LONDONASSEMBLY

Appendix 1
Regeneration Committee

The Regeneration Game

Stadium-led regeneration

March 2015

Regeneration Committee Members

Gareth Bacon (Chairman)	Conservative
Navin Shah (Deputy Chair)	Labour
James Cleverly	Conservative
Len Duvall	Labour
Murad Qureshi	Labour

The Regeneration Committee

The Regeneration Committee is tasked with monitoring and reviewing the Mayor's regeneration functions and spending decisions. This includes oversight of the London Legacy Development Corporation (LLDC), the Mayor's powers through the London Plan, which are being used to promote particular areas for regeneration, and the Mayor's regeneration funds.

In 2014/15, the Committee's work programme has included stadium-led regeneration, the LLDC, the Royal Docks, Smithfield Market, and regeneration funding.

Further information about the Committee's work is available on the GLA website: www.london.gov.uk

Contact

Jo Sloman
email: jo.sloman@london.gov.uk
Tel: 020 7983 4942

Cover photo: View of Wembley Stadium taken on the Committee's site visit on 8 July 2014 (London Assembly)

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Chairman's foreword

The vivid memories of football fans are an especially poignant nostalgia. They fill countless pages in newspaper articles and on websites, they have become the basis for plays and books and films. And despite the fairly ordinary matter they relate to – that of seeing a football match – they reach into all aspects of human existence including sibling rivalry and parental bonding, rites of passage, and the nature of belonging.

As we are all well aware, football, at least at the top end, is a global business netting billions of pounds through TV rights and other commercial spin-offs. Yet ticket revenues and other match-day income provide an income stream which anchors the clubs' financial positions. The stadium sits at the heart of this entertainment offer; it is a field of dreams, the stadium of light that draws the fans to the spectacle. Stadia can contain flashes of artistic brilliance (the Art Deco east stand at Highbury was Grade II listed), or memorials to battles from a bygone age (Liverpool is not the only club with a stand named after the 1900 Battle of Spion Kop), or to sporting legends or club heroes (one thinks of the Bobby Moore or the Sir Alex Ferguson stands). But the stadium also sits within a local community that may actively support the club or begrudge and despair of the Saturday parking restrictions, the packed match day buses and trains, the noisy crowds, the over-excited fans.

With a spate of football clubs looking to redevelopment to boost their financial strength, our report reviews the role of the football stadium in leading inner city regeneration. If football clubs, as many claim, are at the heart of their communities, how will new stadia benefit local people as well as club shareholders? Clearly, there is a balance to be struck between the costs and benefits of a new or redeveloped stadium to its owners, and the local community and businesses. The Mayor and local authorities are inevitably involved and the public purse will undoubtedly be used to support the re-development in some way – so what's the deal for the local community? Our review brings together evidence from six months of site visits and discussions with London clubs (and elsewhere) to set out for the first time how local communities should benefit from such developments and what the Mayor can do to ensure they do.

Gareth Bacon AM

Regeneration Committee Chairman

Executive summary

Stadium-led regeneration is capturing headlines as a model to rejuvenate neighbourhoods. It can give underused brownfield sites renewed purpose, bringing substantial physical improvements to historically neglected areas. And although the hard evidence for a positive economic impact is still lacking, the arrival of a well-known club, or the expansion of an existing stadium, can change people's views of the area, increasing local pride and encouraging newcomers to set up homes and businesses.

Effective regeneration cannot, however, be just about physical improvements. The development of a new or expanded stadium as an anchor tenant presents a unique opportunity to support wider economic development in an area. In contrast to a purely residential-led regeneration programme, for example, a stadium has potential to attract new visitors, injecting vibrancy to an area. Yet our review shows that partners have not always fully exploited opportunities to put new stadium locations 'on the map.'

If place-making is to happen, lessons from east Manchester, Wembley and The Emirates make it clear that new stadia must not occupy large land areas – attracting growing match day crowds and swelling shareholder profits – at the expense of the communities that host them. Feedback to our local survey shows that communities are not always opposed to stadium development. However, effective early involvement and consultation is necessary to broker stronger relations between clubs and communities.

Football clubs have a responsibility to ensure that the local community gains from a new stadium. Communities must benefit from new mixed tenure housing, and improved transport links and connections across the area. Local authorities must also capitalise on opportunities to guarantee that clubs and other incoming businesses prioritise the local workforce when sourcing new employees.

Building in these features will shift stadium-led regeneration proposals from producing limited local effects, to supporting strategic impact across the London Plan policies. That is why the Mayor should support our Stadium Charter and push for the planning framework to treat stadium applications as strategic developments.

1. What is stadium-led regeneration?

'Curiously I have no idea of the score, nor the precise year, but the journey and the location on the terrace are indelibly etched on my memory, as it was always the same.

We'd take the 161 bus to Woolwich and get off on the common. Walk across the common and down past the church, through the park, with the deer, through the back streets and eventually the turnstile and into the Valley (home to Charlton Athletic FC). We always stood on the enormous bank, far enough away to see, but not close enough to catch the ball if it went out.

The ground has changed, the 161 no longer stops on that side of the common, but the rest is like going through a time warp. I now live abroad, but every time I go back I try and get to a match as South London supporters are unique.'[1]

Stadium-led regeneration has emerged as a model of development to support both the expansion of football stadia and the regeneration of brownfield sites.

1.1. Stadium-led regeneration – where a football stadium development is used to catalyse regeneration in a local area – has emerged as a model of regeneration in the last 15 years. While the majority of sports stadia lie in semi-urban or out-of-town areas, research by KPMG points to a growing proportion of new stadia in city centre locations across Europe since 1980.[2]

1.2. London is home to a small number of completed stadium-led regeneration schemes. Arsenal FC's development of the Emirates Stadium is perhaps the best-known, alongside Wembley Stadium. Outside London, the City of Manchester (now Etihad) Stadium is another example of stadium-led regeneration. Because of the significant levels of public

[1] Reflections of a football supporter: The Guardian, 26 January 2011, Share your first-match football memories (comments p. 2, jhopgood)

[2] KPMG (2013) *A Blueprint for Successful Stadium Development*

sector investment in Manchester's 2002 Commonwealth Games venue, we have examined lessons from this development in our investigation.

1.3. Several stadium-led regeneration projects are on London's horizon. Most imminently, public interest continues to mount ahead of the Olympic Stadium reopening, while it undergoes major transformation to become a permanent new home for West Ham United FC (WHUFC). A stream of other football clubs have announced plans to develop new grounds, including both Tottenham Hotspur FC (THFC), and Queen's Park Rangers FC (QPR), in Tottenham and at Old Oak Common respectively. Fulham FC has planning permission to extend its Riverside Stand,[3] and reports suggest Chelsea FC is considering options for expansion[4] at its current ground.[5]

1.4. All these building projects sit within a context of larger ambitions to deliver physical, economic and social regeneration for their local communities. Over the course of our investigation, we visited six of the largest completed or proposed stadium-led regeneration schemes, and the table and Map 1 in **Appendix 1** show some of the regeneration impacts these have delivered or propose to deliver. These clubs' actual or proposed development timeframes and a handful of smaller clubs' plans mean that London could see several new stadium-led regeneration developments over the next decade.

1.5. Football club owners looking to build new premises have themselves led and financed schemes in most of the examples we have examined. However, the taxpayer – alongside sports associations, and The Lottery, for example – funds stadium schemes for national sporting events and so have funded all or the majority of the City of Manchester (now Etihad) Stadium, Wembley Stadium, and the Olympic Stadium. In legacy mode (or to supplement their core function, in the case of Wembley Stadium), the public bodies responsible for building these stadia may develop leasehold agreements with football clubs and other interested parties. In all cases, however, public sector organisations have an important role to play, granting planning permission, and investing in transport, social infrastructure or public realm improvements around a stadium.

[3] http://www.fulhamfc.com/stadium-development/design-concept

[4] Architects Journal, *Herzog & de Meuron working on plans for Chelsea FC*, 5 January 2015

[5] Our investigation has focussed on a number of major football club developments in the Premier League and Championship, however, we are aware that other clubs – both large and smaller – have active proposals for new stadia, or are considering redevelopment.

1.6. Both private and public-funded scenarios create an important debate about the extent to which major football stadium development can deliver regeneration for local communities when commercial gain – and hoped-for enhanced club performance – is the initial imperative. They also raise questions about the public subsidy necessary to maximise public benefit.

1.7. We set out to understand why there is a growing trend for football clubs to link their stadium expansion plans to neighbourhood regeneration. We wanted to know what clubs, local councils and communities expect from a new stadium, and how the Mayor could ensure that stadium-led regeneration meets his objectives in the London Plan to support better outcomes for local communities. The stakeholders we met in person and who have written to the Committee tell us that there are clear lessons for football clubs, local authorities, and associated partners involved in designing the stadium-led regeneration schemes now coming on-stream. **Appendix 4** sets out the methodology for our investigation.

2. What difference can a stadium make?

Summary

The benefits from new stadium schemes will accrue differently to a range of partners and stakeholders. For football clubs, a new stadium offers opportunities for increased revenue and greater financial stability. Local authorities can use stadium-led regeneration schemes to help meet their objectives for local renewal; upgrading the physical environment and delivering social outcomes. A new stadium can also provide increased facilities for community activity, and the chance to co-locate community outreach activities improving the quality and life chances for local people. But the enhanced regeneration effects of stadia over other developments are as yet unproven, therefore public bodies need to work hard to maximise the benefits and manage the risks.

