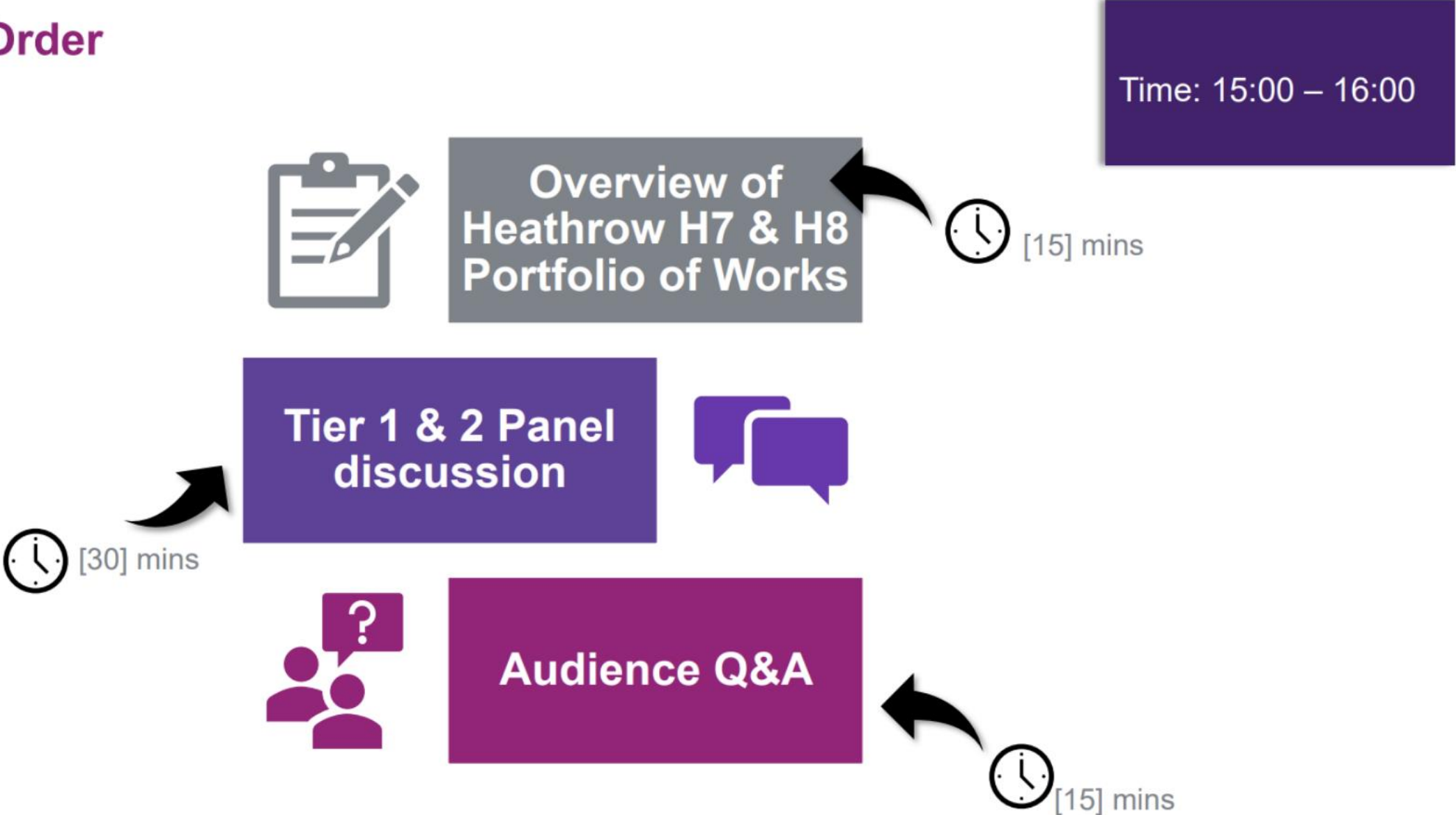


Marta Ayling

Head of Infrastructure Procurement, Heathrow

Unlocking your Opportunities working with Heathrow
and its Suppliers

Running Order



Slido



Delegates can ask anonymously and vote for the questions they like, bringing the most important topics to light.

Please select the room ‘Procurement Workshop: Infrastructure’

Visit **www.slido.com** and use the code **#heathrowsummit** or you can also download the app and follow the same steps.

