



HEATHROW COMMUNITY  
ENGAGEMENT BOARD

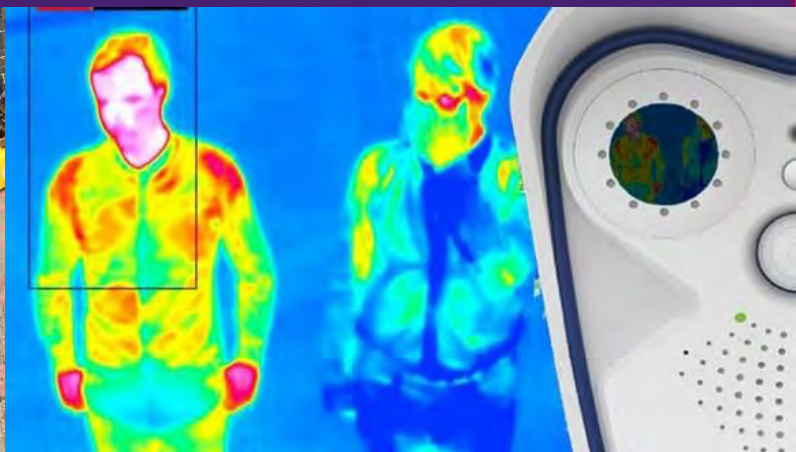
## INDEPENDENT FORUM

Members are requested to attend a virtual meeting to be held  
at **1.00pm on WEDNESDAY 9 SEPTEMBER 2020**

**Joining instructions to be circulated separately**

### AGENDA

1. 1.00 – 1.05pm	<b>Welcome and Chair's introduction</b>	Rachel Cerfontyne
2. 1.05 – 1.25pm	<b>Update on the CEO of Heathrow Airport, to include airport operations during COVID-19 pandemic and update on supreme court appeal process</b> <i>Circulated: Q2 report on day to day operations and operational impacts</i>	John Holland-Kaye
3. 1.25 – 1.55pm	<b>Q&amp;A session with CEO of Heathrow Airport</b>	John Holland-Kaye
4. 1.55 – 2.25pm	<b>Presentation from Oxford Economics on HCEB commissioned research on the impact on local economies of reduced activity at Heathrow airport</b> <i>Circulated: summary paper</i>	Neil McCullough, Associate Director and Patrick Deshpande, Senior Economist, Oxford Economics
5. 2.25 – 2.40pm	<b>Update on the work of the Heathrow Recovery Forum</b>	Becky Coffin, Director of Communities and Vic Chetty, Senior Stakeholder Engagement Manager, HAL
6. 2.40 – 2.55pm	<b>Questions and discussion on items 4 and 5</b>	
7. 2.55 – 3.00pm	<b>Chair's closing remarks</b>	Rachel Cerfontyne
<b>Remaining meeting date in 2020: 9 December</b>		



*2020: Q2*

*QUARTERLY REPORT TO THE HEATHROW COMMUNITY  
ENGAGEMENT BOARD*





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## INTRODUCTION:

This report covers the quarter 2 period from April to end of June 2020. The catastrophic impacts of COVID-19 across the world have been swift and significant.

COVID-19 continues to weigh on travel demand, with a drop in passenger numbers of over 95% compared to the start of last year's summer season. The Government's quarantine policy for international arrivals has significantly impacted passenger confidence and, combined with the possibility of a second wave in Europe, the airport has not seen the recovery during the summer season that we had hoped for. The introduction of airport testing is now more critical than ever, as flights remain grounded and more jobs continue to be put at risk in an industry crucial to rebuilding the UK economy. With cargo volumes also continuing to be impacted by the decline of long-haul passenger traffic, the ability for UK businesses to trade internationally has been limited.

At Heathrow, safety continues to be our priority and in addition to enhanced cleaning throughout the airport we have introduced a range of measures such as UV robots, UV handrail technology, 'Fly Safe' pit stops and hygiene technicians to reduce the risk of contracting or transmitting COVID-19 at the airport. We have also had the opportunity to undertake necessary repair works to the southern runway during this time. And the cost savings we are making now will help us to secure as many jobs as possible, whilst maintaining the agility to return to growth when passenger demand increases.

Despite the steps we have taken over the last decade to strengthen the financial resilience of the business, Heathrow is not immune to this crisis. We must act responsibly to protect the long-term success of Heathrow and deliver on our commitments to all stakeholders that rely on our national critical role. At the start of this crisis Heathrow moved fast to cut costs by reducing management roles, restructuring the organisation, suspending executive pay and cancelling or pausing capital projects. We have had to take difficult decisions in order for the business to survive and remain competitive.

The financial position we built up over the past decade means that the actions we are taking now are compatible with maintaining our strategic long-term ambition of sustainable growth. Keeping people safe remains our first and non-negotiable priority. Despite the challenges the airport faces, we are standing by our commitment as a Living Wage employer and our Prompt Payment Code pledge to pay suppliers within 30 days. We are also working hard to retain as much of our incredibly talented team as possible, which we will need in the recovery.



## Q2 COVID-19 RESPONSE:

Covid-19 has without doubt been a challenging time for the airport, but we also know that our community has needed us more than ever before. That is why we have continued to be committed to being a responsible neighbour throughout the crisis. In this quarter, we have shared resources and given whatever we can to make a difference to our community. This has included providing support to foodbanks, hospitals, community groups and primary schools.



We are proud to have:

- Donated 71 new laptops to 14 local primary schools and 30 laptops to four local councils to support their COVID recovery efforts. The laptops to primary schools allowed children to learn at home who didn't otherwise have access to technology.
- Donated 15,000 FFP3 facemasks to local hospitals, including Hillingdon, and to Thames Valley Air Ambulance.
- Redeployed our Heathrow Community Rangers to allow us to deliver 500 learning packs each fortnight to children from William Byrd Primary Academy, meaning they can learn at home. We also donated paper to Colnbrook Primary allowing them to print work for children to complete at home. And we finished the school term by delivering 600 reports directly to children's homes.



- Provided weekly support to Slough Council for Voluntary Service, delivering food and essentials to the community, care homes and hospitals. Supported St Kitts and Nevis Association Slough with weekly deliveries to get food to the most vulnerable in Slough.
- Mobilised Team Heathrow companies to provide support too, including the loaning of 37 barriers to two primary schools to help them create playground bubbles, making it safe for children at break time.
- Supported six different foodbanks, donating and delivering 1000s of Harrods confectionery items, Cafe Nero pastries, M&S flapjacks, 9,500 creme eggs, and 100s of cartons of apple and orange juice.
- Donated 60,000 liquids bags to West Hertfordshire Hospitals NHS Trust so that their staff have somewhere to safely store personal items.

Our Heathrow Community Ranger team are now beginning to resume their usual Ranger activities, which means that after many months of delivering school learning packs and donations to foodbanks, they'll now be back out-and-about in the communities of Stanwell, Stanwell Moor, Colnbrook and Poyle, litter picking and landscaping as part of Heathrow's Better Neighbour Programme.

### **Heathrow Community Trust**

- £95,000 in rapid emergency COVID-19 funding was released by the Heathrow Community Trust (HCT), an independent charity funded by Heathrow Airport and supported by its colleagues and partners. The funding helped keep vital community services running, including food banks and support services for the isolated and vulnerable.



## HEATHROW'S THREE PHASE PLAN:

The COVID-19 outbreak continues to represent a seismic challenge for the aviation industry, including Heathrow. We have put together a three-phase plan in response to the crisis.

### Protecting our business

- Ensuring that we continue to deliver on safety and security is our first and non-negotiable priority. We have added safety measures across the passenger journey following close collaboration with Public Health England. We have begun trialling a number of technologies and processes to keep the airport COVID-19 secure and rebuild passenger confidence as travel resumes, including temperature testing trials and the use of UV sanitation to quickly and efficiently disinfect key touchpoints in the passenger journey. We stand ready to host UK's first pilot 'Test-on-Arrival' procedure from Collinson and Swissport. The pilot, which is subject to Government approval, could allow COVID-19 negative passengers arriving from higher risk countries to enter the UK without the need to quarantine. Testing passengers before they board a plane would be even more effective but would require a Common International Standard which the UK Government could take a lead on setting up.
- COVID-19 has had a significant impact on our financial performance. Management has taken rapid actions to protect the financial resilience of the business enabling a reduction in our average monthly cash burn from £240 million to £159 million. These savings will be achieved through initiatives to reduce our operating costs and our capital expenditure by over £650 million. The reduction in capital expenditure is largely driven by the demobilisation and delay of the expansion programme. This year's much reduced capital plan focuses on projects which ensure the safety and resilience of the airport, such as Hold Baggage Screening, cargo tunnel works, resurfacing of the southern runway and asset renewal.
- In April, we moved to single runway operations and consolidated passenger operations into two terminals while maintaining enough flexibility to ramp up as passenger demand returns. We now have around 70% of our incumbent airlines flying and three new airlines. We have therefore reopened Terminal 5C to provide additional capacity to support their operations. Many of our retail outlets closed in late March, leaving only essential retailers open. Stores began to reopen in late June following Government guidance meaning that we now have around 40% of outlets open across Terminals 2 and 5.

