TOGETHER AGAINST THE VIRUS

SEPTEMBER 2020  #WeAreKeolis
The COVID-19 pandemic confronted countries around the world and their shared mobility systems with an entirely unprecedented set of challenges, due to its sheer scale, suddenness and socio-economic impacts.

Working closely with the public transport authorities and the communities and regions we serve, our teams remain fully mobilised to continue performing their public service role while ensuring the highest levels of health and safety.

Here we take a look back at the tremendous contribution made by all subsidiaries and corporate functions throughout these unprecedented times.
What was your strategy for coming out of lockdown?

F.R.: It’s always easier to shut down a network than to restart it. So very early on, we planned how we would overcome the various issues, such as staff availability and how to keep our people safe, the availability of technical equipment, specific disinfection measures, the restrictions public authorities might impose on passengers, and the timeframes needed for rebuilding transport services with these restrictions in place.

JACQUES DAMAS
Executive Director, Security, Safety, Environment and CSR

How do you assess Keolis’ management of the crisis?

Sharing best practices across the entire organisation helped us act more effectively on the ground in all key areas of managing the crisis — from implementing safety measures on our networks to reorganising operations, managing people working from home and communicating with our teams, passengers and PTA partners.

Today, our priority is clear: resume operations as quickly and effectively as we can, in a spirit of trust and dialogue with PTA partners. Several authorities in different parts of the world have thanked us for the expertise we’ve provided. The unfolding commitment and flexibility shown by our teams has enabled us to maintain the safe, world-class public service they expect and deserve.

NANCY, FRANCE
STANDING WITH HEALTHCARE WORKERS

“As soon as France went into lockdown, we worked with the Greater Nancy metropolitan council to roll out Mobissant, a free on-demand transport service for hospital staff who don’t have a bus or tram stop near their homes, or whose shifts mean they can’t commute by public transport,” says Xavier Lemarié, Managing Director of Keolis Grand Nancy. “On average, 145 people benefited from this initiative, with almost 200 people using it on some days. And from 30 March 2020, we also extended it to other key sectors.” In June, the subsidiary made a bus available for a free coronavirus screening campaign.

LANCASTER, CALIFORNIA, USA
FOOD PARCELS DELIVERED

“In Lancaster, near Los Angeles, our bus drivers turned their skills to home deliveries under a partnership with Grace Chapel,” says Jason Tuttle, interim managing director of Keolis Lancaster. “They delivered 400 food parcels a day to people who couldn’t leave home to go shopping.”

DIJON, FRANCE
METICULOUS DISINFECTION

“Keolis Dijon Mobilités has put in place a comprehensive daily disinfection plan across the Divia Mobilités network. As well as the safety of rolling stock at depots, we’re also disinfecting buses and trams at night using a procedure called fogging,” says Thomas Fontaine, the subsidiary’s managing director. “Fogging creates a fine mist of virucidal disinfectant, which is a really effective way of deep cleaning seats, windows, inside walls and the areas you can’t reach manually. Rolling stock is also disinfected at night using ozone, along with the common areas in the Maintenance and Operations Centre, such as coffee rooms, cloakrooms, shared offices and the canteen. The subsidiary has also mobilised to support healthcare workers by adjusting its passenger services accordingly and setting up a dedicated service to deliver meals.”

What impacts might this crisis have going forward?

B.T.: In the near term, our absolute priority is to rebuild passenger trust so they come back to public transport, thereby avoiding a massive return to private car use. To do this, we need to reassure them by making cleaning operations more visible and adopting even more effective solutions for disinfecting across our networks, such as UV radiation and ozone machines. We must also encourage passengers to respect social distancing and other measures by putting behavioural nudges to work and using high-profile and effective ways of communicating. Other steps we’ve taken include switching to digital ticketing to limit physical contact, gathering data on real-time vehicle occupancy so we can keep passengers informed about likely numbers on their planned journeys and also encouraging companies and universities to introduce staggered working and teaching patterns to better spread out passenger flows over the days and weeks.

B.T.: We did all this in a partnership approach. For each of these issues, we’ve been working closely with PTAs to meet their requirements by adapting to their specific contexts and the constraints they face. By way of example, we’ve renegotiated some of our contracts in order to minimise the financial impacts for PTAs.

QUIMPER, FRANCE
SAFER MOBILITY FOR SENIOR CITIZENS

“We’ve made it easier and safer for the over 75s to travel,” says Alain Farges, Managing Director of Keolis Quimper. “Working with the Quimper Bretagne Occidentale urban community, we set up a free dedicated on-demand transport service. Senior citizens simply book a vehicle, which picks them up directly at their front door so they can do their essential shopping, then takes them back home.”

METICULOUS DISINFECTION

To protect the health of passengers and staff, Keolis Dijon Mobilités has put in place a comprehensive daily disinfection plan across the Divia Mobilités network. As well as the safety of rolling stock at depots, we’re also disinfecting buses and trams at night using a procedure called fogging,” says Thomas Fontaine, the subsidiary’s managing director. “Fogging creates a fine mist of virucidal disinfectant, which is a really effective way of deep cleaning seats, windows, inside walls and the areas you can’t reach manually. Rolling stock is also disinfected at night using ozone, along with the common areas in the Maintenance and Operations Centre, such as coffee rooms, cloakrooms, shared offices and the canteen. The subsidiary has also mobilised to support healthcare workers by adjusting its passenger services accordingly and setting up a dedicated service to deliver meals.”

KEOLIS’ MANAGEMENT OF THE HEALTH CRISIS

B.T.: Due to the ensuing recession and drop in revenues, the resources available to public authorities will be impacted for years to come. At the same time, there’ll be extra demands on their spending as they help businesses and households worst affected by the economic crisis. More than ever, operators will need to offer the best transport services at the best possible price by constantly seeking ways to drive economic efficiency. They’ll also need to adapt to social changes as a lot more people will work from home or live further away from city centres, as well as potential changes in passenger behaviour, like a new preference for active modes of transport.

That’s why we’re tracking these trends through Keoscopie — our international observatory of mobility trends — so we can better understand the medium-term impacts the crisis could have on lifestyles and mobility.

JACQUES DAMAS
Executive Director, Security, Safety, Environment and CSR

Looking further ahead, we are convinced the COVID-19 crisis will accelerate awareness of the need to further develop shared mobility to combat climate change. According to the International Energy Agency, greenhouse emissions fell 8% during the two months of lockdown, mostly due to fewer cars on the road, while public transport means ensuring public transport services at the best possible price by constantly seeking ways to drive economic efficiency. They’ll also need to adapt to social changes as a lot more people will work from home or live further away from city centres, as well as potential changes in passenger behaviour, like a new preference for active modes of transport.

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Turning to the medium-term impacts the crisis could have on lifestyles and mobility.

We’ll continue to focus our efforts on service quality and safety. Rebuilding passenger and employee trust in public transport means ensuring buses, trams and trains are always reliable, on time and clean. Talking to people directly on the ground is the best way to understand the evolving expectations of passengers, who may want to use different modes of transport, and our staff as they go about their jobs. It’s the best way to understand the priorities of our PTAs and the constraints they face in the new socio-economic paradigm. It’s also the best way to stand out and build our future.
Melbourne, Australia

200 New Staff to Meet the Disinfection Challenge

“To step up cleaning and disinfection on Yarra Trams — the world’s largest tram network — we hired almost 200 people left jobless by the COVID-19 crisis,” says Julien Dehornoy, Managing Director of Yarra Trams. “This exceptional measure was made possible thanks to the Working for Victoria Fund, an initiative launched by the State of Victoria, which enabled 300 new jobs to be created to ensure enhanced cleaning and safety on the network as well as provide work for people in the region.”

North Rhine-Westphalia, Germany

Keeping Our Onboard Staff Safe

As requested by the State of North Rhine-Westphalia, train services in the region returned to 98% of normal timetable from 27 April. “To ensure our staff could return to work as safely as possible, our subsidiary and the transport authority put in place all the necessary measures,” says Anne Mathieu, CEO of Keolis Deutschland. “These included mandatory wearing of masks by passengers and inspectors, washable gloves for onboard staff and disinfectant for drivers so they can clean the cab areas where they work.”

Lyon, France

Innovative Solutions for Maximum Health Protection

“To ensure the highest levels of safety for passengers as the public transport network in Lyon came out of lockdown, we worked with public transport authority SYTRAL to install automatic contactless hand sanitiser dispensers, which allow effective, natural, eco-friendly hand hygiene in just seven seconds,” says Pascal Jacquesson, CEO of Keolis Lyon. “We deployed a new UV air disinfection robot and a dry steam cleaner, which can deep clean a bus in 15 minutes. And over 400 staff worked every day to distribute 100,000 masks a week and remind passengers to abide by social distancing and other precautionary measures. Their efforts were commended by SYTRAL and passengers.”

Shanghai, China

Healthy Air on Every Train

“In China, the first country affected by COVID-19, our teams operating the tram network in Songjiang district (31 km, 46 stations) implemented extra health and safety measures, such as temperature checks for passengers at the busiest stations,” says Bertrand Laude, Managing Director of Shanghai Keolis. “UV lamps have been installed in the tram air conditioning and ventilation systems to sterilise the air as it passes through. As part of the daily disinfection of trains at the depot, the entire air conditioning system and filters are also deep cleaned.”
MORLAIX, FRANCE
CONTACTLESS PAYMENT TO REDUCE RISK
To resume services as safely as possible from the first day of lockdown, the Linéotim bus network in Morlaix — comprising four urban and six suburban routes, plus two on-demand services — adopted a range of preventive measures to limit the virus’ spread and restore passenger confidence. “In just three days, we rolled out the TixiPass contactless payment solution, which lets passengers buy and validate their tickets using their smartphone and a QR Code,” says David Kernevez, Managing Director of Keolis Morlaix.

HYDERABAD, INDIA
MOBILISATION FOR CHILDREN WITH HIV/AIDS
Keolis Hyderabad provided 120 litres of sanitiser solution to Agape, an NGO caring for children with HIV/AIDS. Because their immune systems are weak, they have a much higher risk of contracting COVID-19. “We managed to source the sanitiser. Our teams then loaded it on to the only metro train allowed to operate so it could be delivered to a station where Agape could pick it up,” says Edward Thomas, Managing Director, Keolis Hyderabad. “Many of our colleagues here at the subsidiary took part in this action, from purchasing the bottled sanitiser to loading and unloading.”

