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## VINCI'S STADIUM EXPERTISE



## THE VINCI GROUP



CONCESSIONS

CONTRACTING



Highways

Car parks

Airports

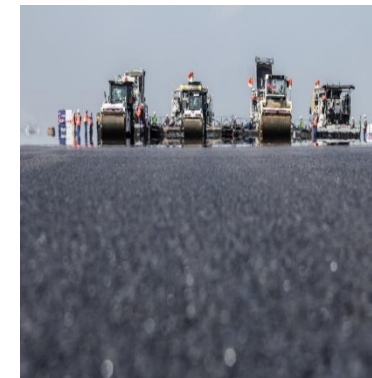
Railways

VINCI  
Stadium

Energies

Eurovia

Construction



# VINCI IS PRESENT ACROSS THE ENTIRE STADIUM VALUE CHAIN

➤ VINCI's unique expertise is based on the complementary nature of its businesses:



**Finance, development,  
programme management and operation**



**Upkeep and  
maintenance**



**Programme management assistance  
Operation**



**Design and build**



## THE STADIUMS DESIGNED AND BUILT BY VINCI

### ➤ The stadiums built by VINCI Construction:

**STADE OCÉANE**



Le Havre, France  
Capacity: 25,000

**NUNGESSER II**



Valenciennes, France  
Capacity: 25,000

**ATATÜRK OLYMPIC STADIUM**



Istanbul, Turkey  
Capacity: 80,000

### ➤ Stadiums under construction / renovation by VINCI Construction:

**PARC OLYMPIQUE LYONNAIS**



Lyon, France  
Capacity: 58,000

**ARENA NANTERRE – LA DEFENSE**



Nanterre, France  
Capacity: 32,000





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## VINCI STADIUM, A VINCI SUBSIDIARY FOR STADIUM OPERATION



## DEVELOPMENT OF THE STADIUM MODEL

### The historic model of French stadiums

- Stadiums mainly operated by **local authorities** and professional **clubs**  
26 of the top 34 clubs – League 1 and Top 14
- Finding: infrastructure often outdated and lacking investment
- Need to **modernise driven by the government** against the backdrop of the UEFA Euro 2016
  - involvement of private companies
  - sector's professionalisation
  - development of services to improve the spectator experience



### The pioneering model of stadiums in English-speaking countries

- Operation professionalised by the professional clubs owners of the rights and specialist companies (AEG, Live Nation, Global Spectrum, etc.)
- The spectator experience at the heart of operation
- The **solutions** provided by **VINCI Stadium**:
  - Develop a new model for efficient and innovative operation
  - Make a long-term commitment alongside local authorities



## LEADING STADIUM NETWORK IN EUROPE

### ➤ A network of 5 multi-purpose stadiums:

- Capacity: 243,000 in sport configuration
- Capacity: 282,000 in concert configuration

### ➤ Which each year host:

- 130 major events
- 5 million spectators

### ➤ At the heart of the UEFA EURO 2016:

- 3 host stadiums: Stade de France, Allianz Riviera and Matmut Atlantique (+ Parc OL built by VINCI)
- Hosting around one third of the championship matches (16 matches out of 51)
- Opening ceremony, inaugural match and final at Stade de France
- Over 900,000 spectators expected at the 3 stadiums



### ➤ Network map:







**STADE DE FRANCE**

**VINCI**   
STADIUM



## AN INTERNATIONAL REFERENCE

### ➤ Contract details:

- Concession contract: design, build, finance, operate, upkeep and maintenance
- Concession-granting authority: French government / Ministry of Sport
- Term of contract: 1995 - 2025

### ➤ History and events hosted:

- Built for the 1998 FIFA World Cup
- IRB 2007 Rugby World Cup
- UEFA Champions League 2000 & 2006 finals
- IAAF 2003 Athletics World Championships
- Host stadium for FFF (football) and FFR (rugby) matches
- International concerts (U2, Rolling Stones, Muse, etc.)
- Outdoor productions (Carmen, Ben-Hur, etc.)

### ➤ Upcoming events:

- FFR: final of the TOP 14
- FFF: final of the French Championship
- Athletics: IAAF Diamond League
- Concerts: AC/DC, Paul McCartney
- UEFA EURO 2016: 7 matches including the final



- VINCI reference since 1998
- Capacity: 80,000 spectators
- Construction cost: €318 M (in 1995 currency)
- Operation company: Stade de France Consortium







**MATMUT ATLANTIQUE**

**VINCI**   
STADIUM



## AN EFFICIENT STADIUM: A SHOWCASE FOR ITS REGION

### ➤ Contract details:

- PPP contract: design, build, finance, operate, upkeep and maintenance
- Concession-granting authority: City of Bordeaux
- Term of contract: 2015 - 2045

### ➤ History and events hosted:

- Designed by Herzog & de Meuron
- Built between November 2012 and April 2015 to host the UEFA EURO 2016 Championship
- Home stadium of Les Girondins de Bordeaux FC

### ➤ Upcoming events:

- League 1: FCGB – MHSC (inaugural match)
- Rugby: TOP 14 semi-final
- FFF: France – Serbia
- UEFA EURO 2016: 5 matches incl. one quarter-final



- The largest stage in Western France
- Capacity: 42,000 spectators
- Construction cost: €183 M
- Operation company: Stade Bordeaux Atlantique







**ALLIANZ RIVIERA**

**VINCI**   
STADIUM

# A STADIUM AT THE CUTTING EDGE OF INNOVATION

## ➤ Contract details:

- PPP contract: design, build, operate, upkeep and maintenance
- Concession-granting authority: City of Nice
- Term of contract: 2011 - 2041