### Winning the recovery



- Creating an environment where passengers feel safe and confident to fly is fundamental to winning the recovery. Following Government advice and best practice, we have established five key areas that define our Fly Safe model. These standards will create a different service proposition for both passengers and colleagues.
- These five areas are:
  - Personal protection: all colleagues and passengers will have to use face coverings in our terminals and operational areas.
  - Physical protection: we have installed Perspex screens at check-in desks and security areas to increase separation between passengers and colleagues.
  - Social distancing: multiple methods have been used across our terminals and rail stations to remind passengers to socially distance. These methods include floor stickers, monoliths, seat blocking, tensor barriers and one-way systems.
  - Health screening: we have launched thermal screening trails that use camera detection systems to quickly and seamlessly screen passengers with minimal impact to the passenger journey.
  - Hygiene: we have installed hundreds of hand sanitiser dispensers and implemented additional cleaning and sanitation procedures across the campus using pioneering technologies. These technologies include UV cleaning robots using UV rays to kill viruses and bacteria, UV handrail technology to disinfect the continuously moving handrails and anti-viral wraps fitted to high-touch surfaces, coating them with long-lasting antiviral protection.

### **Building back better**

- Delivering our long-term ambitions for growth will be done in the right way. Our focus remains on taking the lead in getting the aviation industry to net zero-carbon and aligning the airport and sector to the goals of the Paris Agreement on Climate Change. We welcome the Government's announcement of aligning aviation within the UK's target net zero carbon emissions by 2050.
- This crisis represents an opportunity for us to transform the way we operate, bringing more flexibility and dynamism into our operating model. As we move forward and build back better, we will embrace digitalisation through our retail proposition, security processes and contactless passenger experience. We will also look into the value proposition with our supply chain through closer supply partnerships.
- We do believe that once the benefits of air travel and connectivity have been restored, an expanded Heathrow will be required to deliver the Government's vision of a Global Britain. We will therefore progress our appeal to the Supreme Court following the Court of Appeal's ruling last February.





- In recognition of the asymmetric risk in the regulatory model that has been exposed by the COVID-19 crisis, but was not allowed for in the allowed regulatory returns, Heathrow has requested that the CAA makes a policy statement setting out that it will amend Heathrow's Regulated Asset Base to allow Heathrow to recover excess losses over an extended period of time. This would avoid the need for material changes to the risk premium, which would translate to higher consumer prices.



## Our vision

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To give passengers the best airport service in the world

## Our purpose

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Making every journey better

## Our priorities

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### Mojo

To be a great place to work, we will help our people fulfil their potential and work together to lead change across Heathrow with energy and pride.



### Transform customer service

To deliver the world's best passenger experience, we will work with the Heathrow community to transform the service we give to passengers and airlines, improving punctuality and resilience.



### Beat the plan

To secure future investment, we will beat the Q6 business plan and deliver a competitive return to shareholders by growing revenue, reducing costs and delivering investments efficiently.



### Sustainable growth

To grow and operate our airport sustainably, now and in the future.

## Our values



Keeping everyone safe



Treating everyone with respect



Giving excellent service



Working together



Doing the right thing



Improving every day



## TRANSFORM CUSTOMER SERVICE: HEATHROW'S ASQ PERFORMANCE

### PUNCTUALITY

- All our passenger & colleague research programmes were suspended on 23<sup>rd</sup> March with only certain programmes recommencing in late July. Given this suspension there is no data available to provide an update for Q2.

Service standard performance indicators (1)	2019	2020
ASQ	4.18	...(2)
Experience as "excellent" or "very good" %	82.2	...(2)
Baggage connection %	99.1	99.1
Departure punctuality %	82.6	86.0
Security queuing %	96.5	97.3
Connections satisfaction	4.14	...(2)

(1) For the 6 months ended June

(2) Passenger satisfaction and research has been temporarily suspended



## BEAT THE PLAN: HEATHROW'S QUARTERLY RESULTS

### Results for Q2 April – June 2020

- Safety remains our biggest priority – We are deploying UK's most extensive array of new COVID-secure technologies to protect passengers and colleagues.
- Significant passenger decline pushes Heathrow to loss - Passenger numbers were down over 96% in Q2 as global aviation came to a virtual standstill. We anticipate a gradual recovery as countries reopen borders, but that 2020 passenger volumes will be more than 60% lower than 2019. Q2 revenue fell 85% to £119 million and adjusted EBITDA turned to a loss of £93 million. We recorded an adjusted loss before tax of £471 million in the first six months of 2020.
- Cargo volumes were down over 30%, hit by loss of passenger flights – Cargo at the UK's biggest port usually travels in the hold of passenger planes. The increase in cargo-only flights has not offset the loss of passenger flights to long haul markets.
- Decisive action has been taken to protect jobs and cut costs – We acted quickly to reduce our average cash burn by over 30%, by cutting at least £300 million operating costs and cancelling or pausing over £650m of capital projects. We have tried to protect as many jobs as possible and maintain pay at or above the London Living Wage.
- Heathrow finances remain robust - Cash reserves are sufficient until at least June 2021 with no revenue. We have agreed a waiver on financial covenants until the end of 2021 and maintained our Investment Grade credit rating status.
- UK's economic recovery depends on restarting aviation - Government's risk-based approach to allow quarantine-free flights from low and medium risk countries is very welcome, but only covers 30% of Heathrow's markets. Establishing an alternative to quarantine for COVID-free passengers from other countries should be a priority for Government. Pre-flight testing for passengers from high risk countries will allow long haul flying to resume, which is critical for the UK's economic recovery.



At or for 3 months ended 30 June	2019	2020	Change (%)
(£m unless otherwise stated)			
Revenue	1,461	712	(51.3)
Cash generated from operations	907	294	(67.6)
Profit / (loss) before tax	7	(1,059)	--
Adjusted EBITDA <sup>(1)</sup>	907	222	(75.5)
Adjusted profit / (loss) before tax <sup>(2)</sup>	153	(471)	--
Heathrow (SP) Limited consolidated nominal net debt <sup>(3)</sup>	12,412	12,860	3.6
Heathrow Finance plc consolidated net debt <sup>(3)</sup>	14,361	14,932	4.0
Regulatory Asset Base <sup>(4)</sup>	16,598	16,516	(0.5)
Passengers (million) <sup>(5)</sup>	38.8	15.4	(60.2)

### Notes

(1) Adjusted EBITDA is profit before interest, taxation, depreciation, amortisation, fair value adjustments on investment properties and exceptional items.

(2) Adjusted profit before tax excludes fair value adjustments on investment properties and financial instruments and exceptional items.

(3) Consolidated nominal net debt is short and long-term debt less cash and cash equivalents and term deposits. It includes index-linked swap accretion and the hedging impact of cross currency interest rate swaps. It excludes pre-existing lease liabilities recognised upon transition to IFRS 16, accrued interest, bond issue costs and intra-group loans.

(4) The Regulated Asset Base is a regulatory construct, based on predetermined principles not based on IFRS. It effectively represents the invested capital on which we are authorised to earn a cash return.

(5) Changes in passengers and retail revenue per passenger are calculated using unrounded passenger numbers.



## SUSTAINABLE GROWTH: NIGHT FLIGHTS: DEPARTURES

Late running departures by quota, dispensed and exempt (Jan – Jun 2020)



Departure Night Movements 2020	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Quota	12	11	9	5	2	3							42
Dispensed	1	8	-	-	-	-							9
Exempt	-	-	-	-	-	-							-
<b>Total</b>	<b>13</b>	<b>19</b>	<b>9</b>	<b>5</b>	<b>2</b>	<b>3</b>							<b>51</b>

### Notes

1. Dispensed flights: Sometimes, for reasons of disruption, emergency or passenger hardship, flights are allowed by DfT to operate outside the constraints of the movement limits.
2. Exempt flights: Exempt aircraft are light propeller-driven aircraft with a maximum certificated take-off weight not exceeding 8,618kg, and which are being utilised to undertake essential airport safety checks. Other exempt flights include State flights, head of Military, select VIP's.



