

Intermodal Hub Frankfurt Airport

Frankfurt am Main 12th of November 2013

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Commissioner for Intermodality*



Frankfurt am Main Airport

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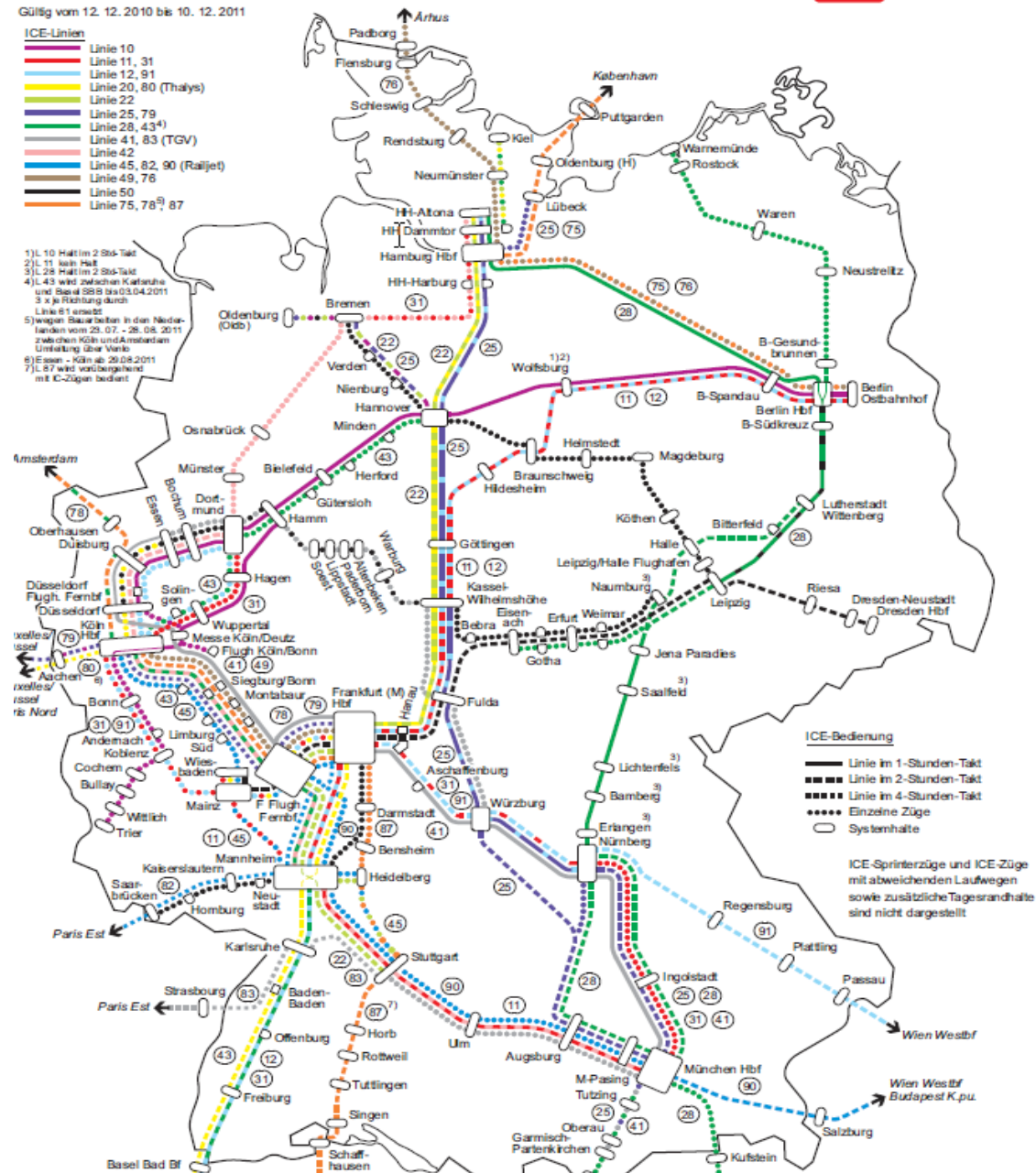
ICE-Netz 2011

