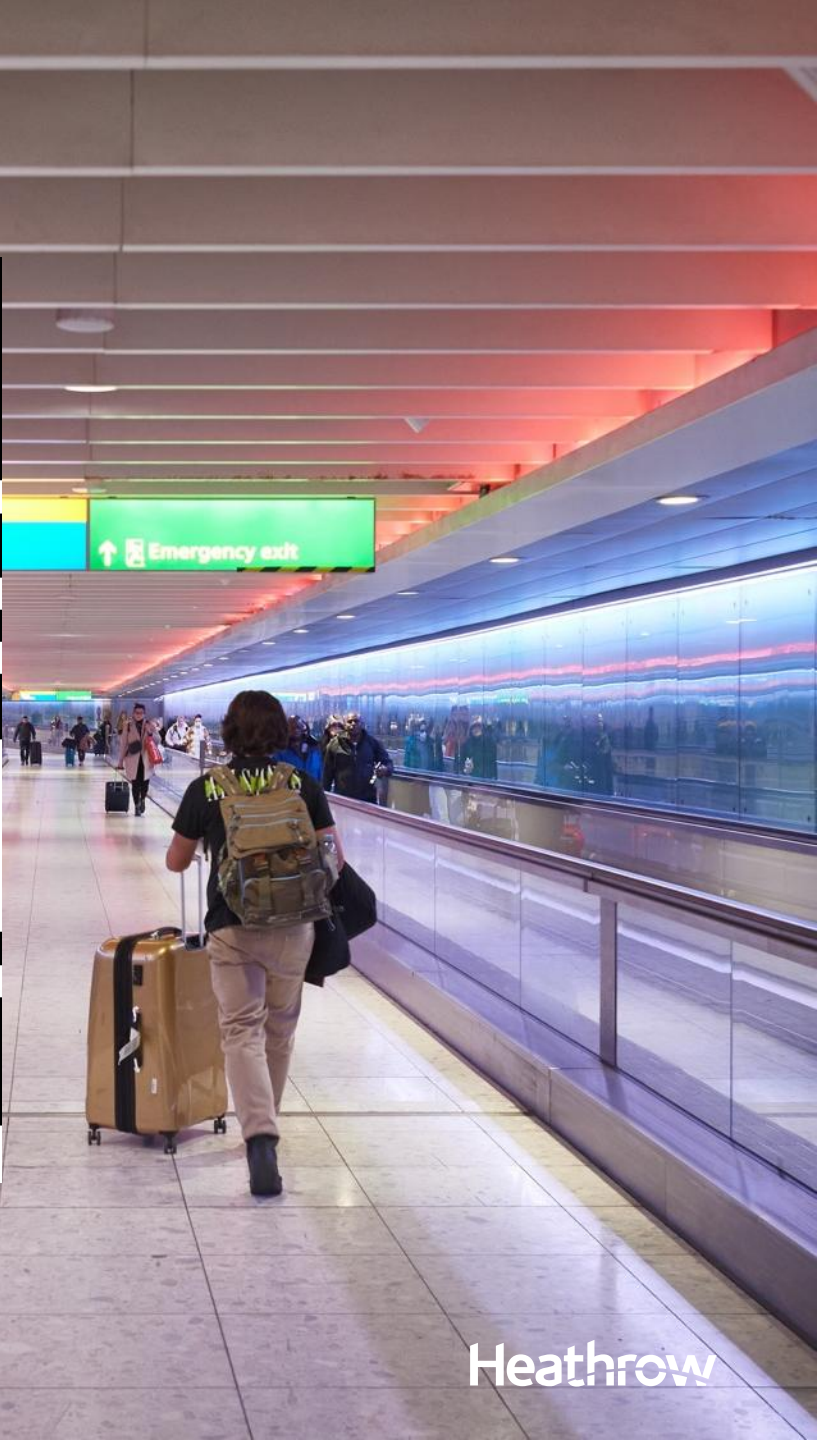


HAVE A QUESTION?