SUPPLY CHAIN OVERVIEW

Heathrow's extensive operations provide a variety of opportunities for businesses to join our supply chain, whether directly or indirectly through our network of supply chain partners. Maintaining smooth airport operations depends on sourcing a wide array of works, goods, and services across areas like Cyber and Technology, Infrastructure, and Operational procurement.

Tier 1 Suppliers

No. of suppliers have direct contractual relationship with Heathrow:

1200+

SME Tier 1 Suppliers

% of SME suppliers in all Tier 1 suppliers:

55% +

Annual Spend

Annual spend with all tier 1 suppliers in GBP:

1.5 Bn

This afternoon you will hear about our Infrastructure procurement opportunities!

H7 Portfolio landscape



Attributes	Asset Management & Compliance (AMC)	Carbon & Sustainability	T2 Baggage	Security	Commercial	Efficient Airport
	 ▪ £2.1bn. Approx £350m p.a. ▪ Typically, small – medium projects, higher volume. Lower complexity & risk (Excl. runway resurfacing and T4 Hold Baggage Screening) ▪ Limited multi-contractor interfaces on individual projects ▪ Complex project sequencing ▪ Some repeatability	 ▪ £0.3bn. Approx £100m p.a. ▪ Medium size projects, some multi-contractor interface (e.g., airport vehicles, surface access building and infrastructure.) ▪ Mixed complexity & risk	 ▪ £0.4bn. Approx Peak £180m p.a. ▪ 5 tranches ▪ Large, multi-contractor interfaces ▪ High complexity & risk. Systems integration ▪ Differing margin expectations	 ▪ £0.8bn. Approx peak £260m p.a. ▪ DfT compliance dates ▪ Regulatory trigger dates ▪ High complexity & risk. Impact on operations	 ▪ £0.5bn. Approx £50m p.a. ▪ Mixed portfolio, some higher-complexity developments (e.g., cargo and car park consolidation)	 ▪ £0.3bn. Approx peak £150m p.a. ▪ Mixed portfolio, of medium size projects to optimise operations (e.g., wayfinding, connections, ground handling, tools & data)
Outcome	Efficiency & Productivity	Return on Investment (carbon)	System & Delivery integration	Timely compliance	Return on Investment (revenue)	Efficient Operations (speed & savings)

H7: the Supply Chain

Lead
Designer/
Integrator:

MPP(s)/
ARP(s):

Capital
Partner(s):

ICS
Partner(s):

Technology
Partner(s):



ICS = Information & Communication Systems. The separate Minor works to be undertaken by the Atkins Minor Works team as required within the Programme(s).

Supply Chain – Infrastructure Delivery Partners

Asset Renewal
Partner (ARP)
Terminal 3, 4 & 5



Asset Renewal
Partner (ARP)
Terminal 2



Asset Renewal
Partner (ARP)
Civils

ferrovial

Major Programme
Partner (MPP)
Regulated Security



Major Programme
Partner (MPP)
T2 Baggage



Major Programme
Partner (MPP)
Runway
Rehabilitation



Major Programme
Partner (MPP)
Resilience Partner



Other tendered project partners



Tier 2 & Tier 3 Subcontract / Subconsultant Packages:

- Site Clearance
- Demolition
- Utility diversions
- Temporary works
- Groundworks
- Structural works
- Road construction
- Pavement & surfacing
- Specialist installations
- MEP
- Cladding & façade systems
- Roofing
- Windows & glazing
- Internal Partitions
- Suspended ceilings
- Flooring
- Security systems
- Landscaping
- External works
- Environmental works
- Site accommodation
- Site Logistics
- Temporary utilities
- Welfare facilities
- MMC / off-site components
- Multi-Dis Designers
- Architects
- Site Investigations
- Surveying specialists
- Etc.....

Heathrow

Supply Chain - others

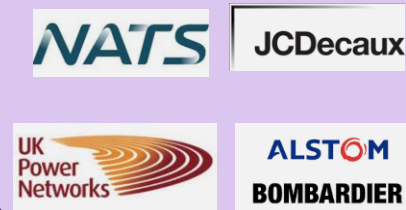
Programme Designers



Planning & Controls



Specialists (direct)



T1/ T2 Baggage



Resilience Partner



Design & Engineering



Consultancy



Specialists (indirect)



Minor Works



Noise Insulation



Independent Fund Surveyor



Logistics Integrators



Specialists (material)