Gültig vom 12. 12. 2010 bis 10. 12. 2011

ICE-Linien

- Linie 10
- Linie 11, 31
- Linie 12, 91
- Linie 20, 80 (Thalys)
- Linie 22
- Linie 25, 79
- Linie 28, 43⁴⁾
- Linie 41, 83 (TGV)
- Linie 42
- Linie 45, 82, 90 (Railjet)
- Linie 49, 76
- Linie 50
- Linie 75, 78⁵⁾ 87

- 1) L 10 Halbtim 2 Std-Takt
- 2) L 11 kein Halt
- 3) L 28 Halbtim 2 Std-Takt
- 4) L 43 wird zwischen Karlsruhe und Basel 39.8 bis 03.04.2011 3 x je Richtung durch
- Linie 61 ersetzt
- 5) wegen Bauarbeiten in den Niederlanden vom 27. 07. - 28. 08. 2011
- zwischen Köln und Amsterdam Umleitung über Venlo
- 6) Essen - Köln ab 20.08.2011
- 7) L 87 wird vorübergehend mit IC-Zügen bedient

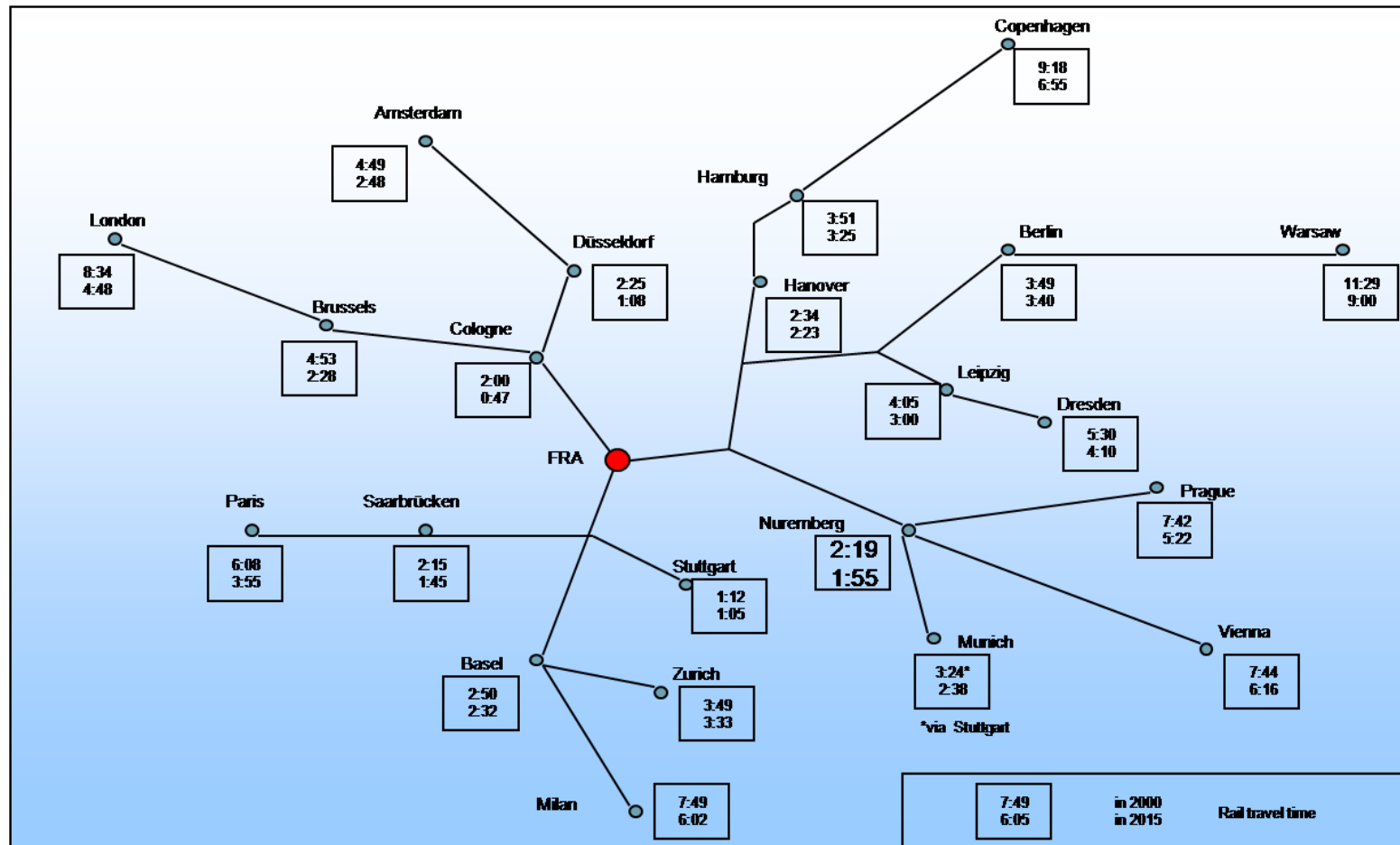


1. Intermodal Strategy

Central Location

1. FRA's Strategic Position

- The Rail Net: Good Connectivity into all Directions



1. Intermodal Strategy

Strategic Objectives of Intermodality

High Speed Traffic (Long distance trains):

1. Strengthen FRA's **hub function**:
 - by developing German Rail as a feeder to FRA
2. Compete (hub-) airports and airline alliances
 - by enhancing FRA's **catchment area**
3. Enlarge **slot capacity**
 - by shifting feeder flights to train

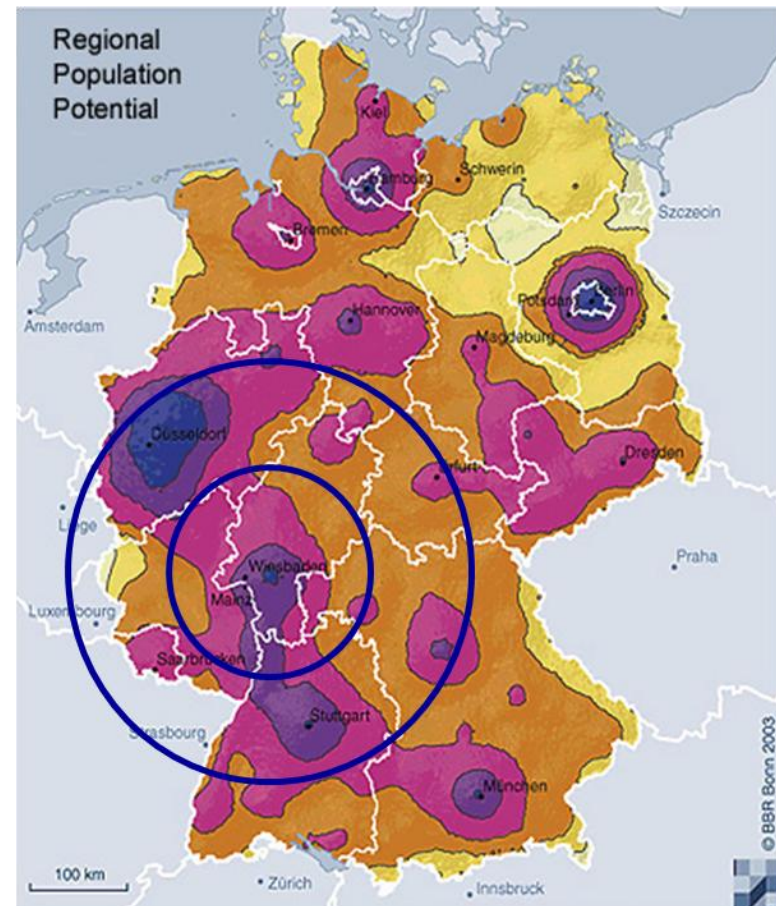
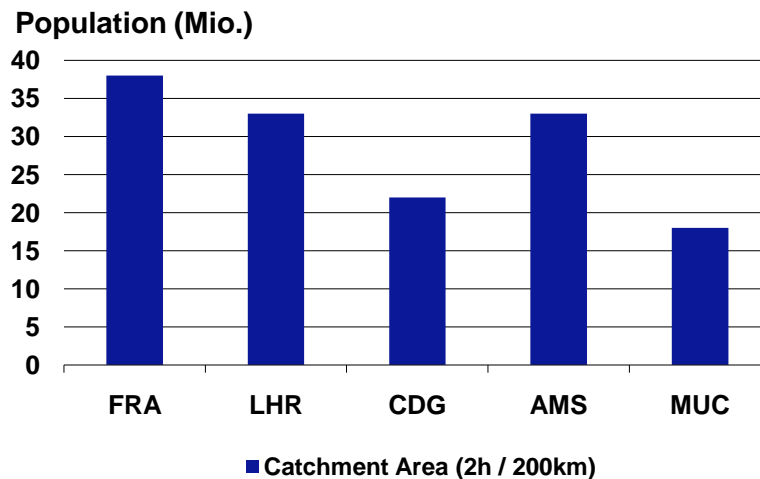
Long distance and regional trains/busses:

