

nextstation
PARIS 2007

6 & 7 décembre 2007

2^{ÈME} CONFÉRENCE INTERNATIONALE
SUR LES GARES FERROVIAIRES



Next Station

*2^{ème} conférence internationale
sur les gares ferroviaires*



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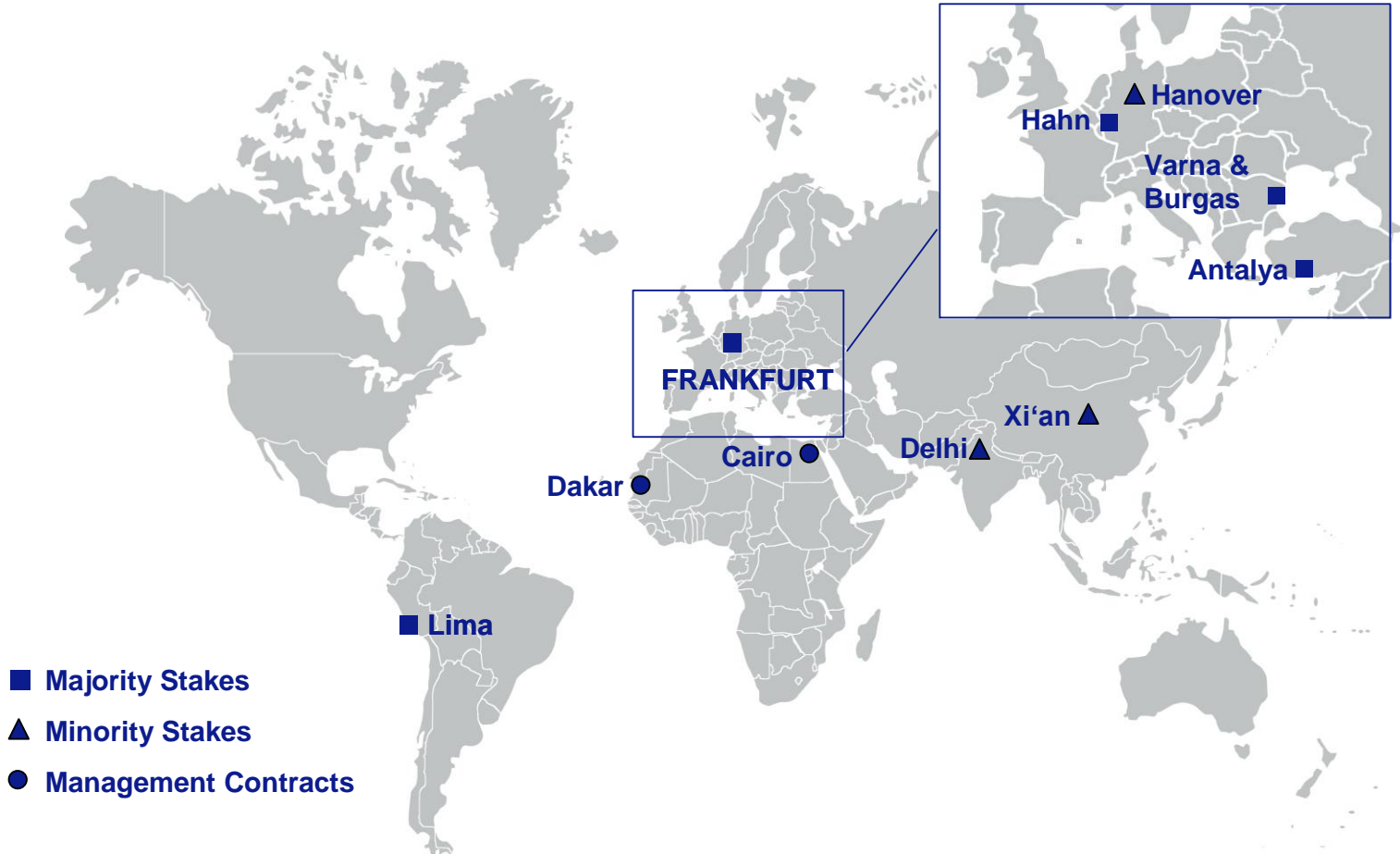
Airport business, a reference?

