‘Heathrow: Future Capacity and Adaptability’
Agenda

Overview of Heathrow

Demand forecasting

Masterplanning

Factors that shape our masterplans

Heathrow past, present and future
Welcome to Heathrow – A complex city

- 70 million passengers each year – 185,000 every day
- 476,000 flights per year – 86 airlines, 183 destinations
- 2 runways – operating at 99% capacity

- 76,000 people work at Heathrow
- 100,000 additional local jobs are supported by Heathrow
- 323 companies work at Heathrow
Our vision: Become the UK’s direct connection to the world and Europe’s hub of choice by making every journey better.
Future Demand Forecasting

Passenger numbers
Plane types – size, weight, technology
Airline alliances and airline ownership
Competitors
Social trends
Passenger expectations
Airline requirements
Environmental
Technological
Political
Masterplanning

Runway capacity
Stand capacity
Terminal capacity
Surface access

Infrastructure
  – Heating
  – Cooling
  – Power
  – Aircraft fuel systems
  – Drainage
  – Communications and IT
  – Baggage
Updated 2R Masterplan to meet 80mppa 2030 demand forecast

**T5 Campus**
- T5A not extended
- Fuel farm to remain long term
- E & F Taxiways moved westward to improve alignment for D satellite

**T2 Campus**
- T2A needs to be larger than Phase 2 ‘red-line’
- E Satellite not required, but safeguarded for upturn / ATM growth scenarios
- T3IB usage by T2 post T3 closure opportunities

**Connectivity & Surface Access**
- Viable TTS route across CTA
- Southern Road Tunnel requirement
Understanding the timing to further Masterplan development

Blue line: Proposed £3bn investment path maintains stand supply ahead of forecast demand through Q7/8

Green line / area: Do nothing capex scenario will constrain stand supply in Q7/8 which will result in decreased resilience, pier service level drop & aircraft upgrades being turned away.

Assumes northern taxiways upgraded for A380, But T2B not finished & T1 apron not reconfigured.

Projected stand supply to meet demand
Stage 7 – 33kV network complete

2009 2010 2011 2012 2014 2017 2018
Environmental Factors

Climate Change
Air Quality
Technological Factors

Wireless communications
IT - common infrastructure
Political Factors

Security
Planning conditions and building regulations
Deregulation of air transport
Economic Factors

Airline ownership
Safeguarding
Regulation
Transfer passengers
Reducing operational cost
We’ve transformed the airport in the last 10 years

*Heathrow 2002*
Heathrow “Tomorrow”

2 Runway Heathrow Master Plan
The next step towards the master plan

*Our new T2 opens in June 2014....*
Heathrow
Making every journey better