

Estates, Facilities Management, and Corporate Services Market Intelligence Quarterly Report

December 2025



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Foreword

Between October and December 2025, the Estates, Facilities Management (FM), and Corporate Services sector has continued to respond to regulatory, market and strategic developments that will influence how leaders and procurement teams prioritise and deliver their services. A key focus this quarter has been embedding the 2025 NHS Premises Assurance Model (NHS PAM) into business-as-usual governance. In the future National teams will begin analysing the submitted PAM returns alongside Model Hospital and ERIC data, with early feedback indicating that PAM outcomes will increasingly inform external assurance, peer comparison and targeted support. CQC inspection teams are also starting to reference PAM evidence and trajectories more explicitly when testing estates safety, compliance and responsiveness.

In Q3 of FY 2025/26, operational resilience remains under the spotlight as allocations from the 2025–26 Estates Safety Fund are confirmed and schemes move into delivery. Trusts that have secured funding are now expected to demonstrate that projects are scoped, mobilised and governed in a way that delivers measurable risk reduction for critical infrastructure, especially in high-risk acute, maternity and mental health settings. There is a growing emphasis on evidencing how estates safety investments contribute to reducing clinical disruption, supporting elective recovery and improving patient and staff environments, with regional teams monitoring progress and slippage closely.

Market headwinds remain strong. Inflationary pressure has eased slightly but remains above historic norms in energy, construction and FM labour markets, while fragility in key supply chains and specialist contractor capacity continues to pose delivery and price risk. Trusts are being pushed to move from reactive cost management towards structured, lifecycle-based asset strategies, supported by better data, digital tools and smarter use of existing space. Net zero, decarbonisation and social value expectations are tightening, with new guidance and funding streams increasingly tying capital and FM spend to carbon reduction, local employment and community benefit outcomes. Procurement teams are being asked not only to comply but to evidence, through specifications and evaluation, how suppliers will help deliver these priorities.

The Procurement Act 2023, now in force for non-healthcare procurements, is starting to reshape processes and controls within Trusts and ICBs. Estates and FM procurements in particular will need to accommodate new obligations around social value, SME access and clearer contract management expectations, including the publication of KPIs on larger contracts. Governance teams are stressing the need for early planning and legal/procurement engagement to avoid challenge, ensure value for money and align with national procurement policy statements. Practice across the sector continues to move towards greater collaboration and standardisation. Shared service models, regional frameworks and joint procurements are increasingly used to secure capacity, manage risk and leverage economies of scale in hard FM, soft FM and corporate services. Updated Health Technical Memoranda (HTMs) and related guidance are being adopted as default baselines for design, construction and operation of healthcare facilities, helping Trusts demonstrate compliance and future-proofing in the face of changing models of care and technology.

Looking ahead from Q3, organisations that lean into these changes—using PAM as a live management tool, aligning capital and FM plans to safety and net zero funding, modernising procurement under the Procurement Act, and deepening collaboration—will be best placed to provide estates and facilities that are safe, resilient and sustainable for patients and staff in 2026 and beyond.

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UK Businesses Economic Outlook

Headline Indicators summary (Source: [House of Commons Library – Economic Indicators](#))

GDP is estimated to have grown by 0.1% in July to September 2025 compared to the previous three-month period (April to June 2025). Eurozone GDP grew by around 0.1% over the same period.

Services output was up by 1.4% in July to September 2025 compared to the previous year. Manufacturing and wider production output fell by 0.5% in Q3 FY 2025/26.

Productivity across the whole UK economy is estimated to have been broadly flat in Q3 FY 2025/26 compared with the previous quarter, and slightly lower than a year earlier, reflecting subdued output growth and easing hours worked.

CPI inflation was 3.2% in November 2025, down from 3.6% in October and 3.8% in September. Inflation in the Eurozone was close to 2.0% in late 2025, remaining around the European Central Bank's target.

The Bank of England's **Monetary Policy Committee (MPC)** cut interest rates by 0.25 percentage points to 3.75% in December 2025. Rates have been cut by 1.5 percentage points overall since August 2024.

Average **wages** excluding bonuses were around 4.7% higher in the three months to August 2025 compared with the year before, and roughly 1.0% to 1.2% higher after adjusting for inflation over the same period. CPI inflation for this period was around 3.7%.

Around 34 million people were in **employment** in July to September 2025, little changed on the year. The employment rate was just over 75%, while the unemployment rate remained close to 4.7% on the harmonised basis, indicating a softening but still relatively tight labour market.

