Pier 6 Extension (computer-generated visual)

2025 LONDON GATWICK CAPITAL INVESTMENT PROGRAMME

Published following consultation with London Gatwick's airlines and GATCOM's Passenger Advisory Group

Issued November 2025

LONDON GATWICK

2025 CAPITAL INVESTMENT PROGRAMME

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FOREWORD

I'm delighted to be stepping into the role of Chief Executive Officer at London Gatwick, building on the strong foundations laid over the past 15 years by my predecessor, Stewart Wingate. Under Stewart's leadership, London Gatwick has navigated a period of extraordinary transformation—marked by significant growth, major investment programmes, and unprecedented challenges, including the Covid pandemic. I want to acknowledge the tremendous progress made in strengthening both service and resilience for our airline partners and passengers.

Looking ahead, our ambition goes beyond operational excellence. We're focused on creating an airport experience that is welcoming, accessible, and enjoyable for all - an airport for everyone, whatever their journey. This isn't about overspending or extravagance; it's about smart, purposeful investment that enhances the passenger experience in ways that attract and retain travellers, which ultimately benefits our airline community.

The 2025 Capital Investment Programme sets out our plan to invest almost £2 billion in facilities and services through to March 2030. It's anchored in our core vision of ease, efficiency, and experience—principles shaped by direct input from passengers and airline partners. From intuitive wayfinding and modernised terminals to seamless check-in and improved lounge environments, every element is designed to elevate the journey and make Gatwick a destination people choose not just for convenience, but for quality.

This strategy reflects our belief that a great airport experience is not a luxury—it's a competitive advantage. And as we grow sustainably, we remain committed to delivering value for our airlines, confidence for our passengers, and pride for our people

We've already seen strong performance in the first half of 2025, with all service standards met and a notable improvement in on-time departures. These results are a testament to the collaborative efforts across our airport community and investment in both physical infrastructure like our new rapid exit taxiway and enhanced processes such as becoming part of the A-CDM[1] network. Our proposal to extend the current 'Commitments' regulatory framework until March 2029 has been accepted by the Civil Aviation Authority, enabling airlines to plan and grow with confidence.

We welcome the Government's recent approval of our Northern Runway plans which will create 14,000 jobs and inject £1 billion annually into the regional economy. At the same time, we are mindful of external pressures; geo-political, macro-economic and industry specific, including the potential significant rise in business rates.

As we prepared our 2025 CIP, a decision on our Northern Runway Programme (NRP) planning application was still pending. We considered it inappropriate to re-publish an investment profile that we believed had been compromised by delays in the approval process for this project and that could not fully reflect the potential impacts of any planning conditions. We are now carefully examining the details of the planning consent which will shape future investment plans.

Notwithstanding the Northern Runway, we set out here in our 2025 pre-NRP CIP an ambitious and comprehensive £1.9 billion investment programme including major projects to expand both departure lounges, add new taxiways and decarbonise airport operations as we maintain our focus on great service, operational excellence and sustainable growth.

This foreword marks the beginning of a new chapter, one that builds on our legacy and looks boldly to the future. I look forward to working with our partners to deliver the next phase of growth and innovation at London Gatwick.

Pierre-Hugues Schmit
Chief Executive Officer

[1] A-CDM - Airport Collaborative Decision Making: a joint decision-making process involving all key airport stakeholder sharing accurate, real-time information to improve the efficiency, predictability, and resilience of airport operations.

INTRODUCTION

London Gatwick's Capital Investment Programme (CIP) is a rolling five-year investment view which we publish each year as part of our Commitments regulatory framework. The programme is consulted upon with our airline customers and GATCOM's Passenger Advisory Group (PAG) and is informed by a continuous and extensive range of passenger feedback and research to understand their needs.

In May 2025, the Civil Aviation Authority (CAA) published its final decision on the economic regulation of Gatwick Airport Limited (GAL) for the period 1 April 2025 to 31 March 2029, following extensive consultation with our airline customers and passenger representatives. The decision supported the extension of the set of Commitments which had evolved from the original seven-year Commitments (1 April 2014 to 31 March 2021) and through the subsequent four-year period (1 April 2021 to 31 March 2025). These continued Commitments include expanded service commitments, switching the pricing structure from the Retail Prices Index (RPI) to the Consumer Prices Index (CPI) and a minimum capital investment undertaking. The CAA issued London Gatwick with a modified Economic Licence in July 2025 reflecting the extended Commitments which was effective from 1 April 2025.

We submitted a planning application, known as a Development Consent Order (DCO), to the Planning Inspectorate in July 2023. This sets out our plan to bring our existing Northern Runway into routine use to unlock new capacity and improve airport resilience. Our plan will enhance the crucial economic role our airport plays in the South-East by creating around 14,000 new jobs and injecting £1 billion into the region's economy every year.

Following a detailed examination of our Northern Runway Programme (NRP) plans by the Planning Inspectorate, the Secretary of State for Transport (SoS) issued a "minded to approve" letter in February 2025. In doing so, she also requested feedback on additional conditions recommended by the Planning Inspectors. Our response submitted in April 2025 outlined our acceptance of stricter limits on aircraft noise, improved noise insulation and targets to increase the use of public transport by passengers. On 21 September 2025, the Government approved our scheme.

The 2024 CIP included headline NRP investment, but we outlined a range of risks associated with the investment profile (2024 CIP Section 3.3.2 Northern Runway Risks). As we prepared our 2025 CIP, a decision on our Northern Runway Programme (NRP) planning application was still pending. We considered it inappropriate to re-publish an investment profile that we believed had been compromised by delays in the approval process for this project and that could not fully reflect the potential impacts of any planning conditions. Notwithstanding the Northern Runway Programme, we have an ambitious and comprehensive £1.9 billion pre-NRP investment programme including major projects to expand both departure lounges, add new taxiways and decarbonise airport operations as we maintain our focus on great service, operational excellence and sustainable growth.

Now that the Secretary of State has approved the scheme, we are carefully examining the details of the planning consent, assessing their impact and fully reviewing the scope, schedule, sequencing and cost of the programme. As part of this exercise, GAL will consider how the complex programme can be phased and integrated with "non-NRP" projects to maximise the benefits and minimise operational disruption for our passengers, airlines and partners as well as optimising capital efficiency. We expect this consolidated view to inform the 2026 CIP.

Whilst GAL's minimum investment commitment covered total capex, including NRP, this 2025 pre-NRP programme reaffirms our intention to not only meet, but to exceed, our minimum investment commitment over the five-year period. We will continue to develop the airport through the flexibility that the Commitments framework gives us, by working with our airline customers and GATCOM's PAG to provide the facilities and services that our passengers expect.

THE STRUCTURE OF THE CAPITAL INVESTMENT PROGRAMME

The content of this document is guided by our Commitments framework for consultation on the Capital Investment Programme and is intended to describe the capital investment for London Gatwick over the next five years. It aims to provide details regarding the drivers and priorities for investment, as well as giving specific information on current and future projects.

The structure of this document is as follows:

- Section 1 describes London Gatwick's vision for the development of the airport, our values and our business priorities
- Section 2 describes London Gatwick's key drivers for investment and how these are translated into capital projects to achieve the goals for each driver
- Section 3 provides the programme of capital investment for the next five years, and this programme compared to the 2024 CIP, with reasons for any material differences
- Section 4 provides a short summary
- Appendix provides the extracted Core Service Standards and Airline Service Standards table from London Gatwick's 2025/26 Conditions of Use

This Capital Investment Programme document is a snapshot of our plans at the time of publication and a basis for future consultation and thus does not represent a mandatory investment programme.

ANNUAL CAPITAL INVESTMENT PERFORMANCE REVIEW

This Capital Investment Programme document does not include a review of the performance of the 2024/25 Capital Investment Programme. This information was shared separately at meetings with our airline customers and the PAG following the completion of the 2024/25 regulatory year.

FEEDBACK

This document was distributed to the members of the Airport Consultative Committee (ACC), the Gatwick airlines' consultative body, on 15 September 2025 and to GATCOM's Passenger Advisory Group (PAG) on 18 September 2025 as a draft for consultation with a request for feedback by 24 October 2025. Their feedback has informed the final investment plan. We appreciate the contribution that the airlines and the PAG have made in this consultation process and thank them for helping us shape Gatwick's future capital plans.

SECTION 1: LONDON GATWICK VISION

To be the airport for everyone, whatever your journey

Underpinning our vision is a strengthened focus and increased investment on simplifying the journey through our airport, ensuring an easy and efficient experience.

OUR PRIORITIES

We're focused on strategic priorities that set out our ambition to remain as one of Europe's best airports. Safety and security underpin everything we do.

Great service **Give every passenger an enjoyable and effortless experience**	
Progress in 2024	• Our 43 million passengers received good levels of service as we met 99.3% of our agreed service levels. • Our world-beating security processed more than 95% of passengers through in five minutes or less. • 95% of passengers rated their overall departure experience as good or excellent. • We completed work to refurbish our NT departure lounge. • The CAA awarded our special assistance services the best rating possible ("very good")
What's next?	We will continue our programme to improve the look and feel of the airport, finishing the ST departure lounge and turning our focus to gate rooms, toilets, bus stops and wayfinding right across the campus.

Be sustainable **Continually drive greener and more sustainable solutions**	
Progress in 2024	• Emissions from our vehicle fleet reduced by 90% after switching most vehicles to run off HVO, rather than diesel. • The London Gatwick Hydrogen Hub partnership with Airbus, Air Products and easyJet started exploring the introduction of hydrogen infrastructure including for, potentially, zero emission aircraft. • We provided £570,000 in grants to support 158 community projects that helped to address social issues, promote education, or encourage personal development.
What's next?	We will continue to roll out 300 electric or zero emission vehicles across our fleet and to replace refrigerants and boilers across the campus to achieve net zero (Scope 1 and 2 emissions) by 2030.

Build and grow **Strengthen our airline, retail and commercial offer**	
Progress in 2024	• Passengers benefitted from superb choice as more airlines operated from our airport than ever before. • We secured significant growth in airline services to regions with little to no historic traffic from London Gatwick (China, Africa, India, Middle East). • We opened 20 new retail outlets in our terminals • We added over 3,000 mid-stay parking spaces adjacent to NT, offering passengers speed and convenience
What's next?	We will continue to give our passengers even greater choice by growing our short and long-haul networks. We will expand our catering range, giving passengers more choice.

Work smarter **Drive efficiency and resilience**	
Progress in 2024	• We worked closely with NATS to improve staffing and resilience in our control tower. • We became an A-CDM[1] networked airport. • Our £50 million taxiway rehabilitation programme is strengthening resilience in this crucial asset. • We improved our On Time Performance by 5% year on year. • We delivered additional self-service bag drop capability in South Terminal, offering passengers a fast, efficient service and reducing queues.
What's next?	We will roll out our Smart Stand innovation to all stands on Pier 6. Our programme to rehabilitate our airport's taxiways and strengthen airfield resilience will also continue. In the control tower we will add capacity in our ground movement control position.

Keep our airport moving forward **Invest in projects that serve our customers and enable growth**	
Progress in 2024	• We completed the Examination phase of our Northern Runway Programme with the Planning Inspectorate and responded to the Secretary of State's "minded to approve" letter with improved proposals on noise and road traffic.
What's next?	Subject to planning approval with investable conditions, we will take forward our Northern Runway Project to grow capacity, improve resilience and support economic growth. We'll also continue to build the Pier 6 extension, delivering eight new aircraft stands close to our runways and giving half a million more passengers the opportunity to board and disembark via a jet bridge from summer 2027.

