Top Connectivity

Schiphol Group strives to continuously improve Amsterdam Airport Schiphol as a multimodal transport hub. Together with KLM, our biggest customer and home carrier, we are working on further strengthening the global network of flight connections. As regards accessibility by car and public transport, Schiphol is one of the best airports in Europe; together with the region, we are optimising accessibility and the infrastructure.

Destinations

317

Passengers

51 m

Cargo

1,5 m tonnes

## Master Plan: prepared for the future

Top Connectivity is the key phrase for Schiphol. Amsterdam Airport Schiphol must be optimally accessible, not only for air traffic, but also by road and public transport, with an extensive network of destinations and an appropriate infrastructure. Schiphol airport is one of the major European Mainports. It is also a main hub, an airport where a large proportion of the passengers transfer to connecting flights. Our aim is that Schiphol airport continues to be a Mainport and a hub in the future.

To maintain our strong position in the global aviation sector, expansion of our capacity is inevitable. At present, we are already approaching the limits of the capacity of the terminal, the piers and the aircraft stands on peak days. If this growth continues at the current rate, the situation will definitely get worse. It is expected that, over the next ten years, the number of passengers will increase by 25%. This is within the limit of 510,000 air transport movements as agreed by the parties in the Alders Platform. The higher number of passengers will further increase the pressure on our operations in the coming years. This will also be

noticeable to the passengers. When the capacity is, or seems to be, insufficient, quality will be rated lower. This is something that we are not willing to accept: we also guarantee capacity and quality in the future.

Furthermore, competing hubs in Europe and the Gulf states, such as Frankfurt and Dubai, are raising their profile. This is a second reason to keep up. These airports are investing large amounts in capacity and quality and form a growing threat to the competitive position of Mainport Schiphol.

In light of the above, we are collaborating with our partners on the preparation of a Master Plan for Schiphol that provides for expansion of the capacity and structural improvement of the quality of the terminals, piers and aircraft stands. Linked to this Master Plan is a long-term investment plan that encompasses various, often independent projects. This modular plan offers flexibility: we will realise infrastructure facilities as and where necessary. This careful planning should limit the financial impact of the investments on airport charges.
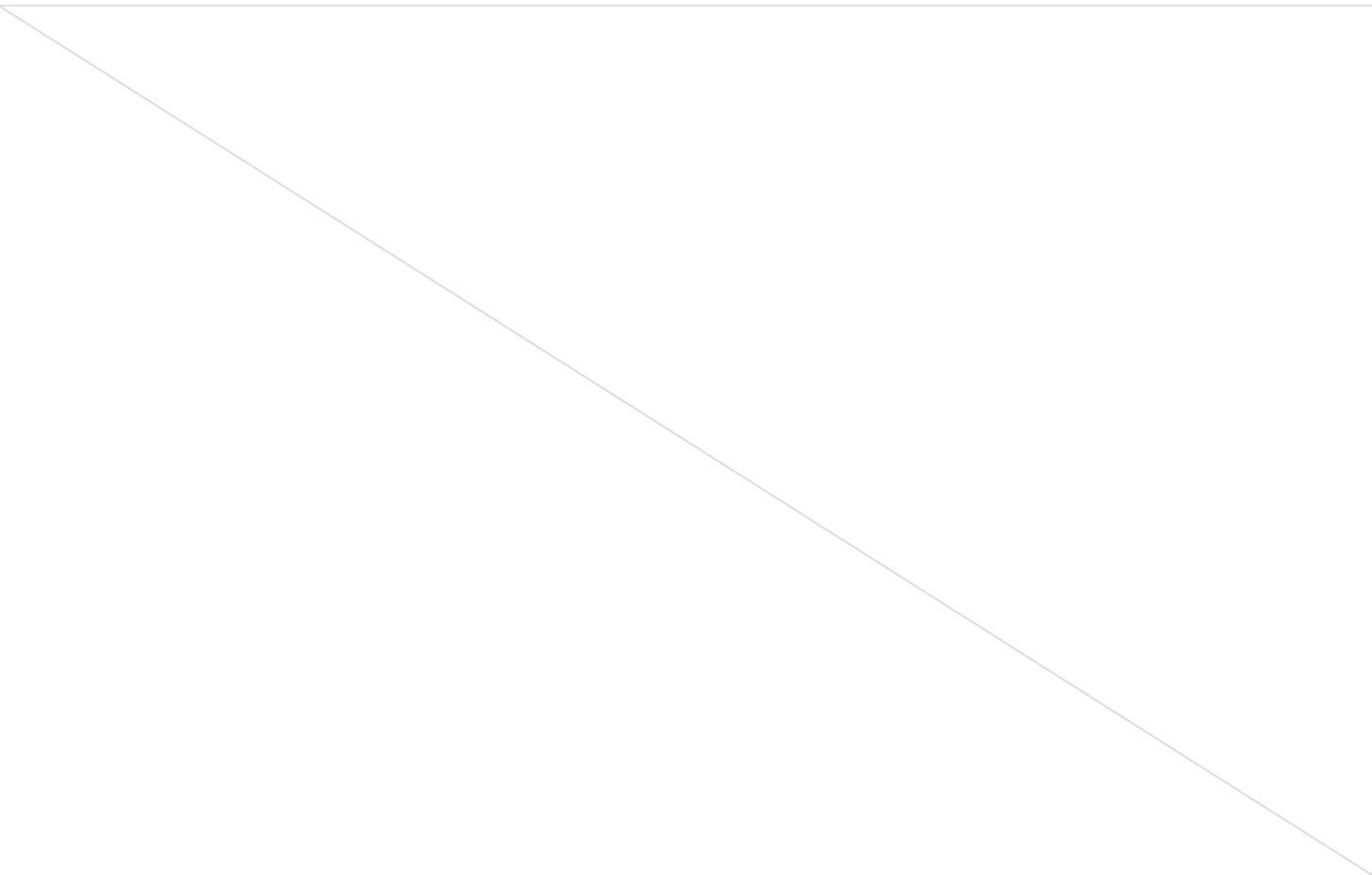
Central security control