'We need to move to a new stadium to thrive and to survive long term in any kind of Premier League level or even Championship level.' – Mark Donnelly, QPR FC

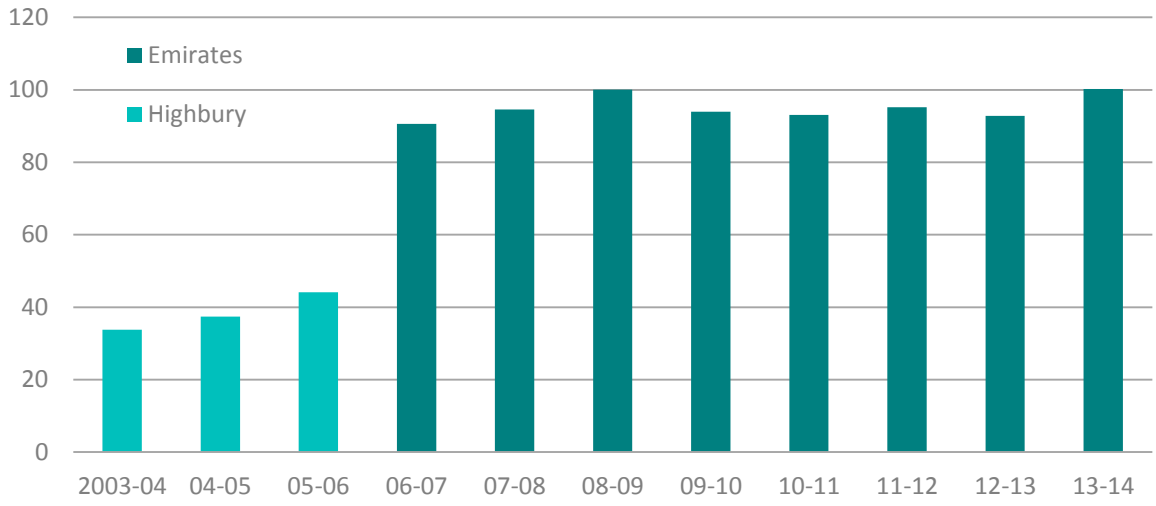
Football clubs gain financially from a new stadium

2.1. A new or larger stadium can generate significant financial returns for a football club, improving both its short-term income and long-term performance.[6] Larger stadia can lead to increased match day revenue for clubs. For example, since moving to the Emirates Stadium in 2006, Arsenal FC's annual match day revenue has almost tripled from £33.8 million in 2004, to £100.2 million in 2014, as shown in Chart 1:

[6] KPMG (2013) *A Blueprint for Successful Stadium Development*

Chart 1: Arsenal FC gate and other match day revenue, £ millions

Source: Arsenal Holdings PLC, Statement of Accounts and Annual Report (2004-05 to 2013-14)



2.2. The evidence is clear that new stadia act as revenue raisers for clubs. Brentford FC told us that it estimated the operational impact of its proposed new stadium at Lionel Road to be worth £3 million a year. The club has based its expectations on evidence from past development programmes showing that clubs expanding their premises see their average attendance rise by 60 per cent.[7] If this holds true, other clubs such as West Ham United FC and Tottenham Hotspur FC should see their (planned) new stadia filled to capacity at an average match.[8]

2.3. Development around the stadium is also used to boost club finances. For example, Millwall FC (MFC) told us that it would like to develop some of the land around the stadium. MFC said that The Den is underused and incurs annual losses, and a stake in new adjacent development, such as a hotel, would improve the club's viability. The club is unable to do so, however, as it does not have freehold ownership of the land.[9] This

[7] Summary of visit to Brentford FC on 15 July 2014, p. 1

[8] Applying the same level of increase to West Ham United FC and Tottenham Hotspur FC would see both clubs' average attendance rise to around 55,000, based on average attendance of 34,720 at WHUFC matches in 2012/13 (http://www.whufc.com/articles/20130524/hammers-fans-set-attendance-record_2236884_3189783), and 34,808 at THFC matches in 2013/14 (http://stadiumdb.com/news/2014/08/10_ranking_here_are_the_best_european_clubs_by_attendance)

[9] Developer Renewal has secured planning permission for a development in the Surrey Canal Triangle area around Millwall FC (MFC)'s stadium, The Den. The programme will include a new indoor regional sports centre, 2,400 new homes, and a new Overground station, among other developments. Written submission from Surrey Canal Renewal, p. 1

highlights the importance of land ownership for clubs, without which they may have limited means to generate non-football revenue.

2.4. In the long term, increased match day revenue can fund larger investment in players. And clubs expect their increased spending power to produce better results and performance in the Premiership and in Europe (or promotion for clubs in lower leagues), leading to even more revenue from TV rights and other commercial sources.

The enhanced regeneration effects of stadia over other developments are as yet unproven

2.5. Clearly, the football industry is a key contributor to the national economy. However, at the local level, there is limited hard evidence about the actual impact of stadium-led regeneration in the UK. The available evidence paints an equivocal picture about the unique contribution that they can bring to an area. When making choices about whether to grant planning permission or commit public funds, local agencies therefore need to bear in mind that:

- Some of the activity may have happened anyway – that is, the benefits may not be truly 'additional'. This can apply both to football clubs' charitable work, and to the job creation which interested parties may expect to flow. So, for example, WHUFC and THFC told us that they expected to expand their community work as part of their moves to new stadia. But others, for example, Mark Panton[10] and the businesses at our Islington focus group, said there is evidence that some of this activity would have happened without a new stadium, and that clubs could still do more to invest in the local area.

- Currently, the evidence is inconclusive regarding whether stadia have a 'halo' effect compared with regeneration schemes based on other land uses (for example, housing or employment). A body of research on stadium development in the United States shows there is no statistically significant economic difference from stadium schemes compared to other forms of development.[11] Urban economist Gabriel Ahlfeldt explained that while studies can often identify local impacts, *'we fail empirically to detect these effects at the level of a city or a region,'* and *'the statistical tools that we have*

[10] Written submission from Mark Panton, p. 7
[11] Written submission from Mark Panton, p. 9

available are not precise enough to get to these relatively small impacts.'[12]

- It can be difficult to isolate the impact of a stadium from other factors influencing regeneration in an area. Although sports events and stadia may produce stronger economic effects on house prices than local wages, experts suggest this may be as a result of *'improvements to local amenities rather than to the local economy.'*[13]

2.6. All these factors make it difficult to assess the extent to which a new or expanded stadium affects the local economy. Questions about the unique economic impact of a stadium matter most when public bodies face choices about how to regenerate an area. Only in a minority of cases (such as Old Oak Common) may a stadium be one of several options for development. A local authority's desire to retain a football club in the local area, or a lack of suitable alternative sites, may limit where a new stadium can be located. In all scenarios, however, it is incumbent on the public sector to maximise the benefits from such schemes and minimise the risks.

2.7. Greater transparency will be key to understanding what stadium-led regeneration schemes can deliver and who pays for it. Londoners – local authorities, stakeholders and local residents and businesses – deserve to know how a new or expanded stadium is going to affect the area. We need to know what football clubs contribute to wider regeneration, including the extent to which their section 106 agreements are fulfilled. Clubs rely on support and financial cooperation from local authorities to deliver associated connectivity improvements. Furthermore, we know that football clubs use their community foundations to deliver social programmes, but they also receive some of their funding through local authority and health commissioning.[14]

Maximising the regeneration benefits of stadia

2.8. Our evidence points to several ways that a new stadium can support regeneration. These relate to the effect stadia can have on the

[12] Gabriel Ahlfeldt, Regeneration Committee 19 June 2014, transcript p. 2

[13] What Works Centre for Local Economic Growth (May 2014) *Evidence Review 3 – Sports and Culture*, p. 26

[14] For example, we heard that West Ham United Community Sports Trust delivers much of its work through match funding from partners (Summary of visit to WHUFC on 2 September 2014, p. 2), and Brentford FC delivers educational support for schools, which was previously supported by government funding and schools now buy in (Summary of visit to Brentford FC on 15 July 2014, p. 4)

attractiveness or branding of an area, and more concrete benefits like employment and housing.

Catalytic effects

2.9. We have heard strong and recurrent claims about the catalytic effects that stadia can have on local communities. Several groups argue that stadium-led schemes bring glamour and increased footfall to an area.

2.10. Well-planned stadia can act as 'anchors', whereby local businesses follow a major football tenant.[15] The Olympic Stadium is part of a bigger vision for the regeneration of east London after London 2012. Nearby, for example, the LLDC is working with development partners to create a hub for businesses in the technology, digital and creative sectors, at Here East. It is also working with UCL, the V&A Museum, Sadlers Wells and others to develop a cultural and educational hub in the south of the Olympic Park.

Place-shaping

2.11. In this way, stadia will also be 'place-shapers.' A majority of the schemes we examined – such as the Olympic Stadium, Manchester City FC, Tottenham Hotspur FC and a proposed stadium at Old Oak Common – have been (or are being) designed as significant new visitor destinations. The LLDC hopes West Ham United FC will bring regular additional footfall to the area, supporting the local businesses in Hackney Wick and Stratford Town Centre.[16] Dr Paul Brickell acknowledged the challenge the LLDC will face in encouraging footfall at the Olympic Park on non-match days throughout the year:

> *'We have yet to see how the South Park keeps its numbers up during the cold days of winter, however there will always be people going to watch West Ham at the weekend.'*[17]

2.12. Stadium schemes are likely to involve large amounts of land but football is not the only game in town. Commenting on the area around Millwall FC's stadium, Lewisham Council told us that:

> *'by improving physical access to the site [the Surrey Canal Triangle area] and providing a mix of place making elements it is envisaged that footfall through the site will increase significantly'*.[18]

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[15] Written submission from Mark Panton, p. 7
[16] Dr Paul Brickell, Regeneration Committee 16 September 2014, transcript p. 6
[17] Dr Paul Brickell, Regeneration Committee 16 September 2014, transcript p. 6
[18] Written submission from LB Lewisham, p. 2

2.13. Local planning authorities therefore have a duty to ensure that they maximise assets around a stadium to deliver public benefit.

Employment

2.14. As large local employers, football clubs have significant opportunities to create new jobs to directly benefit local communities. For example, Arsenal FC employs nearly 3,000 people at The Emirates on match days.[19] At Old Oak Common, QPR FC has estimated that a new *'stadium and its immediately associated development would create a large amount of employment (2,000-3,000 jobs) quite quickly.'*[20] WHUFC expects to create 720 jobs at the Olympic Stadium, and the club has a target for 75 per cent of these roles to go to local people living in Newham.[21]

'We also set ourselves high targets of local employment, which was 70 per cent as a minimum, and we are achieving year-on-year about 72-74 per cent.' – Pete Bradshaw, MCFC

2.15. Football clubs can use their local profile to improve access to employment for the long-term unemployed and residents living in deprived areas. We visited Arsenal FC's learning centre, which the club built as part of its section 106 development agreement with Islington Council. Serving residents of three neighbouring boroughs, the centre provides skills-based courses alongside CV writing and interviewing skills, and tutors encourage participants to apply for jobs at the stadium.

