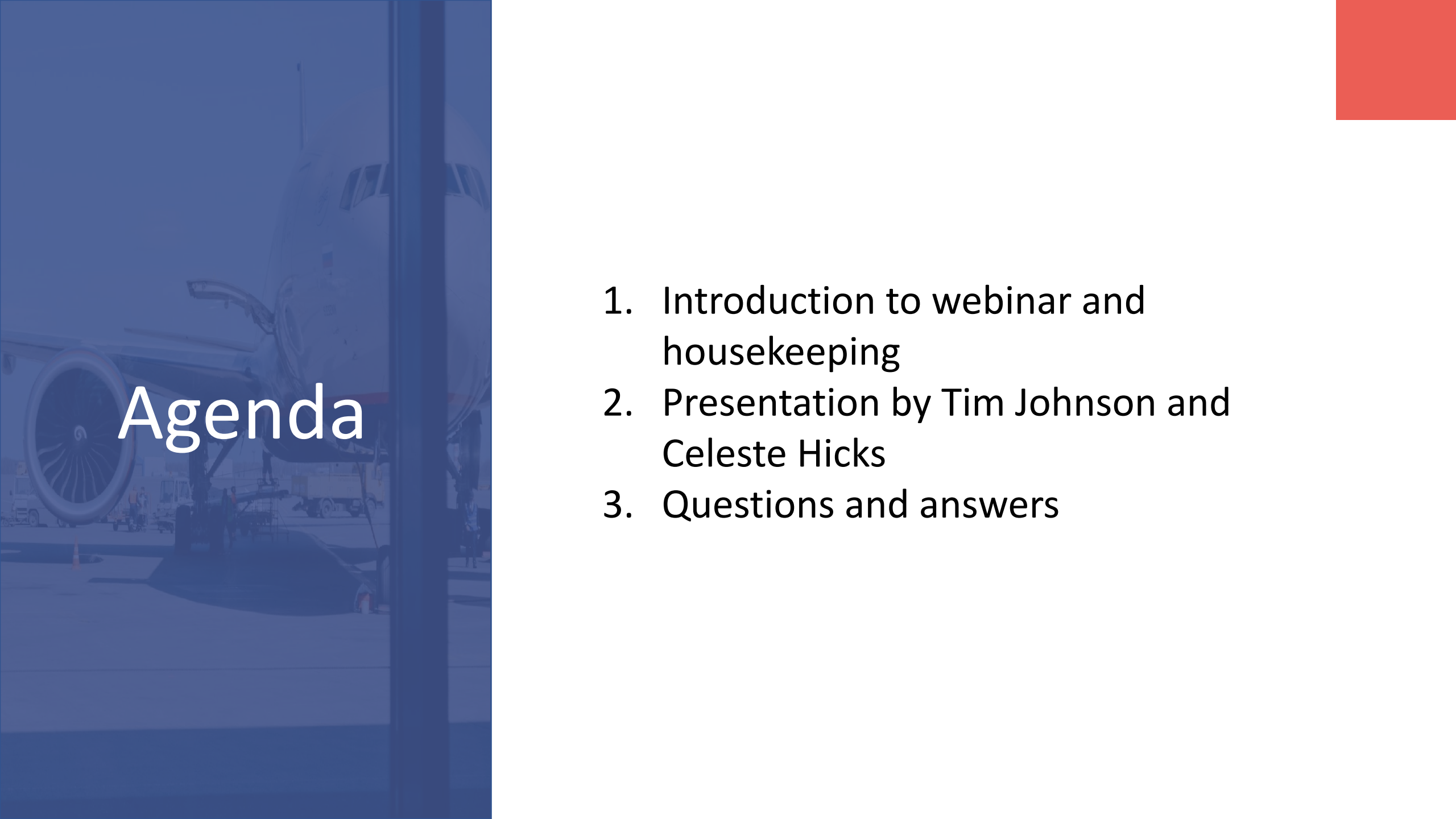




Welcome to AEF's webinar: Understanding and responding to the draft Heathrow Expansion National Policy Statement (HENPS)

Please stay muted when you are not speaking, type
any questions in the chat, and state who you are
and who you represent (if relevant)





Agenda

1. Introduction to webinar and housekeeping
2. Presentation by Tim Johnson and Celeste Hicks
3. Questions and answers



Background

- The draft HENPS updates the 2017 Airports National Policy Statement providing parliamentary support for a third runway at Heathrow. Proposes support for a full length runway that can be delivered in phases. A DCO application is still required.
- Alongside the draft HENPS, the Government published an Appraisal Of Sustainability, Habitats Regulations Assessment, Equality Impact Assessment, Health Impact Analysis and updated costs and benefits appraisal and UK passenger and CO2 forecasts.