BORDEAUX, FRANCE
MOBILE CLEANING PATROLS TO REASSURE PASSENGERS
“To ensure the highest levels of safety and reassure passengers, the Keolis Bordeaux Métropole network set up cleaning patrols, which continually move around the network to disinfect the most critical equipment on buses and trains, such as grab rails and bars, handles and push buttons,” says Eric Moinsier, Managing Director of Keolis Bordeaux Métropole. Working in teams of six and recognisable by their blue uniform, they operate across the network from Monday to Saturday, 10 am to 4 pm. The subsidiary has also set up a free on-demand transport service for staff at hospitals and retirement homes, with 24 specially equipped vehicles. The service carried 6,000 people during its two months of operation, from 25 March to 24 May 2020.

RENNES, FRANCE
8,000 STICKERS INSTALLED IN A WEEKEND
“To comply with social distancing rules, we increased the number of vehicles operating from 11 May (end of lockdown in France), with 100% of the normal level on our metro lines, with a 90-second gap between trains, and 80% on bus routes,” says Laurent Senigou, Managing Director of Keolis Rennes. “The weekend before, 150 staff put up signage in stations, bus shelters, metro trainsets and buses to remind passengers of the precautionary measures they need to take during their journeys. Over 8,000 stickers were placed across the entire network.”

BOSTON, MASSACHUSETTS, USA
A SAFE SERVICE FOR FRONTLINE PASSENGERS
“To balance the need for safety and still provide an essential transport service for everyone who needs to commute to key jobs such as doctors, nurses, food retailers and other frontline workers, we’ve adapted our train timetables and stepped up cleaning across the network,” says David Scorey, CEO, Keolis Commuter Services. “Each train is disinfected at least daily or even during their passenger service schedule by extra cleaning teams working at key terminals as well as maintenance locations.” At the same time, the subsidiary’s teams have been carrying out maintenance and improvement work on infrastructure and maintaining full rolling stock fleet availability to prepare for the resumption of normal services on this commuter rail network featuring 14 lines and 640 kilometres (398 mi) of track. On 15 June 2020, Keolis’ operating contract for this network was renewed for a further four years.
NOTTINGHAM, UNITED KINGDOM
CLAPPING FOR FRONTLINE WORKERS
“Every day during the coronavirus crisis, trams stopped for a few minutes at 8 pm to allow drivers and passengers to clap, cheer and make noise for healthcare staff and other frontline workers in the fight against COVID-19,” says Paul Robinson, Managing Director of Nottingham Trams. Other networks also showed their solidarity with essential workers. Bus and tram drivers in Besançon, for example, sounded their horns every day in a concert of support in front of the hospital to thank medical staff for their brave commitment.

TOURS, FRANCE
KEEPING IN TOUCH
During the crisis, Keolis Tours has kept in touch with its 80,000 pass-holders, regularly informing them about the measures in place on the network and reminding them that staff are available to help them on their essential journeys.

ISÈRE, FRANCE
SOLIDARITY WITH THE FRONTLINE
From free trips to reimbursement or deferral of travel pass payments, Keolis Porte de l’Isère — which serves the towns of Bourgoin-Jallieu, Villefontaine and L’Isle-d’Abeau — has been providing support for everyone who needs to commute to jobs where they deliver vital services, such as healthcare, logistics, food retail and public services.

KEOLIS SANTÉ, FRANCE
ON THE FRONTLINE WITH PATIENTS
In partnership with the Vendée departmental council, Keolis Santé launched an innovative new concept called the Mobile Teleconsultation Unit (UMT). The UMT unit with its specially adapted ambulance, connected hardware and nurse/ambulance crew has been made available to the council’s medical staff to enable people to stay at home.
“This initiative has helped reduce demand on hospitals while keeping vulnerable people safe from COVID-19,” says Roland de Barbentane, President of Keolis Santé. “All across France, our medical transport teams have been playing a key role in carrying patients. As well as responding to the needs of hospital emergency services on a 24/7 basis, they’ve also been called on to support ad hoc transfers by plane or high-speed train by bridging the first and last mile gaps.”
More ways, more life means joining forces with you, our stakeholders, to roll out innovative personalised shared mobility solutions. It means working with you, our public transport authorities partners, to make our communities smarter, more connected, more sustainable and more attractive. It means devising appealing, viable alternatives to single passenger car journeys and enhancing use of public space to build better lives together.
A major player in shared mobility around the world, Keolis designs, operates and maintains transport services tailored to each city or region, from urban centres and outlying suburbs to intercity links. Our expertise spans more than 10 different mobility modes, from high-capacity services to the most agile solutions.
In 2019, Keolis pursued its double-digit growth, further improving its operating profitability and confirming its position as a world-class player in shared mobility.

**TOTAL NUMBER OF EMPLOYEES**
68,500
WITH 45% OUTSIDE OF FRANCE

**PROPORTION OF WOMEN IN WORKFORCE**
21.4%

**TOTAL PAYROLL INVESTED IN TRAINING**
3.94%
OVER THREE TIMES THE STATUTORY REQUIREMENT IN FRANCE

**REVENUE**
2019
€6,579 BILLION
+10.9%

2018
€5,934 BILLION

**RECURRING EBITDA**
2019
€418 MILLION
+6.6%

2018
€392 MILLION

**NET RECURRING INCOME (GROUP SHARE) ON A LIKE-FOR-LIKE BASIS**
2019
€84.3 MILLION
+7.3%

2018
€78.6 MILLION

**BREAKDOWN OF REVENUE IN FRANCE**

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**BREAKDOWN OF INTERNATIONAL REVENUE**

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<th>Region</th>
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<tr>
<td>North America</td>
<td>22%</td>
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<td>United Kingdom</td>
<td>19%</td>
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<td>Australia – New Zealand</td>
<td>18%</td>
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<td>Continental Europe</td>
<td>41%</td>
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<td>International</td>
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<td>Others in France (Effia, Kisio, new mobility solutions)</td>
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We are present in 15 countries
Keolis’ business model for shared, sustainable and inclusive mobility built with and for our stakeholders

Every day, we are working to ensure a more sustainable shared mobility meets the needs of each and every citizen and contributes to the dynamism of our cities and regions.

We see shared mobility as a driver of progress for all and a solution to the major challenges of today and tomorrow, including the green transition, new forms of mobility, the digital transformation and economic efficiency.

The shared mobility sector is expanding as the world’s population grows and new markets open.
In today’s fast-changing world, the mobility landscape needs to be completely reshaped by inventing new solutions to meet the major challenges ahead. This is the daily focus of our 68,500 employees as they seek to develop innovative solutions closely aligned with the needs of communities everywhere.

- TOWARDS GREENER ENERGIES (12)
- NEW FORMS OF MOBILITY (16)
- THE DIGITAL TRANSFORMATION (20)
- ECONOMIC AND OPERATIONAL EFFICIENCY (24)
**TOWARDS GREENER ENERGIES**

**NEW MOBILITY OPTIONS TO TACKLE CLIMATE EMERGENCY**

By directly helping reduce individual car use, shared mobility is a key component in tackling global warming and protecting public health. But to play this role effectively and make a more positive contribution, we need to shift to a new energy model. Around the world, regulations are tightening, and people’s expectations are growing. In France, as of 2025, all major cities are required to invest exclusively in low-carbon vehicles when they renew their bus fleets. In Europe, as part of the European Commission’s “European Green Deal” aiming to make Europe carbon neutral by 2050, greenhouse gas emissions must be at least halved by 2030,

newly thanks to the growing number of zero-emission vehicles in urban bus fleets. In the United States, California is aiming to operate only zero-emission buses by 2040, with the priority given to electric bus fleets.

At the same time, Singapore, Berlin, Brussels, London, Oslo, Mexico, Bogota and San Francisco have introduced aggressive policies to curb individual car use. Deterrents include tolls, bans in certain areas and fewer parking spaces. Some cities like Stockholm, Bergen, Tours, Amiens, Greensboro, Pau and Los Angeles are replacing fossil-fuelled buses with electric, natural gas, bio-natural gas and hydrogen-powered vehicles, while others are prioritising specific energies, including Lyon, where 75% of journeys are already made on electric vehicles.

Transport authorities, this transition creates a whole host of challenges: “clean” vehicles cost more, the technologies involved – and battery performance – are constantly evolving, infrastructure needs to be adapted and operating and maintenance systems overhauled. As a result, investment decisions are highly complex.

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**COMPARED WITH 1990 LEVELS.**

**HIGHER COMPLEXITY.**

**AND MAINTENANCE SYSTEMS OVERHAULED.**

**AS A RESULT, INVESTMENT DECISIONS ARE CONSTANTLY EVOLVING.**

**INFRASTRUCTURE NEEDS TO BE ADAPTED AND OPERATING AND MAINTENANCE SYSTEMS OVERHAULED.**

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**Context**

**NEW MOBILITY OPTIONS TO TACKLE CLIMATE EMERGENCY**

**1.4 BILLION CARS ON THE ROAD WORLDWIDE (STATISTICA 2015).**

**1,000**

**FOR EVERY 1,000 ELECTRIC BUSES ON THE ROAD, GLOBAL DAILY OIL DEMAND DROPS BY 600 BARRELS (BLOOMBERG NEW ENERGY FINANCE).**

**UP 1.1°C**

**IN 2019, THE AVERAGE GLOBAL TEMPERATURE WAS 1.1°C WARMER THAN ESTIMATED PREINDUSTRIAL LEVELS (WORLD METEOROLOGICAL ORGANIZATION).**

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**Keolis’ response**

**GREENER MOBILITY**

Committed to embracing more eco-friendly mobility, we’re supporting public transport authorities to develop and deploy sustainable transport solutions that are better for the environment and their citizens.

As we continue to roll out attractive and high-performance shared mobility solutions, we contribute to reducing the use of private cars. But the climate emergency means that we must go further. In addition to electrified trains, metros and trams (so called “heavy transport” mode), with their demonstrated low-carbon footprints in major cities worldwide, we’re helping public transport authorities to deploy clean bus fleets that operate on alternative fuels like electricity, natural gas, bio-natural gas and hydrogen, and which are suitable for vehicles of all sizes – standard and articulated buses, bus rapid transit (BRT) coaches, trolleybuses, minibuses and shuttles.

