

CONSULTATION PROCESS ON THE 2035/2050 DEVELOPMENT VISION FOR PARIS-CHARLES DE GAULLE

FROM 8 APRIL TO 8 JULY 2025

CONSULTATION PROJECT SUMMARY

sobriety, rail connections, low-carbon energy



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WHY DOES PARIS-CHARLES DE GAULLE NEED A NEW DEVELOPMENT PROJECT NOW?

Paris-Charles de Gaulle is the European Union's leading airport, with over 200,000 passengers daily. It is the main connection hub for France's national airline Air France-KLM and the Skyteam alliance, and is also a major air freight hub.

AS SUCH, A NEW DEVELOPMENT PROJECT IS NOW NEEDED **FOR PARIS-CHARLES DE GAULLE** FOR THREE REASONS:

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To keep pace with traffic growth, even when moderate.

The COVID crisis has had a lasting impact on perspectives for traffic growth. Before COVID, passenger traffic was growing at around 2% to 2.5% a year. Today's outlook is much more moderate, with a 1% to 1.5% increase in passenger numbers expected each year. However, we need to plan to adapt the number of infrastructures and the accessibility of terminals to future passenger numbers and demands.

To offer a low-carbon airport model.

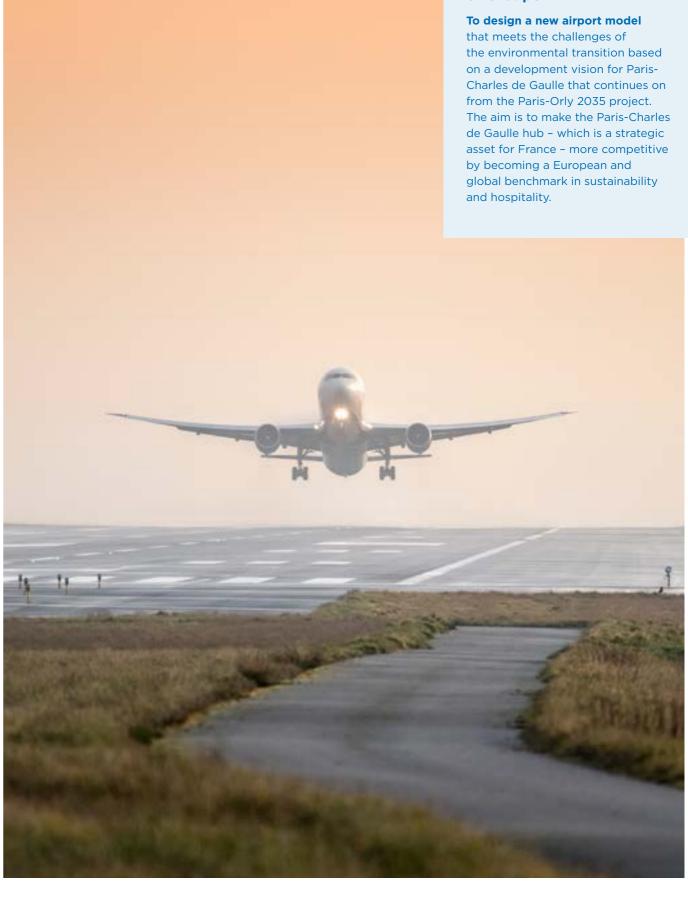
Meeting the challenges of climate change means speeding up the environmental transition of air transport to achieve carbon neutrality by 2050, and carbon neutrality for ground operations (scopes 1 and 2 ¹) in 2035 for Paris-Charles de Gaulle, notably by speeding up the creation of train/plane connections.

To preserve the airport's job creation momentum.

Every day, almost 90,000 employees working for over 700 companies welcome, guide, transport and ensure the safety of passengers and their baggage as they travel all over the world, making Paris-Charles de Gaulle airport a strategic asset for France.

¹ In accordance with the Greenhouse Gas Protocol, scope 1 refers to emissions directly linked to our airport activity (service vehicles, etc.) and scope 2 refers to indirect emissions associated with the production of energy used (purchased electricity, heat, etc.).

The responsibility of Groupe ADP: To design a new airport that meets the challenge



PARIS-CHARLES DE GAULLE AIRPORT

A STRATEGIC ASSET **FOR FRANCE**



PASSENGER AIRPORT IN THE EUROPEAN UNION:

> 76 MILLION PASSENGERS IN 2019

(70 MILLION IN 2024)

HUB²

FOR AIR FRANCE

DESTINATIONS 119 COUNTRIES

HUB FOR LA POSTE AND FEDEX

VOTED BEST EUROPEAN AIRPORT

> AT THE SKYTRAX AWARDS FOR 3 YEARS RUNNING

AND SKYTEAM ALLIANCE

EUROPEAN

160,000 IN ÎLE-DE-FRANCE

90,000 **DIRECT JOBS** AT THE HUB

> 250,000 **IN FRANCE**

OF THE REGION'S **LOCAL EMPLOYMENT**

NATIONAL WEALTH

BILLION EUROS IN NATIONAL ECONOMIC CONTRIBUTIONS,

INCLUDING 22 BILLION IN THE ÎLE-DE-FRANCE REGION (WITH 4.5 BILLION FROM CARGO)

93% PERMANENT CONTRACTS 88% FULL-TIME **POSITIONS**

> **OF THE VALUE** OF FRENCH INTERNATIONAL TRADE,

> > THANKS TO GOODS PASSING THROUGH THE AIRPORT
> > (WHICH REPRESENT A MERE

² A hub is an airport that serves as an airline's base, where passengers or cargo are grouped together and connected to their final destination.