## ➤ History and events hosted:

- Designed by Wilmotte & Associés
- Built between August 2011 and September 2013 to host the UEFA EURO 2016 Championship
- Home stadium of OGC Nice FC
- Football: France – Paraguay
- Rugby: RC Toulon – Cardiff (H CUP); RC Toulon – ASM Clermont & RC Toulon – Stade Français for TOP 14 championship

## ➤ Upcoming events:

- League 1: OGC Nice (22 matches per season)
- FFF: France - Armenia
- Show: Nitro Circus Motor Mayhem
- UEFA EURO 2016: 4 matches incl. one R16 match



- Platform for digital innovations
- Capacity: 36,000 spectators
- Construction cost: €195 M
- The largest naming rights contract in France (Allianz)
- Operation company: Nice Éco Stadium



**Allianz**  **Riviera**





**MMARENA**

**VINCI**   
STADIUM

# A STADIUM AT THE HEART OF A SPORTS CENTRE

## ➤ Contract details:

- Concession contract: design, build, finance, operate, upkeep and maintenance
- Concession-granting authority: City of Le Mans
- Term of contract: 2011 - 2044

## ➤ History and events hosted:

- First new-generation stadium in France
- Football: France – Estonia; SM Caen – Lille OSC & SM Caen – Stade Rennais FC (League 1)
- Rugby: Stade Français – SU Agen (TOP 14) ; Racing Metro 92 – Ospreys (European Rugby Champions Cup)
- Starting point for a stage in the 2011 Tour de France
- Partnership with Automobile Club de l'Ouest (ACO) as part of the 24 Hours of Le Mans circuit

## ➤ Upcoming events:

- Auto event during the 24 Hours of Le Mans Automobile Endurance Race



- First stadium naming contract in France (MMA)
- Capacity: 25,000 spectators
- Construction cost: €90 M
- Operation company: Le Mans Stadium







# **THE STADIUM AT QUEEN ELIZABETH OLYMPIC PARK**



## OLYMPIC GAMES SPORTING HERITAGE

### ➤ Contract details:

- Concession contract: operate, upkeep and maintenance
- Concession-granting authority: E20 Stadium LLP (City of London and Newham Council)
- Term of contract: 2015 - 2040

### ➤ History and events hosted:

- Built to host the 2016 London Olympic and Paralympic Games
- Refurbished as a multi-purpose stadium after the Olympic Games
- Home stadium for West Ham United FC (Premier League) and UK Athletics

### ➤ Upcoming events:

- Rugby: IRB 2015 World Cup (5 matches)
- Rugby League: England – New Zealand
- Athletics: IAAF Golden League; Sainsbury's Anniversary Games; IAAF 2017 Championship



- Group's first stadium concession outside France
- Capacity: 60,000 spectators
- Operation company: London Stadium 185

LONDON | 185  
STADIUM 





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## STADIUM OPERATOR: A RAPIDLY CHANGING BUSINESS

## A VIRTUOUS OPERATION MODEL

### ➤ Development of La Plaine-Stade de France in Saint-Denis:

- Economy: **25,000 jobs created**, new mixed business sector with **500,000 m<sup>2</sup> of office space** and **400 company head offices**
- Social: Advisory Committee enabling ongoing consultation with local residents and associations
- Transport: extension of the RATP network (2 RER stations / Bus routes, A86/A1 motorway access)

### ➤ Expansion of La Plaine du Var eco-valley in Nice (Allianz Riviera):

- Economy: **160 local companies** and **3,000 workers employed** for the construction
- Economy: construction of **Nice One** shopping centre, 29,000 m<sup>2</sup> of retail space and over 500 jobs created
- Energy: a **positive energy** stadium, 7,000 m<sup>2</sup> of **PV panels** and storm water recovery
- Transport: construction of **tram** lines between Allianz Riviera stadium, the airport and Nice city centre



## A VIRTUOUS OPERATION MODEL

### For the home club and the organisers:

- Stadium's economic viability ensured by VINCI Stadium.
- VINCI Stadium's long-term guarantees:
  - A stadium always maintained to the **best quality standards**
  - Upkeep and maintenance
  - **Investment** in human and financial resources
- Benefits for the home club and organisers:
  - Encourages commercialisation
  - Reduces capacity risk
  - Diversification and increased sources of revenue



## A VIRTUOUS OPERATION MODEL



An **integrated model** guaranteeing virtuous operation:

VINCI Stadium acts as the operator right from the design-build phase, in order to **plan** and **maximise** future operation.



## VINCI STADIUM: A MAJOR PLAYER IN A RAPIDLY CHANGING BUSINESS

### VINCI Stadium's four main areas of expertise

- Rich and varied **programming**
- **Innovative services** to revolutionise the spectator experience
- Unique **technical expertise** applied to stadium operation
- An active **partnership** approach

## RICH AND VARIED PROGRAMMING



**Multi-purpose** stadiums benefiting from **regular** and **varied** programming for the **general public** and **companies**