**LEADING THE WAY WITH ELECTRIC AND HYDROGEN BUSES**

Our expertise in electro-mobility was further strengthened in 2019. We began operation of France’s first e-BRT services: three in Amiens and one in the Bayonne-Anglet-Biarritz area. We also launched trials with all-electric coaches on an intercity route between Valence and Aubenas in the Auvergne-Rhône-Alpes region. In Aix-en-Provence, Tours, Caen and Ghent (Belgium), we rolled out city centre electric shuttles, and in the city of Pau we introduced the world’s first fully hydrogen-powered BRT system, promising minimal impact on the environment.

In Norway we won a contract to operate 140 mostly electric buses in the city of Bergen (see p.14). In the United States, we began operating the first electric bus service in North Carolina (Greensboro) in January 2019, and a few months later we were awarded a contract to operate a new bus service in Washoe County (Nevada) as part of the transport authority’s plans to eventually convert to an all-electric fleet. In Quebec, we launched Canada’s largest zero-emission school bus fleet to date.

**BENEFITS OF GAS FUELS**

Keolis has been supporting transport authorities for many years in the development and operation of natural gas and bio-natural gas-powered buses. Lille, for example, has been running its entire bus fleet on gas since 2013, while Stockholm boasts a zero-carbon bus fleet, and 170 of the 330 buses we operate for the city use biogas produced at a local biomethane plant. In 2019, cities in France have also switched to natural gas including Besançon, which launched a biogas powered bus-tram service in 2019, and Sophia Antipolis, which chose us in January 2020 to operate its gas-powered buses. So, what are the benefits of gas? Less expensive than electric buses, gas-powered buses are very virtuous in terms of particle emissions.

**CONSULTING AND SHARING EXPERTISE**

Our added value lies in the custom-tailored support we offer public transport authorities (PTAs) for every aspect of their green bus strategy – from understanding the local challenges involved in supporting technology choices, modelling and estimation of the total cost of ownership, bids, trials, training, rollout and maintenance. To offer as many local authorities as possible the benefit of our expertise, our Centre of Excellence for Buses and New Energies brings together our extensive know-how in alternative transport fuels. In November 2019, our experts embarked on the “Keolis New Energy Tour” to share our experience and insights with elected officials and technical teams at local authorities around France to help them prepare their strategy. We also provided test vehicles to give them a close-up look at the options available.

As well as supporting PTAs as they convert to alternative solutions, we help them optimise fuel consumption through training on eco-driving and regenerative braking.

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**Today’s Major Challenges**

2019 Annual Report

Keolis
TOWARDS GREENER ENERGIES

Keolis’ response

ALL ABOARD E-BRT IN AMIENS AND THE FRENCH BASQUE COUNTRY!

We rolled out France’s first-ever all-electric bus rapid transit (BRT) services for the city of Amiens and the Pays Basque Adour public transport authority in 2019. Deployed within six months of each other, both services use 150-seat zero-emissions buses. Offering extended timetables and mostly running on dedicated lanes, the BRT services bring a host of passenger benefits, including a significantly smoother, quieter ride with less vibration, large windows for maximum light and USB sockets. In addition, the dual charging system means vehicles can be quickly recharged at the terminal (in 5 minutes) as well as at the depot at night (3 to 4 hours).

ELECTRIC BUSES SHIFT UP A GEAR

In 2019, we rolled out several new projects and were awarded several contracts, bolstering our leadership in electric mobility.

In Norway, we were awarded a new contract in June 2019 to operate and maintain around 140 mainly electric buses in the city of Bergen, where we already operate the tram network. The nine-and-a-half year contract will come into effect in December 2020. The buses will contribute to improving quality of life for the nearly 300,000 inhabitants of Norway’s second largest city. To meet the PTA’s needs, we have already purchased 102 electric buses and 10 articulated electric trolleybuses and are preparing throughout 2020 for the launch of commercial service. Preparations include the purchase of other electric buses to complete the fleet, recharging infrastructure, as well as driver and maintenance staff recruitment and training.

In the United States, we began operating 14 e-buses as part of a 43-strong bus fleet for the city of Greensboro in North Carolina.

In Nevada, the Washoe Regional Transportation Commission chose us to operate the Reno regional bus service, which currently has 21 electric buses. These two contracts come on top of the existing one with Los Angeles County (California) to support Foothill Transit as it plans to convert its entire bus fleet to an entirely electrically powered fleet by 2030.

TODAY’S MAJOR CHALLENGES
Keolis’ response

NEW FORMS OF MOBILITY

Context

50% Between 2016 and 2018, the percentage of French people who used their car every day fell from 59% to 50% (Observatory of emerging mobilities).

38% of people surveyed by Keoscopie International use new mobility solutions at least once a month and 65% say they may use them in the future.

30% of people in Europe get on their bikes for their daily travel needs and 31% use carpooling services (Observatory of emerging mobilities).

MORE MOBILITY, MORE ALTERNATIVES

What if we reinvented daily mobility? This question is redundant, given the way people’s needs and habits are changing. Private car use is slowing down in many cities around the globe. And yet familiar public transport modes like metros, trams and buses don’t always meet everyone’s needs. As revealed by surveys conducted by Keoscopie (an observatory of mobility trends developed by Keolis), in 2007 passengers’ mobility needs are very different, including on their daily commutes. Our surveys also show that people don’t always opt for the same transport modes at the same time every day. Depending on their needs, desires and the weather, they might change routes or switch to another mode of transport. And of course, mobility is no exception when it comes to evolving consumer trends and economic models, with sharing and rental options increasingly popular. To keep pace with these changing patterns, we need to develop new mobility solutions that are integrated into existing networks, but also in less populated areas poorly served by public transport.

TODAY’S MAJOR CHALLENGES

2019 ANNUAL REPORT

NEW NEEDS, NEW SOLUTIONS

To attract new passengers and improve services for outlying areas, we’re innovating to integrate complementary modes of transport into existing conventional networks.

We’re introducing new mobility solutions to offer more intermodal options that allow people to get from A to B as seamlessly as possible, without using their car and with a minimum number of changes.

ON-DEMAND TRANSPORT GOES REAL-TIME

We launched (or continued) several real-time on-demand transport services in the French cities of Bordeaux and Orléans, in Newcastle (see p.18) and near Sydney in Australia, as well as in Orange County (California) and Las Vegas (Nevada) in the United States. Real-time on-demand transport provides better connections to less densely populated areas with major transport services. For passengers, the benefits are clear: they can book a ride, even at the last minute, and track the arrival of the vehicle in real time. What’s more, any type of vehicle can be used for real-time on-demand transport depending on local needs and the transport challenges that the transport authority wants to solve, including the use of vehicles accessible for people with reduced mobility.

CARPOOLING AND CYCLING TO DISCOURAGE SOLO DRIVING

We provide pre-scheduled and instant carpooling services in partnership with start-up Instant System in a host of French cities, including Lille, Rennes, Bordeaux and Dijon. We’ve also teamed up with Cmabulle, a shared mobility solution which allows parents to share school runs with other parents and take turns to drive children to out-of-school activities. The service uses a dedicated app of the same name in Le Mans, Lille, Orléans, Rueil-Malmaison and Saintes. At the same time, we’re also keeping pace with the growing cycling boom – especially among city dwellers. In Bordeaux, our Cyclo6 subsidiary rolled out 1,000 electric bikes in January 2019, which now account for half of the city’s shared rental bikes. The second largest bike-share operator in France, we have more than 20,000 bicycles in France and the Netherlands and offer a diversified range of models (classic, electric, cargo) and services (self-service, mid-long-term hire, docking solutions, etc.).

AUTONOMOUS SHUTTLES FOR THE CITY

Leading the way in autonomous mobility since 2016, we launched several new autonomous electric shuttle services in 2019: in Monaco, Candiac in Quebec (see p.19) and Lyon, where two new shuttles now serve the Groupama Football Stadium in addition to the services in the Confluence eco-district. We were also awarded a contract for an autonomous shuttle service in Montreal to start in 2020, along with new trial services in the French cities of Rennes and Lille to serve their university campuses, as well as in Newcastle in Australia. In addition, we’ve set up a dedicated 80-hectare autonomous mobility site in Châteauroux, France, which is closed to traffic, to test new autonomous mobility solutions and grow our expertise in fleet management of fully autonomous vehicles without operators on board.

SUPPORTING CHANGE TO ENSURE BUY-IN

Rather than developing standalone offers, Keolis encourages take-up of these new mobility solutions by integrating them into intermodal transport systems featuring last-mile solutions from multimodal transport hubs (P+R, bike shelters and feeder cycle lanes), and integrated fare systems. Awareness efforts are another key to success, so when we launch new services such as real-time on-demand transport, we run information and communication campaigns to let travellers know what’s available. In Lille and Dijon, we organised a “car-free month” in 2019, encouraging drivers to leave their vehicles at home and take advantage of unlimited free access to all the transport and mobility services offered by the two cities. We also harness digital technology by developing apps to attract new digitally savvy customers.

As a key driver of business transformation to ensure buy-in to new mobility solutions and new technologies, our change management support approach is also applied to our employees.
NEWCASTLE IN AUSTRALIA ADDS NEW MOBILITY CHOICES TO ITS MULTIMODAL NETWORK

As well as starting operating Newcastle’s new tram service in February 2019, Keolis Downer, our Australian subsidiary, rolled out the city’s new real-time on-demand transport service in October. Dubbed ‘Newcastle On Demand’, this innovative service is designed to ease the commute to the city’s business district. It’s the second service of its kind, after the one launched in 2018 to serve residential districts, which has proved highly successful (6,000 trips per month, around 200 per day with 98% satisfaction levels). Customers can book their ride in real time within a 10 km radius in the service zone. To deliver this service, we partnered with New York-based tech company Via and car-sharing service GoGet. Seamlesslly integrated into the existing Keolis Downer-operated tram, bus and river shuttle network, this new service is part of the Newcastle Smart City Programme. The aim is to offer alternatives to single occupancy car use and encourage people to adopt shared mobility. The Newcastle network is Australia’s first multimodal network to be privately operated. Overall ridership on the network increased by 23% year-on-year thanks to seamless modal integration, the re-design of the bus network, the arrival of the tram and more mobility choices.

