

The catalytic impact of a community sports stadium as the anchor project in the Aberdeen Beach Masterplan

Independent report prepared by the Research
Chamber at Aberdeen & Grampian Chamber of
Commerce and MKA Economics - September 2022





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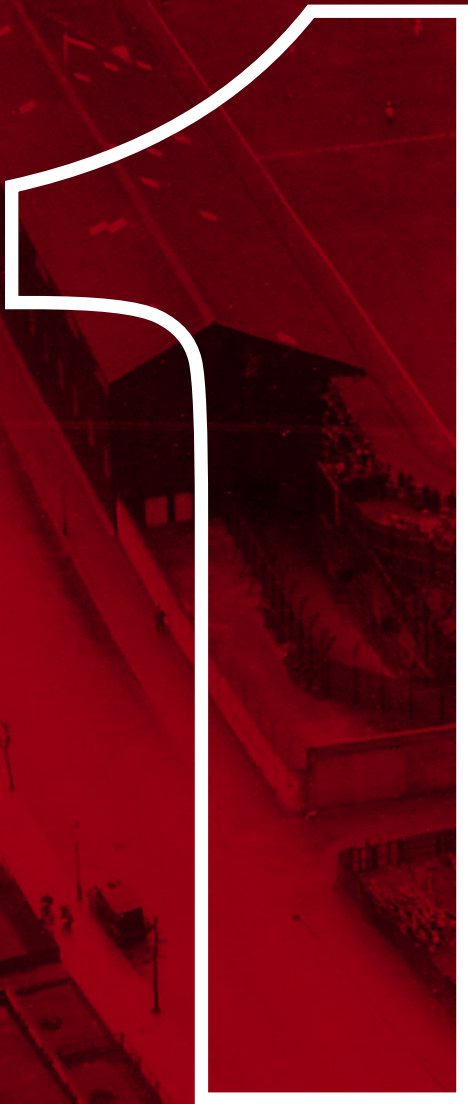
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INTRODUCTION



1.1 Context

Aberdeen and Grampian Chamber of Commerce and MKA Economics were commissioned by Aberdeen Football Club and Aberdeen City Council to complete an independent evaluation of the strategic and economic importance of a new football stadium as the anchor project within the wider beach masterplan.

The plans are hugely ambitious, with the potential to be transformational for the beach area, Aberdeen city and wider region bringing positive economic and social impacts to the benefit of residents and business community.

Experience tells us that change projects of this scale succeed where there is an anchor project, building or brand at their core.

The beach area will have a key role in the development of the North East Adventure Tourism plans being led by Opportunity North East for the area to be seen as an active sports destination for residents and tourists.

The proposals being developed reflect all of the above and will provide world class community, leisure and sports facilities centred around a new 16,000 - 18,000 capacity stadium.

In line with Aberdeen City Council's Net Zero Vision to reduce carbon emissions and become a climate positive city, there is the opportunity to ensure that the design and build of the stadium positions it uniquely to be one of the world's first net zero arenas.

1.2 Research objective

The objective of the research is to present an independent Strategic Business Case (SBC) for these plans.

This assessment has been carried out in line with HM Treasury guidance, assessing the strategic rationale of the proposal, its economic benefits, commercial viability, financial requirements and project management arrangements. The methodology adopted for completing the business case is compliant with HMT's Five-Case Business Model. This was supplemented by regeneration case studies and a survey, amongst the public (football fans & non-fans), business and community groups.



EXECUTIVE SUMMARY



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A new stadium, as part of wider community sports facilities, at Aberdeen beach is projected to inject at least £1billion into the local economy over the next 50 years.

The catalytic impact of a community sports stadium complex as the centrepiece in the Aberdeen beach masterplan is revealed in this report, commissioned by Aberdeen City Council and Aberdeen Football Club carried out by Aberdeen & Grampian Chamber of Commerce and MKA Economics.

The report shows how the development will create new jobs and generate additional income in the economy through stimulating construction activity, driving greater footfall to the area through increased use of the new beach facilities, in turn retaining and increasing spend in the city centre and at the beach. Additionally this will encourage the growth of existing businesses and the creation of new ones due to the higher number of visitors.

Early stage, conservative estimates reveal that the stadium and community facilities would generate an additional £20m into the local economy every year.

A new stadium would deliver £14.3m of additional GVA per annum by directly supporting 260 jobs and providing £6m per annum in salaries.

Furthermore, £80million will be injected in construction activity, creating almost 400 jobs in the sector during the build phase. This compelling case for a new stadium and community sports facilities as the anchor project for the beachfront masterplan focuses solely on the economic and social impact of this single element of the project and not on the additional benefits that will come from the other 21 interventions that make up the plan.

However, the evidence shows that - to be successful - regeneration projects of this type need a centrepiece. The highlighted examples from other ambitious cities across the UK and Europe demonstrate how stadium and other sports and leisure facilities at the core of wider development plans have clearly been the catalyst that captured the imagination of investors, business community and the wider public ensuring the success of the overall scheme.

A new, net-zero, sea-facing stadium would drive the footfall necessary to enable the regeneration of the beachfront, including a potential urban park, revitalisation of the beach ballroom and the creation of superior leisure facilities so that the area becomes a true destination. Without it, the other parts of the plan are likely to be less impactful.

The study also demonstrates the strong strategic fit of the proposal which is aligned to both regional and national growth strategies. Underlining Aberdeen's ambition as a modern, forward-thinking city, the proposed stadium and community development would send out a positive signal about being open for business and investment while, internally, boosting civic pride and supporting the health and wellbeing of our citizens.

