



Taking Britain further

Heathrow's plan for connecting the UK to growth

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Heathrow

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Foreword

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Heathrow today is one of the biggest, and according to passengers one of the best, airports in the world. Over the last ten years we have used over £11 billion of private investment to transform Heathrow into a national asset of which Britain can be proud.

For 350 years the world's largest port or international airport has been in Britain. Today, that source of competitive advantage is being gradually eroded. The Airports Commission process is the last and best chance for Britain to take action to maintain its global connections before it is too late.

The UK is in a global competition for trade, jobs and economic growth. Direct flights support the economic growth that Britain needs. They support exports to fast-growing markets, make the UK a more attractive location for business, and bring tourists to our shores.

Connections to long-haul markets are important to Britain's competitiveness. The fastest growing markets of the next 50 years will be in Asia, Latin America and North America while traditional markets in Europe face a slower growth future.

That is why our competitors are investing in their airports, and in one type of airport in particular – the hub. Hub airports are the only airports that support frequent and direct long-haul flights. By combining transfer passengers, direct passengers and freight they are able to fill long-haul aircraft and serve destinations that cannot be served by airports which rely on local demand alone. This is why Heathrow, as the UK's only hub, accounts for only around 20% of the flights from the UK but nearly 80% of long-haul flights. Having a successful hub airport is uniquely important for reaching the markets that are critical to Britain's economic future.



There are only six airports in the world that have more than 50 long-haul routes. Heathrow is one of them. But while Britain has good air connections today, it has not invested in the capacity it needs for the future. For 50 years the debate about new runways has been beset by delay, prevarication and indecision. Now, our hub airport is running at 98% capacity and growth can't wait.

In 2010, Heathrow received a very clear message from all three major party leaders – “We reject your plans for a third runway”. We accepted this and stopped work on our proposals. The economic case for Britain was strong, but we had not developed a good enough solution on aircraft noise, compensation or environmental impacts. The establishment of the Airports Commission put the issue of airport capacity back on the political agenda. But we have been clear that any option needed to be significantly different from what was previously rejected.

We have listened to people - local residents, local businesses, national businesses, local politicians, MPs around the country, airlines, our employees - about what was wrong with our previous plans and what they would want to see in any revised proposal.



We called our submission to the Airports Commission last July “A New Approach”. It was a very consciously chosen title. Compared to the 2009 proposal, our new plans deliver greater benefits with fewer impacts. They will generate more jobs, have more capacity for freight exports, and link every region of the UK to growth while seeing fewer people affected by noise, fewer homes demolished, and providing new green space for local residents. We will continue to listen to those with an interest in our plans.

Britain faces a choice. Heathrow is one of the world's most successful hub airports. We can decide to build on this strength. Or we can start

again from scratch with a new hub or gamble on uncertain alternative airport models. Building on our existing strength at Heathrow will connect the whole of the UK to growth, keep Britain as an ambitious global nation and help the UK win the global race. Starting from scratch will see the UK fall behind.

Only Heathrow will connect every part of Britain to every part of the world.

Heathrow will take British people and businesses farther with the long-haul routes it provides than no other UK airport can.

Heathrow will also take Britain further by supporting the trade, inbound tourism and investment that will deliver the jobs and economic growth we need.

Now more than ever Britain needs to be connected. Instead, with each passing year we are cutting ourselves off from jobs and growth.

It's time to have the vision and the courage to connect Britain to the growth it needs.

It's time for a third runway at Heathrow.

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The Airports Commission

In September 2012, the Government announced the creation of an independent Airports Commission, chaired by Sir Howard Davies, to recommend to Government options for maintaining the UK's status as an international hub for aviation. The Commission was tasked with producing an interim report by the end of 2013, which included a shortlist of the most credible options for new runway capacity.

The Airport Commission's interim report concluded that there is a need for at least one new runway in the South East of England before 2030. After considering more than 50 proposals it short-listed two airports as options for new runways: Heathrow and Gatwick. At Heathrow the Commission shortlisted an option for a new runway submitted by the airport, which is the subject of this document. It also listed a proposal for extending the northern runway to the west to enable it to operate as two separate runways which was submitted by an independent organisation not connected to the airport called Heathrow Hub Ltd.

The Commission is also looking in more detail at the option of a new airport in the Thames Estuary.

In order to inform its final recommendations, the Commission requires all short-listed schemes to be developed in more detail and then appraised to the same standard. The Commission has therefore asked the promoters of each short-listed option to submit a refreshed scheme design. This document outlines the highlights from our technical submission. The full technical document can be found on our website at heathrow.com.

In the autumn of 2014, the Airports Commission will consult on all the short-listed options and its appraisal of those options. It will produce a final report and recommendations to Government in Summer 2015.



“Decisions on airport location and capacity are among the most important strategic choices a country or city can make...”

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Our ten commitments



We have made ten commitments that set out what Britain can expect from a third runway at Heathrow and which show the difference between our proposal today and the proposals of the past. **If Government supports a third runway at Heathrow, we will:**

1	Connect Britain to economic growth	by enabling airlines to add new long-haul flights to fast-growing markets
2	Connect UK nations and regions to global markets	by working with airlines and Government to deliver better air and rail links between UK regions and Heathrow
3	Protect more than 100,000 existing local jobs and create more than 100,000 new jobs nationwide	by developing our local employment, apprenticeships and skills programmes and supporting a supply chain throughout the UK, including during construction
4	Connect exporters to global markets	by doubling Heathrow's freight handling capacity
5	Build more quickly and at lower cost to taxpayers than building a new airport	by building on the strength the UK already has at Heathrow
6	Reduce aircraft noise and lessen noise impacts for people under flight paths	by encouraging the world's quietest aircraft to use Heathrow, routing aircraft higher over London, delivering periods with no aircraft overhead and allocating £250m to provide noise insulation
7	Treat those most affected by a third runway fairly	by proposing compensation of 25% above market value, all legal fees, and stamp duty costs for a new home for anyone whose home needs to be purchased
8	Increase the proportion of passengers using public transport to access Heathrow to more than 50%	by supporting new rail, bus and coach schemes to improve public transport to Heathrow and considering the case for a congestion charge
9	Keep CO₂ emissions within UK climate change targets and play our part in meeting local air quality limits	by incentivising cleaner aircraft, supporting global carbon trading, and increasing public transport use
10	Reduce delays and disruption	by eliminating the routine use of aircraft stacks and further improving Heathrow's resilience to weather and unforeseen events

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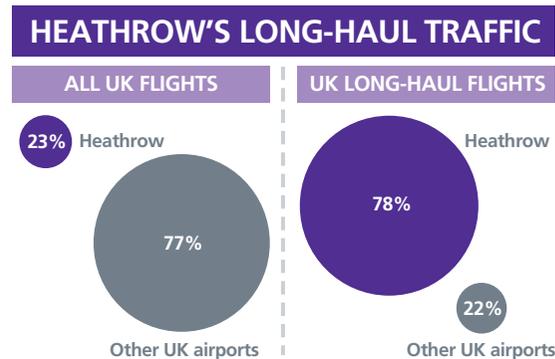
Executive summary

The global competition for trade and economic growth

Britain has prospered as a trading nation. Connections to the centres of the world economy have always supported our trade. Distant economies like China, India, Mexico and Brazil are growing quickly, while traditional markets in Europe face a lower growth future. The UK is in a global race to improve links with emerging economies and deliver the trade, jobs and economic growth that will otherwise go to our international competitors. While it has good air connections today, Britain has not invested in the runways it needs for the future. The debate about new runway capacity in the UK has been beset by delay and prevarication while our European and global competitors have pressed ahead and built the new runways they need. Our global hub at Heathrow is running at 98% capacity, while hub airports at Paris, Frankfurt and Amsterdam have spare capacity and are able to add new flights to growth markets like China. This is bad for Britain's future as a global economic power.

The Airports Commission short-list

The Government set up the Airports Commission to make recommendations on maintaining the UK's status as an international hub for aviation. The Commission has been asked to examine all of the evidence and make an independent recommendation about new runways to Government in summer 2015. The Airports Commission published an interim report at the end of 2013 and concluded that there is a need for at least one new runway in the South East of England before 2030. After considering more than 50 proposals it has short-listed two airports as options for new runways: Heathrow and Gatwick.



The unique value of a hub

Heathrow and Gatwick are different. Heathrow is the UK's only hub airport. It serves long-haul business destinations. British Airways is its biggest airline. Gatwick is a point-to-point airport. Passengers largely fly to short-haul and leisure destinations. easyjet is its biggest airline. That's why Heathrow is not opposed to a second runway at Gatwick. Both airports are important but they do different things. A second runway at Gatwick is not a substitute for a third runway at Heathrow. Only a third runway at Heathrow will connect all of Britain to long-haul markets by pooling together demand from all over Europe. Britain is already losing routes to other European hubs. Meanwhile the Airports Commission estimates there is spare capacity at point-to-point airports in the South East until around 2040.

The greatest economic benefits

Heathrow would deliver greater economic benefits to the UK than any other option. It will create jobs, facilitate trade and tourism, boost spending in the wider economy and improve public finances. We estimate that benefits of at



least £100 billion present value (PV) would accrue to the UK from expanding Heathrow. Expanding Heathrow would protect the existing 110,000 local jobs that depend on the airport and create 123,000 new jobs across the UK.

Listening to people to improve our plans

Since we published our initial options last July and were shortlisted by the Commission in December we have engaged with the public, businesses, passengers, airport users, statutory consultees and elected representatives. Both locally and across the UK, we now have a better understanding of the issues that are important to people and we have improved our plans in response. In this refreshed scheme, we have located the runway further south and closer to the existing runways. This reduces noise impacts and protects more homes and important heritage sites. The number of people affected by significant noise will fall by at least 12,000 compared to our submission last July. The number of properties requiring compulsory purchase has been reduced by 200. The revised scheme also avoids the need to redevelop the M4/M25 junction.

Our vision for a world-class passenger hub

Our vision is for Heathrow to continue to be a globally competitive transport hub for the UK. Our airport masterplan will deliver a world-class hub in terms of: passenger experience; transfer journeys; surface transport; resilience and reliability; and cargo and commercial facilities. Our masterplan prioritises periods of relief from noise for local communities. It also sees the provision of new green spaces and flood protection for local communities.



Heathrow will be Britain's 21st century gateway to the world and the first impression of our country for arriving visitors. We would use the unique opportunity of a third runway to deliver an airport of which the whole country can be proud.

Bringing the benefits of growth to the whole country

Our vision is to connect Heathrow to every economic centre in the UK, bringing additional trade, tourism and economic growth to the whole country. Better rail connections will include Crossrail, the Piccadilly Line upgrade; Western Rail Access; Southern Rail Access; and HS2. Heathrow's rail capacity will treble from 5,000 to nearly 15,000 seats per hour or from 18 to 40 trains per hour. Journey times to cities around the UK will fall dramatically. Passengers boarding a train at Sheffield or Manchester could be checking in for their flight at Heathrow 90 minutes later. We will also work with airlines and Government to deliver better air links between UK regions and Heathrow.

4 Executive summary

The lowest noise levels since the 1970s

People have legitimate concerns about the environmental impact of a third runway. Expansion should only go ahead within strict limits on noise, local air quality and within the UK's climate change targets. There isn't a choice between more flights or less noise. Heathrow can deliver both. Heathrow is significantly quieter than it was in the past. Since the early 1970s both the area and the number of people within Heathrow's noise footprint have fallen tenfold, despite the number of flights doubling. Our proposals for a third runway at Heathrow will see noise reductions continue. Even with a third runway, we estimate that in 2030 there will be at least 30% fewer people within Heathrow's noise footprint than today. This would deliver the lowest noise levels around Heathrow since the 1970s.

Treating those most affected fairly

We are committed to treating those most affected by a third runway fairly. We are proposing that anyone whose home needs to be compulsorily purchased will receive 25% above market value compensation plus all legal fees and stamp duty costs on their new home. Residents in areas experiencing high noise or a significant increase in noise will be offered free noise insulation.

The fastest, most cost-effective route to new hub capacity

Heathrow offers the fastest, most cost effective and most practical route to delivering new hub capacity. Costs are estimated at £15.6bn, of which £11.1bn is airport infrastructure, £0.9bn is surface access, and £3.6bn is community compensation and environmental mitigation. The £15.6bn would be privately funded. Government support for other surface access improvements would be required and this is currently estimated at £1.2bn.

Politically and practically deliverable

A third runway is deliverable, politically and practically. Many local people support Heathrow expansion. There is a strong underlying business case and clear passenger and airline demand for Heathrow. With an asset base of more than £14bn and an investment grade credit rating, Heathrow is uniquely well positioned to fund a new runway. If Government takes a clear policy decision after the Commission reports then planning consent can be delivered by 2019, with the first flights using a third runway in 2025.





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Connecting for growth

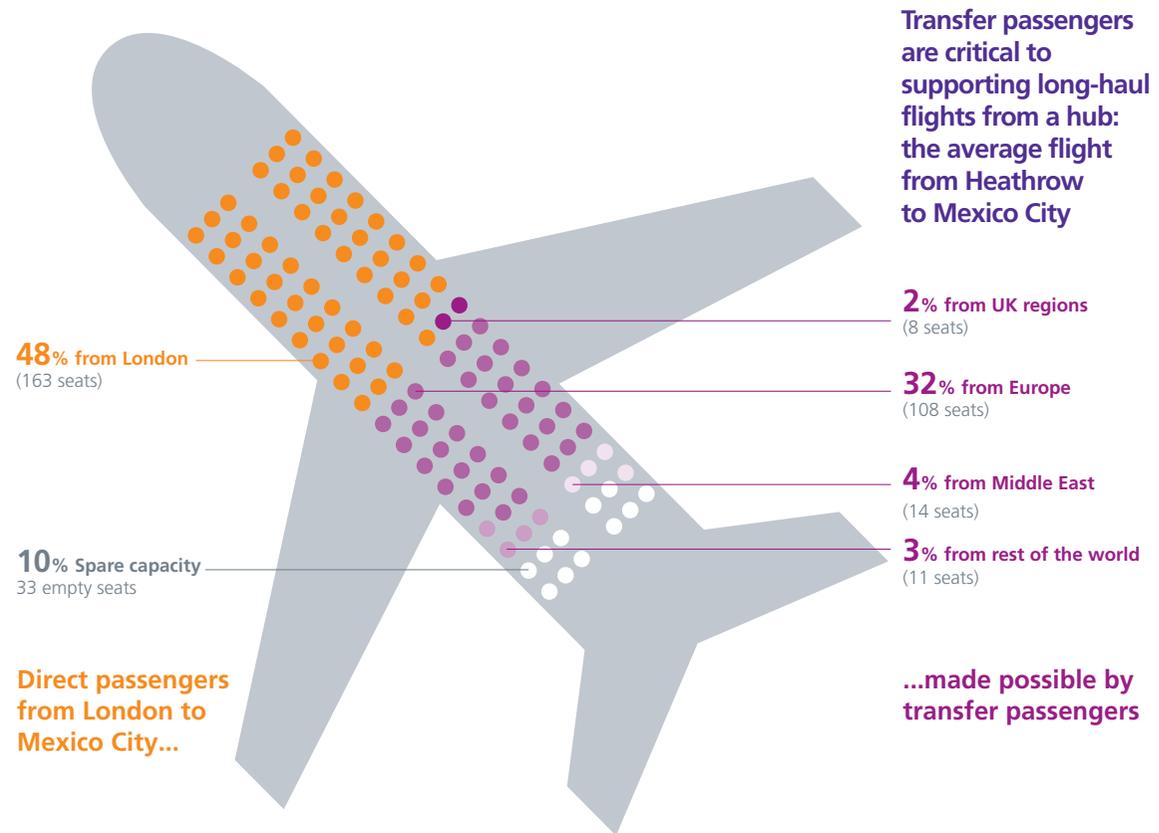
The global race

The global economy is changing

Most economic growth over the next 40 years will come from Asia, North America and Latin America while traditional markets in Europe face a lower growth future. This is why the UK needs better long-haul connections. The UK is in a global race to improve links with emerging economies and deliver the trade, jobs and economic growth that will otherwise go to international competitors.