Housing

2.16. The clubs and local authorities we met on our site visits were also keen to highlight the scope for new or redeveloped stadia to deliver new housing. Living next to a stadium is increasingly desirable for some, and it attracts a price premium. Commenting on The Emirates, Sarah Ebanja explained:

> *'I think what we know is that, anecdotally, and as you can see yourself, some people want to be around that space - obviously there are people who do not like football at all - but it is an attractor and it is viewed as sexy. People wanted to move there.'*[22]

2.17. As well as providing new accommodation, residential development helps football clubs to part-fund new stadium construction. For example:

- Arsenal FC converted the club's former Highbury ground into 655 apartments, the most expensive of which sold for approximately £1 million;[23]

[19] Ken Friar, Regeneration Committee 19 June 2014, transcript p. 5
[20] Written submission from QPR FC, p. 1
[21] Written submission from the LLDC, p. 4
[22] Sarah Ebanja, Regeneration Committee 19 June 2014, transcript p. 13
[23] Summary of visit to Arsenal FC on 15 July 2014, p. 2

- THFC plans to develop 222 new homes near its stadium at Brook House (through Newlon Housing);[24]

- Brentford FC has partnered with developer Wilmott Dixon to build 910 homes around its new stadium. The club also plans to build around 100 family housing units at Griffin Park;[25]

- Development partner Galliard Group has recently submitted plans to develop WHUFC's current Boleyn Ground into 838 homes (over two-thirds of which will be one or two-bed units).[26] The homes will be part of a mixed residential and commercial development;[27] and

- QPR told us it had an ambition to lead on delivery of the 24,000 new homes the GLA envisages in the Vision for Old Oak Common.[28]

2.18. Some of the completed schemes we examined made a valuable contribution to local affordable housing. In its section 106 agreement with Arsenal FC, for example, Islington Council secured almost 50 per cent affordable housing, across approximately 3,000 new or refurbished homes delivered through the scheme.[29] Around Wembley Stadium, 45 per cent of the first phase of housing by developer Quintain is affordable, along with 70 per cent planned in the second phase.[30]

Enhancing opportunities to benefit local communities

2.19. The evidence also warns of a number of risks, and the measures clubs and local authorities could take to reduce them.

Supporting local businesses

2.20. Not everyone may welcome new economic development around a new or expanded stadium. Some community groups argued that big business interests – both football clubs themselves and the chains they may attract – will squeeze out local, independent businesses. Tottenham Business Group explained the concerns of some local traders:

[24] THFC site visit presentation to the Committee, 8 July 2015
[25] Summary of visit to Brentford FC on 15 July 2014, p. 2
[26] Planning schedule accessed at https://pa.newham.gov.uk/online-applications/applicationDetails.do?activeTab=summary&keyVal=NG3ZV5JY5F400 on 6 March 2015
[27] Summary of visit to West Ham United FC on 2 September 2014, p. 3
[28] Mark Donnelly, Regeneration Committee 16 September 2014, transcript p. 11
[29] Summary of visit to Arsenal FC on 15 July 2014, p. 1-2
[30] Summary of visit to Wembley Stadium on 8 July 2014

'The majority of businesses are freeholders often living above their premises. We have been given no other recourse but to go [...] The High Street shops are derided as low value businesses, yet the 'chicken shop' run by one of the local businessmen is one of the most popular eateries on the High Road.'[31]

2.21. Local authorities can work with football clubs to ensure that this does not happen and that locally-owned businesses benefit from stadium-led regeneration. Speaking to some traders near The Emirates, we heard that few had benefitted from any stadium 'spill over' effects. In their view, food and beverage outlets in the stadium's immediate vicinity had gained most. Transport changes, such as removing ticket barriers at Finsbury Park – while a safe and useful adaptation for match days – increased problems such as drug dealing and black market trading the rest of the time, which could have a negative effect on businesses trying to trade all week.

Local people must benefit from new employment

2.22. Football clubs have a clear opportunity to address concerns around low-wage jobs. This is especially important when considering stadium-led regeneration because, as Mark Panton highlighted, *'[stadium-led] regeneration schemes might bias local development towards low-wage jobs related jobs'*.[32] The Premier League recently announced the value of its TV rights had risen by 70 per cent, yet media reports suggest that none of its clubs – except Chelsea FC – pay their employees the Living Wage.[33] The LLDC reassured us that long-term operational jobs will be delivered at the Olympic Stadium: for example, security, stewards, catering, ticket sales. We welcome the agreement the E20 partnership will have with the future stadium operator, requiring the operator to use Newham Council's employment brokerage service (Workplace), and to pay staff the London Living Wage.[34] London's Premier League clubs should take the opportunity to show leadership by committing to paying their staff the London Living Wage.

2.23. Clearly, local authorities have a key role too. They can help local people access the jobs created as a result of a new stadium development. We heard that Islington Council worked with Arsenal FC, the local Chamber of Commerce, local colleges and the local community to improve local

[31] Written submission from Tottenham Business Group, p. 1
[32] Written submission from Mark Panton, p. 6
[33] Evening Standard, 11 February 2015, *Premier League boss Richard Scudamore under fire over minimum wage paid to stadium staff*
[34] Written submission from the LLDC, p. 4

residents' access to new employment opportunities at The Emirates. Manchester City FC (MCFC) told the Committee that it works with a local university and college to determine which training courses will equip people with the skills required to access new jobs at the Etihad stadium.[35]

'It is just as incumbent on the local authority, the voluntary sector, and other public sector bodies […] to ensure that they are doing whatever they can to prepare individuals to be able to take those opportunities.' – Sarah Ebanja

2.24. In our view, future stadium-led regeneration programmes should maximise employment pathway and apprenticeship schemes. WHUFC runs a very positive scheme where apprentices enrolled on its *Leadership Through Sport* programme study accountancy qualifications and receive support to access to jobs in Canary Wharf. At Old Oak Common, we expect the OPDC to honour its commitment to consider employment targets in the letting of contracts, and agreements with employers to employ local people.[36]

Housing at the right price and tenure mix

2.25. We saw signs that future stadium-led regeneration schemes are not on track to achieve the good levels of affordable housing in previous schemes. Affordable housing is important if new accommodation is to be within the reach of existing communities. Brentford FC has secured an exemption from Hounslow Council from including affordable housing among the 910 units it plans to build. We heard that the club has gained this exemption on the grounds of the site's predetermined viability.[37] However, Brentford FC will have to include affordable housing in the third of three building phases, if developer Wilmott Dixon has achieved a certain level of profit in the first two stages of development.[38] At the Boleyn Ground, WHUFC's development partner Galliard's proposal for new housing includes six per cent affordable housing.[39]

2.26. In another example, a local community group, Our Tottenham, claims that Haringey Council has watered down affordable housing targets around THFC's proposed new stadium:

> *'The local authority acknowledges the major need for new affordable homes in Haringey, but scrapped the requirement for 50 per cent of 200 flats in the southern development to be*

[35] Pete Bradshaw, Regeneration Committee 19 June 2014, transcript p. 34
[36] Letter from Victoria Hills to the Chairman, 19 November 2014
[37] Summary of visit to Brentford FC on 15 July 2014
[38] Summary of visit to Brentford FC on 15 July 2014
[39] The Guardian, 24 February 2015, Local residents angry at lack of social housing at West Ham's ground

affordable homes while allowing THFC to increase the number of new homes to 285'.[40]

'There is no provision for affordable housing or for suitable amenities such as medical care or education.' – Survey respondent commenting on Brentford

2.27. Stadium-led regeneration schemes should support the Mayor's housing targets, including his objectives for affordable housing. We welcome the fact that these schemes can support the construction of new housing where it is desperately needed. And we recognise that sometimes compromises need to be struck between viability and a balanced housing offer. However, tenure mix and who lives around a new stadium is important because the Mayor's strategic objective is to deliver mixed and balanced communities.[41]

Accelerate the development of new infrastructure

2.28. Creating a new destination is a strategic, complex and long-term task. In Manchester, while MCFC have been tenants of the (now) Etihad Stadium since 2003, there remains a significant task ahead to make east Manchester a destination in its own right. On our visit, we heard that the area had only recently received a connection to the tram network, despite plans to develop the link before the 2002 Commonwealth Games. Pete Bradshaw told us:

> *'The next phase has to be how do we do something that actually attracts people 365 days a year into east Manchester to create the footfall, to create the viability of spend and continuous spend, and make it a day-in, day-out destination venue in its own right.'*[42]

Conclusion

2.29. While there is a lack of firm data about the economic impact of a stadium, our evidence indicates that stadium-led regeneration schemes can act as a catalyst for physical and social regeneration. They can make sites attractive to new business and residential entrants and create new jobs and opportunities.

2.30. Clubs must take steps to ensure that stadium schemes enhance quality of life for existing residents, however. Perhaps tellingly, only 10 per cent of our survey respondents thought that existing residents would gain 'a lot' of benefits from a new stadium. For example, 70 per cent of our survey respondents felt that a redeveloped stadium would have a negative impact on local parking, and 64 per cent thought it would create more noise. Residents around Brentford FC expressed particular concerns that

[40] Written submission from Our Tottenham, p. 10
[41] London Plan Policy 3.9
[42] Pete Bradshaw, Regeneration Committee 19 June 2014, transcript p. 9

the new stadium would lead to gridlock in an already congested area and more parking problems for local people. Furthermore, high rise housing – a feature of many stadium-led development schemes – could have a negative impact on local groups. Some survey respondents in the Brentford area observed that the new tall residential towers Brentford FC proposes building will change the local skyline and negatively affect residents' views of the river, for example.

'There is clearly also a need for greater involvement of communities and stakeholders at all levels if sports is to be used successfully in urban regeneration schemes.' – written submission from Mark Panton

2.31. Clubs and local authorities risk missing out on delivering a genuine regeneration benefit to existing local communities, if they do not take an inclusive and transparent approach in the planning and design stages. Among respondents to our survey, just 29 and 25 per cent of respondents were satisfied with consultation by the football club and local authority respectively (on issues related to stadium development). Michelle Moore explained how deeper links between clubs and local communities can be mutually beneficial, observing that a 'true community football club' would invest in:

> *'Really good consultation, and they will be looking at how they can involve those supporters and those fans in the running of that club in some way. Then you would build real social capital. You would build a real legacy and loyalty with that community.'*[43]

2.32. Clubs may not always know best how local communities want to use new stadia facilities but they need to take the time to consult. Pete Bradshaw explained that MCFC had designed a community use agreement enabling local groups to use the Etihad Stadium for meetings and events, but it had to revise its approach substantially following low uptake.[44] Clubs risk disengagement if they present their stadium development proposals and community use plans to local groups with little scope for communities to say at an early stage what local facilities they want. They can make some quick wins, by, for example, offering subsidised rates for hiring space at the club, as business owners at our Islington focus group suggested.