*Dr. Pierre Dominique Prümm
VP Corporate Strategy
Fraport AG*



Who is Fraport?

Fraport is today one of the leading Airport Operators Worldwide



Our Core Asset: Frankfurt Airport

	<i>Passengers Europe Mio.</i>	<i>Cargo Europe Mio. t *</i>	<i>Passengers World Mio.</i>	<i>Cargo World Mio. t *</i>
① London-Heathrow	67,5	Frankfurt 2,13	Atlanta	84,8
② Paris-Ch.d.Gaulle	56,8	Paris-Ch.d.Gaulle** 1,85	Chicago	76,2
③ Frankfurt	52,8	Amsterdam 1,56	London-Heathrow	67,5
④ Amsterdam	46,1	London-Heathrow 1,34	Tokio-Haneda	65,2
⑤ Madrid	45,5	Luxemburg 0,75	Los Angeles	61,0
⑥ London-Gatwick	34,2	Brüssel 0,69	Dallas	60,1
⑦ München	30,8	Köln 0,69	Paris-Ch.d.Gaulle	56,8
⑧ Rom	30,1	Mailand 0,42	Frankfurt	52,8
⑨ Barcelona	30,0	Belgien – Liege 0,41	Peking	48,5
⑩ Paris Orly	25,6	Madrid 0,35	Denver	47,3
			Memphis	3,69
			Hongkong	3,61
			Anchorage	2,80
			Seoul	2,34
			Tokio-Narita	2,28
			Shanghai	2,16
			Louisville	1,98
			Singapur	1,93
			Los Angeles	1,91

* Cargo and Air Mail according ACI

** w/o Air Mail

Source: ACI



Stations and Airports – Hubs for Travellers on different levels



Frankfurt Airport

160.000

Pax per day

45 min.

MCT

28.500

Car Parks

15.000

Retail (sqm)



Frankfurt Hbf

350.000

Pax per day

3 min.

MCT

1.135

Car Parks

9.000

Retail (sqm)



Lessons learned from Airports – Potential Areas

- **Business Model**
- **Retail & Property Development**
- **Sustainability**



Business Model of Frankfurt Airport – Dual Till Approach

Aviation Infrastructure Use

- Runway, Apron, Terminal (Aviation Part)
(Landing, parking, passenger and security fees)
- Central infrastructure
(Runway lighting, baggage handling systems,
de-icing systems)