In the meantime, we will not sit back and wait. A number of projects that address the changing situation have been started. A major reform that we are already working on is the central security concept in the non-Schengen area of the terminal. Security checks of passengers and hand luggage will take place at central security filters instead of at the gates. To create room for this process change, an additional floor will be constructed on a number of piers (E, F and G) and an existing floor will be redesigned to accommodate security control. Central security ultimately results in a far more efficient process, better use of the boarding lounge and gate capacity, more comfort for passengers and better future preparedness of business operations in light of new legislation and regulations in the area of security. Initial preparations started in 2013 and this extensive project is expected to be completed in 2015. The investment programme relating to this project amounts to approximately 350 million euros.

Runways

Name	Location	Length	Width
1 Polder Runway	18R - 36L	3,800 metres	60 metres
2 Zwanenburg Runway	18C - 36C	3,300 metres	45 metres
3 Kaag Runway	06 - 24	3,500 metres	45 metres
4 Aalsmeer Runway	18L - 36R	3,400 metres	45 metres
5 Buitenveldert Runway	09 - 27	3,453 metres	45 metres
6 Schiphol East Runway	04 - 22	2,014 metres	45 metres

Competitive position

Despite the adverse economic conditions worldwide, we welcomed 51 million passengers to Amsterdam Airport Schiphol in 2012, a 2.6% increase compared to 2011. Schiphol maintains its position as the fourth passenger airport in Europe with a 10.7% market share. The economic crisis is, however, reflected in the cargo transport volume, which decreased by 2.6% to a little less than 1.5 million tonnes.

Growing number of passengers at Schiphol
In 2012, the total number of passengers at Schiphol increased by 2.6% to 51 million. The increase was small compared with 2011 (10.0%) as the increase in that year was exceptionally high, in part due to a recovery effect. The number of OD passengers (passengers with Schiphol as their point of origin or destination) increased by 2.1% to 30.1 million. The number of transfer passengers increased by 3.4% to 20.9 million, which is 41% of the total number of passengers.