2.33. We know that the LLDC has created a park panel – enabling local groups to have a say on the area's physical development and future neighbourhoods – and a Youth Panel.[45] Given the profile of the stadium and the scope for community benefit, the E20 Stadium Partnership could set aside a position on the E20 Stadium Partnership board for a member of the park panel. We welcome the Mayor's commitment for community

[43] Michelle Moore, Regeneration Committee 19 June 2014, transcript, p. 25
[44] Pete Bradshaw, Regeneration Committee 19 June 2014, transcript p. 24
[45] Paul Brickell, Regeneration Committee 16 September 2014, transcript p. 27

representatives (representing residents and businesses) to sit on the new OPDC board.[46] It is not too late for the E20 Stadium Partnership to adopt the same approach.

2.34. To maximise the benefits to local communities we call on the Mayor to endorse our charter for stadium-led regeneration. This brings together a set of practical measures clubs and stadium operators need to observe in drawing up their redevelopment plans. Stadium developments can have strategic impact on local communities, areas outside the host borough, and London Plan policies. We want to see this charter embedded in the London Plan so that developers, club owners and planning authorities have to have regard to it.

Recommendation 1

In the next iteration of the London Plan, the Mayor should incorporate a Charter for stadium developments as part of amendments to the Plan. In the intervening period, the Mayor should have regard to the Charter when reviewing stadium planning applications.

Local authorities should have regard to the stadium Charter in their Local Plans.

[46] MD 1421, *Designation of Old Oak and Park Royal Mayoral Development Area and Corporation*, p. 4. The Committee heard about the GLA's plan to facilitate community involvement in the new Mayoral Development Corporation at Old Oak Common. Aspects of this approach could be used to support community involvement in publicly-funded stadia.

Charter for effective stadium-led regeneration

Football clubs and relevant local authorities seeking to develop a stadium-led regeneration scheme should commit to:

- A clear vision and policies for place-making around the new (or expanded) stadium, including public transport connectivity and permeability between the stadium and surrounding area.
- Undertake a skills mapping exercise to assess local capacity to take advantage of new jobs. The results should inform a skills and employment strategy, including measures to prepare and upskill local communities in order that they can access the new jobs.
- Pay the London Living Wage to all stadium employees.
- Support the Mayor's housing targets in all stadium-led regeneration schemes, where practical. Any new housing developed as part of, or around, a new stadium, should aim to be mixed tenure, to include both family and social rented affordable housing.
- Demonstrate how they have consulted with a diverse range of local community and stakeholder groups to:
  - identify effective uses of the stadium scheme as a community asset;
  - communicate what social infrastructure will be provided; and
  - establish an ongoing relationship with the community.

In addition, in cases of a stadium financed or part-financed with public funds, the Mayor should:

- Require a community forum to be set up to involve the public and communities in a football stadium before the new venue is built. This would give communities a say on how the stadium is used, and what social infrastructure is provided.

3. When should the Mayor intervene in stadium-led regeneration?

Summary

There are two reasons for the Mayor to intervene in stadium-led regeneration projects: if projects stall; and when the level of public investment is so great that there needs to be clear agreements about any on-sales.

Stadium schemes stall for a range of reasons, incurring costs for football clubs and communities

3.1. A new stadium can take a long time to deliver from inception to completion. Among the schemes we visited timescales range from six, to over fifteen years.[47]

3.2. Delays can arise where public-private partnerships are unstable, or as the vision for an area changes. In Tottenham, for example, construction of THFC's proposed stadium has not yet commenced, partly due to renegotiations between the club and council about the contributions THFC will make towards public realm and transport improvements. These discussions resulted in Haringey Council reducing the amount that it expects THFC to contribute from £16.4 million to £0.5 million.[48] A lengthy review of the club's application for a compulsory purchase order of part of the development site has further delayed the scheme.[49] Millwall FC expressed concerns about the progress of regeneration proposals for the Surrey Canal Triangle area around The Den.[50]

3.3. Delays produce costs for multiple stakeholders, and could affect the viability of schemes. In Arsenal FC's case, we heard that:

> *'…for every year that that stadium development could have been delayed, it would create an additional cost of £50 million or*

[47] Appendix 1

[48] LB Haringey, Planning Sub-Committee, *Tottenham Hotspur FC Stadium Redevelopment (Northumberland Development Project) – Revising the s106 Agreement to support a viable development scheme*, 13 February 2012, p. 9

[49] Summary of visit to Tottenham Hotspur FC on 8 July 2014, p. 2

[50] Note of informal meeting with Millwall FC on 2 October 2014, p. 2

£60 million for Arsenal, and they would get to a point when it would not be viable for them to do it.'[51]

3.4. Similarly, communities and local areas could lose out on local economic development, and uncertainty can put off potential investors. Delays can also lead to clubs spending money on obsolete stadium assets. League One club – Brentford FC – told us that if the club is unable to move to a new stadium within three years, it will incur costs in modifying its existing stadium.[52]

3.5. Local authorities intervening in a timely way can reduce delays. Chief Executive of Newham Council, Kim Bromley-Derry, explained the role of local authorities in maintaining pressure on developments to deliver the community benefits they promise:

'…that is one of the roles of the public sector: to ensure the benefits to the community of any investments or to work collaboratively with private investments to accelerate and enhance those.'[53]

The Mayor can facilitate a unified vision, and partnership working

3.6. Unity of vision is important to avoid piecemeal development. Islington Council and Arsenal FC made it clear that developing the Emirates Stadium relied on both stakeholders having a shared objective, as Sarah Ebanja explained:

'From a Council's perspective, we wanted to bring back into use brownfield land that had been empty for 20 or 30 years. In essence it was an area of opportunity that we had sought investors and developers for what we could not achieve. At that time our focus was on new homes in the borough… The other aspect was to create new commercial/business space.'[54]

3.7. This is where the Mayor should step in. The Mayor's objectives for stadia fall under his aims for sports facilities, as set out in the London Plan.

In the London Plan, the Mayor:

[51] Sarah Ebanja, Regeneration Committee 19 June 2014, transcript p. 22
[52] Summary of visit to Brentford FC on 15 July 2014, p. 2
[53] Kim Bromley-Derry, Regeneration Committee 16 September 2014, transcript p. 35
[54] Sarah Ebanja, Regeneration Committee 19 June 2014, transcript p. 6

- Requires large sports facilities providing for spectator sports to deliver broader community benefit, enabling them to 'host a wide range of other community activities;'[55]

- Commits to working with local stakeholders to promote and develop sporting facilities;[56] and

- Requires borough Local Development Frameworks to enhance the 'economic contribution and community role' of sporting developments.[57]

'The existing residents were assured that when the stadium was built, the local underground station, Holloway Road (already a busy one) would be upgraded and extended. Once the deal became a fact, it was announced that this would be too expensive.' – Survey respondent commenting on The Emirates

3.8. Under the Mayor of London Order 2008, local authorities must refer to the Mayor planning applications of 'potential strategic importance', which meet certain criteria (for example, number of homes, floor space, or height).[58] While many stadium schemes will meet referable criteria, sports stadium schemes are not currently automatically included within this provision, and we argue that they should be. This would mean that the Mayor has a say on plans for new and expanded stadia of all sizes, providing an opportunity to assess the extent to which they meet the London Plan objectives. Involving the Mayor will add weight to the demands that the stadium delivers regeneration and associated community benefit.

3.9. Where the Mayor plays a role in delivering transport improvements linked to stadium developments – such as enhancing access to new or existing stadia for Arsenal FC, Brentford FC, Millwall FC, and QPR, he should be using this leverage to ensure that the clubs meet our charter. This could reduce the risk of clubs and local authorities missing much-needed opportunities to upgrade local transport and other amenities to deal with a stadium scheme.

The Mayor must safeguard the public purse

3.10. In addition, the GLA may – at times – be required to provide funding to assist privately-financed schemes. THFC's stadium is an example of the Mayor acting as facilitator, because the Mayor has allocated some of the Mayor's Regeneration Fund to public realm works around the stadium. In effect, the Mayor's contributions cover some of the costs for which THFC was liable under the original section 106 agreement with Haringey Council, such as highway, parking and pedestrian route works, and

[55] London Plan (2011), Paragraph 3.111
[56] London Plan (2011), Policy 3.19
[57] London Plan (2011), Policy 4.6
[58] https://www.london.gov.uk/priorities/planning/strategic-planning-applications

passenger capacity improvements at Tottenham Hale Station.[59] In Tottenham, the Mayor also appointed advisor Neale Coleman as co-chair of the Tottenham Joint Strategic Forum with Haringey Council. This increases the Mayor's sway.

3.11. The Olympic Stadium represents London's priority stadium-led regeneration scheme. Taxpayers, through the Olympic Delivery Authority, paid £429 million to build the Stadium.[60] The LLDC – which the Mayor chairs – is now converting the stadium for its post-Games use, at a cost of £190 million to date.[61] In contrast to Wembley Stadium, its principal tenant WHUFC will be a privately-owned football club, which has contributed £15 million to the conversion costs, and according to one media report, the club will pay £2.5 million annual rent.[62] Other clubs, including Arsenal FC, highlighted the differences between WHUFC's costs, and those of clubs which had self-financed their stadia.

3.12. The Assembly has long recognised the benefits of the Stadium being occupied by a football club as an anchor tenant to maximise footfall and deliver a return for public sector investors.[63] But the public have a right to transparency over the arrangements the stadium partnership has with the Club to safeguard taxpayers' investment. Moreover, recent legislation requires local authorities commit to the principles of open data and transparency, in line with the *Local government transparency code 2014.*[64]

[59] LB Haringey, Planning Sub-Committee, *Tottenham Hotspur FC Stadium Redevelopment (Northumberland Development Project) – Revising the s106 Agreement to support a viable development scheme*, 13 February 2012, p. 6

[60] ODA, October 2012, *London 2012 Olympic and Paralympic Games Quarterly Report*, p.12

[61] The LLDC let a contract to Balfour Beatty worth £154 million for the stadium conversion, and it has since agreed to pay the contractor a further £36 million for additional strengthening work. Minutes of Audit Panel, 22 October 2014, para 6.8

[62] The Independent, West Ham confirmed as future tenants of Olympic Stadium - now the £160m revamp begins, 22 March 2013

[63] See, for example, Economic Development, Culture, Sport and Tourism Committee (September 2010), *Legacy United? The legacy of London's Olympic venues*, p. 30

[64] https://www.gov.uk/government/publications/local-government-transparency-code-2014

'The new Stadium will automatically put West Ham on a pedestal around the world…' – WHUFC Joint-Chairmen[65]

3.13. Therefore, there is a very significant public interest in the Olympic Stadium as the cornerstone of arguably the UK's highest profile regeneration project. One report suggests that WHUFC will be worth £400 million following its move to the Olympic Stadium; up from its £105 million valuation in 2010.[66] Given that public finances worth over £600 million have funded the stadium's construction and conversion costs, Londoners deserve to know what they will receive, should WHUFC's owners sell up. We know that the E20 Stadium Partnership has an agreement with WHUFC that the club will *'make a windfall payment to the LLDC above an agreed base case'* should its owners sell the club within the next ten years.[67] However, we do not know the financial value of this agreement for the taxpayer.[68] Moreover, as an exemplar scheme, the Olympic Stadium should comply with all the points in our Charter.