## Departure night movements by time window (Jan – Jun 2020)

Departure Night Movements 2020	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
23:30 - 00:00	8	11	5	4	2	2							32
00:00 - 00:30	4	8	4	1	-	1							18
00:30 - 01:00	-	-	-	-	-	-							-
01:00 - 01:30	-	-	-	-	-	-							-
01:30 - 02:00	1	-	-	-	-	-							1
02:00 - 02:30	-	-	-	-	-	-							-
02:30 - 03:00	-	-	-	-	-	-							-
03:00 - 03:30	-	-	-	-	-	-							-
03:30 - 04:00	-	-	-	-	-	-							-
04:00 - 04:30	-	-	-	-	-	-							-
04:30 - 05:00	-	-	-	-	-	-							-
05:00 - 05:30	-	-	-	-	-	-							-
05:30 - 06:00	-	-	-	-	-	-							-
<b>Total</b>	<b>13</b>	<b>19</b>	<b>9</b>	<b>5</b>	<b>2</b>	<b>3</b>							<b>51</b>



## NIGHT FLIGHTS: ARRIVALS

Late running arrivals by quota, dispensed and exempt (Jan – Jun 2020)



Arrival Night Movements 2020	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Quota	2	5	6	-	1	-							14
Dispensed	1	17	4	-	-	-							22
Exempt	-	-	-	-	-	-							-
<b>Total</b>	<b>3</b>	<b>22</b>	<b>10</b>	<b>-</b>	<b>1</b>	<b>-</b>							<b>36</b>

### Notes

1. Dispensed flights: Sometimes, for reasons of disruption, emergency or passenger hardship, flights are allowed by DfT to operate outside the constraints of the movement limits.
2. Exempt flights: Exempt aircraft are light propeller-driven aircraft with a maximum certificated take-off weight not exceeding 8,618kg, and which are being utilised to undertake essential airport safety checks. Other exempt flights include State flights, head of Military, select VIP's.





## Arrival night movements by time window (Jan – Jun 2020)

Arrival Night Movements 2020	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
23:30 - 00:00	1	15	6	-	1	-							23
00:00 - 00:30	1	3	2	-	-	-							6
00:30 - 01:00	-	3	-	-	-	-							3
01:00 - 01:30	-	1	-	-	-	-							1
01:30 - 02:00	-	-	2	-	-	-							2
02:00 - 02:30	-	-	-	-	-	-							-
02:30 - 03:00	-	-	-	-	-	-							-
03:00 - 03:30	-	-	-	-	-	-							-
03:30 - 04:00	-	-	-	-	-	-							-
04:00 - 04:30	1	-	-	-	-	-							1
04:30 - 05:00	213	170	192	9	63	77							724
05:00 - 05:30	163	182	145	45	46	25							606
05:30 - 06:00	112	175	68	39	35	41							470
<b>Total</b>	<b>491</b>	<b>549</b>	<b>415</b>	<b>93</b>	<b>145</b>	<b>143</b>							<b>1,836</b>

## Notes

1. Arrivals from 04:30 to 06:00 are scheduled early morning arrivals.



## COMPLAINTS STATISTICS

### Overall statistics

332 people complained between April and June 2020, making over 7,000 complaints.

	Apr 2020	May 2020	Jun 2020	Total
<b>No. of Complainants</b>	121	161	173	332
<b>No. of Complaints</b>	2,283	2,707	2,223	7,213

### Top 10 Complainants

Complaints from the 10 people who complained the most times this quarter.

No. of Complaints	Percentage of Total Complaints	Percentage of Complainants
5,657	78.4%	3.0%

### Complainants who complained less than 5 times

Complaints from people who contacted Heathrow 5 times or less this quarter.

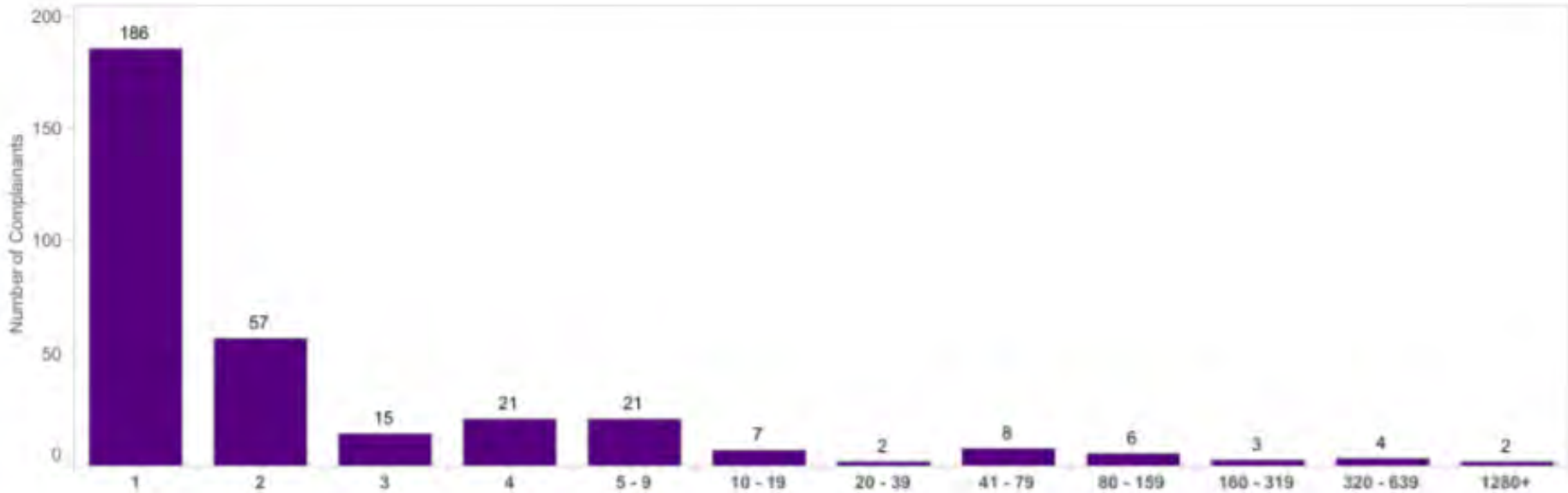
No. of Complaints	No. of Complainants	Percentage of Total Complainants	Percentage of Total Complaints
466	286	86.1%	6.5%



## DISTRIBUTION OF COMPLAINTS

### How many times complainants contacted us

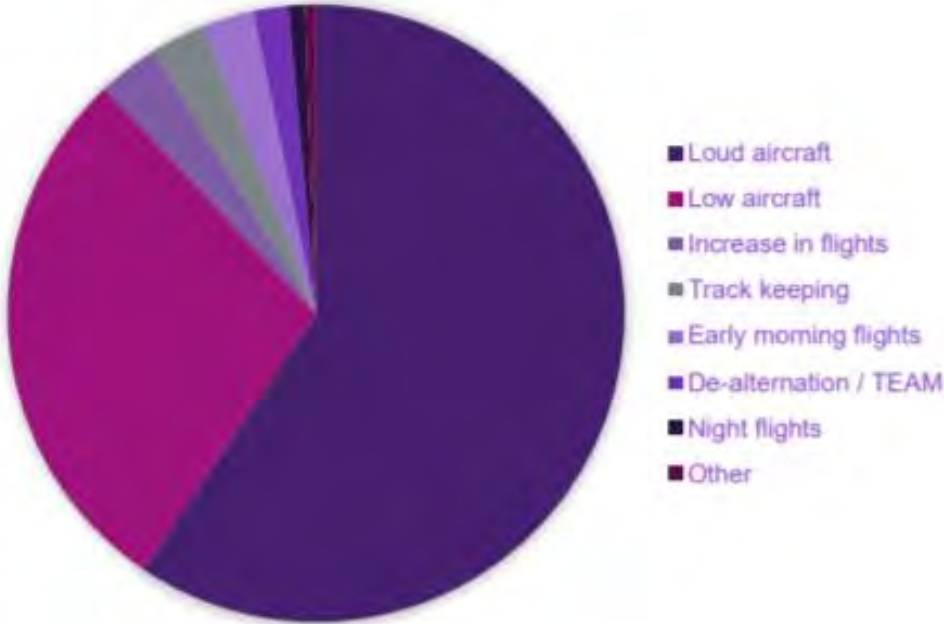
The histogram below plots how many people against how many times they contacted Heathrow this quarter. For example, it shows that 186 people complained once, that 15 people complained 3 times and that 2 people complained more than 1,280 times.





### NOISE COMPLAINTS BY CATEGORY

Complaint Category	Proportion
Loud aircraft	59.5%
Low aircraft	28.5%
Increase in flights	3.2%
Track keeping	2.9%
Early morning flights	2.7%
De-alternation / TEAM	1.8%
Night flights	0.9%
Other	0.6%



Note: Multiple or duplicate complaints made by one person on one day are not included in this chart.



## SUSTAINABLE GROWTH: AIR QUALITY AND CLIMATE CHANGE

Due to the Covid-19 crisis and colleagues being furloughed the air quality data is not yet available for Q1 or Q2. This information will be provided in a future report when it is available.

Climate change remains a key focus within our sustainable growth priority:

- Climate change remains the single greatest challenge facing society and our industry over the medium to long term. This debate has remained a live one during the COVID-19 crisis. A clean and resilient recovery will be required so that we, as an industry, can build back better. We welcome the Government's recognition that there is a need to accelerate action to decarbonise aviation as part of a green recovery. We look forward to contributing to the Government's 'Jet Zero Council', bringing together aviation, Government and environmental leaders to drive action on sustainable fuel and future zero emission technology.
- Over the next decade, sustainable aviation fuel ('SAF') represents the best way to accelerate a reduction in carbon. SAF can be utilised by existing aircrafts without waiting for a 25-year replacement cycle. The challenge is an economic one – the small volumes of SAF currently produced are expensive. A Government package of supply side regulations, demand incentives and financial support is needed, pursued with urgency and purpose.
- The two key steps we are advocating for are a fuel blending mandate to drive supply, and a restructuring of Air Passenger Duty ('APD') to cut the price of SAF for airlines who use it. These asks build on those of UK air industry coalition, Sustainable Aviation, which is calling for financial support from Government, matched by private investment, to open the first two to three UK plants by 2025.