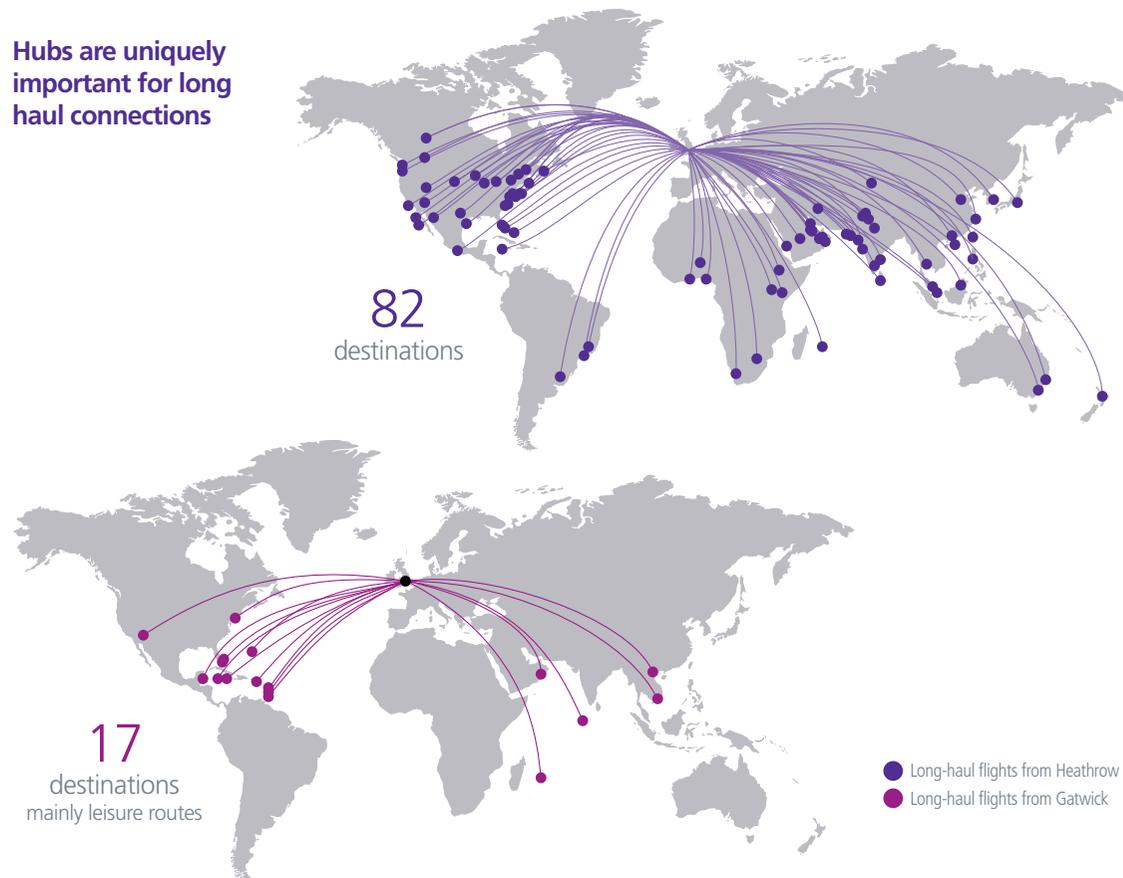
Britain's competitive position is under threat

While it has good air connections today, Britain has not invested in the runways it needs for the future. The debate about new runway capacity in the UK has been beset by delay and prevarication while our European competitors have pressed ahead and built the new runways they need. Our global hub at Heathrow is under threat, running at 98% capacity, while hub airports at Paris, Frankfurt and Amsterdam have spare capacity and are adding new flights to growth markets. Dubai, Istanbul and others are investing huge sums to capture the hub connectivity Britain has enjoyed for so long.





Hubs are uniquely important for long haul connections



Direct air connections support growth

Direct air connections support economic growth. As an island trading nation, connectivity has been central to the UK's global trading position over the past three hundred years, and is now more essential than ever. UK businesses trade 20 times more with emerging markets with daily flights than those with less frequent or no direct service. Continuing to have one of the world's best connected hub airports in the UK is vital to supporting economic growth.

Hub airports are uniquely important

At a hub airport local passengers and cargo combine with transfer passengers to allow network airlines to fly to a wide range of long-haul business destinations that could not be supported by local demand alone. Heathrow is the UK's only hub airport. Passengers can fly direct to 75 destinations world-wide from Heathrow that are not served by any other airport.

5 Connecting for growth

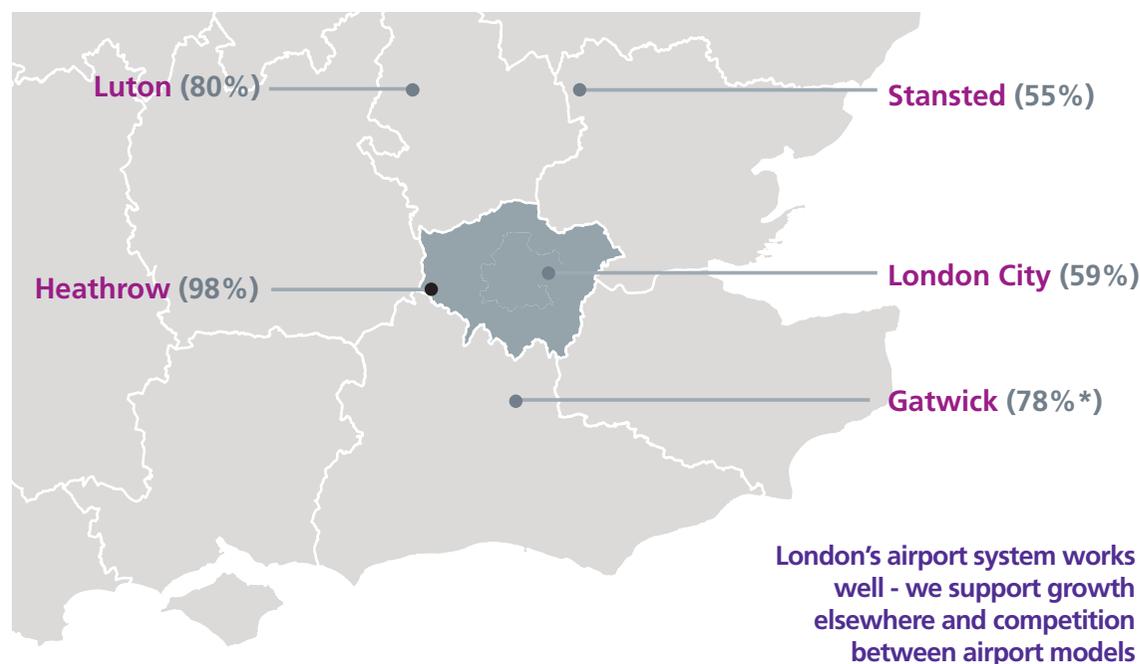
Competition and choice

The urgent need is for hub capacity

The UK has an urgent need for hub capacity. Heathrow is at capacity today and is losing routes to other European hubs. The uniqueness of hubs is shown by the spare capacity elsewhere in the London system. There is spare capacity at point-to-point airports in London like Gatwick, Stansted and Luton until around 2040. It is the flights from a hub airport that are critical to connecting Britain to long-haul markets. Heathrow needs a third runway as quickly as possible or Britain will fall behind its competitors in links to these markets.

We are not opposed to a second runway at Gatwick

We welcome competition and support Gatwick being allowed to grow and flourish alongside a successful Heathrow. However, Heathrow and Gatwick are different. Heathrow is a hub airport and serves long-haul business destinations by pooling demand from across Europe. Gatwick is a point-to-point airport and serves mainly short-haul and leisure destinations. Serving business and leisure destinations are both important but only a third runway at Heathrow can connect the UK to long-haul growth markets.



London's airport system works well - we support growth elsewhere and competition between airport models

Percentage of capacity utilised shown in brackets (flights capacity)

* Taking an average of winter and summer months



Winning the global race.

Britain is well placed to win the global race even with the changes in the world economy. Heathrow is within a 12 hour direct flight of 96% the world's wealthiest households (versus only 63% for Dubai). London is one of the world's most productive cities. It is a leading world city and travel destination. It boasts the world's largest long-haul aviation market today. Exploiting these advantages means that Heathrow can win for Britain with a third runway. There is no need to accept a decline in the UK's hub status.

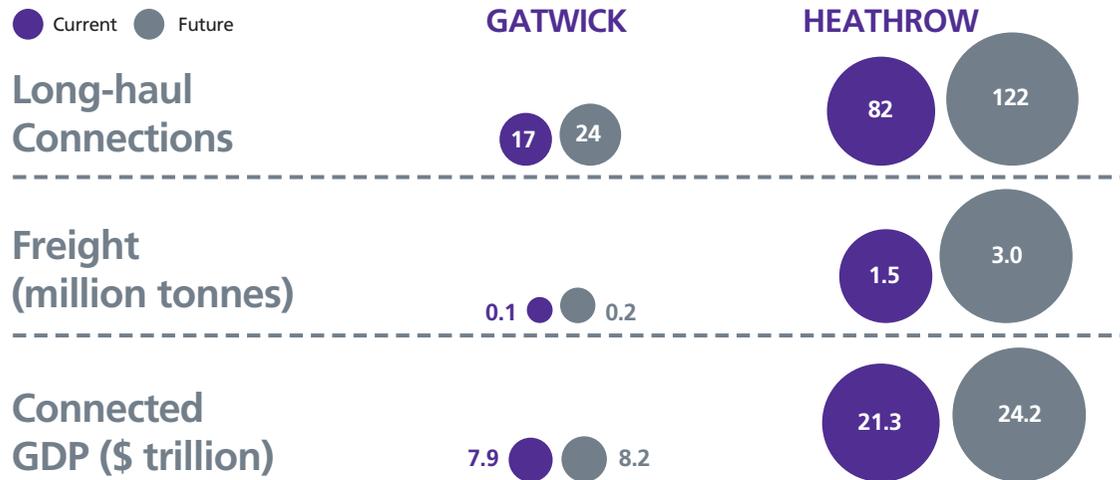
Only Heathrow has the scale to win for Britain globally

The Airports Commission's remit is to maintain the UK's aviation hub status. The debate should not be about Heathrow versus Gatwick, but about who is best placed to help Britain win in a competitive race against France, Germany, Holland, Turkey and the Gulf States. Heathrow is our only global hub airport, and the only airport with the size and scale to compete against hubs in Frankfurt, Paris and Amsterdam. It has a proven ability to deliver long-haul business flights. It has much of the infrastructure already in place

including world-class terminals and road and rail connections. Airlines want to fly to Heathrow. It is best placed to help Britain win in the race for growth. A second runway at Gatwick will only make Britain better connected to Europe. Flights that rely on transfer passengers cannot operate from point-to-point airports. Network airlines have a different business model from point-to-

point carriers. They do not have the expensive transfer baggage or freight handling facilities of a hub. Adding capacity at Heathrow will provide future capacity in the London system for any type of flight. Adding capacity at Gatwick will not provide any capacity for network airlines who rely on transfer passengers, meaning the UK will lose its aviation hub status.

Gatwick is no substitute for adding capacity at Heathrow



5 Connecting for growth

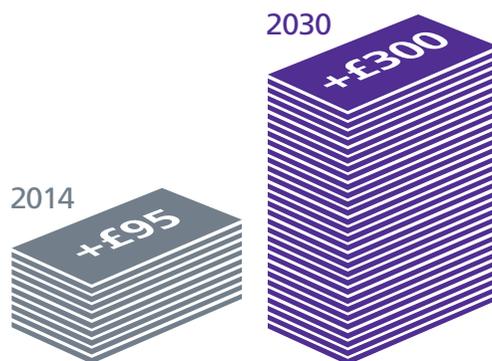
Best for passengers

A third runway at Heathrow brings greater benefits for passengers than any other option.

Greater choice of destinations

A third runway will provide up to 260,000 more flights each year including to 40 new destinations not served from London today. Because Heathrow has more long-haul business passengers, more transfer passengers and more freight than any other UK airport it will be able to add new routes faster.

Effect on average ticket price of capacity constraints at Heathrow



Greater choice of airlines

Many airlines want to fly to Heathrow but are unable to access slots because the airport's runways are full. Airlines that cannot fly to Heathrow do not automatically fly to another UK airport instead. Airlines like China Southern would have flown to the UK many years earlier if slots had been available, instead they flew to other European hubs, boosting the economies of our competitors.

Lower fares

Heathrow has been unable to add more flights for a decade but demand has continued to increase, pushing up prices. Research by Frontier Economics estimates that passengers travelling through Heathrow are already paying an average of £95 more for a return ticket than they would do if Heathrow had a third runway. In future un-met demand will be even greater. By 2030 the average return ticket price could be £300 less with an unconstrained Heathrow than with a two-runway Heathrow. The figures take into account the costs of building a third runway and show that the savings delivered to consumers by additional capacity are far greater than the costs of construction.





Easier access

For most people in the UK, Heathrow is closer to their home or business than other options considered by the Airports Commission. Passengers travelling to a three runway Heathrow will have a wide choice of transport options available, while any other option would need to develop new transport connections from scratch. Passengers at Heathrow will have the choice of Heathrow Express, Crossrail, London Underground, mainline rail, high speed rail or road transport to access the airport with a range of fares and service levels available.

Greater choice of flights from UK regions

Many passengers in UK nations and regions no longer have the choice of flying via Heathrow because domestic flights have been squeezed out as capacity has become constrained. Heathrow offers flights to seven UK airports while Amsterdam has routes to 24 UK airports. For some UK regions the only available option is to fly to Amsterdam. Spare capacity at Heathrow would increase competition giving UK passengers more choice, leading to lower fares and better service. We will establish a Taskforce for Regional Connectivity to Heathrow to develop proposals for how regional air links can be improved.



Best for the economy, jobs, business and exports

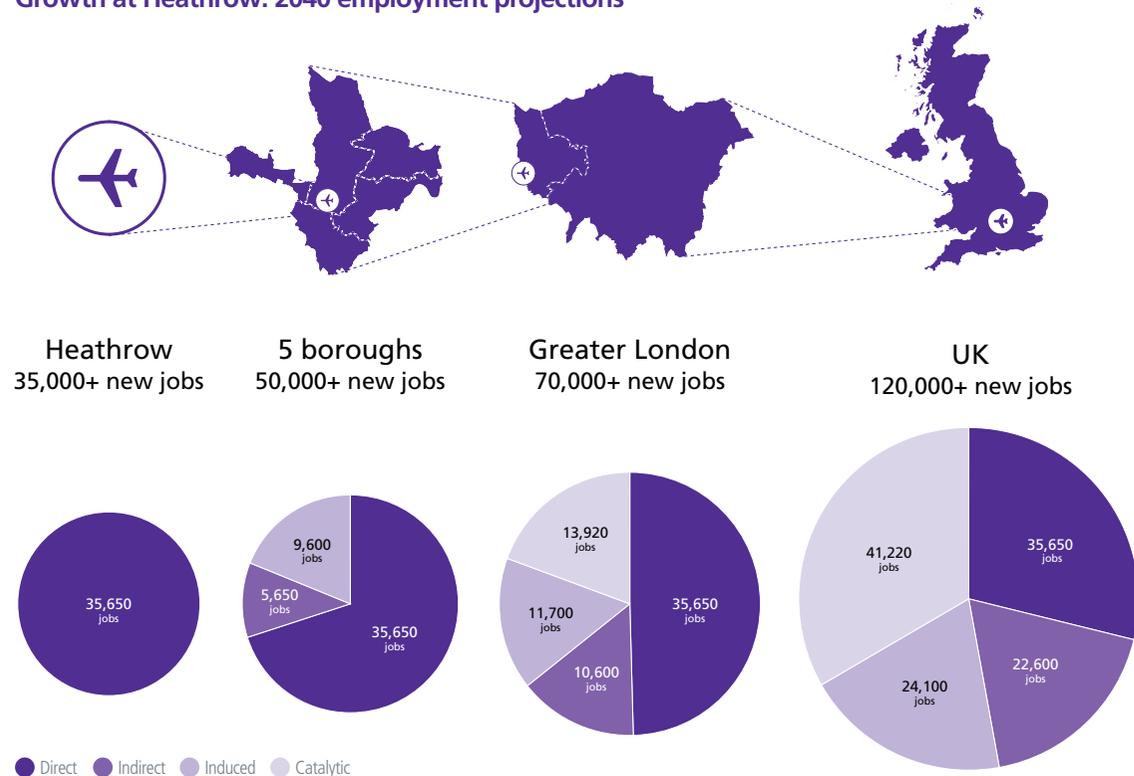
Heathrow is the best location for business