CANADA ROLLS OUT FIRST AUTONOMOUS SHUTTLE ON PUBLIC ROADS

Following a conclusive three-month trial in the autumn of 2018, an autonomous shuttle operated by Keolis Canada was back on the streets of Candiac, near Montreal (Quebec) in May 2019 for a longer trial service lasting more than seven months. The shuttle operated on a 2 km circuit and crossed a large intersection thanks to smart traffic lights connected to the vehicle. This was Canada’s first electric autonomous shuttle to operate on public roads in mixed traffic. To deliver the project, Keolis Canada helped secure an amendment to Quebec’s Highway Safety Code authorising the use of autonomous vehicles.
**Making Journeys Easier**

Apps, e-commerce, connected devices and more — mobility is riding the wave of the digital transformation. To make shared mobility more attractive, we need to leverage these digital technologies to offer passengers a more seamless, personalised and enjoyable experience. Today, digital technology is enabling us to roll out innovative solutions at all touchpoints of the customer journey. For example, we’re making it easier to buy and validate tickets with contactless payment, post-payment and open-payment solutions. Digital technology also underpins the first MaaS (Mobility as a Service) ecosystems, which allow travellers to use a single app to choose, combine, book and pay for all mobility solutions offered in a city or region, irrespective of mode. What’s more, the latest advances in data analytics and artificial intelligence offer new opportunities for continuously improving service quality and reliability as well as meeting a key passenger expectation: real-time information, especially in the event of delays or disruptions.

83% of city dwellers worldwide think technology plays a key role in simplifying their journeys.

Source: Keoscopie International.

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**Keolis’ response**

**Pioneers of Connected Mobility**

Drawing on digital technologies, data analytics and artificial intelligence, coupled with our ability to identify, engage and coordinate partners with complementary expertise, we’re innovating to simplify the passenger experience and increase the efficiency of the mobility systems we operate.

In 2019, our solutions to simplify mobility for passengers at all stages of their journeys in major cities and smaller communities included the vocal mobility coach in Dijon (see p.22), e-paper displays with enriched passenger information (Chambery and Paris region in France as well as in Newcastle in Australia), apps for tracking buses in real time from a smartphone (Caen, Agen, Dreux, Honfleur) and a chatbot deployed in the region of Quebec by Keolis Canada.

**The Winning Ticket for a Paperless Future** To encourage ridership on networks of all sizes, we’ve developed a range of paperless ticketing solutions. In Dreux and on intercity lines in the Bourgogne-Franche-Comté region, we’ve rolled out onboard contactless payment by card. In Lyon, the m-ticket solution enables passengers to buy and validate tickets using their smartphone, while in Wales they can even use their smartwatch. This winning formula has also been welcomed on the commuter rail network in Boston, Massachusetts, where the m-ticket was launched in 2012 by the MBTA. The Keolis Boston team enhanced this technology to allow passengers to pay onboard with credit cards and enable stronger revenue protection measures.

**Open Payment for the Benefit of Passengers** Open Payment is another success: it allows passengers to buy their tickets using their smartphone or contactless payment card, with payment automatically adjusted to actual usage and debited later. Launched with Dijon Métropole in April 2018 on buses and trams on the Divia Mobilités network, Open Payment accounted for over 13.5% of tickets sold and registered 191,000 users by the end of 2019 — 10% of whom were new network users. As hassle-free as the m-ticket, Open Payment also offers another advantage: from the third trip on the Dijon network in the same day, the day pass rate is applied, allowing an unlimited number of journeys. To develop the highly complex e-payment functionality, we coordinated the interaction of a dozen different partners. It’s a prime example of one of our strengths: the ability to mobilise a whole ecosystem of startups and innovation frontrunners with complementary expertise on a project. For the same reason, we supported innovation labs in Wales and Boston in 2019 to nurture startups in developing ingenious new solutions for a better passenger experience.

**MaaS: Much More Than a Digital Solution** MaaS (Mobility as a Service) allows travellers to use a single interface to choose, combine, book and pay for all mobility solutions offered in a city or region, irrespective of operators. It requires coordination between a whole host of public and private-sector players to put together the package of services, choose the technical solutions, create the business models and agree on a common system of governance. By capitalising on our multimodal expertise and knowledge of the cities and regions we serve, we’re able to support PTAs in Lille, Rennes and Dijon with their MaaS projects. Similarly, our ability to innovate and work side by side with other players makes us the preferred partner for pioneering cities striving to become smarter, such as Dijon (France), Doha (Qatar) and Newcastle (Australia).

**Data Driving Operational Excellence**

Ingrained in Keolis’ DNA, our innovation strategy also encompasses other areas like maintenance (see p.25) and operations. For example, we’ve launched several trials where we adjust the number of buses and their service speeds on a route based on analysis of passenger data and information collected by Wi-Fi and Bluetooth® hotspots.
Since October 2019, passengers on the Divia network in Dijon, France, have had access to a voice assistant to make their daily journeys simpler. A first in France in the urban transport sector, this virtual assistant offers a conversational voice experience from a mobile app. Using artificial intelligence, smart data and voice assistance, our ‘mobility coach’ offers an inclusive experience for passengers, supporting them in their travel requirements. It couldn’t be easier to use. They simply talk to the assistant using everyday language with questions like: “How do I get to the park?” “What time does the L3 bus stop at Albert 1?” and “What’s the traffic like on the tram network?” Fun, practical and interactive, this innovation is based on the principles of privacy-by-design and was jointly developed and tested for six months with a panel of passengers. It’s an iterative and collaborative initiative that’s giving us closer insight into usage patterns. And it’s an ongoing learning experience with new user requests helping us to improve functionality and make the tool smarter by harnessing deep learning and machine learning.

Twice a year at night, a specially equipped tram scours the 250 km of Yarra Trams, Melbourne's tram network, built over a century ago. Its mission is to collect data on the condition of key infrastructure such as tracks, wires and stops for the Keolis Downer teams who operate and maintain the world’s largest tram network. Fitted with 3D lasers, sensors and cameras, the ‘survey tram’ analyses, maps and records every tiny detail, right down to the weeds growing along the tracks. This innovative technology helps the teams schedule preventive and predictive maintenance tasks and better plan the necessary upgrades in the next few years on each of the 24 lines. Every year, more than AUS $81 million is invested in maintaining the network to keep it running reliably while ensuring safety and optimum quality of service.
ECONOMIC AND OPERATIONAL EFFICIENCY

CARRYING MORE PEOPLE BY OPTIMISING INVESTMENTS

Despite increasing pressure on finances, public transport authorities (PTAs) are facing a significant investment demand to meet the needs of a growing and demanding population. In densely populated zones, expectations are high to increase network capacity, upgrade existing infrastructure and extend services to new areas, while delivering a smooth passenger experience that encourages people to leave their cars at home. The equation is equally complex in less populated areas, where resources are limited in the operation of networks serving vast regions with multiple population centres. In cities as in rural areas, the financial equation becomes even more challenging if we expect to make the transition to greener energies with an electric bus still costing twice as much as its diesel equivalent.

Added to these challenges, recent regulatory changes in France have reshuffled the deck for PTAs. The new remits require PTAs to rethink mobility from a much broader perspective in order to optimise governance and better serve the various urban, interurban and rural communities. Addressing these issues requires continual optimisation of the economic and operational efficiency of networks in pursuit of greater mobility at the most advantageous cost.

4.3 BILLION people in cities in 2018 compared to 2.6 billion in 1998 (World Bank).
€4.23 BILLION in France, the cost of operating public transport networks, excluding Paris transport operator RATP, came to €4.22 billion in 2017, with €3.34 billion of ticket revenue (Mobility Observatory, UTP public transport union, 2018).

18% The proportion of operating costs supported by passengers on French networks serving populations from 50,000 to 100,000 in 2015, compared to 31% in 2000 (Data Lab, French Ministry for the Ecological Transition).

Keolis’ response

OPTIMISING THE PERFORMANCE OF EACH NETWORK

With our expertise in each component of the mobility value chain, we support public transport authorities in their drive for greater economic efficiency in terms of both revenue and expenditure.

Delivering operational and economic efficiency is at the heart of the partnership relations we build with each PTA, with the aim of applying the methods and solutions which have proved their worth across our 300 subsidiaries.

BOOSTING REVENUE

The first lever is boosting ridership by winning new passengers, like in Boston, where we’ve created a special weekend fare. We’re also building the loyalty of existing customers, like in Lyon, where passengers collect points each time they travel, which add up to rewards. This dual objective of attracting and retaining passengers also means sharing Keolis’ customer-facing culture among staff, especially those in direct contact with passengers, through the Keolis Signature Service programme.

OPTIMISING OUR OFFER

Attracting and retaining passengers also means designing a mobility offer that better meets expectations, such as improved services for certain areas, as well as frequency, punctuality and reliability, as we’ve done in the Versailles-Grand Parc urban community (see p.27). In Caen, the launch of three new tram lines, coupled with the reconfiguration of the bus network and the new city circular line, led to an increase in ridership of almost 6% between August and December 2019. This know-how in network design is aided by our Neolis method, which includes in-depth surveys of passenger expectations, analysis of all relevant data, principles for optimisation of line architectures, based on feedback, and powerful scheduling and simulation tools.

MANAGING ASSETS

Finally, our proven expertise in asset management – with €50 billion of assets managed for public transport authorities and over 10,000 of our staff involved – we support PTAs as they seek to optimise their own asset management strategies. Our teams can provide assistance-to-owner services or even assume delegated oversight responsibility for projects, such as renewal of rolling stock and infrastructure, or even new tram network projects. They can also provide support for the development of medium and long-term investment policies. In 2019, this know-how was put to use on several key programmes including the Avenir Metro in Lyon, the refurbishment of trams in Melbourne (see pp.30-31) and the upgrade of the Boston commuter rail infrastructure to increase reliability and improve service quality for passengers (see p.26).

Enabling operations and maintenance

The third lever focuses on achieving tighter control of operating costs. In our maintenance workshops, for example, we continued rolling out our KIHM initiative1 in 2019, which is based on lean management. And as part of our Maintenance 4.0 programme, the Bordeaux, Lyon, Rennes, Tours, Docklands Light Railway (London) and Yarra Trams (Melbourne) networks now use innovative digital tools to improve the maintenance of rolling stock and infrastructure. A number of initiatives are serving the same objective on the operations front. For example, processing ridership data collected by our subsidiaries and external partners enables us to analyse passenger flows in precise detail in order to optimise scheduling on bus routes, adjust frequency of service to demand and better target inspection to combat fare evasion. And on the Rennes and Lyon metros, an innovative system recovers the energy from braking trains and transfers it to trains pulling out from the station. The upshot is a 10% reduction in electricity consumption.