Major sporting events



International concerts



Corporate events



Local events

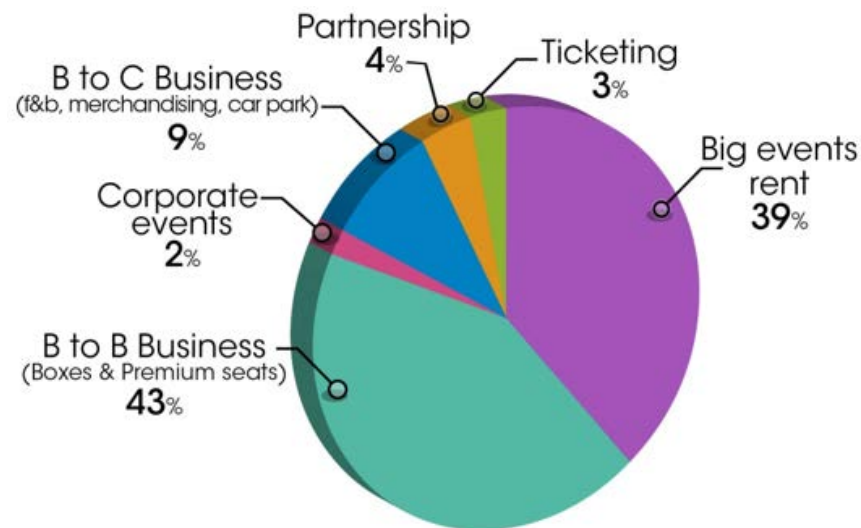




## THE EXAMPLE OF THE STADE DE FRANCE: AN INTERNATIONAL REFERENCE

- Since 1998, the **Stade de France** has been an **international reference**
  - 380 major events
  - Over 30 million spectators
- **Concession contracts:** the concession company shoulders all operating costs

2014 income



2014 programme: 25 major events

FFR	5 french national rugby union team games & 1 TOP 14 Final	24%
Other Rugby	2 TOP 14 games	8%
FFF	4 french national football team games & 1 Cup final	20%
Other football	2 RC Lens Ligue 1 games & 1 League Cup Final	12%
FFA	1 Diamond league meeting	4%
Concerts	8 shows including Rolling Stones, Jay Z & Beyonce, One Direction,...	32%