Home carrier KLM and its SkyTeam partners, which together account for the largest segment, showed the highest growth in absolute terms and transported 32.3 million passengers in 2012, an increase of more than 1 million (+3.2% compared with +8.5% in 2011).

The highest relative growth was achieved by the low-cost carriers, the second-largest segment. The number of passengers of these airlines increased by more than 6.8%, which equals an absolute growth of 0.4 million to 7.1 million. However, the increase was substantially lower than in 2011 (+24.7%).

As in previous years, July was the busiest month in 2012 with more than 5.2 million passengers, an increase of 1.4% compared with July 2011. This is a record number for Schiphol: never before have so many passengers travelled to or from Schiphol over the period of one month. With 177,700 passengers, 20 July was the busiest day.

With 34.7 million passengers, Europe was, as always, the continent with the largest passenger volume travelling via Schiphol. Europe also, again, accounted for the largest absolute growth in the number of passengers by 811,000 or 2.4%. Africa showed the highest relative growth at 8.4% to 2.8 million passengers, followed by Central and South America: 6.7% to 2.3 million passengers. The number of Asian passengers was in line with 2011 at 4.3 million

Passengers per continent
(in %)

- 4.5
- 2.8
- 5.5
- 8.4
- 10.9
- 67.9

51.0 m

- Europe
- North America
- Asia
- Africa
- South America
- Middle East
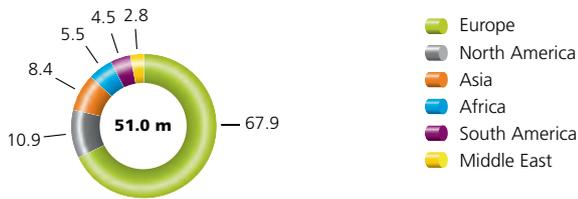
passengers, an increase of 3.1%. With 5.6 million passengers, North America held second place in terms of absolute passenger volumes, a slight increase of 1.2% The only region with a declining number of passengers was the Middle East: a decrease of 5.5% to 1.4 million passengers.

Load factor again higher
Again in 2012, there was an increase in the average load factor of passenger aircraft to 80.7% compared with 79.2% in 2011. The number of available seats increased by 460,000, or 0.7%, to more than 63 million.

Destinations network
In 2012, the number of direct destinations increased by four. 101 carriers connected Amsterdam Airport Schiphol with 317 scheduled destinations, 24 of which only with full freighters. Passengers could choose from 293 scheduled destinations, eight more than last year.

Compared with 2011, the number of intercontinental destinations increased by two, to 123. Additions made by KLM included Luanda (Angola), Lusaka (Zambia) and Harare

(Zimbabwe). Three new destinations in North America were offered, but only during the summer months. These were Dallas/Fort Worth (KLM) and Las Vegas and Oakland (ArkeFly).

On balance, the number of European scheduled flight destinations increased by six to 170. With newcomer Eurolot, the Schiphol-network was expanded with Gdansk and Krakow. easyJet started service to Southend, London's sixth airport.

On balance, the total number of airlines at Schiphol decreased by two to 101. This decrease can, in part, be attributed to the bankruptcies of Malév, Amsterdam Airlines, Cimber Sterling and WindJet, to the EU flight ban for Syrian Arab Airlines and the takeover of Continental by United Airlines. Newcomers in 2012 include the Polish airline Eurolot and full freighter airline Air China Cargo.

In 2012, the number of members of the SkyTeam Alliance increased to 19. Newcomers were Saudia, Middle East Airlines, Aerolíneas Argentinas and Xiamen Airlines. Furthermore, a collaboration between Air France-KLM and Etihad Airways and Air Berlin was announced.