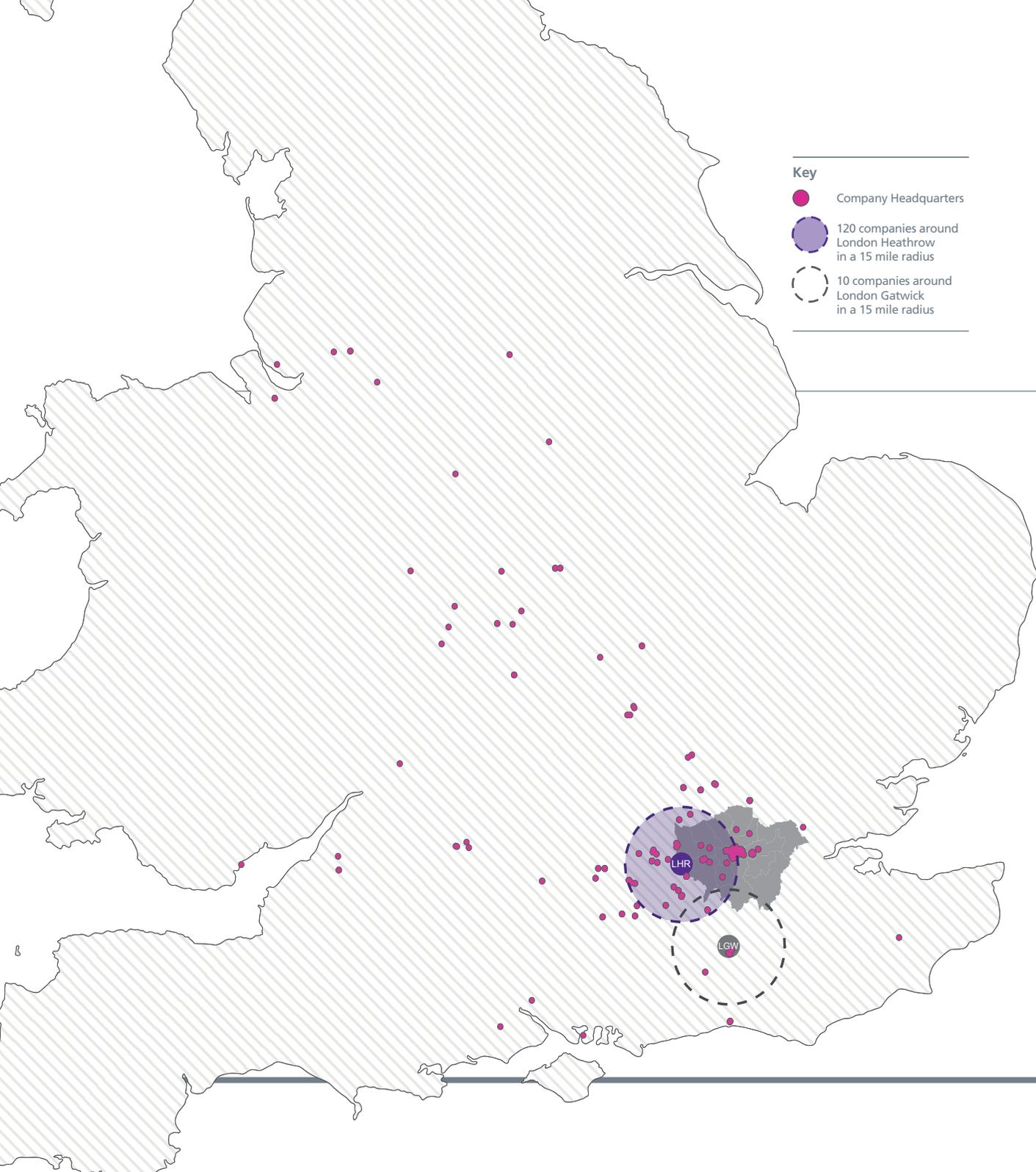
A third runway at Heathrow is the best option for UK business. It will serve more business passengers. The centre of economic gravity is to the west of London. 120 of the UK's top 300 company HQs are within a 15 mile radius of Heathrow compared to just 10 within 15 miles of Gatwick. The Thames Valley has 60% more international businesses than the national UK average, 100% more US businesses and 260% more Japanese businesses. Heathrow is in the best location for most UK companies. It will connect the UK to more fast-growing markets. It will support more inward investment. It will deliver more jobs, more trade and more economic benefits.

Heathrow will deliver UK economic benefits of at least £100 billion

A third runway at Heathrow would deliver greater economic benefits to the UK than any other option for new runway capacity. It will create jobs, facilitate trade and inbound tourism and boost spending in the wider economy.

Growth at Heathrow: 2040 employment projections





We estimate that benefits of at least £100 billion present value (PV) would accrue to the UK from expanding Heathrow. This is well above the wider economic benefits published for either Crossrail or HS2 and could be largely privately funded.

Heathrow is the best option to support freight exports

Heathrow is Britain's most important port. Air freight accounts for 40% (or around £400bn) of total UK imports and exports and most of it comes through Heathrow. Heathrow carries more freight exports and imports than every other UK airport combined. Low-cost airlines tend not to carry freight which is why Gatwick accounts for less than 5% of UK air freight. Freight helps make long-haul flights viable, with 95% carried in the hold of passenger aircraft. Within 20 years emerging markets will account for more UK exports than the EU. Air freight is critical in time sensitive industries such as pharmaceuticals, biotech and food – many of which are based to the west of London.

Best in any future scenario

Only Heathrow has a proven ability to deliver the flights Britain needs

A third runway at Heathrow will address the urgent need for hub capacity, while retaining flexibility in the London system to adapt to possible changes in aviation. The hub model has a proven ability to deliver the long-haul flights Britain needs. Hub airports meet the needs of network airlines – the only airline model which can provide daily flights to long-haul markets. It is the model our global competitors are investing in. The idea that point-to-point airports should be prioritized because hub airports will be less important in the future is not supported by the evidence. Long-haul flights have been tried from point-to-point airports without success.

New aircraft like B787s and A350s support the hub model

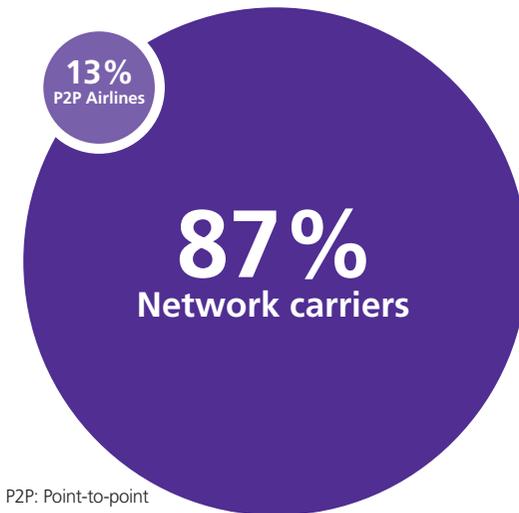
Some say that aircraft like B787s will change airline business models, and mean that hub airports will be less important in future. These new more efficient and longer range aircraft are important industry developments that allow people to travel further with less noise and fewer emissions.

But there is no evidence that they spell the end of the hub airport. 87% of orders for B787s are from network airlines operating from hubs. Heathrow has nearly ten times as many B787 departures than Gatwick. And the flights to Heathrow are to traditional long-haul business destinations, while the flights from Gatwick are to traditional long-haul leisure destinations such as Florida or the Caribbean. The aircraft might be more efficient but airlines still need to fill the seats to operate to long-haul destinations – and that means attracting transfer passengers through a hub.

Flying long-haul is still almost exclusively undertaken by network airlines operating at hubs

Ryanair and easyjet have recently placed orders for more than 300 aircraft, costing more than £15 billion. Not a single long-haul aircraft is among them. A number of airlines have tried to set up low-cost long-haul in the past and failed – including Laker Airlines in the 1970s, and AirAsia X, Hong Kong Oasis and Zoom in the last decade. Low-cost carriers are fundamentally different to network airlines – they carry very few transfer

87% of Boeing 787 orders are from Network airlines operating at a hub



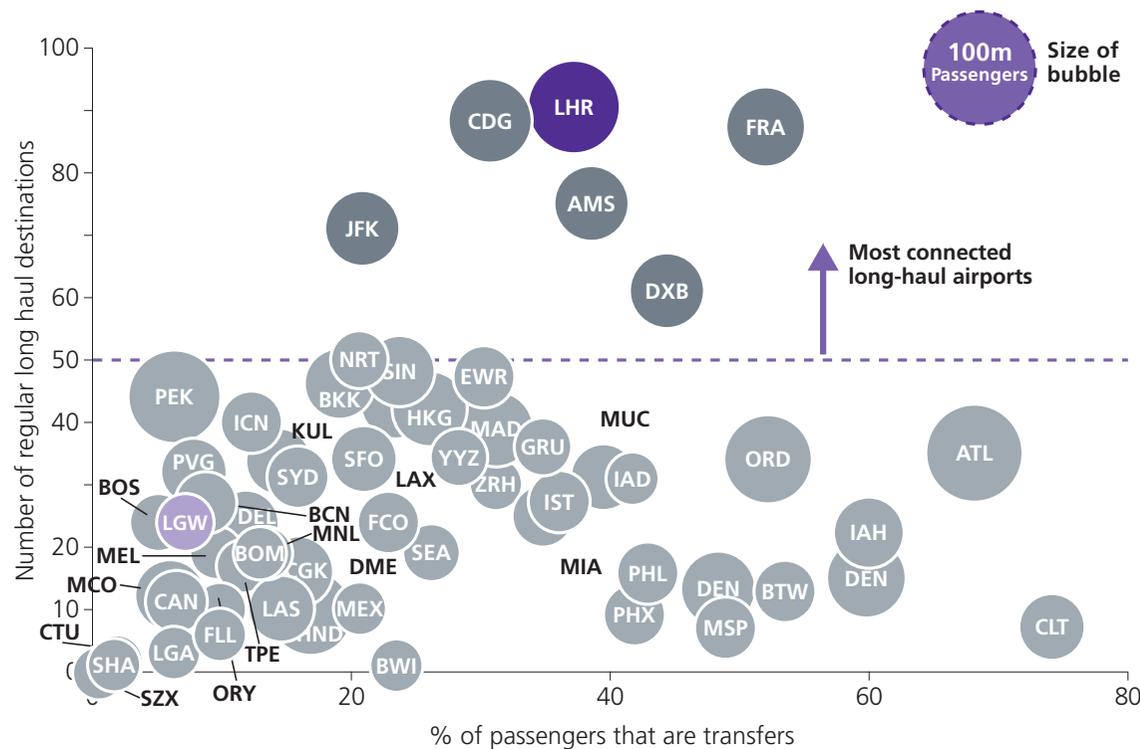
P2P: Point-to-point

passengers, no freight, and don't have business, first or premium cabins. These are all elements which are needed to make long-haul routes viable but which are not necessary on short-haul or seasonal leisure routes.

Today, because of Heathrow, the UK benefits from having more long-haul connections than almost any other country in the world. This is an advantage we can build on to have one of the world's most successful hub airports for the next 50 years. Or we can fail to expand Heathrow and see our European and Middle East competitors benefit from growth that could have come to Britain.



Only six airports in the world have more than 50 long-haul flights



The case for a third runway is robust in a wide range of future scenarios

Heathrow and Gatwick serve different markets, both important for the UK. The Airports Commission predicts there will be spare point-to-point capacity until 2040 whereas hub capacity is already exhausted. Adding a third runway at Heathrow would address the urgent need for hub capacity while still permitting growth in point-to-point flights and retaining flexibility in the London system to adapt to possible changes in aviation. Adding capacity only at Gatwick would do nothing to address hub capacity and would be a high-risk gamble on the idea that hub airports will be less important in future. If that assertion is wrong then constraining the UK's only hub could see Britain fall behind international competitors. Only a third runway at Heathrow will allow both hub and point-to-point flights to grow.

6

Listening to others to improve our plans

We have shared our proposals and listened to ideas for how we can improve them

Since the previous plans for a third runway were rejected in 2010 we have engaged with the public, businesses, passengers, airport users, statutory consultees and elected representatives to understand the issues that are important to them. We have received very useful feedback and suggestions to help us develop our plans.

We undertook a public consultation before refreshing our scheme

Once we were short-listed by the Commission in December, we launched a six week public consultation. This has allowed us to ensure that the public's views are fully reflected in our refreshed scheme design. We received 13,479 responses and more than a thousand residents attended 13 public exhibitions. Issues that were identified as most important included aircraft noise, periods of relief from noise, aircraft safety, air pollution, jobs, the economy and surface access.

People expressed a clear preference for a scheme that would continue to provide periods of relief from noise over a scheme that would not expose new people to noise but would end periods of relief from noise.

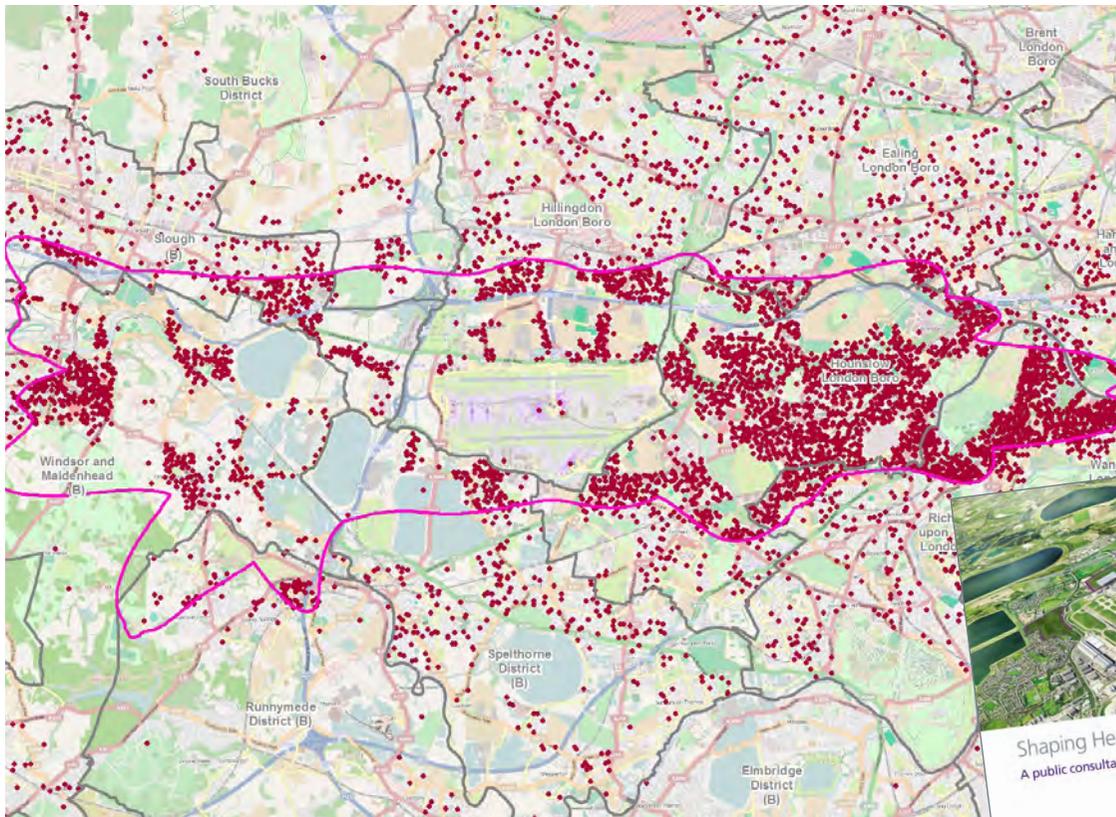
We have held events to understand business priorities

We have held events where we have listened to businesses from across the UK about our plans and sought advice. We were told to place greater emphasis on the importance of freight for importers and exporters. We were also asked to improve connectivity to the UK nations and regions to ensure a third runway would deliver benefits for the whole of the UK and not just the South East. We have also met with the CBI, BCC, IoD, Federation of Small Businesses and London First as well as Local Enterprise Partnerships.