WHAT ARE THE TRAFFIC **TRAJECTORIES** FOR 2035 AND 2050?

If we are to achieve carbon neutrality by 2050³, air traffic in Paris will not grow quite as much as it has in the past.

The introduction of sustainable aviation fuels, and more generally the cost of decarbonisation, will lead to an increase in ticket prices that will likely curb demand. These factors have been incorporated into traffic forecasts.

In addition, this more moderate growth dynamic is also linked to the development of train **services**departing from Paris and Parisian airports, offering travel alternatives for the shortest journeys and thus replacing some short- and medium-haul flight traffic.

In the near future, the average annual growth rate in passenger numbers is expected to be in the region of 1% to 1.5% per year.

BY 2035,

a slight 7% increase in the number of movements (passengers and freight), compared with 2019, is expected, i.e. a total of around 534,000 movements per year. This represents a moderate increase in the number of passengers handled of around 16% in 2035 compared with 2019⁴, i.e. 88 million passengers (compared with 76 million in 2019).

The slight increase in the number of movements is due, on the one hand, to growth driven mainly by long-haul international flights, and therefore by models that carry a large number of passengers, and, on the other hand, to improved aircraft fill rates.

The average number of passengers per flight has already risen significantly: from less than 100 passengers per flight in the early 2000s, this figure has now progressed to almost 170 passengers per flight in 2024.

BY 2050,

current traffic forecasts anticipate a 19% rise in the number of movements compared with 2019, i.e. around 592,000 aircraft movements per year (passengers and freight). This represents an increase in the number of passengers handled of around 38% compared with 2019, i.e. 105 million passengers.

Groupe ADP is committed to reducing noise pollution

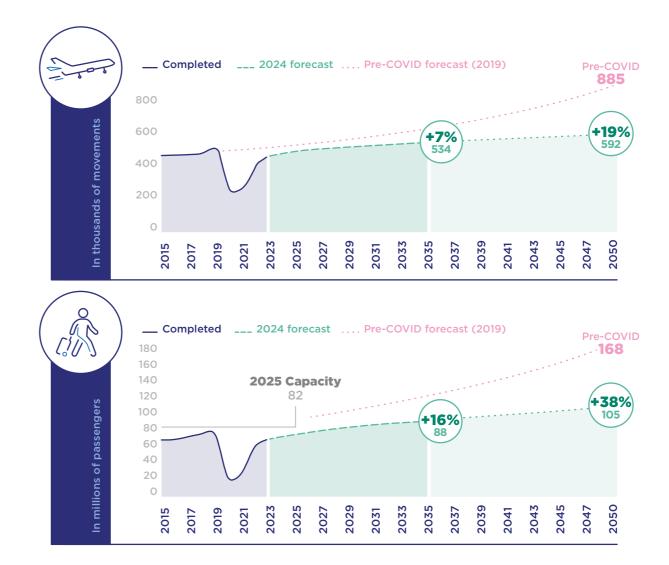
Groupe ADP and its partners have been introducing a range of initiatives to reduce noise for the last 15 years. They are part of a regulatory framework focused on three areas: noise reduction at the source, operational procedures and urban planning around the hub.

Paris-Charles de Gaulle is subject to restrictions, with a ceiling on 'middle of the night' flights (0.30 am - 5 am) of around 17,000 slots per year. Every slot that is unused from year to year is cancelled: as such, 3,500 night slots have disappeared in twenty years.

A number of measures in three key focus areas have thus been taken to reduce noise pollution for residents of the towns and villages located near the airport.

- ◆ Groupe ADP charges companies with noisier aircraft up to 2.5 times more to incentivise quicker fleet renewal. Compared with the rate charged for a latest-generation A320 Neo, an older-generation aircraft will cost 30% more on average.
- ◆ Groupe ADP supports the General Directorate for Civil Aviation in optimising operational procedures (continuous descent landings, optimised take-offs, retracting gears, etc.) to

- avoid stair descents as much as possible, thus reducing the demands made on the engines and limiting noise pollution during the aircraft approach phase as a result.
- ◆ Groupe ADP is spearheading the home soundproofing scheme, using the funds raised from the tax on airborne noise pollution. It processes all eligible applications and supports local residents by offering an assistance service to guarantee the quality of the work carried out.



Traffic projections for aircraft movements (passenger and cargo) and passenger numbers at Paris-Charles de Gaulle airport. Source: Groupe ADP

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³ 90% reduction in emissions, with the remaining 10% offset by carbon sequestration methods

⁴²⁰¹⁹ saw the highest level of traffic at Paris-Charles de Gaulle and these levels have not been seen again since

WHAT ARE THE ASPIRATIONS OF THE DEVELOPMENT VISION FOR PARIS-CHARLES DE GAULLE?

THE OBJECTIVE

To ensure a sustainable future for Paris-Charles de Gaulle.