[1] A-CDM - Airport Collaborative Decision Making: a joint decision-making process involving all key airport stakeholder sharing accurate, real-time information to improve the efficiency, predictability, and resilience of airport operations.

SECTION 2: INVESTMENT DRIVERS

Gatwick has 7 key investment drivers:

- Safety, Security and Compliance
- Capacity and Service
- Operational Resilience & Efficiency
- Sustainability
- Asset Stewardship
- Commercial Revenue
- Future Growth

2.1 SAFETY, SECURITY & COMPLIANCE

Ensuring the safety and security of our passengers and staff is our highest priority—and fundamental to the success of our business. To maintain safe operations, we must continue to invest in meeting the standards set by key regulatory bodies. These include but are not limited to:

- The Civil Aviation Authority (CAA) – responsible for granting our licence to operate the airfield
- The Department for Transport – overseeing compliance with national security regulations
- The Environment Agency – ensuring we protect and preserve the surrounding environment

These investments support a range of essential projects, such as:

- final completion of the £65m Security Regulation Project which installed new security screening technology for passengers and their cabin baggage ahead of the Department for Transport (DfT) 31 March 2025 deadline. As well as enhancing security screening capability, the new technology allows liquids and electrical items to be left in bags meaning our passengers have travelled more easily through our airport this summer. Facilities in the Sussex Suite for Signature's VIP passengers were also upgraded. Snagging and some minor modifications will be completed before the end of 2025.

NT Central Search

Sussex Suite

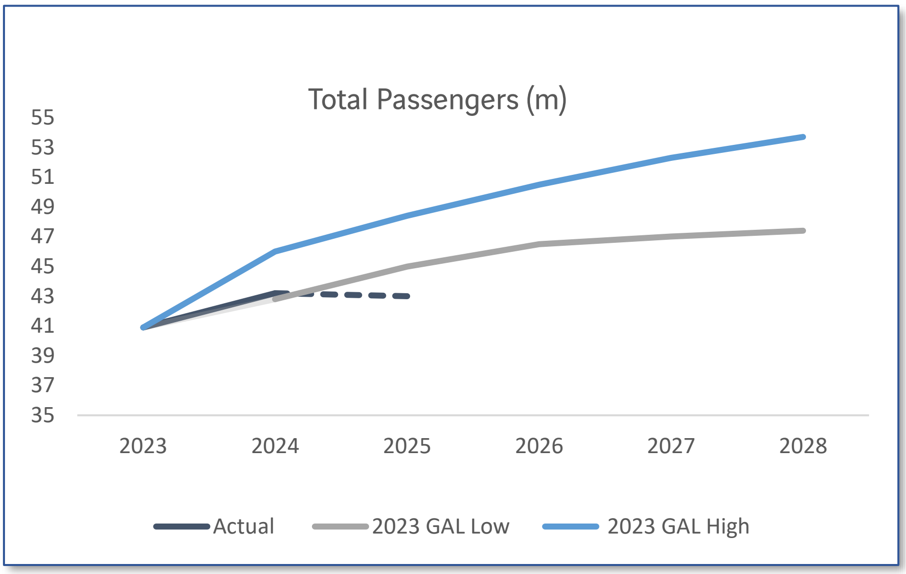
- a £10m project to upgrade lighting and emergency escape routes in the South Terminal baggage hall due for completion in 2025,
- a 5-year programme to replace the North Terminal fire alarm system,
- upgrades to both the northern and southern airfield facilities for the supply of potable water for aircraft, due for completion in 2026. Current facilities do not meet IATA standards.
- removal of asbestos from the IAS plantroom in South Terminal, located above Central Search. This remediation must be done to allow the replacement of water tanks and low-voltage switchgear which deliver water and electricity to most of the South Terminal,
- installation of netting on ponds D and F, which are not currently netted, to reduce the risk of bird strikes.

2.2 CAPACITY AND SERVICE

2.2.1 TRAFFIC

London Gatwick undertakes high-level traffic assessments to help inform the long-term capital investment forecast. In 2023, as the airport started to recover from the Covid 19 pandemic, GAL set out a range of annual traffic numbers as set out in Figure 1 below:

Figure. 1: London Gatwick passenger traffic (million passenger per annum) – actual and forecast



Source: GAL forecast

The above forecast was informed by a wide range of information, including discussions with key airlines operating at London Gatwick. 2024 performance was broadly in line with the 2023 CIP low-case scenario at 43.3 million passengers and macro-economic and geo-political risks continue to create considerable uncertainty. Whilst GAL retains a positive view over the long-term, growth in the near-term is expected to remain below the 2023 CIP low case.

Economic activity continues to influence traffic demand, as the majority of London Gatwick's passengers travel from the UK. Over the past 12 months, inflation has remained between 2.3% and 3.8%, and interest rates have decreased gradually in response albeit at a slower than expected rate. However, these factors have not yet had a significant effect on consumer confidence. Airlines have responded to stronger market demand for summer leisure travel by altering routes from city breaks to destinations such as Egypt and Turkey. This has resulted in longer sector lengths and reduced daily rotations for some short-haul airlines.

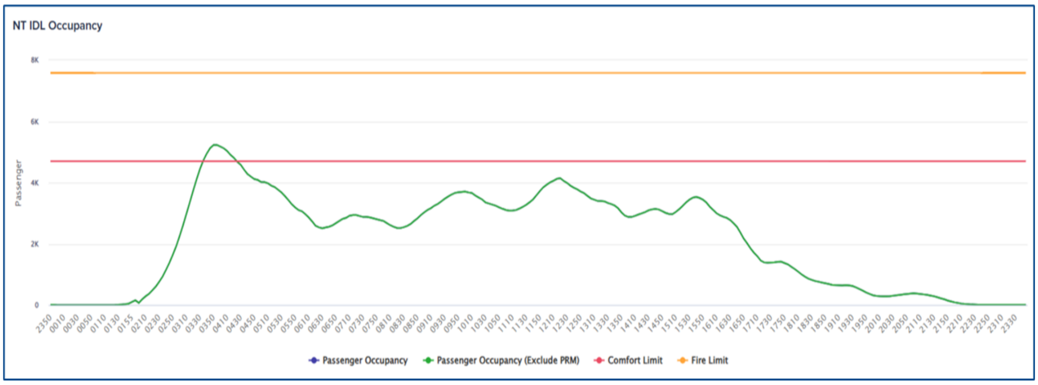
Across the board, load factors have declined slightly and whilst aircraft order books suggest long-term increase in aircraft size, the observed trends in 2025 indicate this will be more gradual. Traffic also continues to be more seasonal than expected. Despite these headwinds, we have continued to broaden our long-haul operations, with ongoing growth in connections to Africa, the Middle East, and Asia by both new and existing airlines. New airlines include Gulf Air, Uganda Airlines, and Mavi Gok Airlines; Wizz Air deployed their first UK A321XLR to Jeddah, and Singapore Airlines now operates daily.

Using London Gatwick traffic forecasts to determine facility requirements

While annual traffic forecasts provide a broad view of overall demand, infrastructure planning must focus on meeting peak demand during the busiest periods of the year. At London Gatwick, this means assessing the busiest hour on the busiest summer day. This peak is determined by analysing aircraft movements on the busiest Friday in August and applying projected load factors based on the average of the six busiest summer Fridays. Given the long lead times required for infrastructure development, it's essential that proposed solutions are robust enough to accommodate a range of peak-day scenarios. To ensure resilience, the busy day schedule—aligned with annual forecasts—has been adjusted across multiple scenarios by varying key assumptions, effectively stress-testing both terminal and airfield capacity requirements.

In addition to overall volume, the assessments also consider the severity and duration of peak periods, recognising that not all pressure points are sustained throughout the day. Some peaks are highly concentrated and short-lived—for instance, Figure 3 shows how the North Terminal International Departure Lounge (IDL) experiences a sharp surge in demand for just one hour early in the morning. Similarly, Immigration e-gate facilities face heightened pressure only during a brief evening window when last wave aircraft return. These nuances are critical in shaping infrastructure strategies, ensuring that resources are aligned not just with total demand, but with the timing and intensity of operational stress.

Figure 3: North Terminal IDL demand assessment - sample day



We have undertaken a high-level evaluation of passenger flows throughout the airport, both arriving and departing. Figure 4 identifies, in red, the infrastructure elements where forecasted demand is expected to exceed current capacity unless further investment is made to expand facilities. The figure also illustrates how changes in traffic composition are reshaping infrastructure needs. For instance, the post-pandemic shift from long-haul flights to the US toward increased services to eastern destinations such as China and India has led to greater pressure on baggage reclaim, driven by higher baggage volumes on these routes. Additionally, Immigration is experiencing strain—not due to a lack of infrastructure, but because eastern long-haul passengers more frequently require manual Border Force checks at standard desks rather than using automated e-gates.

Projects or placeholder capital budgets to address each of the emerging capacity and/or service shortfalls is included in this 2025 pre-NRP Capital Investment Programme and can be found on pages 14-18.

Figure 4: Key Capacity and Service Impact Assessments

Departures		2026	2028	Comments/Solutions covered by the 2025 CIP
Check –in (check-in points)	NT		+8	Solutions could be physical (eg re-instatement of Lower Zone B) and/or greater use of technology/automation
	ST		+11	
Security	NT			
	ST			
Outbound Baggage (MUPS)	NT - TBF		+9	Individually, TBF and MBH are reaching capacity. Dynamic MUP allocation and baggage automation to be explored ahead of physical expansion. Feasibility report commissioned for completion in Q4 2025.
	NT - MBH		+11	
	ST		+5	
IDL (sqm/pax)	NT	+2,750	+3980	Space calculation assumes 4.25sqm/pax, optimising service. NT exceeds capacity for a brief period in the early morning. Expansions: +5,900 in NT Ph 1 in 2030, +4,200m2 in ST Ph 1 in 2031
	ST		+2,800	
Coaching Gates	NT	+1	+1	+1 will be added Q2 2026 in Gate 45. Pier 6 in 2027.
	ST			Likely impact of IDL on Gate 10 in 2028.
Pier Stands (Code C)	NT	+3	+3	+8 delivered by Pier 6 extension in 2027
	ST			
Centrelines (Code C)			+6	+8 will be delivered by Pier 6 extension in 2027

Arrivals		2026	2028	Comments
Immigration (Desks)	NT			Desks under pressure for brief period in the evening in 2028
	ST			
Immigration (E-gates)	NT			E-gates under pressure for brief period in the evening in 2028
	ST			
Reclaim	NT		+1	Pressure for 2 hours during first wave arrivals. Call forward process improvements and dynamic allocation can address near term issues. Additional belt east of domestic belt & move wall offers longer term solution. Feasibility report commissioned, due to report in Q4 2025
	ST		+2	Potentially resolved by lengthening of reclaims 7 and 8, plus call forward process improvements and dynamic allocation. Feasibility report commissioned, due to report in Q4 2025

Key:

>5% capacity at peak	<5% capacity at peak	Over capacity briefly at peak	Over capacity at peak

Notes: Capacity assessment assumes no intervention ie unmitigated demand

2.2.2 SERVICE QUALITY

London Gatwick invests in service quality to attract and retain customers. This approach has underpinned our success in increasing traffic, market share, route network expansion, and higher passenger satisfaction.