HEATHROW BUSINESS SUMMIT 2025

OPERATIONS PROCUREMENT 2026 OPPORTUNITIES

***“UNLOCKING YOUR OPPORTUNITIES WITH HEATHROW
& ITS SUPPLIERS”***

November 2025



TODAY'S PRESENTERS

Simon Butterfield

Head of Procurement, Operations, Heathrow

Cara Stewart Senior Category Leader

Denzyl Siaw Senior Category Manager

Dominic Cortes Contract Manager

Kulsoom Kabri Contract Manager

Rebecca Mupita

Managing Director, Transdev Airport Service &
CCH aviation sector

Chris Watts

Head of Hard Services & technical services
Mitie

Pirabuji (Pira) Paskaramoorthy

Commercial Group Leader
Vanderlande



Unlocking your Opportunities working with Heathrow and its Suppliers

HAVE A QUESTION?



LANDSCAPE: WHAT WE LOOK AFTER

Heathrow ISO Certified
Environment, Energy and Asset Management



72

Miles of high-pressure fire water mains, 6 balancing ponds pollution control and largest private water network in Europe



320

HV substations – the largest privately owned network in Europe

Multiple building management, control and fire safety systems



44
Tunnels



2

4 million sqm metres of pavement



5

Terminal Buildings

15 Chilling Stations

28 Cooling towers

23 Large Scale Boilers

125 km Roads



7500
CCTV cameras



2000
Flight info screens



9000
Access control readers

900

Lifts, Escalators, Moving walkways



76 Hold baggage Xray Machines

165 Cabin Baggage Xray Machines

200 Non Terminal buildings

200 Loading Bridges

160

Welfare facilities

>30km

Baggage belts in Terminal 5



Plus much more !!

40

Baggage reclaim belts

Circa 40million bags per annum



780 Direct Colleagues
2000 Partners

30 Light Rail Vehicles
17.2KM Track/Guideway

£10m
Stock

Heathrow

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.

Suppliers

No. of suppliers have direct contractual relationship with Heathrow:

1300+

SME Suppliers

% of SME suppliers in all suppliers:

55% +

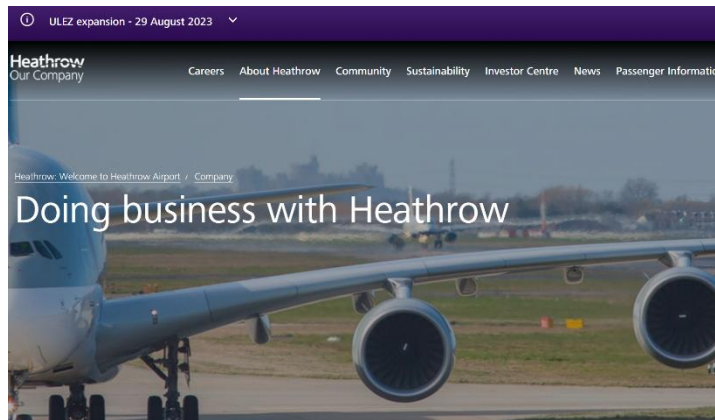
Annual Spend

Annual spend with all suppliers in GBP:

2+Bln

FINDING INFORMATION & ACCESSING OPPORTUNITIES

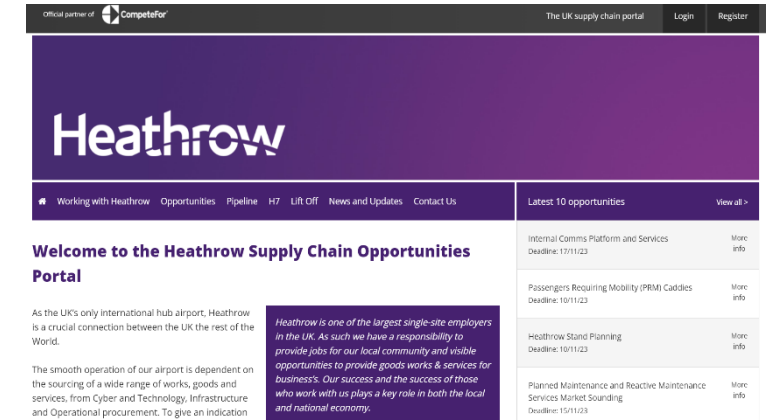
DOING BUSINESS WITH HEATHROW



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.