Sustainable, because the airport will set an example by accelerating decarbonisation and creating value for all its stakeholders.

Sustainable, because the airport will become more competitive by enhancing the performance of the Air France hub and its Skyteam partners, thus improving the quality of service enjoyed by all its passengers.

TO ACHIEVE IT

The development model will no longer correspond to that of Terminal 4, which aimed for a single, massive increase in our capacity.

This is why the planned method is based on a **more gradual** and **pared-down approach** to new constructions.

The airport's entire development vision is underpinned by two key principles:

- sobriety, achieved through modularity and a gradual approach;
- rail connections.

A dual time frame combines a 25-year projection with the first tangible achievements in 10 years' time, guaranteeing a gradual approach that can be adapted to changes in air traffic and the expectations of the regions and the airport community as a whole.

This is therefore an adaptation project designed to reconcile development and decarbonisation, growth and sobriety:

- adaptation to changes in traffic through a gradual and modular approach.
- adaptation to existing infrastructures by fostering better connections between them.
- adaptation to the needs of all stakeholders, by listening to them, via CDG & You, during the three-month consultation process.



IN TANGIBLE TERMS, WHAT DEVELOPMENTS ARE PLANNED FOR 2035 AND 2050?

REMINDER OF THE OBJECTIVE:

To meet growing needs gradually over time, in line with observed demand, without developing excessive capacity.

Between now and 2035,

priority will be given to developing our capacity to welcome passengers on train-plane connections, and to improving the competitiveness of the Air France hub and its Skyteam partners by offering a better connections experience.



Improving the competitiveness of the Air France hub and the connections experience in the short term

Connecting remote stands (only accessible by bus) to a boarding lounge. To the east of Terminal 2E, 6 existing high-capacity aircraft stands will be connected by the creation of a new boarding lounge (2030), supported by existing check-in areas, to improve the quality of service offered to passengers and to make the hub more competitive.

Improving connections between the hub's boarding lounges.

The expansion of the automatic metro line known as 'LISA', which is already in service between Terminal 2E and the T2EL and T2EM boarding lounges, will be extended to Terminal 2G and the new boarding lounge (2030).

A second automatic metro, the future backbone of the hub, entirely dedicated to connections, will be created. This new line will be built along a new route, presaging a resilient model for the future by preparing to connect future developments for new capacity in the north of the airport, which could emerge, depending on traffic growth.

Improving service quality at key and sensitive stages of the passenger journey

- 1 The same logic of connecting remote stands would be applied for Terminals 2ABCD. 5 existing aircraft stands would be connected to a new boarding lounge at the western end of Terminal 2A.
- **2** The main international border controls will be redesigned with adapted, better sized buildings to guarantee improved quality of service.

At Terminal 1, a project for a new border crossing area, buried beneath an aircraft taxiway located between the historic terminal and the international boarding lounge, is currently being examined.

At Terminal 2E, the arrivals border crossing will be transferred to a new building offering a better experience: 4.5 metre-high ceilings and natural daylight.

3 New baggage handling facilities will also be developed to foreshadow connections with future installations.

Developing our passenger capacity via rail connections

Through the development of the CDG2 SNCF train station, with good connections to the Air France-SkyTeam hub.

The 'arrivals circuits' in Terminals 2E and 2F will be redesigned to transform and facilitate the passenger pathway from the baggage reclaim areas to the CDG2 SNCF train station

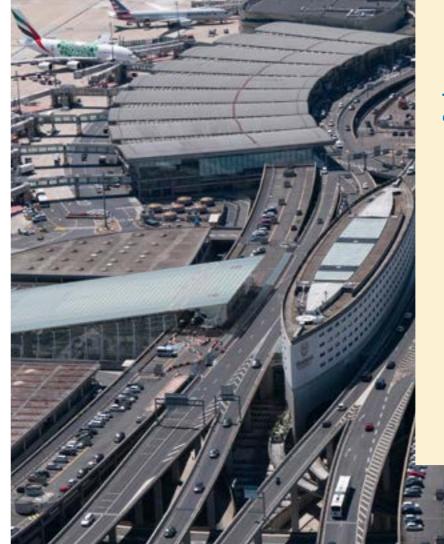
for customers returning to Paris by public transport, or for those embarking on longer train journeys. These new arrivals pathways, which are different from the departures pathways, will make it possible to improve how journeys to and from the station are managed while limiting transloading (switching from one mode of transport to another, which is costly in terms of time and quality of experience).

Then, a train/plane connections building will be created between the CDG2 train station and Terminal 2E. This new development will deliver the best passenger journey from the train station to the check-in areas of Terminal 2E.

Beyond 2035 and until 2050, the airport's long-term development will be carried out gradually, in phases.

It will be strictly correlated to observed growth in traffic at the hub. The preferred option at present is to create additional international boarding lounges in the north of the hub, each with a capacity of 8 million passengers. They could be delivered all at once or as half-boarding lounges with a capacity of 4 million passengers, ensuring the most gradual progression possible in line with requirements.

The connecting metro network in the international area could then be extended to link all departure lounges, making the airport one of the most efficient in the world for passenger connections.