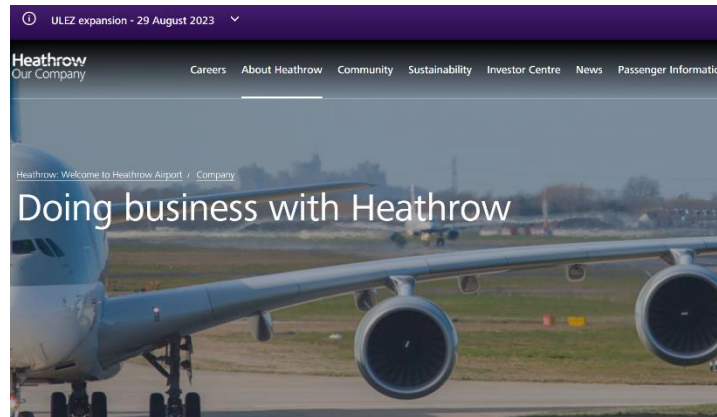
Technology



Heathrow

FINDING INFORMATION & ACCESSING OPPORTUNITIES

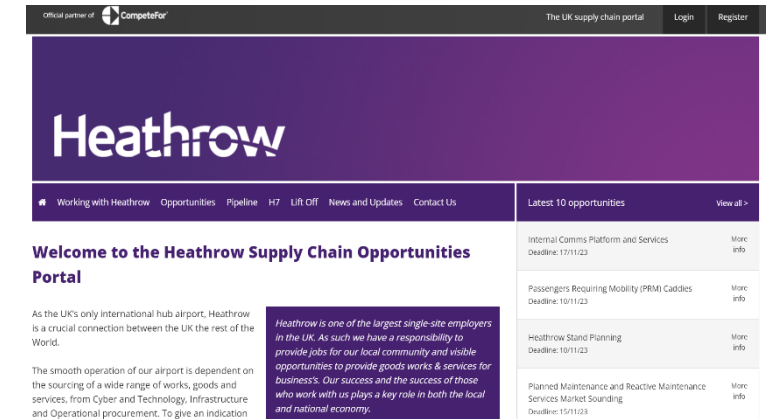
DOING BUSINESS WITH HEATHROW



SUPPLIER GUIDE



COMPETEFOR



<https://www.heathrow.com/company/doing-business-with-heathrow>

<https://www.heathrow.com/company/doing-business-with-heathrow/supplier-support-and-tools>

<https://www.competefor.com/heathrow/>

If you have any questions, please email procurement@heathrow.com or sme-engagement@heathrow.com if you are SME.

HEATHROW PIPELINE 2025/26



PROCUREMENT OPPORTUNITY PIPELINE - INFRASTRUCTURE

Programme	Opportunity Description	Estimated Project Spend	Planned Engagement Window	Buyer
Regulated Security	T5 Security Transformation - future work streams	£22.1m	Q4 2025	Mace
Regulated Security	T3 Security Transformation - future workstream	£6.7m	Q1 2026	Mace
Regulated Security	Tranche 4 Security Transformation - control post & external works	£30m	Q2 2027	TBC
Regulated Security	Tranche 4 Security Transformation - lane installations	£10m	Q2 2027	TBC
Commercial Revenue	Control Post - Centre	£400m	Q2 2026 - Q1 2027	Ferrovial Construction; Laing O'Rourke
Commercial Revenue	T4 Front Door & Car Park	£300m	Q2 2026	Vinci Building
Commercial Revenue	Minor retail works	Up to £1m (per project)	Q4 2025- Q4 2026	Heathrow (from minor works frameworks)
Commercial Revenue	Park & Ride 2/3 (formerly T2/3 long stay)	£20m	Q1 2026	Ferrovial Construction
Multi-programme	Framework Agreement for Demolition	£200m	Q4 2026	Heathrow
Efficient Airport	Border Force Holding Rooms - T2, T3 & T4	£30m	Q2 2026	Mace
Efficient Airport	T5 Additional Coaching Gate - pavement modifications & Gate 10F	£30m	Q3 2026	Mace
Efficient Airport	T4, T5 (Wave 2), Estates & Rail LED Replacement	£5m	Q2 2026	Mace & Mitie
Efficient Airport	T5 Heating, Ventilation and Air Conditioning (HVAC) Electronically Commutated (EC) Fan Upgrades	£10m	Q2 2026	Mace
Efficient Airport	T2, T3, T4 & T5 eating, Ventilation and Air Conditioning (HVAC) Air Handling Units (AHU) Upgrades	£40m	Q3 2026	Mace / Ferrovial / VolkerFitzpatrick
Efficient Airport	T2, T3, T4 & T5 Pump Upgrades	£50m		Mace / Ferrovial / VolkerFitzpatrick
Efficient Airport	T2, T3, T4 & T5 Building Management Systems (BMS) Optimisation	£5m	Q4 2026	Honeywell (T2) and BMSI (T3, T4 & T5)
Efficient Airport	International Efficiency (IE5) Baggage Motors Upgrade - phases 1, 2 & 3	£5m	1Q 2026	Vanderlande Industries
Efficient Airport	Airfield Optimisation - road, parking & space modifications	£5m	1Q 2027	M Group / Ferrovial / VolkerFitzpatrick