1. The survey revealed strong support for the beach regeneration plans with 91% very or fairly keen. The majority of those not interested in football were also supportive.
2. The main concerns centred around perceived loss of current beach facilities like the ice rink and queries around access and transport plans.
3. Many see the beach as an under-used asset, in need of regeneration with the plans achieving an 8.7/10 approval rating.
4. Most fans are keen to see the stadium stay at the beach as it is viewed as the club's natural home.
5. Three in five said that they would use the new sports and leisure facilities more than they do currently, promoting healthier lifestyle. **See section 8 for full sample and survey data.**
6. There is a strong strategic fit to these proposals, aligning with national and regional strategies for economic growth, supporting regional and national tourism targets and the ambition of getting more people active. **See section 3.**
7. The vast majority thought that the regeneration plans would stimulate additional private investment (78% yes v 9% no). Business owners (83% yes v 5% no).
8. Regeneration projects that have a flagship centrepiece, or signature development, at their heart will unlock private and further public support and unleash wider spin-off benefits as realised in other waterfront locations such as the V&A in Dundee, Pacific Quay in Glasgow and the Scottish Government Headquarters in Edinburgh. Landmark constructions can unlock further investment and regeneration. For example the Kelpies and Falkirk Wheel turned a piece of Scottish Canals wasteland into an international visitor destination. **See section 6.**
9. There are numerous examples where stadium developments have acted as the catalyst for wider regeneration and place-making, such as the Commonwealth Stadium in Manchester, Brentford FC and Tottenham Hotspur's new grounds, the emerging proposals by Everton FC on the shore of the River Mersey and, perhaps most iconic of all, London's Olympic Stadium in the east end of London. The evidence in this report backs up that the proposed stadium at Aberdeen beach would have a similar impact to the projects listed above. **See section 6.**
10. The proposals will support the growth of existing local companies and stimulate the formation of new enterprises. In turn this will help broaden the city's economic base through supply chain benefits, wider commercial opportunities and ultimately increase corporation and non-domestic taxation revenues. **See section 4.**
11. The operational impact of locating a new stadium at the beach will drive significant economic benefits, directly supporting 260 jobs, providing £6.0m per annum in salaries and £14.3m of GVA. It will inject £80m in construction activity and generate almost 600 person years of construction employment. It should be noted these are early stage estimates and are conservative as they do not include multiplier and supply chain benefit effects as a result of these posts and spending by the club. **See section 4.**
12. The Aberdeen FC Community Trust currently delivers a significant economic and social contribution. In 2018, the Scottish FA and UEFA commissioned a report to uncover the "unique tangible evidence" that participation in football has on the city and region's economic, social and health wellbeing. It determined that grassroots football throughout the region has a value of £97m to society. Indeed, for every £1 invested in AFCCT it delivers a £10 cumulative return. **See section 6.** This development and the enhanced access to facilities it will provide, will enable AFCCT to build on this.





STRATEGIC CASE



This section sets out the strategic rationale in policy terms for supporting the proposed stadium development at Aberdeen Beach. This focuses on national and regional economic development and planning policies, and initiatives promoting regional tourism and community sports participation in the city.

We have focused on 14 relevant strategies and activities.



3.1 National Strategy for Economic Transformation, 2022

In March 2022, Scottish Government replaced the Scottish Economic Strategy with the National Strategy for Economic Transformation (NSET). The strategy sets out:

‘Our vision for Scotland in 2032 is a wellbeing economy: thriving across economic, social and environmental dimensions, one that delivers economic prosperity for all Scotland’s people and places.’

The strategy framework is structured around eight broad priority areas, where Scottish Government actions will be targeted, aiming for Scotland to be recognised at home and throughout the world as:

- an international benchmark for how an economy can decarbonise
- the best place to start and grow a business or social enterprise
- a magnet for inward investment
- a great place to live and work with high living standards
- a nation where people and businesses can continually upgrade their skills
- a leader in research and development
- a country where economic power and opportunity is distributed fairly
- an outward looking nation exerting a meaningful influence

Transforming Scotland’s economy is a national endeavour. Government, enterprise and skills agencies, business, trade unions, third sector, social enterprises and the people of Scotland all have a part to play. The aim is to be successful by pulling together as one – a Team Scotland approach.

Tourism has a key role to play in driving sustainability and economic growth in Scotland’s local and national economies; creating jobs, adding vibrancy, enhancing our places, and helping to improve the nation’s health and wellbeing. Tourism is ‘A Force for Good’ and as such given the significance of the sectors contribution to society and Scotland’s balance sheet it must continue to be supported by favourable national and local government policy, public and private sector investment and targeted strategic support from economic development agencies who must be sufficiently resourced in tourism.

The proposed development will play an important role across a number of the aims, notably around creating an environment which will help businesses grow, create employment as well as having an international perspective by helping to build on the plans for Aberdeen Beach, Aberdeen as globally connected and recognised city for leisure and business and acting as a magnet for inward investment. It will also support AFC’s ambition to be a leading football club in Scotland and in Europe.

As a major local institution and employer, AFC is seeking to invest a significant sum of money in Aberdeen to underpin a successful future as a UEFA top 100 team thereby offering further economic and jobs benefits. The proposed development directly supports the ambitions of the new national strategy through placemaking via the City Centre Masterplan. The stadium itself will attract regular tourism visits on match days and special events but will also be a 365 day-a-year community facility offering access to other sports and events, attracting and retaining visitors to the improved offer at Aberdeen Beach.

3.2 Scottish Planning Policy, 2014

The revised Scottish Planning Policy (SPP) is the latest statement of the Scottish Government's policy on land use planning matters. The SPP is founded on sustainable economic growth principles and is governed by national economic strategy, which confirms that the planning system should proactively support development that contributes to sustainable economic growth and to high quality places.