Conclusion

3.14. The Mayor should make better use of his leverage to achieve regeneration around new stadium developments. The Mayor and GLA should treat stadium development schemes as major strategic projects. Our evidence base suggests that new stadia can have a significant potential impact on local communities. Crucially, they affect the Mayor's ability to deliver on a number of policies in the London Plan, from employment, to community infrastructure, and transport, for example.

3.15. Even in schemes where the Mayor has limited involvement, we should not underestimate the capacity he has to influence schemes. For example, he could use his leverage to ensure that the conversion of WHUFC's Boleyn Ground includes a higher proportion of affordable housing.[69] Crucially, he has leverage through Transport for London (TfL) transport improvements which accompany many stadium proposals, on occasion funding part of the facilitative works around a stadium (in the case of Tottenham).

3.16. Local planning authorities determine stadium-led regeneration schemes. But local authorities have a wider role in addition to determining planning applications. Supported by the London Plan, they establish a framework for regeneration, by setting policy through their Local Plans. Local authorities work in partnership with football clubs and community

[65] WHUFC, *A message from the Joint-Chairmen*, 18 January 2015
[66] The Times, *Deal suits West Ham down to the ground*, 9 January 2015
[67] West Ham United, General FAQs
[68] In the leasehold agreement between E20 Stadium LLP and West Ham United FC, there are provisions that cover the scenario of West Ham being sold, which the LLDC has informed officers are commercially confidential.
[69] See paragraph 3.25

stakeholders to deliver outcomes to support the regeneration of the local area.

3.17. We recognise that the Mayor can play an important role in supporting local authorities to achieve a good deal from football clubs and developers, however. As the planning process may be the Mayor and other public bodies' main involvement in schemes that are otherwise privately-funded (for example, Arsenal FC, Queen's Park Rangers), the Mayor should use this power prudently. In determining planning applications, local authorities and the Mayor should assess whether the stadium scheme helps deliver relevant Mayoral strategies, including the London Plan, to ensure that maximum public benefit is derived from the schemes.

3.18. Undoubtedly, WHUFC's deal with the E20 Stadium Partnership for the Olympic Stadium deal represents a very favourable outcome for the club. We would like to see greater transparency about the agreements the Partnership has with the club. Moreover, the Mayor – as Chair of the MDC – needs to give Londoners a commitment that their investment is guaranteed.

Recommendation 2

Stadium proposals should be subject to strategic oversight by the Mayor. The Mayor should lobby the Department for Communities and Local Government to amend the Mayor of London Order 2008 to include significant stadium expansion within the categories of planning applications that are referable to the Mayor.

Recommendation 3

The Mayor should make provisions for reviewing leasehold agreements – or clawback – for football clubs occupying public-funded stadia, should clubs be sold. Whilst recognising commercial confidentiality, this should not stop interested parties and members of the public from being able to assess the public benefit where either planning decisions or public subsidy contribute to the delivery of a commercial venture.

Specifically, in the case of the Olympic Stadium, the Mayor should publish information about the content of the agreement for clawback with WHUFC. The Mayor should write to the Committee by the end of May 2015 outlining (without prejudicing commercial confidentiality) what the clawback agreement between the E20 Stadium Partnership and WHUFC contains.

Appendix 1 Stadium case studies[70]

Stadium and football club	City of Manchester/ Etihad Stadium (Manchester City FC)	Wembley Stadium (England football team)	The Emirates (Arsenal FC)	Olympic Stadium – *undergoing transformation* (West Ham United FC)	Lionel Road stadium – *to be constructed* (Brentford FC)	New White Hart Lane stadium - *to be constructed* (Tottenham Hotspur FC)
Capacity	48,000 (62,000 from summer 2015)	90,000	60,000	54,000	20,000	56,000
Financing (cost and whether majority public or private sector funds)	£112m construction (public)[71]; £42m transformation (public and club)[72]	£750m construction (public and private)[73]	£390m construction (club)	£429m construction (public); £154m+ transformation[74]	£71m construction (club)[75]	£400m construction (club)[76]
Timescales	Unknown (opened for 2002 Commonwealth Games; MCFC moved in 2003)	c. 15+ years (Development plans began in early 1990s; new stadium opened in 2007)	c. 6+ years (Site purchased in 2000; new stadium opened in 2006; 29 months to build)	c. 9 years (Constructed for London 2012; permanent re-opening in summer 2016).	c. 16 years (planned relocation over 12 years; purchased site in 2012; could move for 2016/17 season.[77]	c. 8 years (club bid for relocation to Olympic Stadium in 2011; plans to open new stadium for 2018/19 season)

[70] Based on information gathered on the Committees site visits and online sources

[71] Public sector and Lottery funding (Manchester City Council, Sport England (Lottery Fund), European Regional Development Fund and Government programme sources) http://www.theguardian.com/football/2011/oct/04/manchester-city-council-stadium-naming-rights?

[72] £22m from council funding for conversion; £20 MCFC funding for hospitality

[73] £120m Lottery grant; remainder borrowing. Earlier estimates reported by the House of Commons Culture Media and Sport Committee in 2002 put the cost at £353m, but the final cost was £750m; http://www.wembleystadium.com/Press/Press-Releases/2013/4/90-Years-Of-Wembley-Stadium.aspx

[74] Of which £15m from WHUFC. Transformation to include unconfirmed additional costs (roof)

[75] To be financed through housing development

[76] THFC has spent £100m to date on land assembly (site visit). £8.5m of Mayor's Regeneration Fund allocated to fund facilitating works (e.g. walkway from WHL Station, and public realm)

[77] New housing is phased to be built over 9 years

Stadium and football club	City of Manchester/ Etihad Stadium (Manchester City FC)	Wembley Stadium (England football team)	The Emirates (Arsenal FC)	Olympic Stadium – *undergoing transformation* (West Ham United FC)	Lionel Road stadium – *to be constructed* (Brentford FC)	New White Hart Lane stadium - *to be constructed* (Tottenham Hotspur FC)
Non-football uses	Concerts, plus a 2015 Rugby World Cup match	Rugby League, American football, concerts (operates 30-35 days a year)	Up to 3 concerts a year	5 Rugby World Cup matches in 2015, UK Athletics (summer); up to 10 concerts a year	Capacity for rugby; Community Sports Trust (and Learning Zone)	*Unknown*
Hard impacts – (e.g. infrastructure)	New tram stop built to connect the Stadium to the city; new footbridge opening to link the stadium and new MCFC Academy campus.	The site has been designed to encourage sustainable travel. There is a partnership with TfL and the GLA to invest in infrastructure.	New £70m Waste Recycling Centre built at cost of (funded by Arsenal FC). Adult learning centre, used by 500 people a year.	£6bn transport investment *(Difficult to isolate the stadium's impact from the other venues and transformation of the Olympic Park area.*	CIL in place. Section 106 agreement includes contributions to education, bus services, CPZs, public realm and Gunnersbury Park.	Wider Tottenham masterplan includes 'destination retail' and indoor sports, cinema, library and learning centre.
Stadium employment and apprenticeships (construction/ operational)	60% local employment in construction jobs[78]; 30 corporate apprentices; 68 construction apprentices (Academy)[79]	106 stadium employees, and 600-700 FA employees now located at the stadium	New stadium has created new temporary employment in an area that was previously derelict[80]	888 construction employees as at July 2014 (26% local);[81] 720 once operational; 75% of which local employment	200 construction jobs over 9 years; followed by c. 300 FTE jobs after construction (stadium, hotel and retail uses)[82]	THFC will offer 50 apprenticeships within the club.

[78] http://www.mcfc.com/The-Club/Stadium-Expansion/Community-Benefits
[79] 94% of whom have long-term job prospects
[80] Committee heard from Learning Centre participant about zero-hours employment in hospitality roles
[81] Letter from Dr Paul Brickell to the Chairman of the Committee, 22 October 2014
[82] Brentford Football Club, Summary of Proposals, November 2013

Stadium and football club	City of Manchester/ Etihad Stadium (Manchester City FC)	Wembley Stadium (England football team)	The Emirates (Arsenal FC)	Olympic Stadium – *undergoing transformation* (West Ham United FC)	Lionel Road stadium – *to be constructed* (Brentford FC)	New White Hart Lane stadium - *to be constructed* (Tottenham Hotspur FC)
New jobs in local area (excluding stadium)	*Unknown; the club procures 84 per cent of goods and services within the M40 corridor*	1000 new jobs at retail outlet	*Unknown*	Up to 20,000 to be created at the Olympic Park over next 10 years[83]	*Unknown*	530 jobs so far (NDP) Overall employment uplift expected to be 5000[84]
Housing	None built by club (Manchester City Council has delivered 1000 new homes in the surrounding area in recent years).	500 units built to date (45% affordable). Housing will take 10-15 years to deliver.	3000 new and refurbished homes (c. 50% affordable). Highbury Stadium converted into 655 apartments.	7000-8000 new homes to be built on the Olympic Park; one third affordable housing; 40% family housing.[85] Boleyn Ground to be developed for housing (838 units) and retail.	910 new homes planned (0% affordable; 1-3 bedroom units) Griffin Park to become 100 family units.	Plans to develop Brook House (222 units). To include 100 shared ownership units, 122 homes for rent and a new building for the Hartsbrook free school.[86] 3000 homes envisaged as part of wider Tottenham masterplan (across 70 acres).[87]

[83] Letter from Dr Paul Brickell to the Chairman of the Committee, 22 October 2014
[84] Haringey is revising in light of new masterplan
[85] Figures from LLDC written submission. Housing to be built as part of LLDC Legacy Communities Scheme, not by WHUFC
[86] http://www.tottenhamjournal.co.uk/news/spurs_stadium_development_school_and_homes_scheme_hits_top_spot_1_3592478
[87] THFC presentation at the Committee's site visit on 8 July 2014