PROCUREMENT OPPORTUNITY PIPELINE - INFRASTRUCTURE

Programme	Opportunity Description	Estimated Project Spend	Planned Engagement Window	Buyer
Efficient Airport	New Fleet and Airline Entrants & Exits - civils & fixed infrastructure modifications	£5m	Q2 2026	M Group / Ferrovial / VolkerFitzpatrick
Efficient Airport	Virtual Control Facility (VCF) Enhancements - mast installation	£5m	Q1 2027	Mace
Efficient Airport	Baggage Transformation - conveyor belt length modifications & baggage racking	£2m	Q2 2026	Vanderlande Industries / MJM Industrial
Efficient Airport	T3 & T4 Self-Service Bag Drop (SSBD) - retrofit / installation of units	£10m	Q3 2026	Beumer, Amadeus, Vanderlande
Efficient Airport	Passengers with Reduce Mobility (PRM) projects - wheelchair bay modifications	£5m	Q4 2026	AtkinsRéalis
Consultants & Logistics	H8 Design Partners	TBC	Q2 2026	Heathrow (various)
Consultants & Logistics	H8 Consultancy Framework	TBC	Q2 2026	Heathrow (various)
Consultants & Logistics	T5 Airside temporary welfare provision	£5m	Q1 2026	Mace (tbc)
Consultants & Logistics	Safe walking routes assessments and mitigations	£0.5m - £1m	Q4 2025	Various
Consultants & Logistics	Logistics Integration Service (excludes RGS - Opex)	£9m	Q3 2026	Wilson James
Carbon and Sustainability	Pre-Conditioned Air (PCA) future phases	£93	Q1 2026	Ferrovial
Carbon and Sustainability	Central Bus Station (CBS) eBus Charging	£10	Q1 2026	Ferrovial
Carbon and Sustainability	eBus Charging Depot (Heathrow)	£10	Q2 2026	Ferrovial
Carbon and Sustainability	Bus + Coach ebus Charging	£12	Q4 2025	Ferrovial
Carbon and Sustainability	Easterly Alternation Infrastructure - Enabling Works	£0.2		VolkerFitzpatrick
Carbon and Sustainability	Main Delivery - Northern Runway (Oct 26 to Mar 29)	£33.4	Q2 2026	VolkerFitzpatrick
Carbon and Sustainability	Main Delivery Noise Barrier Oct 26-Mar 27	£4.0	Q2 2026	VolkerFitzpatrick

PLANNING FOR H8



OUR H8 PLAN IS AMBITIOUS

Customer led approach: We have listened to our passengers and airline community. We have spent a year working closely with airline partners to develop our plan.

- Hosting over 120 hours of joint planning.
- Hearing from more than 2 million passengers to understand what matters most.

Our customer-led business plan is aligned with their priorities and delivers

Better
resilience

Better
passenger
experience

Better use of
new and
existing
capacity

Better
sustainability

Value for money at a passenger charge of £33.26

This will be delivered through a £10bn capital portfolio, with a £0.5bn of efficiency stretch.