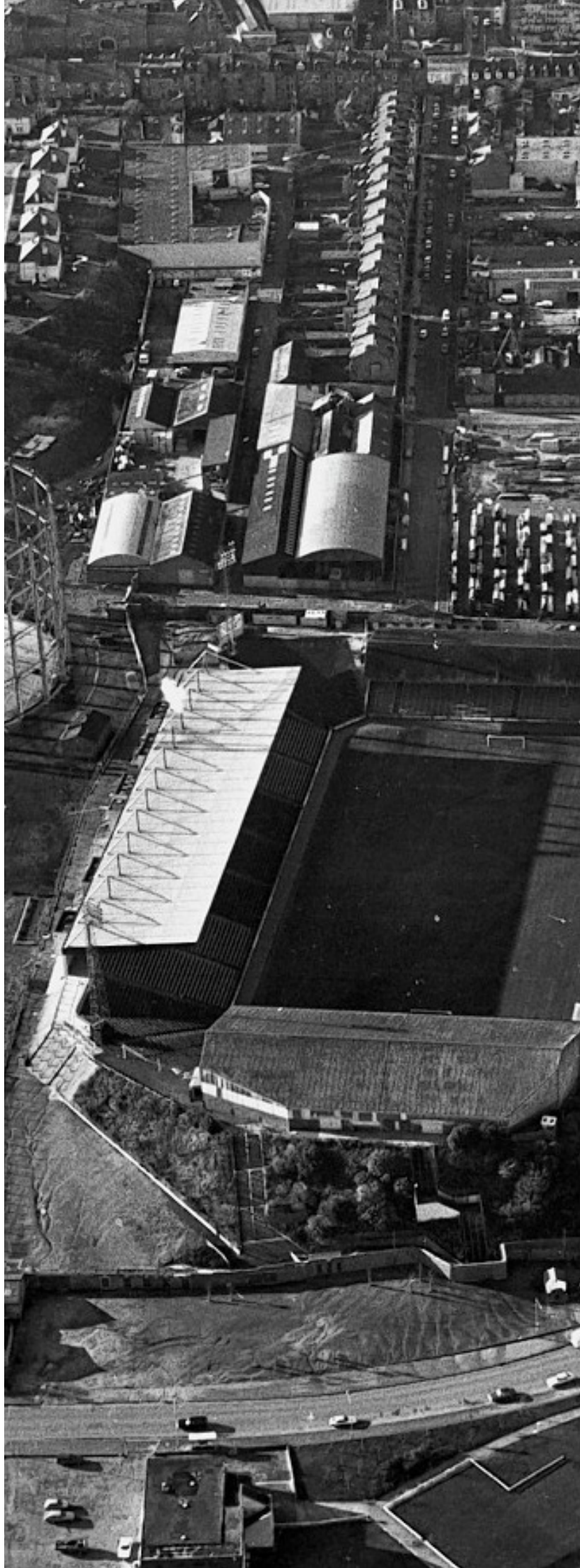
One of the four overarching outcomes of the SPP is *'A successful, sustainable place' and to support 'sustainable economic growth and regeneration, and the creation of well-designed, sustainable places'*.

The SPP (at paragraphs 1 and 24) confirms that the Scottish Government's central purpose is to focus on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.

Sustainable economic growth is defined as: *'Building a dynamic and growing economy that will provide prosperity and opportunities for all, while ensuring that future generations can enjoy a better quality of life too'*. Achieving sustainable economic growth requires a planning system that enables the development of growth enhancing activities across Scotland and protects the quality of the natural and built environment as an asset for that growth.

The SPP recognises that good planning plays an important role in *'creating opportunities for people to contribute to a growing, adaptable and productive economy'*. It also notes that ***allocating 'sites and creating places that are attractive to growing economic sectors, and enabling the delivery of necessary infrastructure, planning can help provide the confidence required to secure private sector investment, thus supporting innovation, creating employment and benefiting related businesses'***.

The proposed development will be designed in line with requirements of the current SPP, which is to be replaced by the current draft National Planning Framework 4 (NPF4).



3.3 Draft National Planning Framework 4, 2022

The Scottish Government is currently in the process of developing a new national spatial strategy for Scotland, which sets out how their approach to planning and development will help to achieve a net zero, sustainable Scotland by 2045.

The consultative draft sets out how each part of Scotland can be planned and developed to create: **sustainable places**, reducing emissions and restoring better connections with biodiversity; **liveable places**, where people can live better, healthier lives; **productive places**, where communities have a greener, fairer and more inclusive wellbeing economy; and **distinctive places**, where there is a recognition to work with natural and built assets.

The new NPF4 has a target of achieving the national net zero target by 2045 and understands the vital role played by the environment, whilst also supporting the twin objective of being a productive and prosperous nation. NPF4 seeks to develop and sustain future places that will **attract new investment, build business confidence, stimulate entrepreneurship and facilitate future ways of working - improving economic, social and environmental wellbeing.**

3.4 Draft Advice on Net Economic Benefit and Planning, 2016

Following publication of the revised Scottish Planning Policy in 2014, Scottish Ministers committed to developing further advice to assist in assessing and giving due weight to the net economic benefit of the proposed development.

The note highlights the importance of demonstrating the net economic benefit of a proposed scheme, taking economic benefits into account when determining a planning decision.

The Draft Advice states, *'where net economic benefit is likely to be a material consideration in the decision, the onus will be on the developer to provide the relevant information in support of the planning application. The planning authority will evaluate the assessment of net economic benefit provided by the applicant.'*

The proposed development, as part of the wider masterplan, offers the potential to create a ground-breaking net zero sports stadium aligned with our regional and national ambitions. It will also add to our tourism offer and will provide facilities that promote health and well-being.

This report has been commissioned in line with this guidance and demonstrates clear and ongoing economic and social benefits arising from making the initial investment.

3.5 Scottish Economic Recovery Implementation Plan, 2020

The Scottish Government published a Covid-19 economic recovery implementation plan in August 2020, setting out the actions it is taking across six main themes to secure a jobs-focused and socially just economic recovery, these being:

- Protecting jobs by supporting business recovery and sustainable, green growth
- Creating jobs through business engagement and a partnership approach
- Supporting access to good quality jobs through employment, skills and training
- Boosting local job creation through resilient people, communities and places
- Creating jobs and a Just Transition through investment-led sustainable growth
- Monitoring progress and outcomes

The Scottish Government's Covid-19 economic response and recovery programme initially focused on protecting the economy, sectors, business and households from the worst and most immediate impacts of the pandemic. The Scottish Government provided a package of support, totalling over £2.3 billion, to protect business.

It is noted in the plan that 'better planning and regulation' is required to support the economic recovery. The plan recognises that planning and regulatory systems will be crucial in supporting investment and growth as part of the economic recovery, while maintaining high standards and the Scottish Government is currently taking forward the changes introduced by the Planning (Scotland) Act 2019. This focus on implementation of the changes already introduced alongside improved practice, is seen as the most immediate way of improving the planning service and ensuring that it supports recovery effectively.