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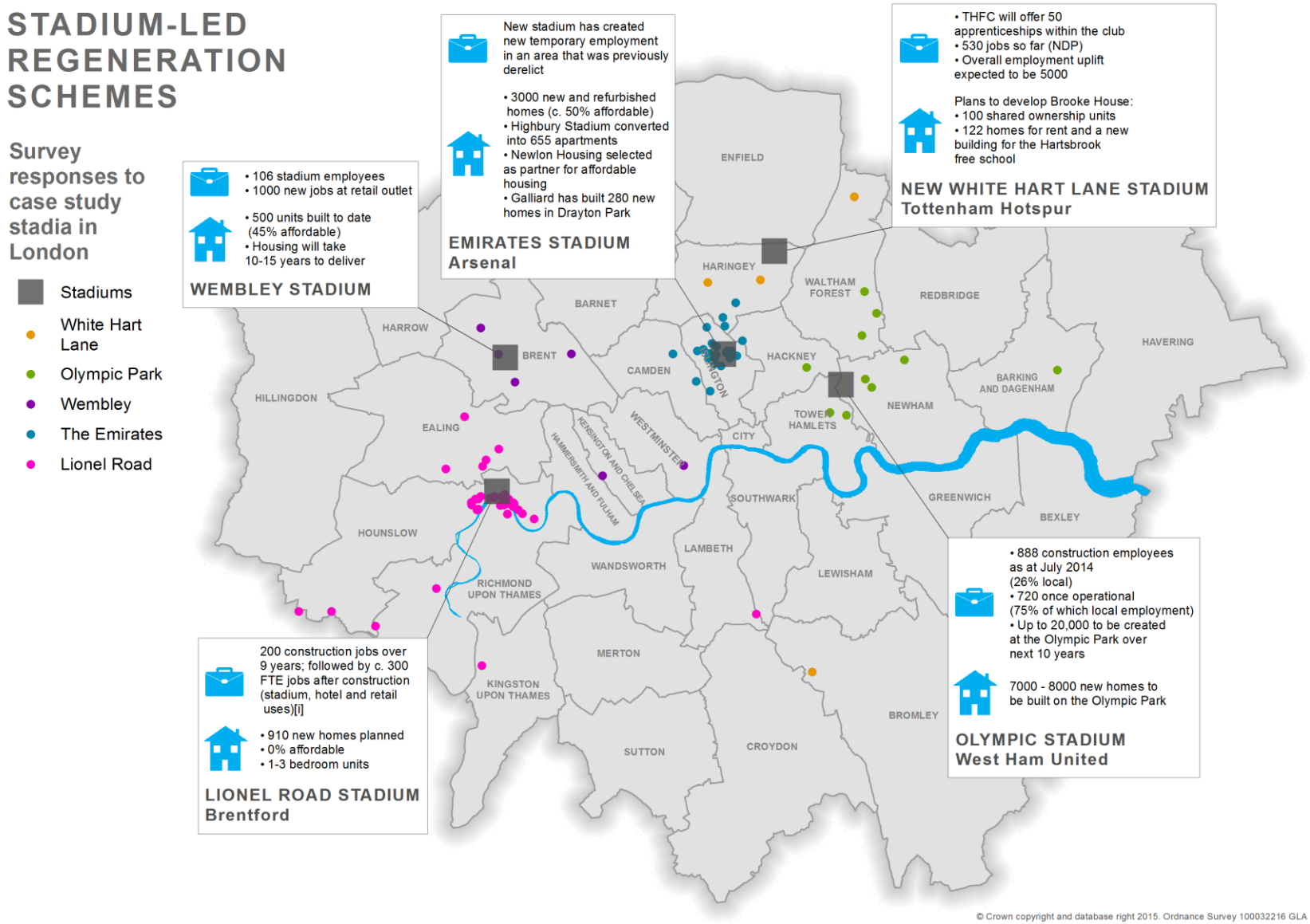
Associated regeneration and partners involved	Near the stadium and Academy, there are plans for commercial-led development (including retail to the south, and a leisure destination with hotels and retail to the north). MCFC soon to deliver a 50-year travel plan, with the possibility of installing new cycle lanes along the road linking the site to the city.	Quintain purchased the land around stadium from Wembley Stadium PLC in 2002. Quintain is developing a destination scheme, including residential, retail outlet, and cinema. LB Brent is redesigning junction and public realm in Wembley town centre.	Newlon Housing selected as partner for affordable housing element of Arsenal scheme. Galliard has built 280 new homes in Drayton Park.	LLDC responsible for the regeneration legacy of the Olympic Park and surrounding area. 6 Growth Boroughs (Newham, Hackney, Waltham Forest, Tower Hamlets, Greenwich, Barking and Dagenham) aiming to achieve convergence with rest of London over 30 years.	Long term infrastructure plan for M4 'Golden Mile', including new rail links.[88] LB Hounslow plans Kew Gate regeneration: developers St George, St James, Ballymore new residential. Sports and community regeneration at Gunnersbury Park.[89]	Stadium part of wider Northumberland Development Project, including new Sainsbury's, University Technical College (opened September 2014). LB Haringey developed a masterplan for the High Road West area, including changes to White Hart Lane station, new stadium walkway, and new housing at Love Lane Estate.
Community benefits	4500 hours of community use annually. 5 acres of Academy site donated to city council for community use: new sixth form college and community pitch.	1% of stadium profits allocated to local causes	Stadium used for community programmes in 4 boroughs (e.g. workshops). New sports centre to open spring 2015. £500,000 disbursed locally through a	100,000 free tickets available to Newham residents every year. Stadium to host 10 community events a year and Newham Run. Adjacent	Brentford FC Community Sports Trust (CST) Learning Zone (LZ) delivers curriculum-linked activities for 1000 students a year. LZ facility will be 3 times bigger in new stadium.	

[88] Plans for conversion of a goods railway line to Willesden Junction, and reinstatement of a disused line to Southall.
[89] New pitches and community hub (requires Sport England and other funding).

	MCFC funded a new high school in the area which opened 5 years ago.		community trust.	community athletics track will provide community access 250 days a year.		
Charitable/ foundation work	Wellbeing scheme run by the club is free and reaches 500,000 people every year	Big Lottery Fund requires Wembley Stadium PLC to put 1% of annual profits towards charitable causes	Community programme worth £1m a year. Gunners Fund distributes grants worth a total of £50,000 a year.	West Ham Community Trust work worth c. £1.3m a year on 20+ work streams; expected to expand following move	Community activities currently worth £8m a year; expected to increase to over £11m a year following the move.	"Largest charitable foundation in the Premier League", underwritten to value of £4m a year
Stadium and football club	**City of Manchester/ Etihad Stadium (Manchester City FC)**	**Wembley Stadium (England football team)**	**The Emirates (Arsenal FC)**	**Olympic Stadium – *undergoing transformation* (West Ham United FC)**	**Lionel Road stadium – *to be constructed* (Brentford FC)**	**New White Hart Lane stadium - *to be constructed* (Tottenham Hotspur FC)**

Map 1: Five case study football clubs in London, showing survey respondents and some associated outcomes



Map 2: Locations of London's football clubs in the top six divisions

Appendix 2 Recommendations

Recommendation 1

In the next iteration of the London Plan, the Mayor should incorporate a Charter for stadium developments as part of amendments to the Plan. In the intervening period, the Mayor should have regard to the Charter when reviewing stadium planning applications.

Local authorities should have regard to the stadium Charter in their Local Plans.

Charter for effective stadium-led regeneration

Football clubs and relevant local authorities seeking to develop a stadium-led regeneration scheme should commit to:

- A clear vision and policies for place-making around the new (or expanded) stadium, including public transport connectivity and permeability between the stadium and surrounding area.

- Undertake a skills mapping exercise to assess local capacity to take advantage of new jobs. The results should inform a skills and employment strategy, including measures to prepare and upskill local communities in order that they can access the new jobs.

- Pay the London Living Wage to all stadium employees.

- Support the Mayor's housing targets in all stadium-led regeneration schemes, where practical. Any new housing developed as part of, or around, a new stadium, should aim to be mixed tenure, to include both family and social rented affordable housing.

- Demonstrate how they have consulted with a diverse range of local community and stakeholder groups to:

  - identify effective uses of the stadium scheme as a community asset;
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In addition, in cases of stadia financed or part-financed with public funds, the Mayor should:

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Appendix 3 Survey Results

Stadium-led regeneration survey

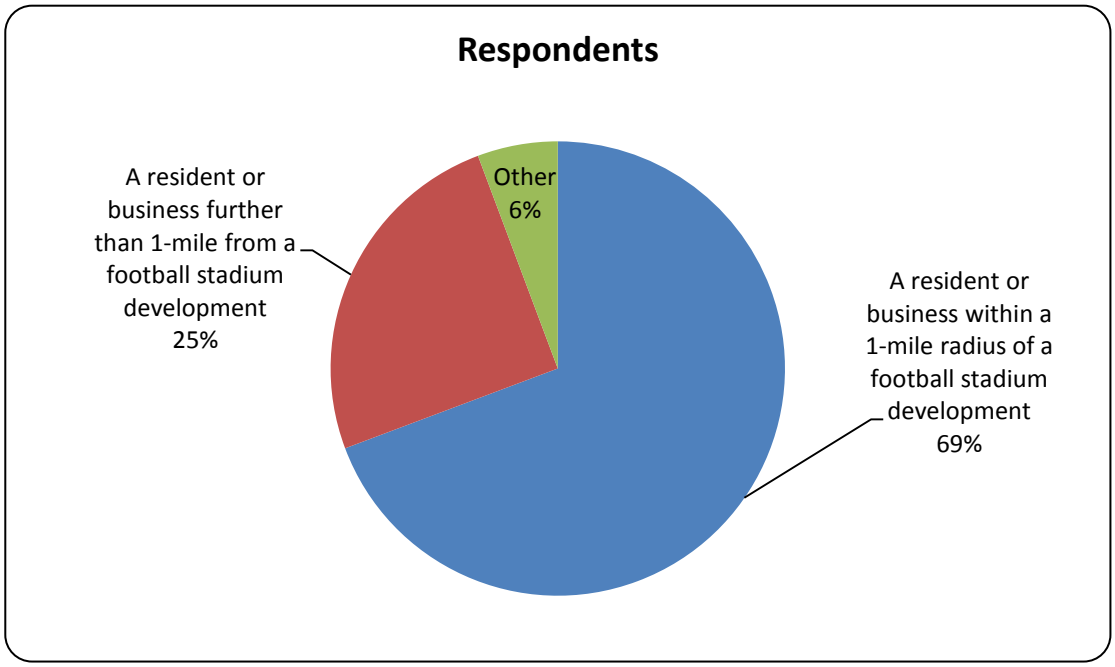
The Committee ran an online survey between 4 September and 31 October 2014 to seek the views of people living and working near new or redeveloped football stadia, or near where a new stadium was proposed.

