

BUSINESS INFORMATION MEETING

Terminal 3 North 2 Concourse Concession Opportunities

December 9, 2025



PHX DVT BYR

SUCCESS FOR TODAY'S MEETING

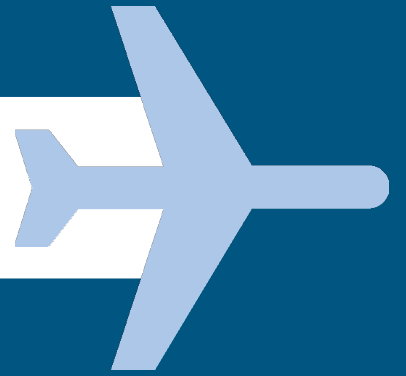
- Time for questions will be available at the end of the presentation. Please submit your questions using the “chat” feature.
- Better than a screenshot, today's presentation and recording will be available at:



*Everything is subject to change until the
Revenue Contract Solicitation (RCS) is released.*



AGENDA



- Terminal 3 North 2 Concourse (T3N2)
- Concession Opportunities
- Revenue Contract Solicitations (RCS) Details & Update
- Small Business Outreach Requirements
- Questions and Answers



TERMINAL 3 (T3)

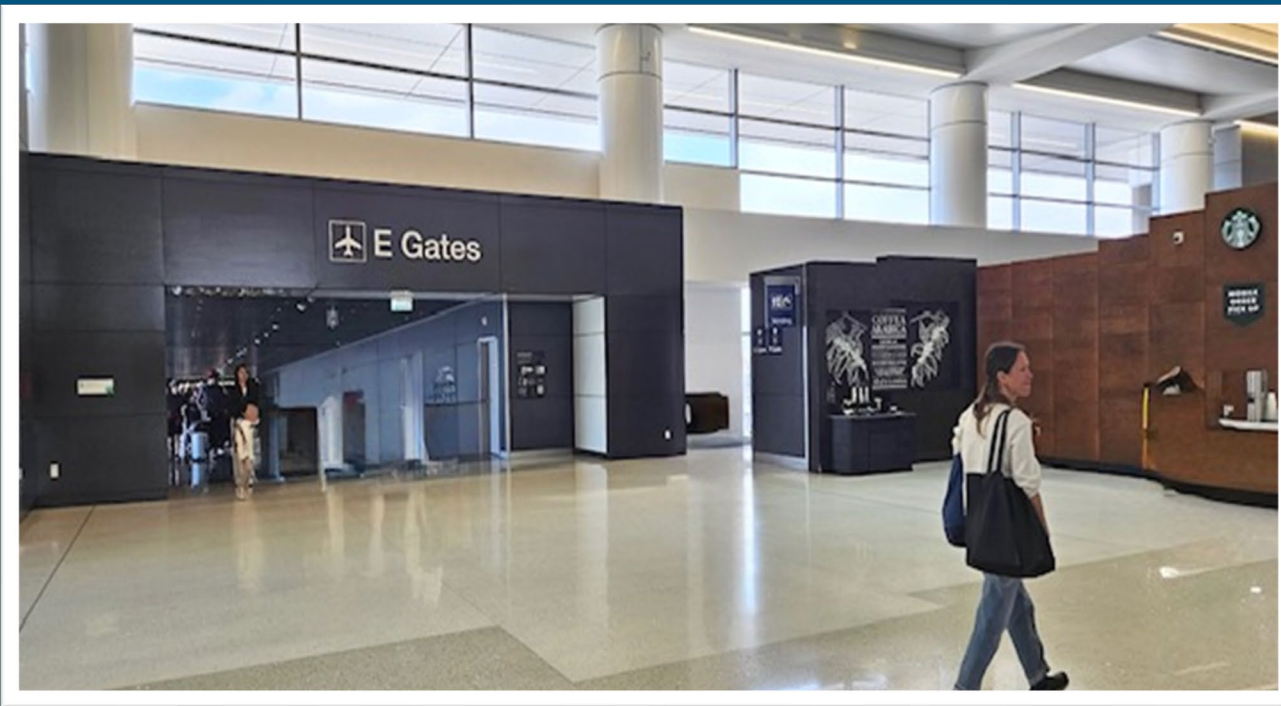
- ▶ Airlines
- ▶ Enplanement Numbers
- ▶ Concession Map