We have listened to what passengers want

We have undertaken extensive research into what makes a great airport experience for passengers. Passengers want brilliant basics: safety, reliability, no queues, easy way finding and clean and functioning facilities. The best airports also offer a sense of care and ease; there are additional services available such as free wifi and first-class retail and courteous people to help with the journey. We have adapted our plans to focus on delivering a simpler journey for direct and transferring passengers, including easier connections and increased reliability.



We held a robust initial public consultation – respondents by postcode

- 13,500 responses
- 140,000 surveys sent to residents
- 13 public meetings
- Website, national and local media



6 Listening to others to improve our plans

We are working with airlines and other airport users

We have conducted extensive work with Heathrow's airlines on their priorities as part of the recent regulatory pricing review. We have also met individual airlines, each of the airline alliances, and airline representative bodies. Airlines want an operationally and commercially attractive masterplan that delivers additional capacity at a competitive price. Long-haul airlines need a strong local passenger catchment, and good transfer facilities, including for baggage and cargo. Enhanced resilience, reliability and flexibility are also airline priorities. Cargo companies have given us clear feedback about the need to expand and improve freight handling facilities.

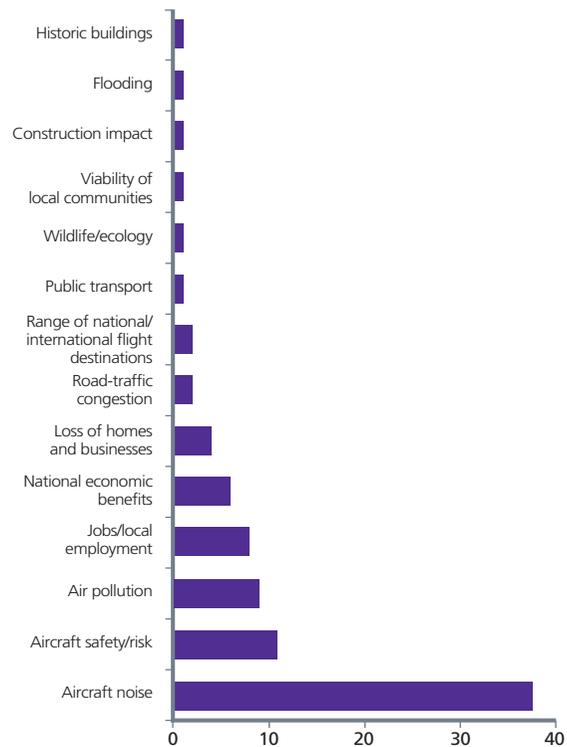


We have engaged with elected representatives and political parties and begun consultation with statutory bodies

We have had face to face meetings with MPs, Councillors and other elected representatives. We have attended the autumn and spring party conferences of the Conservatives, Labour, Liberal Democrats, SNP, Plaid Cymru, and UKIP to get feedback on our options. Priority issues raised include delivering jobs and economic benefits throughout the UK; supporting trade and exports; going further in reducing aircraft noise and installing noise insulation; providing more generous compensation schemes than in the past and improving surface access and regional connectivity. We have begun discussions with statutory bodies including the Environment Agency, Highways Agency, Natural England, Network Rail, and English Heritage. Issues that have been raised and reflected in our revised proposals include flood protection, potential disruption to the M25, and the impact on local historic buildings.



Most important issues from respondents



Source: Heathrow Airport Public consultation February/March 2014; ComRes

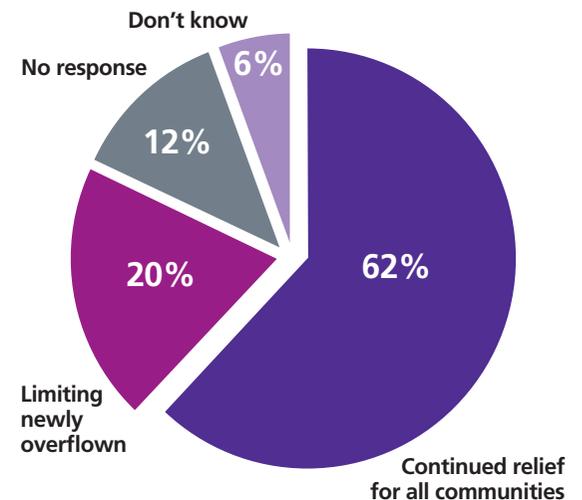
We have improved our plans in response and we are committed to further consultation

We now have a better understanding of the issues that are important to people and we have improved our plans in response. We have located the runway further south which reduces noise impacts and protects more homes and important heritage sites such as the Great Barn and St. Mary's Church in Harmondsworth. The number of people affected by significant noise will reduce by at least 12,000 compared to our submission last July. The number of properties requiring compulsory purchase has reduced by 200. The revised scheme also avoids the need to redevelop the M4/M25 junction.

We are grateful for the thousands of people who have taken the time to comment on our proposals. We are looking forward to receiving further feedback on our refreshed scheme design.

If our proposals are supported by the Commission and by Government in 2015 then there will be many opportunities to work with our stakeholders to further improve our plans. We will start by working with a panel of local community representatives to develop more detailed proposals for noise insulation and compensation before consulting on these in the summer.

What is your attitude to noise?



7

Our vision for a world-class hub

World-class passenger facilities

Our vision is for a world-class transport hub for the UK

Our vision is for Heathrow to be a globally competitive hub for the UK. Our masterplan will deliver a world-class hub in terms of passenger experience; transfer journeys; surface transport connections; resilience and reliability; and cargo and commercial facilities. Our masterplan prioritises periods of relief from noise for local communities and reduces noise, land take and impacts on local heritage buildings and motorways compared to our July 2013 proposal. It also sees the provision of new green spaces and flood protection for local communities.

Heathrow has world-class facilities upon which to build

We have spent £11bn transforming Heathrow over the last ten years. Heathrow is now rated by passengers as one of the top ten airports in the world, and Terminal 5 is rated as the world's best terminal. Terminal 3 and 4 have been extensively refurbished. In June our brand new £2.5bn Terminal 2 will open.

Heathrow will be safe, more reliable and resilient. We will eliminate routine aircraft stacks

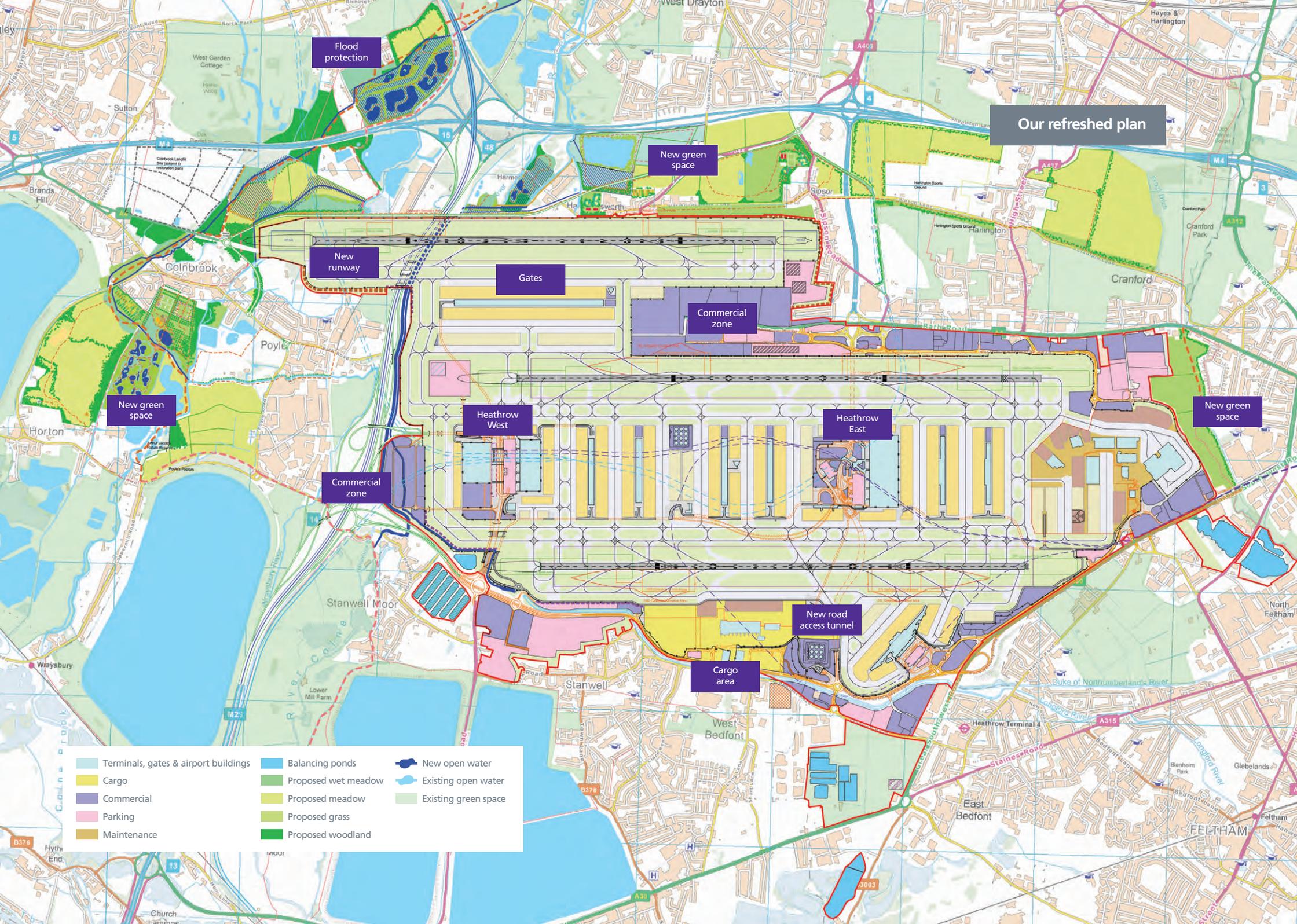
Airspace and airfield design will create a safe airport and increase punctuality, reliability and resilience. Our designs minimise the proportion of aircraft runway crossings compared to today by building taxiways around the end of runways. Aircraft deicing pads will be constructed at the end of every runway reducing delays in winter weather. We will eliminate the need for aircraft to routinely circle over London in stacks waiting



to land. Extra runway and terminal capacity will improve airport resilience during disruption. For example the temporary closure of one runway would reduce capacity by one-third rather than by one-half.

A global gateway of which Britain can be proud

We have a track record of working with leading architects and designers such as Richard Rogers, Norman Foster and Luis Vidal to create leading edge designs in T5 and T2. The monumental artwork 'Slipstream' is Europe's largest public sculpture and shows off British creativity, craftsmanship and engineering expertise to the world. Heathrow will be Britain's 21st century gateway to the world and the first impression of our country for arriving visitors. We would use the unique opportunity of a third runway to deliver a world-class airport of which the whole country can be proud.



Our refreshed plan

Flood protection

New green space

New runway

Gates

Commercial zone

New green space

Heathrow West

Heathrow East

New green space

Commercial zone

New road access tunnel

Cargo area

- | | | |
|--------------------------------------|---------------------|----------------------|
| Terminals, gates & airport buildings | Balancing ponds | New open water |
| Cargo | Proposed wet meadow | Existing open water |
| Commercial | Proposed meadow | Existing green space |
| Parking | Proposed grass | Proposed woodland |
| Maintenance | | |

7 Our vision for a world-class hub

Simple and seamless journeys

We have designed a single integrated airport campus

Our plan delivers one integrated airport with a consistently good passenger experience throughout. Rather than six terminals, our plans see the creation of two main passenger terminal and transport hubs as front doors for the airport: Heathrow West (Terminals 5 and 6) and Heathrow East (an extended Terminal 2). These main terminals and their satellite buildings will be connected by one underground passenger transit and baggage system. Heathrow will feel like a single integrated airport, creating simpler journeys for passengers.

We will deliver a simple and quick transfer experience

Our new terminal and baggage systems have been designed to improve transfers. The extension of passenger track transit and modern transfer baggage facilities will see minimum connection times between terminals reduce from 75 minutes to 60 minutes, and minimum connection times within a terminal reduce from 60 to 45 minutes. This will equal the best connection times offered by Amsterdam, Frankfurt and Paris.

We will design a fully-integrated passenger transport hub

Heathrow West and Heathrow East will provide direct terminal access to passengers from every mode of transport. They will be connected to the Underground network and have fast dedicated rail services to London provided by Heathrow Express. In 2019 Crossrail will link Heathrow to the City, Canary Wharf and East London. By 2021, Western Rail Access will provide fast direct services to the West and South Wales. Southern Rail Access will connect Heathrow to Waterloo and the South and South-West mainlines. In 2026 the new HS2 rail line will provide fast access to Heathrow from the Midlands and the North. Access to the M25, M4, M40 and M3 will all be improved.

Our proposals will improve traffic flow on the M25

A third runway at Heathrow provides an opportunity to redevelop one of the most congested sections of the M25. We have begun discussions with the Highways Agency to understand the opportunities. A new tunnelled

section of the M25 would be completed and opened before the existing route was closed. Our new proposal avoids the M25/M4 interchange and uses existing M25 junctions. We can construct the new section without reducing the capacity of the M25, and once complete our proposal would deliver new lanes which would allow drivers to bypass traffic leaving the M25 at Heathrow or the M4. This will segregate local and airport traffic from through traffic, improving capacity on the M25 and relieving congestion.





Heathrow West: A fully integrated transport hub

7 Our vision for a world-class hub

New cargo and commercial space

We will double the capacity of Heathrow's cargo area to support UK freight exports

Our plan for the redevelopment of Heathrow's airfield allows for the overhaul of Heathrow's cargo facilities. Our cargo facilities will be twice the capacity they are today (and more than 100 times the size of Gatwick's). This will allow for modern climate controlled cargo environments, improved transit facilities, and dedicated freight access points including the potential for a cargo railhead. Faster more efficient cargo movements at a hub will improve the UK's export competitiveness and maximise economic benefits.

"It is imperative that we recognise the inherent advantages Heathrow has as a world-class, global air freight hub and the unique benefits this brings not just to the South East of England but to Britain as a whole"

Ian Veitch, President, Freight Transport Association

A recent report from the Freight Transport Association, 'Sky High Value' contained case studies showing the importance of air cargo capacity to UK business:

Entertainment

Sound Moves is a specialist international logistics operation supporting bands on global tours. It ensures that equipment for artists such as Beyonce and U2 arrives at the next venue on time even if the journey spans continents. Tour principal John Corr says Heathrow is essential to their business, "It is no coincidence that suppliers to the music industry, as with other sectors such as motor sport, are clustered in the West London area. Heathrow's multiple daily departures for a huge number of destinations are crucial to the company meeting the ever tightening time pressure on tour schedules."

Retail

Asda supply chain manager Lee Hodgkin says "Asda uses air freight primarily when there is no other option. It is still important to us though that the inbound capacity and service levels from our key destinations are maintained at Heathrow. If capacity or investment levels at Heathrow fall we would have to examine the impact of that on our business very carefully."

Pharmaceuticals

A British manufacturer of diagnostic medical products explains how it relies on Heathrow to ship goods to hospitals all over the world on the day they are made. The logistics manager explains "Our products are used in scanning for, and treating, serious medical conditions. However, our products decay continually, so it is essential that we can make and ship the product on the same day a clinician orders it." The company sends 16,000 shipments a year through Heathrow to 54 countries.