PROCUREMENT OPPORTUNITY PIPELINE – OPERATIONS

Category	Opportunity Description	Estimated Project Spend (if available)	Planned Engagement Window
Civils Maintenance	Tender for Statutory Inspections and Legionella Testing	£3m	Q4 2025
Civils Maintenance	Tender for landscaping services across landside and airside	£3.5m	Q4 2025
Civils Maintenance	Tender for drainage and gulley	£0.4m	Q4 2025
Rail Maintenance	Review products and services for rail category	TBC	Q1 2026
Facilities Management	Eastern Business Park Leasing and Managing Agency	£0.5m	Q4 2025
Airside Operations - Winter Support	Tender for Winter De-icing Products	£1.5m	Q4 2025
Airside Operations - Aerodrome Safeguarding	Tender for Instrument Flight Procedure	£350K	Q4 2025
Waste Water Maintenance	Chemical Water Sampling	£0.3m	Q1 2026
Asset Maintenance and Service	Bacteria management at Mayfield Farm	£0.2m	Q1 2026
Environmental Monitoring Service	Air quality monitoring	£0.2m	Q4 2025
Utilities-Renewables-Supply	Supply of Biomass Fuel	£2m	Q3 2025
Fleet - Tyres (Airside)	Review of Tyre Providers	£500k - £1m	Q1/Q2 2026
Fleet - Tyres (Landside)	Review of Tyre Providers	£500k - £1m	Q1/Q2 2026
Fleet - Bodywork	Review of Bodywork Providers	£50k - £100k	Q1/Q2 2026
Fleet - Breakdown Services	Breakdown Cover	£50k - £100k	Q1/Q2 2026
Surface Access (Commercial)	Onward Travel	£300k p.a.	Q1/Q2 2026
Surface Access (Commercial)	MSCP5 Spaces (Level 4) for Car Club Operations	£50k p.a.	Q3/Q4 2026
Airport Fire and Rescue Service	LGV Driving (training) Initial for Fire Service	£50K	Q2 2026
Utilities-Renewables-Supply	Solar Panel - Review products and services	TBC	Q3 2025
Utilities-Renewables-Supply	PPA's (power purchase agreement)	TBC	Q3 2025
Engineering	Tunnelling & Cabling Review	TBC	Q4 2025
Commercial	HVIP Catering	TBC	Q2 2026
Surface Access (HSTZ)	Multi-Year Christmas Day Bus Services	TBC	TBC
Services	Lost Property	TBC	Q4 2025

CIVILS MAINTENANCE: OPPORTUNITIES

Statutory Inspection & Legionella Testing

- Heathrow is currently tendering and exploring the market for suppliers to deliver statutory inspection and legionella testing services
- The scope of the tender includes services across all terminals and airport areas, covering more than **10,000 assets**
- The estimated contract value is between **£1 million and £2 million**, with the opportunity expected to go live in **Q4 2025**.

Drainage and Gulley

- Heathrow is currently tendering and exploring the market for suppliers to deliver drainage and gulley maintenance services
- The scope of the tender includes services across all terminals and airport areas, and will be **essential part** of Heathrow's operation
- The estimated contract value is between **£1 million and £2 million**, with the opportunity expected to go live in **Q1 2026**.