4. Develop **best practice** and **reliable services**
 - by ensuring accessibility to FRA& by developing intermodal services
5. Contribute to **environment** protection/carbon emission
 - by shifting traffic to public modes

1. FRA's Strategic Position - Big Passenger Potential (dependent on land use patterns, population volumes and rail distances)

Within a radius of 200 km around the airport, FRA has a larger population potential even than other European hubs!

Intermodal Hubs in Europe



Source: Area Observation of the BBR

2. Intermodal Products and Services

History of Product and Service Development at FRA

1st Phase: Commuter & long distance trains

1972	Regional train station
1985	Long distance intercity trains
1982-1993	LH Airport Express

2nd Phase: High speed trains

1999	High speed train station
2003	High Speed Line Cologne-Rhine-Main
2004	New train schedule of German Rail

Intermodal Services

2000/2007	FRA's AIRail Terminal
2001/2003/2007	LH's AIRail Service Stuttgart/Cologne/Bonn-Siegburg, Codesharing LH-DB

Sales (German Rail)

since 1992	DB's Rail&Fly - Ticketing for Airlines
2003/.../2007	Code sharing - Agreements DB with AA, ANA, CI, QF, TP

2. Intermodal Products and Services

Overview



– High Speed Train Station

174 trains per day in 2012

5.6 Mio. Pax in 2012

– Regional train station

223 commuter trains per day (2012), thereof 40 regional trains

3.5 Mio. Pax in 2012



– AIRail Terminal

- Common Check-in (42 Airlines, handled by LH and by Fraport): MCT 45 min, 11.000 Pax per month
- AIRail Service: MCT 60 min

Source: Fraport

2. Intermodal Products and Services

THE SQUAIRE: An architectural milestone with far-reaching impact



Intermodality at Frankfurt Airport, D

2. Intermodal Products

THE SQUAIRE – Facts and Figures



Length 660 m
Height 45 m (9 Levels)
Width 65 m
Weight 350.000 tonnes
Total floor area 200.000 m²
Total rental space 143.000 m²

Office space	94.500 m ²
Retail & catering trades	5.900 m ²
Hotels	34.500 m ²
Public Parking Positions	3100
Atria	13.000 m ²
Total investment	app. One billion euros