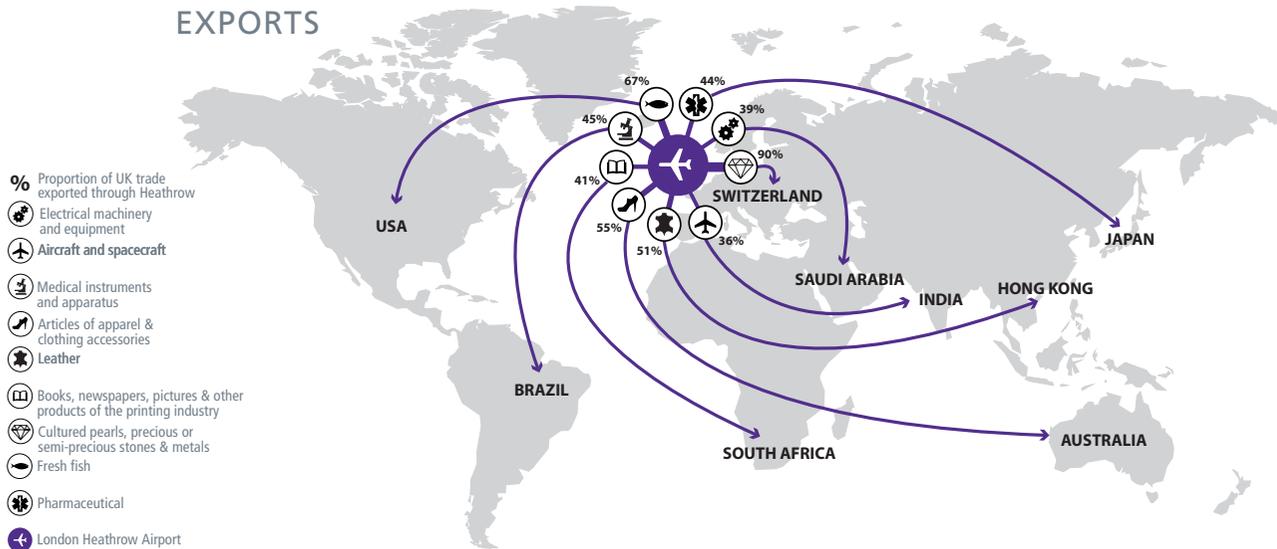
Heathrow's long-haul flights support important imports and exports

Location indicates predominant country of import or export

IMPORTS



EXPORTS



We will create opportunities for high-value commercial development

Our plans see land safeguarded for commercial developments such as office or hotel facilities. The Western terminal will need hotels to support around 70 million passengers per year. This is seven times the size of Terminal 4 which has its own dedicated hotel. Exhibition and conference centres could also be provided.

These areas can also provide prime locations for commercial premises that will be lost as a result of a third runway – such as British Airway's Waterside offices. Alternatively the area could be suitable for companies that place a high-value on mobility – such as professional services firms. These larger office complexes could incorporate smaller units let at competitive rates to encourage start-up businesses in order to support local investment and local jobs.

Other cities have harnessed the economic activity generated by their major airports successfully. These experiences, and continuing consultation with local and regional stakeholders, will inform our masterplan.

Less impact for communities and new green space

Locating the runway further south allows noise impacts to be minimised

By locating the third runway further south 12,000 fewer people are exposed to high levels of aircraft noise. In total at least 30% fewer people will be affected by significant aircraft noise than today. Our consultation showed local people have a preference for flights to be routed so that there are significant periods of relief from noise rather than an approach that does not expose new communities to noise but does not provide respite from noise.

Our revised location protects more homes and important heritage sites

Our revised third runway proposal means 200 fewer homes are within the airport boundary. It also provides the option of preserving the Grade I listed Harmondsworth Great Barn and the Grade II listed St Mary's Church in their current locations. Both are significant community and heritage assets. People may feel that moving the Great Barn to another location is a better option. We plan to consult on this point in more detail if Government supports our proposals.

New gardens, wetlands and woodland



1. Sports pitches
2. Formal gardens
3. Allotments
4. Visitor centre and cafe
5. Natural swimming pond and deck
6. Wet woodland
7. Wildlife ponds and wetlands

New green spaces and flood zone protection for communities

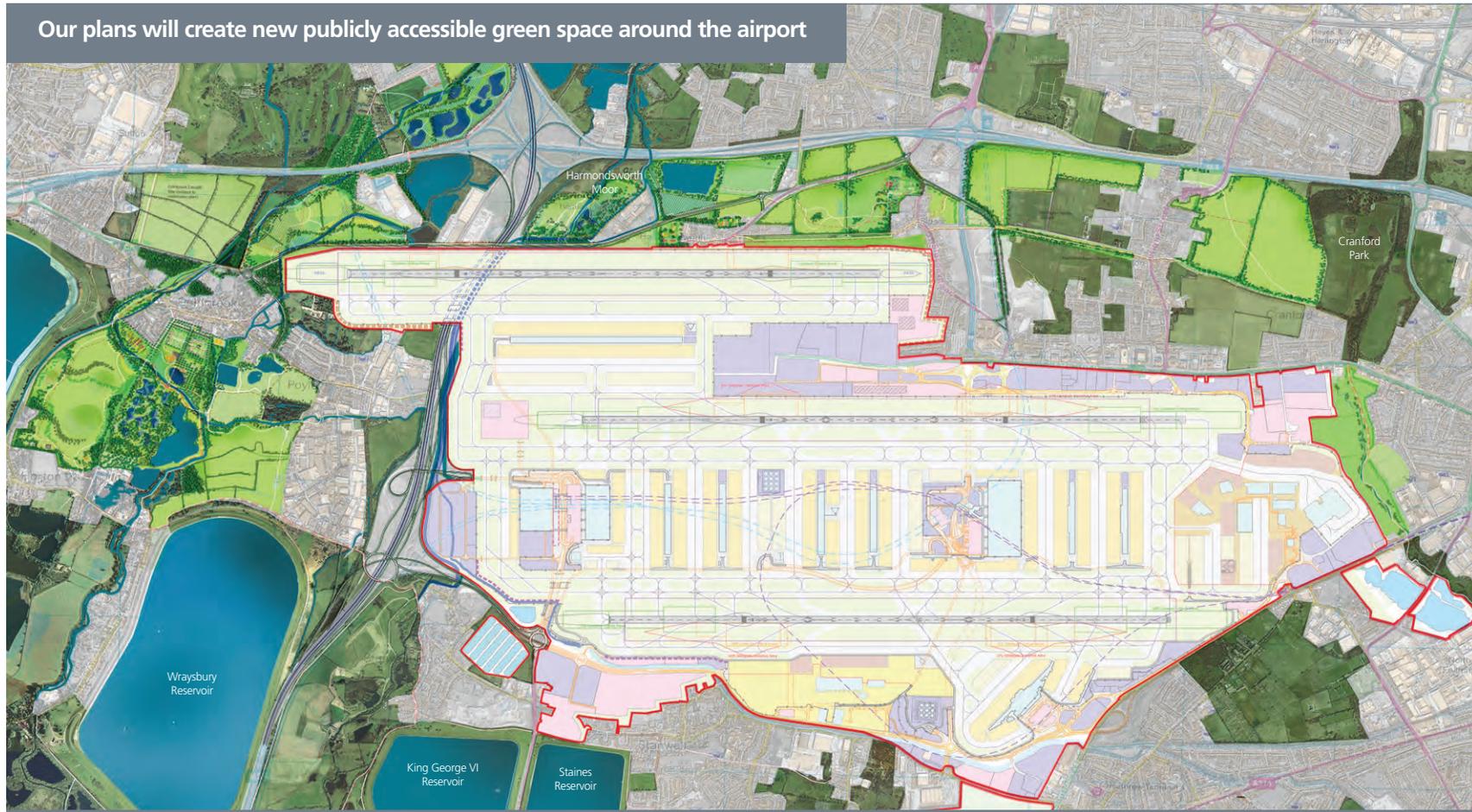
Our plans would increase the amount of publicly accessible green space around the airport. We have thought about how best to mitigate the effects of the development on local rivers and flood protection. We have produced a plan to enhance the quality of rivers, biodiversity and landscape in the Colne Valley. Our measures will protect people and properties against flooding offering the potential for an improved situation compared to today, particularly for the residents of Colnbrook and Poyle. We will also create new green corridors that link together existing outdoor recreation areas such as those in the existing Colne Valley Regional Park. Other flood prevention measures will be introduced for other local communities.



Key

- New green space
- Existing green space

Our plans will create new publicly accessible green space around the airport



7 Our vision for a world-class hub

Capacity for Britain to compete and win

A third runway provides enough capacity for the foreseeable future

The 740,000 flights that an expanded Heathrow would deliver would maintain the UK's aviation hub status for the foreseeable future. Heathrow could compete effectively with other hubs around the world. Paris, Frankfurt and Amsterdam

currently have capacity for around 700,000 flights a year. Our masterplan would give us enough runway, terminal and cargo capacity for Britain's hub to compete and win. We would have better passenger terminals, better surface access and a better transfers experience.

Not just a short-term fix

Our proposal provides sufficient capacity until at least 2040. Beyond this it is impossible to accurately predict demand. We have therefore designed our proposals so that a fourth runway could be added if it were ever needed.

Hub airport	Flight capacity	Flights today	Percentage full
Heathrow (two runways)	480,000	472,000	98%
Heathrow (three runways)	740,000	472,000	64%
Paris	700,000	514,000	73%
Frankfurt	700,000	487,000	70%
Amsterdam	650,000	437,000	67%

ACI data. Some airports have a greater theoretical capacity with four runways but are constrained by planning or noise caps





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Check-in information

Destination	Time	Status
London	10:00	On Time
Paris	10:30	Delayed
Amsterdam	11:00	On Time
Brussels	11:30	On Time
Frankfurt	12:00	On Time
Munich	12:30	On Time
Berlin	13:00	On Time
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Berlin	13:30	On Time
Cologne	14:00	On Time
Düsseldorf	14:30	On Time
Dortmund	15:00	On Time
Leipzig	15:30	On Time
Dresden	16:00	On Time
Hamburg	16:30	On Time
Bremen	17:00	On Time
Stuttgart	17:30	On Time
Munich	18:00	On Time
Frankfurt	18:30	On Time
Berlin	19:00	On Time
Cologne	19:30	On Time
Düsseldorf	20:00	On Time
Dortmund	20:30	On Time
Leipzig	21:00	On Time
Dresden	21:30	On Time
Hamburg	22:00	On Time
Bremen	22:30	On Time
Stuttgart	23:00	On Time
Munich	23:30	On Time
Frankfurt	00:00	On Time
Berlin	00:30	On Time
Cologne	01:00	On Time
Düsseldorf	01:30	On Time
Dortmund	02:00	On Time
Leipzig	02:30	On Time
Dresden	03:00	On Time
Hamburg	03:30	On Time
Bremen	04:00	On Time
Stuttgart	04:30	On Time
Munich	05:00	On Time
Frankfurt	05:30	On Time
Berlin	06:00	On Time
Cologne	06:30	On Time
Düsseldorf	07:00	On Time
Dortmund	07:30	On Time
Leipzig	08:00	On Time
Dresden	08:30	On Time
Hamburg	09:00	On Time
Bremen	09:30	On Time
Stuttgart	10:00	On Time
Munich	10:30	On Time
Frankfurt	11:00	On Time
Berlin	11:30	On Time
Cologne	12:00	On Time
Düsseldorf	12:30	On Time

8

Connecting all of the UK

Heathrow is already the UK's best connected transport hub

Heathrow is already the UK's best connected transport hub. It has the only dedicated non-stop express airport rail link in the UK. It has the UK's busiest bus and coach station. It is the only airport with a London Underground connection. It is the best connected airport to the strategic road network with the M25, M4, M40, M3 and M1 motorways all within close proximity. Our plans will place Heathrow at the heart of the UK transport system with a total population of 12 million within 60 minutes of the airport.

Our vision is to connect Heathrow to every economic centre in the UK

Heathrow is the UK's global gateway and our ambition is to connect it to every part of the UK. We will work with Government, airlines and Network Rail to connect every nation and

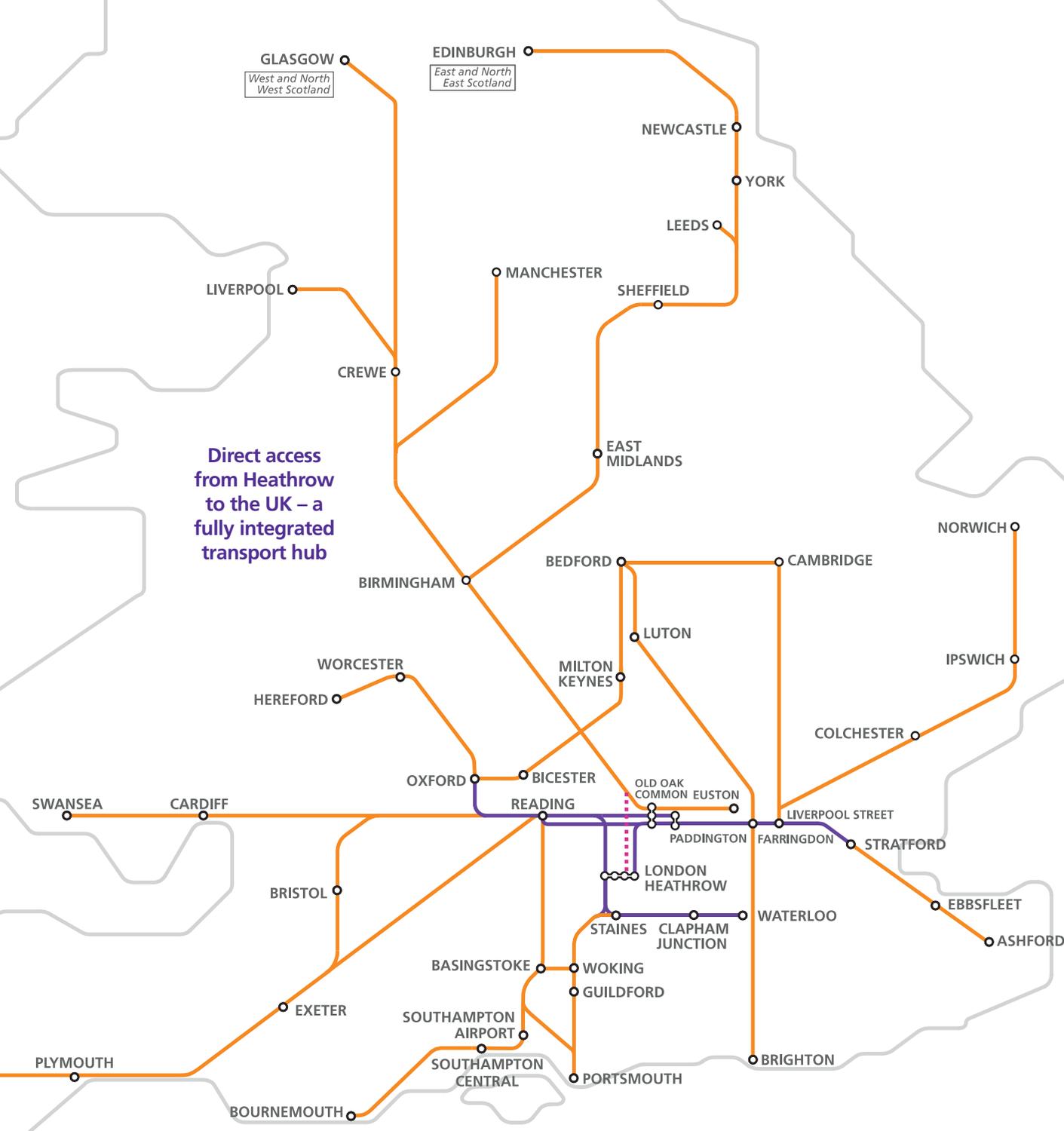
region to global markets, bringing the benefits of additional trade, tourism and economic growth to the whole country. Schemes like HS2 and Western Rail Access will make the North, Midlands, South Wales and the West of England more attractive locations for international business because of their links with a global hub airport. Passengers boarding a train at Sheffield or Manchester could be dropping bags off for their flight at Heathrow 90 minutes later.

Providing connectivity by air to Heathrow from the nations and regions of the UK is equally important. We will establish a Taskforce for Regional Connectivity to Heathrow to develop policy proposals and recommendations for access to an expanded Heathrow. Representatives from politics and business from across the UK will be invited to support the Taskforce ensuring that the benefits of a third runway at Heathrow are felt throughout the country.