Testimonial from Anne Rigail, CEO of Air France

meets the needs of the Air
France hub and our Skyteam partners.
With coherent phasing to guarantee the flexibility required, it will bring improvements that are eagerly awaited by our customers, such as more contact boarding or the creation of an automatic metro to facilitate connections. In the context of intense competition between the various European and non-European hubs, it meets the competitiveness objectives of our main base, while furthering our ambitions in terms of intermodality and decarbonising our operations."

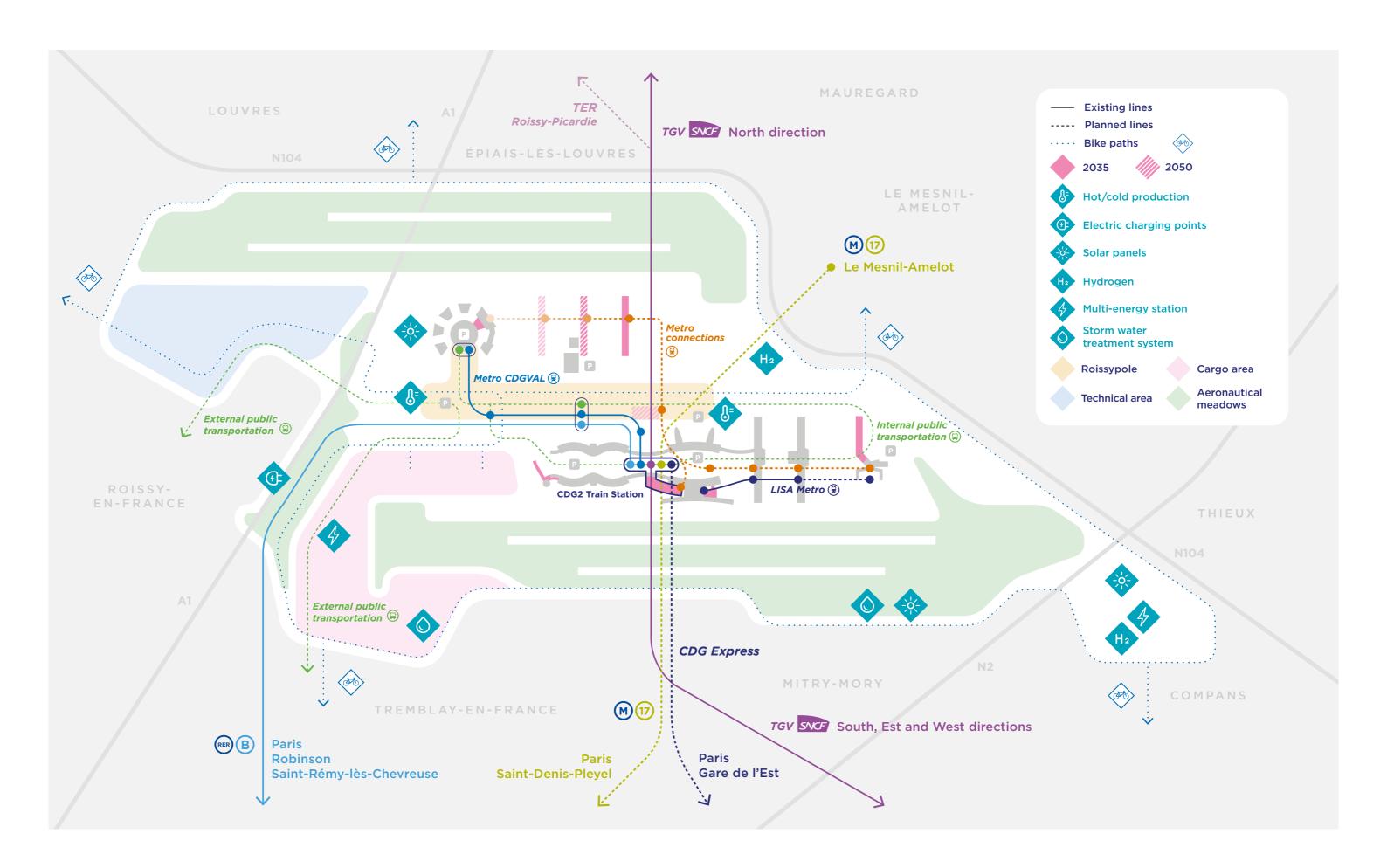
What if there were no new developments at all?

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By 2035, without new facilities, the 88 million passengers expected to use the airport would experience a much poorer quality of service, with a large number of flights allocated to remote stands, resulting in discomfort, much longer waiting times and degraded journeys for people with reduced mobility. Without new developments at the CDG2 SNCF train station, the airport would be unable to accommodate passengers arriving by train or metro. This would have a detrimental effect on the competitiveness of the airport, the Skyteam Hub and France as a whole.

In 2050, without new developments, the airport's passenger capacity would permanently stagnate at the 2035 level (88 million passengers per year), with no improvement to the customer experience. Passenger and freight traffic would then shift to our competitors who are less committed to the environmental transition, thereby transposing CO_2 emissions to other regions without eliminating them.





HOW WILL IMPACTS BE REDUCED?

Thanks primarily to airline fleet renewal, the use of sustainable aviation fuels and changes to vehicle fleets, the airport's noise pollution as well as its pollutant and greenhouse gas emissions will be significantly reduced⁵. This is a priority for Groupe ADP.