T3 AIRLINES

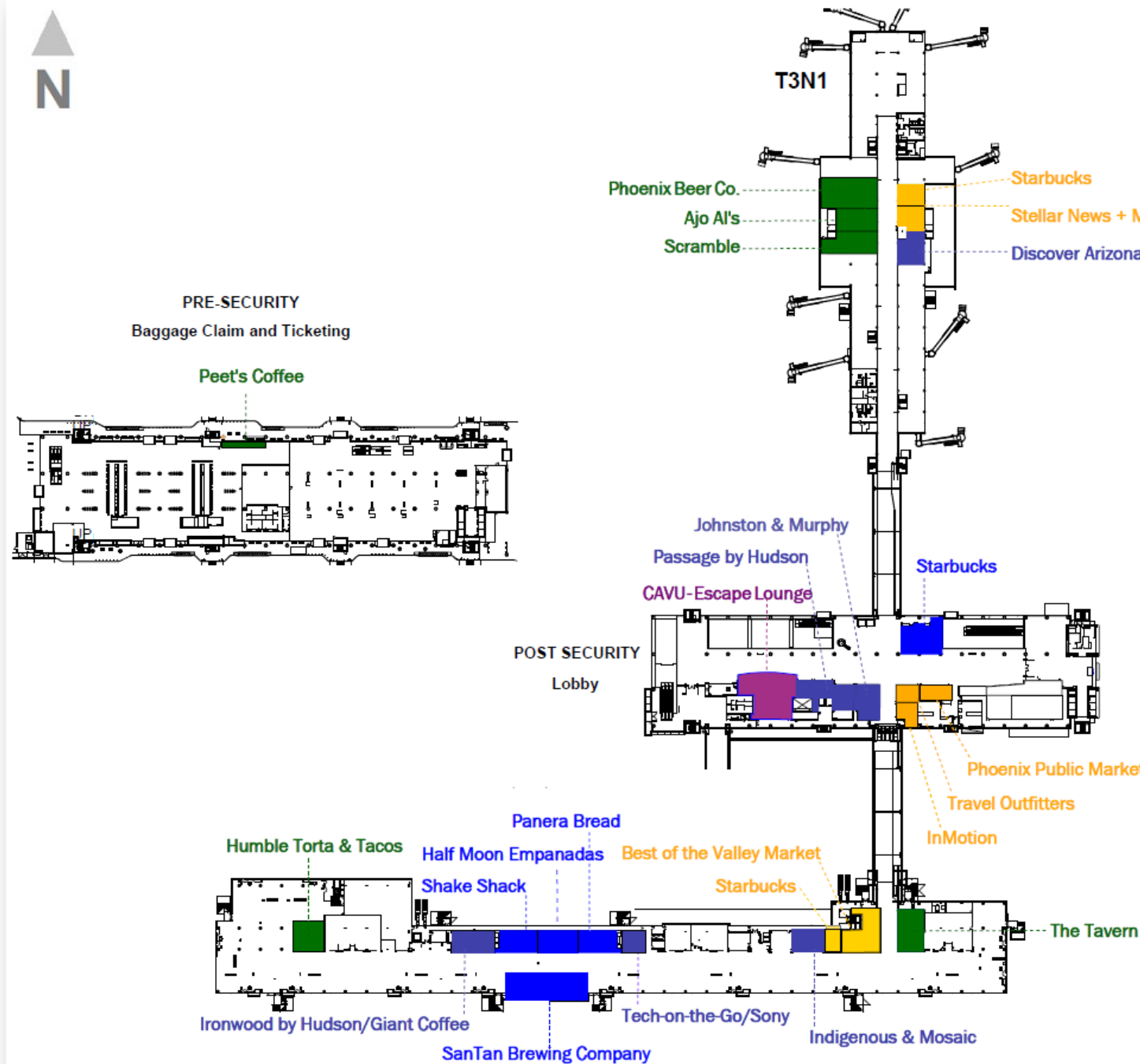
- Advanced Airlines
- Air Canada
- Alaska Airlines
- Allegiant Air
- Breeze Airways
- Delta Airlines
- Denver Air Connection
- Frontier Airlines
- Hawaiian Airlines
- jetBlue Airways
- Porter Airlines
- Southern Airways Express
- Spirit Airlines
- Sun Country
- United Airlines