Train and seat capacity forecasts (per hour)

Service	2013		2030		2040	
	Trains	Seats	Trains	Seats	Trains	Seats
Heathrow Express	4tph	1,816	4tph	1,816	4tph	1,816
Crossrail/Connect	2tph	620	6tph	2,700	8tph	3,600
Piccadilly Line	12tph	2,736	18tph	4,536	18tph	4,536
Western Rail Access	-	-	4tph	1,816	4tph	1,816
Southern Rail Access	-	-	4tph	1,920	6tph	2,880
Total	18tph	5,172	36tph	12,798	40tph	14,648

tph: Trains per hour



Direct access from Heathrow to the UK – a fully integrated transport hub

Key

- Direct connection
- Onward connection
- ⋯ Future opportunity
- East Onwards connections

Major new public transport schemes are already committed for Heathrow

New rail services to the North, East, South and West are due to be delivered by the time a new runway becomes operational. Heathrow's rail capacity will treble from 5,000 to nearly 15,000 seats per hour or from 18 to 40 trains per hour. Improvements include Crossrail, the Piccadilly Line upgrade; Western Rail Access; Southern Rail Access; and HS2. We will also introduce new and enhanced bus and coach services, building on the 540,000 annual movements today.

In total 30 million more passengers will travel by public transport

New public transport infrastructure could enable 30 million more passengers to use public transport to access Heathrow by 2030. This could increase Heathrow's public transport mode share from 40% today to more than 50% in 2030 and 55% by 2040 when 50 million passengers will use public transport to access the airport.

8 Connecting all of the UK

We believe there is a case for introducing a congestion charging zone

Once public transport improvements have been delivered, we believe there is a case for reducing vehicles journeys to Heathrow by introducing a new congestion charge zone. This would improve air quality and reduce congestion while raising money for public transport improvements. The charge would discourage passengers from using cars and subsidise public transport for those who adopt more sustainable travel plans. The charge would only apply to those travelling to the airport – not those using surrounding roads like the A4, A30, M4 or M25. We envisage that there could be exemptions in place for the greenest vehicles, the local community and for taxis. Funds could be ring-fenced to pay for transport schemes and local community improvements. Heathrow will be able to deliver more flights without increasing the traffic on the road due to the airport.

Our proposals increase transport resilience and choice

Heathrow’s public transport and highway improvements will increase transport resilience and give passengers choices. Five different railway lines and five different strategic highways will serve Heathrow. We will also add a new road access tunnel from the south. Heathrow Express, Crossrail, Southern Rail Access & Piccadilly Line will provide passengers travelling to/from London with unrivalled choice.

We will encourage more sustainable travel by employees

Public transport improvements will be complemented by a range of measures to encourage more sustainable travel by airport employees. These include expanding Heathrow’s employee car share scheme (already the world’s largest), but also reducing the number of employee car parking spaces. We plan on extending the existing airport travelcard to provide subsidised public transport to airport employees. This will support an employee public transport mode share of 50%.

Journey times by rail to key UK cities

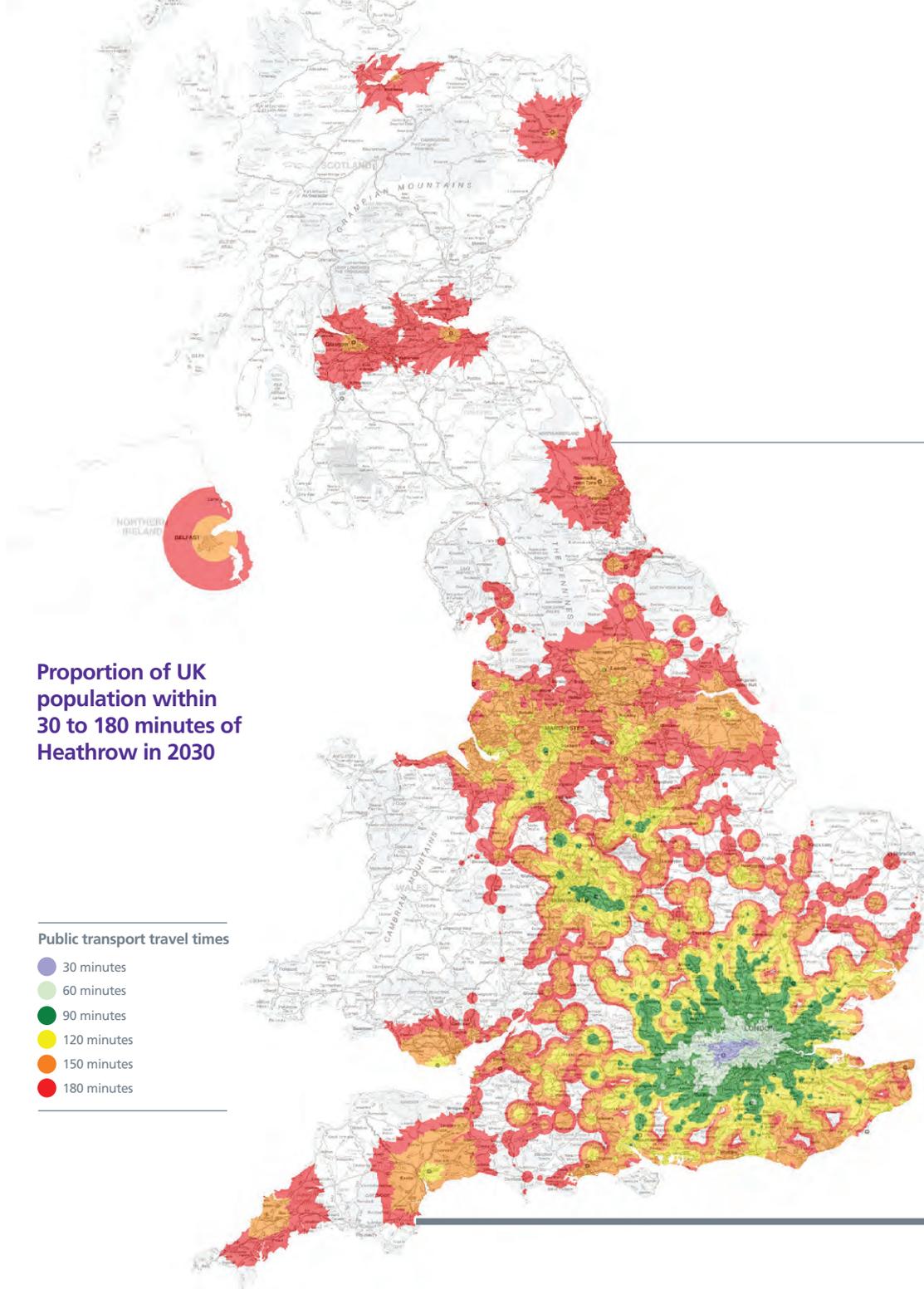
Station	2013		2032*	
	Journey time	Interchanges	Journey time	Interchanges
Birmingham	2 hours 31 minutes	2	53 minutes	1
Bristol	2 hours 05 minutes	1	1 hour 40 minutes	1
Cardiff	2 hours 35 minutes	1	1 hour 58 minutes	1
Leeds	3 hours 46 minutes	2	1 hour 38 minutes	1
Liverpool	3 hours 29 minutes	2	1 hour 48 minutes	1
Manchester	3 hours 16 minutes	2	1 hour 23 minutes	1
Newcastle	4 hours 01 minute	2	3 hours 07 minutes	1
Sheffield	3 hours 32 minutes	2	1 hour 25 minutes	0

*Assuming Crossrail, Western Rail Access, Southern Rail Access and HS2 via Old Oak Common

Proportion of UK population within 30 to 180 minutes of Heathrow in 2030

Public transport travel times

- 30 minutes
- 60 minutes
- 90 minutes
- 120 minutes
- 150 minutes
- 180 minutes



We will develop a new freight cargo consolidation centre

We will develop a new cargo consolidation centre to reduce freight deliveries and HGV movements to and from the airport. We will also look at whether there is a case for connecting the cargo centre to the rail network. We will work with industry to deliver more efficient use of vehicles and a cleaner vehicles fleet.

Heathrow will be a fully integrated transport hub

The transport improvements already committed plus those we have planned can transform Heathrow into a fully integrated national transport hub that offers connectivity benefits for the local area and the rest of the UK. Heathrow will be a vital cog in national transport and provide new direct transport links for local communities.

9

A new approach to sustainability

The lowest noise levels since the 1970s

A third runway should only go ahead within environmental limits

People have legitimate concerns about what the environmental impact of a new runway would be. A third runway should only go ahead within strict environmental limits on noise, local air quality and within the UK's climate change targets.

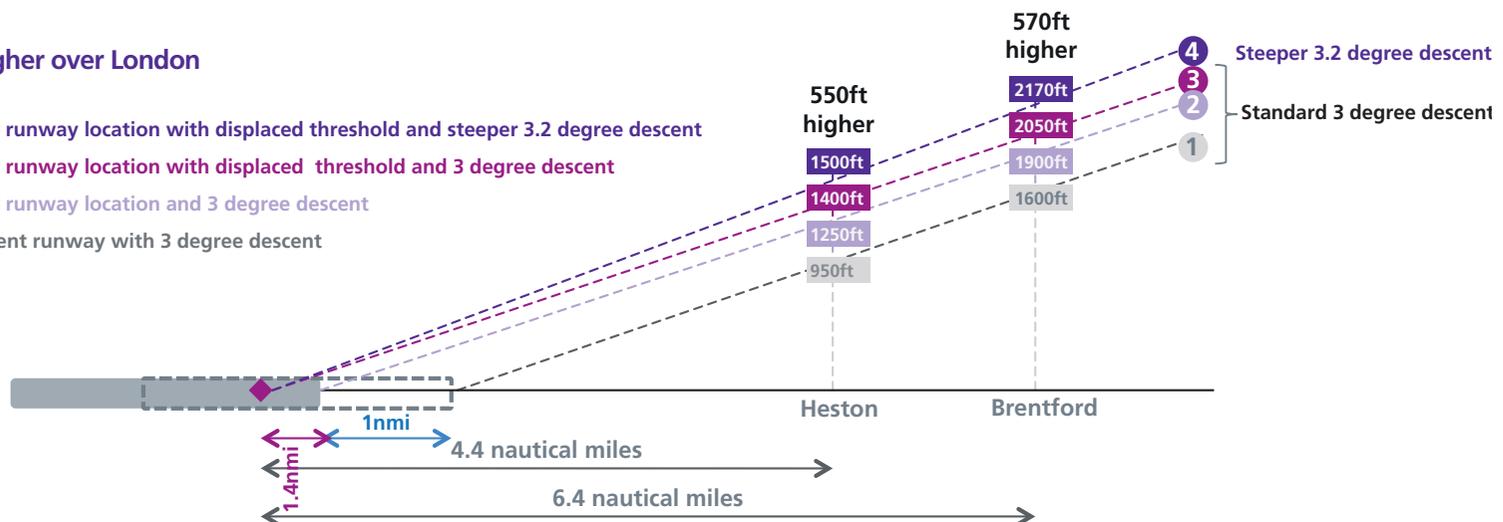
There isn't a choice between more flights or less noise

There isn't a choice between more flights or less noise. Heathrow can deliver both. Heathrow is significantly quieter than it was in the past. Since the early 1970s both the area and the number of people within Heathrow's noise footprint have fallen around tenfold, despite the number of flights doubling. Our proposals for a third runway

at Heathrow will see noise reductions continue. Even with a third runway, we estimate that in 2030 there will be at least 30% fewer people in total within Heathrow's noise footprint than today. This is based on the Government's preferred 57dBA Leq noise measurement. Using the 55db Lden measurement preferred by European policymakers would deliver a reduction of about 45% in the number of people exposed

Aircraft will fly higher over London

- ④ Approach for new runway location with displaced threshold and steeper 3.2 degree descent
- ③ Approach for new runway location with displaced threshold and 3 degree descent
- ② Approach for new runway location and 3 degree descent
- ① Approach for current runway with 3 degree descent





to noise. In addition, there would be a 60% reduction in the number of people exposed to night noise. This would deliver the lowest noise levels around Heathrow since the 1960s.

A new runway location and landing approaches to reduce noise

Our proposal sites a third runway one nautical mile further to the west than the previous proposal for a short third runway. Every mile further west an aircraft lands means it is flying approximately 300 feet higher over London on its landing approach. We plan to use steeper landing approaches and have aircraft touch down 700 metres further along all runways than they do today. This will mean that aircraft will be flying higher as they approach Heathrow, reducing noise impacts for all local communities.

Quieter aircraft

We charge noisier aircraft more to land at Heathrow and quieter aircraft less. We propose a phasing out of the noisiest aircraft (known as Chapter 3) and no Boeing 747-400 aircraft by the time a new runway opens. 90% of aircraft at Heathrow will be 'next generation' technology

like the Airbus A380, Boeing 787 and Airbus A320 NEO by the time the new runway opens. We also support the introduction of 'green slots' where new capacity is only given to airlines willing to operate quieter aircraft.

Difference in population inside the Heathrow noise contour in 2030 compared to 2011

Airspace redesign option	Contour boundary	Difference in population inside noise contour in 2030 relative to 2011
Minimise the total number of people overflown	55 Lden	-48%
	57 LAeq	-35%
Minimise the total number of new people exposed to noise	55 Lden	-45%
	57 LAeq	-31%
Maximise the periods of predictable noise relief for people	55 Lden	-46%
	57 LAeq	-31%

There are different options for redesigning airspace

Adding a third runway at Heathrow would require airspace to be redesigned. This would include the redesign of arrivals and departures flight paths for Heathrow. The main objective when redesigning airspace would be to minimise and where possible reduce the impact of noise. However, there are choices in how airspace could be redesigned to achieve this objective. The table to the left illustrates how many people would be affected by noise compared to 2011 if airspace was designed in three different ways.

While we recognise that determining which approach should be pursued is ultimately a matter for Government we believe that maximising periods of noise relief offers clear advantages. This approach would cut the number of people inside the noise contour by at least 30% while delivering the periods of relief from noise which people expressed a clear preference for in our recent consultation.

New noise insulation and fair compensation

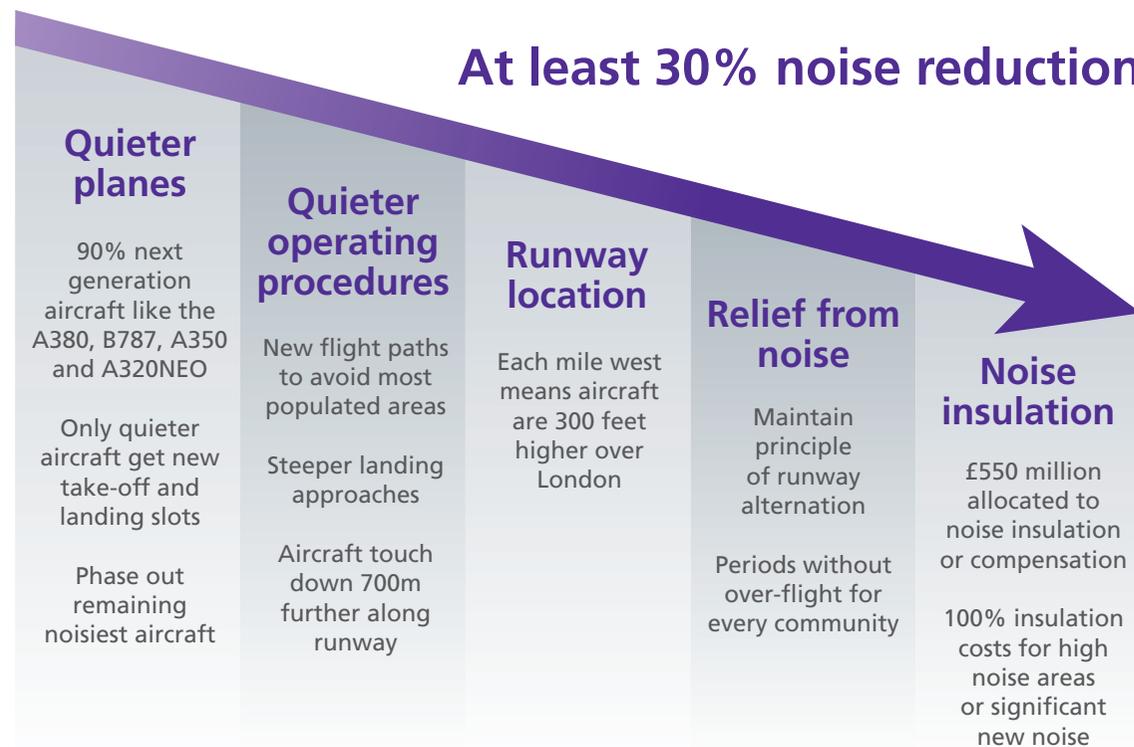
Periods of respite from noise for every community

In contrast to the previous proposal for a short third runway we have maintained the principle of runway alternation. This provides periods of respite from noise for all communities around Heathrow. Our consultation showed local people have a preference for airspace to be designed so that there are significant periods of relief from noise. People consider this to be a more important consideration than exposing people to noise for the first time.