# STADIUM OPERATOR: A RAPIDLY CHANGING BUSINESS

## INNOVATIVE SERVICES TO REVOLUTIONISE THE SPECTATOR EXPERIENCE

**Connected stadium**



**Food & beverage services**



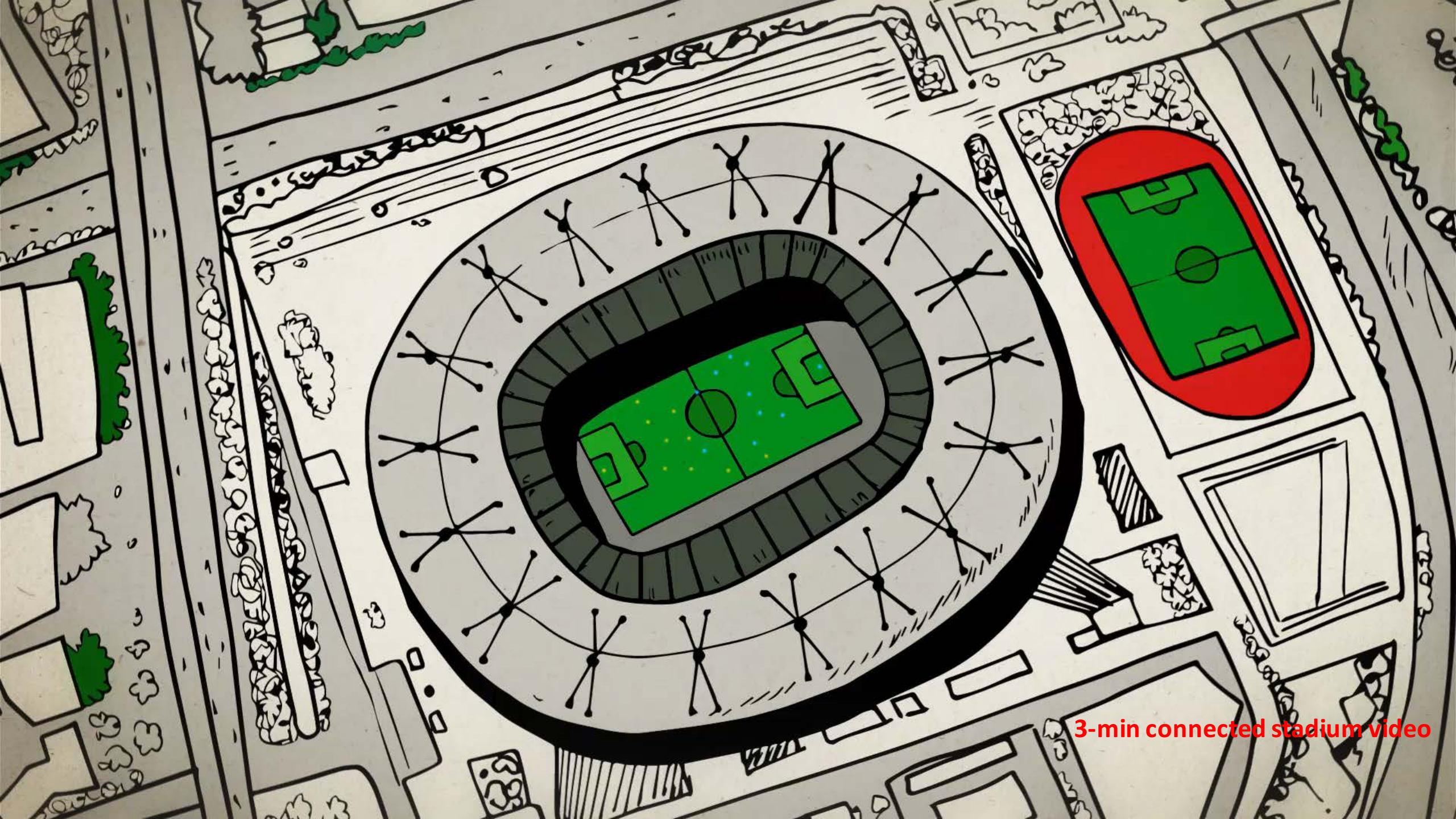
**Customer pathways**





## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE

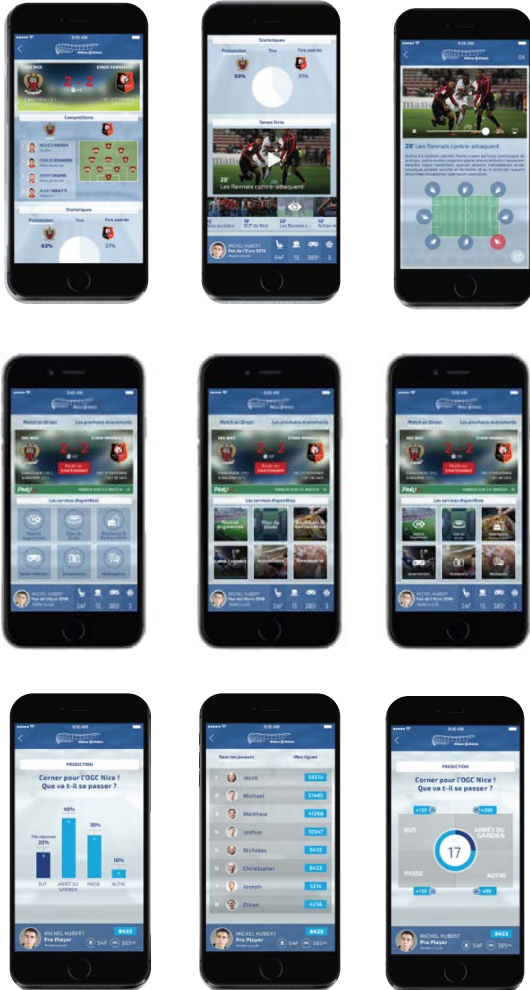
- **HD Wi-Fi** available at our stadiums to:
  - **revolutionise the spectator experience with the development of new digital tools**
  - **create value for all stakeholders.**
- **Stade de France, Matmut Atlantique and Allianz Riviera are all connected**
- The **Stadium at Queen Elizabeth Olympic Park** will have **HD Wi-Fi installed** by August 2016 for the arrival of its home team West Ham United Football Club



3-min connected stadium video



## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE



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LIVE CONNECT

2

ONLINE BETTING

3

GAME CONNECT

4

FOOD & BEVERAGE SERVICE

5

FRIEND CONNECT

6

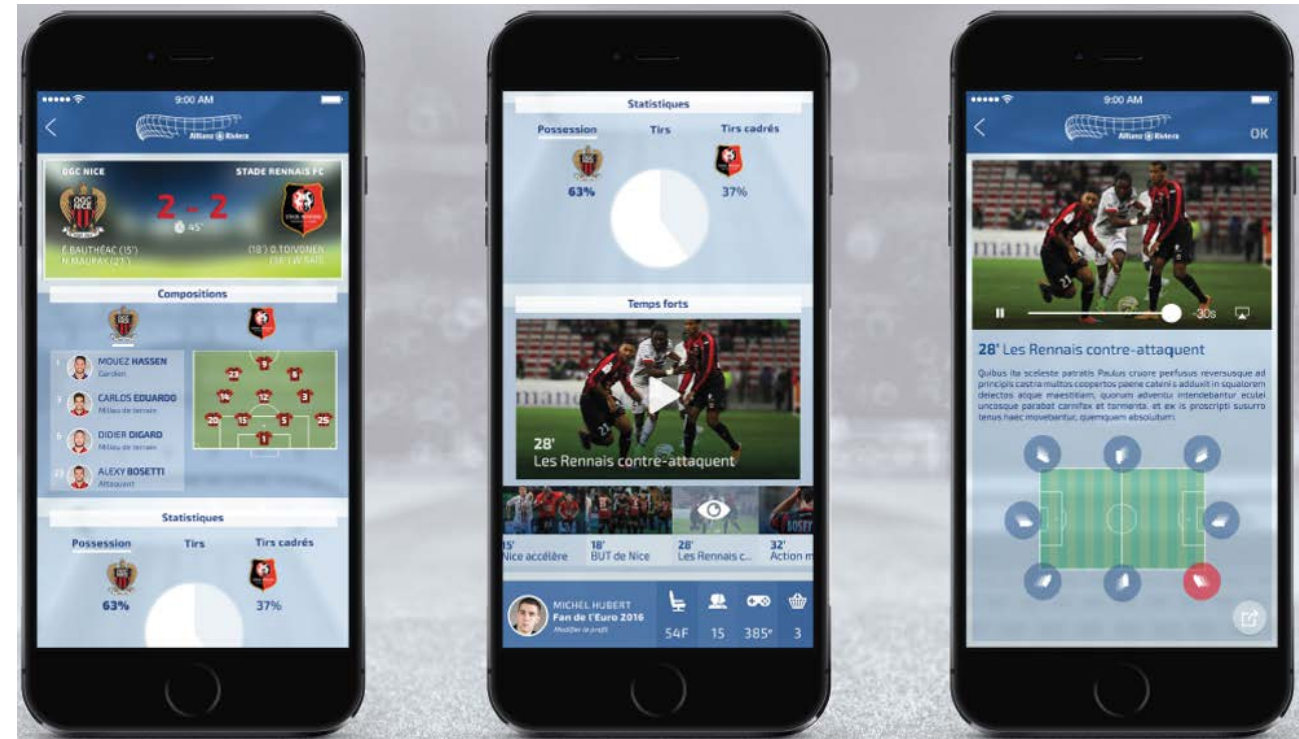
GPS

## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE

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### LIVE CONNECT

See live content: replays, statistics, team compositions, real-time game facts and scores