The **value of sterling** was broadly stable over Q3 FY 2025/26, with only modest monthly movements. Compared with a year ago, it remains slightly higher on a trade-weighted basis.

The volume of **retail sales** was broadly flat in the three months to September 2025 compared with the previous three months, but around 1% higher than a year earlier, indicating weak but positive consumer spending in real terms.

The ONS (November 2025) reports that just over a fifth of trading businesses continued to see **increases in the prices** of goods or services bought in October 2025 compared with the previous month, while around 1 in 10 reported increasing the prices of goods or services sold; these trends have been broadly stable in recent months.

Around 1 in 10 trading businesses expect the **prices of goods or services** they sell to increase over the next month, broadly stable on earlier expectations; around a fifth of all trading businesses and over a third of those with 10 or more employees cite labour costs as a reason for considering raising their prices.

Around 1 in 5 businesses with 10 or more employees reported experiencing **worker shortages** in late 2025, a rate that has remained broadly unchanged since early in the year, suggesting ongoing recruitment and retention challenges in key sectors.

Estates, Facilities Management and Corporate Services Economic Outlook

UK Energy Prices – Insights and Forecast

The House of Commons Library and industry sources indicate that wholesale gas prices continued to ease through late 2025 while wholesale electricity prices remained relatively stable, with recent changes feeding into small movements in the cap for early 2026. For Q3 FY 2025/26, typical dual-fuel household bills under the Ofgem cap were £1,755, and from 1 January to 31 March 2026 this cap has inched up by around 0.2% to £1,758 per year for a typical household paying by Direct Debit. Unit electricity rates and standing charges have risen slightly, while gas unit rates have fallen marginally with a modest rise in gas standing charges, reflecting lower wholesale gas costs offset by network and policy charges.

Despite the fall in prices since the 2022 peak, average bills remain significantly above pre-crisis levels. Typical bills over winter 2025/26 are still materially higher than in winter 2021/22, and while the £3 per year increase from January 2026 is minimal in cash terms, it comes on top of already elevated costs for many households.

Charts 3.4.1 - 3.4.2: Prices of fuels purchased by non-domestic consumers in the United Kingdom

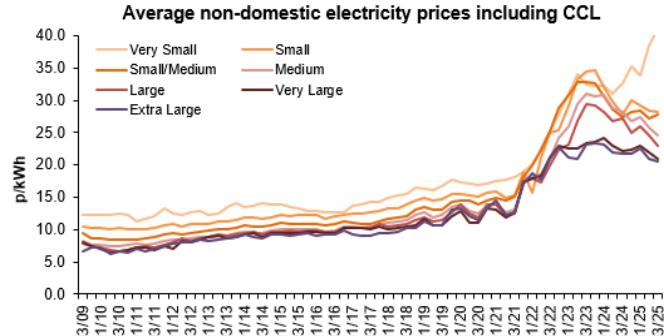
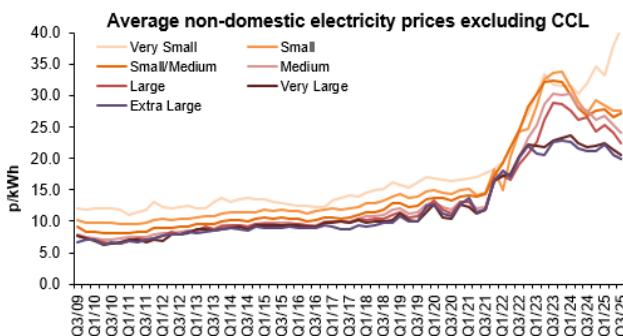
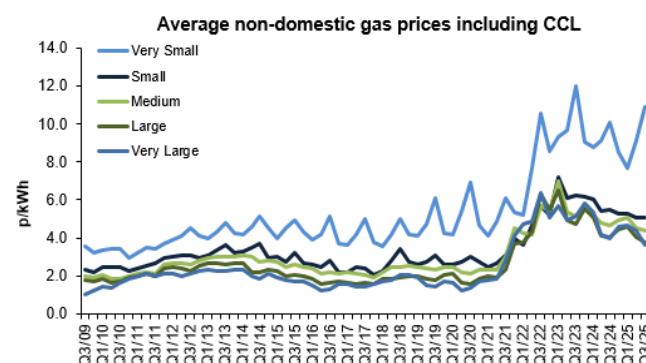
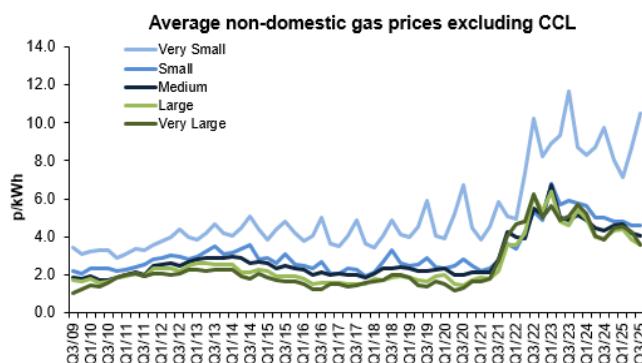