# EMPLOYMENT AND SKILLS ACADEMY

## APRIL

**Candidate interactions**  
This reflects the total number of interactions between the Academy Team and local residents

	Ealing	Elmbridge	Hillingdon	Hounslow	Runnymede	Slough	South Bucks	Spelthorne	Windsor and Maidenhead	Other	Total
<b>Total for month</b>	12	0	8	23	0	26	0	4	11	4	88
<b>Total year to date</b>	82	0	88	137	0	36	0	13	11	31	398

**Website Registrations**  
This reflects the total number of people who have created a profile on our website

	Ealing				Elmbridge				Hillingdon				Hounslow				Runnymede				Slough				South Bucks				Spelthorne				Windsor and Maidenhead				Other				Total			
<b>Total for month</b>	5				0				10				10				0				7				1				1				0				33				67			
JCP/ EI/ AIE/ Other	1	2	2	0	0	0	0	0	3	1	6	0	1	2	7	0	0	0	0	0	2	1	4	0	0	1	0	0	0	0	1	0	0	0	0	0	6	12	15	0	13	19	35	0
<b>Total year to date</b>	313				13				352				506				22				127				18				64				21				770				2206			
<b>Total year to date</b>	32	142	129	10	3	4	6	0	37	140	166	9	45	224	228	9	1	8	12	1	14	41	69	3	1	3	14	0	4	17	41	2	0	9	12	0	90	302	365	13	227	890	1042	47

JCP – JobCentrePlus EI – Economically Inactive AIE – Already in Employment Other (e.g. walk-in, did not disclose)



MAY

Candidate interactions

This reflects the total number of interactions between the Academy Team and local residents

	Ealing	Elmbridge	Hillingdon	Hounslow	Runnymede	Slough	South Bucks	Spelthorne	Windsor and Maidenhead	Other	Total
Total for month	15	0	10	21	0	10	1	3	2	13	75
Total year to date	97	0	98	158	0	46	1	16	13	44	473

Website Registrations

This reflects the total number of people who have created a profile on our website

	Ealing	Elmbridge	Hillingdon	Hounslow	Runnymede	Slough	South Bucks	Spelthorne	Windsor and Maidenhead	Other	Total	
Total for month	10	1	18	22	3	36	3	2	5	56	156	
JCP/ EI/ AIE/ Other	1 4 5 0 0 1 0 0 4 5 9 0 2 11 9 0 0 1 2 0 25 5 6 0 0 1 2 0 0 2 0 0 5 0 0 0 4 14 36 2 41 44 69 2											
Total year to date	323	14	370	528	25	163	21	66	26	826	2362	
Total year to date	33 146 134 10 3 5 6 0 41 145 175 9 47 235 237 9 1 9 14 1 39 46 75 3 1 4 16 0 4 19 41 2 5 9 12 0 94 316 401 15 268 934 1111 49											

JCP – JobCentrePlus EI – Economically Inactive AIE – Already in Employment Other (e.g. walk-in, did not disclose)



**JUNE**

**Candidate interactions**  
This reflects the total number of interactions between the Academy Team and local residents

	Ealing	Elmbridge	Hillingdon	Hounslow	Runnymede	Slough	South Bucks	Spelthorne	Windsor and Maidenhead	Other	Total
<b>Total for month</b>	28	0	23	40	0	22	0	6	4	11	134
<b>Total year to date</b>	151	0	141	234	0	86	1	26	17	82	738

**Website Registrations**  
This reflects the total number of people who have created a profile on our website

	Ealing	Elmbridge	Hillingdon	Hounslow	Runnymede	Slough	South Bucks	Spelthorne	Windsor and Maidenhead	Other	Total
<b>Total for month</b>	20	4	31	35	1	8	0	4	4	55	162
JCP/ EI/ AIE/ Other	1 8 11 0	1 2 1 0	7 9 14 1	6 10 18 1	0 0 1 0	2 2 3 1	0 0 0 0	1 0 3 0	0 2 2 0	10 17 26 2	28 50 79 5
<b>Total year to date</b>	367	19	418	591	26	175	22	73	33	905	2629
<b>Total year to date</b>	35 164 156 12	4 8 7 0	52 160 196 10	57 258 266 10	1 9 15 1	43 48 80 4	1 4 17 0	5 20 46 2	7 12 14 0	107 341 438 19	312 1024 1235 58

JCP – JobCentrePlus EI – Economically Inactive AIE – Already in Employment Other (e.g. walk-in, did not disclose)





## SUSTAINABLE GROWTH: TRAFFIC SUMMARY

- COVID-19 continues to weigh on travel demand, with a drop in passenger numbers of over 95% compared to the start of last year's summer season
- Government's quarantine policy for international arrivals impacted load factors, which declined by 7% following its introduction in early June, compared to 2019. An exit plan is now more critical than ever, as long-haul flights remain grounded and more jobs continue to be put at risk in an industry crucial to rebuilding the UK economy
- Whilst steps toward travel corridors in July provide some hope for an initial recovery, further pace is needed to move past quarantine. Heathrow urges Government to act faster on establishing Common International Standards that would allow safer travel to critical trading routes.

### Traffic Summary

## April 2020

### Terminal Passengers

(000s)	Apr 2020	% Change	Jan to Apr 2020	% Change	May 2019 to Apr 2020	% Change
<b>Market</b>						
UK	10	-97.7	923	-36.7	4,306	-9.4
EU	67	-97.1	4,649	-43.4	23,897	-13.8
Non-EU Europe	7	-98.5	1,087	-40.0	4,968	-13.1
Africa	7	-97.7	792	-33.5	3,115	-9.4
North America	27	-98.3	3,244	-39.9	16,683	-9.4
Latin America	4	-96.4	310	-31.9	1,237	-9.9
Middle East	37	-94.6	1,654	-32.4	6,959	-8.1
Asia / Pacific	48	-94.9	2,195	-41.7	9,839	-15.1



<b>Total</b>	<b>206</b>	<b>-97.0</b>	<b>14,854</b>	<b>-39.9</b>	<b>71,003</b>	<b>-11.9</b>
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### Air Transport Movements

	<b>Apr 2020</b>	<b>% Change</b>	<b>Jan to Apr 2020</b>	<b>% Change</b>	<b>May 2019 to Apr 2020</b>	<b>% Change</b>
<b>Market</b>						
UK	245	-93.3	9,061	-25.0	37,703	-1.2
EU	1,517	-91.5	43,152	-35.7	185,303	-12.8
Non-EU Europe	205	-94.2	9,754	-33.1	38,725	-11.6
Africa	124	-90.4	3,632	-30.6	13,625	-8.4
North America	1,263	-82.0	18,739	-28.5	75,952	-8.4
Latin America	36	-92.7	1,435	-28.9	5,422	-11.3
Middle East	574	-76.6	7,509	-24.3	28,167	-7.4
Asia / Pacific	904	-76.7	10,552	-33.1	41,841	-12.0
<b>Total</b>	<b>4,868</b>	<b>-87.9</b>	<b>103,834</b>	<b>-32.1</b>	<b>426,738</b>	<b>-10.4</b>

### Cargo (Metric Tonnes)

	<b>Apr 2020</b>	<b>% Change</b>	<b>Jan to Apr 2020</b>	<b>% Change</b>	<b>May 2019 to Apr 2020</b>	<b>% Change</b>
<b>Market</b>						
UK	1	-96.8	143	-25.7	537	-30.7
EU	3,368	-57.4	22,194	-28.3	85,621	-16.9
Non-EU Europe	1,525	-64.8	10,147	-45.7	48,452	-17.8
Africa	1,809	-78.6	21,967	-32.1	82,934	-11.5
North America	20,072	-57.3	148,931	-25.9	512,969	-15.8
Latin America	286	-94.1	11,502	-38.6	47,145	-14.3



Middle East	9,635	-53.5	67,373	-17.2	245,119	-4.0
Asia / Pacific	14,252	-63.9	101,303	-35.8	407,097	-19.6
<b>Total</b>	<b>50,949</b>	<b>-61.7</b>	<b>383,560</b>	<b>-29.1</b>	<b>1,429,874</b>	<b>-15.0</b>