The survey was hosted on Talk London, the GLA's online engagement portal. It was advertised on the Committee's website and through social media channels, specifically targeting people in areas near new or proposed new stadia. Respondents to this survey were self-selecting, and therefore the sample is not representative of London's population.

1. Respondents

140 people responded to the Committee's survey.[90]

We asked people whether they were responding as local residents and businesses, or in a different capacity. The chart below shows who responded. Almost 7 in 10 respondents lived or worked within 1 mile of a stadium development.



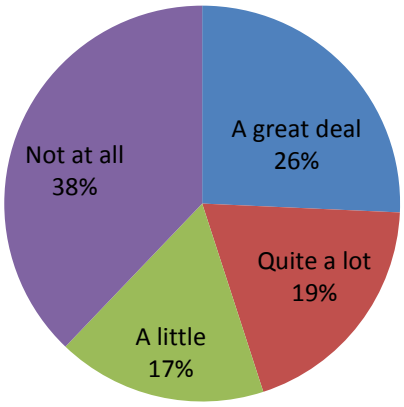
[90] There were 140 fully completed surveys. These results do not include 32 respondents who partially responded.

We asked respondents to name which stadium their responses related to. A table showing the number of responses for each stadium is provided at the end of the appendix. Over 41 per cent of respondents (58 people) commented on Brentford FC. The large number of responses relating to Brentford FC is likely to reflect the fact that the club's plans for a new stadium had a high profile at the time the survey was run (with the club's planning application having been approved by the local council in July 2013). Twenty-one per cent of respondents commented on Arsenal FC and the remainder were shared relatively equally among other past and current football clubs and stadia involved in stadium-led regeneration.

2. Opinions on the impact of a redeveloped stadium

We asked respondents whether a new stadium would improve the local area. Sixty-two per cent thought it would have some positive impact,[91] and just over a quarter said it would improve the area a great deal. Over one third thought that it would not improve the area at all.

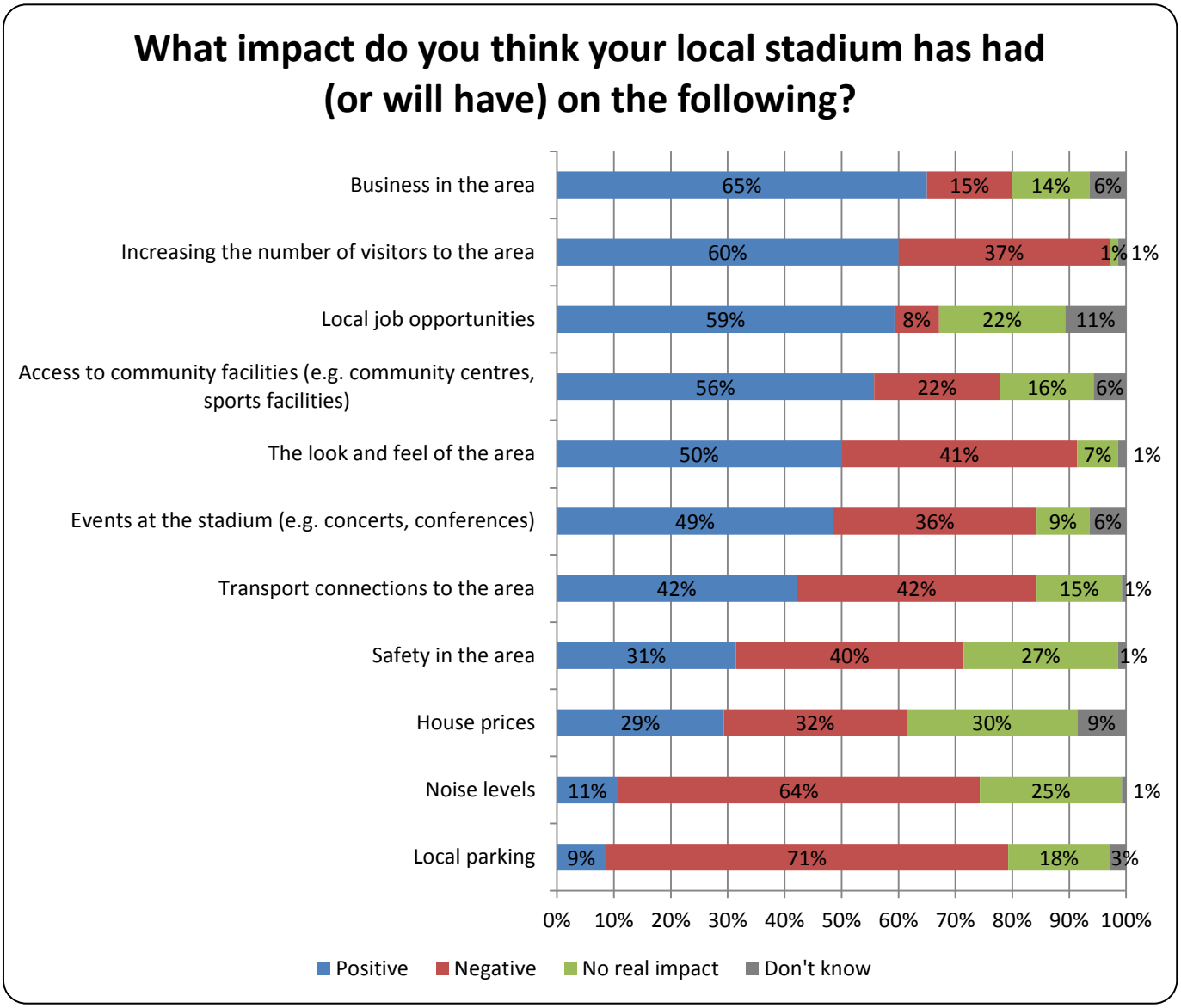
Overall, to what extent do you think the new, or redeveloped stadium has improved, or will improve, the local area?



[91] This includes those who said 'a great deal', 'quite a lot', or 'a little'.

3. Specific impacts of a stadium development

We asked survey respondents what impact they thought a stadium had (or would have) on a number of specific issues in the local area.[92]



[92] The results for both 'a significant positive impact' and 'a slight positive impact' have been combined into one category, as have the results for 'a significant negative impact' and 'a slight negative impact'.

Positive

Local business, increased visitor numbers, access to community facilities and local job opportunities were the local issues that respondents felt would benefit most positively from the stadium. Over 50 per cent of respondents said these would have a positive impact.

Negative

In contrast, respondents identified parking and noise levels as negative impacts of the stadium. 71 per cent of respondents felt that the stadium would have a negative impact on local parking, and 64 per cent thought it would negatively affect noise levels.

Split opinion

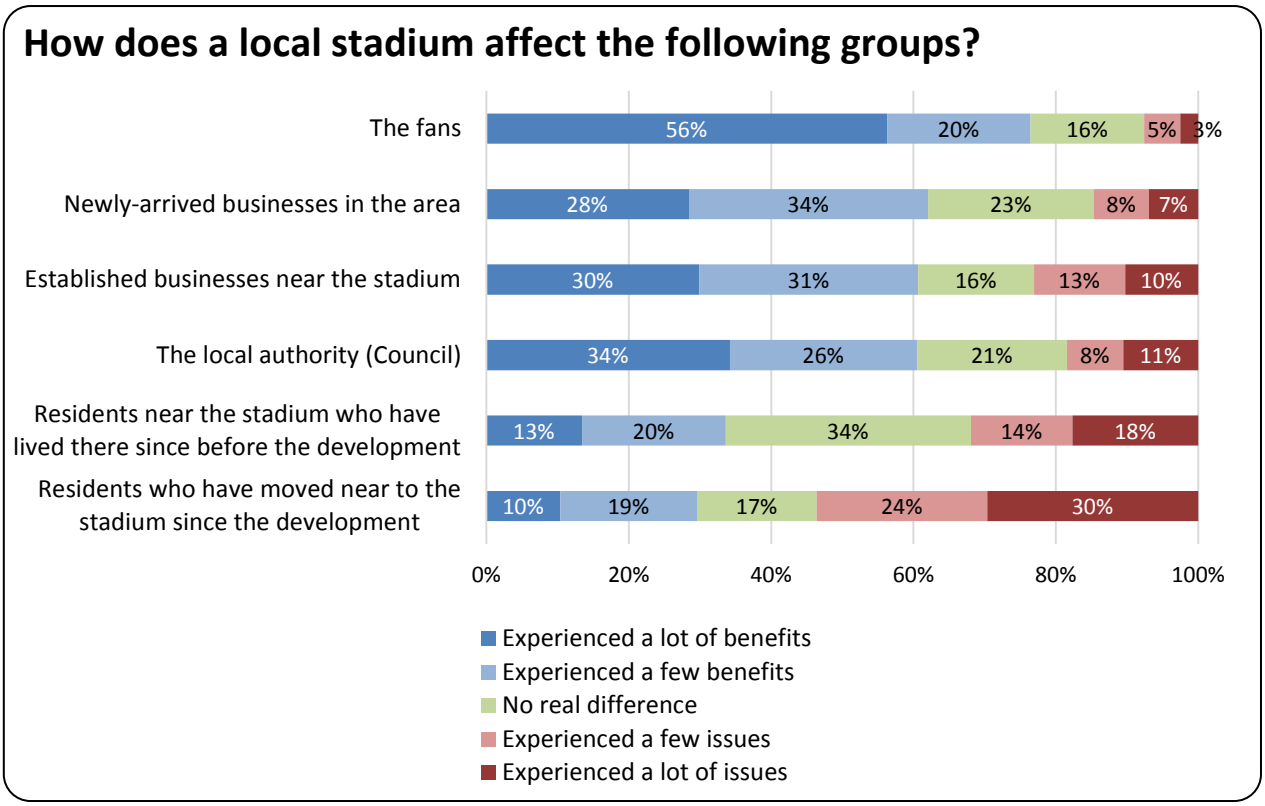
A number of issues attracted similar levels of positive and negative responses. On transport connections to the area, for example, 42 per cent thought the stadium had a positive effect, while a further 42 per cent thought that it had a negative effect. Opinion was similarly divided on safety in the area, with 31 per cent considering the stadium had a positive impact, and 40 per cent who thought it had a negative impact.

No change/ neutral

House prices were the issue on which the largest proportion respondents thought that the stadium would have no real impact (with 30 per cent choosing this option).