TERMINAL 3 ENPLANEMENTS



- 2024: 6.5M
- 2023: 6.3M
- 2022: 5.1M
- 2021: 4.2M



- 13 F&B Units
- 11 Retail Units
- 1 Passenger Service Unit

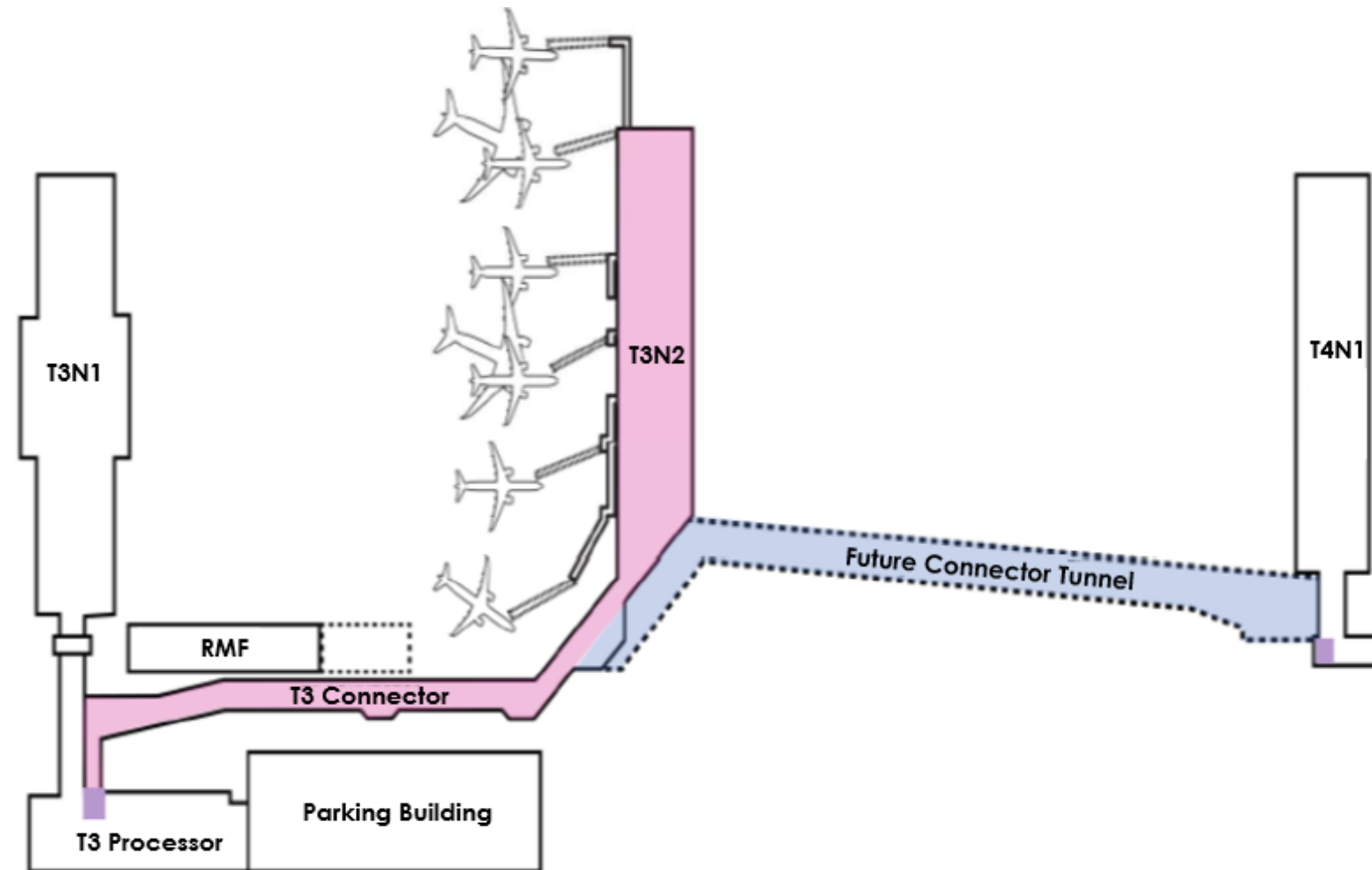
[Shops | Phoenix Sky Harbor International Airport](#)



*Preliminary Concepts

T3N2 Concessions Programming Objectives

- ✓ Meet the need for 1.5M passenger activity
- ✓ Timeline to coincide with concourse opening



T3N2 PROJECT OVERVIEW

- ✈ Six Gate Concourse
- ✈ Connectors to T3 and T4

DESIGN CONCEPT OF CONCOURSE



Airport's perspective is to reflect the natural beauty of Phoenix and the state of Arizona.