In 2023, we developed a new vision to guide the airport's development. Our vision, supported by the strapline **"To be the airport for everyone, whatever your journey"** reflects our diverse airline and passenger customers. It has three core foundations: **ease, efficiency and experience**. Our vision, together with our priorities, set out in Section 1, is at the core of our 2025 investment programme.

Our core service performance is monitored through the Core Service Standards (Rebates) (CSS) scheme, which was introduced in 2014 under our Commitments framework and has been maintained through subsequent renewals of the framework, most recently in May 2025. This scheme provides thresholds for fifty core services that are most important to our customers such as security queues, cleanliness and the availability of escalators and lifts, with service targets below which we believe we should not fall. We report performance against each target every month. Continued performance above each of these thresholds is a key assumption in our capacity assessments. Details of the targets, which are set out in London Gatwick's 2025/26 Conditions of Use, can be found in the Appendix.

While we fully recognise the critical role of services governed by the Core Service Standards (CSS), our commitment extends beyond these benchmarks—we strive to enhance every aspect of the passenger experience.

We actively monitor feedback through a range of channels, including our internal Quality of Service metrics, ACI and CAA Net Promoter Scores (NPS), and social media platforms. This feedback consistently affirms that London Gatwick delivers a positive experience, with passengers particularly praising our efficiency, ease of use, and cleanliness. Core processes such as check-in, bag-drop, security screening, and arrivals are frequently rated highly for their simplicity and effectiveness, reflecting the impact of our ongoing investment in transformative technologies.

However, to shift perceptions from "good" to "great," passengers have identified areas for improvement including enhancing the departure lounge experience, providing clearer information on walking distances and queue times and modernising tired or outdated terminal areas.

Impression of reconfigured Pier 6 orientation zone

In response, the 2024 Capital Investment Programme (CIP) accelerated refurbishment across piers, gate rooms, and toilets, and expanded the scope of both North and South Terminal Departure Lounge upgrades. The 2025 pre-NRP commits an additional £10 million to "look and feel" projects, fast-tracking the refurbishment and reconfiguration of Pier 6 and its link bridge, ensuring substantial completion ahead of the Pier 6 extension opening in 2027.

To improve wayfinding and orientation, new orientation zones have been installed in both International Departure Lounges, offering clearer layout and walking time information. Further enhancements will come with the rollout of updated wayfinding systems in 2026 and 2027, providing passengers with greater confidence and ease of navigation throughout the airport.

We closely monitor airline and third-party operational performance targets, recognising their direct impact on the passenger experience. One of the most critical metrics is On Time Performance (OTP)—a key indicator of success for our airline partners and a major driver of passenger satisfaction. London Gatwick aims for 70% OTP during the summer season and 75% in winter and achieving - and surpassing - these targets remain a top priority.

OTP is influenced by a range of factors, including airline scheduling, ground handler efficiency, and airspace congestion across the UK and Europe. At the heart of this is Air Traffic Control (ATC), which plays a pivotal role in airport performance. Ensuring the availability of skilled personnel, modern technology, and fit-for-purpose infrastructure is a shared focus for both GAL and NATS, our ATC provider.

Although pleased to see a notable improvement in OTP during summer 2025, we continue to prioritise initiatives that support further gains. While capital investment in infrastructure and systems is essential, we also explore people and process solutions, or combinations thereof, to drive performance. In infrastructure, the 2025 pre-NRP CIP encompasses a significant expansion of the Lima taxiway scope, to include a link to Tango taxiway and provision of 15 Code C stands adjacent to the taxiway, as well as modifications to systems and airfield infrastructure to support a second ground movement position in the control tower.

Examples of some of the direct service improvements for airlines and passengers in this CIP include:

Airfield, On Time Performance and Pier Projects

- a £140 million extension to Pier 6 to provide eight new full Code-C pier-served stands, making the boarding experience easier and more efficient for more than one million passengers every year, who would otherwise be coached to a remote stand, and maintaining London Gatwick's 95% pier service threshold well into the future (Fig 4). The 8 new stands, which will come into service in spring 2027, are close to the runway offering short taxi times for arriving and departing aircraft, aiding OTP and reducing fuel burn and associated Scope 3 emissions.

Impression of Pier 6 extension gate areas

The extension will provide large, airy gate spaces with seating for A321 aircraft passenger loads, safeguard for auto-boarding capability, provide additional toilet facilities, and offer 'at-level' boarding and an enhanced arrivals experience for passengers with restricted mobility. The project is being designed with sustainability in mind from the start; how it is sized to meet the key requirements; how it is constructed, challenging the standard concrete and steel approach to reduce carbon; and how it will operate, incorporating air source heat pumps, solar panels and passive engineering to reduce heat loss in winter and heat gain in summer.

- the extension of taxiway Lima to create a new link between taxiways Sierra and Uniform which will improve the resilience of the taxiway system by offering an alternative route for aircraft travelling from the runway and to access maintenance hangars, and an extension of taxiway Tango to the north to link to the new Lima extension will create an additional north/south taxiway route,

- enhanced push & hold capability, increasing the number of 'drive-through' push and hold stands and combining them with the capability to de-ice aircraft prior to departure,
- provision of an Airport Control Centre (APOC) (aka Single Operations Centre) to drive improved situational awareness, stakeholder communication and on-the-day decision making,
- provision of connectivity via a new private 5G network on currently unconnected remote stands to support A-CDM deployment and facilitate efficient ground handler and airline operations,
- pilot roll-out of "smart stand" technology is planned for Pier 6 stands, following trials on two individual stands in both terminals in 2024/25. The purpose of the pilot is to evaluate the impact of this technology on safety, ground handler efficiency, and OTP at a larger scale. The results will be used to inform decisions about a campus-wide implementation.

Terminal Projects

- The refurbishment of our existing International Departure Lounges will finish in 2025 with the completion of South Terminal. Feedback on North Terminal improvements has been very positive, but physical expansion is planned to add new space with more shops and restaurants, additional seating, better accessibility features, and multi-faith spaces. New 'mood zones' will help passengers personalise their experience and make navigation easier, reinforcing London Gatwick's unique identity.
    - For North Terminal, in 2025 the plan shifted to expanding northward from the existing lounge, adding 6,000m^2 over Levels 20 and 30 by 2030. This impacts the arrivals coaching gate, which will be re-provided within Level 00 and Level 10 in the new extension. Temporary facilities will be created near Jubilee House in 2025 to allow construction on the extension to begin in 2026. The existing Departure Lounge will be reconfigured for an holistic passenger experience.
    - South Terminal International Departure Lounge will expand west, adding over 4,000m^2 on Levels 20 and 30 by 2031, with existing space reconfigured, including the orientation of the current escalators, for a more seamless environment. A separate project is underway to reconfigure centrelines on Piers 2 and 3 to offset the loss of two stands during construction of the extension.

- Refurbishing over 25 toilet blocks will meet essential passenger needs and ensure passengers continue to rate our cleaning standards well above our Quality-of-Service threshold of 4.0. Work on a £5 million programme to upgrade Pier 4 and Gate 45 toilets starts in winter 2025 and the programme will run through to 2028.

Improved wayfinding will make airport navigation easier by providing clear, timely information. While Quality of Service customer satisfaction scores are already above 4.0, the project will add walking distances and times to enhance the experience. Simplifying and updating signage will also create a more modern, coherent look throughout the airport. On Pier 6, gates will all be re-numbered in spring 2026, ahead of the extension which will add 8 more pier served stands in spring 2027.

Pier 2 and Pier 3 rotunda

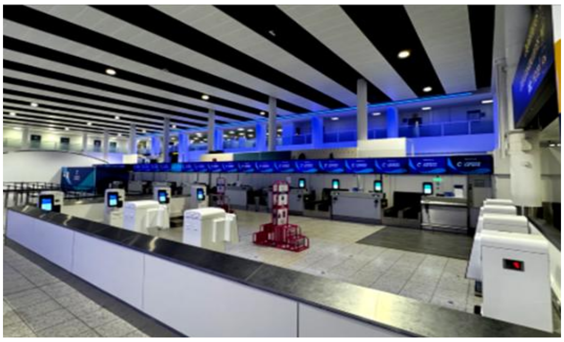
- Upgrades to the forecourt and drop off areas will improve the first and last impression that passengers receive as they arrive at and depart from the airport. This includes wayfinding, lighting, seating and paintwork.

- Investment in transforming boarding processes will be complemented by the acceleration of a programme of refurbishment of piers and gate-rooms. The programme will support streamlined boarding processes for ground handing teams including optimised positioning for desks, information screens and tannoy systems as well as rationalisation and, potentially, automation of cabin baggage gauges if current trials prove successful. Passenger experience will focus on addressing wayfinding, seating, charging points and welfare provision. In the longer term, more significant investment in some of the older pier infrastructure, such as Pier 3, is envisaged.

- The replacement of life expired e-gate technology in security will create the platform for more flexible passenger access to security.

- Plans to improve the experience in the baggage reclaim halls whilst passengers wait for their baggage to be delivered to them include clearer information on their allocated baggage belt, as well as more seating/rest points, particularly for assisted travel passengers. An effective call forward process will drive greater efficiency and help address capacity pressure in both terminals (Fig 4). Larger reclaim belts in ST and a new belt in NT are also planned.

- Continuation of investment in the next generation of automated check-in and bag drop processes will maintain London Gatwick's strong track record in eliminating queues and improving passenger experience at this key stage of the passenger journey. London Gatwick remains committed to ensuring passengers should queue for less than 10 minutes at check-in and installation of new generation bag drops in South Terminal in 2024 and 2025 shows us the way in transforming the process, both for airlines operating traditional check-in processing on standard desks and those who have earlier generation self-serve products. We ae exploring automation of the AAA[2] process which unlocks the opportunity for common use infrastructure, and 2-stage processing shows just how efficient baggage input can be. Technology is also enhancing the ability for passengers to prepare themselves before they even reach the airport, with some airlines allowing passengers to check-in, do ID checks, upload visas and even pay for extra bags on their smart phones, via the airline app. Working with our airline customers, biometrics are expected to play a key role in streamlining and linking key steps of the journey from booking through to boarding, making the passenger journey effortless, creating cost savings for our airline and ground handling communities and space savings for the airport to address forecast potential capacity shortfalls (Fig 4).



South Terminal Zone B bag drop

- Supporting our vision to be the airport for everyone, in June the [CAA awarded] our special assistance services the best rating possible ('very good'). A range of initiatives to further support passengers requiring assistance are planned, such as improvements to accessible toilets, a refresh of the 'call points' located around the terminal, and where possible, additional lifts on piers to improve the efficiency of the Assisted Travel service provider.

- An additional lift from South Terminal Lower Zone B will improve access to the terminal for arriving domestic passengers and make the existing check-in facilities in the zone more accessible. Access is currently via a single, small, very old, hydraulic lift which is difficult to replace and upgrade as it is a single point of failure.

Other Service Improvements

- Installation of traffic lights on both terminal roundabouts, along with modifications to roundabout entry and exit points, will improve the flow of vehicles to and from the forecourts and car parks and prevent congestion at peak times. This project has been deferred by a year into 2027/28 in the 2025 CIP to reflect lower traffic volumes, both in airport users but also local road usage.

[2] AAA - "Accounted, Accompanied, and Accepted" - part of the baggage reconciliation process which ensures that every piece of checked baggage is accounted for, each bag is accompanied by a passenger who is boarding the flight and the baggage is accepted by the airline for transport.