2. Intermodal Products

THE SQUAIRE – Range of Services

Overnight stay and relax

Hilton Frankfurt Airport
Hilton Garden Inn
Wellness
Fitness

Service Providers

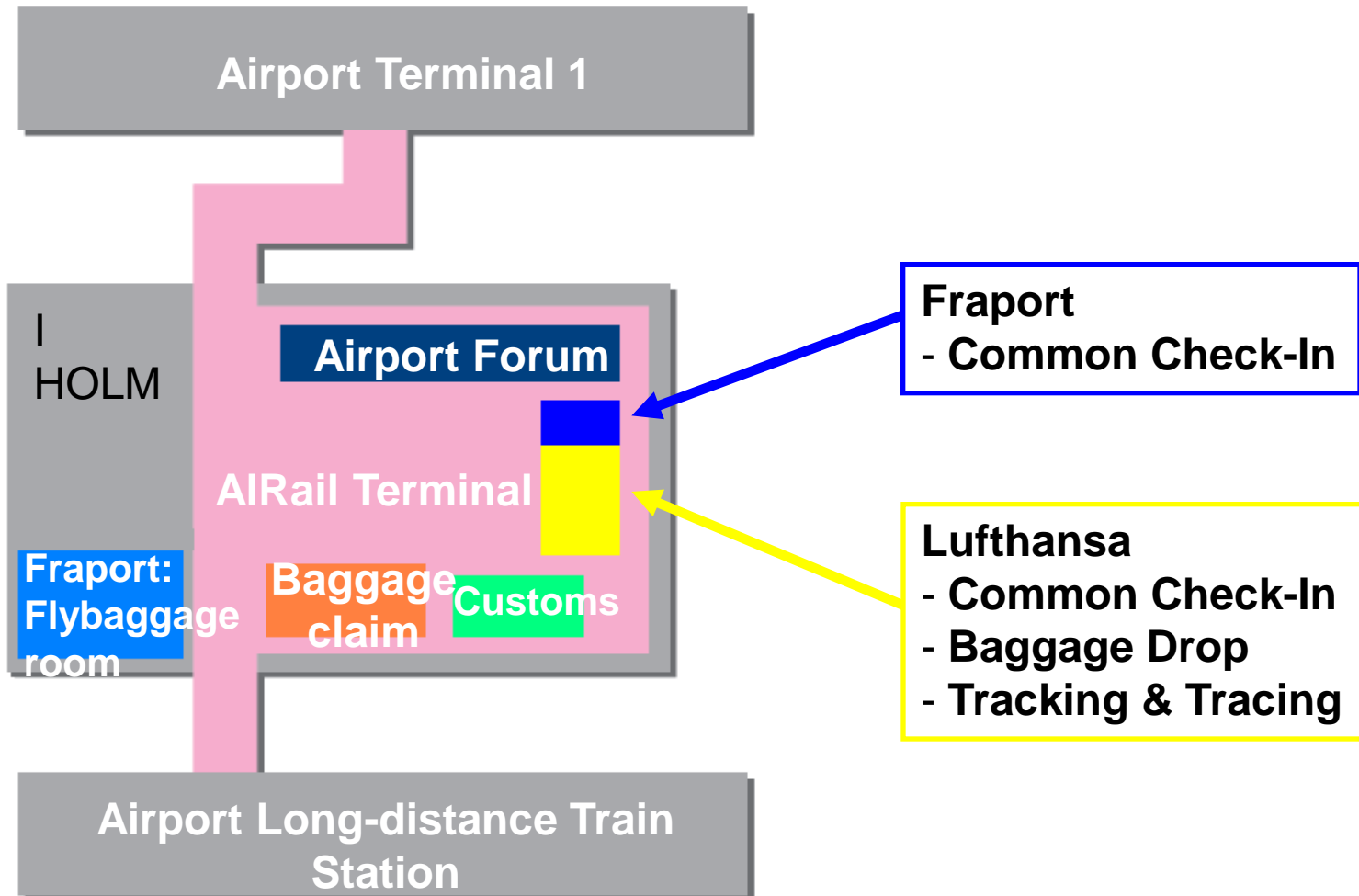
Doctors
Day-care Centre
Concierge
Barber
Dry-cleaners
Bank house
Business- and
Conference Center
Supermarket
Drugstore
Jeweler
Perfumery



