoorlie, Newcastle, Perth
- **Belgium**: Antwerp, Bruges, Brussels, Charleroi, Ghent
- **Canada**: L’Assomption and Terrebonne (Quebec)
- **Denmark**: Aalborg, Copenhagen, Odense
- **Netherlands**: Almere, Provinces of Gelderland, Overijssel and Utrecht
- **Norway**: Bergen
- **Sweden**: Dalarna, Gothenburg, Jonkoping, Karlstad, Orebro, Stockholm
- **United Arab Emirates**: Dubai (start of operations by Keolis in September 2021)

Networks under construction

- **France**: Charles-de-Gaulles Airport (CDG) Express
- **Ivory Coast**: Abidjan
- **Netherlands**: Province of Overijssel, Twente
- **United Kingdom**: Govia Thameslink Railway, Southeastern
- **United States**: Massachusetts Bay Transportation Authority Commuter Rail, Virginia Railway Express

**TRAINS**

Almost 1,000 km of track

15 regional rail networks

Networks in service

- **Australia**: Adelaide Commuter Rail
- **China**: Shanghai Pudong International Airport and Shanghai Pudong automated metro line
- **France**: Lille, Lyon and Rennes
- **India**: Hyderabad
- **Qatar**: Doha
- **United Kingdom**: London (DLR)
- **United Arab Emirates**: Dubai (start of operations by Keolis in September 2021)

Networks under construction

- **France**: Allier, Aisne, Aveyron, Charente-Maritime, Gard, Hérault, Loire Atlantique, Metz (TA*), Moselle, Pau (TA*), Rennes, Tours
- **United Kingdom**: Almere
- **United States**: Las Vegas (Nevada)

**AIRPORT SHUTTLES**

- **Canada**: Montreal, Quebec
- **Denmark**: Aarhus
- **France**: Bordeaux, Marseille, Montpellier
- **United States**: Fort Lauderdale (Florida)

Our worldwide operations feature a dozen different mobility modes.

**METROS**

452 km of track in operation or under construction

Pioneer and global leader in automated metros – 330 km of track

10 metro networks worldwide

Networks in service

- **China**: Shanghai Pudong International Airport and Shanghai Pudong automated metro line
- **France**: Lille, Lyon and Rennes
- **India**: Hyderabad
- **Qatar**: Doha
- **United Kingdom**: London (DLR)
- **United Arab Emirates**: Dubai (start of operations by Keolis in September 2021)

Networks under construction

- **Ivory Coast**: Abidjan

**PIONEER AND GLOBAL LEADER IN AUTOMATED METROS – 330 KM OF TRACK**

10 metro networks worldwide

Networks in service

- **China**: Shanghai Pudong International Airport and Shanghai Pudong automated metro line
- **France**: Lille, Lyon and Rennes
- **India**: Hyderabad
- **Qatar**: Doha
- **United Kingdom**: London (DLR)
- **United Arab Emirates**: Dubai (start of operations by Keolis in September 2021)

Networks under construction

- **Ivory Coast**: Abidjan

* TA: Technical Assistance
AUTONOMOUS ELECTRIC VEHICLES
- More than 110,000 km clocked up
- More than 1,000 hours of operation
- More than 200 passes
- Services introduced around the world since 2016

NEW SERVICES LAUNCHED IN 2020
- Australia: Sydney
- Monaco
- Sweden: Stockholm, Gothenburg

AND ALSO
- Australia: Flinders University, Adelaide, Newcastle, and Renmark
- France: Lille, Lyon Confluence

ON-DEMAND TRANSPORT
- Real-time on-demand transport
  - Australia: Adelaide, Newcastle, Sydney, Mount Barker and the Barossa Valley (near Adelaide)
  - France: Aix-en-Provence, Anglet, Bordeaux, Lyon, Nancy, Orleans, Strasbourg, Tours
  - United States: Orange County (South California)

DIGITALLY-ENABLED ON-DEMAND TRANSPORT
- France: Châlons-en-Champagne, Lille, Roissy, Rouen

AND ALSO
- France: Arras, Bassin de Pompey, Chambéry, Dijon, Laval

TRANSPORT FOR PEOPLE WITH REDUCED MOBILITY

LEADER IN FRANCE
- France: Bayonne, Bordeaux, Caen, Cherbourg, Dijon, Île-de-France Paris region (PAM 75, PAM 78, PAM 54), Lille, Lyon, Orleans, Quimper, Rennes, Tours
- Sweden: Stockholm
- United States: Greensboro (North Carolina), Lancaster and Van Nuys (California)

MEDICAL TRANSPORT
- Largest nationwide ambulance provider
- 2,400 medical vehicles
- 4,500 healthcare professionals
- 145 Jussieu Secours ambulance centres

CAR-SHARING
- France: Arras, Bordeaux, Caen, Châlons-en-Champagne, Lille, Metz, Orleans, Rennes

BICYCLES
- 31,000 bicycles in France and the Netherlands including self-service, long-term rental, electrically-assisted
- France: Agen, Amiens, Arras, Bayonne, Besançon, Blois, Bordeaux, Bourg-en-Bresse, Bourgoin-Jallieu, Caen, Châlons-en-Champagne, Chaumont, Dijon, Grenoble, Laiv, Le Mans, Lille, Metz, Montargis, Montluçon, Moulins, Nevers, Orléans, Pau, Quimper, Rennes, Roam, Sarrebourg, Tours, Versailles
- Netherlands: Almere, Utrecht, Veluwe (Province of Gelderland)

CAR-POOLING
- France: Alès, Besançon, Bordeaux, Bourg-en-Bresse, Caen, Châlons-en-Champagne, Dijon, Le Mans, Lille, Rennes, Sarrebourg
- CMABULLE (app that pairs families for lift-sharing for the school run and out-of-school activities)

PARKING
- No.1 for combined car park and on-street parking contracts in France
- No.1 for train station car parks in France
- You PARKING operator in Belgium
- 600 parking spaces operated in 246 cities in France and Belgium
- 264,000 spaces, including
- 58,000 on-street
- 137 Park & Ride car parks

SEA AND RIVER SHUTTLES
- Australia: Newcastle
- France: Bayonne, Bordeaux

TOWING
- No.1 for combined car park and on-street parking contracts in France
- No.1 for train station car parks in France
- You PARKING operator in Belgium
- 600 parking spaces operated in 246 cities in France and Belgium
- 264,000 spaces, including
- 58,000 on-street
- 137 Park & Ride car parks