Today’s major challenges

2019 ANNUAL REPORT
ECONOMIC AND OPERATIONAL EFFICIENCY

Boston: significant progress continues

In 2014, we won the largest rail contract ever awarded in North America to a private operator, with the challenge of strengthening the organisation and enhancing service on the MBTA Commuter Rail serving the greater Boston area (640 km). This network has historically been neglected in terms of investments, particularly the rolling stock and infrastructure. Nearly six years later, there are significant and important signs of progress and recently the pace has accelerated. This business delivered a positive operating margin in 2019 for the second year in a row. Some 127,000 passengers now use the commuter trains in the greater Boston area every weekday, a ridership increase of 22% since 2012 partly due to industry-leading marketing initiatives developed by Keolis in a new revenue-sharing agreement with the PTA. Punctuality also improved from 87% on average between 2006 and 2015 to 89% since 2016. In parallel, ticket revenue has increased by 25% from 2016 to 2019 – a measure also credited to Keolis’ new revenue-sharing partnership focused on growing ridership and deploying revenue protection best practices.

As part of the improvement plan we’ve been pursuing in the last few years, Keolis Commuter Services (KCS) also launched in 2019 a major programme to refurbish the network’s 139 stations. This €25 million project funded by the MBTA transport authority includes deep cleaning and wide-ranging work to improve the passenger experience. KCS also won a contract for double-track extension on part of the network to increase reliability and improve the quality of services offered to passengers. In addition, KCS’s environmental actions and corporate social responsibility policy were honoured by APTA, the American Public Transportation Association, in early 2020 with a Gold Sustainability Award for its commitment to organisational enhancements focused on environmentally-friendly business practices.

Versailles' new network: success across all lines

A real “big bang” moment took place in Versailles Grand Parc urban community, just southwest of Paris. To meet the evolving mobility needs of its 270,000 inhabitants, we worked with Île-de-France Mobilités and other local authorities to develop a new transport plan for a bus network better tailored to the area and citizens’ expectations.

Since August 2019, the Phébus bus network is simpler and structured around 21 routes, compared to 34 previously, with three main routes used by 70% of passengers. Ridership has increased on most lines, and new services have been created in the evening. Designed to encourage intermodal travel, the new network offers more frequent and varied links with other hubs in the Paris region, such as the new Versailles Chantiers multimodal hub (where we manage the bus station) and the Montreuil and Celle-Saint-Cloud stations. It also provides better services for major amenities such as the business area, the university, the hospital and the shopping centre.

The result of over three years of close cooperation with Île-de-France Mobilités and local authorities, this new network benefitted from a vast change management programme conducted with passengers and other local players prior to the launch.

Today’s major challenges

2019 annual report

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Be it public transport authorities, passengers, employees or citizens in the regions where we operate, we listen attentively to all our stakeholders in order to co-develop innovative, customised mobility solutions. Day after day, we focus our efforts on satisfying all their needs.
for Keolis, each network is unique and specific to its territory. From megacities to rural towns, each community faces its own challenges in terms of geography, population, budget and mobility needs. In fast-growing cities, networks need to be designed from scratch. This was the case, for example, in the Indian city of Hyderabad, where automated metro has helped significantly reduce road traffic congestion since its launch in 2017. It was also the case in Shanghai, China, where in 2019 we inaugurated the Pudong airport automated metro as well as the final section of the Songjiang tram network. In large cities with mature networks, we work with public transport authorities to adapt their existing mass transit systems to regional development. Examples include Lyon in France, Waterloo – one of the most dynamic regions in Ontario, Canada – where we have launched a new tram network, and Manchester in the UK, where ridership of the tram network has doubled in ten years. Keolis also offers solutions for regions with airport infrastructure, such as Greater Paris in France, Aarhus in Denmark, Gothenburg in Sweden and Boston, with its commuter rail network and its airport automated metro as well as the final section of the Songjiang tram network. We also leverage our technical expertise and in-depth understanding of the needs of medium-sized cities. In 2019, we predicted that ridership on the tram network in Greater London would reach saturation point in 2020, due to annual increases in ridership of more than 5% in recent years.

OPERATIONAL EXCELLENCE ALL YEAR ROUND

Keolis is committed to delivering the best possible service at every stage of our contracts.

Cooperation between our teams and local transport authority SYTRAL led to the launch in 2017 of a seven-year programme to automate a second metro line, double the number of metro trains and transfer rolling stock from one line to another. Investing in these solutions should enable SYTRAL to continue to have the French network with the highest ridership per resident (330 journeys per resident, per year) for another ten years.

Keolis is committed to delivering the best possible service at every stage of our contracts.

Connecting communities

Many communities wish to connect outlying areas with major network hubs thanks to local transport services. In Newcastle, Australia, where we operate the country’s first multimodal network entrusted to a private operator, we launched a tram service in 2019 that goes through the centre of the city and connects people with heavy rail, key points of interest and the beach. It’s also integrated with other modes of transport, including buses, ferries and real-time on-demand transport services. Also delivered in Sydney, real-time on-demand transport is an innovative way of connecting residential areas to the bus network and business clusters, to make commuting easier for local residents. The tram-train is another innovative mode of transport ideally suited to large territories like Aarhus (Denmark) and Greater Paris. The tram-train fits seamlessly into dense urban environments, like a tram, but can reach speeds of up to 110 km/h to serve outlying neighbourhoods like a train. Keolis also connects communities via interurban bus lines. In Sweden, for example, we were awarded a contract to operate a bus service over 65 km between Gothenburg and Borås, using double-decker buses that will run on biodiesel in the long term.

Parking: a key link in the transport network

Keolis offers a comprehensive range of parking solutions, including on-street and city-centre parking, park-and-ride facilities and large car parks for hospitals, cultural and sporting venues, shopping centres and airports.

Each network is unique and specific to each community

Parking solutions encourage people to use different modes of transport and increase ridership of public transport networks. Our EFFIA subsidiary is the number one operator in France for contracts that combine on-street and off-street parking. In 2019, we stepped up our presence in the parking segment in Belgium by acquiring MyPark, which manages 22 car parks with 12,500 spaces in six of Belgium’s main cities, including Antwerp and Brussels.

Service bundles for medium-sized cities

Keolis offers specific solutions adapted to the needs of medium-sized cities. In the mixed urban/ rural region of Greater Bourg-en-Bresse in France, for example, we launched a new network in January 2019 that offers a variety of mobility services via a single app including bus, city centre electric shuttles, bike-share schemes, carpooling, on-demand transport and school transport. Through GO! by Keolis, we also provide communities with a range of on-demand mobility services including on-demand transport and carpooling which are tailored to different environments such as suburban, industrial and rural areas as well as local specifics like connections with other transport.

Preparation for the future

Going beyond our role as an operator, we leverage our technical expertise and in-depth understanding of each region to help public transport authorities anticipate the changes needed in their networks in line with regional development. A good example of this partnership-based approach is the Avenir Métro programme in Lyon. Over ten years ago, we predicted that Lyon’s four metro lines would reach saturation point in 2020, due to annual increases in ridership of more than 5% in recent years.

Keolis is committed to delivering the best possible service at every stage of our contracts.
COMMUNITIES / REGIONS

WELSH RAIL NETWORK OVERHAUL ON TRACK

Just one year after it was taken over by our KeolisAmey Wales subsidiary, significant progress has been made on the Wales and Borders rail network, which comprises 1,623 km of railway tracks. A total of 215 new services and 7,600 additional seats per week were created, thanks to a reworked timetable and the deployment of more trains. Further improvements include the launch of the renovation programme for the network’s 247 stations and ticketing system, the introduction of a new app allowing passengers to buy a ticket with their mobile phone (m-ticket) and enhanced passenger comfort with onboard passenger information, Wi-Fi, air conditioning, electrical sockets and more. And the improvements aren’t over yet. In 2020, our joint venture took overall responsibility for the rail infrastructure (track and signalling) of the Core Valley Lines (CVL) around Cardiff, in the most dense part of the network accounting for 50% of journeys – a first for a private operator in the UK.

CAN YOU UPDATE US ON DOHA METRO OPERATIONS?

“Thanks to the efforts of 1,450 people, our metro is working well. It’s operated and maintained by RKH Qitarat, a joint venture between Keolis, RATP Dev and Hamad Group. RKH has tested the metro under critical conditions and obtained all the necessary certifications. As a result, the metro continues to run smoothly, even when carrying passengers for major sporting and cultural events or encountering heavy rainfall, which is a common occurrence in Qatar in winter. In addition, communication between RKH and Qatar Rail is excellent. Keolis meets regularly with Qatar Rail which enables us to benefit from its expertise in metro operations. The Doha metro has already risen to some major challenges. During the FIFA Club World Cup and Qatar National Day celebrations in December 2019, not long after its inauguration, the network carried up to 300,000 passengers a day. Operations will be even more efficient for the next Club World Cup and we intend to further improve performance in the future.”

His Excellency Abdulla Al Subaie
Minister of Municipality and Environment
and Managing Director and CEO of Qatar Rail

OUR COMMITMENTS

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HOW IS GREATER MANCHESTER’S TRAM NETWORK FAIRING?

"43.7 million journeys were made on the Greater Manchester Metrolink tram network’s seven lines in 2019, up 6.1% from 2018. That's the biggest increase in the United Kingdom. Accessible to people with reduced mobility and primarily run on green electricity with 70% of the power coming from wind turbines and photovoltaic panels, Metrolink is clearly popular with passengers. KeolisAmey offers a very high level of service and maintains close ties with passengers, including via social media. Our eighth tram line has opened in 2020 near Trafford Park in the west of the city, and other extensions are being considered.

We also want to improve connections between Metrolink and other networks (train and bus) to make our public transport system even more attractive. Lastly, we want Greater Manchester to become a city-region where people can get around on foot or by bike – a vision that’s perfectly compatible with the tram network.”

1. 99 stops and 100 km of track.

Andy Burnham
Mayor of Greater Manchester

AUTOMATED METRO BRINGS ENHANCED MOBILITY TO HYDERABAD

In March 2019, we began operating the third and penultimate section of the Hyderabad automated metro in India, adding 10 km of metro lines to the existing 46 km network. It connects the city from east to west, offering its 10 million residents a more reliable, modern and environmentally responsible transport solution. The extended network also serves HITEC City, a major business district in Hyderabad that continues to attract new companies and residents. From an operational perspective, the new section represents a significant technical feat. In addition to the numerous bends along the route, each track can be used in either direction. And since February 2020, the metro network is complete and features 69 km of track on the three lines. Connected to bus networks and railway stations, travelling on the Hyderabad metro network is now safer and simpler for all citizens. Daily ridership is 400,000 passengers and is expected to exceed the one million mark.
In Belgium’s Wallonia region, to meet the mobility needs of a population that’s widely dispersed across small cities and densely populated rural areas, we operate numerous bus lines on behalf of the regional transport authority OTW. After a record €60 million in revenue in 2018 (500 buses, 18.5 million km travelled per year), we were awarded 31 contracts in 2019, enabling us to maintain an equivalent level of activity. This successful performance reflects both the extensive local knowledge of the Belgian team (itself comprised of various subsidiaries with strong local roots) and our expertise in operating urban and suburban buses around the world.