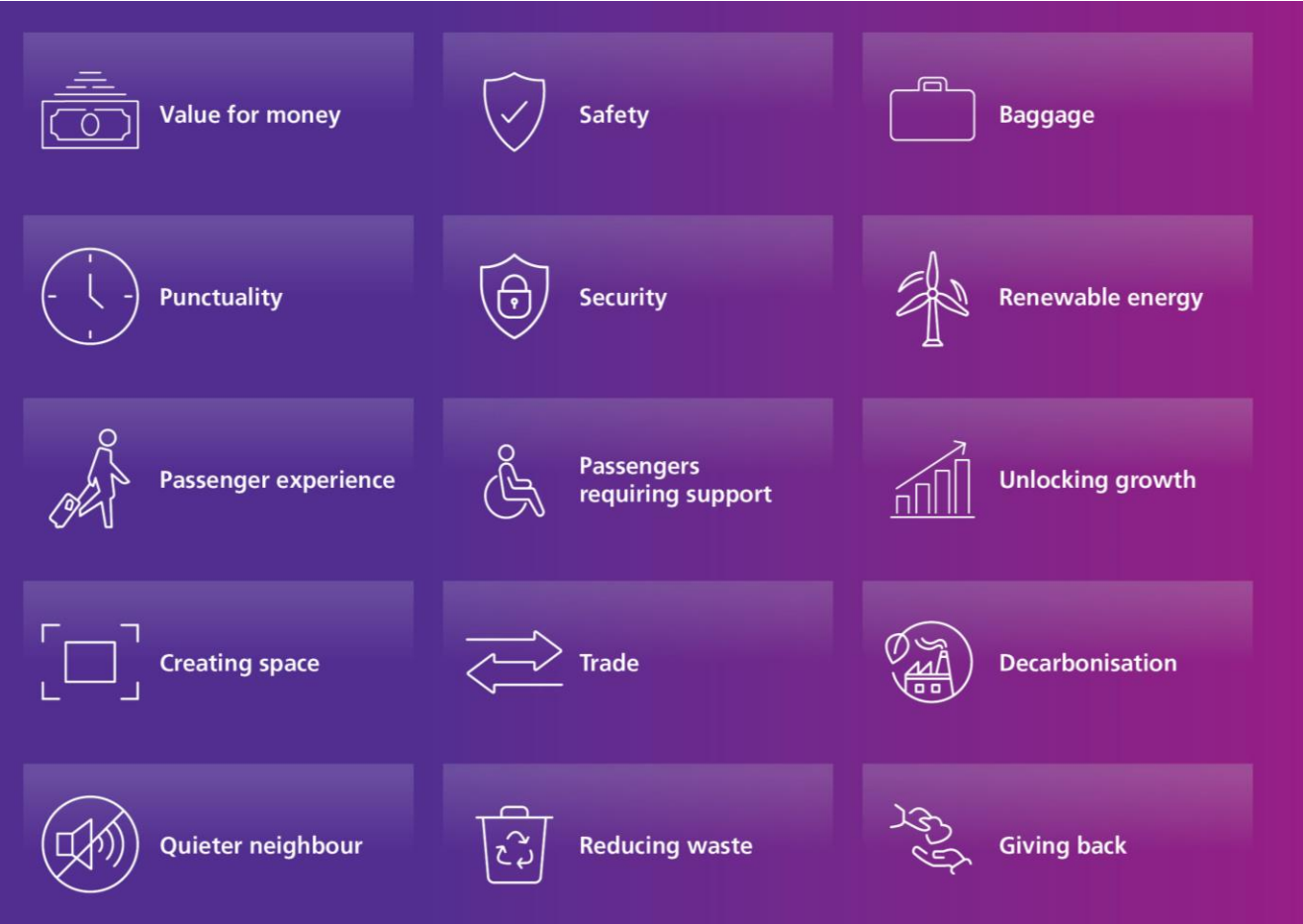
Heathrow's H8 Business Plan 2027-2031

July 2025



15 TANGIBLE WAYS OUR CUSTOMERS WILL SEE A DIFFERENCE:

These objectives have been developed from stakeholder insights obtained through discussion and research. They add detail to our own strategic ambitions and ensure that all stakeholders will see a difference



H8: £10 BILLION INVESTMENT PLAN TO MAKE EVERY JOURNEY BETTER

Most significant transformation in over a decade

Pending CAA approval, our H8 plan is focused on a £10 billion, privately funded investment package that will:

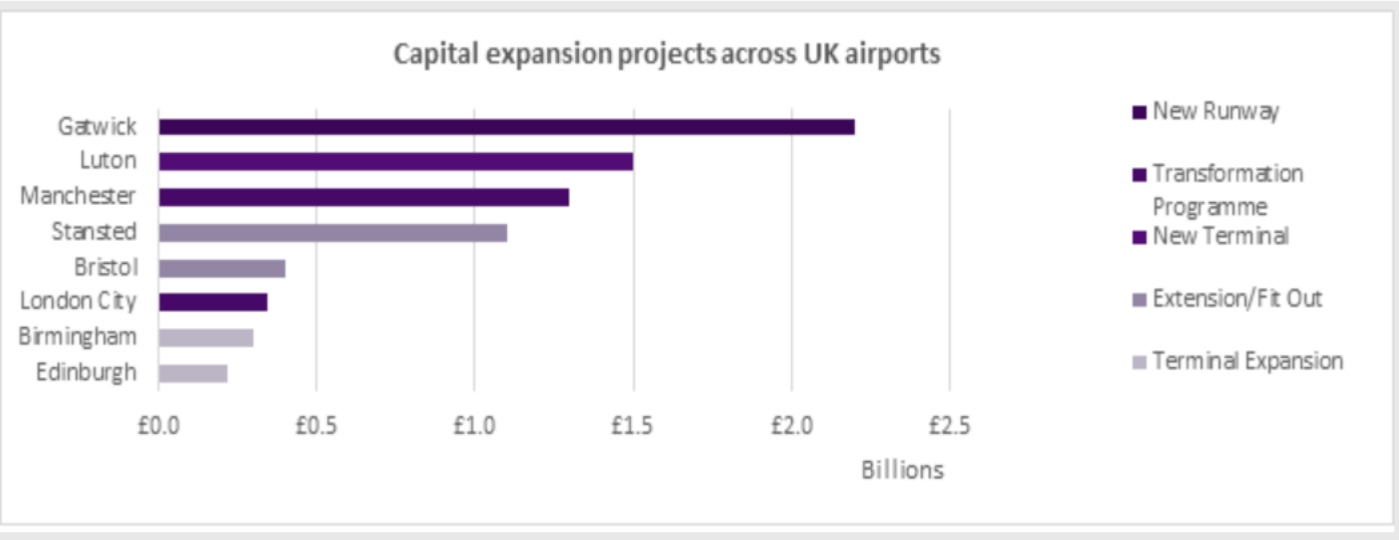
-  Add more capacity
-  Deliver a world-class airport experience
-  Build a more sustainable Heathrow by reducing our environmental footprint
-  Create new terminal space within existing terminals, including new lounges, shops and restaurants

£ Our ambitious plan will deliver this through major investment that is 100% privately financed, without using taxpayer money.

MARKET LANDSCAPE

The aviation sector is navigating a sector wide uptick in demand, with multiple competing major projects all taking place over the next 5 years, ramping up the scale of aviation demand over 13x comparatively against the previous 5 years (2020-2025).

The figure below showcases the c.£7bn of capital works spend in UK airports across 2027-2031 that will directly overlap with Heathrow investment plans.



Projected UK Airports capital works spend.

Ensure Heathrow achieves its ambition of sustainability delivering world-class infrastructure while accessing the innovation and capacity it needs

Enable businesses to confidently make long-term investments in their capability and skills base, creating jobs and driving growth across the UK

Support suppliers to understand Heathrow's standards and ways of working

Build advocacy in local communities, calling businesses to play a part in delivering H8, leaving a legacy of shared benefits and positive impact

Legacy & Growth: Supporting suppliers, enabling long-term business investment, creating jobs, and driving growth across the UK.

Slido



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Heathrow
(Chair)

Charlotte Hurlow
Associate Director,
Arup

Adrian Yung
Commercial Director,
Mace

Philip Tarrant
Director,
AtkinsRéalis

Matt Ghinn
Operations Director,
VolkerFitzpatrick

Brian Horan
Senior Commercial Manager,
Ferrovia

Sven Heuten
Special Projects Director,
Onwave

Unlocking your Opportunities working with Heathrow and its Suppliers



Arup is a global consultancy offering multidisciplinary design and advisory services. In aviation, it supports airport planning, design, and sustainability. Its 40-year partnership with Heathrow delivers integrated solutions for capital investment, operations, and climate goals - helping the airport grow resiliently and lead in passenger experience and sustainable aviation.

Charlotte Hurlow Associate Director

Charlotte manages Arup's relationship with Heathrow Airport, drawing on 20 years of experience in operations consulting and baggage systems. She now oversees diverse Arup disciplines at Heathrow, including commercial programme design, heat network decarbonisation, baggage, security, airspace, and advisory roles, ensuring strong collaboration and strategic delivery across the airport.