## May 2020

Terminal Passengers (000s)	May 2020	% Change	Jan to May 2020	% Change	Jun 2019 to May 2020	% Change
<b>Market</b>						
UK	12	-97.3	935	-50.6	3,882	-24.2
EU	92	-96.2	4,740	-55.4	21,584	-27.5
Non-EU Europe	11	-97.5	1,098	-51.4	4,534	-26.6
Africa	8	-96.9	800	-44.9	2,861	-24.4
North America	31	-98.2	3,275	-53.9	15,008	-24.8
Latin America	4	-96.7	314	-44.9	1,127	-24.5
Middle East	30	-94.2	1,684	-43.2	6,471	-21.6
Asia / Pacific	39	-95.6	2,234	-51.9	9,067	-27.9
Blanks	1	0.0	1	0.0	1	0.0
<b>Total</b>	<b>228</b>	<b>-96.6</b>	<b>15,082</b>	<b>-52.1</b>	<b>64,535</b>	<b>-26.0</b>

Air Transport Movements	May 2020	% Change	Jan to May 2020	% Change	Jun 2019 to May 2020	% Change
<b>Market</b>						
UK	216	-94.2	9,277	-41.4	34,186	-17.3



EU	1,428	-92.4	44,580	-48.1	168,016	-26.7
Non-EU Europe	270	-92.7	10,024	-45.2	35,292	-25.7
Africa	255	-79.1	3,887	-39.8	12,661	-22.5
North America	1,552	-79.3	20,291	-39.8	70,020	-22.0
Latin America	75	-85.3	1,510	-40.2	4,987	-25.0
Middle East	930	-60.4	8,439	-31.2	26,751	-18.6
Asia / Pacific	1,629	-57.9	12,181	-38.0	39,875	-22.8
Blanks	121	-	121	-	121	-
<b>Total</b>	<b>6,476</b>	<b>-84.4</b>	<b>110,310</b>	<b>-43.4</b>	<b>391,909</b>	<b>-24.0</b>

<b>Cargo (Metric Tonnes)</b>	<b>May 2020</b>	<b>% Change</b>	<b>Jan to May 2020</b>	<b>% Change</b>	<b>Jun 2019 to May 2020</b>	<b>% Change</b>
<b>Market</b>						
UK	59	-4.2	302	26.1	759	0.0
EU	4,694	-44.4	26,933	-31.7	81,921	-25.3
Non-EU Europe	2,856	-41.1	13,067	-44.5	46,530	-26.0
Africa	4,552	-46.9	26,771	-34.6	79,169	-22.5
North America	25,154	-44.4	174,257	-29.2	493,082	-24.7
Latin America	977	-79.4	12,506	-46.7	43,397	-28.0
Middle East	15,766	-26.5	83,653	-18.6	239,969	-12.8
Asia / Pacific	24,278	-40.3	126,180	-36.4	394,516	-27.5
Blanks	2,314	-	2,314	-	2,314	-
<b>Total</b>	<b>80,650</b>	<b>-39.8</b>	<b>465,985</b>	<b>-31.3</b>	<b>1,381,659</b>	<b>-23.8</b>



## June 2020

### Terminal Passengers

(000s)

	Jun 2020	% Change	Jan to Jun 2020	% Change	Jul 2019 to Jun 2020	% Change
<b>Market</b>						
UK	20	-95.4	955	-58.9	3,470	-32.3
EU	151	-94.0	4,892	-62.8	19,199	-35.5
Non-EU Europe	26	-94.9	1,124	-59.3	4,054	-34.5
Africa	9	-96.8	809	-53.3	2,590	-32.1
North America	46	-97.4	3,321	-62.7	13,247	-33.8
Latin America	6	-94.8	320	-53.4	1,016	-31.9
Middle East	43	-92.9	1,728	-51.6	5,907	-28.8
Asia / Pacific	49	-94.9	2,283	-59.3	8,154	-35.1
<b>Total</b>	<b>350</b>	<b>-95.2</b>	<b>15,433</b>	<b>-60.2</b>	<b>57,639</b>	<b>-34.0</b>

### Air Transport Movements

	Jun 2020	% Change	Jan to Jun 2020	% Change	Jul 2019 to Jun 2020	% Change
<b>Market</b>						
UK	242	-93.2	9,519	-50.8	30,888	-25.8
EU	1,840	-89.9	46,420	-55.4	151,639	-33.8
Non-EU Europe	413	-88.8	10,437	-52.5	32,018	-32.8
Africa	269	-77.6	4,156	-45.7	11,731	-28.6
North America	1,697	-76.8	21,988	-46.4	64,410	-28.4



Latin America	160	-67.9	1,670	-44.8	4,649	-30.0
Middle East	929	-63.4	9,368	-36.7	25,145	-23.5
Asia / Pacific	1,655	-56.9	13,836	-41.1	37,687	-27.1
<b>Total</b>	<b>7,206</b>	<b>-82.3</b>	<b>117,516</b>	<b>-50.1</b>	<b>358,289</b>	<b>-30.6</b>

<b>Cargo (Metric Tonnes)</b>	<b>Jun 2020</b>	<b>% Change</b>	<b>Jan to Jun 2020</b>	<b>% Change</b>	<b>Jul 2019 to Jun 2020</b>	<b>% Change</b>
<b>Market</b>						
UK	7	-83.6	206	-27.9	507	-28.4
EU	5,251	-34.1	32,100	-32.2	79,123	-27.0
Non-EU Europe	4,278	-9.2	17,272	-38.9	46,017	-26.3
Africa	4,843	-37.9	31,190	-36.0	75,786	-25.9
North America	27,910	-38.7	201,979	-30.8	475,244	-26.9
Latin America	2,473	-43.0	14,952	-46.2	41,505	-31.5
Middle East	18,947	-16.7	102,033	-18.7	235,580	-15.0
Asia / Pacific	25,241	-33.4	150,463	-36.3	380,979	-29.5
<b>Total</b>	<b>88,989</b>	<b>-31.8</b>	<b>552,550</b>	<b>-31.4</b>	<b>1,337,097</b>	<b>-25.8</b>

## THE ECONOMIC IMPACT OF REDUCED ACTIVITY AT HEATHROW AIRPORT: A SUMMARY

Oxford Economics has been commissioned by the Heathrow Community Engagement Board to quantify the economic impact of reduced activity at Heathrow Airport.

We have developed an economic impact model to estimate the direct, indirect (supply chain) and induced (consumer spending) impacts that typically arise from the presence and operation of the airport. Our study area consists of the six local authority areas of Ealing, Hillingdon, Hounslow, Spelthorne, Slough and South Bucks.

We will be presenting the findings from this study to the HCEB Forum on 9 September.

Some of our key findings are detailed below:

- In 2019 (prior to the coronavirus crisis), Heathrow supported an estimated 133,600 jobs across the six local authority areas—of which 76,000 are directly employed at the airport itself—amounting to nearly a quarter of gross value added (GVA) generated across the study area economy. Almost 60,000 residents of the study area were employed as a result of Heathrow, amounting to around 10% of resident employment.
- We estimate how these impacts are expected to change over the short-to-medium term (to 2025), as the airport and the airline sector recover from the worst effects of the coronavirus pandemic. Drawing on air traffic data, economic and air passenger flow forecasts, and the stated intentions of airlines, we have developed three scenarios.
- As the Coronavirus Job Retention Scheme has so far managed to protect against mass unemployment this year, we expect the loss of employment associated with the airport to peak in 2021. In the central scenario, this amounts to 37,000 fewer jobs than prior to the crisis, and 16,000 fewer residents employed.
- Our upside scenario anticipates a similar magnitude of impact through 2020 and 2021, before recovering thereafter. Both the central and upside scenarios see activity recovering to pre-crisis levels by 2023. However, the downside scenario reflects a deepening of the crisis, amounting to a loss of almost half of all Heathrow-related employment (62,900 jobs) by 2021, with a prolonged recovery extending beyond our study timeframe.
- We also consider the characteristics of workers most vulnerable to a loss of employment associated with Heathrow. The majority of job losses are expected to occur in the transportation & storage sector, which tends to support a high proportion of male, older, full-time and less well-qualified workers. Evidence on the characteristics of the on-airport workforce indicate that many tend to support economic dependents such as children, are in households that derive more than one source of income working at the airport, and have been employed at the airport for a considerable time, which may affect their abilities to find alternative work.

## ABOUT OXFORD ECONOMICS

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on more than 200 countries, 250 industrial sectors, and 7,000 cities and regions. Our best-in-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Headquartered in Oxford, England, with regional centres in New York, London, Frankfurt, and Singapore, Oxford Economics has offices across the globe in Belfast, Boston, Cape Town, Chicago, Dubai, Dublin, Hong Kong, Los Angeles, Melbourne, Mexico City, Milan, Paris, Philadelphia,

Stockholm, Sydney, Tokyo, and Toronto. We employ 400 full-time staff, including more than 250 professional economists, industry experts, and business editors—one of the largest teams of macroeconomists and thought leadership specialists. Our global team is highly skilled in a full range of research techniques and thought leadership capabilities from econometric modelling, scenario framing, and economic impact analysis to market surveys, case studies, expert panels, and web analytics.

Oxford Economics is a key adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base now comprises over 1,500 international organisations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.