The proposed development can help support the economic recovery of Aberdeen city centre from the devastating effects of the Covid-19 pandemic, which has resulted in significant business closures, lost employment- notably in the travel and hospitality sectors- and reduced footfall and spend in the centre of Aberdeen. The proposed development can play a role in reversing these trends.

The financial footing of Aberdeen FC was adversely affected by the Covid-19 pandemic. This investment will help safeguard AFC's position as a leading football club and important economic and community contributor. As we have seen from other places, the plans will also unlock other investment as the proposed stadium would be the key 'signature' component of the beach masterplan and support the message that Aberdeen is ambitious, forward thinking and open for investment.

3.6 Aberdeen Local Development Plan, 2017

The current Aberdeen Local Development Plan (LDP) was ratified in 2017. In terms of key policies, the 'Developed Coastline' and Policy NE7 is of strategic importance. The site is part of Aberdeen's coastline and is zoned as a developed coastline with an associated policy context that suggests only that developed (as opposed to underdeveloped) coastline is the area where development has been concentrated and where future coastal development may be considered.

In addition, the LDP has a policy for 'Urban Greenspace' (Policy NE3) and this indicates a presumption against the loss of areas of urban greenspace to development but ***allows for recreational and sport use as an exception to the wider development restriction***. It is not clear if this includes or excludes tourism but it is known that the Aberdeen Beach Masterplan is proposing substantial development projects in this 'Urban Greenspace'.

The proposals can play a major role in realising the LDP vision, notably around the Beach area, and directly support a range of the LDP policies.

- In line with the emerging Beach Masterplan
- In line with economic development strategies (national, regional and local)
- Locationally appropriate with good transport connections to surrounding leisure facilities, tourist attractions and public transport
- Underused site, with wildlife value potentially better located elsewhere
- Supports tourism in Aberdeen
- Substantial economic investment with direct and indirect benefits to the city
- Job creation / support for local services, shops, restaurants and the city centre
- Located in the 'Developed Coastline', which is 'already a focus of economic or recreational activity and is likely to be developed further'

Proposals for new sport and tourism related developments, and the expansion of existing facilities, will be supported where it can be demonstrated that they have a clear net economic and social benefit and allow a new market to be exploited, or extend the tourism and community appeal of the area. Proposals for new community sports related developments are therefore addressed in this independent economic assessment. It should be noted that ACC is in the process of developing and replacing the ACC LDP 2017 with an LDP 2022. The proposed development should take cognisance of any new policy which support sport, leisure, tourism and community proposals in this location.

3.7 Aberdeen Beach Development Framework and Masterplan, 2021

ACC is currently developing and consulting on plans to regenerate Aberdeen beach and is in the process of ratifying a Beach Masterplan and associated development framework. This is estimated to be a £150m investment to transform the beach area.

The Aberdeen Beach Masterplan offers an exciting opportunity to re-imagine the beach and create a unique and innovative new waterfront destination which connects back into the centre of the City. At the heart of the Masterplan is the sports stadium and facilities alongside redevelopment of the iconic Beach Ballroom – a ‘jewel in the crown’ of the beach.

The creation of a transformational new beach destination will rely on progressive and innovative Masterplan solutions, alongside a respectful acknowledgement of the heritage of the site.

A number of high-level opportunities have been identified which capture initial creative thinking and design ideas to be developed following the Design Team Collaboration Workshop, these are summarised below:

- A dominating desire route from Beach Boulevard to the enhanced Ballroom/stadium/leisure offer – ‘The Avenue’
- Celebration of arrival to the beach/links
- Enhanced setting for the iconic Beach Ballroom
- Creation of a formal public plaza and grand entrance to the Ballroom
- Integrated stadium/leisure complex with active frontage to the Beach Esplanade
- Podium deck connecting ballroom/leisure/stadium elements with enhanced public realm
- A people-focused, pedestrian and cycle-friendly external shared surface
- Potential public amphitheatre
- Re-imagined play park with potential for water play
- Large capacity outdoor events zone
- Potential landforms providing shelter from the elements
- Consideration of integrated coastal defence opportunities
- Potential feature pier structure and focal point
- New enhanced cricket pitch and multi-use sports fields
- Potential redevelopment of industrial units on Beach Boulevard
- Structure planting/screening opportunities
- Complements city centre public realm concept for Castlegate as a ‘Gateway to the Beach’
- Extension of Castlegate/enhanced public realm towards roundabout/potential new civic space/possible cableway public transport option and tourist attraction
- Extension of enhanced beach park up Beach Boulevard towards city centre

There is no doubting the ambitious scale and scope of these emerging proposals. They are akin to other waterfront regeneration achieved in other cities, such as Dundee and Glasgow in Scotland and other UK cities such as Newcastle, Manchester and Liverpool. There is a need to better utilise Aberdeen’s coastline and better connect it to the city centre. This is supported by the ‘Developed Coastline’ policy in the LDP.

Sports stadiums are known to play a critical and catalytic role in helping deliver ambitious regeneration schemes, and this report sets out a number of case studies, where public funding and support for new sport facilities has had a demonstrable positive socio-economic effect on neighbouring communities.