RAIL MAINTENANCE : OPPORTUNITIES

CURRENT SITUATION

1. Our rail maintenance category needs a fresh injection of **innovation** and **strong drivers for improvement**
2. The category currently requires services including:
 - TVN maintenance
 - Site inspections and examinations
 - Maintenance services and support for control and communication technologies

OUR GOAL

1. Heathrow is looking to explore what the market has to offer
2. We are seeking suppliers who can provide innovative solutions that **enhance efficiency, reliability, and overall performance** within our rail category

OPPORTUNITY

1. The current annual spend for our rail maintenance category is approximately **£17 million**
2. This is a significant opportunity to partner with Heathrow and **deliver cost-effective, forward-thinking solutions across the rail category**

DE-ICING PRODUCTS: OPPORTUNITIES

Opportunity

- Heathrow mainly uses two providers for de-icing products
- Estimated £1.5M opportunity, review commencing in Q4 2025
- Stock levels we hold:
 - Ethylene glycol: 1.2m litres
 - Sodium acetate: 60-80 tonnes

Goal

- We are exploring the market to identify suppliers who can supply de-icing products and any other associated services proposed
- Drive value for Heathrow

**Type I AMS 1420
liquid de-icing
product**

**Sodium Acetate
solid de-icing
product**

**Type II AMS
1428 liquid de-
icing product**

**Ethylene Glycol
liquid de-icing
product**

**Type IV AMS
1428 liquid de-
icing product**

**Aviation Grade
Grit de-icing
product**

**Telemetry
Device and Tank
Monitoring
service**

**Sodium Chloride
based Marine
Grit product**



HEATHROW'S EVERYDAY VEHICLES



- Percentage Split of Leased vs Owned Vehicles: 45% lease (216) vs 55% owned (264)

- Percentage Split of EV vs HV: 30% EV (145); 56% HVO (266 – snow); 5% Hybrid (25); 9% Other (44)*

**Attachments to vehicles that don't run on fuel*

HEATHROW'S SPECIALIST VEHICLES



FLEET SUPPLY CHAIN: OPPORTUNITIES

Tyres

- 208 tyre jobs completed between Jan – Jul 2025.
- This is expected to double over a full year
- Leader Vehicles accounted for 95 of the 208 jobs (46%)

Third-Party Costs (incl. Tyres)

2023 - £66k (9% of annual spend)

2024 - £165k (25% of annual spend)

2025 - £100k (21% of first 6-months spend)

Breakdown

- Jump start / battery account for the majority of breakdowns
- Sweepers are used the most and carry out a heavy role. They are expensive to repair.

Breakdown & Defects

2023 - £135k (19% of annual spend)

2024 - £146k (22% of annual spend)

2025 - £128k (26% of first 6-months spend)

Bodywork

- 20 jobs in six months at a cost of £23,912 (this is body damage and other repairs)
- 2 big repairs – an engineering van @ £15k and a VIP vehicle @ £5.2k

Accident Damage (Parts & Labour)

2023 - £135k (19% of annual spend)

2024 - £94k (14% of annual spend)

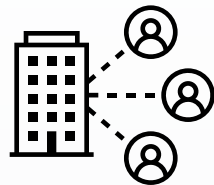
2025 - £75k (16% of first 6-months spend)

These opportunities will be advertised on Competefor

SPECIALIST ENGINEERING SERVICES: OPPORTUNITIES

Eastern Business Park Facilities Management

- Heathrow will in 2026 be looking at proposals from experienced and qualified facilities management firms to act as the FM provider for both soft and hard services at Eastern Business Park.
- The site will provide high quality accommodation to airport related occupiers
- Estimated contract value between £250k - £500k per annum.



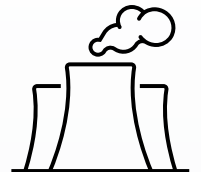
Chemical Water Sampling / Bacteria Management

- Heathrow will seek proposals from qualified environmental service providers to deliver chemical sampling and biological monitoring and treatment at various locations.
- The supplier will support compliance through routine and ad hoc sampling, emergency response, and reporting on water quality and aquatic health.
- The estimated contract value is between £250k - £400k per annum.



Air Quality Monitoring

- Heathrow will seek proposals from qualified suppliers to operate and maintain air quality monitoring stations and manage the associated data platform.
- The supplier will support compliance through equipment servicing, data reporting, and expert advice.
- The estimated contract value is around £60,000 - £100k per annum.