Regulated

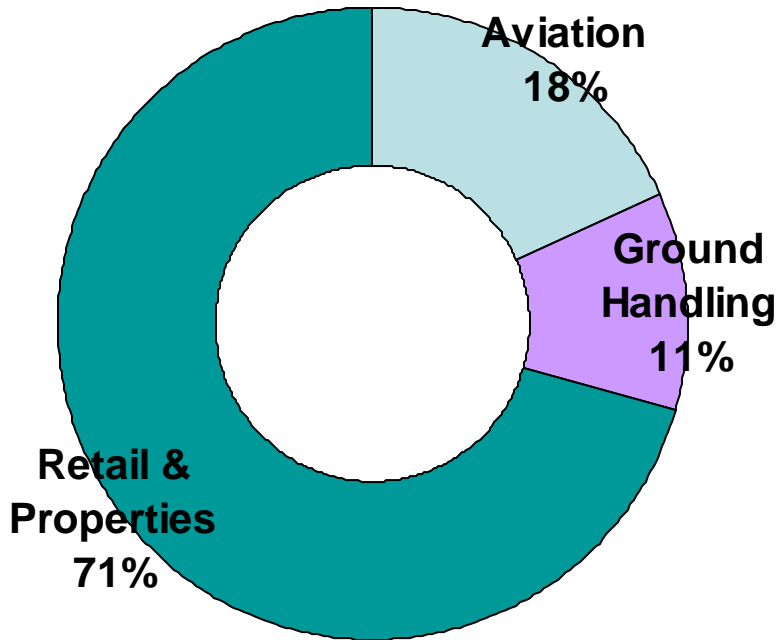
Non-Regulated

- Retail
- Parking
- Ground Handling Services
- Real Estate



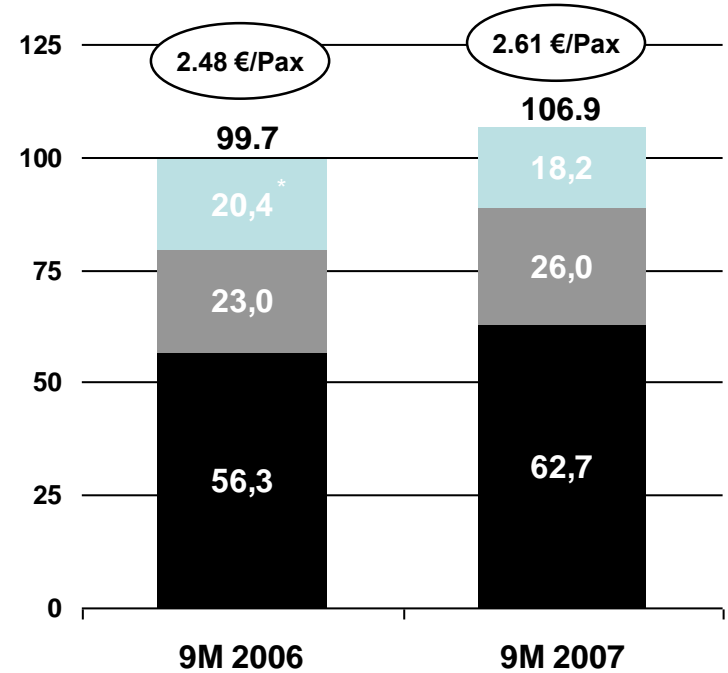
Retail & Properties – Results are essential for the airport