- Improved digital signage directing passengers to long stay car parking zones and the replacement of the car park spaces monitoring system in the multi-storey car parks will aid passengers, their families and friends, and other airport visitors to find a parking space more easily.

2.2.3 SUMMARY OF CAPACITY AND SERVICE INVESTMENT

Over the next five years, London Gatwick is set to invest more than £600 million in capacity and service improvements, making this the largest area of investment and accounting for 33% of the airport's total planned capital expenditure. A significant portion of this spend - 19% - is dedicated to expanding the North South Terminal departure lounges, reflecting our commitment to enhancing passenger experience during peak travel times.

Projects to extend Pier 6, upgrade and automate check-in, enhance baggage reclaim capability all aim to make key processes easy and efficient. Out on the airfield, investment in a range of projects to drive OTP will ensure our passengers leave on time. Projects to improve the look and feel of some of the tired and dated areas of our terminals, upgrade facilities for assisted travel users and renew our wayfinding will help Gatwick sustain high service standards, and deliver a seamless, modern experience for all our passengers, whatever their journey.

South Terminal Departure Lounge – orientation zone

2.3 OPERATIONAL RESILIENCE & EFFICIENCY

2.3.1 OPERATIONAL RESILIENCE

The resilience of our airport is vital to us, our airline customers and our passengers. That is why we invest in a wide variety of measures to enhance our airport's ability to recover from disruption, such as weather and en-route air traffic congestion, like that seen across much of Europe in recent summers. On the airfield, the new rapid exit taxiway continues to provide an additional fast exit route off the runway for arriving aircraft and in 2025 London Gatwick became an A-CDM networked airport. We also became the first single-runway airport in the world to implement Advanced Mixed Mode (AMM), a dynamic aircraft separation system that replaces traditional fixed-distance gaps between planes with time-based intervals, adjusted in real time based on live wind conditions and aircraft performance. This is especially valuable at London Gatwick, where both arrivals and departures share a single runway. Measures such as these aim to reduce runway occupancy times, improve the resilience of runway operations and aid on-time performance.

Our CIP continues to invest in an extensive IT programme to improve the resilience of our critical IT systems and guard against the increasing risk of cyber-attack. We recognise that aviation is a high-profile target and will remain vigilant to threats and be agile in our response.

Other projects in this 2025 pre-NRP CIP that both directly and indirectly support resilience include:

- the extension of taxiway Lima to create a new link between taxiways Sierra and Uniform taxiways and the extension of taxiway Tango to the north to link to the new Lima extension, to create an additional north/south taxiway route which will improve the resilience of the taxiway system by offering alternative routes for aircraft travelling to and from the runway and to access maintenance hangars,
- enhanced push and hold capability, increasing the number of 'drive-through' push and hold stands and combining them with the capability to de-ice aircraft prior to departure,
- additional centrelines, beyond those provided by the Pier 6 extension project, to offset the impacts of maintenance and project work,

- a pilot deployment of 'smart stand' technology on Pier 6 stands, following successful trials in 2024. Further roll-out will follow when and if evaluation of the pilot demonstrates the operational benefits of the technology at scale,
- provision of connectivity via a private 5G network on currently unconnected remote stands to support A-CDM deployment and facilitate efficient ground handler and airline operations,
- creation of an Airport Control Centre (APOC) (aka Single Operations Centre) to drive improved situational awareness, stakeholder communication and on-the-day decision making,
- continuing to ensure the stability of power supplies to the airport and the provision of ample power to meet the airport's growing electrical energy demands, particularly as we anticipate higher demand for electrical vehicle charging, the replacement of gas heating with electric and the deployment of pre-conditioned air to aircraft,
- and investment in foul sewage resilience – ensuring sewage facilities are aligned to the airport's future needs, including those dealing with aircraft toilet waste.

2.3.2 EFFICIENCY

We invest in projects targeted at improving operational processes and reducing costs both for our airline and ground handling communities and for the airport. We look at where efficiencies can be made through developing innovative processes, which may necessitate capital investment to realise them. There are strong links between resilience and operational efficiency and projects such as the creation of an Airport Control Centre (APOC), deployment of smart stands and greater connectivity on remote stands are examples that meet both goals. Other initiatives targeting efficiency include:

- continued automation of check-in and self-service bag drop capability which has seen a reduction in queue times for passengers and the release of staff to better support those passengers who most need help. Trials of the next generation of this technology, and automation of other parts of the check-in process such as AAA checks, will potentially lead to further efficiencies reducing the time and space required for passengers to move through this key stage of their airport journey,
- automation of boarding process, trials of which in 2019 demonstrated the potential to improve the boarding process for passengers, to reduce pressure on ground handlers and increase the efficiency of an aircraft turnaround,

- provision of next generation SEGS (stand Entry Guidance System) which could give pilots more information to optimise aircraft taxi times, saving time, fuel and emissions,
- automation of baggage handling which offers the potential for reduced manual handling, increased capacity and resource efficiency benefits,
- exploration of opportunities to increase throughput at NT Level 10 staff search where compliance with Department for Transport requirements since March 2025 has reduced productivity.

2.3.3 SUMMARY OF OPERATIONAL RESILIEINCE & EFFICIENCY INVESTMENT

Investment in operational resilience has increased in the 2025 CIP to over £300 million or 17% of the total. The largest project, investing 14% of the total CIP, is Lima taxiway, the scope of which includes Tango taxiway links and 15 Code C stands. Alongside, this significant infrastructure project, initiatives like smart stand technology, an airport operations centre, improved remote stand connectivity, and better Ground Movement Controller capability aim to boost efficiency, resilience, and OTP.

2.4 SUSTAINABILITY

We aim to lead the way in sustainable aviation. In 2021, we launched an update to our Sustainability Policy, called our Second Decade of Change. This looks ahead to 2030 and sets out a renewed set of goals covering ten topics. Recognising the urgent need to make net zero a reality, we have accelerated our commitment to be a net zero airport (Scope 1 and 2) by 2030, ten years ahead of our previous target. Each year we report on our progress – our 2024 Decade of Change Performance Summary can be found here.

Our goals, shown below, are shared across three themes: People and Communities, Net Zero and Local Environment.

People and Communities

1. Local economy:
Be a partner and advocate for a thriving resilient economy and contribute to local and regional workforce skills partnerships and initiatives.

2. Opportunity and Accessibility:
Increase workforce diversity through recruitment, training and retention practices and partnerships; and ensure accessibility and opportunity for disabled colleagues and passengers.

3. Workplace safety:
Be a leading airport for the safety, health and wellbeing of our workforce and passengers, striving to learn and continually improve.

4. Local communities:
Invest resources in programmes and partnerships for those communities most affected by Gatwick's operations.

5. Noise:
Limit and where possible reduce the airport's impact on local communities by working with partners and stakeholders to create the most noise efficient operation possible.

8 DECENT WORK AND ECONOMIC GROWTH · 10 REDUCED INEQUALITIES · 11 SUSTAINABLE CITIES AND COMMUNITIES

Net zero

Continue Gatwick's net zero transition and further improve local air quality by:

6. Airport emissions:

- Achieve Net Zero for GAL Scope 1 and 2 GHG emissions by 2030.
- Sourcing 50% of airport network electricity and 50% of heat network from UK renewable sources via onsite generation and direct purchase agreements (PPAs) by 2030;
- Requiring all GAL and airport duty vehicles, ground support equipment and mobile construction equipment to meet zero or ultra-low emission standards by 2030;

7. Aircraft and surface access emissions:

- Playing our part in UK aviation and ground transport transition to net zero carbon.
- Working with airlines and fuel providers to implement the Sustainable Aviation decarbonisation roadmap and interim goals.
- Working with transport partners to increase airport passenger and staff usage of public transport and zero and ultra-low emission journey modes to 60% by 2030.

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE · 11 SUSTAINABLE CITIES AND COMMUNITIES · 13 CLIMATE ACTION

Local Environment

8. Water:
Reduce the airport's potable water consumption by 50% on a per passenger basis by 2030 compared to 2019, continue to improve the quality of water leaving the airport and work with partners to promote local water stewardship.

9. Waste:
Ensure that by 2030 all materials used at Gatwick in operations, commercial activity and construction, are repurposed for beneficial use i.e. repaired, reused, donated, recycled, composted or converted to fuel for heating or transport.

10. Biodiversity:
Have a sector-leading 'net gain' approach to protecting and enhancing biodiversity and habitats on the airport estate, including zero use of herbicides by 2030; and support biodiversity partnerships in our region.

11 SUSTAINABLE CITIES AND COMMUNITIES · 13 CLIMATE ACTION

2.4.1 PEOPLE AND COMMUNITIES

Our People and Communities theme includes work relating to five goals: Local Economy, Opportunity and Accessibility, Workplace safety, Local communities and Noise.

Local Economy

Our airport plays a vital role in sustaining the local and regional economy. From generating employment and supporting the supply chain to providing connectivity for tourists and opportunities for inward investment and trade we have an important economic relationship with the region we serve. In 2023, we supported over 76,000 jobs across the region, with 22,000 people working directly on the airport campus and added over £5.5 billion of gross value. Our goal is to improve the proportion of our annual expenditure up to 15% in the local area and 25% in the region. We also aspire to create more high skilled job opportunities for local people as the airport grows and develops both its service and technology proposition.

The Airport Economic Zone (AEZ) initiative launched in November, aims to unlock new economic growth. The new AEZ brings together a taskforce of senior economic development, business leaders from across the region, and representatives from UK Government, to promote long-term sustainable economic growth and encourage new inward investment.

Local communities

In 2023, we invested in a new STEM (science, technology, engineering, and maths) centre, providing a dedicated, hands-on space to engage and educate school children from the region. Since launching the second Decade of Change sustainability strategy in 2021, London Gatwick has reached more than 540,000 students through internships, in-school sessions, virtual careers live broadcasts, and visits to our on-site STEM Centre, which celebrated its 5,000th visitor in June.

The airport is committed to reaching one million student engagements by 2030, helping to inspire and equip the next generation with the skills and confidence to pursue careers in aviation and beyond. With more than 540,00 student encounters we are already over halfway to achieving this target.

Opportunity and Accessibility

Gatwick's goal is to be the most accessible airport, and considering the needs of both disabled colleagues and passengers in all our investment plans is a key priority. Our special assistance service was rated 'very good' by the CAA in June 2025, with our airport recognised for providing great service despite our large-scale operation and high passenger volumes.

We work closely with GATCOM's Passenger Advisory Group and the Independent Gatwick Accessibility Panel (IGAP), incorporating their feedback and user data to improve accessibility. Recent investment in South Terminal's departure lounge includes a larger Assisted Travel waiting area and greater privacy. Future projects to expand lounges in both terminals will enhance facilities for passengers needing assistance, such as adult changing spaces and quiet zones, ensuring accessibility is central to new designs.

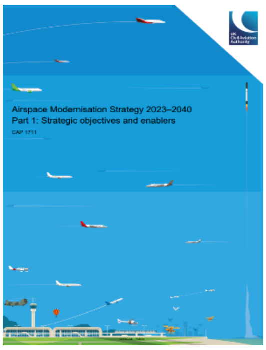
Upgrades to North Terminal's Gate 45 will provide better waiting and toilet facilities for those requiring specialist help. Alongside new developments, we continue to improve older infrastructure, such as strengthening the Pier 6 arrivals route for buggy operations.