“A PROACTIVELY MANAGED AND ECO-FRIENDLY PROJECT IN QUEBEC

“Keolis Canada decided to use electric buses for its school transport services in our district in Montreal’s northern suburbs, without even having to ask. After a conclusive trial period, which confirmed the reliability of the first two vehicles, Keolis introduced 12 additional electric buses to the daily school circuit in 2019. We’re extremely pleased with the initiative taken and by the project as a whole, which was carried out by Keolis in a very responsible manner. Electric buses are aligned with our commitment to reduce the carbon footprint of school transport in our region, and our students appreciate travelling in buses that are quieter and more eco-friendly.”

Josée Dupuis
Deputy Director of the School Transport Department in the CSDA School District, Quebec, Canada
TO ENCOURAGE THE MODAL SHIFT AND MAKE SHARED MOBILITY INCREASINGLY ATTRACTIVE, PASSENGERS SIT AT THE HEART OF OUR THINKING AND DECISIONS. IN EACH COMMUNITY, WE OFFER SOLUTIONS SPECIFICALLY DESIGNED TO ADDRESS INCREASINGLY DIVERSE USER EXPECTATIONS.

A t Keolis, continuous improvement of the passenger experience is a constant focus in every-thing we do. Thanks to the ‘Thinking Like a Passenger’ programme, all our subsidiaries have access to resources and methods for developing and updating their transport services in sync with local needs and passenger expectations.

DIVERSE EXPECTATIONS Through the studies conducted by Keopsopic (see p.16), we examine not only lifestyle patterns and mobility practices and expectations, but also weak signals that indicate emerging trends and behaviours. The first visible trend is the shift towards a more personalised service. Each passenger is unique and has diverse needs. Today, people want to be able to travel whenever, wherever and however they like. In addition, their reasons for traveling and their transport preferences and times may change from one day to the next. That’s why we’re committed to continuously increasing the options available by offering a wide variety of transport modes including train, metro, tram, bus, coach, on-demand transport, carpooling, car sharing, bicycle, autonomous shuttles. It’s a strategy that’s paying off. In the French cities of Dijon, Lille, Lyon and Bordeaux and in Newcastle, Australia, for example, the development of a multimodal offering has gradually led to increased ridership on each network.

FLEXIBLE SOLUTIONS FOR LOW-TRAFFIC SITUATIONS At certain times, such as late at night, early in the morning and on the weekend, and in certain underserved areas, such as outer-suburbs, rural areas and industrial zones, it’s not about having a wide range of choices. The goal in these situations is to ensure the availability of at least one alternative to the private car.

To meet that goal, we’re increasingly developing flexible solutions suitable for low passenger numbers, such as on-demand transport, carpooling and car sharing. And we’re introducing them in a wide range of areas – in the outskirts of large cities (Bordeaux, Lyon, Nancy, Orleans, Rouen, Rennes in France, Adelaide, Newcastle and Sydney in Australia) and smaller cities (Chambéry, Alès, Moulins, Vesoul in France), as well as in less populated areas like Bassin de Pompey in France’s Grand Est region.

A WIDE RANGE OF INTEGRATED SOLUTIONS Another key user expectation is simplicity. In addition to having a diverse range of transport modes to choose from (multimodality), passengers also want those modes to fit perfectly together for a smooth and seamless journey (intermodality). Keolis is meeting that expectation thanks to our expertise in network design and our ability to develop transport systems on a regional scale, based on a Mobility as a Service (MaaS) approach (see p.27). In Lille, for example, our Ilévia app enables users to find the best way to get from A to B by combining the various transport options we operate (metro, tram, bus, on-demand transport, bike-share) with other solutions, such as TER trains, walking and carpooling. Additionally, the TER lines have been integrated into the ticketing system, enabling users to travel between any of the city’s stations with a single travel pass or for the price of one ticket. In Brittany, the Korrigo transport card gives holders access to various networks, including the Greater Rennes transport network, as well as numerous public services, such as libraries, swimming pools, daycare centres and school canteens.

A SIMPLER USER EXPERIENCE Passengers are seeking simplicity not only during their journey but throughout the entire user experience. In addition to providing real-time multimodal information to help passengers plan their journey, find the best route and check when the next service will arrive, we also make it easier to purchase and validate tickets by deploying various digital solutions (see p.27). These solutions are even available in medium-sized cities like Dreux and Aix-en-Provence, where bankcards have now replaced conventional transport cards and tickets.

A MORE CARING AND INCLUSIVE APPROACH TO MOBILITY Of course, we’re also well aware that our passengers don’t all have a smartphone and aren’t all comfortable with digital tools. Moreover, we know that many of our passengers have mobility-related vulnerabilities including people with a permanent or temporary disability, the elderly and those with literacy or language difficulties (see pp.46-47). We address the needs of these passengers by developing transport solutions for people with reduced mobility, but also by adapting the vehicles and sta-tions/stops in our main networks and by diversifying communications channels for network users to include telephones, ticket offices, call centres and ground staff. Our vision of a more caring and inclusive approach to mobility is also reflected in the importance we place on customer satisfaction on a day-to-day basis. This is illustrated, for example, by the continued rollout in 2019 of Keolis Signature Service programme (Hyderabad, Nottingham, Benascon, Manchester), designed to foster a strong customer-oriented culture, which our frontline staff put into practice every day in their interactions with passengers. It’s also illustrated by the number of employees we have on the ground. In Doha, for example, more than 900 staff, including 640 passenger service officers, are available to provide information and support to users of the automated metro network launched in 2019.

"Transport Focus is an independent watchdog for transport users in England, Scotland and Wales. We represent the interests of thousands of passengers who need to be able to count on a transport system that is seamless, reliable, punctual and comfortable. In 2018, Keolis took over the management of the entire railway network in Wales. We’ve forged close ties with the company since then, to improve the service for passengers and ensure that their interests always come first – a goal that we’re pleased to share with Keolis. The satisfaction survey we conducted among users of the Welsh network has already enabled us to implement some very positive measures with Transport for Wales. In particular, these measures have been designed to achieve improvements in passenger information, disruption management, staff training and fleet management: We’re pleased that this partnership is driving continuous improvement in service quality."
CONTACTLESS PAYMENT COMES TO THE MANCHESTER TRAM NETWORK

Users of Greater Manchester’s Metrolink tram network no longer need to purchase tickets to travel. Since July 2019, passengers have been able to pay their fare using a contactless credit card or a phone or smartwatch with a mobile wallet app. By touching their card or device on smart readers at the start and end of each journey, passengers benefit from the best possible fare and never have to pay more than the daily cap on fares, regardless of how much or how far they travel. The new system makes life much easier for occasional travellers (more than 11.5 million in 2018) and is expected to increase their use of the network by more than 25%.

ON-DEMAND SERVICE FOR THE PEOPLE OF SYDNEY

Experimental on-demand transport service Keoride, which serves Sydney’s Northern Beaches area seven days a week, has become part of day-to-day life for residents in the capital city of New South Wales, Australia. By early 2020, over 240,000 journeys had been made since this innovative solution was launched by Keolis Downer in partnership with Transport for New South Wales in November 2017, and ridership is constantly increasing (nearly 20,000 trips per month in 2019). Given its popularity and the high level of satisfaction among users, for whom Keoride represents an efficient alternative to the private car, the service has been extended until June 2021.

PASSENGERS

LIÇLE’S MULTIMODAL NETWORK REDESIGNED FOR A MORE SEAMLESS PASSENGER EXPERIENCE

Since January 2019, people in the European Metropolis of Lille have benefited from a completely redesigned, more intuitive and more connected transport network. The new Île de France network offers more and faster links, 4G on the metro and a new app that heralds the introduction of MaaS (mobility as a service) solutions. It also guarantees equality of service across the area, with at least one departure per hour in each direction for all municipalities. The seven regional train lines (operated by SNCF) have been integrated into the ticketing system, which is a first in France. Passengers can now take the regional train as well as the metro, the bus or any other forms of transport within the Île de France network for the price of one ticket. The regional train has thus effectively become a fully integral part of the network.
In service sectors like public transport, employee engagement plays a major role in achieving performance and customer satisfaction. Employee engagement can’t be created by decree, but we can motivate employees to do their best by meeting their expectations: meaningful work, a clear environment, meaningful tasks, an understanding of the company’s objectives, recognition for their achievements and a trust-based relationship with their manager.

A SHARED MANAGEMENT MODEL

To leverage these employee engagement drivers, we adopted a shared management framework in 2019 for all countries, subsidiaries and businesses called KeoPeople. The aim is to foster a consistent management culture across the organisation, in line with our KeoLife continuous improvement programme and our core values – “we imagine, we care, we commit”.

In keeping with our collaborative approach, KeoPeople was co-created by managers across the world who have had experience with similar initiatives (see opposite). The project was led by the Human Resources department and focused initially on identifying management attitudes and practices that are easy to implement in four key areas aligned with employee expectations: meaningful work, a clear definition of each person’s role in the organisation, a framework for performance evaluation and recognition, and the availability of future career opportunities.

THE PRIMARY DRIVER OF THE GROUP’S DEVELOPMENT IS THE DAY-TO-DAY COMMITMENT OF OUR 86,500-STRONG WORKFORCE. TO TURN THIS COMMITMENT INTO A COMPETITIVE ADVANTAGE, WE CREATED A MANAGEMENT MODEL IN 2019 ALIGNED WITH OUR EMPLOYEES’ EXPECTATIONS.

MEASURING OUR PROGRESS

To facilitate implementation, the working group behind KeoPeople decided to structure it in the same way as our KeoLife programme. Each entity and its managers can therefore assess their practices according to three levels of maturity and then track their progress. This continuous improvement process is accompanied by a commitment to transparency.

KeoPeople

Objective No. 1: Enhance employee engagement.

Starting in 2020, employee engagement will be measured in every business unit each year via a survey containing around 20 questions, which will allow all employees to express their opinions freely. The survey will enable Keolis to monitor trends in employee engagement over time, in all subsidiaries and throughout the Group.