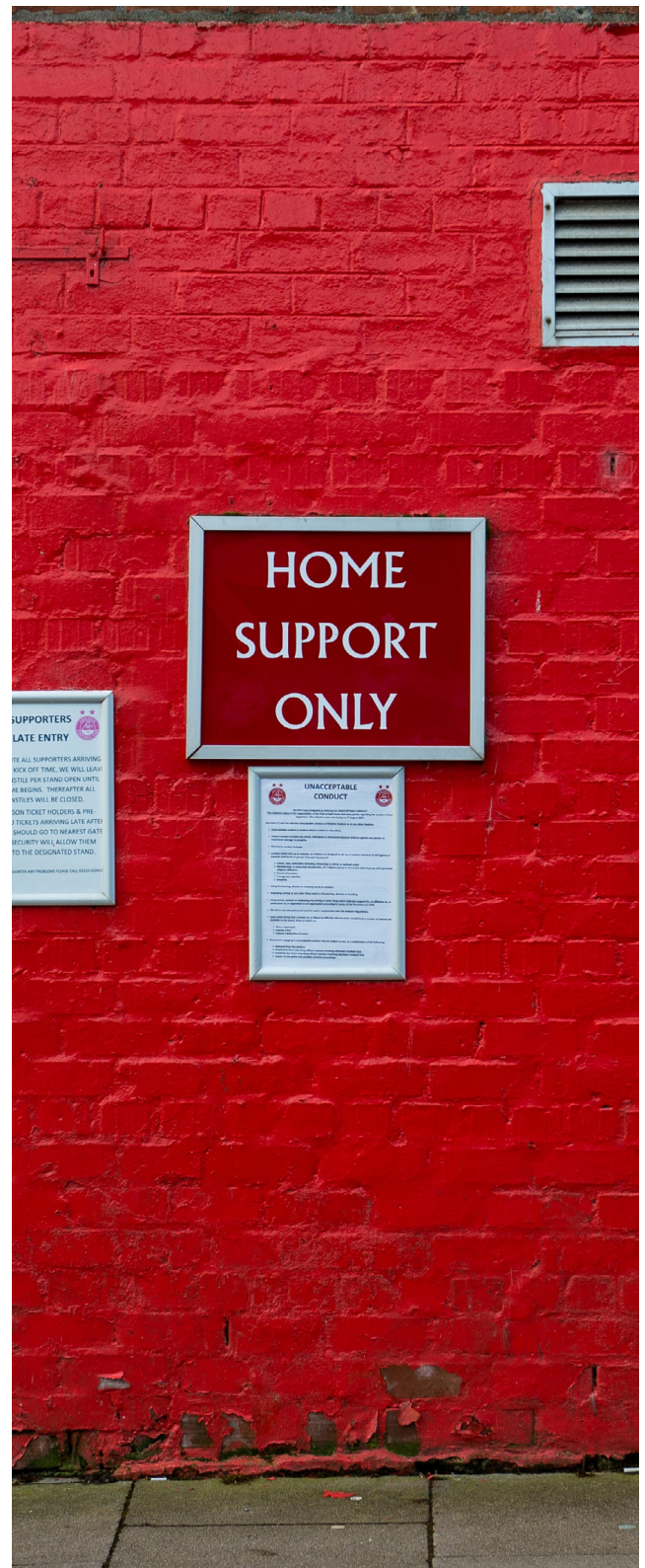
3.8 Aberdeen City and Shire Economic Strategy, 2015

A partnership including Aberdeenshire Council, Aberdeen City Council, ONE and business organisations published a new Regional Economic Strategy in 2015. The strategic context for the strategy was developed at a challenging time for the economy of the North East of Scotland including the downturn in the oil and gas sector due to a downward trend in oil prices and cost pressures, the backdrop of cuts in public sector expenditure and recovery from the wider economic downturn.

A key element of the strategy is to invest in infrastructure that caters for the needs of a high performing international city region economy and a growing rural hinterland – roads with capacity to cope with the demands of business; extensive air and sea links, digital connectivity to develop competitive business, and a competitive and accessible public transport system.

Although there is a focus on the hugely important energy sector, the strategy seeks to capitalise on the region's other existing strengths and support a broadening of the economy across other industries – within the energy sector itself, tourism, food, drink, fisheries and agriculture, creative industries and life sciences.

The refreshed strategy seeks to support business growth, notably in key sectors, and to encourage investment in new developments and infrastructure. The strategy identifies the key employment sectors for Aberdeen City and Shire, which includes tourism. The strategy outlines how the tourism sector is home to 1,200 related companies and supports 20,000 jobs, around one in ten of Scottish tourism jobs. In 2014 1.48m tourists visited the region, with an estimated expenditure of over £400m. The exceptional performance of the business tourism market had, at the time, put substantial pressure on overnight accommodation in the region. Subsequent events have turned this weakness into an opportunity to promote and accommodate more leisure visitors. To achieve this, we need to provide enhanced offer and attractions.



The proposed development will provide new sporting and tourism facilities and support the destination credentials of the regional economic strategy.

In turn it will create new employment and business growth opportunities.

3.9 North East Scotland Economic Strategy Statement in Response to Covid-19, 2020

The context in which the economy is supported within Aberdeen has changed. This is reflected in the policy statements and objectives set out within the North East Scotland Regional Economic Strategy Statement published in July 2020. The statement was developed in light of the Covid-19 pandemic and to help update and guide the Aberdeen City Region Deal activity, which is one of the key delivery mechanisms for the region's economic vision.

Aberdeen City and Aberdeenshire councils and local leaders, together with the UK and Scottish Governments, are working to address the challenges currently facing the region and to capitalise on the substantial opportunities.

Up to 2026, both Governments are committed to jointly investing up to £250m. Aberdeen City Council and Aberdeenshire Council and regional partners are committed to investing up to £44m. These commitments form part of an overarching £936m funding package for the Aberdeen City Region Deal.

The City Region Deal and Economic Strategy Statement provide guiding principles of ensuring quality development, supporting delivery of strategic growth areas and of ensuring a 'thriving visitor economy that plays to the strengths of the North east'. Spatially, it is also clear that the Aberdeen City and Shire Strategic Development Plan (approved by Scottish Ministers in August 2020), is in alignment, stating: ***'economic diversification and growth is needed to meet local needs, with tourist related developments having an important role to play'***.



The economic opportunity afforded by the Aberdeen City Region Deal and refreshed Economic Strategy is an important delivery mechanism for the region to 2026 and beyond. The proposed development can support the ambition of making Aberdeen City region a 'City Region of Choice'. To do this we have to embrace best practice from elsewhere to inform our next phase of projects. The City Region Deal model has demonstrated that initial public funding can be returned many times over by resultant private sector investment.

3.10 Aberdeen Economic Policy Panel Report, 2021

The most recent annual Aberdeen Economic Policy Panel Report was issued in December 2021 and provides an economic policy update in response to the challenging current environment.

In keeping with the new National Strategy for Economic Transformation, and as stated in the Regional Economic Strategy, there is a critical requirement for the North East and Aberdeen to diversify away from oil and gas towards alternative clean energy sources and other sectors of the economy which the North East has the potential to perform strongly in.