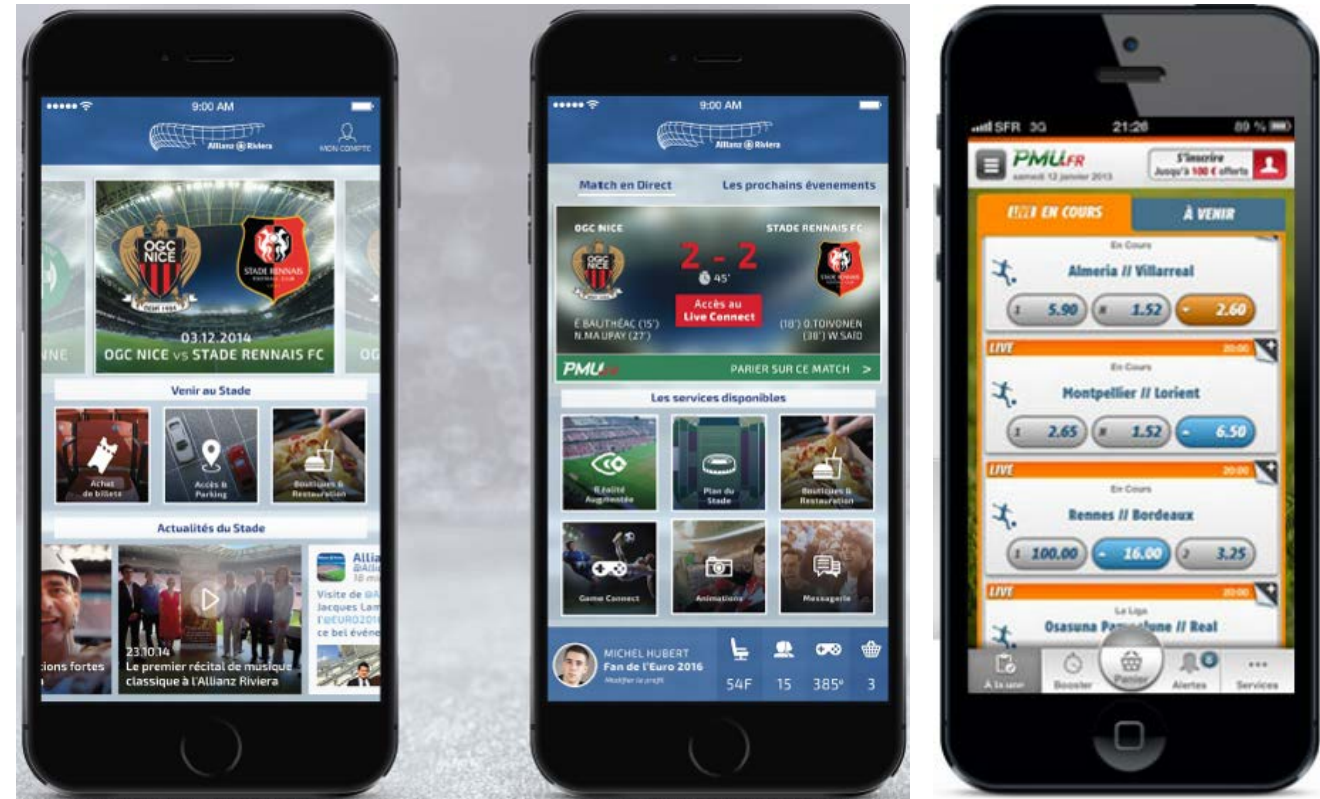


## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE

2

### ONLINE BETTING

Register and place match bets online using the partner operator's app

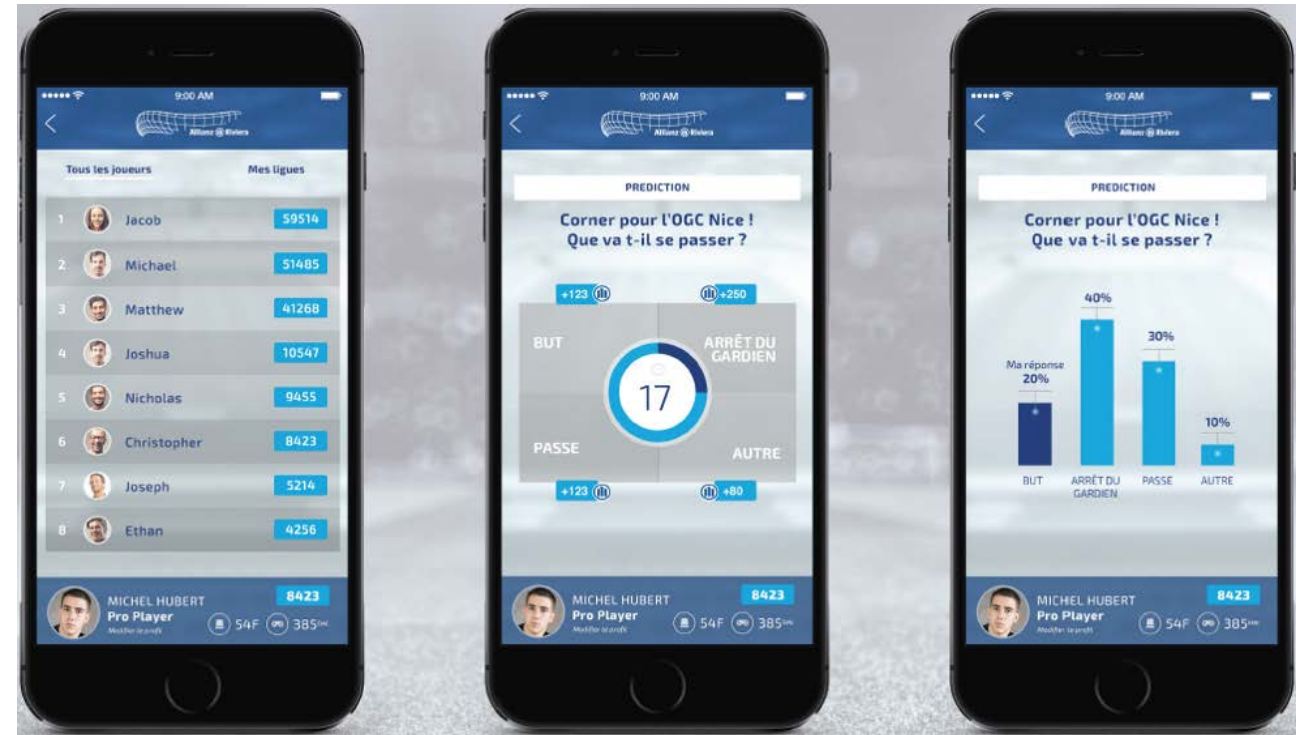


## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE

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### GAME CONNECT