We are not proposing extra night flights, and there will be fewer night flights on existing flight-paths

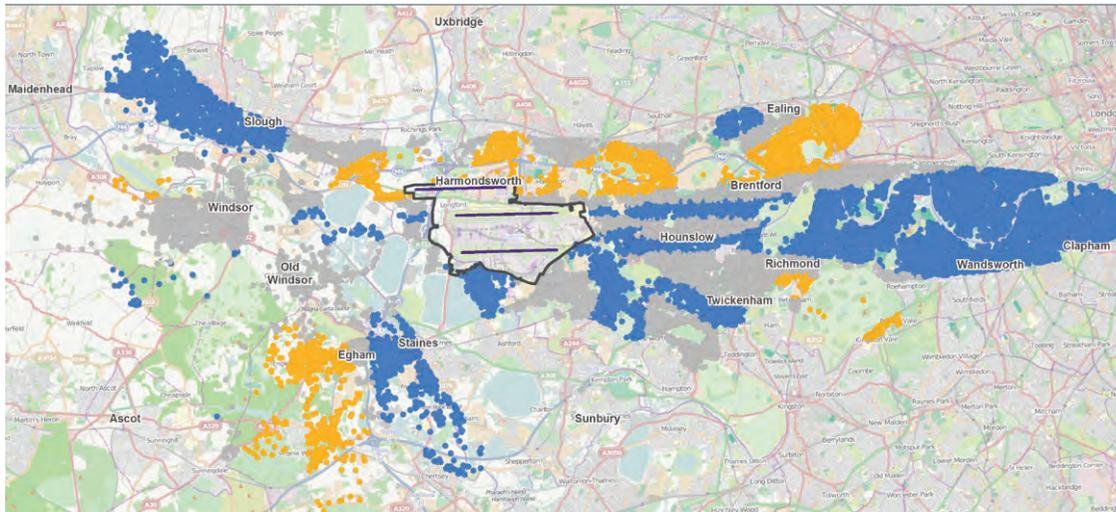
Night flights are an important part of operations at a hub airport but also a significant concern for local residents. Of the major European hub airports, Heathrow has the strictest limits on operations between 11pm and 6am and the fewest flights. Our plans do not propose any extra night flights and would reduce the number of night flights on existing flight-paths. Because we are proposing to rotate use of the runways at night.

Five steps to reduce aircraft noise



Key

- Noise increase
- No significant change
- Noise decrease



Noise impacts of our proposal when we maximise noise relief for people overflow in the 57dBA Leq contour

This means that residents under existing flight-paths would have night flights only every third week rather than every other week at the moment. This means that areas such as Richmond would experience fewer night flights with a third runway than today.

New noise insulation and compensation

Heathrow currently operates one of Europe's largest noise insulation schemes. More than

40,000 properties are eligible for some form of noise insulation. In areas of high noise or in areas experiencing a significant increase in noise we believe that free noise insulation should be offered to residents. Over the last 20 years Heathrow has spent £30m on insulating homes, schools and community buildings from noise. Our previous proposal for a third runway allocated £90m for noise insulation. Now, we are proposing a £250m fund to pay for free noise insulation and



compensation for people in high noise areas if a third runway goes ahead. We will now work with a panel of local community representatives to develop more detailed proposals for noise insulation and compensation before consulting more widely in the summer.

A fair property compensation scheme

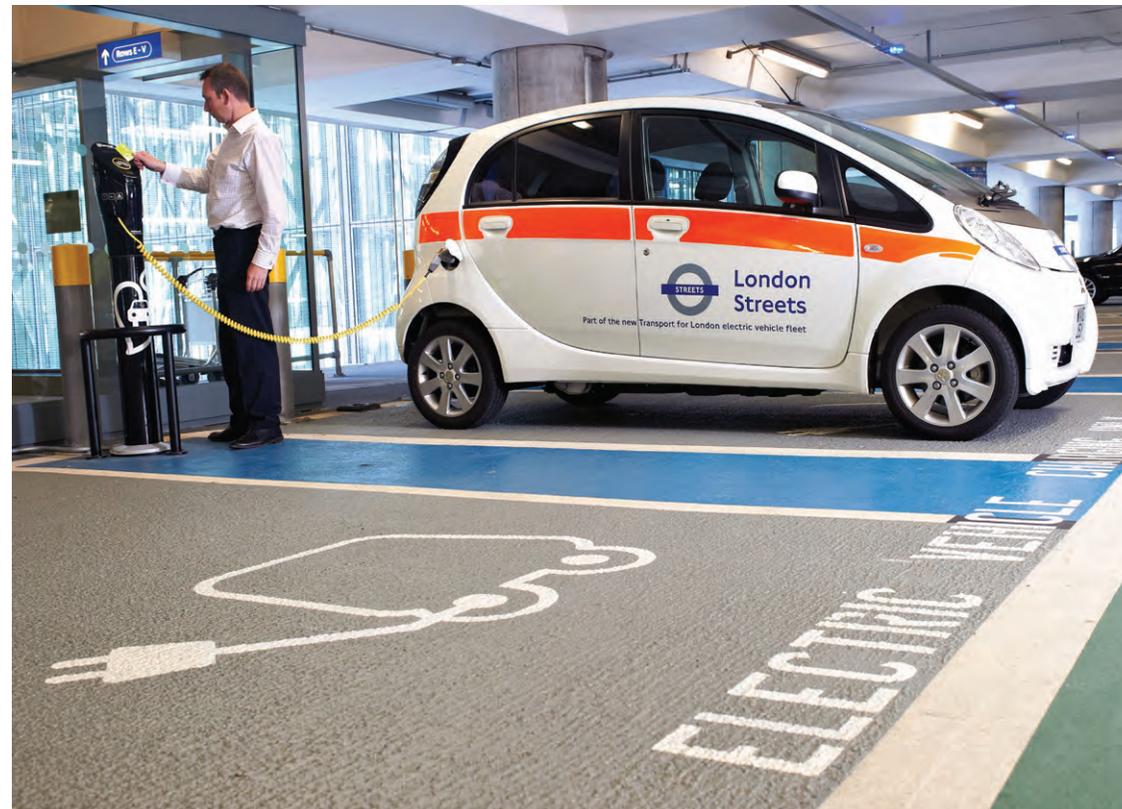
We are committed to treating those most affected by a third runway fairly. We recognise that the compulsory purchase of 750 homes is a significant undertaking and that such circumstances deserve exceptional compensation for residents. We are proposing that anyone whose home needs to be compulsorily purchased will receive 25% above unblighted market value compensation plus legal fees and stamp duty costs on their new home. We will be asking for further views on whether this represents a fair package of compensation in our consultation. For the houses lost to the airport development, we will help fund replacement housing schemes within land already earmarked for development by local authorities.

9 A new approach to sustainability

Better air quality than today

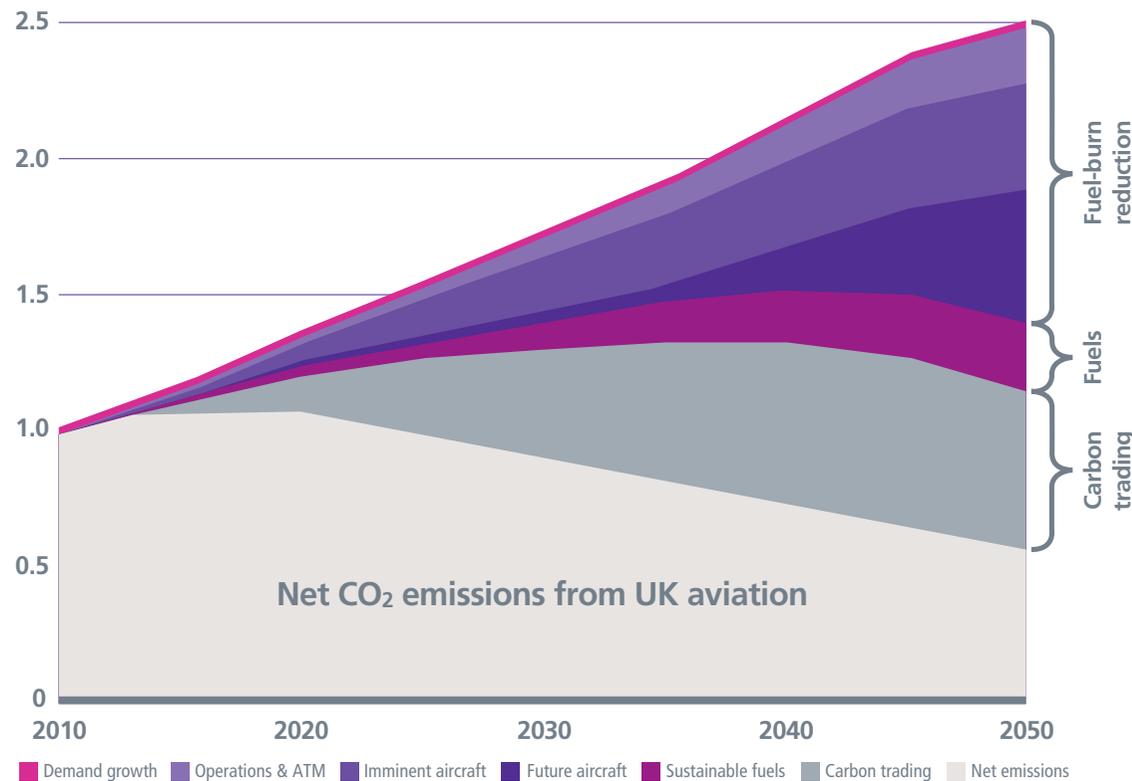
Better air quality than today

We can add capacity at Heathrow while meeting all air pollution limits. New public transport options will provide an alternative to travelling to the airport by road. A congestion charge would provide a new mechanism for managing demand and ensuring there will be no more Heathrow-related vehicles on the roads than today. Those vehicles that are travelling to the airport will be cleaner. Combined with new aircraft technology this means that levels of nitrogen dioxide (NO₂) would be within EU limits. Levels of fine particles (PM₁₀ and PM_{2.5}) are already within the limits and would continue to be with a third runway. We will operate a Clean Vehicles Programme to promote low and zero emissions vehicles among airport companies. In addition, we host the UK's first publicly accessible hydrogen refuelling site and are increasing the number of electric vehicle charging points at our passenger car parks.





The number of flights from UK aviation can increase without substantially increasing emissions



We will cut carbon emissions from airport energy use by 60% compared to today

The Airports Commission's interim report and the Committee on Climate Change have found that a third runway is compatible with the UK meeting its climate change reduction targets. We are also committed to making the construction and operation of a third runway as low carbon as possible. The airport in 2030 will produce 60% less carbon from energy use compared to 2010. This will be achieved by a combination of technologies including ground source heat pumps, thin film photovoltaics, and combined heat and power.

A resource efficient airport

We have set tough environmental targets for a third runway. This means that compared to today the airport will consume less water, and result in less waste per passenger with over 80% of waste recycled. This will be achieved by investing in new technologies and practices that increase the efficiency of the airport.

10

The deliverable solution

Financeable and affordable

A third runway is financeable, affordable and deliverable

Heathrow offers the fastest, most cost effective and most practical route to delivering new hub capacity. Costs are estimated at £15.6bn, of which £11.1bn is airport infrastructure, £0.9bn is surface access, and £3.6bn is community compensation and environmental mitigation. The £15.6bn would be privately funded. Government support for other surface access improvements would be required and this is currently estimated at £1.2bn. The illustrative business case that we have submitted to the Commission shows passenger charges rising from £20 to £24 when a third runway is operational.

Indicative costs for North-West third runway option

	May 2014 proposal
Airport infrastructure Includes runway, taxiway, apron, aircraft stand, terminal capacity and pier, tracked transit, baggage system, access road, car park and control tower costs	11.1
Surface access Includes road, highway, motorway, and rail costs	0.9
Environmental Includes re-provision of wildlife habitat and flood mitigation	
Community Includes residential property, commercial property, and general land compulsory purchase, community facilities re-provision, community infrastructure levy, and air noise compensation costs	3.6
Total	£15.6 billion

There is a strong underlying business case and clear airline demand

For any airport development to be privately funded there must be a clear business case for investors. The total cost of new infrastructure, the complexity of construction and the uncertainty of future demand are all factors that affect risk for investors. Heathrow has a strong passenger and airline base from which to build a business plan. Demand for landing slots already outstrips supply, with airlines paying millions of pounds to trade slots. Airlines express a strong preference for additional capacity to be at Heathrow. There is also a strong local passenger catchment area and a large number of passengers already using the airport.



A third runway is privately financeable with the right regulatory regime

Heathrow is the largest 100% privately funded airport in the world with a track record of financing major infrastructure such as the £11bn investment which includes Terminal 5 and Terminal 2. With an asset base of more than £14bn and £2bn in revenues, Heathrow is uniquely well positioned to fund a new runway. Our shareholders include three of the world's top five sovereign wealth funds, lead with UK and international pension funds, and the world's largest private infrastructure fund. Heathrow has a well-established and resilient financing platform and an investment grade credit rating. A fair regulatory framework with an attractive and predictable cost of capital is critical to a privately funded business case.

A third runway is affordable for airlines, passengers and the UK

Heathrow expansion will reduce costs for passengers. By 2030 the average return ticket price could be £300 less with an unconstrained Heathrow than with a two-runway Heathrow. This figure takes into account the costs of building a new runway. Any scheme must be commercially viable for airlines and offer airport charges that are competitive with other European hubs. Airlines have a choice of airports and aircraft are highly mobile assets. Passenger demand will be weakened if prices are too high. We are committed to working with airlines to minimise costs and develop a tariff path that is affordable. Our illustrative business case suggests that airport charges could average at £24 in Q8 (2024-28) compared to an average of around £20 in the current regulatory period. We plan to work with airlines on alternative funding models that may make new capacity more affordable for passengers, airlines and the airport.

Deliverable by 2025

A third runway is deliverable by 2025

Moving the runway further south avoids the need to rebuild the M4/M25 junction, cutting the time taken to deliver a third runway. If Government takes a clear policy decision after the Commission reports then planning consent can be delivered by 2019, with the first flights using a third runway in 2025. This is nine years earlier than a Thames Estuary hub could open and as quick as a second runway at Gatwick. Any delay is critical because the UK is already losing more than £14bn a year in trade due to constraints at Heathrow. Every year of delay risks the UK falling behind. An end to the political indecision that has beset aviation policy for decades is essential for delivering the hub capacity Britain needs.



Our procurement strategy will deliver benefits throughout the UK

A third runway would be the UK's largest privately funded construction project. Tens of thousands of people will work on the project starting from before 2020. Creating jobs in the UK and investing in the skills and training of the people who do them is a responsibility we take seriously. Heathrow has a track record of working with our supply chain to ensure that the benefits of major construction accrue to the whole of the UK. As with the Terminal 2 and Terminal 5 programmes, firms from every region would be involved. In many cases, the project will have a lasting impact on businesses because of the new investment in staff, skills, knowledge and equipment it will support. A third runway would be great news for people in construction and engineering firms throughout the UK.