A significant reduction in noise levels 6:

- ♦ During the day (84,000 people affected in 2019): estimated reductions of 30% in 2035 and 54% in 2050
- ♦ At night (27,000 people affected in 2019): reductions of 32% in 2035 and 63% in 2050

Incidentally, the noise pollution issue is currently being examined as part of the balanced impact study (EIAE) being conducted by the Val d'Oise prefecture. The measures envisaged - particularly the operational measures - could result in a further reduction in noise pollution.

A substantial fall in greenhouse gas emissions and improved air quality

From 2035,

a 40% reduction in fine particle **emissions** (PM10: -43% and PM2.5: -52%) would be observed. Total greenhouse gas emissions are expected to fall by 22% compared with 2019.

In 2050.

these improvements will be magnified, with further significant reductions in all pollutants, with greenhouse gas emissions 85% lower than in 2019, confirming Paris-Charles

⁵ For all measures, the year with the greatest impact was taken as the reference value. The forecasts have been developed in line with the decarbonisation trajectories of the aviation sector. The modelling was supervised by the Groupe ADP laboratory, which carries out the various regulatory inspections related to our activities.

de Gaulle's environmental ambitions.

opportunity for residents, local authorities and all local stakeholders to contribute to the changes introduced at this key facility, which is a real gateway to the world. I welcome this initiative by Groupe ADP, which will enable the Roissy

Pays de France conurbation to be involved in the future of the airport, which represents a real local economic asset that is vital to our region."

The consultation on the future development

of Paris-Charles de Gaulle airport is an

WHAT VALUE CREATION IS AT STAKE?

Developments that support the airport's job creation momentum as well as its value creation

Supporting the country's economy

Over the coming years, traffic at Paris-Charles de Gaulle will become increasingly international, providing an opportunity to create greater value for the country while irrigating its economic and employment fabric.

It has been noted that spending by international **visitors** is higher than that of visitors from the Schengen Area.

Spending by air travellers could thus more than double between 2022 and 2050, rising from €6 billion to €12 billion, with 90% remaining in the Île-de-France region.

Testimonial from Pascal Doll, Chairman of the Roissy Pays de France **Conurbation Committee**



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Jobs for the region and its inhabitants

Between now and 2035.

nearly 10,000 jobs will be created and 30,000 new positions could be filled, because almost 30% of the hub's employees are over 55 and will soon be retiring.

Bv 2050.

forecasts indicate that around 20,000 additional jobs could be created compared with 2035.

Beyond the numbers, the jobs forecast are also increasingly diverse: digitalisation, IT systems, industrial maintenance, new energies, etc.

The appeal and quality of jobs at the airport

The development of mobility options for

travelling to and from the airport will facilitate access to jobs and break down barriers to employment. In fact, 70% of people refuse a job because they lack a viable travel solution.

A 'neighbourhood' approach will be implemented when developing the various business parks and employment zones to encourage quality of life at work, keeping them small, with services and a pleasant environment on offer.

⁶ Two indicators track populations exposed to noise pollution: populations subject to high annoyance during the day or high sleep disturbance during the night. Daytime noise levels range from 55 dB(A) to 75 dB(A); at night, the scale ranges from 50 dB(A) (low annoyance) to 70 dB(A) (high annoyance).

HOW DO SOBRIETY AND RAIL CONNECTIONS PERMEATE THE ENTIRE PROJECT?

These two principles have been used to define the development vision for the airport around the following five focus areas.

FOCUS AREA 1

A major multimodal train station to serve the region

The context

- Today, almost 67% of passengers and 90% of employees travel to and from the airport by car.
- New transport connections are expected in the coming years (see boxed text below).
- ◆ Train station traffic could double by 2030, and triple by 2050, rising from

nearly 15 million passengers today to nearly 30 million, then 45 million, more than half of whom will be train passengers arriving or departing on short-distance journeys.

Testimonial from
Florent Bardon, Director of
the Paris Gare du Nord and
CDG2 TGV train stations and
of SNCF Stations & Connections



transformed to meet the major changes in passenger traffic expected at the CDG2 TGV train station over the next few years. Close collaboration between the SNCF and Groupe ADP teams has already been initiated, notably for the CDG Express and the 2024 Olympic and Paralympic Games. This will enable us to work together to meet the challenges inherent to developing intermodality at Paris-Charles de Gaulle."

Major changes in the rail and public transport options on offer in the years to come

- ♦ In early 2027, the CDG Express will link the airport directly to Paris from the Gare de l'Est train station in 20 minutes.
- ◇ By 2030, line 17 of the Grand Paris Express will provide a 35-minute link with La Défense and a 33-minute link to Saint-Lazare train station, with a change at Saint-Denis-Pleyel.

