HEATHROW TODAY: BRITAIN’S FRONT DOOR

- 76 million passengers per annum
- 81 airlines serving 194 destinations in 82 countries
- 76,000 jobs supported at the airport
- 34% of UK exports by value (excluding the EU and Switzerland)
- 2 full length runways and 4 operational terminals
- 8 domestic routes

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HEATHROW TOMORROW: DELIVERING FOR PASSENGERS

Changing needs and expectations of passengers
Great yesterday is base case today
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>Independent Airports Commission established by Government</td>
</tr>
<tr>
<td>2014</td>
<td>Airports Commission publishes interim report with three options</td>
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<tr>
<td>2015</td>
<td>Airports Commission unanimously recommends an additional runway at Heathrow</td>
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<tr>
<td>2016</td>
<td>Government endorses the Airports Commission and announces policy support for Heathrow expansion</td>
</tr>
<tr>
<td>2017</td>
<td>Government publish draft National Policy Statement (NPS) and conduct a large scale public consultation</td>
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HEATHROW EXPANSION: THE BENEFITS

10,000 apprenticeships

Up to 180,000 jobs created across the UK

2x current cargo capacity for British exporters

Up to £211 billion in economic benefits across the UK

260,000 additional ATMs serving up to 40 new long haul routes

Up to 40,000 new local jobs
HEATHROW EXPANSION: MASTERPLAN

n.b. Masterplan is subject to change during planning process and community consultation

Multi-billion private sector investment

North West alignment minimises impact on local communities
HEATHROW EXPANSION: DELIVERING FOR ALL OF BRITAIN

(1) Scotland
up to £14.1 billion
and 16,100 jobs

(2) Northern Ireland
up to £3.9 billion
and 5,000 jobs

(3) North East
up to £4.0 billion
and 5,100 jobs

(4) North West
up to £12.5 billion
and 15,300 jobs

(5) Yorkshire and Humber
up to £9.0 billion
and 11,200 jobs

(6) East Midlands
up to £7.8 billion
and 9,800 jobs

(7) West Midlands
up to £9.7 billion
and 12,000 jobs

(8) Wales
up to £6.2 billion
and 8,400 jobs

(9) East of England
up to £11.5 billion
and 12,900 jobs

(10) London
up to £35.1 billion
and 38,400 jobs

(11) South East
up to £23.6 billion
and 33,200 jobs

(12) South West
up to £10.2 billion
and 12,300 jobs
HEATHROW EXPANSION: CONNECTING ALL OF BRITAIN

**New domestic routes**

**EasyJet and Flybe** have both indicated their desire to operate new services from an expanded Heathrow providing choice and competition for passengers.

Heathrow has become the first hub airport to support the principle of ring-fencing slots for domestic connections.

*Potential new routes based on potential route maps published by easyJet and Flybe.*
HEATHROW: THE UK’S GATEWAY

In 2016, non-EU and Switzerland trade via Heathrow was more than Felixstowe and Southampton combined.

Expansion will double cargo capacity.

34% of UK exports to destinations beyond the EU and Switzerland leave via Heathrow.

UK air freight by airport:

LHR

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LOGISTICS HUBS

Bids to build an expanded Heathrow

120 communities across the UK applied to host a logistics hub

A longlist of potential sites will be announced in Autumn

Map legend:
- East Midlands
- East of England
- London
- North East
- North West
- Northern Ireland
- Scotland
- South East
- South West
- Wales
- West Midlands
- Yorkshire and the Humber
LOGISTICS HUBS

HEATHROW IS LOCATING **FOUR LOGISTICS HUBS** ACROSS THE UK, SPREADING THE ECONOMIC BENEFITS OF EXPANSION TO COMMUNITIES ACROSS BRITAIN

**SKILLS:** Each logistics hub will create demand for both a skilled and semi-skilled workforce.

**SUPPLY CHAIN:** Opportunity for SMEs in every corner of the UK to access Heathrow's supply chain.

**COLLABORATION:** The hubs will allow for potential collaboration with other infrastructure projects.

**SUPPORT:** Local political or business support will ensure the benefits created are secured for the long-term.

**CONNECTIVITY:** Good connections will allow consolidated loads to be transported to Heathrow just as they are needed.

[Logistics Hubs Image]

www.heathrowexpansion.com

@yourHeathrow

Heathrow
Building for the future
HEATHROW EXPANSION: DELIVERING FOR PASSENGERS

"[We] expect the industry to work together to drive down costs for the benefit of passengers... [the] aim should be to deliver a plan for expansion that keeps landing charges close to current levels...”

UK Government, October 2016

Grimshaw appointed as concept architects to design a world-class, sustainable and affordable airport for the passengers of the future
“Too often in the UK we make large-scale investments in projects that deliver short-term results which do not benefit and include the wider population, or the long term needs of the country. There is no more room for lost opportunities. Our national infrastructure projects must go hand-in-hand with learning and training opportunities for the workforce of the future.”

Lord Blunkett
Chairman
Heathrow Skills Taskforce

Planning the delivery of 10,000 quality apprenticeships

Expansion will deliver up to 40,000 new local jobs
HEATHROW 2.0: A GREAT PLACE TO WORK

76,000 people work at Heathrow

1 in 5 local jobs are supported by the airport

Publishing a roadmap in 2017 to help transition employees in our supply chain to the London Living Wage

Ambition to reflect local diversity at every level of the company by 2025
HEATHROW 2.0: A GREAT PLACE TO LIVE

Heathrow’s third runway environmental commitments to its neighbouring communities:

☑ No scheduled night flights from 11pm - 5:30am
☑ Legally binding noise envelope
☑ Predictable periods of respite for every local community
☑ Extending compensation to over 3,000 additional properties
☑ £1bn compensation package for local people
☑ New independent Community Engagement Board
☑ Backing a new Independent Noise Authority
☑ Training and 10,000 apprenticeships
☑ Growth in accordance with air quality rules
☑ Accept Government ban on fourth runway

Meeting and exceeding the Airports Commission conditions

Airside ultra-low emissions zone by 2025

50% of passenger journeys by public transport by 2030
HEATHROW 2.0: NOISE

The Airports Commission confirmed that an expanded Heathrow would be quieter than it is today.

Collaboration with airlines and NATS is crucial to delivering a quieter Heathrow.

Heathrow is quieter now than it was in the early 1970s.
HEATHROW 2.0: AIR QUALITY

16% reduction in ground based NOx emissions over 5 years

9 out of 11 air quality monitors near Heathrow are within legal limits

The two that breach are next to the M4
HEATHROW 2.0: AIR QUALITY AFTER EXPANSION

Triple-lock guarantee on air quality

- Meeting our existing commitment to improve air quality as we expand
- Ensuring further options are ready to be introduced if required to reduce traffic
- Commitment not to release capacity unless within EU air quality limits

35 million public transport passenger journeys by 2030
HEATHROW 2.0: GREEN SPACES

£105 million available for new community buildings and green space

Enhanced public green space

four times the size of Hyde Park
HEATHROW 2.0: SUPPLY CHAIN

Sustainability Schools
16 Strategic partners signing up

Heathrow 2.0
shared
And measured with our supply chain
HEATHROW EXPANSION: BACKED BY BRITAIN

Business
- groups including BCC, CBI, FSB, IoD, support Heathrow expansion

70% of MPs support Heathrow expansion

Over 40 Chambers of Commerce support Heathrow expansion

Over 100,000 local people have shown their support for expansion by joining Back Heathrow

Trade unions
- including TUC, BALPA, Community, GMB, Prospect, Unite

38 UK airports support Heathrow expansion
HEATHROW EXPANSION