Workplace Safety

Safety and security underpin everything we do at London Gatwick and ensuring people are safe in their workplace is fundamental. The 2025 CIP includes projects to roll out more of the Powerstow belts on reclaim off-load points following a successful pilot in South Terminal in 2024. These units reduce the manual handling of bag in the inbound baggage process. Work to improve emergency lighting and exit routes in the South Terminal baggage hall will be completed in 2025 and a project to remove asbestos from a large plantroom in South Terminal is currently being planned so engineers and contractors may safely work on switchgear, HVAC equipment and water tanks in the area.

Noise

We remain dedicated to minimizing the airport's impact on surrounding communities by collaborating with partners and stakeholders to achieve optimal noise efficiency. Our ongoing engagement with key groups—including the Noise Management Board, the Noise and Track Monitoring Advisory Group, the annual Airspace and Noise Public Meeting, airline engagement sessions, and Sustainable Aviation—demonstrates our commitment to transparent and effective noise management.



Our involvement in the Future Airspace Strategy Implementation – South programme (FASI-South) reflects our continued support for the modernization of the Gatwick airspace network. This initiative aims to facilitate "quicker, quieter, and cleaner journeys" while further enhancing aviation safety, operational capacity, efficiency, resilience, and environmental performance across Gatwick's arrival and departure routes. The investment timeline for this programme has been extended to 2028, aligning with ongoing consultation regarding Sustainable Aviation's proposal to establish a Single Design Entity (SDE) responsible for FASI delivery, which has impacted the previously anticipated implementation schedule.

2.4.2 NET ZERO

Scope 1 and 2 Emissions

London Gatwick has achieved Level 4+ 'Transition' status in the Airport Carbon Accreditation (ACA) programme - the highest level currently awarded by the scheme. This milestone reflects Gatwick's deep commitment to climate action and its leadership in sustainable airport operations.

London Gatwick set an ambitious goal reach net zero for our Scope 1 and 2 emissions by 2030 backed by a commitment to invest £250 million to achieve it. Our 2025 pre-NRP CIP includes:

- a major programme to decarbonise heat, replacing over 100 gas boilers, in almost 50 buildings, with zero emission alternatives,
- a programme to reduce fugitive refrigerant gas emissions from chillers,
- a programme to rationalise and replace the 300-strong GAL vehicle fleet with zero emission alternatives

We have partnered with Vital Energi to deliver the 5-year decarbonisation of heat programme and design work is well underway. The first project, to replace the boilers in the North Terminal CIP building, is expected to start on site in January 2026 and complete the following year. Jubilee House, Pier 3 and Gate 45 boiler replacements will start a few months later and others follow shortly. In the meantime, we are actively seeking opportunities to reduce our gas usage and in the first half of 2025, we achieved an almost 10% reduction in Scope 1 emissions from natural gas usage across our airport by operating at lower heating temperatures and turning off heating earlier—by the end of April rather than later in May.

We received an initial delivery of 47 electric vehicles (EVs) and three electric road sweepers in 2025 and ordered 14 electric articulated buses to replace the current landside car park fleet which we expect to arrive in 2026. The next tranche of 19 cars is on order with more to follow each year. We are prioritising the replacement of vehicles which have reached the end of their life and would be naturally replaced under our asset replacement programme. The CIP also includes £25 million for projects to add EV charging infrastructure to support both the GAL EV fleet and 3rd parties.

Whilst we already buy 100% green electricity one of our goals is to source 50% of our electricity from on or near site renewable sources (or via a PPA) and provision for this is included in this CIP in later years. We continue to work with UKPNS, our High Voltage (HV) electricity supplier, on how this can be accommodated on our network and with potential local suppliers of solar power.

Aircraft and Surface Access Emissions

As well as addressing our own sustainability objectives, our investment plans support our airline and other third-party partners to meet their goals to reduce aircraft and surface access emissions. We are active participants in the Zero Emissions Flight Infrastructure Group under the Government's Jet Zero Taskforce and continue to engage with Sustainable Aviation regarding progress updates on the industry's net zero roadmap. We also contribute to industry consultations that support scaling up the United Kingdom's Sustainable Aviation Fuel (SAF) sector and greenhouse gas removal initiatives. Closer to home, we are collaborating with easyJet to trial the use of pre-conditioned air on aircraft while on stand, aiming to reduce jet fuel consumption during the LTO cycle. Data collected from this trial will inform the business case for broader investments across the campus.

Our Hydrogen Hub initiative, in partnership with Airbus, Air Products, and easyJet, is evaluating how hydrogen supply infrastructure could be implemented at our airport. This assessment includes examining interactions with existing development projects and understanding the spatial, energy, and water requirements necessary to facilitate potential hydrogen-powered flights. Whilst this work currently requires no capital expenditure, we expect the impact of alternative fuels to require significant investment in the coming decades, and we want to be as informed as possible as plan longer term infrastructure developments.

The CIP includes £25 million for provision of charging facilities for electric vehicles and a further £5 million for fuelling capability for hydrogen vehicles. We are actively working towards common user equipment across the airfield, in part to support the transition to net zero for airport operations. Projects such as the campus-wide replacement of the Stand Entry Guidance System, which is primarily an asset replacement programme, offers the opportunity to provide smarter technology which can help flight crews with information to aid single engine taxiing.

More strategically, we are investing almost £6 million in the Future Airspace Strategy Implementation – South programme (FASI-South) (outlined above) which not only helps reduce our noise footprint but is one of the most powerful levers for reducing aviation emissions. By updating navigation system and streamlining air traffic procedures to allow aircraft to fly more direct, efficient routes we reduce fuel burn and carbon emissions, enable Continuous Climb and Descent Operations (CCO/CDO) which use less engine power and reduce airborne holding.

London Gatwick's Surface Access Strategy (2022–2030) lays out a clear roadmap for making travel to and from the airport more sustainable, efficient, and inclusive and is a key part of our Deade of Change commitments. The 2025 CIP includes projects to improve infrastructure for walking and cycling, doubling the space and improving the security of bicycle storage, as well as a project to add traffic lights to the North and South terminal roundabouts to improve traffic flows for airport and local road users.

2.4.3 LOCAL ENVIRONMENT

Water

London Gatwick is committed to reducing the consumption of wholesome, or potable, water (targeting a 50% reduction from 2019 levels by 2030) and continuing to improve the quality of any water leaving the airport. Projects envisaged in the 2025 pre-NRP plan include:

- creation of a wetland water treatment facility; six reed-beds with Forced Bed Aeration (FBA) technology to treat de-icer contaminated water, near the storage lagoons to the south of the airport.
- creation of clean water storage capacity within the existing lagoon
- re-purposing of existing pipelines plus additional pipework to distribute treated water around the campus.

Waste

Our goal is to ensure that by 2030 all materials used at London Gatwick in operations, commercial activity and construction are repurposed for beneficial use, ie repaired, reused, donated, recycled, composted or converted to fuel for heating or transport. In 2024, we achieved an average recycling/reuse rate of 62%, with zero untreated waste sent to landfill for the ninth consecutive year. This includes 15 tonnes of coffee cups sorted and sent for recycling and over four tonnes donated to local charities including over three tonnes of hygiene products donated to The Hygiene Bank. In 2024 we invested in the expansion of the sortation capability at the Central Area Recycling centre (CARE) to enable more Category 1 waste, the highest-risk classification of International Catering waste (ICW), to be recycled. The Lima taxiway project (see page 19) will require the relocation and reprovision of the CARE facilities, offering the opportunity to implement more modern, energy-efficient solutions that align with our long-term sustainability and performance goals.

Passenger research continues to demonstrate passengers' interest in supporting sustainable waste initiatives and this underpinned a trial to improve segregation of materials at source through a trial of new recycling stations in the North Terminal. The 2025 investment plan includes funds to replicate the success of the re-cycling stations across the campus with units that are more in-keeping with London Gatwick's look and feel aspirations.

Biodiversity

London Gatwick is committed to advancing biodiversity within the airport environment through a 'net gain' strategy focused on protecting and enhancing local habitats. Initiatives include the expansion of its award-winning wildflower planting scheme along airport roadways and the implementation of a nature-based reed-bed treatment system for onsite water decontamination.

In 2024, the airport received recognition from the Wildlife Trust for a decade of exemplary stewardship of 75 hectares encompassing woodlands, grasslands, and wetlands. All biodiversity initiatives align with the Trusts' Biodiversity Benchmark standard, ensuring external verification and acknowledgment of these efforts.

Looking ahead to 2025, London Gatwick will invest in an additional 20 hectares adjacent to the airport boundary, further extending the protected and managed area.

2.4.4 SUSTAINABILITY INVESTMENT OVERVIEW

Sustainability investment in the 2025 pre-NRP CIP has increased by £58 million to £320 million, compared to £261 million for the equivalent 5-year period in the 2024 CIP. The rise has been driven by changes in the investment profile of decarbonisation of heat and water projects, although the anticipated final costs of both have remained broadly stable. Investment in water storage under Car park Y has been removed from the 2025 plan following determination that it is not required to meet GAL's decade of change targets, but only for NRP mitigation and placeholder budgets for taxiing initiatives and transition to alternative aircraft fuels have been removed from the plan, absent any concrete near-term proposals. GAL remain committed to both initiatives and will reinstate budgets in future CIPs if suitable capital requirements arise.

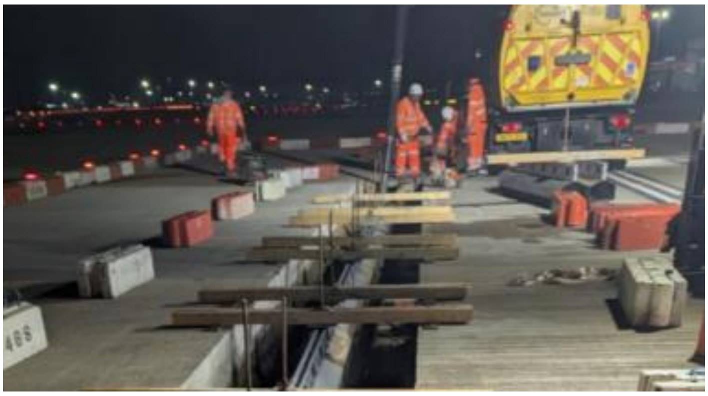
As well as investing in projects to directly deliver London Gatwick's sustainability and those of our airport community, we are embedding sustainability throughout the project lifecycle of all our investments. Our approach is rooted in reducing carbon emissions, enhancing resource efficiency, and aligning with global best practices. We aim to achieve PAS 2080, the international standard for carbon management in infrastructure, accreditation in 2025, which means setting carbon budgets for each project, embedding low-carbon design principles from the outset, quantifying and reducing embodied carbon in materials and processes, engaging the supply chain to deliver carbon-conscious solutions and monitoring and reporting carbon performance throughout the project lifecycle

2.5 ASSET STEWARDSHIP

Maintaining our extensive asset base is essential for ensuring consistently high operational performance and service quality for both passengers and airline partners, as well as for upholding our Core Service Standards. Our comprehensive programme of routine asset renewal encompasses lifts, escalators, passenger boarding bridges, roofs, plumbing, and the IT hardware and software that underpin core operational systems.

Asset stewardship investment can also play a crucial role in support of other investment drivers. For example, gas boilers and vehicles at the end of their economic lives will be replaced by zero emission alternatives, contributing to our net zero goal. Obsolete Stand Entry Guidance Systems (SEGS) may be replaced with "smarter" units that can give more information to aid single engine taxiing and Scope 3 emission reductions. Replacement of our older jet bridge portfolio with new models supports our service driver by improving the look and feel of the gate room and offering a more positive last impression of Gatwick as passengers board their aircraft.