Play online interacting with the stadium community: predictions, knowledge quizzes, etc.



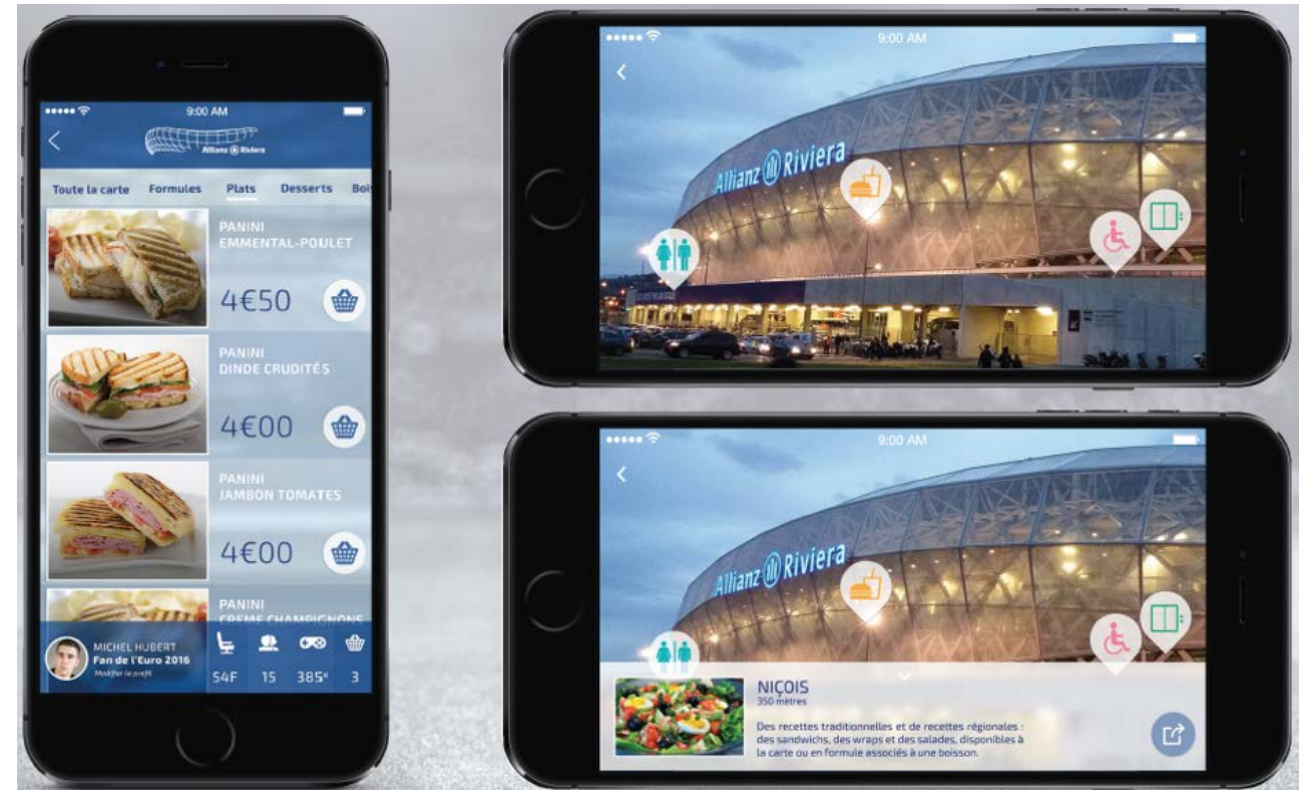


## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE

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### FOOD & BEVERAGE SERVICE

Enjoy discounts, contextualised flash merchandising operations (Happy Hour, etc.)