Fig. 1 Non-domestic Gas Prices - Department for Energy Security and Net Zero

From 1 January to 31 March 2026, the price cap means a typical household will pay about £1,758 a year, broadly flat compared with Q3 FY 2025/26 and around a quarter lower than the peak levels seen at the start of 2023. This equates to only a very small monthly increase compared with the previous quarter, but bills remain structurally high compared with historic norms and continue to put pressure on household budgets.

In real terms, once inflation is taken into account, current caps are slightly lower than the same period a year earlier, but the overall burden of energy costs is still substantial. Non-domestic users continue to face similar dynamics, with wholesale cost reductions partly offset by rising network and policy-related charges, keeping a strong focus on efficiency and risk management across the public sector and wider economy.

Cornwall Insight's latest forecasts, issued ahead of the January 2026 cap, suggested a modest fall in the Default Tariff Cap in early 2026 followed by a more noticeable drop from April, as wholesale prices ease and some policy costs are rebalanced. Their projection for April–June 2026 is around £1,620 for a typical dual-fuel household, which would be roughly 8% lower than the January–March 2026 level and the lowest since 2024.

While this trajectory points to gradual improvement over 2026, experts stress that bills will remain above pre-crisis levels for the foreseeable future, with network charges and residual policy costs playing a larger role in final prices as wholesale costs become a smaller share of the cap.

Estates, Facilities Management, and Corporate Services Market Overview

Facilities Management Market Overview

A report from Facilities & Estates Management Live highlights that, by the end of 2025, the facilities management industry continues to show strong resilience, adapting to economic uncertainty, hybrid work models and sustained cost pressures. FM services remain a major spend area for organisations, keeping demand high for value-driven, outcomes-focused workplace solutions. Outsourcing FM is still seen as a key lever for managing risk and future-proofing estates, particularly as organisations look to balance efficiency, ESG obligations and user experience in a stabilising but cautious market. This report explores the major drivers reshaping the FM industry and offers insights for organisations seeking to thrive in this evolving landscape. It focuses on three key areas: Digital, Physical and Human (Workplace PHD).



Digital

The integration of AI and automation into facilities management services has accelerated through Q3 FY 2025/26, with more organisations moving from pilots to live deployment. AI is now being used not just for fault detection but for dynamic optimisation and scenario planning, delivering measurable gains in operational efficiency, user comfort and carbon reduction. Smart FM solutions, including IoT sensors, BMS alarm analytics, HVAC optimisation, AI-enabled BIM and predictive maintenance, are increasingly linked to corporate data platforms so FM performance can be tied directly to business and workforce outcomes, helping justify investment and driving tangible cost savings.

Physical

Workplace strategy has continued to move beyond the simple question of hybrid working into a broader focus on experience, flexibility and asset performance. The emphasis is on creating human-centred, data-informed workplaces that support an “untethered workforce” with adaptable policies and spaces, while using utilisation, condition and performance data to inform strategic estate decisions. Cost and value for money remain the dominant drivers of FM purchasing decisions, but in Q3 FY 2025/26 there is a clearer link between cost, digitisation and ESG delivery: organisations that invest in smart, integrated FM and decarbonisation projects are seeing better long-term value. FM teams are under pressure to deliver savings on mature contracts while also enabling delivery of net zero and social value commitments, often through integrated service models and smarter supply-chain design.

Although wider fiscal and labour market pressures continue, the focus has shifted from one-off cost cutting towards sustainable efficiencies through energy reduction, backlog maintenance reduction and better asset life-cycle planning. National policy and capital guidance now provide greater medium-term certainty for estate investment and safety, which is helping organisations rebalance spend away from purely reactive maintenance and towards targeted energy efficiency, resilience and decarbonisation schemes supported by national funding and frameworks.