Major asset stewardship projects in this 2025 pre-NRP CIP include:



- resurfacing of the main runway was resurfaced in 2022 with a 7-year design life. The next resurface has been accelerated from the 2024 CIP forecast to ensure it is in optimum condition through Northern runway works,
- completion of the final packages of a £57 million, multi-year programme to rehabilitate large sections of the airfield taxiway system by 2028,
- a portfolio of projects to replace ATC/air navigation assets, including Semi Automated Observation System (SAMOS), which collates and presents real time weather data to ATCOs and our Surface Movement Radar (SMR) equipment.
- a £10 million replacement of the Instrument Landing System (ILS) in 2026,
- structural work to replace the bearings of the Pier 3 link bridge in 2026 and 2027
- a 5-yearprogramme to replace 55 winter fleet (snow clearance) vehicles
- a £26 million, 5-year programme, to replace 27 passenger boarding bridges
- provision of back-up control tower capability, with an operational flow rate capability equivalent to our low visibility protocol, to replace the obsolete "old control tower".
- expansion and upgrade or full replacement of the Police Station,
- replacement of the outbound baggage system sorters in one of the North Terminal baggage facilities, known as TBF,
- replacement of the North Terminal fire alarm system,
- an upgrade to the Destinations Place office block, which includes renewing the drainage system, improving accessibility and refreshing the office accommodation,
- replacement of the ceiling in South Terminal Zone H and removal of defunct ticket desks and storage spaces. Longer term, the replacement of the ceilings above ST check-in Zones D& E and the arrivals concourse will be considered.
- upgrades to the circulation areas (lifts, stairs, pay facilities etc) in multi-storey car parks 1-6,

- an extensive programme for the upgrade of over 25 sets of toilets, in line with those recently opened in ST Immigrations and Gate 55,
- a longer-term project to provide full ATC tower contingency capacity operations, with, potentially, a 'virtual' facility like those operated by both Heathrow and London City airports,
- a longer-term project to replace the inter-terminal shuttle, which is coming up to 20 years old,
- longer term projects to reconfigure and transform our older piers, such as Pier 3 and Pier 4.

Alongside these major investments, the CIP includes a substantial Core Asset Stewardship programme. This covers all our day-to-day renewal projects, many of which directly support the maintenance of our Core Service Standards, for example; the replacement of mechanical assets such as escalators and lifts; the renewal of IT assets, both hardware and software, that support core operational systems like flight information display systems (FIDS); the upgrade of our security e-gates and domestic reconciliation cameras; replacement of HVAC equipment, a campus-wide renewal of Fixed Electric Ground Power (FEGP) and Stand Entry Guidance System (SEGS) units, replacement of the airfield lighting control system; and the upgrade of the SCADA system (Supervisory Control and Data Acquisition) that controls our high voltage electrical network as well as smaller programmes such as the roll out of new re-cycling/waste bins across the campus following successful deployment in the North Terminal departure lounge.

The Core Asset Stewardship programme covers the replacement of end-of-life heating, ventilation and air conditioning (HVAC) equipment, such as the Border Inspection Post chiller and NT CIP Building boiler. As these assets are replaced, we ensure alignment with our net zero goals. The decarbonisation of heat initiative has accelerated around £60 million in asset investments, as air source heat pumps often require downstream HVAC upgrades. Many assets originally scheduled for replacement in 5–15 years will now need earlier updates. Sustainability impacts will be assessed for each project, and to maintain transparency, a new reporting line distinguishes this work from standard asset replacement, helping avoid overstating sustainability investment when replacing expired assets.

Historically, London Gatwick has invested around £36 million each year in Core Asset Stewardship. In 2025/26 we expect to invest around £38 million in more than 55 individual projects, ranging from the replacement of the ST security e-gates and passenger validation system at a total cost of £5 million, down to the refit of the toilets in the air traffic control tower at £78k.

2.5.1 ASSET REPLACEMENT INVESTMENT OVERVIEW

£529 million, or 28% of the 2025 pre-NRP CIP budget, is allocated for investment. Although the proportion has decreased from previous capital plans, it is higher than in 2024 due to accelerated main runway resurfacing, replacing heating and ventilation assets affected by heat decarbonisation, and new projects like the Pier 3 bearing replacement.

The dependability of our comprehensive asset base supports the consistent delivery of our core service standards, ensuring that both our passengers and airline partners enjoy smooth and efficient travel experiences. We carefully evaluate failure rates, maintenance costs, and employ condition-based monitoring to ensure optimum life for our equipment. Rather than like-for-like replacement, we strive to enhance our infrastructure by integrating advanced technologies and more sustainable solutions where it provides tangible business benefit and offers value for money to do so.

2.6 COMMERCIAL REVENUE

Maximisation of revenue through commercially returning projects benefits passengers through the provision of a wide choice of quality restaurants, shops, car parking, car rental, and other services which enhance their experience at London Gatwick, while also enabling us to maintain competitive airport charges and thereby incentivise further growth in airline services and destinations.

Examples of commercial projects in this 2025 pre-NRP CIP include:

Retail

- continued updating and re-vitalising of the variety of shops and restaurants throughout the airport. Examples include the introduction of Gail's bakery and the jeweller, Pandora, into the South Terminal Departure Lounge, a gelato and chocolate unit in the North Terminal as well as new units near Domestic arrivals and on Pier 1.
- Continued upgrading of digital media screens to the latest technology across the airport campus. Examples include the replacement of the large digital screens on either side of the escalators in the ST departure lounge.

Property

- provision of additional on-airport hotel beds to meet continued strong demand. Potential sites include an hotel adjacent to South Terminal multi-storey car park 3 and a further hotel opposite multi-storey car park 1. Both options provide easy access to and from the railway station and the terminals and are ideal for passengers travelling by rail, particularly those with early starts or late arrivals,
- continued investment in upgrading and refurbishing office and support accommodation for a wide range of third-party operators at the airport, such as the upgrade of Pier 5 ground floor accommodation currently underway. This programme is closely aligned with both our asset replacement strategy and our sustainability strategy to improve the energy efficiency of our buildings, right across the campus,

Other

- investment in commercial IT services such as network provision for third party operators.

Car Parking

We aim to develop a parking strategy that aligns passenger numbers, mode share, and parking capacity (on and off-airport) to meet demand and achieve our mode share targets. We will regularly review and update parking options, leveraging technology for better efficiency and service.

To comply with Crawley Borough Council's local plan policy (GAT 3), all new parking will be on-airport. As a responsible neighbour, we support efforts to minimise community impact by maintaining appropriate on-airport parking levels.

Examples of car parking projects in this investment programme include:

- resumption of the pilot of valet parking using robots which paused during the pandemic. The pilot will test the potential for 2,000 existing long-stay spaces to be accessed via a valet drop-off. Passengers will then be able to walk the short distance to the terminal instead of getting a bus.
- potential consolidation of back of house car rental facilities, currently located adjacent to South Terminal forecourt. Options to co-located front-of-house facilities will also be considered.

2.7 GROWTH (NRP DEVELOPMENT CONSENT ORDER)

The Northern Runway project is a major expansion opportunity that will shape the future of London Gatwick's capacity and resilience, deliver much needed additional capacity into the London system and generate over £1 billion of economic benefit to the South East region. It is the most ambitious project in London Gatwick's recent history.

In July 2023 we finalised our plans to bring the existing Northern Runway into routine use and submitted our Development Consent Order ("DCO") application to the Planning Inspectorate. A period of detailed and rigorous examination of the proposals by a panel of independent experts started in February 2024 and concluded at the end of August 2024.

In February 2025 the Secretary of State for Transport announced that she was minded to grant consent for the project but requested feedback on additional conditions recommended by the Planning Inspectorate. GAL responded positively to the Secretary of State in April, as requested, accepting stricter limits on aircraft noise and putting forward an improved noise insulation scheme for local residents. We also accepted a requirement to have 54% of passengers using public transport prior to bringing the Northern Runway into operation, but reiterated the need for third parties, including the Department for Transport, to support delivery of the necessary conditions and improvements required to meet this target. Given the reliance on other parties to achieve this 54% target, should it not be achieved we have also proposed an alternative cars-on-the-road limit be met before first use of the Northern Runway to address potential road congestion concerns. Furthermore, if neither 54% public transport mode share nor the cars-on-the-road limits are met then the operational use of the Northern Runway would be delayed until highways improvements are completed. This would ensure that any additional road traffic flows can be accommodated, and any congestion avoided. We also responded to the Secretary of State on several other matters including measures to strengthen sustainable design and reduce emissions. Stakeholders were invited to comment on the revised proposals by 9 June 2025

The Secretary of State announced the Government's approval of the scheme on 21 September 2025, seven months later than was expected in the 2024 CIP.

The project is a £2.2 billion, privately funded, investment and it is essential that any planning conditions enable us to realise the full benefits of the project and do not impose unnecessary constraints that make it uneconomic to do so. Bringing the existing Northern Runway, built in the 1960s, into routine use for departures will add significant capacity and resilience to the constrained London airports system and allow London Gatwick to serve as many as 75 million passengers a year by 2038. Growth is at the heart of the Government's agenda and our Project is consistent with Government policy to make best use of existing runway infrastructure, set out in the Department for Transport's May 2022 Flightpath to the Future. The additional capacity it generates will also bring material benefits to passengers, with a broader choice of routes and competitive prices while benefiting the local and national economy by generating 14,000 new jobs and £1 billion of economic benefit[3] for the local area and region every year[4].

Full details of the scheme and the Development Consent Order process can be found either on the London Gatwick website here, or the Planning Inspectorate (PINS) website here.

The 2024 CIP included headline NRP investment, but we outlined a range of risks associated with the investment profile (2024 CIP Section 3.3.2 Northern Runway Risks). As we prepared our 2025 CIP, a decision on our Northern Runway Programme (NRP) planning application was still pending. We considered it inappropriate to re-publish an investment profile that we believed had been compromised by delays in the approval process for this project and that could not fully reflect the potential impacts of any planning conditions.

Now that the Secretary of State has approved the scheme, we are carefully examining the details of the planning consent, and assessing their impact and fully reviewing the scope, schedule, sequencing and cost of the programme. As part of this exercise, GAL will consider how the complex programme can be phased and integrated with "non-NRP" projects to maximise the benefits and minimise operational disruption for our passengers, airlines and partners as well as optimising capital efficiency. We expect this consolidated view to inform the 2026 CIP. This pre-NRP 2025 CIP therefore only includes a small allowance in 205/26 to cover the remaining investment to secure approval for the scheme.

A claim for judicial review has been lodged in the High Court against the Secretary of State's decision, and we intend to participate in the proceedings as an Interested Party. No allowance has been made at this stage for any costs that may be incurred by GAL in this undertaking.