Tenant Design Criteria will be available when the RCS is posted.

UPCOMING REVENUE CONTRACT SOLICITATION

- Contracting Opportunities
- Business Terms
- Airport Concession Program Goals
- Sustainability Initiatives
- Helpful Hints
- Timelines



SOLICITATION GOALS

- Increase small business participation
- Optimize sales and rental revenues over the term of the Lease
- Provide high quality food & beverage and retail offerings
- Showcase food and beverage offerings that authentically reflect the local community's culinary heritage
- This solicitation opportunity will also include participation in the Aviation Department's sustainability initiatives, airport concession marketing, and customer experience programs



CONCESSION OPPORTUNITIES

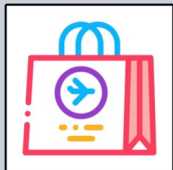


Food & Beverage Concession Packages

One full –service restaurant with bar (N2-FB4)

Two quick-serve restaurants and café bar (N2-FB1 & N2-FB2)

One coffee café designated for a small business operator (N2-F3)



Retail Concession Packages

One retail convenience, news, and gift store (N2-R1)

One specialty retail boutique-style store (N2-R2)

FOOD AND BEVERAGE PACKAGES

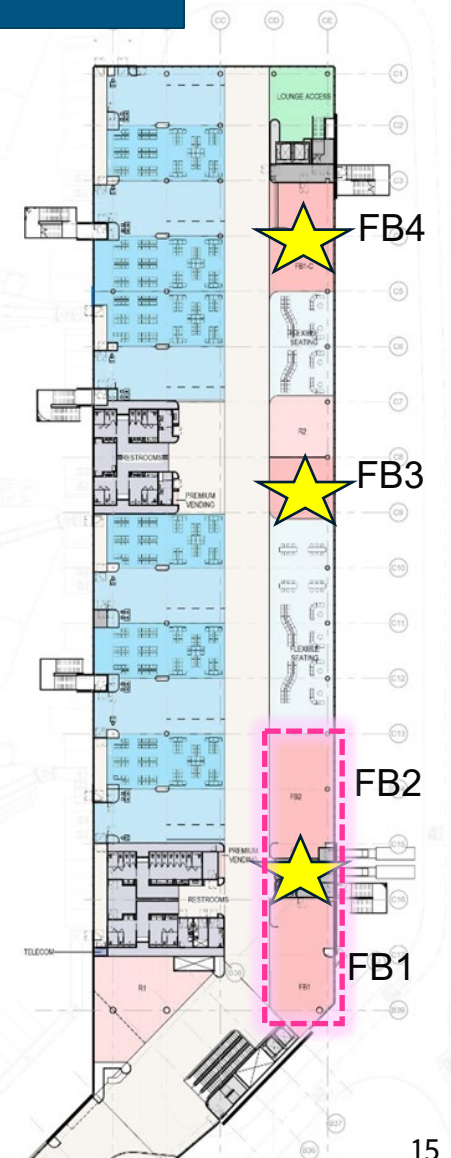
THREE (3) SEPARATE CONTRACTING OPPORTUNITIES



PROPOSED FOOD AND BEVERAGE



- One (1) Full-Service Restaurant with Bar (N2-FB4);
- One (1) Coffee Café Small Business Only (N2-FB3);
- Two (2) Quick-Serve Restaurants and Café Bar (N2-FB1& FB2)



*Preliminary Concepts and Square Footage is subject to change

FOOD AND BEVERAGE CATEGORIES

One Full-Service Restaurant with Bar (N2-FB4)

- Table service to customers and served by waitstaff. Restaurant will also have a bar for customers to order alcoholic and non-alcoholic beverages (with the proper liquor licenses).



Examples of F&B Categories Only

FOOD AND BEVERAGE CATEGORIES

One Coffee Café Small Business Opportunity (N2-FB3)

- Offers an array of coffee and tea selections and the menu items should include options for breakfast and lunch, including various bakery items and snacks.