# Independent Forum meeting notes: 03/06/2020

**Meeting:** Independent Forum – held virtually on Zoom

**Date:** 03/06/2020

## **Joining:**

Tony Booker, Director, Colne Valley Park Community Interest Company  
Chris Carter, Slot Policy Manager, British Airways  
Rachel Cerfontyne, Chair, HCEB (Chair)  
Robin Clarke, Community Relations Manager, NATS  
Steve Curran, Leader, London Borough of Hounslow  
Sam Hartley, Secretary to the Commission, ICCAN  
John Holland-Kaye, CEO, Heathrow Airport Ltd  
Andrew Johnson, Leader, Royal Borough of Windsor and Maidenhead  
Colin Kemp, Deputy Leader, Surrey County Council  
Nancy Lalor, Operations Director, Thames Valley Chamber of Commerce  
Rob Light, Head Commissioner, ICCAN  
Nigel Mells, Resident (Southside)  
Caroline Morison, COO, Hillingdon CCG  
Lucy Owen, Heathrow Strategic Planning Group  
Steve Sargeant, Director, Beck Theatre  
Val Shawcross, Chair, HATF  
Howard Simmons, Commissioner, ICCAN  
Bradley Smith, Sales & Marketing Director, Grondon Waste Management Ltd  
Neil Spurrier, Representative, HCNF  
John Stewart, Chair, HACAN  
James Swindlehurst, Leader, Slough Borough Council  
Christine Taylor, Resident (Northside)  
Martin Tett, Leader, Buckinghamshire Council (New Unitary)  
Nigel Wicking, Chief Executive, Heathrow AOC

## **In attendance:**

Paul Atkin, Non-Executive Director, HCEB  
Kris Beuret, Non-Executive Director, HCEB  
Mark Burgess, Head of Operations, Heathrow Airport Ltd  
Vickram Chetty, Heathrow observer  
Becky Coffin, Director of Communities, Heathrow Airport Ltd  
Rebecca Cox, Executive Assistant to the Chair, HCEB (meeting notes)  
John Davies, Non-Executive Director, HCEB  
Becky Denness, Heathrow observer  
Colin Flack, Chair, UKACCs  
James Holmes, Heathrow observer  
Carol Hui, Heathrow observer  
Martyn Hurst, Technical Consultant, HCEB  
Mark Izatt, Non-Executive Director, HCEB  
Laura Jones, Heathrow observer  
Bharan Kumar, Non-Executive Director, HCEB  
Guido Liguori, Company Secretary, HCEB  
Sam Matthews, Head of Communications and Strategy, HCEB  
Anna O'Rourke, Executive Director, HCEB  
Darielle Proctor, Heathrow observer  
Nick Ward, Head of Engagement, HCEB

## Apologies:

Simon Laver, Assistant Director, IATA  
Luke Petherbridge, Head of Public Affairs, ABTA  
Perry Phillips, Regional Organiser, GMB

## No response:

Richard Barratt, Councillor, Spelthorne Borough Council  
Julian Bell, Leader, London Borough of Ealing  
Simon Dishman, Policy Manager (Transport), London Chamber of Commerce  
Ray Puddifoot, Leader, London Borough of Hillingdon  
Onkar Sahota, Member, London Assembly

## 1. Welcome and Chair's Introduction

- Rachel Cerfontyne welcomed all those who had accepted the invitation to join the call before outlining the code of conduct and the method to be used to submit a question during the meeting.

## 2. Update from the CEO of Heathrow Airport

- The Q1 report on day to day operations and operational impacts had been circulated to attendees prior to the meeting. However, John Holland-Kaye explained that due to the COVID-19 pandemic this report was not reflective of the current operations of the airport and its impact on the local area, so the focus of his presentation would be the effects of COVID-19 and the work being undertaken in preparation for the recovery period.
- Following the busiest January ever, in March demand collapsed. The airport was currently facing its third month with almost no passengers. This was having a significant financial impact. In a normal month the airport's revenue was £250m but had dropped to almost zero. Normal outgoings were also around £250m, which were largely fixed costs. Organisational restructuring had been undertaken which had reduced these to £150m, which was currently being paid by shareholders. This in turn had a huge impact on people's livelihoods, and with the introduction of quarantine next week the situation was expected to worsen until this was lifted.
- The work being undertaken to support stakeholders now and during the recovery period was outlined, in particular:
  - Changes being made to terminals in order to keep passengers safe.
  - Protecting as many jobs as possible, as with one in four local households having airport employees the effect of job losses was devastating to the local area. No front line redundancies had been made to date. The CEO had taken no pay for three months and the Executive Team for one month.
  - Assisting local authorities by providing supplies for food banks and local school children and using the Heathrow Rangers and furloughed colleagues to volunteer in the community.
  - Reducing payment terms for small companies within the supply chain and working closely with airlines to minimise their costs.
  - Working with the Government to get people flying again.
  - Focusing on sustainability and how to use the current crisis to accelerate the move to zero carbon aviation, and working with the Government in the development of sustainable fuels.
- In response to questions the following points were discussed:
  - The planned airspace change process had been pushed back as a result of the COVID-19 pandemic, though the airport were working with the Government to move this forward. The revised timetables would be brought to the next meeting:  
**Action: Mark Burgess**
  - There was still the ambition to grow skills across the airport's employees, though it was not yet clear how and when it would be possible to regain the momentum built up by the Skills Task Force. The airport planned to work with local authorities in a few months



time to look at how to get people into employment, help those without qualifications to develop skills, resume work in local schools and help people from the aviation industry to transition to other areas requiring a similar skill set.

- The airport would continue to support the Western and Southern Rail links, continuing to lobby Government to ensure that they were included in their COVID recovery plans. These links would be key to economic recovery and connecting Heathrow to all of its communities, though there would be challenges around encouraging people to feel confident on public transport. Draft plans were being drawn up regarding the contribution that the airport would make to the development of these rail links. The Chair of the Heathrow Area Transport Forum confirmed that she would be working with the airport to support them in lobbying for these, as they were not expansion related and were vital to the two runway airport.
- The possibility of new airlines flying from Heathrow and whether airlines flying older, less efficient and noisier aircraft would be accepted was raised. John Holland-Kaye explained the slot allocation process and how this could possibly be used in the short term to enable new airlines to fly. The types of planes using the airport was regulated by the pricing structures which encouraged the use of quieter, cleaner aircraft and it was anticipated that, while there could be some older, noisier planes in the short term, as the regular flight schedule resumed the mix of fleet would be better than before.
- The issue of sustainable aviation fuels was discussed, in particular the development of synthetic fuels made from recycling existing carbon which could be blended with kerosene. The airport was working closely with the Government and the Cambridge Institute for Sustainable Leadership to expedite their introduction worldwide.
- Heathrow would be appealing the court of appeal decision and were hoping for a hearing in the Supreme Court before the end of the year. If this was unsuccessful, the Government had the option to revise the NPS. The airport would continue to work closely with communities to ensure that any plans to increase capacity on two runways would have maximum benefit for them and minimum negative impact in terms of noise and air quality.

### 3. Recovery from COVID-19

- An update was received from Mark Burgess, Head of Operations, on the work being carried out with airlines to restore passenger confidence in flying, in particular:
  - Work being carried out with the Government, industry groups/organisations and other airport hubs across the globe to align and share best practice to develop adequate safety standards to get passengers flying again with the best experience possible.
  - Within the airport a core programme had been developed to ensure that colleagues felt comfortable to go to work, airlines felt confident to fly from Heathrow and passengers felt safe using it. Within the terminals this involved the use of masks by everyone, social distancing markers, changes of layout where necessary, perspex screens, testing facilities, hand sanitiser stations and the introduction of new, innovative cleaning processes.
  - Building a team to prioritise and develop methods of keeping passengers informed prior to check in and support the Government and airlines with tracing procedures.
  - Putting together a communications campaign to inform passengers, colleagues across the whole airport's operations and the local community, which would be developed further over the coming weeks in line with Government guidance on public health.
- In response to questions, the following issue was clarified:
  - Common standards had now been agreed globally for keeping passengers safe. John Holland-Kaye and Mark Burgess would be walking the passenger journey through both terminal 2 and terminal 5 next week and videos would be published on the website and on social media once it was confirmed to be safe. These standards would continue to evolve as recovery progressed and advice changed.
- A presentation was received from Becky Coffin, Director of Communities, which can be found [here](#). This outlined Heathrow's short term and long term approach to community



investment, how plans in relation to this had been adjusted, and what work was being undertaken in the areas of skills and employment across the airport, its supply chain, in schools, local businesses and the wider community.

