



‘Heathrow: Future Capacity and Adaptability’

April 2014

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Heathrow
Making every journey better

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

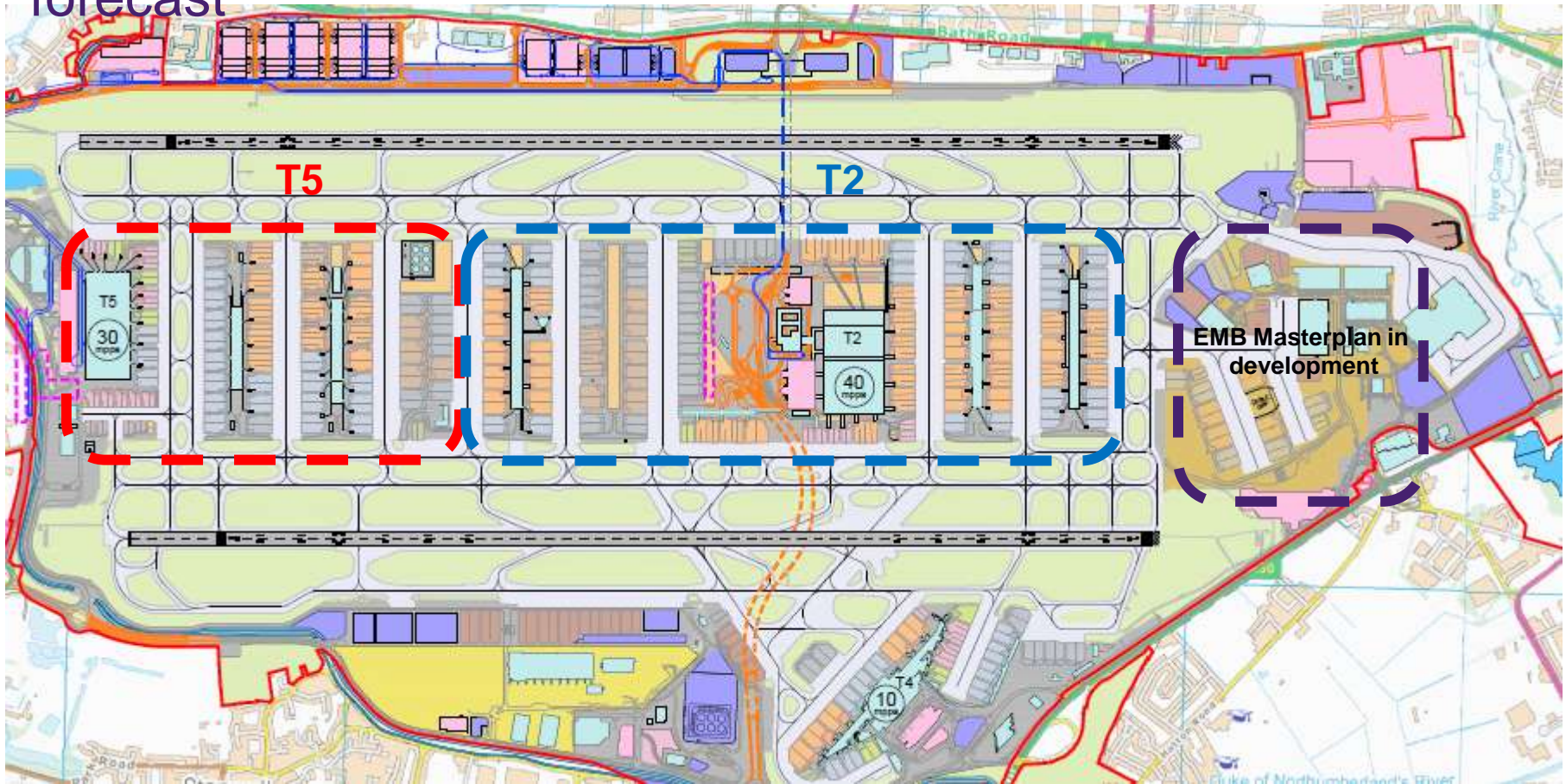
Terminal capacity

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

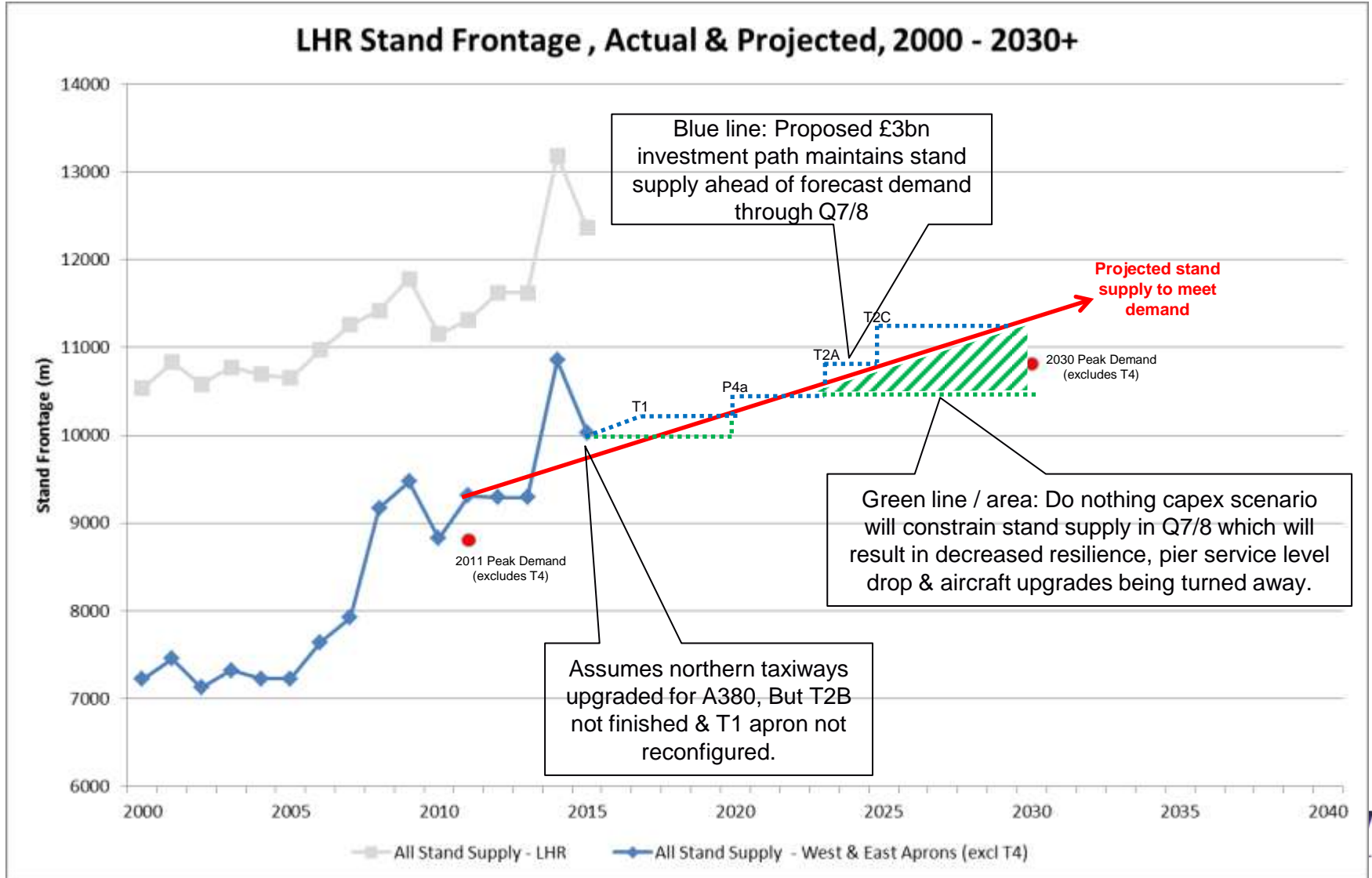
T2 Campus

- 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



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

A New Approach

Heathrow's options for connecting the UK to growth



Option 1:
Third Runway
North West

Option 2:
Third Runway
South West

Option 3:
Third Runway
North

We have one of the world's most successful hub airports in Heathrow. The UK can choose to build on strength, and connect to economic growth more quickly and at lower cost than any other option, all while reducing Heathrow's overall noise footprint. Or start again from scratch.

We believe there's a compelling case for expanding our airport, so we've submitted our options for a three runway Heathrow to the Airports Commission.

To find out more visit The Hub or www.heathrow.com/newapproach.

Look out for a printed summary of our options, or download it to your smartphone by using the QR code.



Heathrow
Making every journey better

Economic Factors

Airline ownership

Safeguarding

Regulation

Transfer passengers

Reducing operational cost

We've transformed the airport in the last 10 years

Heathrow 2002



Heathrow
Making every journey better

Heathrow Today

Heathrow 2013



Heathrow “Tomorrow”

2 Runway Heathrow Master Plan



The next step towards the master plan

Our new T2 opens in June 2014....



Heathrow

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