Examples of F&B Categories Only



FOOD AND BEVERAGE CATEGORIES

Two Quick-Serve Restaurants and Café Bar (N2-FB1 and N2-FB2)

- The **quick-serve** units may offer counter service or self-service so the customer can pick up their order when the order is ready. Typically, these restaurants cater to faster-paced clientele.
- The **café bar** will offer a full complement of alcoholic beverages in a themed environment. The café bar is expected to offer full or limited food service and serve appetizers, small plates, breakfast items, etc.



Examples of F&B Categories Only



Food and Beverage Proposed Business Terms

- ▶ Contract Term:
 - ▶ Between 12 -15 years
- ▶ Financial Impact / Rent:
 - ▶ Percentage of Gross Sales
 - ▶ Percentage range will depend on the concession category
 - ▶ Percentage will be finalized upon RCS posting



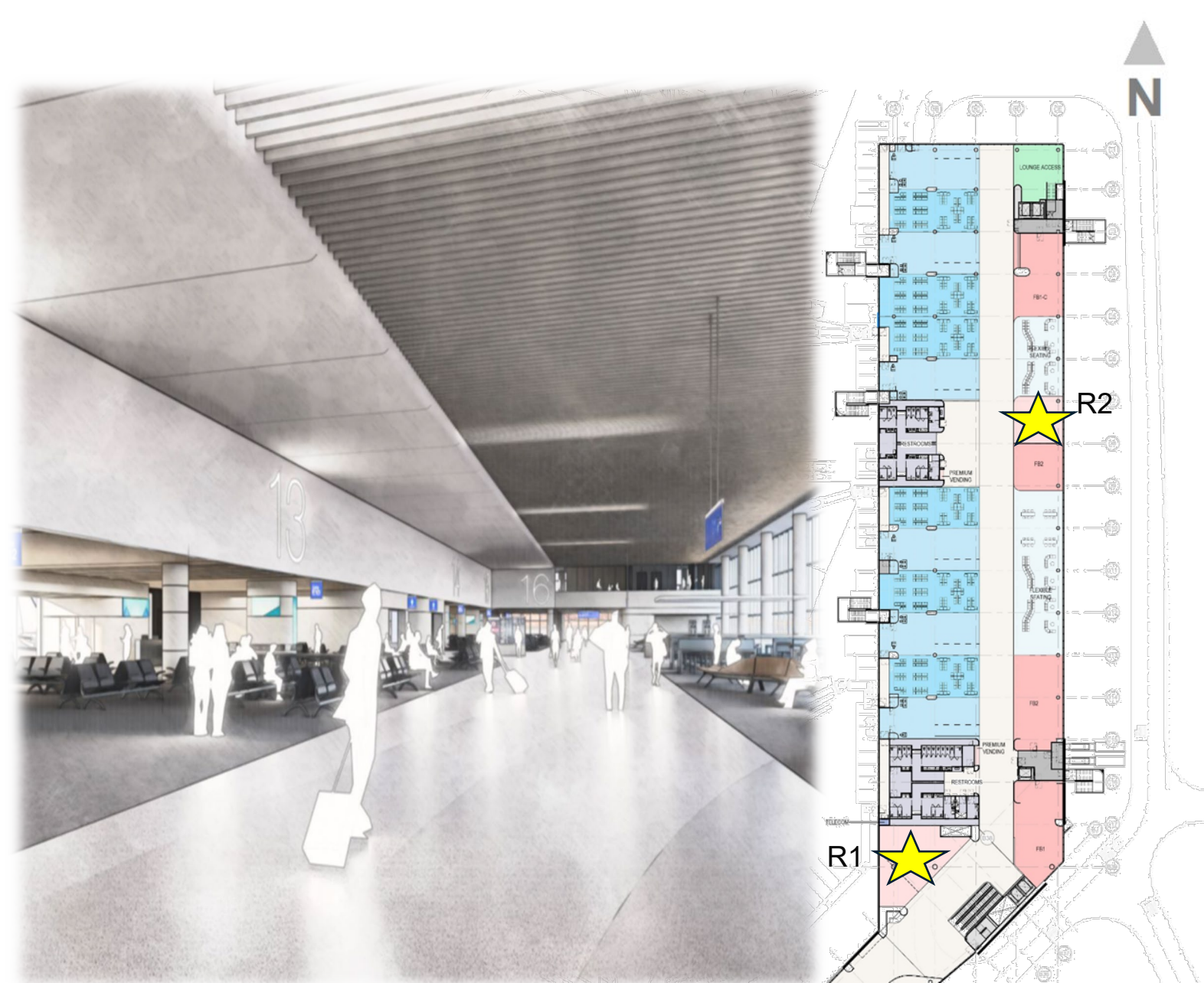
RETAIL PACKAGES

TWO (2) SEPARATE CONTRACTING OPPORTUNITIES



PROPOSED RETAIL CONCESSIONS REVISED DEC 2025

- One (1) News, Gift & Convenience, Store (N2-**R1**);
- One (1) Specialty Boutique-Style Store (N2-**R2**)



*Preliminary Concepts and Square Footage is subject to change

RETAIL CONCESSION CATEGORIES

One Retail News, Gift, and Convenience Store (N2-R1)

- Offers essential merchandise that passengers can purchase quickly and efficiently with touchless and contactless check-out capabilities.



Examples of Retail Categories Only

RETAIL CONCESSION CATEGORIES

One Specialty Retail Boutique-Style Store (N2-R2)

- This boutique-style concept is a retail arrangement where a variety of brands and products can be featured in dedicated areas of the store. Proposers should be creative and make the shopping experience more convenient and enjoyable allowing brands to shine in the concession space.



Examples of Retail Categories Only

Retail

Proposed Business Terms

- ▶ Contract Term:
 - ▶ Between 10 -12 years
- ▶ Financial Impact / Rent:
 - ▶ Percentage of Gross Sales
 - ▶ Percentage range will depend on the concession category
 - ▶ Percentage will be finalized upon RCS posting



SOLICITATION DETAILS