- In response to questions, the following issues were discussed:
  - Heathrow were working closely with port health in monitoring and testing, and port health had a physical presence in the airport. Public Health England planned to use Heathrow as a trial for temperature checking.
  - With local residents in the CPZ and WPOZ facing more years of uncertainty, John Holland-Kaye confirmed that, whilst the hardship plans had been suspended temporarily, those applications already in process would be fulfilled. The airport aimed to get clarity on expansion as soon as possible in order to minimise the period of uncertainty.
  - Heathrow was supportive of increasing facilities for cyclists in the local area. The possibility of opening up the tunnel to cyclists was being discussed internally and an update on this would be made at the next meeting. **Action: Becky Coffin**
  - The Leader of Buckinghamshire County Council had not met with Heathrow to discuss recovery and it was agreed that a meeting would be organised. **Action: Becky Coffin**

#### 4. HCEB Chair's Update and Closing Remarks

- The Chair thanked all attendees for joining the meeting and for the wide range of questions submitted. Following the court of appeal's decision and the COVID-19 pandemic, the HCEB's plans for this year had changed and new strategic objectives were being developed for the recovery period. Rachel Cerfontyne had talked with local authority leaders and stakeholders prior to this meeting and a list of shared concerns and commonly raised issues had been circulated to attendees in advance. These would help shape the work of the HCEB in the coming months. Using the learnings from the Vienna DialogForum, the HCEB would continue to provide platforms for dialogue, encourage collaboration and find ways of working through conflict. The work undertaken in relation to the DCO process would assist in planning work around the recovery process. The HCEB would also continue to build on its links with local stakeholders and national organisations such as ICCAN and UKACCs. The Forum would meet again on 9 September, in person if possible, but virtually if necessary.

The agenda, quarter 1 report from Heathrow Airport and the video of the meeting in full can be found [here](#).

The answers to questions submitted for both the cancelled Forum in March and this meeting can be found [here](#).



<b>AIRSPACE / NOISE</b>	
<p><b>Why are we seeing PBN incoming flights on the same flightpaths on both westerly and easterly operations?</b></p>	<p>This is simply not the case. There are no set routes for aircraft making their way towards the final approach into Heathrow, each aircraft follows a set of instructions issued by air traffic controllers. As you might know, PBN is being introduced across the world and we have committed to introduce PBN to meet our commitments to the Government's airspace modernisation strategy. However, Heathrow's airspace modernisation programme is currently on pause, and most other airports in the UK have also put their modernisation plans on hold whilst they focus their efforts on the impacts of the Coronavirus outbreak. Heathrow remains committed to airspace modernisation and we intend to work with other airports in the South-East to consider the future of the airspace modernisation programme once we are through this challenging period. We cannot say when this is likely to be but will keep you informed via the HCNF.</p>
<p><b>In view of the current situation (Covid-19) do we know what the timetable for the airspace change process now is?</b></p>	<p>Heathrow's airspace modernisation programme is currently on pause, and most other airports in the UK have also put their modernisation plans on hold whilst they focus their efforts on the impacts of the Coronavirus outbreak. Heathrow remains committed to airspace modernisation and we intend to work with other airports in the South-East to consider the future of the airspace modernisation programme once we are through this challenging period. Consequently, all of our other planned airspace changes are also on hold as we undertake a review of the best way forward given the change in circumstances.</p>
<p><b>Heathrow has helpfully indicated that it has no plans to seek changes to the restrictions currently in place for aeroplanes taking off and landing at Heathrow. Will Heathrow consider changes in the future, and if so, what changes would the business like to see?</b></p>	<p>We appreciate that noise created at night can cause greater disturbance to people and because of this, Heathrow is heavily restricted by the Government in terms of the numbers of flights allowed to operate during the night period. The Government consults on the rules every 5 years and it's their job to balance the economic benefits of night flights with the social impacts. The current night flight restrictions (which also apply to Gatwick and Stansted) will be in place until October 2022 so before they are due to end, the Government will carry out a public consultation on the restrictions that will apply for the next five-year period.</p> <p>All of our planned airspace changes (including Compton) are on pause whilst we focus our efforts on the impacts of the Coronavirus outbreak. However, we will undertake a review of our whole airspace change programme to assess the best way forward given the change in circumstances.</p>
<p><b>Does Heathrow concur that HCNF meetings should now be undertaken via Zoom or Teams? This will prevent driving to and from the airport or worse currently, taking public transport and save considerable amounts of time for all attendees as the meeting impact times are reduced by as much as an hour either side. In the age of reduced travel and B2B meetings being conducted more and more online the airport must surely be</b></p>	<p>We are reviewing future ways of working for the Heathrow Community Noise Forum whilst trying to ensure a suitable balance is provided for all attendees. We very much appreciate stakeholder feedback with their ideas. Over the coming months we will seek feedback from all HCNF members with the hope of implementing a solution that is inclusive and works for all attendees.</p>

<p><b>pushing this means of working to ensure safety and environmental improvement.</b></p>	
<p><b>There is great anxiety being caused to residents around the airport by the possibility of the curved aircraft approach (Independent Parallel Approach described in the Heathrow “Early Growth” document) causing aircraft noise, with great intensity through PBN precision, not only for people already suffering but also for people who will be newly affected. This of course would be <i>in addition</i> to the existing approach so gives no respite to other areas. Can you assure us that Heathrow will reconsider this proposal?</b></p>	<p>As I’m sure you’re aware, the impact of the Coronavirus (COVID-19) outbreak is proving a significant challenge for the global aviation industry including Heathrow and our colleagues, airlines, suppliers and fellow airports. We have had to put all of our airspace change projects on pause whilst we take immediate steps to safeguard the financial resilience of our business. The Independent Parallel Approaches project is also on pause and we would need to engage and consult with affected communities if the decision is taken to pursue the project in future.</p>
<p><b>Can night flights be stopped?</b></p>	<p>We appreciate that noise created at night can cause greater disturbance to people. Heathrow is heavily restricted by the Government in terms of the numbers of flights allowed to operate during the night period. The Government consults on the rules every 5 years and it’s their job to balance the economic benefits of night flights with the social impacts.</p> <p>Our operations form part of an inter-connected global transport system and our arrival/departure times have to be coordinated with other airports operating in different time zones. The range of direct destinations provided out of Heathrow relies on transferring passengers and cargo, and re-scheduling flight times reduces volumes, consequently reducing UK’s connectivity.</p>
<p><b>The taxiways associated with the Cranford agreement were to be built at the same time as the third runway. What are Heathrow’s plans now?</b></p>	<p>The impact of the Coronavirus (COVID-19) outbreak is proving a significant challenge for the global aviation industry including Heathrow and our colleagues, airlines, suppliers and fellow airports. We have had to put most of our projects on pause (including these taxiway works) whilst we take immediate steps to safeguard the financial resilience of our business, therefore we do not have any updated plans for this project at the moment.</p>
<p><b>When will Heathrow’s operations comply with the World Health Organisation Guidelines on noise and if not soon, why not? We are mindful that the Independent Commission on Civil Aviation Noise has recently written to Grant Shapps and Kelly Tolhurst on the subject of noise saying, amongst other things that “We see current events as an opportunity for a re-think about the way aviation noise is considered when both strategic and operational decisions are taken about the future of aviation. In the understandable desire to rebuild aviation swiftly and efficiently, not being seen to prioritise aviation noise management is likely to generate a significant negative reaction from local communities. The public will need to trust that the rebuilding of the aviation</b></p>	<p>Heathrow is taking a number of steps to incentivise cleaner and quieter aircraft to come to the airport. To read about all the plans <a href="#">click here</a>.</p> <p>In light of the WHO guidelines, last year the Government convened the Interdepartmental Group on Costs and Benefits Noise Subject Group (IGCB(N)) to review the existing government guidance on economic analysis and noise pollution to consider whether any updates are necessary.</p>