Tourism is seen as one of these areas, and the latest Economic Policy Panel sets out a series of recommendations to achieve growth in this key sector, these being:

- The vision for Aberdeen tourism is to turn itself into an attractive city for cultural breaks and a gateway to a wider region which offers a high-quality outdoor experience.
- As part of efforts to diversify the economy, the Panel has noted the increased focus on short-term leisure tourism.
- The sector is important as it offers a significant number of employment opportunities, with positive spill over into other sectors such as retail and transport.
- Actions designed to help mitigate these challenges over the past 12 months have included targeted domestic marketing initiatives, ongoing bid activity for business events and tour operator contracts, a recovery programme delivered by VisitAberdeenshire for local businesses and skills initiatives.

- Looking ahead, the North East Adventure Tourism (NEAT) initiative, led by Opportunity North East is an example of regional innovation to support the region's growing adventure tourism sector. Within Aberdeen, the unveiling of Union Terrace Gardens in 2022 and the ambition within the City Centre Masterplan aims to provide more reasons to visit the city.
- The Panel has recognised this from the outset. In 2018, the Panel endorsed the overall approach of the Regional Economic Strategy in particular the focus on raising productivity outside of the oil and gas sector. In 2020, the Panel recommended an enhanced approach to diversification which builds on the sectoral approach already identified but looks to go further and faster in establishing a wider range of economic activities in the region.
- Despite recent challenges, the Panel continues to believe that the growth of a high quality and diversified leisure tourism sector presents an important economic opportunity for the North East. The region will, however, need to be flexible to new trends in visitor demand post-pandemic both here in the UK and internationally.
- Visit Aberdeenshire's planned reassessment of the regional tourism strategy in early 2022 is welcome and will help to identify best prospect markets and reconfirm the regions' competitive strengths.

Sport and sport tourism is recognised in local, regional and national economic strategies as a key sector and one which can bring long term economic value to the area as part of our diversification strategy.

The proposed development will support this vision, notably in broadening the appeal of the city to leisure visitors who are increasingly seeking activity and adventure-based experiences and sports tourism.

3.11 The National Tourism Strategy, 2020 - 2030

Scotland's national tourism strategy, developed in partnership between industry, public agencies and the Scottish Government was launched in March 2020 just prior to the first lockdown. Scotland Outlook 2030 outlines a bold new vision for Scotland to be the world leader in 21st century tourism and lays out a set of commitments which will see tourism act positively in the common interest of Scotland's communities, businesses and everyone who visits and stays with us.

Tourism is acknowledged as having a significant role in delivering Scotland's wider economic strategy as it cuts across every sector and touches every part of Scotland's economy. However, the ambition within Outlook 2030 goes beyond that; it looks to enrich the lives of those who live here and visit us; to protect and preserve our places and for Scotland's tourism industry to act as pioneers for delivering responsible tourism.

The national tourism strategy confirms the importance of tourism to Scotland's economy and emphasises the resilience of the sector in recent times. However, it cautions that

Scotland must remain competitive, by developing and changing to retain visitors to prevent losing visitors to other tourism destinations.

Perhaps most importantly it sets out a framework for how the tourism sector can recover from the devastating effects of the Covid-19 pandemic, and that all development and investments will play a role in achieving this ambitious vision.

A Tourism Development Plan for Scotland has been developed to set out the framework to assist and promote growth in Scotland's visitor economy. It supports the national tourism strategy by the Scottish Tourism Alliance. The Tourism Development Plan for Scotland sets out a much broader development strategy and proposals across a wider agenda, highlighting the important role played by local partners, notably Area Tourism Partnerships and local authorities.



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The proposal plays into the national strategy by creating infrastructure that will encourage greater footfall and importantly higher spend and longer dwell times than currently.

3.12 Destination Aberdeen and Aberdeenshire Strategy 2018 - 2023

The regional tourism strategy was launched in 2018 and replaced the 2013 strategy when the region's economy was in a different place. Since 2013 considerable investment was made in some major infrastructure which presented an opportunity for the tourism industry to grow in an unprecedented way. Changing trends in consumer demand have opened up new opportunities for the region. Therefore, the new strategy sets out a framework for everyone in the region's tourism sector to plan around these new opportunities and build on the strengths as a destination. It sets the following mission:

'Together, we will develop the visitor economy to provide a sustainable contribution to the prosperity of North East Scotland'.

The strategy outlined five key principles to support this tourism growth ambition: sustainable growth, leadership, governance, employment and collaboration. Guided by the five principles, the following specific priorities are all aimed at achieving the overall strategy objective to increase annual visitor spend from overnight and day visits to £1bn per annum by 2023:

- **Develop experiences that will attract visitors to explore the full territory of Aberdeen and Aberdeenshire all year round in support of a strong visitor economy.**
- Optimise visibility and distribution of Aberdeen and Aberdeenshire's tourism experiences through online and offline distribution channels.

- Focus on transport connectivity to Aberdeen and Aberdeenshire from its key inbound markets, and around the destination.
- Build digital connectivity to ensure that visitors can navigate freely around Aberdeen and Aberdeenshire and connect easily with tourism suppliers.
- Achieve optimal use of Aberdeen's accommodation resources.
- Ensure that destination development in Aberdeen and Aberdeenshire is consistently aimed towards protecting and enhancing the area's environment, economy and society.
- Create a regulatory environment that promotes the growth of the visitor economy and a fair-trading environment for all;
- Raise the quality of employment in tourism and its attractiveness as a career.

There is a focus on six key markets (events, cruise, golf/sports, culture and heritage, food and drink and touring), and the strategy outlines the important action of working with tourism businesses to raise awareness of the value of six sectors and resulting business opportunities, particularly around group activities.

NB An updated and revised strategy is pending reflecting recent events but the core principles remain.

The creation of a new stadium as part of the beach transformation will deliver regular major events supporting the ambition for new assets to meet the needs of ever-discerning residents and visitors, enabling Aberdeen to compete with other UK, EU and global destinations. Investing in related infrastructure is a core component of the current tourism strategy.