EBIT-Share FY 2006
Frankfurt Airport



Retail Concessions 9M 2007
per Passenger

Target 2009: € 3/PAX - 2012: € 4/PAX



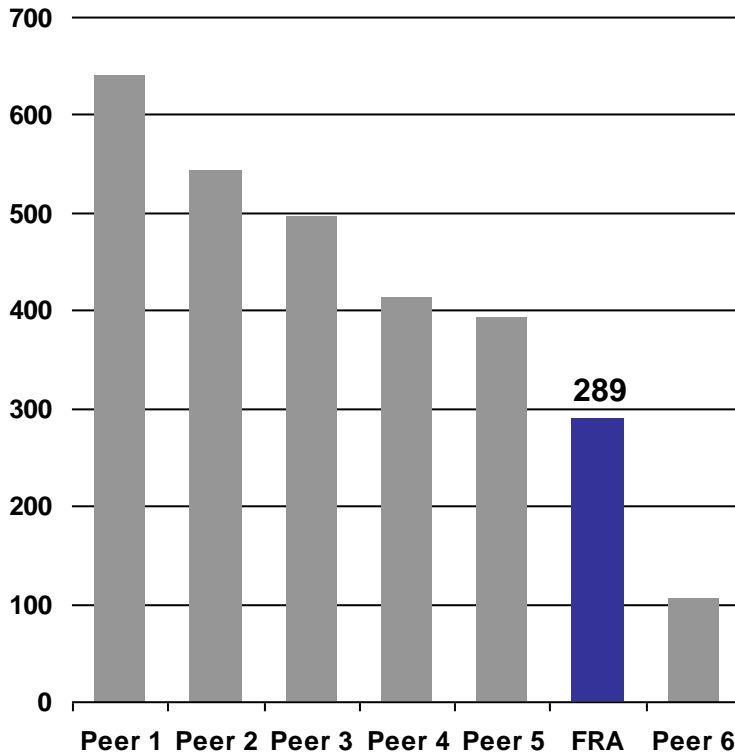
■ Retail ■ Services ■ Advertizing

* Including World Cup special effect of € 3.1 mil. in 2006

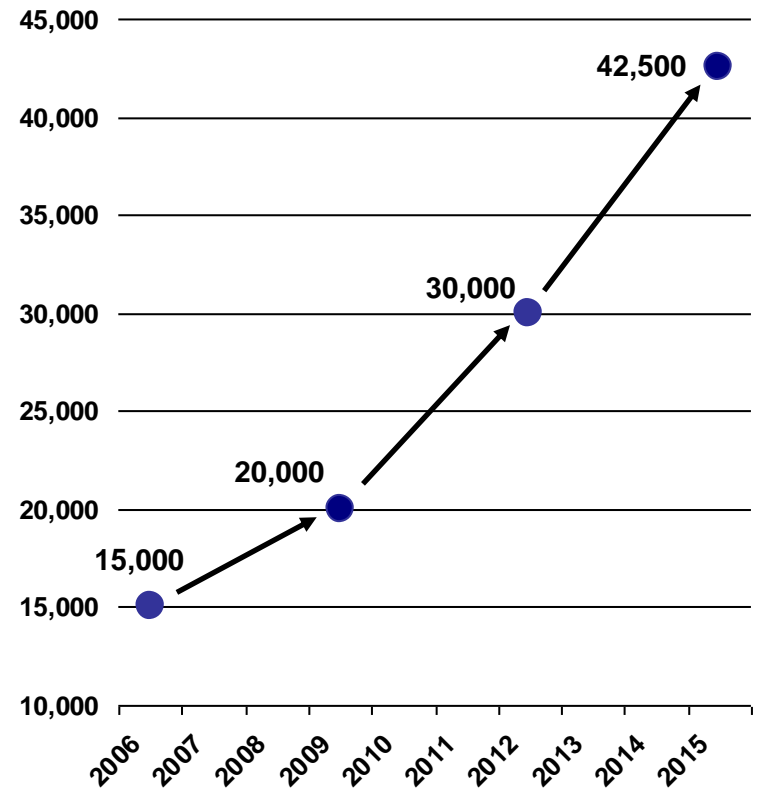


Compared with European Peers, FRA has huge Potential in Retail Space

Shopping space (airside only) per 1 million departing Passenger (sqm)



Shopping Space Frankfurt, Terminals 1, 2 & 3 sqm (exp.)

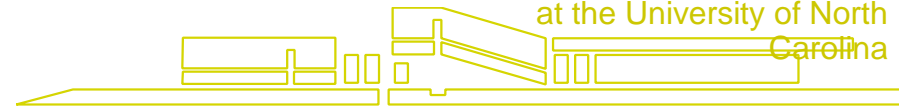


Property Development - Our vision: Airport City



■ "Airports are becoming like downtowns, and terminal concourses their Main Streets where people shop, eat and work. They're influencing society and culture the same way that cities have."

■ John Kasarda,
Director of the Kenan
Institute of Private Enterprise
at the University of North
Carolina



Sustainability issues of Airports

How can benefits and disadvantages be balanced?

Economic Sustainability of Air Travel has to be explained

- **Availability of Air Travel supports economic growth¹⁾**
- **Airports create jobs²⁾**
- **Airports promote trade and industry²⁾**

Environmental issues have to be optimised

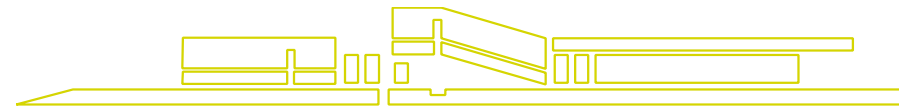
- **For future growth a credible reduction in aircraft noise (active and passive) is essential³⁾**
- **Active measures against noise emissions and air pollution have to be implemented⁴⁾**
- **Support and influence initiatives to reduce airplane emissions**

Corporate Responsibility has to be taken seriously - be a good neighbour

- **Comprehensive information and communication is a key factor**
- **Voluntarily compensation schemes could smooth that weighed**
- **Promote the region (culture, sports, nature, social initiatives), gain acceptance**

- 1) ACI, Building for the future. The ACI estimates, that „failure to provide the airport capacity needed in the future could cost between 2.5% and 3% of national or regional GDP respectively.“
- 2) ACI: 3,000 new jobs for every million air passengers. Large Airports are seen as a national economic motor and serves as a „strategic factor“ for the region.
- 3) Incentives for noise optimised airplanes, technical innovation (optimised arrival- and departure routes, zoning laws, sound proofing, compensation payments to residents under certain circumstances) and adequate capacity reserves.
- 4) Construction of noise barriers, eg.: sound-proof walls and buildings, shielding of aircraft engine tests, emission free/reduced ground vehicles, stationary power supplies, further: establishment of a noise monitoring systems, noise information telephones and other initiatives.

Thank you for your attention!



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