An Employer Brand that Stands Out

By fostering employee engagement, KeoPeople will also help us retain employees and attract new talent. This is particularly important at a time when Keolis – like all industry players – is faced with a skills shortage while experiencing sustained growth. Not only do we need to recruit a significant number of drivers and maintenance staff, we must also attract candidates who can help us anticipate and adapt to the digital and environmental transitions currently under way. To achieve this, we’ve developed a new employer brand with a single strategic objective – promoting Keolis among potential candidates by showcasing our identity and highlighting the reasons behind our high level of employee satisfaction.

Engagement Driven by the Employee Experience

Four particularly distinctive aspects of the employee experience that help foster employee engagement at Keolis were identified during workshops conducted in various countries and subsidiaries. These four aspects are meaningful jobs, enriching encounters, career opportunities and an agile, dynamic company that allows all employees to take the initiative and ensures that no two days are ever the same.

In their own words

“...basically we make every effort to create a climate of openness and trust among our teams. That’s why we participated in the KeoPeople project. The result for us, in practical terms, is a simplified organisation – based on just two levels of management – and managers who are firmly committed to building trust in their teams. People know each other better and relationships are simpler and more direct. Basically, we communicate better. And that really makes a difference!”

Gry Miriam Olsen
Chair of Keolis Norge.

1 To learn more about KeoLife and the company’s values, visit our website: Keolis.com.

2 Environmental objectives.

3 Occupational health and safety.
EMPOWERING EMPLOYEES TO PLAY AN ACTIVE ROLE IN THEIR CAREERS

Thanks to the MyTalent platform available via the Group intranet, all employees can take a proactive approach to their own careers. They can use the platform to indicate areas in which they have particular expertise or a personal interest. They can also use it to inform the company of their availability to carry out an international assignment or their desire to work on a particular project, such as a bid or the launch of a new contract. Each year, employees also have the opportunity to share their career development, training and mobility aspirations with their managers during their two annual “Talent Dev” career management interviews.

A LEARNING ORGANISATION FOR ALL

Keolis offers all employees numerous opportunities to develop their skills. In 2019, two out of three employees received some form of training. To facilitate access to training and enable all employees to learn whenever and wherever they like, the shift towards e-learning has picked up pace, with 14% of training content now available online versus 2% in 2017. With more than 110 active communities, our online collaborative platform, KeoSphere, also enables employees to share knowledge, experience and best practices across the Group, thanks to dedicated workspaces for each project or profession (CSR, safety, operations, maintenance, modes of transport, etc.).
BECAUSE MOBILITY SHOULD BE A RIGHT FOR EVERYONE, WE ARE ACTING TO MAKE IT EVEN MORE INCLUSIVE. TO ACHIEVE THIS, WE NEED TO UNDERSTAND THE DIFFERENT VULNERABILITIES THAT AFFECT SO MANY PEOPLE.

An integral part of our corporate social responsibility strategy (see opposite and p.48), our ambition is to ensure everyone has equal access to our shared mobility solutions. This objective led us very early on to study the reasons why some people rarely or never use public transport for their journeys. Through our Keoscopie lifestyle and mobility trends observatory set up in 2007, we’ve conducted and commissioned numerous surveys to gain insights into the many barriers to mobility.

They include invisible and unspoken vulnerabilities, such as long-term illnesses and the effects of ageing, cognitive difficulties (illiteracy, language barriers, lack of orientation skills, etc.), economic hardships and digital exclusion. These vulnerabilities, whether temporary or permanent, affect a large part of the population. In France, for example, a survey by Keoscopie found that 30 million people face difficulties when travelling. Globally, 15% of the population, or around 1 billion people, live with some form of permanent disability, according to the World Bank. They are facing economic hardship.

We offer personalised assistance for passengers who need it in cities such as London, Rennes with STAMmeguide (see p.49), Lyon, Lille and Melbourne (see opposite). The objective is to help vulnerable people, such as those with a physical or cognitive disability, anxiety or lack of wayfinding skills use public transport so they can travel more independently. More broadly, we’re focusing on the importance of the human presence on our networks and training staff members to help people who are vulnerable or unfamiliar with the system to travel. In Melbourne, for example, staff on the Yarra Trams network were trained in nonverbal communication and have difficulties with speech due to aphasia, deafness or intellectual disability, as well as tourists with limited English. And in Bordeaux, we trained over 150 bus drivers to assist people with reduced mobility.

Passenger information is another key enabler of network accessibility. Our Kiss Digital subsidiary, for example, has developed a fully accessible passenger information website structure, which is now available to all Group subsidiaries. Through a partnership with Eliax, hearing-impaired passengers in Lille, Bordeaux, Caen and Paris (PAM 75 service for people with reduced mobility) can communicate freely from their computer or smartphone using sign language or real-time speech transcription to help plan their journeys. While in Wales, we’ve introduced an app that lets passengers with hearing impairments communicate with our staff via an interpreter through a video call.

In their own words

Chris Edwards
Manager government relations Vision Australia

“Yarra Trams, Melbourne’s tram network, has set up an Accessibility Reference Group to give a voice to several disabled passenger advocacy groups. As a blind user, I need the tram’s passenger information system to work perfectly. Some of the city’s oldest trams don’t even have one, so we can’t wait for the new trams! Vision Australia also campaigns for easily accessible information at stops, especially where several lines cross. Visually impaired passengers can, of course, always ask other passengers waiting at the stop, but it’s better if they can get by unassisted. The tramTRACKER app is another precious aid. Recently, we helped redesign the audio bollards that provide information on tram services at stops. They were frequently vandalised and have now been replaced with a more robust system. The project was a real joint effort with Yarra Trams, and we were responsible in particular for the braille message on the bollards. Naturally, the Accessibility Reference Group also advocates improvements to meet the needs of hearing impaired people, wheelchair users and people with communication difficulties. The design of the trams, stops and the network in general is a constant focus for the group, along with driver training. We work great as a team!”
RENNES: A NEW ASSISTANCE SERVICE FOR VULNERABLE PEOPLE

Since autumn 2019, we’ve been offering a new assistance service for vulnerable people in Rennes, such as those with mental, cognitive or psychological disorders, or difficulties with wayfinding, memory or communication. Called STARmeguide, it provides personalised support for their travel on the STAR network serving the Greater Rennes region. Throughout their journeys, our guides help them buy and validate tickets, board and disembark, use lifts and escalators, plot their journeys, find their way about, make connections and get off at the right stop.

LYON ACTING TO MAKE MOBILITY EASIER FOR ALL

Building on the many initiatives we’re pursuing in Lyon to make public transport easier for people with reduced mobility, our local subsidiary has launched an action plan to take better account of wide-ranging vulnerabilities, including age-related difficulties. Some 150 staff have had training to date, and co-ideation workshops have been held with staff and voluntary organisations, businesses and other stakeholders to devise new solutions. Among the 20 ideas put forward, four are being considered or trialled. They include a “walking buddy” app and a service that connects passengers with others making the same journey so they can travel together.

In 2020, new signage will be tested on the Lyon network to make mobility easier for people with autistic spectrum disorders.

CITIZENS

Our efforts to promote and deliver inclusive mobility are an integral part of our corporate social responsibility strategy. This strategy is structured around three principles: dialogue with our stakeholders, respect for human rights and fundamental freedoms, and fair practices. The strategy also features four commitments to our passengers, the environment, our people and the communities we serve. Embedded in our Keolis corporate programme, this strategy is based on continuous improvement and ISO 14001 environmental certification as well as a set of transparent performance indicators. We signed up to the United Nations Global Compact in 2004 and have partnered with Global Compact France since 2018.

To find out more, see our business and value creation model (p.4) and our brochure entitled “Driving progress responsibly”, which you can download from keolis.com.
Extending our leadership in the global shared mobility market by delivering innovative, sustainable and inclusive solutions for transport authorities and citizens – that’s the far-reaching ambition powered by our numerous successes in 2019 and informing our growth strategy going forward.
In 2019 we accelerated our actions in favour of the transition to greener energies, scaling up from the trial phase to full deployment.

Keolis can and must figure among the pioneering companies that adopt corporate goals informed by social and environmental objectives which reach far beyond conventional CSR commitments.

These strengths will enable Keolis to come through the crisis with the highest level of professionalism, as we work hand in hand with public transport authorities to weather this storm and bounce back. Beyond these aspects, the COVID-19 crisis has highlighted the need for a rethink on the global economy. Keolis can and must figure among the pioneering companies that adopt corporate goals informed by social and environmental objectives which reach far beyond conventional CSR commitments.
INTEGRATED GLOBAL GROUP

Alongside our historic business as a bus operator, Keolis now integrates all forms of daily transport solutions. We are the world leader in automated metros, the world leader in trams and manage and maintain a series of strategic rail operations. This integrated approach has translated into average annual growth of 7% since 2012 and sustained international development, which for the first time slightly exceeded our business activity in France in 2019. At the same time, Eolia consolidated its position as the second largest parking operator in France, managing 250,000 parking spaces in 2019, up from 15,000 in 2012. A powerful combination of performance drivers underpin this dynamic growth: strong core values and Group-wide policies in areas including industrial, marketing and human resources which are common to our 68,500 employees, a unifying continuous improvement project and an intimate knowledge of the communities and citizens we serve thanks to Keosphere, our mobility trends observatory. Over the years, Keolis has thus established itself as an integrated global player with a distinct corporate culture and brand that strengthen the sense of belonging to a single group among all our employees, whether they work in Melbourne, Shanghai, Lille or Boston.

MEETING THE NEEDS OF CITIZENS AND COMMUNITIES

This growth and development are geared to fulfilling our mission to serve the common good. This means contributing to the vitality of the communities where we operate and improving the quality of life of local citizens by providing shared, inclusive, connected and increasingly sustainable mobility solutions. In short, a mobility which is more passenger centric.

MESSAGE FROM MARIE-ANGE DEBON

As I take up my role as Keolis Group Executive Chairwoman, I’m fully aware of the responsibilities my position entails given the current stakes involved in shared mobility. Keolis faces several challenges – not least the impact of the Covid-19 crisis on ridership across our networks. However, the ongoing situation has also demonstrated just how crucial our business is to the economic, social and environmental well-being of communities around the world.

I would like to take this opportunity to applaud the dedication and commitment of Keolis teams who have worked relentlessly to maintain public service delivery and business continuity despite the unprecedented and challenging circumstances.