[3] Measured as Gross Value Added (GVA)
[4] Source: "Economic Impact of the Northern Runway Project", Oxera August 2021

SECTION 3: 2025 CAPITAL INVESTMENT PROGRAMME

In preparing this 2025 CIP we have considered changes to our airlines, their schedules, their fleet and their business goals. We have taken a high-level view of the traffic outlook, and any impacts that might have on the airport's capacity. We have reflected both our own increased ambitions for sustainability and considered our business partners' aspirations. We have listened to our passengers, GATCOM's PAG and our airline customers and sought to match investment to passengers' priorities. This has resulted in the 2025 Capital Investment Programme, covering 5 years from April 2025 to March 2030, set out in Table 1 below:

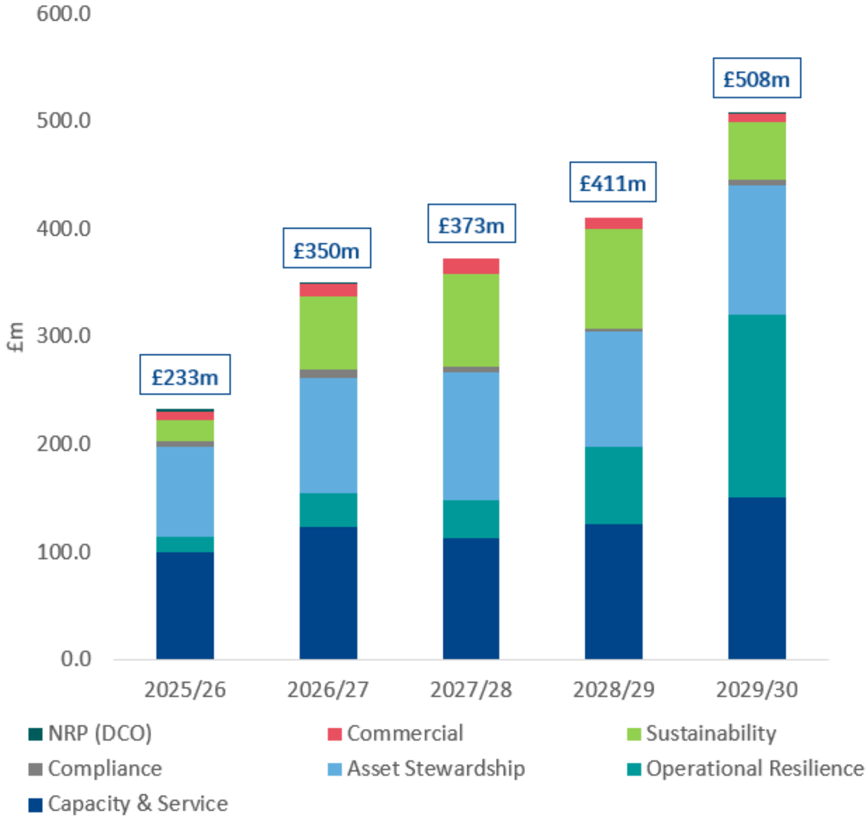
Table 1: 2025 pre-NRP CIP – Q2 2025 prices

Capital Investment Programme in Q2 2025 prices (£m)	2025/26 Outlook	2026/27 Outlook	2027/28 Outlook	2028/29 Outlook	2029/30 Outlook	5 Year CIP Total
					Investment in Year No Investment in Year	
Asset Stewardship, Operational Resilience & Compliance						
Asset Stewardship						
Main Runway Resurfacing						
Northern Runway Improvements						
Taxiway rehabilitation programme						
Air Traffic Control Asset Replacement Programme						
Instrument Landing System (ILS)						
Old Control Tower						
Shuttle Replacement						
Baggage - TBF						
NT Fire Alarm System						
Police Station						
Asset Replacement Decarb of Heat						
Pier 3 Structural Rehabilitation						
Winter Fleet Replacement						
Passenger Boarding Bridges						
Destinations Place Refurbishment						
Core Asset Stewardship						
ASSET STEWARDSHIP TOTAL	**83.0**	**106.5**	**112.7**	**107.0**	**120.5**	**529.8**
Operational Resilience						
Power resilience						
Networked stands / Wi-Fi enhancements						
Automation of baggage						
Lima Taxiway / Stands / Tango						
Drive through push & hold capacity/de-icing						
Taxiway / Airfield Infrastructure						
Additional centrelines						
Airport Operations Centre (APOC)						
Smart stand - Pier 6 pilot						
Ground Movemnet Controller						
Other Operational Resilience Projects (less than £1m each)						
OPERATIONAL RESILIENCE TOTAL	**11.6**	**29.2**	**40.4**	**71.3**	**165.2**	**317.6**
Compliance						
Central Search & Flight Connections						
Sussex Suite						
Staff Areas						
Next Generation Security Checkpoint						
IAS Plantroom						
Other Compliance & EHS Projects (less than £1m each)						
COMPLIANCE TOTAL	**7.3**	**8.0**	**4.7**	**3.0**	**5.0**	**28.1**
ASSET STEWARDSHIP, OPERATIONAL RESILIENCE & COMPLIANCE TOTAL	**101.9**	**143.7**	**157.9**	**181.4**	**290.7**	**875.5**

Capital Investment Programme in Q2 2025 prices (£m) continued	2025/26 Outlook	2026/27 Outlook	2027/28 Outlook	2028/29 Outlook	2029/30 Outlook	5 Year CIP Total
				Investment in Year		
				No Investment in Year		
Sustainability Projects						
Renewables Generation						
Decarbonisation of Heat						
Refrigerant Gas Emissions						
GAL Vehicle Fleet						
Electric Vehicles Infrastructure						
Hydrogen Vehicle Fuelling Station						
Pre-conditioned Air / Power on Stands / APU Off						
Surface Access (including Active Travel)						
Airspace Modernisation						
Surface Water Treatment Works						
Non-Potable Water Storage (lagoon)						
Non-potable Water Distribution						
Potable Water Reduction & Water Quality						
Biodiversity						
Electrical Infrastructure						
Other Decade of Change Projects (less than £1m each)						
SUSTAINABILITY PROJECTS TOTAL	**19.2**	**67.0**	**85.9**	**92.1**	**55.3**	**319.5**
Capacity And Service Projects						
Piers Internal Refurbishment						
Terminal Refurbishment - Look & Feel						
95% Pier Service (Pier 6)						
Check-in Automation						
Check-in capacity						
Automated Boarding Gates						
ST IDL Refurbishment						
NT IDL Expansion						
ST IDL Expansion						
NT Baggage Reclaim						
ST Baggage Reclaim						
Gatwick Roads						
Car Park Space Management						
Main Runway Technology Optimisation (MRO)						
Wayfinding						
IT & Innovation						
GLCC						
Minor Service Projects (less than £1m each)						
CAPACITY AND SERVICE PROJECTS TOTAL	**102.0**	**126.6**	**114.5**	**126.7**	**154.6**	**624.3**
Commercial Projects						
Hotel Redevelopment Programme						
Accommodation Strategy (Offices etc)						
Digital Media						
Car Parking - Product Development						
NT Short Stay Car Park (MSCP7)						
Robotic Car Parking System						
Productivity Initiatives						
IT Commercial Initiatives						
Commercial Minor Projects (less than £1m each)						
COMMERCIAL PROJECTS TOTAL	**7.2**	**11.9**	**14.4**	**10.0**	**7.9**	**51.4**
Future Growth Projects						
Northern Runway Development Consent Order						
FUTURE GROWTH PROJECTS TOTAL	**2.5**	**0.9**				**3.4**
TOTAL CAPITAL INVESTMENT	**232.9**	**350.0**	**372.5**	**410.2**	**508.5**	**1,874.1**

Figure 5 below gives a graphical view of the 2025 Capital Investment Programme annual spend profile, broken down by investment driver:

Figure 5: 2025 CIP annual investment profile by investment driver – Q2 2025 prices (£m)



3.1 2025 CIP SUMMARY

The 2025 Capital Investment Programme (CIP) forecasts investment of £1.9 billion between April 2024 and March 2029, guided by our core vision: ease, efficiency, and experience. This vision reflects meaningful collaboration with our airline partners and insights from the Passenger Advisory Group (PAG). To ensure we stay aligned with passenger expectations, we continuously monitor feedback through a range of channels -including our internal Quality of Service metrics, ACI and CAA Net Promoter Scores (NPS), and social media engagement. The programme is designed not only to enhance the passenger journey but also to address future capacity needs, bolster operational resilience, improve efficiency for both London Gatwick and the wider airline community, maintain critical infrastructure, and advance our ambitious sustainability targets.

A diverse portfolio of projects underpins these goals, including the addition of eight new pier-served stands at the North Terminal, a comprehensive campus-wide decarbonisation initiative, increased automation across the passenger journey, expanded international departure lounges in both terminals, and major upgrades to the taxiway network to strengthen airfield resilience.

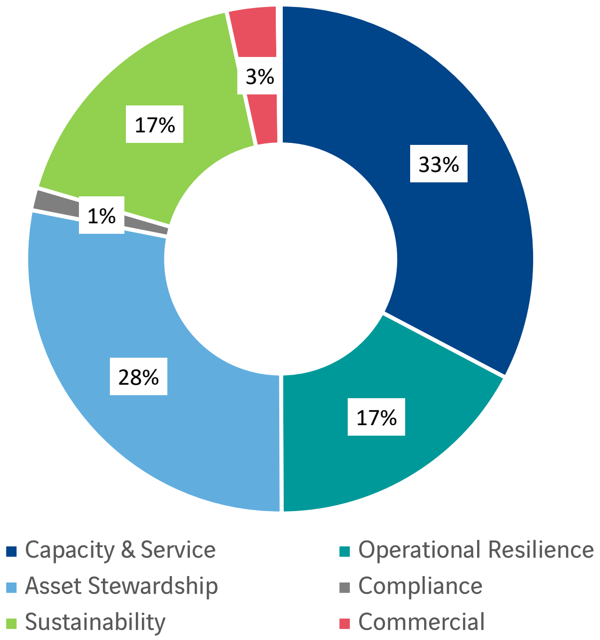
This 2025 pre-NRP CIP reflects our ongoing commitment to a well-balanced investment strategy. Of the total £1.9 billion:

- 33% (£600 million) is allocated to expanding capacity and enhancing service quality

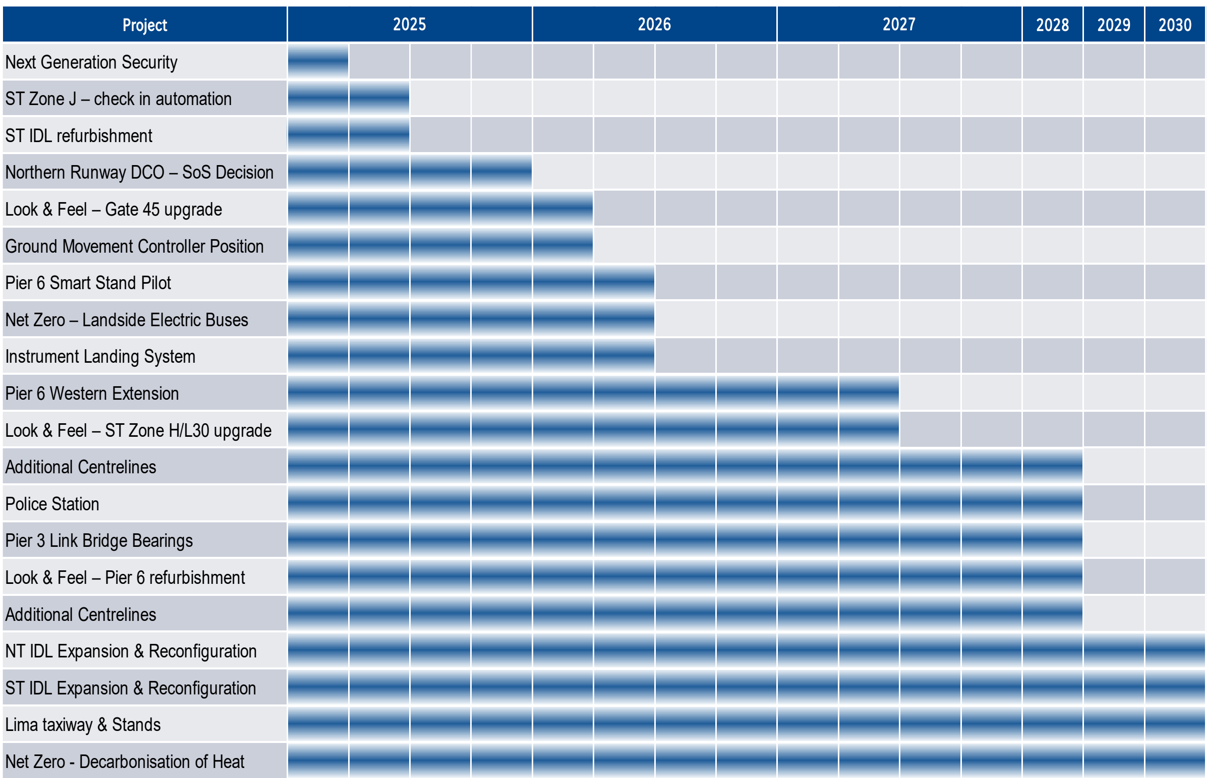
- 28% (£527 million) is dedicated to maintaining our extensive asset base
- 17% (£322 million) targets improved resilience and on-time performance (OTP)
- 17% (£319 million) supports our sustainability objectives
- 3% (£60 million) is reserved for commercially driven projects