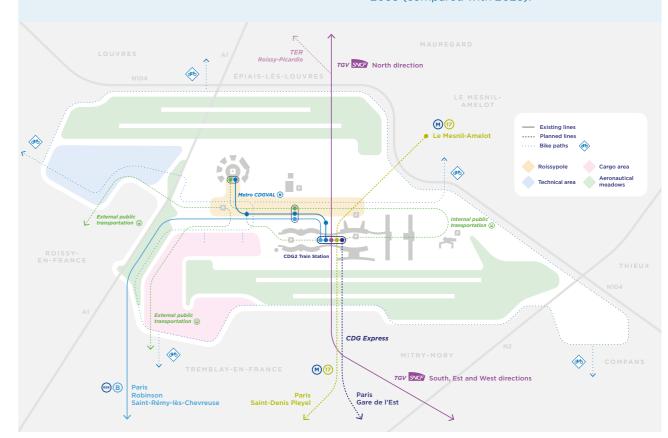
◇ In 2030, the 3 new bus links offering a high level of service in the Greater Roissy area – a project being managed by the Val-d'Oise department – will improve local transport links (two of these lines will run to Roissypole).

Furthermore, Groupe ADP is preparing to welcome line 19 of the Grand Paris Express, if its opening is confirmed, which would link the La Défense hub to the airport via Val-d'Oise.

In addition to public transport services, the reinforcement of cycle paths will link the capital to Paris-Charles de Gaulle and will thus facilitate access for employees, travelling mainly from the closest towns. From 2025, 8 km of cycle paths created by Groupe ADP will be commissioned, linking the south of the cargo zone to Roissypôle.

THE OBJECTIVES

- ◆ To move beyond a vision focused purely on aviation by embracing the major role of rail, not only as a means of accessing the hub but also for connections where possible.
- ◆ To develop and promote all forms of shared mobility for passengers, employees and residents of neighbouring areas.
- And, by extension, to ensure we have the capacity to accommodate passengers, employees and local residents arriving by train or public transport, and to facilitate transfers between trains/planes or within the hub.
- ◆ To double the proportion of passengers travelling to the airport by public transport by 2035 (compared with 2023).



Mobility in public areas. Source: Groupe ADP



FOCUS AREA 2

Phased and modular developments

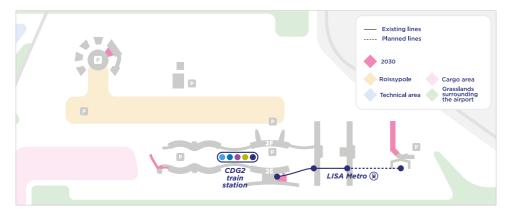
THE CONTEXT

- ♦ The airport can grow and develop without building new runways or extending existing ones.
- ♦ The 9 terminals at Paris-Charles de Gaulle are spread out, and this complicates their use by passengers, their operation and the connections between them.

THE OBJECTIVES

- ◆ To reinforce the CDG2 train station and position it as the epicentre of the airport, today and for future developments.
- ◆ To enhance existing terminals through renovation, redeployment and by leveraging technology, such as artificial intelligence, to maximise performance before creating new capacity.
- ◆ To ensure better rail connections between the terminals with both a metro in the public area and another in the restricted area (after border control), with a particular focus on transfers.
- ◆ To implement our low-carbon construction policy using processes and materials that emit less carbon.

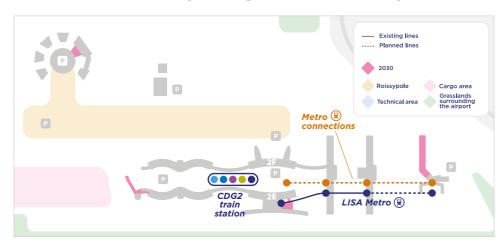
Vision for 2030 - Improving service quality in the short term



- Connecting existing aircraft stands.
- Redesigning the main border crossing areas in Terminals 1 and 2E.

Source: Groupe ADP

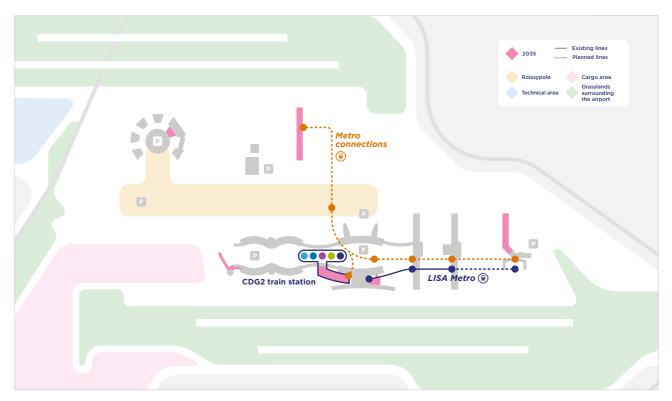
Vision for 2032 - Improving the transfers experience



 Developing better connections between the hub's boarding lounges.