Timetable

- The public consultation on the HENPS closes on the 1st September 2026 (10 weeks)
- The Transport Select Committee is holding an inquiry to scrutinise the draft HENPS. The call for evidence closes on the 23rd July 2026
- The Climate Change Committee has been requested by the SoS to submit its views on the proposed expansion. CCC says it will publish its advice between 9-16 September 2026
- What happens after the consultation? The Government expects Parliament to vote to adopt the draft HENPS by the end of the year



Critical National Growth Infrastructure

- CNGI is a new designation that has not been tested in any legal cases or planning applications
- After the mitigation hierarchy has been followed, the designation means that there will be a presumption in favour of consent, even when residual environmental impacts remain.
- AEF is leading the work on understanding whether the government can designate without convincing evidence of the project's impact on growth.



Climate impacts

- With expansion, UK aviation emissions are expected to reach 41Mt per year by 2050, more than twice the CCC's balanced pathway
- Will it blow carbon budgets? Comparisons with CB6 is difficult due to conflicting baselines and timelines.
- We believe the additional emissions from the runway will be around 3Mt per year by 2050.
- Government acknowledges Jet Zero is not delivering fast enough.



Air pollution impacts

- The scheme will be assessed against the now outdated 2010 legal limits - the WHO's health based targets are now a quarter of the UK's legal limits. All of the monitors around Heathrow would fail these targets.
- No proper mitigation for Ultra fine particles from planes
- Increased mode share targets are welcome, but associated rail infrastructure does not need to be assessed at the DCO stage. Passenger numbers can increase by 30m before a “backstop” kicks in