Figure 6 provides a visual breakdown of the investment programme by strategic driver:

Figure 6: 2025 CIP by investment driver



3.2 2025 PRE-NRP KEY PROJECT TIMELINES



3.3 CAPITAL DELIVERY RISKS

As noted earlier in the document, the CIP is a dynamic, rolling five-year investment programme which is reviewed annually. It is a snapshot reflecting the business priorities, programme maturity and cost estimates at a point in time. Whilst this has always been the case, recent years have had a greater level of uncertainty than we have known before, and the investment environment continues to be challenging.

Section 2.2.1 outlines the macroeconomic risks and the potential impact on passenger confidence, but there are additional risks in planning for capital delivery, particularly over the longer term.

- Inflation: Consumer Price Index (CPI) inflation moderated through 2023 and briefly returned within Bank of England targets in mid-2024. However, persistent geopolitical and macro-economic pressures have kept inflation above target into 2025, with the Bank now projecting a return to target levels no earlier than 2026. HM Treasury's outlook remains cautious, anticipating subdued GDP growth of around 1% for the year. Construction inflation continues to outpace CPI, driven by structural labour shortages, regulatory cost burdens, and selective contractor pricing strategies. Although materials cost inflation stabilised in late 2024, volatility persists in specific product lines due to logistical disruptions and policy uncertainty. Labour remains the dominant cost driver, with wage growth exceeding 7% year-on-year and further increases expected due to National Insurance and Living Wage adjustments. At a local level, supply chain consolidation continues, with contractors maintaining defensive positions and prioritising risk transfer. Preliminaries and overhead recovery pressures are pushing tender prices higher, especially on complex or labour-intensive projects, two features which characterise many of the projects in the airport's pipeline. The combined effect of elevated input costs, regulatory compliance, and cautious market behaviour is expected to sustain tender price inflation above CPI throughout 2025.

- Emerging technology: this 2025 CIP includes substantial investment in sustainability across the period to achieve these vitally important objectives. However, the required technology is still maturing and therefore the investment will necessarily evolve as the technology matures. Since the publication of the 2024 CIP, we have continued to develop our understanding of the scope and scale of the work required for our sustainability investment portfolio and have reflected the impact of new heat sources on existing HVAC assets which are likely to need changing or enhancing in our asset replacement budgets. We also recognise that many businesses are working to decarbonise and that high demand for equipment and resources will drive increased prices. The flexibility built into London Gatwick's capital programme will allow us to track industry developments and adapt our plans to reflect the latest and best solutions.

- Supply Chain: we highlighted the fragility of the airport's post-pandemic supply chain in our 2024 CIP and whilst we have seen some encouraging signs of recovery the pool of suppliers remains smaller, tenders and contract execution are taking much longer as contractors seek to avoid risk. We continue to work hard with key construction suppliers to re-build their confidence in London Gatwick's programme and to encourage the re-establishment of local teams for smaller projects.

- Resourcing: availability of skilled resources remains a challenge across key construction disciplines, and there are a wide range of significant infrastructure projects (Stansted, Luton and Heathrow airports, Lower Thames crossing etc) in development which are competing for talent. Our focus remains on ensuring London Gatwick is seen as a vibrant, exciting place to build a career in construction with long term growth opportunities.

- Business rates: together with other UK airports we face a potential unprecedented rise in business rates because of a Government review. London Gatwick is already one of the largest rate payers in the country and this change could see us paying many times our current rate. This could significantly impact our business model and ability to invest in growth and development initiatives. We will continue to work alongside sector representatives to seek a workable solution with the Government.

3.3.1 SUMMARY

All the factors outlined above reinforce that the investment profile set out in the 2025 Capital Investment Programme (CIP) will remain dynamic and subject to change. The scale of the programme may expand or contract, and where a compelling investment case emerges, we will actively consider accelerating projects scheduled for later phases or introducing new initiatives. This approach reflects our ongoing application of the Commitments framework, as demonstrated in this 2025 pre-NRP CIP, where the main runway resurfacing has been added in response to evolving priorities. Flexibility remains essential to our ability to respond to shifting business conditions while upholding our commitment to invest in the best interests of our passengers and airline partners.

This document represents a capital investment programme issued as an output of, and for the purposes of, further consultation, and does not represent a mandatory investment programme.

SECTION 4: SUMMARY

This 2025 pre-NRP CIP set outs our plan to invest £1.9 billion over the next five years. It reflects ambitious plans for transformation, while at the same time focussing on sustainable growth. By putting the needs of our passengers and airlines alongside our responsibilities to local communities, our investment plans can deliver the biggest benefit to the highest number of people. As London Gatwick grows, the whole region continues to thrive.

The programme balances maintaining our existing asset base, protecting operational resilience and meeting all our compliance requirements with plans to make our passengers' journeys through the airport easier, our airline customers' operations more efficient and to continue to transform the experience of using London Gatwick.

Innovation and creativity will be critical to achieving our sustainability goals. We made great progress in our first Decade of Change, but to achieve the targets we have set ourselves for this decade will require a step change in how we think about everything we do. Our capital programme will provide vital investment in specific sustainability projects, but to deliver our goals we will need to do more and consider sustainability in every project and programme we undertake; what we build, how we build it and how we operate it.

After a rigorous and lengthy planning process, the Government has now approved our Northern Runway proposal, which will bring growth to London Gatwick, our region and the UK. We welcome the Secretary of State for Transport's decision which will unlock over 14,000 jobs and add £1 billion to the regional economy annually. Whilst we assess the details of the planning consent on the scope, schedule, sequencing and cost of the programme., our 2025 pre-NRP CIP continues to invest in improvements to services and facilities that will deliver our vision of ease, efficiency and experience for all our passengers, whatever their journey.

APPENDIX

CORE SERVICE STANDARDS (REBATE) SCHEME (FROM 2025/26 CONDITIONS OF USE)

	Standard	Metric	Target Level	Maximum potential rebate (both terminals, unless noted)
(i)	**Passenger satisfaction measures**			
	Departure Lounge Seat Availability	Moving Quarterly Average QSM score	4.0	0.20%
	Cleanliness		4.0	0.20%
	Way-Finding		4.1	0.20%
	Flight Information		4.2	0.10%
	Passenger Wi-Fi		4.0	N/A
	Special Assistance	Moving Quarterly Average PRM survey	4.0	N/A
(ii)	**Security**			
	Central Passenger Search	Times <5 Minutes & Times <15 Minutes	95% 98%	1.0%
	Central Passenger Search[1]	Day when single time slice > 30 Minutes	Single event per day	0.05% per day (0.7% max per month)
	Staff Search (Atlantic and Jubilee)	Times <5 Minutes	97%	0.175%
	Staff Search (Terminals)	Times <5 Minutes	97%	0.175%
	External Control Posts Search	Times <10 Minutes	95%	0.35%
(iii)	**Passenger operational measures**			
	Passenger Sensitive Equipment (General)	% Time Available	99%	0.05%
	Passenger Sensitive Equipment (Priority)	% Time Available	99%	0.30%
	Inter Terminal Shuttle System	% Time 1 Car Available & % Time 2 Cars Available	99% 97%	0.50% (NT)
(iv)	**Airline operational measures**			
	Stands	% of required occasions (arriving aircraft)	99.5%	0.15%
	Jetties	% of required occasions (arriving aircraft)	99%	0.30%
	Pier Service	Moving annual average % passengers pier served	95%	0.50%
	Fixed Electrical Ground Power	% of required occasions (arriving aircraft)	99.5%	0.15%
	Runway Availability and Capacity	Dual metric which considers: a) the physical condition of the runway; and b) Local ATM flow restrictions resulting from lack of resources (eg air traffic controllers) or failure of equipment (eg navigation aids) directly within the control of Gatwick Airport Limited		Depends on duration: 15 mins to 45 mins (£100,000) >45 mins (£200,000) Maximum annual penalty 0.50%

	Standard	Metric	Target Level	Maximum potential rebate (both terminals, unless noted)
	Self-Serve Bag Drop Availability		TBD[2]	0.10%
(v)	**Baggage Measures**			
	Arrivals Reclaim (Baggage Carousels)	% Time Available	98.5%	0.40%
	Outbound Baggage	OBP Daily	98%	0.175% daily 0.70% monthly (0.7% max per month across both Outbound Baggage measures)
	Outbound Baggage	OBP Monthly	99%	
(vi)	**IT Measures**			
	Flight Information Display Screen system	% Time Available	99.9%	0.10%
	Community App Availability	% Time Available	99.5%	0.10% (Airport level)
(vii)	**Assisted Travel**			
	Assisted Travel	ECAC arrivals target achievement (monthly)	98% pax in: 20 mins (notified) 45 mins (un-notified)[3]	
	Total			**7.25% (NT)** **6.75% (ST)**

[1] In a day when the single time slice is greater than 30 minutes the maximum daily penalty is 0.05% with a maximum monthly penalty of 0.70%.

[2] Software updates are due from the equipment supplier at end of March 2025 to enhance availability reporting capabilities and ensure accuracy ahead of GAL's proposals for the new metric.

[3] ECAC arrivals targets are set out in CAA CAP1228.

Calculation and measurement of the Core Service Standards will be undertaken in accordance the "Gatwick Airport Core Service Standards Handbook" which may be amended from time to time by agreement between Gatwick Airport Limited, the Gatwick Airline Operators Committee and the Gatwick Airport Consultative Committee.

AIRLINE SERVICE STANDARDS

Standard	Metric	Target Level	Reduction Percentage
Check-in performance – queue time	Times <30 Minutes	95%	1.0%
Arrivals bag performance – last bag on carousel	Times <55 Minutes (large aircraft) Times <40 Minutes (small/medium aircraft)	95%	0.50%

Calculation and measurement of the Airline Service Standards will be undertaken in accordance the "Gatwick Airport Airline Service Standards Calculation Guide" which may be amended from time to time by agreement between Gatwick Airport Limited, the Gatwick Airline Operators Committee and the Gatwick Airport Consultative Committee.