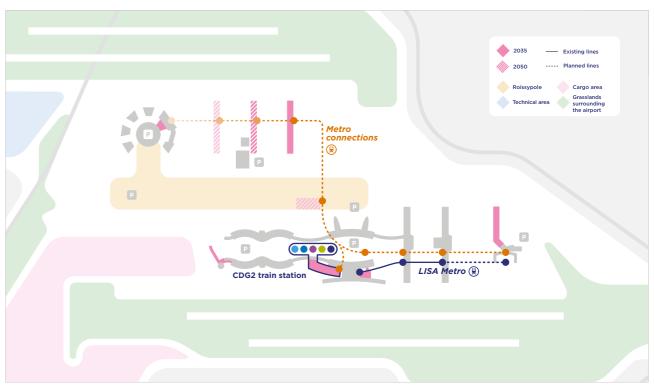
Source: Groupe ADP

Vision for 2035 - Expanding our capacity to receive train passengers and building a first boarding lounge in the north of the airport



Source: Groupe ADP

Vision for 2050 - Gradually creating new boarding lounges in line with traffic growth



Source: Groupe ADP

FOCUS AREA 3

Optimising freight activities

THE CONTEXT

♦ The freight tonnage transported, which amounted to 1.9 million tonnes in 2024, could almost double by 2050, not because the number of cargo flights will double but because airlines are carrying more freight on longhaul passenger flights.

Optimising the use of existing freight areas: projects already underway

◆ A two-storey freight station, known as DUO, will open in 2026 and operate over an area of 47,000 m², with a 28,300 m² freight station on the ground floor and 18,500 m² of office space on the upper floor.

THE OBJECTIVES

- ♦ To redevelop the cargo area in an effort to optimise the use of existing surface areas rather than to simply extend over more land. Building new business parks or freight stations upwards will notably enable this.
- **♦** To mechanise and automate freight processing: the aim is to enhance processing efficiency from the current 5 to 6 tonnes per m² of floor area per year, to 8 to 10 tonnes per m² per year.
- ◆ From 2029, the freight station known as Sodexi, made up of old, obsolete buildings and named after the historic occupier, will be gradually demolished and rebuilt as a 17,000 m²freight station with higher ceilings for handling larger volumes.



FOCUS AREA 4

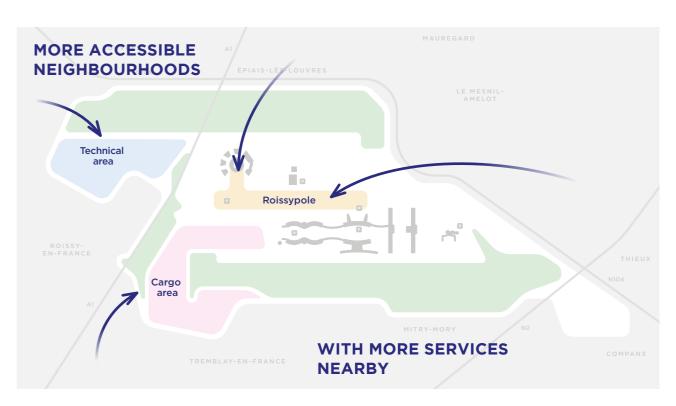
Sustainable real estate for quality of life and employment

THE CONTEXT

♦ The hospitality and quality of life of airport users need to be improved.

THE OBJECTIVES

- ◆ To help to improve the quality of life at work for employees and the attractiveness of jobs at the airport by developing small-scale 'neighbourhoods'.
- ◆ Everyone should be able to find the day-to-day services they need, as well as places where they can socialise and relax
- ◆ Three areas have currently been identified: Roissypole, the cargo area and the technical area.
- ◆ To continue to optimise the hotel and service offering to support aeronautical operations.



The 3 '20 minute' neighbourhoods. Source: Groupe ADP

FOCUS AREA 5

A low-carbon energy hub

THE CONTEXT

♦ In order to meet the sector's carbon neutrality targets by 2050, with the first milestone for airport emissions in 2035, there is a growing need for low-carbon energy.

THE OBJECTIVES

To develop renewable energy production and distribution capacity (geothermal, solar):

- ◆ For electric and greener ground operations: reinforcement of the electricity network by 2035, introduction of charging stations, installation of new solar panels at the airport (ground-level car parks and power stations), increase in the supply of low-carbon biofuel and hydrogen.
- ◆ For renewable heat: the commissioning of a geothermal well (or another renewable heat production facility) to complement the first geothermal well, which will begin operating in 2026.

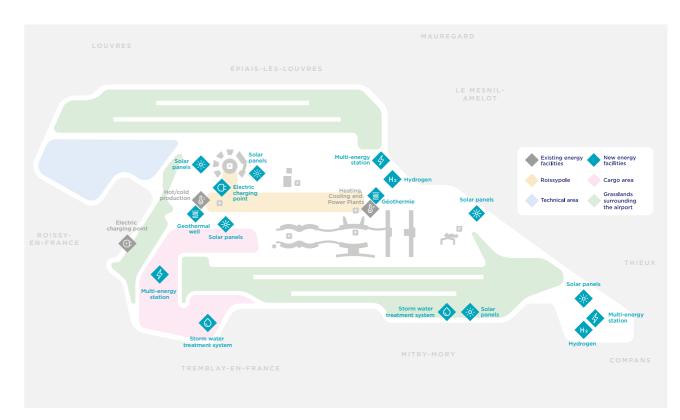
- ◆ For hydrogen aircraft: reservation of 30 hectares of land for housing a hydrogen liquefaction and storage plant after 2035.
- For sustainable aviation fuel: our existing pipeline facilities, which are connected to the airport, are already ready for a ramp-up in the use of these fuels.

The details governing renewable energy production will take not only the needs of the airport into account, but also the additional needs identified by neighbouring areas, which is one of the key objectives of the consultation.