Air transport movements
The number of air transport movements is important in connection with the agreements that have been made within the Alders Platform regarding the growth of Schiphol. According to these agreements, the maximum number of air transport movements is set at 580,000 in 2020, 70,000 of which must take place at Eindhoven Airport and

5.6 (+1.2%)

34.7 (+2.4%)

4.3 (+3.1%)

1.4 (-5.5%)

2.8 (+8.4%)

2.3 (+6.7%)
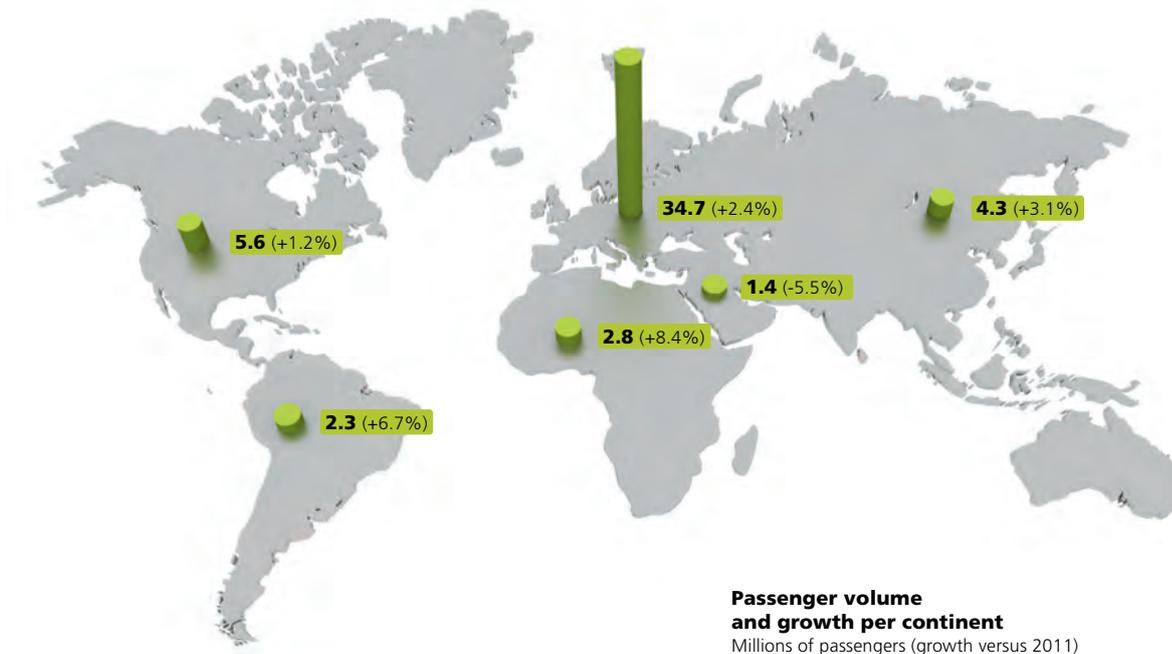
**Passenger volume
and growth per continent**
Millions of passengers (growth versus 2011)

Lelystad Airport. In 2008, the year that the Alders agreement was made, the number of air transport movements was 425,000. Due to the economic crisis in large parts of the world, this number decreased to less than 390,000 in the years 2009 and 2010. In 2011, traffic volume increased again to 420,249 air transport movements. This growth continued in 2012.

In 2012, the number of air transport movements in commercial traffic increased by 0.8% (8.8% in 2011) to 423,407. The number of air transport movements with passenger aircraft increased by 0.9% (9.1% in 2011) from 404,321 to 407,864. The increase in the number of available seats was slightly lower at 0.7% to 63.2 million. The average seating capacity remained virtually the same at 155. This can be explained by the fact that the higher number of air transport movements were flown by the same type of passenger aircraft as in the previous year.

The number of air transport movements carried out by cargo aircraft decreased by 2.4% in 2012 (+2.1% in 2011) to a total of 15,543 movements. The average maximum take-off weight of these aircraft fell from 328.6 tonnes in 2011 to 324.2 tonnes in 2012. The average size of cargo aircraft used was smaller.

Economic crisis affects cargo transport

The stagnating economy had a negative effect on cargo transport. Lower spending and consumer confidence resulted in a decrease in cargo supply in 2012. The year ended with a negative growth. Cargo volumes decreased by 2.6% (+0.8% in 2011) to a total volume of 1,483,448 tonnes.