Catering

10 Full-Service
Restaurants
5 Cafés & Take Away

2. Intermodal Products and Services The AIRail Terminal



2. Intermodal Products and Services

AIRail Check-in for 42 Airlines:

Lufthansa Passenger Service, check-in for LH and 21 partner airlines:

Air Moldova
China Eastern Airlines
Croatia Airlines
Cyprus Airways
Egypt Air
Kuwait Airways
LOT Polish Airlines
Luxair

MEA Middle East Airlines
SAS Scandinavian Airlines
Spanair
SunExpress
SWISS International Airlines
TAP Portugal
Tarom
Vietnam Airlines

SunExpress Deutschland
Rossavia
Air Algerie
Aegean Airlines
Adria Airways

Fraport Passenger Service, check-in for 21 airline partners:

Air Lingus
Air Berlin
Asiana Airlines
Belavia
China Airlines
Condor
Emirates
Ethihad Airways

Gulf Air
Korean Air
Malaysia Airlines
Niki Luftfahrt GmbH
Oman Air
Pakistan International Airlines
Qatar Airways
SATA International

Sri Lankan Airlines
STC Russia
Thai Airways International
Transaero Airlines
Yemenia Yemen Airways

2. Intermodal Products and Services

Rail & Fly Agreements **DB** and Tour Operators

Rail&Fly - Unsere Partner-Reiseveranstalter

<ul style="list-style-type: none"> • 1-2-Fly • 5 vor Flug • AIDA Kreuzfahrten • Airtours • Aldiana • Alltours • ATT Touristik • Attika Reisen • Berge & Meer • BigXtra • Bucher Reisen • BUND Naturschutz • Clevertours • Club Méditerranée • Clubreisen Stumböck • DERTOUR • Dokan Air • Dr. Koch Reisen • Dynares! UG • ECC Studienreisen • Ecco-Reisen GmbH • ETI Express Travel Int. • Fox Tours • F T I • FTS Fly & Travel Service GmbH • GeBeCo / Tigges • GBFR Reisen • Hanseat Reisen • H&H TUR Touristik • Hermes Touristik • Holiday & Co. • ITS Reisen • ITC International Travel Concept • Jahn Reisen • Kopp Tours 	<ul style="list-style-type: none"> • Leiserowitz Reiseagentur GmbH • Lernidee Erlebnisreisen • L'TUR • Linzgau Reisebüro Pfullendorf • Marco Polo Reisen • Maritim Hotel-Reisedienst GmbH • Medico Weltreisen • Mediplus • Meier's Weltreisen • Miller-Reisen • MISR Travel Aegyptische AG • MSC Kreuzfahrten • Neckermann Reisen • New 2 go • OFT Reisen • Öger Tours • Pep Express • Phoenix Reisen • Pul Express GmbH • Reisekultouren • Schauinsland-Reisen GmbH • Sprachcaffe Reisen • Studien Kontakt Reisen • Studiosus Reisen • Team Fernreisen GmbH • Thomas Cook Reisen • Tjaereborg • Tour Vital • TUI • Urlaubshop GmbH • Vestischer Reisedienst • Wikinger Reisen • Wolters Reisen
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2. Intermodal Products and Services