Rebecca
Mupita

Transdev Airport Services & CCH Aviation Logistics

TRANSDEV'S PURPOSE

“To empower the freedom to move every day thanks to safe, reliable, and innovative solutions that serve the common good.”



KEY FIGURES

TRANSDEV – A GLOBAL TRANSPORT LEADER

57,800
vehicles
operated

€93
billion
revenue

2,900
zero
emission
vehicles *

19
countries

12
million
passengers
per day

16
transportation
modes

102,000
team members



94%
jobs in
open-ended
contracts

THE HEATHROW SERVICES

- Landside passenger car park bussing
- Landside colleague car park bussing
- Management of the Central Bus Station
- Management of the Heathrow Group Travel Coaches
- Airside Interterminal buses
- Connections Heathrow Helpers
- Luggage trolley distribution
- Maintenance of the Heathrow Fleet





PROCUREMENT OPPORTUNITIES

- IT Helpdesk services provider
- Bus Fleet
- Leasing providers
- Agency providers
- Parts suppliers
- Bodywork suppliers
- Recovery services.



Mitie

Heathrow



mitie

1,000+

Employees at Heathrow



3000+ Customers



120,000

Work orders completed at Heathrow

32

Autonomous cleaning robots at Heathrow



Heathrow





The UK's leading facilities
management company



Mitie provides many operational infrastructure services
across the airport including:

Engineering & Technical

Building Fabric & Structural Services

Cleaning & Hygiene Services

Security Support Services

Facilities Management

Fire Safety & Compliance

Transport & Access Infrastructure

Data-driven Decision making

Opportunities

M&E Maintenance

Innovations

Dynamic Deployment

Engineering Projects

Pest Control

Data Driven Decision Making -
Hygiene Services

High Level Cleaning Solutions



Pira
Paskaramourthy

Vanderlande

VANDERLANDE

Heathrow



About Vanderlande

APS = 640 (UK)
WS = 192 (UK)

Established
in 1949



>9,000
employees

€2.4 billion
revenue



Warehousing



Many of the largest
global e-commerce
players and
retailers



- Amazon
- Lidl (part of Schwarz Gruppe)
- Albert Heijn (part of Ahold Delhaize)
- Zalando
- Walmart



Airports

>600 airports
12 of the world's top 20



- London Heathrow Airport
- Orlando International Airport
- Hong Kong International Airport
- Amsterdam Airport Schiphol
- Istanbul Airport