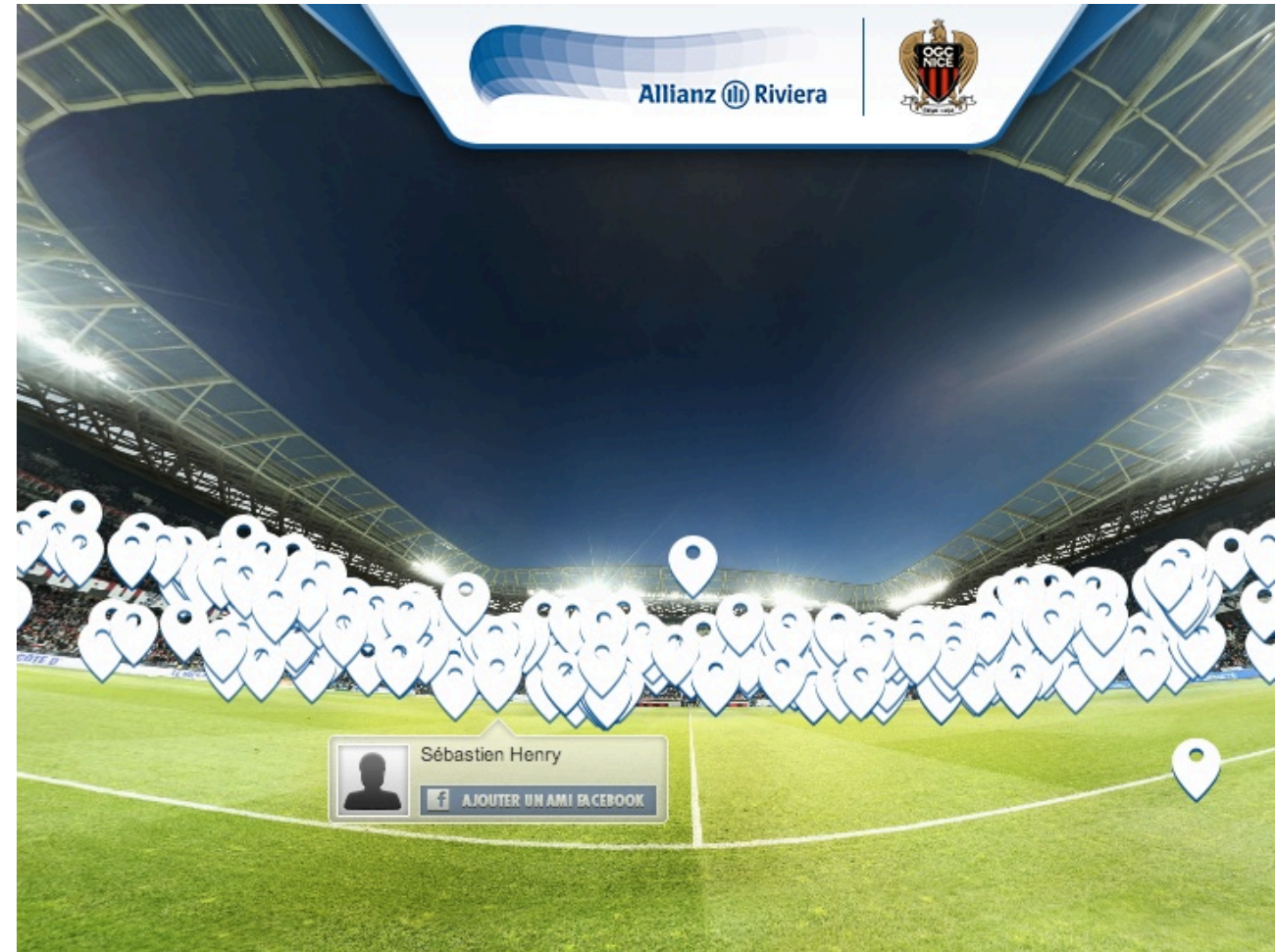


## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE

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### FRIEND CONNECT

Find my friends at the stadium and agree on a meeting place in the stadium



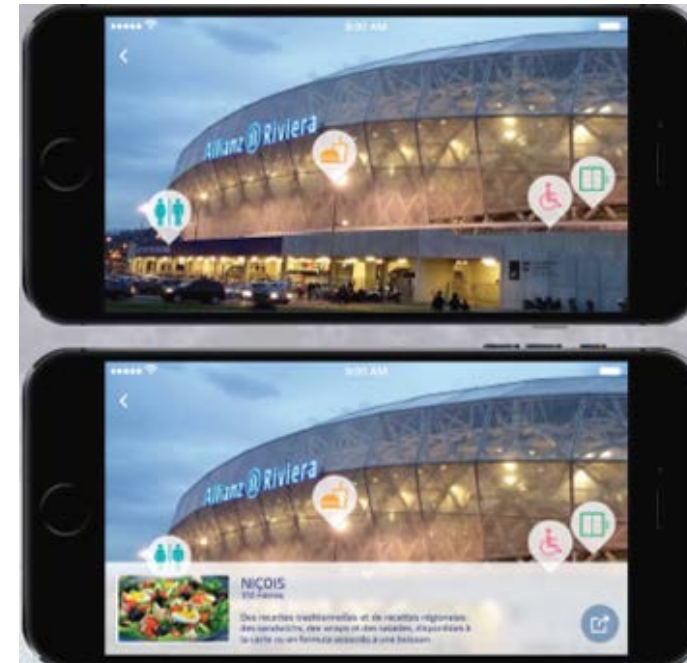


## THE CONNECTED STADIUM: REVOLUTIONISE THE SPECTATOR EXPERIENCE

6

GPS

Activate the GPS function to guide me to my seat, obtain real-time information about queues at the WCs, food & beverage outlets, etc.