Heathrow has a proven ability to build safely, on time, on budget, and with quality

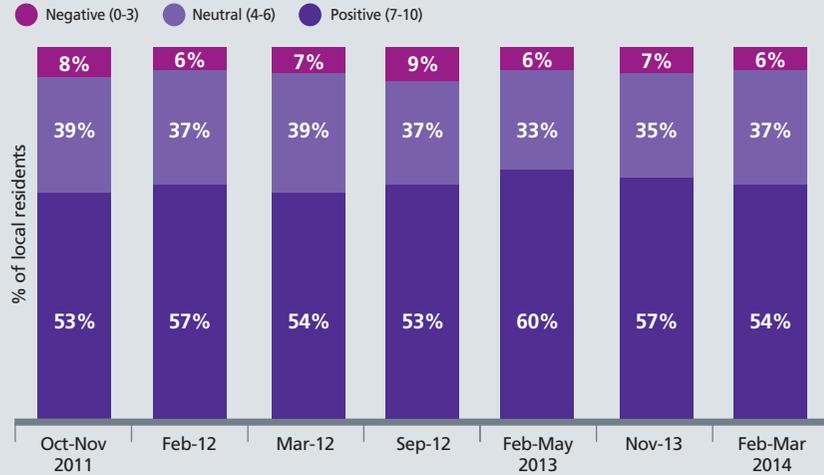
Heathrow has successfully delivered £11bn on infrastructure safely, on time, on budget and to high quality without affecting the operation of one of the world's busiest airports. We have a

proven ability to manage complex construction programmes such as Terminal 5 and the new Terminal 2. Terminal 2 has been the safest construction project in the UK.

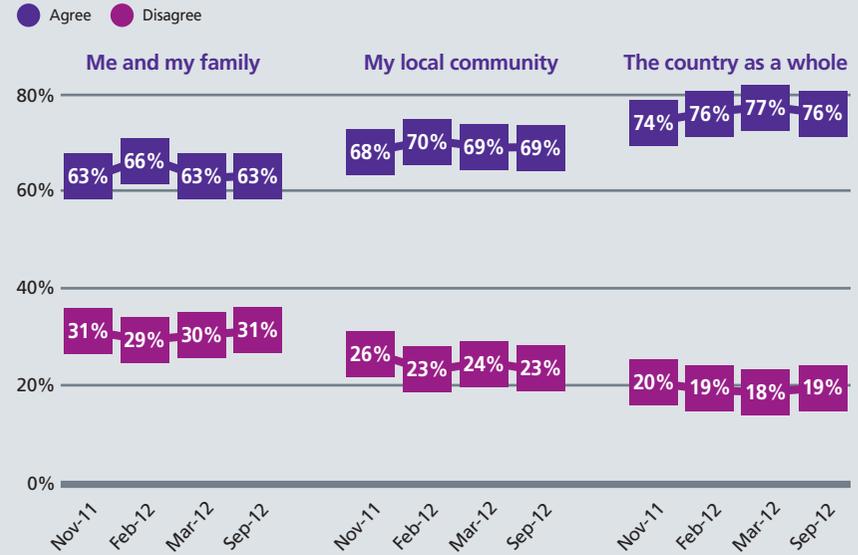
A third runway has local support

In 2010, all three major party leaders rejected plans for a third runway. Since then we have listened to stakeholders - to local residents, to business, to local politicians, to MPs around the country - about what was wrong with our previous plans and what they would want to see in any revised plans. We have been clear that what we submitted to the Airports Commission needs to be significantly different from what was previously rejected. That is why we have taken a new approach – including on runway location, aircraft noise, public transport connections, and jobs. Today, 57% of local people say they have a positive view of the airport compared to just 6% who have a negative view. 48% of local people support Heathrow expansion compared to 34% who are opposed. And in the last six months 20,000 people have joined Back Heathrow to campaign in support of the jobs and opportunities that expansion would bring.

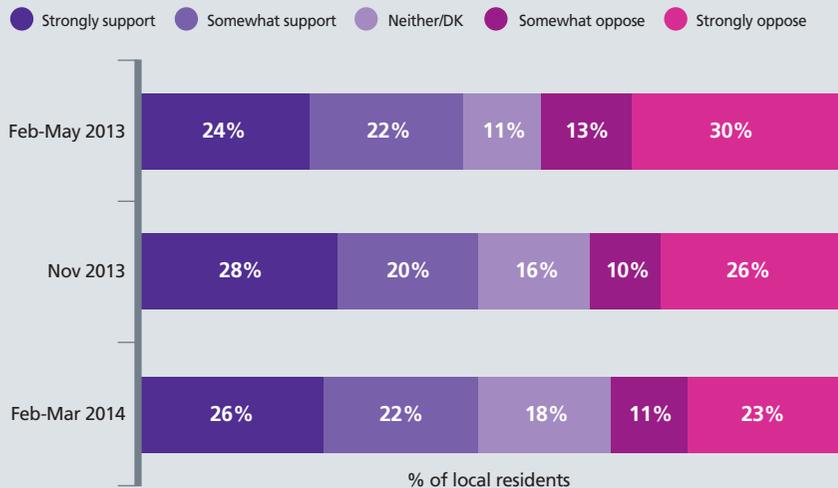
Taking everything into account, based on what you have seen, read and heard, how positive or negative would you say you feel towards Heathrow Airport? On a scale of 0-10, where 0 means very negative, 10 means very positive, and 5 is neutral



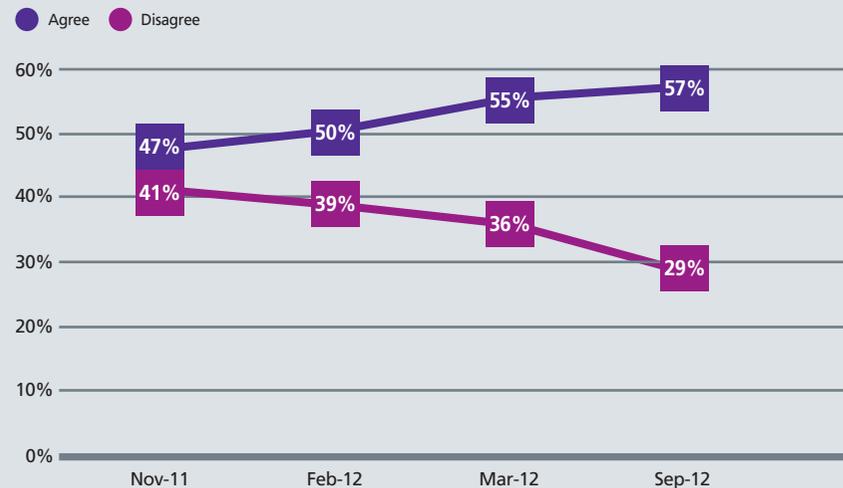
% of residents who agree / disagree that "the benefits of Heathrow generally outweigh the disadvantages for..."



Taking everything you know into account, do you currently support or oppose expanding Heathrow?



% of residents who agree that Heathrow is working to keep the impact of noise from flights to a minimum



11

Conclusion

There is a compelling case for a third runway at Heathrow.

As an island trading nation, good international transport links have been a source of competitive advantage for the UK. Now that advantage is being eroded. Our global hub airport is full, and is unable to add flights to fast growing destinations.

Britain's other airports have an important role to play but cannot compete with foreign hubs which make long-haul flights viable by mixing transfer passengers, direct passengers and freight.

So Britain faces a choice.

We can have the confidence and vision to develop our own hub into a world-class gateway for the 21st century, or we can accept that in future much of the world will not be able to fly to Britain direct.

Heathrow's proposal is deliverable – environmentally, practically, financially, and politically. It offers a different and improved approach from the previous proposals for a third runway, with less noise and less environmental impact.

The potential prize to be gained by taking a positive decision is huge: thousands of new jobs, more trade, more investment, and more growth. With new rail and air links the whole country will benefit.

Britain already has one of the world's most successful hub airports in Heathrow. Building on this strength will connect the UK to growth and help the UK win the global race.

Heathrow will take British people and businesses farther with the long-haul routes it provides than any other UK airport can.

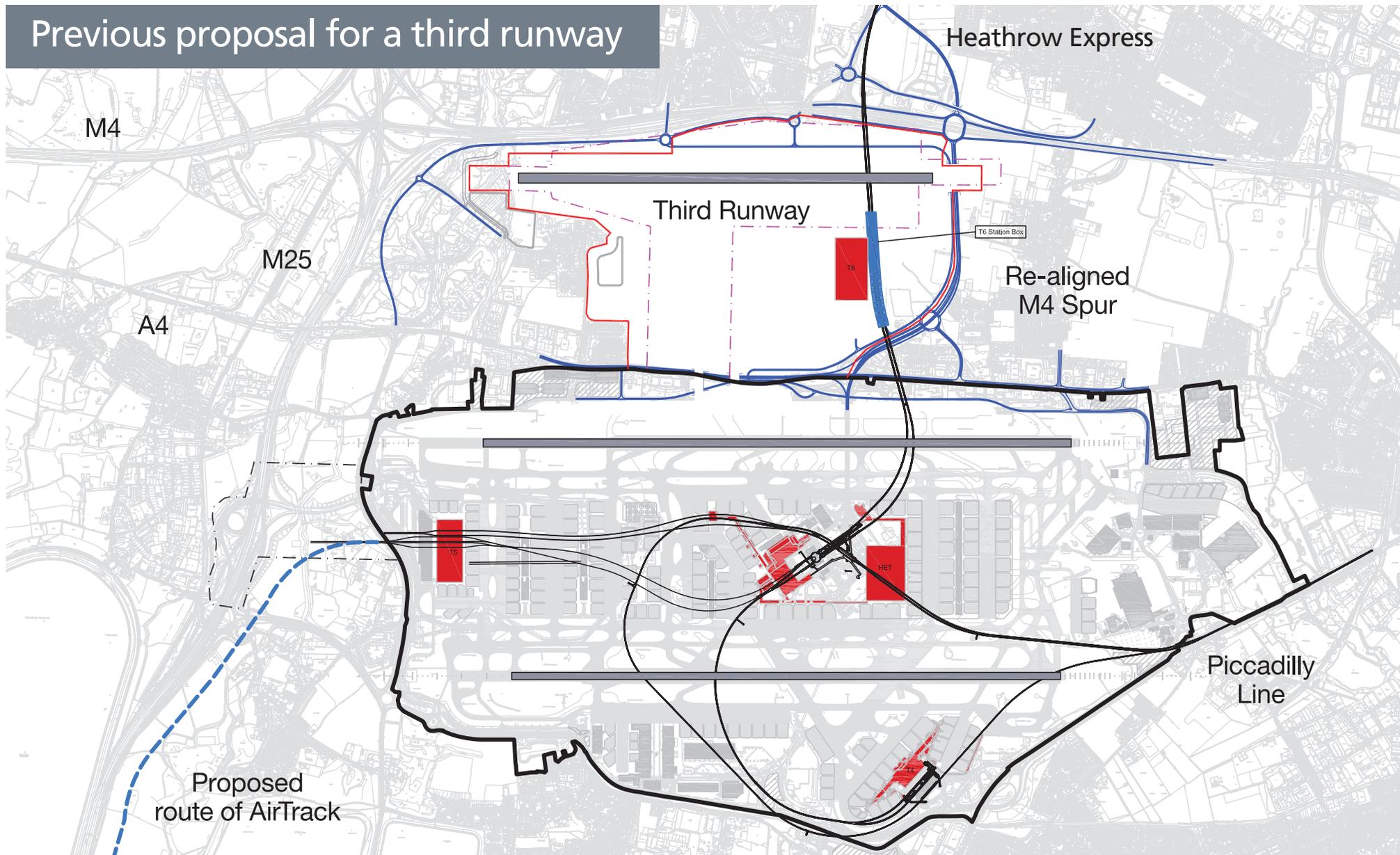
Heathrow will also take Britain further by supporting the trade, inbound tourism and investment that will deliver the jobs and economic growth we need.

It's time to make a positive decision for future generations and for all of Britain.

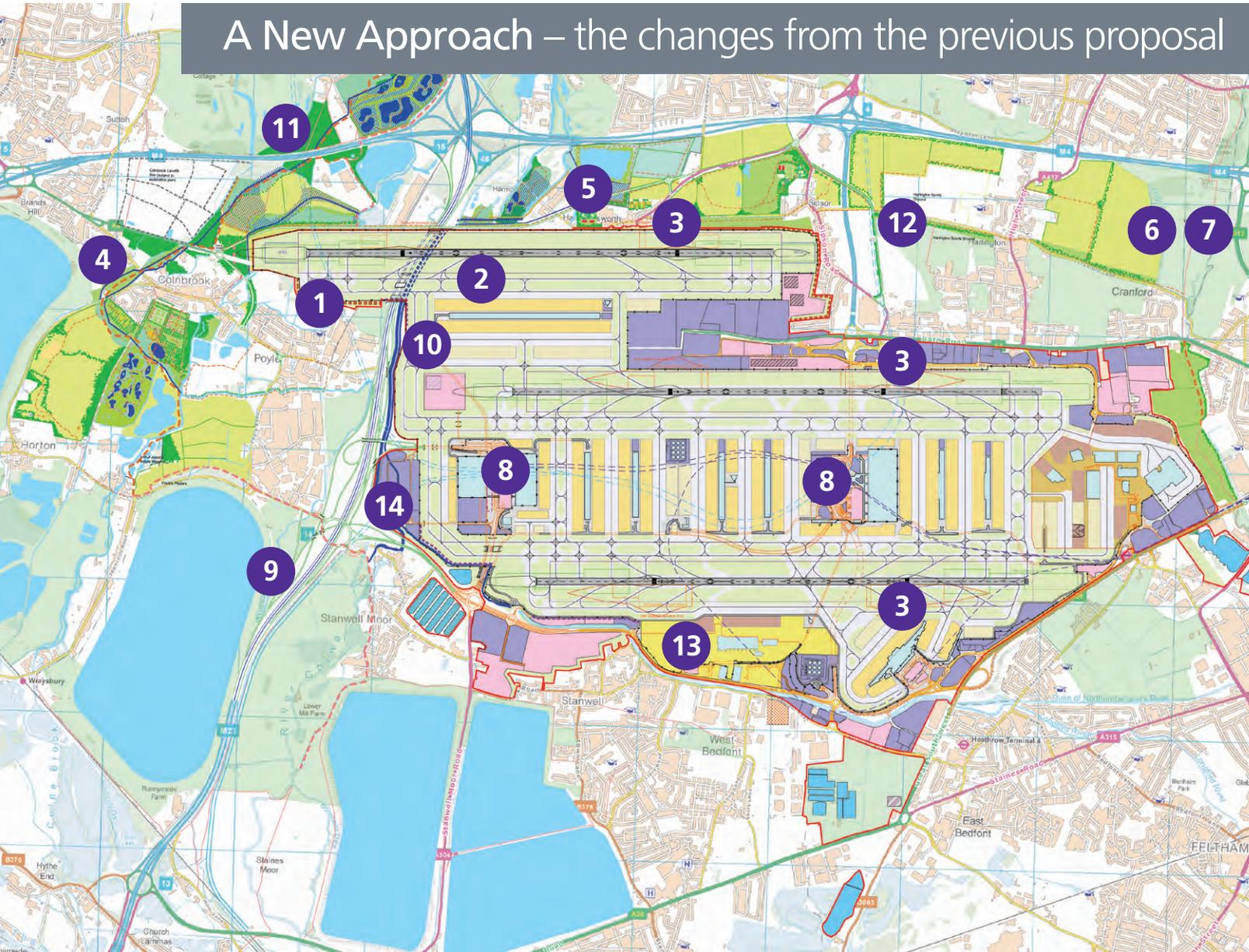
Only Heathrow can connect the whole of the UK to growth.



Previous proposal for a third runway



A New Approach – the changes from the previous proposal



Better for communities

- 1 Runway located further west to reduce noise
- 2 Runway length allows for periods of relief from noise
- 3 Aircraft touch down further along runways to reduce noise
- 4 New green spaces and flood protection for communities
- 5 More generous compensation for home owners
- 6 Better noise insulation schemes – £250m allocated
- 7 Steeper landing flight paths to reduce noise

Better for passengers

- 8 Two main passenger terminal and public transport areas
- 9 M25 redeveloped to improve traffic flow
- 10 Underground passenger transit makes for easy transfers
- 11 Western Rail link
- 12 Fast connection to HS2

Better for business

- 13 Doubling the capacity of freight facilities
- 2 Full length runway allows every aircraft type to take off
- 2 Total capacity for more flights than previous proposal
- 14 New space for commercial development

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