Evaluation Criteria

**Proposed
Concept(s) and
Menu /
Merchandise Plan**

**Tenant Design &
Quality of the
Premise**

**Management,
Marketing,
Operations,
Technology Plans**

**Experience &
Qualifications**

**Business
Revenue Plan**

SUSTAINABILITY & GREEN BUSINESS PARTNERS

The program encourages participants to implement sustainable practices.

- Energy efficiency measures
- Waste reduction strategies
- Responsible sourcing practices
- Water conservation efforts



REVISED TIMELINE

Solicitation Issue Date: February 2026

Pre-Response Meeting: Spring 2026

Proposal Due Date: TBD 2026

City Council Award: TBD Late 2026

All RCS dates are subject to change



Helpful Hints about the Solicitation Process

Read

Entire solicitation document including the concession lease agreements and exhibits.

Attend

Pre-Response meeting

Monitor questions & submittal deadline

Addenda

Review all addenda and all Q&As for changes and new information

Proposal Response

Your Proposal must be Responsive and in City-approved submittal format

**On-Time Submission*

**Page-Limitation*

**Organize information by Tabs, etc.*

TERMINAL 3 NORTH 2 CONCOURSE

**RESPONSE
LIMITATION**



RESPONSE LIMITATION

Respondents may submit only one (1) Response per Package for this RCS.
Multiple Responses are prohibited.

The following shall be deemed Multiple Responses.

- The City receives more than one (1) Response for a Package from a Respondent.
- The City receives one (1) Response from a Respondent and one (1) or more Responses for a Package from any entity or person affiliated with the Respondent.

If Multiple Responses for any single package are received from a Respondent, all Responses from that Respondent shall be deemed non-responsive and rejected.



EVENTS & RESOURCES

Sarah Moratto
Small Business Engagement Manager



Terminal 3 North 2 Concourse Concession Opportunities Outreach Events

Summer Business Information Meetings

- April 21, May 9, and June 9 ✓

Matchmaking Event

- May 9 ✓

Added Business Information Meetings

- Dec. 9 at 8 a.m. ✓
- Coming Up - Dec. 16 at 6 p.m.