Transport with full freighters, which are aircraft that only carry cargo, decreased by 0.9% (+2.3% in 2011), from 882,400 tonnes in 2011 to 874,700 tonnes in 2012. Cargo transport with aircraft used to transport both passengers and cargo declined by 5.1% in 2012 (-1.3% in 2011), from 641 thousand tonnes to 608 thousand tonnes.

Developments by continent

Cargo transport to and from Asia showed the biggest decline: -7.9% (-7.1% in 2011) from 610 thousand tonnes to 561 thousand tonnes, in part as a result of a decrease in demand in Europe for Asian products. The decrease in import was bigger than the decrease in export. The cargo transport volume to and from North America, the second largest cargo region, also decreased by 7.9% from 283 thousand tonnes to 261 thousand tonnes compared to a growth in this region in 2011 of 11.6%. There was a marginal decrease in the cargo volume transported to and from Central and South America of 0.3% (to 174 thousand tonnes), compared to an increase of 11.3% in 2011. This decrease was limited mainly as a result of to the growth of the Brazilian economy. Cargo volumes to and from Africa

Air transport movements 2012

Ranking 2012	Ranking 2011	Airline	Total	Compared to 2011 in %
1	(1)	KLM	**213,656**	2.6
2	(2)	transavia.com	**27,001**	0.7
3	(3)	easyJet	**25,676**	9.2
4	(4)	Air France	**14,551**	− 1.5
5	(6)	Delta Airlines	**10,984**	0.5
6	(7)	British Airways	**10,942**	3.8
7	(5)	Lufthansa	**10,868**	− 2.0
8	(8)	ArkeFly	**7,884**	10.3
9	(9)	Alitalia	**6,191**	7.3
10	(12)	Aer Lingus	**5,078**	2.9
11	(10)	SAS	**4,992**	− 4.1
12	(13)	Vueling	**4,914**	0.9
13	(18)	Flybe	**3,594**	33.9
14	(11)	Martinair	**3,513**	− 29.8
15	(16)	Turkish Airlines	**2,912**	7.4
16	(14)	Swiss	**2,902**	− 0.4
17	(32)	United Airlines	**2,775**	108.0
18	(15)	Austrian Airlines	**2,708**	− 1.2
19	(20)	TAP Portugal	**2,588**	6.6
20	(25)	China Southern	**2,370**	31.1
21	(46)	Corendon Dutch Airlines	**2,028**	137.7
22	(22)	Corendon	**2,017**	2.4
23	(24)	LOT Polish Airlines	**1,832**	− 0.9
24	(17)	Iberia (incl Iberia Express)	**1,828**	− 32.5
25	(52)	Onur Air	**1,736**	118.1
26	(27)	Royal Air Maroc	**1,711**	1.1
27	(34)	Norwegian	**1,710**	37.9
28	(23)	Singapore Airlines	**1,574**	− 15.6
29	(29)	Cathay Pacific	**1,494**	6.4
30	(37)	Pegasus	**1,494**	21.5
Other airlines			**39,884**	**− 11.4**
Total			**423,407**	**0.8**

decreased by 4.3% to 177 thousand tonnes. To and from the Middle East, cargo transport decreased by 2.2%. Cargo volumes within Europe increased by 44.2% to over 138 thousand tonnes.

New cargo carriers and cargo destinations

In 2012, a few new full freighter airlines, including Air China Cargo and Swiftair, started a service from Amsterdam Airport Schiphol. We said farewell to carrier Jade Cargo. In total, there were 19 full freighter airlines and eight airlines with both a full freighter and passenger service. This is an increase of four compared to 2011.