<p><b>industry – at whatever pace – is done in a sustainable way.”</b></p>	
<p><b>QUARANTINE</b></p>	
<p><b>Noise, pollution, environmental and climate issues aside, what is Heathrow proposing to do to negate completely spreading of future pandemics based on someone’s ability to be contaminated in China on day 1 fly into the UK on day 2 and be back in China on day 11 not showing signs but having been through London. With Heathrow professing that quarantine will kill their industry how do they propose to stay flying whilst keeping people in the UK safe?</b></p>	<p>We support the Government’s efforts to maintain control of Covid-19, including enhanced border controls if they are felt necessary. But an open-ended blanket quarantine would turn a health pandemic into an unemployment pandemic. The UK Government must agree an exit strategy to get UK aviation off the ground by the end of June and the UK economy back on its feet. We’re proposing that Government adopts a risk-based approach which will allow for air bridges to be established between low risk countries. Airbridges and a move towards a common international standard for health screening are responsible first steps that countries around the world are already implementing. If it works for Australia, Hong Kong and New Zealand – the UK Government should crack on with developing a similar plan to protect our country. The airport is also reviewing a number of technologies and processes which aim to reduce the risk of contracting or transmitting Covid-19 while travelling.</p>
<p><b>With ref to the 14-day quarantine imposed by the government, many UK workers work abroad and will fly back to the UK to see family. Will they be able to fly again out of the UK during the 14-day period</b></p>	<p>All questions on the quarantine should be directed to government for the most up to date advice as the process is being managed by the Home Office.</p>
<p><b>COVID – 19</b></p>	
<p><b>Re “Heathrow’s plans to partner with local authorities...” and “Economic growth in the Heathrow Area”, Royal Borough of Windsor and Maidenhead has talked about a better, not bigger Heathrow in their opposition to the 3rd Runway. That is still their position and while the damage done by the loss of jobs at Heathrow and BA is something that is regrettable, what assurances can Heathrow give that there will not be a return to the noise intensity existing prior to the lockdown?</b></p>	<p>The lack of aircraft is a clear sign that our economy is suffering the worst kind of severe shock. We need air travel to enable the post-Covid recovery. Whilst we want aviation to recover to pre-Covid levels we will continue to deliver on our noise action plan and work with partners such as the airlines and NATS to ensure Heathrow continues to get quieter into the future.</p>
<p><b>Despite fears about climate change and the long-term impact of the Covid lockdown on the aviation industry, Heathrow continues to talk of its need to build a third runway. If Heathrow is so “very well funded” that it can continue to run for 12 months without passengers, as stated by John Holland Kaye on Thursday’s Newsnight, what does it propose to do for the villages to the north of the airport to counteract the considerable blight caused by a further 10 to 15 years under threat of demolition?</b></p>	<p>Responding to the impacts of COVID-19 is our priority right now. To read more about we have been helping our community <a href="#">click here</a>. The business is focused on solutions that it to continue operating with reduced passenger numbers, as John mentioned. This has included immediate action to reduce costs by 30% through cutting management pay, renegotiating all contracts and consolidating operations. We do believe that once the benefits of air travel and connectivity have been restored in years to come, an expanded Heathrow will be required and will bring investment into the local area. We are committed to continuing to engage with and work with our local communities on these plans in the future. We are also clear that the economic recovery does not come at the expense of the next global crisis – climate change. We will continue to focus on the development of sustainable aviation, which will</p>

	reduce carbon emissions, whilst ensuring the commitments made to our neighbours around noise and air quality are met.
<b>When does John Holland-Kaye expect traffic at Heathrow to reach 50% of its normal level?</b>	We expect to see a staged recovery in passengers over the remainder of the year reflecting the potential impact of social distancing and short-term changes in passenger behaviour. Our current forecasts estimate that 2020 will see a total of 29.2 million passengers (a reduction of 64%) and 2021 will see a total 62.8million passengers (a reduction of 22%). This is in comparison to the 80.9 million passengers who flew via Heathrow in 2019. Passenger demand is not expect to return to previous levels until at least 2022.
<b>SUSTAINABILITY/ CARBON</b>	
<b>John Holland Kaye has made much of “Sustainable Aviation Fuels” e.g. writing in the Bright Blue/WSP paper “Delivering Net Zero” that “Sustainable Aviation Fuel is the key way to accelerate reductions in carbon over the next 10 to 15 years and to get us on track for net zero by 2050”. How does he reconcile this with the specific advice of the Committee on Climate Change given to the Government (published advice to Secretary of state for transport dated 24<sup>th</sup> September 2019) that “Our scenario has a 10% uptake of sustainable fuels in 2050. It is not appropriate to plan for higher levels of uptake at this stage, given the range of competing potential uses for biomass across the economy”?</b>	In February this year the UK aviation sector became the first in the world to commit to net zero by 2050 through Sustainable Aviation (airlines, airports, manufacturers, NATS) and to publish a detailed “Decarbonisation Roadmap” to get there. The pathway to net zero is based on more efficient aircraft, engines and operations, sustainable fuels and carbon offsetting and removal. The roadmap shows how Sustainable Aviation Fuel (SAF) can reduce emissions per passenger km by around a third by 2050 and was accompanied by a separate, detailed “Sustainable Aviation Fuels Roadmap” that sets out the potential of SAF and the action the Government needs to take to help make SAF commercial. Other expert bodies like the Energy Transitions Commission project that the development “synthetic fuels” could allow SAF to provide 100% of aviation’s needs by 2050. The most significant step aviation can take to accelerate carbon reductions in the 2020s is to rapidly scale up production and use of Sustainable Aviation Fuels (SAF). Heathrow and the industry are focussed on an urgent five- to ten-year plan to do that. A SAF revolution led from the UK offers huge economic opportunities for Britain and the Government should make SAF a key plank in its plans for a clean and resilient recovery. The CCC is updating its projections of aviation emissions and the role of SAF as part of the scenarios it is developing for the 6 <sup>th</sup> carbon budget later this year.
<b>When will Heathrow respond to the prior written question submitted through the HCEB on Climate Change entitled “How can Heathrow claim with any degree of accuracy that it will be carbon neutral by 2050 or earlier?”</b>	Climate change remains the greatest mid- to long-term challenge we all face. The science is clear – to avoid the worst effects of climate change the whole global economy must reach net zero emissions by 2050. Aviation is no exception. Our challenge is to decarbonise flying so that we protect the benefits of aviation in a world without carbon. In February this year the UK aviation sector became the first in the world to commit to net zero by 2050 through Sustainable Aviation (airlines, airports, manufacturers, NATS) and to publish a detailed “Decarbonisation Roadmap” to get there. The pathway to net zero is based on more efficient aircraft, engines and operations, sustainable fuels and carbon offsetting and removal. Heathrow is a key part of the UK sector and all its operations, including flights, are therefore part of the net zero by 2050 commitment. Shortly after Sustainable Aviation published its roadmap, Heathrow published its own “Target Net Zero” plan. It set out that we want Heathrow’s own infrastructure to get to net zero and ultimately to absolute zero emissions before 2050. We will achieve that through investment in a solution to heat the



	<p>airport renewably, without using gas, and by completing the shift to electric vehicles. Later this year we plan to publish a detailed plan on making Heathrow's own infrastructure net zero and then absolute zero, and the date we plan to do that by. The Government recently announced plans for Jet Zero Council which will support innovation and research that which will help to decarbonise flight.</p>
<p><b>With new capacity available due to normal airlines not flying or not as much for the foreseeable future.</b></p> <p><b>Will you accept new airlines into Heathrow? And will this include airlines flying older, noisier, less carbon efficient aircraft?</b></p>	<p>Air traffic movements in April and May 84% down on their normal levels. Some new passenger airlines have moved to Heathrow – typically airlines choosing to move from another London airport to operate at Heathrow. In addition, existing cargo airlines have increased their movements and other cargo airlines have started operations. Most cargo from Heathrow is carried in the hold of passenger aircraft with few dedicated cargo flights. With very few passenger flights operating, cargo operations have therefore increased to meet demand to bring supplies into the UK, including medical supplies need to deal with the pandemic, showing the importance of Heathrow's cargo infrastructure and global connectivity. Generally, where airlines are taking aircraft out of service given the pandemic, we're seeing them take their older, noisier and less efficient aircraft out. As traffic recovers, we expect airlines to continue to favour more efficient aircraft. Heathrow's differential landing charges continue to create the right incentive by charging significantly more for noisier planes with higher emissions.</p>
<b>TRANSPORT</b>	
<p><b>Heathrow has indicated its support for better public transport links to and from Heathrow and this is very welcome. Is Heathrow able to indicate what work it is doing, or planning to do so that the Southern Rail and Western railway schemes, originally set out in the plans for expansion , can be progressed regardless of expansion going ahead?</b></p>	<p>The Heathrow Surface Access Team are currently engaging with stakeholders on developing a 2R strategy for our next regulatory period from 2022 and, for the interim period as the airport recovers from the impact of COVID-19. Key infrastructure schemes such as Western rail remain key components that support our long-term strategy.</p>
<p><b>Hounslow Borough Council are exploring opportunities for 'pop up' cycle lanes particularly along the A315 as the route of Cycleway 9 and into Heathrow Airport. It would be good to confirm Heathrow's support for measures to allow the workforce to get to the Central Terminal Area - how about reopening the tunnel for cyclists?</b></p>	<p>We understand that allowing access to the central terminal area by bike would be advantageous to colleagues who cycle to and from work. However, there are a number of safety concerns that we need to consider. We are currently looking at all options and will make a decision shortly on whether permitting access by bike is the right thing to do. We will inform HCEB as soon as a firm decision is made.</p>
<p><b>In the light of the new situation, what are Heathrow's targets for the percentage of Passengers and Staff using public transport to access the airport?</b></p>	<p>Our revised 2R strategy will still aim to meet targets aligned to the ANPS such as, public transport mode share. However, given the level of uncertainty with future airport demand it is recognised that the targets must be adaptable to different future scenarios.</p>
<b>JUDICIAL REVIEW</b>	
<p><b>What happens if the court case fails in October, is there a plan B.</b></p>	<p>Responding to the impacts of COVID-19 is our priority right now. We do believe that once the benefits of air travel and connectivity have been restored in years to come, an expanded Heathrow will be required. This privately funded project will see billions of pounds pumped into the UK's economy, stimulating sectors across</p>

	<p>the country and creating tens of thousands of new jobs. To that end, we are pleased to have been granted permission by the Supreme Court to go ahead with our appeal. Heathrow is more than just an airport; it is the cornerstone of the UK economy and will be the engine room that powers our regions back to growth in the future.</p>
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