3.13 Active Scotland Delivery Plan 2018

The Scottish Government has set a vision of 'a Scotland where more people are more active, more often'. The delivery plan is informed by cross-cutting guiding principles, which align with the agenda set out in the WHO Global Action Plan on Physical Activity and with United Nations Sustainable Development Goals. They are consistent with the Scottish Government's Programme for Scotland, to make Scotland an inclusive, fair, prosperous, innovative country, which is ready and willing to embrace the future.

The principles bring together international thinking on what is required to realise the major contributions physical activity and sport can make to transforming people's lives.

The delivery plan is based on six outcomes, and most pertinent to the proposed development is Outcome Four: **'We improve our active infrastructure - people and places'. This seeks to ensure that sports facilities support and encourage people to participate by:**

- Investing in the development of new facilities and upgrading or extending existing facilities
- Delivering regional sports centres around the country with a mixture of facilities for both community and performance use
- Investing in facilities to support major sporting events
- Requiring applicants to the Sports Facilities Fund to demonstrate that they have involved their community in the decision-making stages of their proposals
- Prioritising investment from the Sport Facilities Fund into projects that provide opportunities for people to get involved in sport and physical activity, who share protected characteristics that are under-represented in sport or are located in or serve the most deprived areas of Scotland
- Developing facilities design guidance that supports clubs, community groups and others to design and deliver inclusive sports facilities
- Protecting and improving the quality and capacity of playing fields and pitches as part of the statutory planning process
- Building partnerships to increase the extent to which leisure and school sports infrastructure is affordable, available and open



The proposed development directly supports this ambition to develop and improve sports infrastructure, and achieving this through partnerships between local, regional and national organisations. The delivery plan seeks to foster collaboration across and between stakeholders to ensure a comprehensive and integrated approach guided by a shared vision of the value of a more active Scotland.

3.14 Sport Aberdeen

Sport Aberdeen is an award-winning registered charity committed to creating opportunities, inspiring people and changing lives through sport and physical activity. Established in 2010, it manages and delivers a diverse range of physical activity and sports services on behalf of Aberdeen City Council and other partners.

The foundations of Sport Aberdeen were built upon the simple goal of getting more people active regardless of age, gender or ability. Strategically forged partnerships with public and private sector bodies help to ensure a community focus is at the forefront of their activities, with emphasis on addressing the needs of a diverse range of people in Aberdeen, particularly those in hard to reach areas and those who are often faced with barriers to participation.

Sport Aberdeen differs from many other sport and leisure providers, as all profit is reinvested back into its communities. With over 500 employees, 30+ venues and two million customer visits each year (pre-2020), Sport Aberdeen is the largest sport and leisure provider in the region.

The existing leisure facility includes the beach leisure centre which has a pools complex and the Ice Arena currently tenanted by Aberdeen Lynx. This hosts: skating tuition, public sessions, parent and toddler sessions, figure skating, synchronised skating and three different ice hockey clubs. It can currently seat over 1,000 visitors. Given the current usage and tenancy of the venue it is strategically important to maintain an ice rink as part of the beachfront development with potential to further improve commercial performance via the provision of a second ice pad – permanent or artificial – to increase capacity for casual use. This would allow greater flexibility of the rink to facilitate different seating to rink ratios and therefore increase varied revenue streams.

The evidence suggests there is potential market demand for new and improved leisure uses in Aberdeen which, together with wider development and infrastructure, will unlock growth in tourism and support the local economy, as well as increase city centre footfall and revitalise local assets such as the Beach Ballroom and the Beach Leisure Centre

All of Sport Aberdeen's work is formed through a focused approach, underpinned by five core objectives: participation, places, partnerships, people and communities and process. People and communities are the driving force informing all that they do, with the key goal of getting more people active in Aberdeen.

Their goal is simple: ***'we want to get more people active and believe that everyone should have the opportunity to take part in sport and physical activity'***.



The proposed development complements the overall objectives of Sport Aberdeen and should be developed in such a way as to enhance and not limit its reach and activities. The design phase should call on the expertise of their team as there are clear linkages and opportunities for collaboration during the development process, to ensure the overall goal of 'getting more people active'.



ECONOMIC CASE



4.1 Introduction

This section outlines the market rationale for the proposed development of the new stadium and community sports provision and pays particular attention to the associated economic impacts. It also sets out the wider, harder to measure, longer term and less tangible benefits of the proposals. The impacts are presented as Full Time Equivalent (FTE) and Person Year Equivalent (PYE) employment impacts, salary impacts and Gross Value Added (GVA) impacts.

4.2 On-site operational impacts

Employment impacts are based on data provided by AFC, with figures supplied for current full time and part time posts, excluding the playing squad. It should be noted that as the development proposals are at an early stage we have taken conservative estimates of the impacts and upsides. The existing jobs are noted as safeguarded jobs, as in the absence of the proposed development there is a risk that some of these posts would be at risk if the club fails to realise its potential.

The data covers existing and future full-time jobs, part-time jobs and 'ad-hoc' or seasonal and hospitality staff. Part-time jobs have been halved to calculate Full Time Equivalent (FTE) posts, and ad-hoc staff have been assumed at 0.1 FTE. This analysis suggests the club currently employs in the region of 163 FTEs. As a result of the proposed development the club envisages that within three years of opening a new stadium the staff complement will increase by around 10% to 15%, resulting in an employment impact of between 180 FTEs and 190 FTEs approximately, a mid-point of 185 FTEs is a prudent estimate.

Utilising salary information from the Scottish Annual Business Statistics (2019), where the average salary for 'Support Services' in Aberdeen is £27,838 per annum, this results

in a gross salary effect of £5.15m. This is a conservative estimate as it excludes playing staff salaries and draws on publicly available statistics and not those derived from AFC.

In terms of the GVA effect, the assessment has utilised GVA per head figures from the Scottish Annual Business Statistics (2019), where the average GVA per head in Aberdeen for 'Support Services' is £65,816 per annum, this results in a gross GVA effect of £12.18m.