Cargo per continent
(in %)

- Asia
- North America
- Africa
- South America
- Middle East
- Europe

1.5 m tonnes

9
12
12
12
38
18
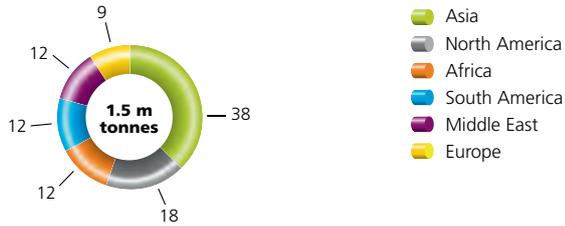
The number of unique full-freighter destinations, which are destinations to and from which only cargo is transported, decreased by four from 28 to 24. This is largely due to the exit of carrier Jade Cargo. Some new full freighter destinations, such as Zhengzhou and Chongqing, were added to the network.
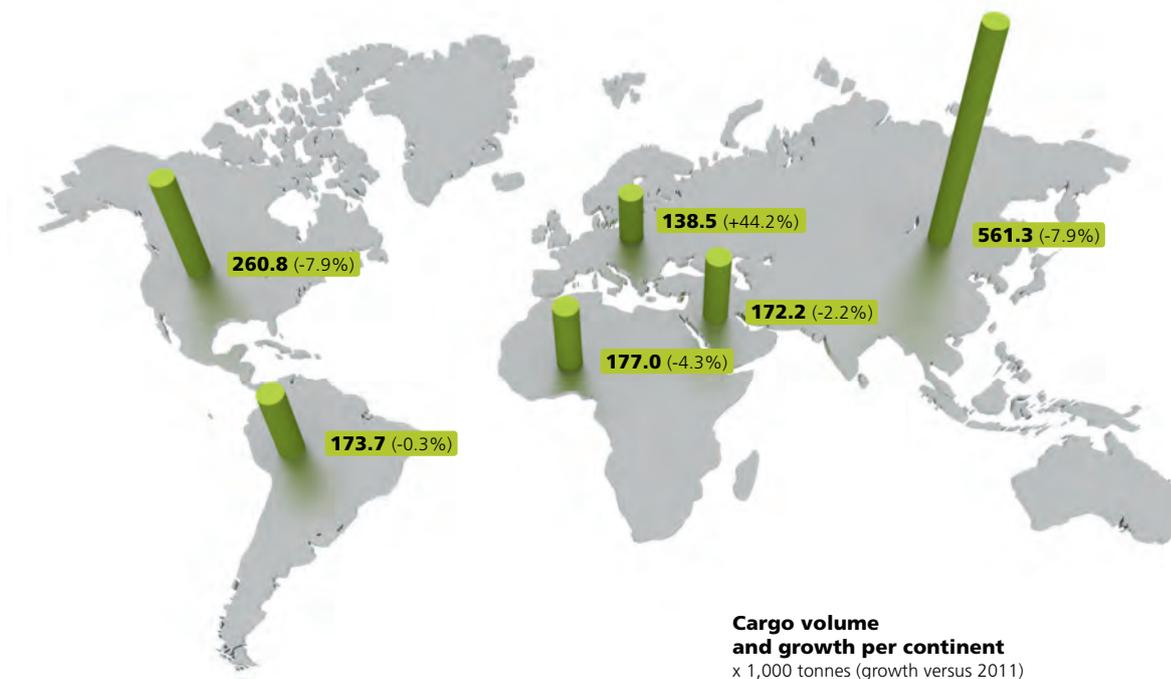
Market share Schiphol maintained

Passenger market share

In 2012, Amsterdam Airport Schiphol maintained its position as the fourth passenger airport in Europe behind market leader London Heathrow followed by Paris Charles de Gaulle and Frankfurt. The market share of Schiphol dropped slightly compared with last year: from 10.9% to 10.7%.

Cargo market share

Amsterdam Airport Schiphol ranks third in the top ten of European cargo airports. Frankfurt and Paris Charles de Gaulle take first and second place. The market share of Schiphol increased by 0.1% to 13.9%.