Rail & Fly Agreements **DB** and Airlines

■ Aeroflot	■ Egyptair	■ Qatar Airways ▼
■ Aerosvit Ukrainian Airlines	■ El Al Israel Airlines	■ Rossiya Airlines
■ Air Astana	■ Emirates ▼	■ Royal Air Maroc
■ airberlin ▼	■ Ethiopian Airlines	■ Royal Jordanian Airlines
■ Air China	■ Etihad Airways	■ SATA Internacional
■ Air India	■ Finnair	■ Siberia S 7
■ Air Malta	■ Germanwings ▼	■ Singapore Airlines
■ Air Mauritius	■ Gulf Air	■ South African Airways ▼
■ Air Moldova	■ Hainan Airlines	■ SriLankan Airlines
■ Air Namibia	■ Iberia	■ Syrian Arab Airlines
■ Air Transat	■ Icelandair	■ TAM Linhas Aéreas
■ Alitalia	■ Iran Air	■ TAP Portugal
■ American Airlines ▼	■ Japan Airlines	■ Tarom
■ ANA	■ JAT Airways	■ Thai Airways
■ Asiana	■ Korean Air	■ Transaero
■ Belavia	■ Kuwait Airways	■ TUIfly.com ▼
■ Bulgaria Air	■ LAN Airlines	■ Tunisair
■ Cathay Pacific Airways	■ Mahan Air	■ Turkish Airlines
■ China Airlines	■ Malaysia Airlines	■ Ukraine International
■ China Eastern Airlines	■ MIAT Mongolian Airlines	■ US Airways
■ Condor ▼	■ Middle East Airlines	■ Uzbekistan Airways
■ Croatia Airlines	■ Oman Air	■ Vietnam Airlines
■ Cyprus Airways	■ Pakistan International	■ Yemenia
■ Deutsche Lufthansa ▼	■ QANTAS Airways ▼	

Rail&Fly Amsterdam:

- China Airlines



2. Intermodal Products and Services:

AIRail Service/Code Sharing LH-flight number for „Flight on Level Zero“



Zeit time	Über via	Nach destination	Gleis track
16:56 IC 7 0 7	Mannheim · Karlsruhe ·	Offenburg · Freiburg	
16:58 ICE 7 2 4	Mainz · Koblenz · Köln ·	Essen · Dortmund	5
17:03 ICE 8 2 9	Frankfurt (M) · Würzburg ·		7
17:05 EC 2	Mainz · Koblenz · Köln ·	Duisburg · Utrecht	4
17:20 LH 9 3 9 0	in Kooperation mit DB		
17:20 ICE 5 7 9	Mannheim ·		6
		Stuttgart	6
		Stuttgart	6

3. Market Effects

Market Share of HST-Passengers (Modal Split)

PAX in % from originating traffic (Modal Split)

1998	Modes of transport	1999	2000	2010	2012
50	Car	49	41	39	33
5	Car Rental	5	7	3	4
18	Taxi	18	17	17	19
5	Bus	5	7	4	2+4
14	Commuter train	13	11	13	14
7	Long distance train	6	7	2	22
--	High speed long distance train	3	8	20	
1	Other	2	2	2	2
100	Originating pax volume	100	100	100	100



Source: Fraport, Intraplan

3. Market Effects

Intermodal Traffic Figures



3. Market Effects

- Passenger Numbers 2011 at FRA's Railway Stations

	Abs.	2011	2011/2012 in %
1. ICE High Speed Train Station:	5,622 Mio.	5,604	0.3
2. Regional Train Station:	3,529 Mio.	3,404	3.7
3. Total:	9,151Mio.	9,008	1.6



Intermodality at Frankfurt Airport, Dr. Peter Pfragner, 2013

4. Effects on Carbon Emission: Results for 2020

1. Effects on Modal Split in FRA

Shift from car to train: Reduction of CO²: - 4.800 t per year

Shift from flight to train: Reduction of CO² : - 80.600 t per year

2. Effects on Catchment Area of FRA (balance between FRA and airports in Germany&neighbouring countries)

Reduction of CO²: - 89.500 t per year

3. Sum of Effects 2020 for FRA

Reduction of CO²: -174.900 t

Thank You for Your Attention!

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