Human

The multigenerational workforce remains a defining theme, and by late 2025 workplace expectations are increasingly shaped by demands for flexibility, wellbeing, and purpose-driven employers. Workplace design and FM-led services are central to attracting and retaining talent, supporting collaboration and maintaining productivity in a hybrid context. FM leaders are expected to act as strategic partners to HR and IT, using data on occupancy, satisfaction and ESG performance to shape decisions about space, services and investment.

In Q3 FY 2025/26, works and maintenance services across health and public estates continue to be influenced by tightening sustainability requirements and multi-year capital and carbon plans. Procurement is more explicitly tied to both carbon and social value metrics, with estates teams using decarbonisation frameworks and green building standards to select suppliers and solutions. Capital and maintenance funding is moving onto longer-term, more transparent settlements, driving a shift from short-term reactive spend towards planned energy, infrastructure and heat-decarbonisation projects that support Greener NHS and wider net zero agendas. Estates teams are therefore

reassessing supplier portfolios, ownership models and on-site generation or treatment options, aiming to improve energy resilience, reduce lifetime costs and embed climate adaptation into estate strategies.

Estates Facilities Management related NHS LPP frameworks

- Total Facilities Management Framework - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/total-facilities-management-framework/>
- Works and Maintenance Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/works-and-maintenance-dynamic-purchasing-system/>

Waste Management Services Market Overview

The UK waste market remains valued at around £30 billion and is still projected to reach approximately £40 billion by 2028, with growth underpinned by tightening regulation, rising landfill costs and increased demand for circular solutions. The market continues to be shaped by a mix of large national operators, regional specialists and niche innovators, with technology, data and specialist capabilities key to differentiation. Consolidation has remained active through Q4 2025, with the top five providers retaining just over 20% market share, while a long tail of smaller operators continues to provide acquisition opportunities for growth-focused groups. These consolidators are increasingly aligning their business models to circular economy and ESG principles, investing in emissions tracking, advanced analytics and customer-centric digital platforms to secure competitive advantage and meet investor expectations.



Between October and December 2025, the waste services landscape has continued to evolve in response to March 2025 food waste legislation, which now requires most businesses with ten or more employees to segregate food waste and arrange separate collection by a licensed carrier. NHS providers have progressed from initial compliance activity to embedding circular economy practices into their longer-term waste strategies, focusing on reducing clinical waste volumes, increasing reuse and recycling, and procuring services via specialist sustainable waste frameworks. Carbon reduction plans, net zero alignment and social value are now standard expectations in waste tenders, and trusts are increasingly seeking partners who can provide detailed waste data, carbon reporting and behaviour-change support. Landfill tax, which rose sharply to £126.15 per tonne in April 2025, has continued to drive a strong financial

incentive away from landfill and towards recovery, reuse and advanced treatment solutions. To remain competitive, waste management companies are accelerating investment in compliance-enabling technologies, closed-loop recycling, and real-time emissions analytics, positioning themselves as strategic partners to enterprise customers and NHS organisations seeking both cost control and measurable environmental impact.

Waste Services related NHS LPP frameworks

- Waste Management Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/waste-management-services-dynamic-purchasing-system/>

Transport Services Market Overview

An Introspective Market Research report (March 2025) predicts substantial growth in the UK Ambulance and Non-Emergency Transport market with projections of £2.25 Billion by 2032, a Compound Annual Growth Rate of 8.23% from 2024 to 2032. One of the drivers for the growth is due to the rate at which people are requiring emergency services and also due to the high incidence of chronic diseases.

Apart from the increase in the standard of living leading to the development of health complications, there is a raise in the proportion of old persons thus, increasing the demand for effective and well-equipped ambulances. The operations of the public ambulances that are funded by the NHS continues to dominate the market while the opportunity for private players emerges to fill the gaps for the emergency and the non-emergency uses.



The public segment which is mainly consisted of the ambulance services which are under the operation of the NHS will continue to channel a major part of the market during the period of the forecast. These services are essential to the health-care system of the United Kingdom, as well as providing a funding by the Government for free emergency response and patient transport services. With existing constraints of inadequate resources and increasing cost of operation local public ambulance services remain ahead since they are readily available and depended on by the majority of the populace. Efforts to update the fleets of ambulances in the National Health Services along with other endeavours to increase the efficiency of the services make this segment invulnerable, with additional Q4 2025 investment going into electric vehicle infrastructure and low-emission fleets.