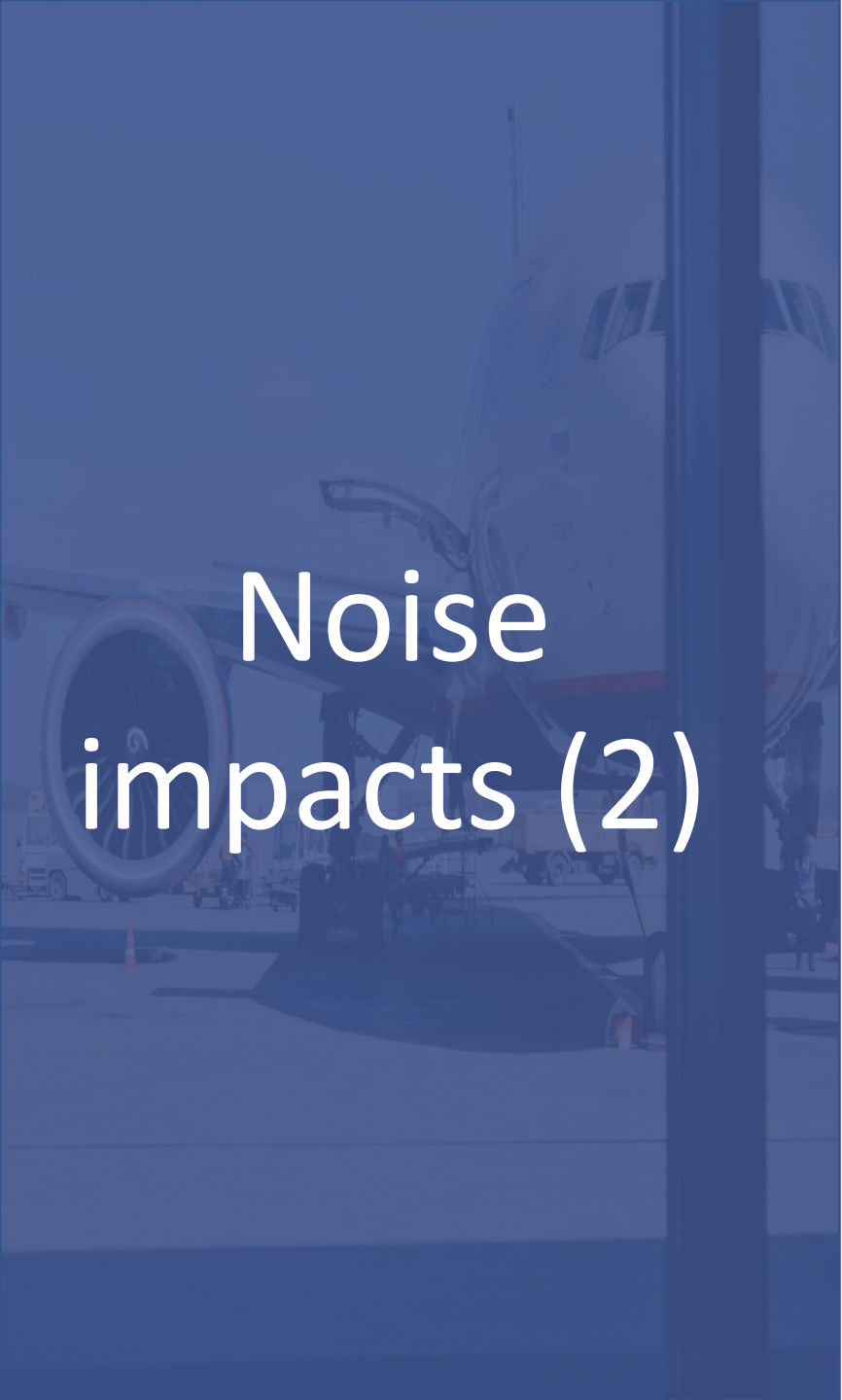
Economic and regional impacts

- Improvements in methodology
- Using the Green Book methodology, the 'net present value' of the scheme is -£28b to -£62.5b over 60 years
- But Government presents only the consumer/passenger benefits
- Growth in GDP is small overall (just 0.05% by 2056) and mostly occurs in London; in some regions it is zero



Noise impacts

- Actual flight paths are not provided, the consultation relies on indicative flight paths outlined by the Airports Commission
- Commits to a 6.5 hour night flight ban and a system of runway alternation
- By 2055, and using existing thresholds, the 51 dB LAeq contour for R3 is 50% larger than under the 2R scenario, but 9% smaller than in 2024.
- At night, by 2055, the 45 dB LAeq contour is 41% larger than under the 2R scenario, but 4% smaller than in 2024.



Noise impacts (2)

- ANAS/ANNE results showed that 10% of the population are highly annoyed at 43 dB Leq
- “the Government aviation noise policy has yet to be reviewed in light of the newly published evidence” but sensitivities are provided showing that the affected area increases four-fold.
- By 2055, under the 3R scenario, the 43 dB LAeq contour is estimated to include 3,405,000 individuals and 1,495,000 households, representing a 33% increase compared with 2R (2024 estimate is 4,650,000 people and 1,876,000 households)



2026 Air Passenger and CO₂ forecasts

- Some welcome changes compared to Jet Zero modelling: carbon pricing reflecting market-measures in place, efficiency improvements reduced, SAF reduced from 50% by 2050 to 30%.
- Under 'continuation of current trends' this increase emissions from 37MtCO₂ in 2050 under jet zero to 41MtCO₂. And under a 'tech development scenario' with additional mitigation, CO₂ is still 28Mt in 2050 compared to 19Mt in Jet Zero
- Heathrow increases from 17.46Mt in 2024 to 18.43Mt in 2050 (and over 20Mt in 2060)

2026 Air Passenger and CO2 forecasts (2)

- R3 is included in the baseline, alongside approved capacity increases at other airports.
- Capacity for Heathrow is assumed to be 130mppa and 756,000 ATMs
- Nationally, central growth forecast is 491m passengers by 2050 (compared to 292m in 2024, an increase of 68%)
- ATMs rise 40% from 2.0m in 2024 to 2.8m in 2050
- A big difference compared to the ANPS 2018 is that Heathrow is expected to fill up gradually. This allows efficiency and noise improvements to partially offset growth (a risk!)



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