260.8 (-7.9%)
138.5 (+44.2%)
561.3 (-7.9%)
172.2 (-2.2%)
177.0 (-4.3%)
173.7 (-0.3%)

**Cargo volume
and growth per continent**
x 1,000 tonnes (growth versus 2011)

Passengers (excl. transit-direct)*
x 1,000

				2012	Compared to 2011 in %
	1	London Heathrow	LHR	69,985	+ 0.9
	2	Paris Charles de Gaulle	CDG	61,490	+ 1.0
	3	Frankfurt	FRA	57,274	+ 1.7
	4	**Amsterdam**	**AMS**	**50,976**	**+ 2.6**
	5	Madrid	MAD	45,104	− 9.0
	6	Istanbul	IST	44,999	+ 20.0
	7	Munich	MUC	38,193	+ 1.6
	8	Rome Fiumicino	FCO	36,741	− 1.8
	9	Barcelona	BCN	35,091	+ 2.2
	10	London Gatwick	LGW	34,211	+ 1.7

*) Top 10 passenger airports in Europe

Cargo volume*
x 1,000 tonnes

				2012	Compared to 2011 in %
	1	Frankfurt	FRA	1,986	− 6.9
	2	Paris Charles de Gaulle	CDG	1,950	− 6.6
	3	**Amsterdam**	**AMS**	**1,483**	**− 2.6**
	4	London Heathrow	LHR	1,465	− 1.3
	5	Leipzig	LEJ	864	+ 13.6
	6	Cologne	CGN	730	+ 0.5
	7	Luxembourg	LUX	615	− 6.4
	8	Liège	LGG	577	− 14.5
	9	Istanbul	IST	522	+ 4.9
	10	Brussels	BRU	459	− 3.3

*) Top 10 cargo airports in Europe

Air transport movements*
x 1,000

				2012	Compared to 2011 in %
	1	Paris Charles de Gaulle	CDG	491	− 3.1
	2	Frankfurt	FRA	476	− 1.1
	3	London Heathrow	LHR	471	− 1.0
	4	**Amsterdam**	**AMS**	**423**	**+ 0.8**
	5	Munich	MUC	377	− 2.9
	6	Madrid	MAD	373	− 13.1
	7	Istanbul	IST	349	+ 14.4
	8	Rome Fiumicino	FCO	309	− 4.6
	9	Barcelona	BCN	290	− 4.3
	10	Zurich	ZRH	252	− 2.3

*) Top 10 airports in Europe in air transport movements

Regional airports and International participations

Regional airports

The number of passengers at Eindhoven Airport increased from 2.6 to 3.0 million in 2012. In addition, the number of destinations that can be reached from Eindhoven Airport increased from 36 to 46 in 2012. Rotterdam The Hague Airport also showed growth from 1.1 to 1.3 million passengers. The number of destinations that can be reached from Rotterdam The Hague Airport increased from 35 to 40.

The agreements that have been made within the Alders Platform affect the development of Eindhoven Airport and Lelystad Airport. Examples include the expansion of the terminal building at Eindhoven Airport and the paving extensions of the runway at Lelystad Airport. Rotterdam The Hague Airport is increasingly developing into a business airport.

International participations

Our international focus lies mainly on improving the support for our main customers by jointly seeking cooperation with airports in other countries that are important for them. This strengthens our competitive position. The extensive global network of KLM and SkyTeam is an important starting point. The SkyTeam alliance is the largest transatlantic joint venture within the aviation sector with Amsterdam Airport Schiphol, Paris Charles de Gaulle and JFK International Airport as major hubs. We will continue to properly manage existing shareholdings and international partnerships.

Aéroports de Paris, with which Schiphol Group has formed a strategic alliance (HubLink) and an 8% cross-shareholding, again contributed positively to the result in 2012. An important achievement of the Paris airports is the increase in quality perception compared to 2011, in part due to new facilities such as the new boarding satellite at Paris Charles de Gaulle that opened in 2012. The collaboration projects between the two airport organisations have generated further benefits resulting from, among other things, joint purchasing and the use of each other's 'best practices'.

Schiphol Group and Aéroports de Paris have formed a strategic alliance with the international airport of Seoul, Incheon Airport. In 2012, we carried out several projects together with this airport, which has been elected best airport in the world seven years in a row. These projects enabled us to exchange operational knowledge, in particular in the area of Asian passengers and cargo. Incheon is the home base of SkyTeam partner Korean Air and the fourth largest cargo hub in the world.