ADDED BUSINESS INFORMATION MEETING #1

Date: Tuesday, Dec. 9, 2025
Time: 8 - 9 a.m.
Where: Hybrid - At Aviation Headquarters or Via WebEx

[REGISTER NOW](#) ➤

See details and register at QR code



ADDED BUSINESS INFORMATION MEETING #2

Date: Tuesday, Dec. 16, 2025
Time: 6 - 7 p.m.
Where: Hybrid - At Aviation Headquarters or Via WebEx

[REGISTER NOW](#) ➤

See details and register at QR code



Join our Aviation Department Interest Email List

Instructions

Email: busopps.aviation@phoenix.gov

Include the following information:

- Company Name
- Email address (for notification)
- Identify interested business area(s)
i.e., Retail, Food & Beverage, Ground
Transportation

RESOURCES

Aviation Outreach Events



Aviation Business Website



SMALL BUSINESS OUTREACH REQUIREMENTS



SMALL BUSINESS OUTREACH REQUIREMENTS

On October 3, 2025, U.S. Department of Transportation (USDOT) issued an Interim Final Rule (IFR). The IFR removes the race- and sex-based presumptions of social and economic discrimination, requiring all applicants to individually establish eligibility based on social and/or economic disadvantage.



SMALL BUSINESS OUTREACH REQUIREMENTS

In accordance with regulations of the US Dept. of Transportation, 49 Code of Federal Regulations (CFR) Parts 23 and 26:

- Airport Concessions Disadvantaged Business Enterprise- Neutral (ACDBE-N) Program
- Small Business Element focused
 - Any small business that meets eligibility requirements* is eligible to participate

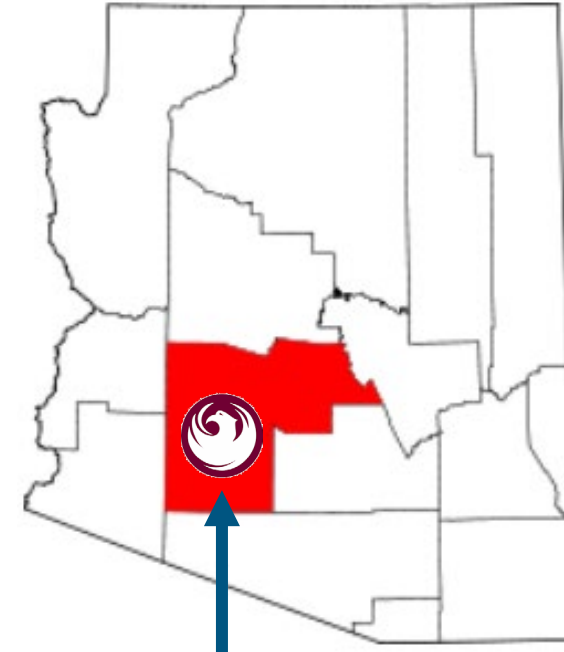
* Eligibility will be established through a verification process



IFR IMPACTS - CERTIFICATION

- **Presumptions Removed:** The IFR eliminates automatic presumptions of social and economic disadvantage based on race or gender. **All applicants** must now individually prove **disadvantage**.
- **Recertification:** All DBE/ACDBE firms must undergo re-evaluation, including submission of personal narratives and financial documentation (PNW), to become “recertified”.

The AZUCP (City of Phoenix, City of Tucson, and ADOT) will be conducting the re-evaluation process for all firms certified in AZ.



The City of Phoenix is the **only** certifying agency for ACDBEs in the state of Arizona.



SMALL BUSINESS OUTREACH COMMITMENT

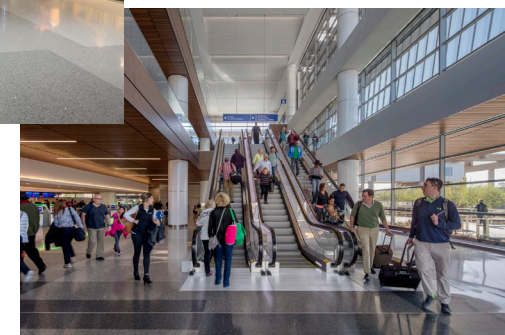
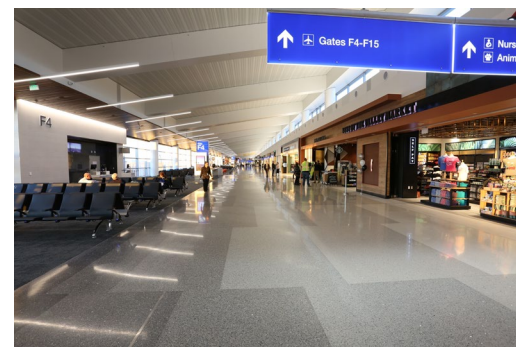
Phoenix Sky Harbor International Airport will utilize:

- ✈ ACDBE-Neutral measures to achieve Small Business Participation.
- ✈ A national market for small business participation.