AtkinsRéalis

AtkinsRéalis design and deliver transformative infrastructure and energy solutions worldwide. From cities to nuclear power, our 36,000-strong team connects people, data and technology to shape a more sustainable future. Guided by purpose and principles, we innovate, manage resources, and create lasting value for communities across six continents.

Phil Tarrant Director

Phil is a Director at AtkinsRéalis, a Tier 1 supplier to Heathrow. Since 2013, he has led the H7 Professional Services Framework, delivering design and advisory support to strategic programmes. He champions collaboration, helping Team Heathrow partners unite to create innovative, value-driven solutions for the airport's future.

Ferrovial Construction (UK) Limited

Ferrovial Construction delivers complex infrastructure projects across transport, energy, and water sectors. Operating in the UK and Ireland since 2003, we've led major works like Heathrow, Crossrail, HS2, and Silvertown Tunnel. Our diverse teams drive innovation, exceed expectations, and create sustainable legacies through full asset lifecycle expertise.

Brian Horan Senior Commercial Manager

Brian is the head of quantity surveying and procurement for Ferrovial at Heathrow on the H7 framework. Joining Ferrovial in 2018 on the Q6 framework, he previously worked on Heathrow T2 and various gas plants UK wide for EPC contractors.

Mace

Mace is a global construction company offering development, consultancy, contracting, and operations in over 70 countries. Since 1990, it has grown to 8,000+ employees. Heathrow Airport Limited, Mace's longest-standing client since 1992, has shaped a collaborative relationship, adapting together to evolving airport industry demands and market conditions over three decades.

Adrian Yung Commercial Director

Adrian, Commercial Director for Mace Infrastructure, has led commercial aspects of UK airport projects since 2006. He oversees 56 live projects, managing procurement, contracts, and risk. His collaborative approach ensures cost certainty and delivery success. Adrian believes strong procurement and balanced risk drive project outcomes across Heathrow and Gatwick frameworks.

VolkerFitzpatrick

VolkerFitzpatrick, a leading UK engineering and construction firm, partners with Heathrow Airport to deliver its H7 Runway Rehabilitation Framework. With expertise across sectors including rail, energy, and aviation, we deliver innovative, sustainable projects. Safety, collaboration, and quality define our approach as we support Heathrow's journey to net zero by 2050.

Matt Ghinn Operations Director

Matt Ghinn FCIOB is an experienced Operations Director with 20+ years in UK infrastructure and rail. He leads transformation through digital innovation, lean methods, and enterprise change. With a diverse background - from genetics to military service - Matt champions creative problem-solving, delivering complex projects and multi-billion-pound frameworks with strategic, collaborative leadership.

Onwave

Onwave delivers networking, geofencing, and managed connectivity for critical infrastructure sectors like rail, highways, and aviation. As an authorised Starlink reseller, we enable rapid, resilient deployments with advanced cybersecurity and NOC support. Our OWL geofencing enhances airside safety, and we proudly partner with Heathrow, earning a Lift Off Award in 2024.

Sven Heuten Special Projects Director

Sven Heuten, Chartered Civil Engineer and ICE Fellow, brings 18+ years' experience in construction, driving innovation and efficiency. Former Director at LCI UK Projects, he led the Lean Construction Development Program. Now Special Projects Director at Onwave, Sven champions technology and business improvement, shaping the future of construction.

ENGAGING WITH OUR PARTNERS

Heathrow

Supplier Engagement or Support Platform

- <https://www.competefor.com/heathrow/opportunities/>
- <https://www.heathrow.com/company/doing-business-with-heathrow>

General Contact E-mail

- procurement@Heathrow.com
- sme-engagement@heathrow.com

Charlotte (Arup)

Supplier Engagement or Support Platform

- www.arup.com/aviation

General Contact E-mail

- charlotte.hurlow@arup.com

Adrian (Mace)

Supplier Engagement or Support Platform

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- sfoster@aviationsupplychain.com
- <https://www.competefor.com/>

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- Jessica.Robinson@macegroup.com
- Anthony.Morgan2@macegroup.com

Matt (VolkerFitzpatrick)

General Contact E-mail

- kevin.frost@volkerfitzpatrick.co.uk

Brian (Ferrovia)

Supplier Engagement or Support Platform

- <https://www.buildadvisor-construction.com/portal/review?rd=2>

General Contact E-mail

- h7procurement@ferrovial.com

Phil (Atkins)

General Contact E-mail

- Transportationsupplychain@atkinsrealis.com
(Contact: Emma Ireland or Colin Nicholson)

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