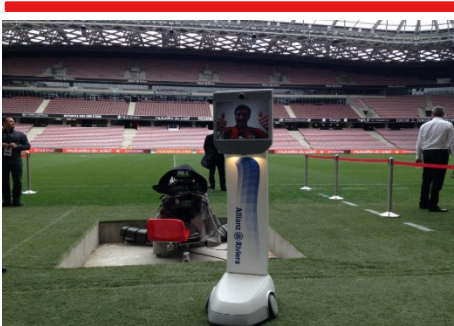


## EXAMPLE OF ALLIANZ RIVIERA STADIUM: AT THE CUTTING-EDGE OF INNOVATION

➤ Creation of a **Fan Lab** in cooperation with the **naming rights holder Allianz** for the 2015-2016 season:

- Trial with **Google Glass**
- **FanCam**: used by visitors to locate tag each other on a 360° image of the stands
- **Hashtag #SocialScreen**: used to send questions to the players and trainers after matches
- **Inside Bot robot**: provide a hospitalised child with a behind-the-scenes match experience
- **3D printer**: print of the stadium
- **Drone**: stadium fly-over

Inside Bot



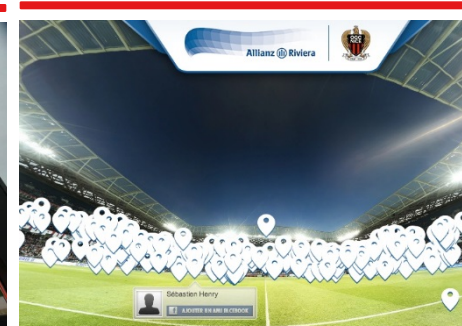
Drone



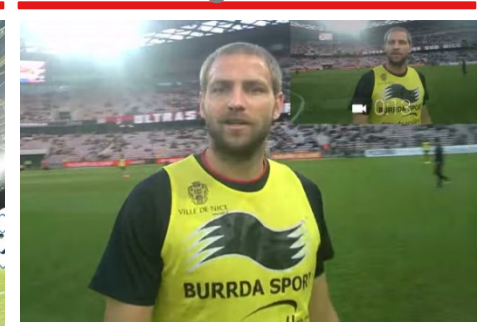
3D printer



Fan Cam



Google Glass





## EXAMPLE OF ALLIANZ RIVIERA STADIUM: AT THE CUTTING-EDGE OF INNOVATION

- Creation of an **Allianz start-up accelerator** specifically for **big data**, connected objects and the **connected stadium**:
  - Five-month intensive acceleration programme
  - Premises at the Allianz Riviera stadium
  - Structured support provided by a network of experts and mentors, and leading investment funders
- The first **VINCI Hackathon** was held here from 10 to 12 April 2015:
  - 48 hours of **innovation**
  - **124 participants** who presented **29 projects**
  - Aim: “**reinvent the spectator and passenger experience**”
  - 6 apps singled out by the judges

**Allianz Accelerator**



**VINCI Concessions Hackathon**



## TECHNICAL EXPERTISE SERVING STADIUM OPERATORS

Field



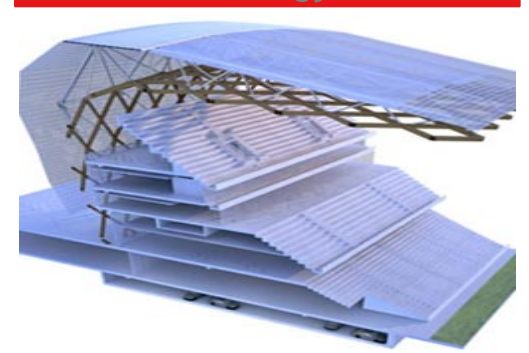
Security



Ticketing



Energy





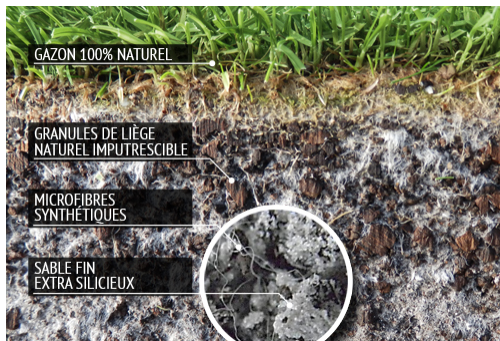
## EXAMPLE: THE MATMUT ATLANTIQUE STADIUM FIELD



Challenge: maintain an **attractive** and **practical field** in a **multi-purpose** stadium

- Turf technology: **hybrid** fields (synthetic substrate and natural turf)
- Laying technique: **seeded** and not roll-out turf
- **Long-term** maintenance programme

Hybrid field



November 2015



December 2015



April 2015



## AN ACTIVE PARTNER APPROACH

High value added, marketing partners provide defining structure:

“Naming rights” partners

“Equipment supplier” partners

“Experience” partners

Allianz naming partner



MMA naming partner



Equipment supplier partner



Experience partner





# VINCI STADIUM: CHALLENGES AND OUTLOOK

- **Take the public-private partnership stadium model to its point of economic maturity**
- **Develop an integrated approach in cooperation with the other VINCI businesses**
- **Be in the forefront of innovative products and services benefiting both customers and stakeholders**
- **Grow internationally**



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