Global market leader



Innovative
systems



Intelligent
software



Life-cycle
services



Parcel

>52 million
parcels sorted
every day

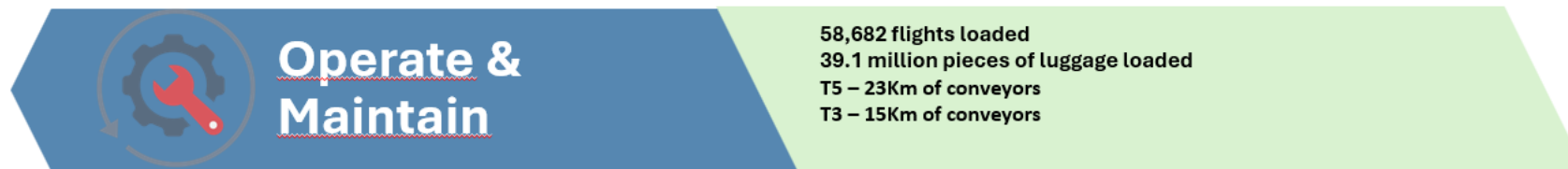


5 largest parcel
and postal
companies

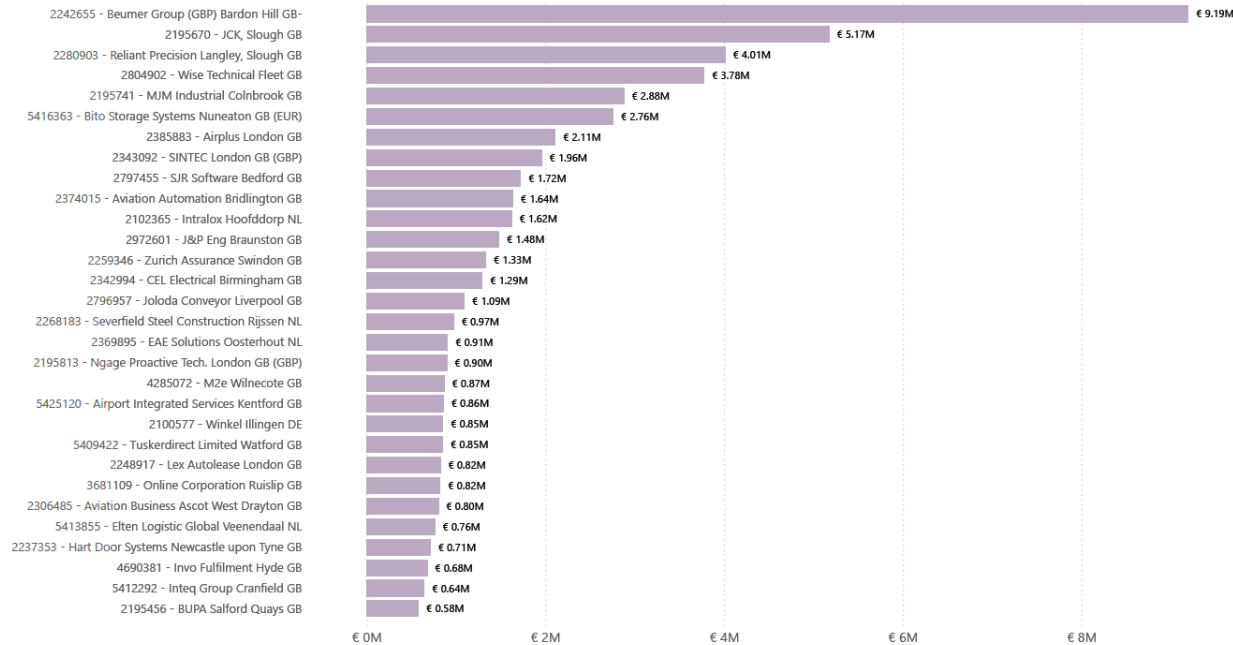
- UPS
- DHL
- FedEx
- SF Express
- DPD

Vanderlande at Heathrow

- Baggage Strategic Partnership Framework aimed at achieving Team Heathrow's Baggage mission of “every passenger, every bag, every time – fulfilling memories”.



Our works with SMEs



Spend profile:

- £66m spend on suppliers in FY25 as a UK entity
- Out of our top 20 spend suppliers 13 are SME.
- This equates to a spend of £24m with our top 13 SME.

Key Categories for SME:

- Mechanical & Electrical Installation
- Resources (M&E operatives, site, logistics etc.)
- Automation Controls (Equipment, design & implementation)