I would also like to thank the interim executive board for its work over the last few months in a very difficult context.

SHARED MOBILITY, A FAST-MOVING AND EXPANDING MARKET

I truly believe that public transport will play a central part in efforts to tackle today’s climate and social challenges, and ultimately help build a more sustainable and fairer world.

Our expertise across the mobility chain and the partnership-based relationships built with our stakeholders, especially public transport authorities (PTAs), mean that we already have the capacity to deliver solutions and effectively support the transformations required by communities worldwide. The first step in achieving this is to constantly adapt to passengers’ changing lifestyles, expectations and travel habits. Unlike in the past when passengers preferred a particular mode of transport, today they’re much more likely to switch between different modes, according to their needs, their mood or simply the weather. Our role is to give them this freedom of choice by capitalising on our experience in a wide range of transport modes and integrated solutions deployed in the 15 countries where we operate. We intend to build on our recognised leadership in automated metros, tram networks and autonomous shuttles, and more generally in fully integrated, multimodal systems. We need to stay ahead of the curve, notably by further harnessing digital technology to roll out innovative solutions like real-time on-demand transport and to offer passenger services that make their everyday lives easier.

The very nature of our business means we contribute actively in tackling the climate challenge. Our commitment must continue as a key player, standard-setter and source of ideas to constantly enhance the support we provide to PTAs in achieving their environmental objectives.

In addition, as the Covid-19 crisis adds to the economic and financial pressures facing us, we must be at the forefront of technical, financial and contractual innovation to achieve the best solutions for delivering service excellence and cost efficiency.

CONSTANTLY CHALLENGING WHAT WE DO

Since the onset of the public health crisis, Keolis has met unprecedented challenges, and we continue to do so on a daily basis. However, the crisis has also driven a home how crucial shared mobility is to social and economic welfare. Our operational fundamentals – safety, quality of service and punctuality – are vital strengths, along with our ability to adopt new uses. We intend to leverage this unique combination of expertise to restore confidence in public transport. By succeeding here, we’ll rise to the challenge that drives us, namely, to lead the field in meeting passenger expectations for a more sustainable and inclusive shared mobility.

Shaping the future requires meeting new expectations, adapting our business model to uncertain demand, and being forward-looking in the face of new opportunities. To this end, I would like to thank everyone for their adaptability and enthusiasm.

I truly believe in Keolis’ ability to lead the transformation of mobility and provide solutions to the challenges of the 21st century.

I would also like to thank the interim executive board for its work over the last few months in a very difficult context.

INTEGRATED SOLUTIONS

As a global reference in sustainable solutions, Keolis is committed to delivering a unique combination of expertise, technology and innovation to serve our customers.

Keolis Executive Chairman from 2012 to 2019, Jean-Pierre Farandou reviews the Group’s transformation over the last seven years. Today, Jean-Pierre Farandou is Chairman and CEO of SNCF.

FROM CHALLENGER TO LEADER

In those seven years from 2012, Keolis grew from challenger to become one of the leading players in the public transport sector, moving up from fifth to third place worldwide. We achieved this by determinedly pursuing a long-term growth strategy with three clear focal points. First, building robust relations with public transport authorities by advising and accompanying them in developing the most suitable mobility policies based on our knowledge of their communities and customers and best practices learned from other Keolis entities and elsewhere in the industry. Second, delivering an exceptionally high level of operational excellence. Let me give two examples here: the Yarra Trams network in Melbourne in Australia – the largest in the world – where we were the first-ever operator to be re-selected in the country; and the Docklands Light Railway (DLR), the automated metro network in London, where we managed to improve service frequency, which was already at an impressive level when we inherited the network.

And finally, our unique ability to offer customers innovative solutions for both new forms of mobility and related services.

We have a unique ability to offer customers innovative solutions for both new forms of mobility and related services.
A global leader in shared mobility, we operate and maintain urban, suburban and intercity networks for more than 300 public transport authorities. Our expertise spans over a dozen different transport modes and is delivered across the world.

**BUSES & COACHES**

22,462 VEHICLES WORLDWIDE

3,704 RUN ON ALTERNATIVE FUELS

1,429 ON NATURAL GAS

783 ON BIODIESEL

522 ON BIOGAS

389 ARE HYBRIDS

429 ARE ELECTRIC

80 ON BIOETHANOL

62 ON LPG

10 ON HYDROGEN

**METROS**

362 KM OF TRACK (in operation or under construction)

PIONEER AND GLOBAL LEADER IN AUTOMATED METROS - 240 KM OF TRACK

9 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)

Networks under construction

- Ivory Coast: Abidjan

**TRAMS**

1,008 KM OF TRACK (in operation or under construction)

WORLD LEADER

- Melbourne, the world’s largest tram network: 250 km
- Greater Manchester, the UK’s largest light rail network: 96 km
- Aarhus, Denmark’s first light rail network

25 networks worldwide

Networks in service

- Australia: Gold Coast, Melbourne and Newcastle
- Canada: Waterloo
- China: Shanghai
- Denmark: Aarhus
- France: Besançon, Bordeaux, Caen, Dijon, Le Mans (TA*), Lille, Lyon, Nancy, Orléans, Paris-Ile de France region TIL, Strasbourg (TA*), Tours
- Norway: Bergen
- United Kingdom: Manchester and Nottingham

Networks under construction

- Denmark: Odense
- France: Paris-Ile de France region T1 and T15
- Qatar: Lusail

**URBAN & SUBURBAN**

- Australia: Adelaide, Brisbane, Geraldton, Kalgoorlie, Newcastle, Perth
- Belgium: Antwerp, Bruges, Brussels, Charleroi, Ghent
- Canada: Province of Quebec
- Denmark: Aalborg, Copenhagen, Odense
- France: Aix-en-Provence, Amiens, Bayonne, Beaune, Besancon, Bordeaux, Bourg-en-Bresse, Caen, Chambéry, Dijon, Haguenau, Lille, Lyon, Nancy, Orléans, Rennes, Sarrebourg, Tours
- Netherlands: Almere, Provinces of Flevoland, Gelderland, Overijssel and Utrecht
- Sweden: Dalarna, Gothenburg, Jonköping, Karlstad, Örebro, Stockholm
- United States: California, Florida, Nevada

**BUS AND COACH RAPID TRANSIT**

- France: Amiens, Bayonne, Franche-Comté, Loire Atlantique, Metz (TA*), Pau (TA*), Rennes, Tours
- Netherlands: Almere
- United States: Las Vegas

**AIRPORT SHUTTLES**

- Denmark: Aarhus
- France: Bordeaux, Le Bus Direct – Paris Aéroports, Marseille, Montpellier
- United States: Fort Lauderdale

**TRAINS**

MORE THAN 7,000 KM OF TRACK

15 REGIONAL RAIL NETWORKS

Networks in service

- France: Blanc Argent
- Netherlands: Province of Overijssel, Twente
- United Kingdom: Govia Thameslink Railway, Southeastern, Wales and Borders
- United States: Boston, Washington DC

Networks under construction

- France: Charles-de-Gaulles Airport (CDG) Express
- Senegal: Dakar
- United States: Fort Lauderdale
**AUTONOMOUS ELECTRIC VEHICLES**

- MORE THAN 94,000 KM CLOCKED UP
- MORE THAN 23,000 HOURS OF OPERATION
- ALMOST 190,000 PASSENGERS CARRIED IN 2019 AND 35 SERVICES INTRODUCED AROUND THE WORLD SINCE 2016

**NEW SERVICES LAUNCHED IN 2019**
- Australia: Flinders University, Adelaide and Newcastle
- Canada: Candiac
- France: Lille, Lyon Confluence

**AND ALSO**
- Australia: Sydney
- France: Bègles, Lyon Groupama Stadium, Rennes
- Monaco

**MEDICAL TRANSPORT**

- No.1 MEDICAL TRANSPORT OPERATOR IN FRANCE
- 2,200 VEHICLES
- 4,000 AMBULANCE STAFF
- 200 JUSSIEU SECOURS AMBULANCE CENTRES

**ON-DEMAND TRANSPORT**

- REAL-TIME ON-DEMAND TRANSPORT
- Australia: Newcastle, Sydney, Mount Barker and the Barossa Valley near Adelaide
- France: Aix-en-Provence, Anglet, Bordeaux, Cherbourg, Lyon, Nancy, Orléans, Tours
- United States: Las Vegas (Nebraska) and 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 (PRM)**

- LEADER IN FRANCE
- Newry, Ballymoney, Ballymena, Barrow-in-Furness, Caen, Château-Thierry, Dijon, Lille, Lyon, Orléans, Quimper, Rennes, Tours
- Sweden: Stockholm
- United States: Greensboro (North Carolina), Fresno, Los Angeles metro area and Orange County (California)

**CAR-SHARING**

- France: Arras, Bordeaux, Caen, Château-Thierry, Lille, Metz, Orléans, Rennes

**SEA AND RIVER SHUTTLES**

- Australia: Newcastle
- France: Bayonne, Bordeaux, Lorient and off the coast of Finistère

**BICYCLES**

- OVER 20,000 BICYCLES IN FRANCE AND THE NETHERLANDS (self-service, long-term rental, electrically assisted, etc.)
- France: Agen, Amiens, Arras, Bayonne, Besançon, Blois, Bordeaux, Bourg-en-Bresse, Bourgoin-Jallieu, Caen, Châlons-en-Champagne, Chaumont, Dijon, Laval, Le Mans, Lille, Metz, Montargis, Montluçon, Moulins, Nevers, Obernai, Orléans, Pau, Quimper, Rennes, Roem, Sarrebourg, Tours, Versailles, etc.
- Netherlands: Almere, Utrecht, Veluwe

**CAR-POOLING**

- France: Ales, Besançon, Bordeaux, Bourg-en-Bresse, Caen, Château-Thierry, Dijon, Lille, Metz, Orléans, Sarrébourg

**CMARULLE**

- (app that pairs families for lift-sharing for the school run and out-of-school activities)
- France: Dijon, Le Mans, Le Vésin, Lille, Montargis, Orléans, Rueil-Malmaison, Saintes

**PARKING**

- LEADING INTEGRATED PARKING OPERATOR IN FRANCE (CARPARKS AND ON-STREET)
- Nisa for train station car parks in France
- 500 parking spaces operated in 190 cities in France and Belgium
- 258,000 spaces, including 52,000 on-street
- 83 Park & Ride car parks
Keolis wishes to thank the employees who took part in producing this Annual Report.


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