The market also gets a boost when there is new developments such as telemedicine, tracking system, and advanced moving intensive care unit. The continued investment on training people such as the paramedics and the emergency responders improve the industries capability of tackling essential health challenges effectively.

Between October and December 2025, the NHS and the wider public sector estates and procurement landscape have continued to see strong activity in Transport Services, with further growth in emergency and non-emergency demand and mounting pressure from handover delays, capacity constraints and rising acuity. This has reinforced the move towards more sustainable and digitally enabled transport models, including wider rollout of electric vehicles, optimisation of charging infrastructure and smarter scheduling tools, alongside tighter application of national eligibility criteria for non-emergency transport and greater use of alternative transport options for patients who are not clinically eligible.

Transport Services related NHS LPP frameworks

- Non-Emergency Transport and Other Transport Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/non-emergency-transport-and-other-transport-services-dynamic-purchasing-system/>

Corporate Services Market Overview

NHS Commissioning Support Unit Arden & GEM's recently surveyed clients through their Strategic Advisory Forum to gain a better understanding of the challenges faced across corporate services. Three common themes emerged from this research. Most seemed happy with their current corporate services but they understood the need for change and expressed an appetite to learn more on how they could improve both value and quality. Leaders within corporate functions suggested the biggest gains would probably come from embracing technology, with finance, HR, procurement and estates offering the greatest opportunities. Finally, many organisations were struggling to identify the improvements in shared services that could deliver the savings required while continuing to meet the needs of their system.

This work provides a valuable resource that NHS organisations can use to explore options for improvements across finance, payroll, procurement, HR and digital. With over £6bn spent by the NHS on corporate services in 2022, it is inevitable that all health systems will continue to seek efficiency gains from this important area of service delivery.

Between October and December 2025, corporate services are moving from planning to implementation as the new NHS operating model and payment reforms are firmed up for 2026–27, including the transition of NHS England functions into DHSC, deeper cost-reduction requirements for ICBs and providers, and a sharper focus on productivity and value for money. The 2025/26 NHS Payment Scheme continues to blend fixed system budgets with activity- and quality-linked components, and preparatory work is under way on best practice tariffs and revised urgent and emergency care payment models that will reward outcomes and patient experience rather than volume alone. As a

result, strategic planning for 2026 and beyond now expects corporate services to demonstrate clear, measurable contributions to efficiency, digital transformation and improved patient and staff experience, with greater transparency on performance and a stronger link between back-office innovation and frontline impact.

Corporate Services related NHS LPP frameworks

- Estates & Facilities Consultancy Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates,-facilities-corporate-services/estates-facilities-consultancy-servicesdynamic-purchasing-system/>
- Payroll Services - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/payroll-services-framework/>
- Analysis and Recovery Framework - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/analysis-and-recovery-framework/>
- CPC Drive – NPA framework offering electric only company cars

Sustainability - EFCS

Decarbonisation Funding

At the end of 2025 NHS England announced their latest round of decarbonisation funding focused on:

- Solar panels
- Battery storage
- EV chargers
- BMS systems
- LED lighting

This funding had a short window for expressions of interest and spend, with funding to be spent by the end of the FY. This follows a similar trend to last year's decarbonisation funding. There continues to be a broad funding gap since the closure of the Public Sector Decarbonisation Scheme (PSDS). There has been a shift from blanket grants to more specific and targeted funding interventions such as the latest NHS Decarbonisation Funding and the Great British Energy Solar Panel funding from last year.

Whilst we do not know whether there will be more notice for any potential funding in 26/27, we recommend:

- Be ready for funding with project plans
 - Ensure these comply with latest Net Zero Building Standards
- Build robust business cases
 - Consider lifecycle costs and benchmark cost and carbon savings
 - Heat Decarbonisation Plans and similar feasibility studies can support this



- Identify and apply for a variety of funding streams

Public Private Partnerships (PPPs) are on the horizon, which will leverage private funding further. Decarbonisation and Energy Efficiency are areas where this is expected to have a significant impact, with evidenced energy and cost savings from these investments.

NHS LPP can support planning through our [Estates & Facilities Consultancy Services Dynamic Purchasing System](#) and decarbonisation projects through our [Works and Maintenance Dynamic Purchasing System](#). Please contact gstt.lppefps1@nhs.net to learn more.