Anticipated Opportunities for 2026

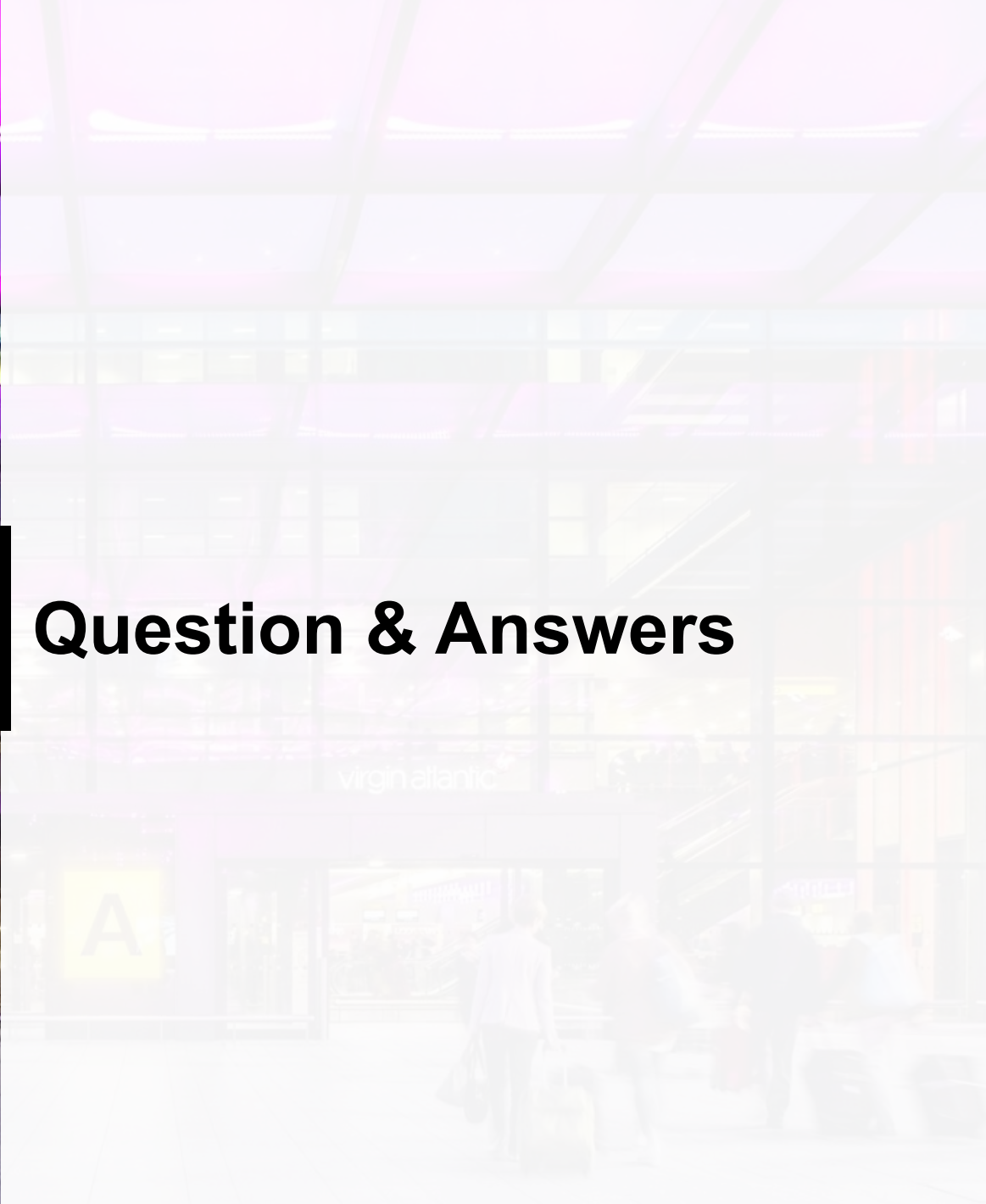
Category	Contract Opportunity	Description	Estimated Project Spend (if available)	Planned Engagement Window
M&E Installation	M&E Installation across various projects	equipment. Subcontractors should have experience installing complex mechanical and electrical equipment, ideally with controls based electrical installation. Subcontractors should have experience working to Heathrow Employer's	£2m+	Q2 2026
Site Operatives	Site operatives across various projects	Seeking site operatives to support running our project sites with tasks such as waste collection and movement, general site set up, tidy up, logistics etc. Operatives should have airside passes and compliant with HAL policies and work under the direction of our site team.	£300k	Q1 2026
Steelwork	Steelwork design, supply and installation across	Looking for turnkey steelwork design, supply and installation subcontractors with experience supplying Heathrow and their Employer's Requirements.	£100k	Q2 2026
Low Level Controls	Controls engineering resources and solutions across various projects	We are looking to expand our current supply base of subcontractors that are able to provide design and commission controls works. This could be providing qualified controls engineering resources to support our existing team or turnkey solutions.	£400k	Q1 2026

HAVE A QUESTION?





Question & Answers



Heathrow