The expansion of Terminal 4 at JFK International Airport in New York that we have commissioned together with Delta Airlines, is on schedule. The expansion encompasses nine new international gates and additional facilities for baggage handling, customs and border control.

The cooperation with Aéroports de Paris, the alliance with Incheon and the expansion of Terminal 4 at JFK International Airport all contribute to the further strengthening of the international hub system of the SkyTeam alliance.

Brisbane Airport, in which Schiphol Group has a 18.7% interest, continues to develop as an AirportCity and again recorded an increase in the number of passengers in 2012 (+4.5%). On 26 September, Schiphol Group sold its 1% interest in Vienna International Airport.

Accessibility

With respect to accessibility, Schiphol takes second place in the leading Airport Service Quality benchmark of European airports. An optimal combination of infrastructure, transport connections and transport products is essential for our competitive position. It makes the airport an attractive place to work and do business. After destinations offered and ticket price, accessibility of the airport is the main criterion for passengers.

Road traffic

Schiphol has invested in improving the traffic flow on the drop-off roads in front of the terminal. This included changes to the lanes, road signs and traffic markings, a new Short Stop Parking where visitors can park their car for a short while without any charge when picking up or dropping off passengers and the addition of a separate lane for coaches. This reduces congestion resulting from cars or buses stopping in the wrong place to pick up or drop off passengers. There is stricter supervision to ensure the smooth flow of traffic on the drop-off roads.

	Passengers in millions			Air transport movements		
	2012	2011	Growth	2012	2011	Growth
Rotterdam The Hague Airport	1.273	1.124	13.3%	13,565	13,137	3.3%
Eindhoven Airport	2.977	2.643	12.6%	22,995	20,227	13.7%
Lelystad Airport				114,508	123,035	-6.9%

Public transport

In 2012, the public transport facilities at Schiphol were improved. The number of ticket vending machines of Dutch railway company NS was increased, which resulted in shorter queues.

The number of direct train connections to Schiphol has increased. An example is the new Hanze Line, which reduces the travel time from Groningen to Schiphol by 22 minutes to two hours and 11 minutes.

In 2012, preparations were made for the introduction of the public transport chip card at Schiphol in line with the rest of the Netherlands. The chip card will be the only valid method of payment on all bus lines and in trains. It has been agreed with NS that instead of access gates, separate card readers will be used at Schiphol, because this is easier for passengers with suitcases. To eliminate the confusion among tourists about the difference in charges, the surcharge for the high-speed train to Amsterdam Central Station will no longer apply. Schiphol travel information is now displayed on monitors at Amsterdam Central Station and the train station Amsterdam Zuid.

In 2012, a start was made with the expansion of the designated bus lane network with a route along Schiphol-East, which will save thousands of employees in this area a considerable amount of time. A hub for regional public transport will be created at Schiphol-North. It is expected that the bus lane and the hub will be ready for use in 2014.

The bus service during off-peak hours to and from Schiphol-Rijk and Schiphol-Southeast was discontinued as a result of government budget cuts. In collaboration with the companies located in this area, Schiphol has established a shuttle bus service. Since December, there is also a bus service between Schiphol Plaza and the new business park Schiphol-Northwest. Since the switch of the high-speed bus service 370 between Schiphol and Alphen aan den Rijn to a 24-hour timetable, this connection can also be used by employees with irregular working hours or employees who work in shifts.

Taxi transport

Schiphol grants concessions to taxi companies that allow them to accept rides from the airport. In 2012, there was an increase in the number of unlicensed taxi drivers accepting rides. For this reason, stricter enforcement standards are being applied. This resulted in less problems with this kind of illegal service. Via the public address system in the terminal, passengers are informed that they should only make use of licensed taxis.

A number of times a year, we employ mystery guests to investigate the quality of the taxi rides. They take taxi rides to a variety of destinations. Items that are checked during the ride include the visible presence of the price list, the driving style and behaviour of the driver and the fare paid. 95% of the evaluated taxi rides scores well on the tested items.