Government Buying Standards

Updated Government Buying Standards are due to be released in January to come into force in April. The categories covered are below

Procurement categories covered

Current Buying Standards	New Buying Standards
Office ICT Equipment	ICT Hardware Cloud and Data Centre Services Software & Applications AI
Construction Projects and buildings	Buildings
Electrical goods	Appliances
Water using products	
Furniture	Furniture
Textiles	Textiles
Paper	Paper
Transport	Fleet
Horticulture and Park services	Horticulture, Landscaping and Park services
Food and catering services	Out of scope
Cleaning products and services	To be archived

New Public Procurement Thresholds

Effective 1 January 2026, thresholds for almost all contract types have been decreased, only light touch regime contracts and contracts regulated by Welsh ministers have remained static. In combination with the general inflationary trends experienced over the last few years, this will mean more contracts will fall within scope of the main provisions of the procurement rules applicable to each contract.

The current thresholds (see below) remain effective for procurements started on or before 31 December 2025. Please note that these new thresholds will not apply to contracts regulated by Welsh ministers.

Type of Contract	Thresholds from 1 January 2026 (inclusive of VAT)	Current thresholds until 31 December 2025 (inclusive of VAT)
Goods and services to a central government authority	£135,018	£139,688
Goods and services to a sub-central government authority	£207,720	£214,904
Works contract	£5,193,000	£5,372,609
Concession contract (not a utilities contract)	£5,193,000	£5,372,609
Light Touch contract (that is not a concession contract or utilities contract)	£663,540	£663,540
Utilities contract (not light touch)	£415,440	£429,809
Utilities contract – light touch	£884,720	£884,720
Defence and security contract (that is not a works contract or concession contract)	£415,440	£429,809

Importantly, contracting authorities should remember that public procurement thresholds are inclusive of VAT, and authorities must estimate the value of a contract in accordance with Schedule 3 of the Procurement Act 2023. Schedule 3 includes various rules, but in essence the estimated contract value should be the maximum amount an authority could expect to pay under the contract (e.g., including any extensions and/or electing to take up options to supply additional goods, services or works, etc.).

Actions Suggested for Procurement Teams

Whilst on the surface the decrease in thresholds may appear minimal, contracting authorities should assess how this affects their pipeline and consider:

- assessing whether any below-threshold contracts routinely procured are likely to fall within the scope of the Procurement Act 2023 because of these changes.
- reviewing existing contracts where likely modifications will increase the contract value, as the new thresholds will likely create more “convertible” contracts.
- updating their internal procurement guidelines and financial thresholds to reflect these new values.

- updating relevant template documents and tools (e.g. contract value calculators, template PSQs, and/or template notices); and
- briefing teams on the new values – due to the reduction in the thresholds.

NHS LPP EFCS News

The NHS London Procurement Partnership EFCS team is re-procuring below agreements:

- Non-Emergency Patient Transport Services as a Framework Agreement under the Provider Selection Regime.
- Total Facilities Management as an Open Framework

These agreements will focus on quality & innovation, value, SME inclusion, sustainability and social value, offering members and the wider NHS an agreement to meet the changing needs of the NHS.

The procurement of these agreements, is directly aligned with both national and organisational strategies to modernise, integrate, and improve Estates, FM and Transport services.



NHS LPP Contacts

Should you wish to discuss any of the highlighted NHS LPP agreements, please feel free to contact the respective Category teams below

NHS LPP Agreement	Contact
Estates & Facilities Consultancy Services Dynamic Purchasing System	risha.mehta@nhs.net / nathan.jones17@nhs.net
Minor Works and Maintenance Dynamic Purchasing System	ashwaq.fraser2@nhs.net / remmy.kamya@nhs.net
Non-Emergency Transport and Other Transport Services Dynamic Purchasing System	ashwaq.fraser2@nhs.net / remmy.kamya@nhs.net
Total Facilities Management Framework	j.rumsey@nhs.net / remmy.kamya@nhs.net
Waste Management Services Dynamic Purchasing System	risha.mehta@nhs.net / nathan.jones17@nhs.net
Corporate Services (Professional Services)	nathan.jones17@nhs.net / nawaz.habib@nhs.net
Sustainability	Simon.Rowland7@nhs.net

Feedback

We would love to hear from you. If you have any suggestion on what you want to see in the next Quarterly report, please email: customer@lpp.nhs.uk

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