4. Who benefits from stadium-led regeneration?

We also asked respondents which groups benefit from stadium-led regeneration.



Positive

Of the stakeholder groups we listed, 56 per cent of respondents thought that fans experienced a lot of benefits, and only 8 per cent of respondents thought that fans experienced a lot or a few issues.

Sixty per cent of respondents thought that local authorities and newly arrived and established businesses near the stadium would experience at least some benefits from the stadium.[93]

Negative

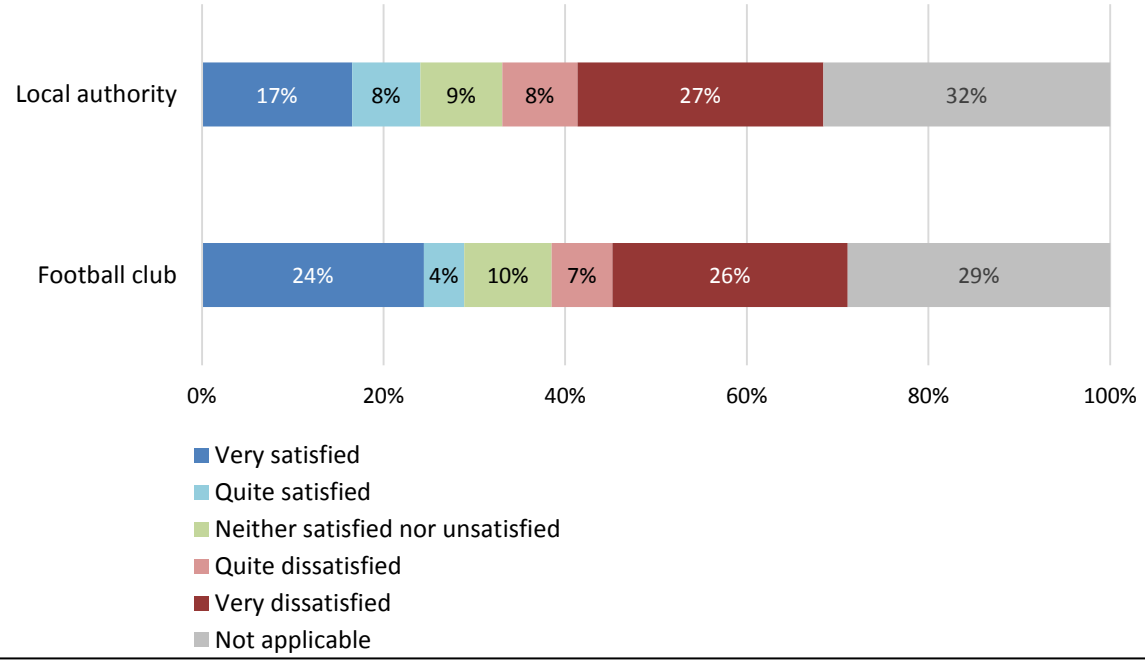
Respondents said that the group that experience the fewest benefits were residents near the stadium who have lived there since before the development, with only 10 per cent saying this group experienced a lot of benefits, compared to 30 per cent who thought this group experienced a lot of issues.

[93] This includes those who said 'experienced a lot of benefits' or 'experienced a few benefits

5. Consultation

We asked people whether they had been consulted about the stadium development by the football club or the local authority.

If your local authority or football club consulted you about a stadium development, how satisfied were you with this?



Respondents were slightly more satisfied with consultation by the football club compared to consultation by the local authority. Twenty-eight per cent of respondents were very or quite satisfied with consultation by the club, and 25 per cent of respondents were very or quite satisfied with consultation by the local authority.

However, more than 25 per cent of respondents were very dissatisfied with consultation, whether by the football club or the local authority.

Three in ten respondents chose ‘not applicable’ for both consultation by the local authority and the football club. There could be several reasons for this, such as not having lived near the stadium at the time of the consultation, or not having been consulted.

6. Qualitative results

We asked respondents two open-ended questions:

- Please tell us what impact you think your local stadium has had on the surrounding area (allowing respondents to provide further information on the issues stadium development might affect). **125** people answered this question.

- Please tell us more about why you were satisfied or dissatisfied with the consultation (providing opportunity to comment on consultation processes for stadium-led regeneration). **89** people answered this question.

Comments on the impact of a redeveloped stadium on the local area

A sample of some of the themes raised in the open comments is shown below:

Positive impacts of new stadia

- New people coming into the area will improve it

- New money will benefit local businesses and pubs

- Areas around the Olympic Park are being regenerated, but football plays only a small part

- Clubs are already invested in the community, and they will continue to be in the new venue

- There is considerable pride in local clubs

Negative impacts of new stadia

- Perceived problems with parking, noise, and litter affect residents' standard of living

- There is already considerable disruption (i.e. congestion and anti-social behaviour) on match days due to the fan influx

- Stadium-led regeneration is good for those who can afford to live near it, but not for those who cannot

- Closure and relocation of pre-existing businesses on stadium development sites

- *Brentford FC specifically*: Expectations that the new (larger) stadium will worsen congestion on already congested local roads

Comments on levels of satisfaction with consultation on stadium redevelopment

A sample of some of the themes raised in the open comments is shown below:

- People attend consultation events if they are interested

- The local authority is consulting residents, but from a biased position

- Local authorities are too close to football clubs

- The football club ignores local residents' opposition to additional revenue-generating activities (i.e. concerts)

- No awareness of, or involvement in, consultation activities

- The club has reneged on promises it made to the local community during consultation

- Permission was granted for a new stadium, despite lack of support; opponents were ignored

Breakdown of survey respondents

Which stadium do you live near / are you commenting on in this survey?	
Brentford - Griffin Park/ Lionel Road site	58
Arsenal - The Emirates	29
West Ham United - Olympic Park	8
Dulwich Hamlet - Champion Hill	8
Chelsea - Stamford Bridge	6
Queen's Park Rangers - Loftus Road/ Old Oak Common	6
Wembley	6
Charlton Athletic - The Valley	5
Fulham - Craven Cottage	4
Tottenham - White Hart Lane	4
Other	6
Total	**140**

Appendix 4 How we conducted this investigation

At its meeting on 19 June 2014, the Committee agreed the terms of reference for its investigation, to:

- Review evidence from past and current stadium-led regeneration schemes to assess the benefits of stadium development programmes to both football clubs and local communities;
- Review the role of the Mayor in stadium regeneration schemes and assess the extent to which his objectives for stadium-led regeneration in the London Plan are being met; and
- Develop recommendations for the Mayor to ensure current stadium development schemes – in particular the Olympic Stadium – deliver a genuine regeneration legacy for local communities.

In our investigation, we have gathered evidence from a broad range of groups that a new stadium affects. This includes football clubs, local councils, developers, advisors, community groups, local businesses, and individuals, including those who live near new or proposed stadia.

We held two formal meetings with the following guests:

19 June 2014

- Gabriel Ahlfeldt, Associate Professor of Urban Economics and Land Development, London School of Economics;
- Pete Bradshaw, Head of Infrastructure and CSR, Manchester City FC;
- Sarah Ebanja, Chair, Newlon Group, and independent consultant (formerly Deputy Chief Executive, London Borough of Islington);
- Ken Friar, Director, Arsenal FC;
- Michelle Moore, Moore Development Consultancy; and
- Antony Spencer, Stadium Capital Holdings.

16 September 2014

- Dr Paul Brickell, Executive Director of Regeneration and Community Partnerships, London Legacy Development Corporation (LLDC);
- Kim Bromley-Derry, Chief Executive, London Borough of Newham;
- Mark Donnelly, Chief Operating Officer, Queen's Park Rangers FC; and
- Joe Lyons, Head of Community, West Ham United Football Club.

We also carried out six site visits to stadia and football clubs, invited groups to submit written information, conducted a survey of residents and businesses living and working near football stadia, held a focus group with businesses operating near the Emirates Stadium in Islington, and held informal meetings with Cargiant and Millwall FC.[94] The transcripts, visit and meeting summaries are available on the website.

[94] We met with Cargiant, landowners of an area at Old Oak Common, where a future potential stadium for QPR FC is proposed. We met with Millwall FC regarding proposals for development around The Den Stadium (Surrey Canal Triangle).

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Hindi

यदि आपको इस दस्तावेज का सारांश अपनी भाषा में
चाहिए तो उपर दिये हुए नंबर पर फोन करें या उपर दिये
गये डाक पते या ई मेल पते पर हम से संपर्क करें।

Vietnamese

Nếu ông (bà) muốn nội dung văn bản này được dịch sang tiếng Việt, xin vui lòng liên hệ với chúng tôi bằng điện thoại, thư hoặc thư điện tử theo địa chỉ ở trên.

Bengali

আপনি যদি এই দলিলের একটা সারাংশ নিজের ভাষায় পেতে চান,
তাহলে দয়া করে ফো করবেন অথবা উল্লেখিত ডাক ঠিকানায় বা
ই-মেইল ঠিকানায় আমাদের সাথে যোগাযোগ করবেন।

Greek

Εάν επιθυμείτε περίληψη αυτού του κειμένου στην γλώσσα σας, παρακαλώ καλέστε τον αριθμό ή επικοινωνήστε μαζί μας στην ανωτέρω ταχυδρομική ή την ηλεκτρονική διεύθυνση.

Urdu

اگر آپ کو اس دستاویز کا خلاصہ اپنی زبان میں
درکار ہو تو، براہ کرم نمبر پر فون کریں
یا مذکورہ بالا ڈاک کے پتے یا ای میل
پتے پر ہم سے رابطہ کریں۔

Turkish

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Arabic

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فرجاء الاتصال برقم الهاتف أو الاتصال على
العنوان البريدي العادي أو عنوان البريد
الإلكتروني أعلاه.

Punjabi

ਜੇ ਤੁਸੀਂ ਇਸ ਦਸਤਾਵੇਜ਼ ਦਾ ਸੰਖੇਪ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਲੈਣਾ ਚਾਹੋ, ਤਾਂ ਕਿਰਪਾ ਕਰਕੇ ਇਸ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਉਪਰ ਦਿੱਤੇ ਡਾਕ ਜਾਂ ਈਮੇਲ ਪਤੇ 'ਤੇ ਸਾਨੂੰ ਸੰਪਰਕ ਕਰੋ।

Gujarati

જો તમારે આ દસ્તાવેજનો સાર તમારી ભાષામાં
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Greater London Authority

City Hall
The Queen's Walk
More London
London SE1 2AA

Enquiries 020 7983 4100
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ISBN 978 1 84781 163 9

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