SMALL BUSINESS OUTREACH REMINDERS

- As part of the Outreach Requirement, all Respondents must conduct outreach to small businesses.
- Besides food and beverage or retail providers, other opportunities to consider could include:
 - Suppliers of products
 - Suppliers of goods and services
 - Uniform services
 - Janitorial services

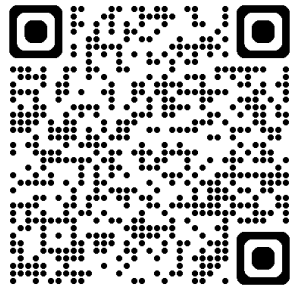
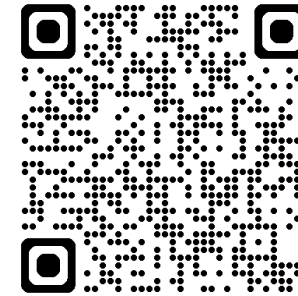


SMALL BUSINESS RESOURCES

Small Business Directories

Arizona Transportation Business Portal (AZ UTRACS)

<https://utracs.azdot.gov/search>



City of Phoenix Certification & Compliance System

<https://phoenix.diversitycompliance.com>

Each Respondent's outreach efforts are not restricted to companies registered with the City!



Creating an inclusive & equitable environment where everyone is valued.

WHAT IS A SMALL BUSINESS (13 CFR Part 121)

The City defines a small business as any business:

- Whose annual gross income does not exceed the Small Business Administration's (SBA) size standards.
- That owners do not exceed the Personal Net Worth cap of \$2.047 Million (per 2024 Final Rule).



SMALL BUSINESS VERIFICATION

Verification of Small Business Status will be performed by the City of Phoenix Equal Opportunity Department.



SMALL BUSINESS OUTREACH REQUIREMENTS

All Respondents **MUST** fulfill the outreach requirements:

- Failure to provide documentation of required outreach efforts at submission = **REJECTED RESPONSE**
- Outreach efforts to small businesses must be demonstrated by submitting required documentation:
 - Forms E01-200; EO2-200 and supporting documentation – due at time of bid;
 - Form E03-200 – due prior to award of contract.

All forms will be made available when the solicitation is released.

If a Respondent is a:

- **Small business**, the Respondent **MUST** conduct outreach to other small businesses.
- **Joint Venture (JV)**, the Respondent **MUST** conduct outreach to other small businesses that are not already a partner of the JV.

REMEMBER: You must complete outreach requirements
even if you are a Small Business.

YOU CANNOT OUTREACH TO YOURSELF!



SMALL BUSINESS OUTREACH REQUIREMENTS

Steps to take for Outreach:

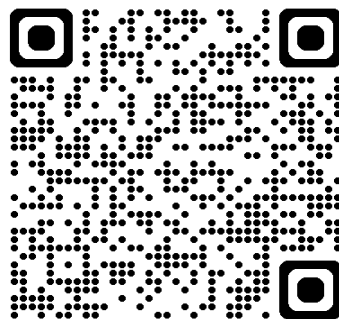
1. Identify opportunities for small business participation
2. Conduct outreach for small business participation
3. Evaluate small business participation
4. Tell each small business that responded to the outreach efforts of their selection decision whether or not the small business was selected

DOCUMENT!!! DOCUMENT!!! DOCUMENT!!!



SMALL BUSINESS PARTICIPATION REQUIREMENTS

All Successful Respondents must fulfill ACDBE – Neutral Program Requirements, and shall comply with the Airport’s ACDBE – Neutral Program Plan and 49 CFR Parts 23 and 26



EOD SMALL BUSINESS SUPPORT CONTACTS

For additional information, please contact the Equal Opportunity Department - Business Relations Division

Certification Team: 602-262-6790

Via email: brd.certification@phoenix.gov



Compliance Team: 602-495-0887

Via email: brd.compliance@phoenix.gov



Have More Questions? Contact Us

busopps.aviation@phoenix.gov



Next BIM Date

☐ Tuesday, Dec. 16, 2025 at 6:00PM



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QUESTIONS?

Please enter any questions you have into the chat box.



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