Safeguarding biodiversity

The development vision includes:

- the protection of biodiversity areas on at least 25% of the airport's surface area, i.e. bigger than the Bois de Boulogne park.
- ecological continuity with other areas, by contributing to biodiversity corridors that protect the movements of wildlife.
- the rewilding of artificial areas, urban gardens, new woodlands, etc.



Source: Groupe ADP

WHAT IS THE PUBLIC CONSULTATION PROCESS 'CDG & VOUS'?

Entering into dialogue with local stakeholders is a priority for Groupe ADP, hence the decision to launch a voluntary public consultation process on this vision in a wider scope involving almost 800 municipalities spread over 9 French departments.

This consultation is being organised with the support of an advisory committee from the French National Commission for Public Debate (CNDP).

The meetings and workshops will be held on and around the airport from 8 April to 8 July 2025.

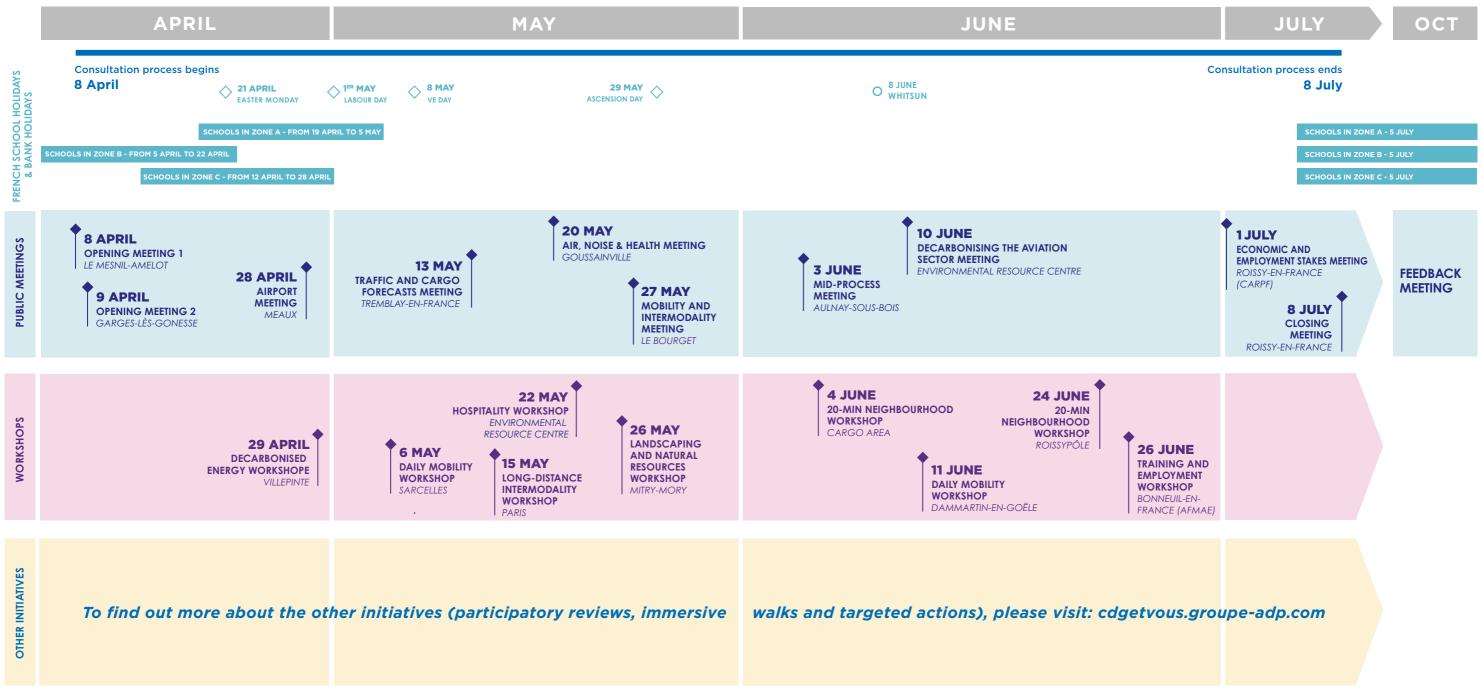
The consultation process is structured into different meeting phases and various forums for discussion will be rolled out:

- 4 opening and closing public meetings;
- 6 themed meetings;
- 9 participatory workshops;
- 20 participatory reviews.

Full details of the meeting schedule are available on the website: www.cdgetvous.groupe-adp.com.

CONSULTATION PROCESS SCHEDULE

FROM 8 APRIL TO 8 JULY 2025



Dates and locations are subject to change.

To find out about our meetings, locations and times and to register to participate, please visit: cdgetvous.groupe-adp.com



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Various means of staying informed and making a contribution

are planned for all parties:



on the website, in the 'take part online' section: www.cdgetvous.groupe-adp.com



on the register kept at the Paris-Charles de Gaulle Environmental Resource Centre (rue Louis-Couhé, 93290 Tremblay-en-France, open Tuesday to Friday, from 8.30 am to 4.30 pm);



via the stakeholder guide for organisations (website)



by posting back the prepaid slip from the leaflet that was sent to all households in 199 municipalities.