At this stage of the proposed development these gross figures have not been converted to net impacts (which would be reduced due to potential displacement effects but also added to in terms of their wider supply chain and multiplier effects). Very often these displacement deductions and multiplier additions cancel one another off, and therefore the gross impacts (in terms of jobs, salaries and GVA) effects should be seen as early-stage indications of the scale of on-site operation effects, summarised as:

- 163 jobs safeguarded and 22 created
- £5.15m salary effects per annum
- £12.18m GVA effects per annum

4.3 Off-site operational impacts

Supporters attending matches and people who attend events and functions at the stadium will spend money in the local area, primarily on local retail, leisure sector - pubs, restaurants - accommodation, and transport.

Based on previous research undertaken on the average spend of Scottish football fans on match days as part of the Scotland Football Survey (2013), we estimate that the average match day expenditure of fans travelling to the stadium by car will be £10 and those travelling by other means will be £25, reflecting an increased spend beyond the ticket price that includes travel costs, food, and pre-match entertainment. The above spend assumption have been inflated to £11.50 and £28.50 respectively to reflect 2021/22 prices¹.

Research by AFC in 2017 noted that approximately half of the visitors arrive by car and the other half by other forms of transport, including walking, taxis, lifts and public transport.

AFC provided a breakdown of the expected level of annual visitor numbers at the stadium, both in terms of football match days (24 match days across SPFL, Cups and European games) which equates to 360,000 attendees, and non-football events (large scale, medium scale, small scale and lounge/restaurant visits) equating to a further 48,200 visits. In total the new stadium is expected to generate at least 408,200 visits.

Assuming an average off-site spend of £11.50 per head for those visiting by car and £28.50 per head for those attending by other means,

4.4 Construction impacts

In addition to the operational impact of the proposed development there will be short term employment benefits associated with the capital investment in developing and building the new stadium and related activities.

The amount of construction employment provided by the proposed development can be estimated using 'Person Years of Employment' (PYE) derived from the average output per employee in the construction industry in Scotland.

The Scottish Government publishes estimates for turnover per employee for the construction

this would inject a further £8.16m into the city centre/local economy.

Combined, the annual 'off-site' expenditure is £8.16m which will support an additional 32 gross jobs, assuming average expenditure of £254,829 to support one job in Aberdeen (Scottish Annual Business Statistics, 2019)

Utilising salary information from the Scottish Annual Business Statistics (2019), where the average salary for 'Support Services' in Aberdeen is £27,838 per annum, this results in a gross salary effect of £891k.

In terms of the GVA effect, the assessment has utilised GVA per head figures from the Scottish Annual Business Statistics (2019), where the average GVA per head in Aberdeen for 'Support Services' is £65,816 per annum, this results in a gross GVA effect of £2.11m.

An early-stage indication of the scale of off-site operation effects, can be summarised as:

- 32 jobs safeguarded and created
- £891k salary effects per annum
- £2.11m GVA effects per annum

¹<https://www.bankofengland.co.uk/monetary-policy/inflation/inflation-calculator>

sector within the Scottish Annual Business Statistics and the figure for Aberdeen identified is £136,500.

The investment will secure a further 586 Person Years Employment (PYE) posts over the 18-month construction period. In line with Scottish Enterprise guidance, we can assume around 67% of these jobs will benefit regional businesses, equating to 393 PYE.

4.5 Total operational impacts

In total, taking into account both the on-site and off-site economic effects, the proposed development is estimated at this early stage to have the following economic effects:

- Almost 220 FTE jobs safeguarded and created
- Around £6.0m salary effects per annum
- In the region of £14.3m GVA effects per annum
- 586 PYE of construction related work

These are early indications of the scale of the socio-economic opportunity. These should be treated with caution as they are indicative. They should also be seen as conservative estimates of economic impact at ex-ante appraisal stage. They do not include multiplier effects, which are the wider supply chain related benefits as a result of employees spending money on goods and services across the North East.

The economic impact assessment is based on an employment facing appraisal, and the resultant salary and GVA effects of these posts, both onsite and offsite.

A wider and more detailed appraisal of socio-economic benefits will be undertaken as part of the Environmental Impact Assessment and Socio-economic Impact of the wider Beach Masterplan which is currently underway.

It is worth noting at this point, the likely impact on the operations, turnover and contribution to the local economy of Aberdeen Football Club, should they be forced to remain at their current stadium for a lengthy period of time.

The Club's average annual turnover in the period 2014-2019 was £15m.

Notwithstanding the significant effects of the pandemic on operations and income in 2020 and 2021, these levels are under threat going forward should the Club be unable to move to a more modern facility. The three main potential areas are:

- Increasing maintenance and compliance costs of an ageing stadium;
- Reduced income (including from hospitality) due to reduced ability to deliver a contemporary customer experience; and
- The likelihood of reduced income and increased costs as a result of being forced to play home UEFA competition fixtures at neutral venues (most likely in Edinburgh or Glasgow) due to the stadium not meeting the necessary standards to host European football.

The impacts of these could see the Club's financial performance decline significantly by at least £2m per season.

However, with a state-of-the-art new stadium, projections for the Club by a leading stadium consultancy firm, estimate that the new stadium could generate £3m-4m in new income per season above current levels as a result of enhanced facilities.

4.6 Wider economic and regenerative impacts

In addition to the direct and quantifiable economic effects, the proposed development would also catalyse wider benefits and impacts which support the strategic ambitions of Aberdeen City Council and its partners. The economic contribution of the Aberdeen FC's award-winning Community Trust is pertinent here.

The Scottish FA and UEFA commissioned a report in 2018 to uncover the "unique tangible evidence" that participation in football has on the city and region's economic, social and

health benefits. It determined that grassroots football throughout the region has a value of £97m to society. Indeed, for every £1 invested in AFCCT and football participation in the North-east, the Trust delivers a £10 cumulative return in conjunction with its partners.

The combination of the existing programmes run across regional communities, combined with the increased opportunity and capacity that the use of new stadium facilities would allow, will significantly enhance the value of the work they do. **See also section 6**

4.6.1 Catalytic regeneration role

The proposed development can have a catalytic regeneration effect and enhance the delivery of the wider regeneration ambition of the Aberdeen Beach Masterplan. The Beach has perhaps not delivered to its potential in recent decades and should be well known throughout Scotland, the UK and further afield as a unique asset and reason for visiting the city. It is currently home to a range of businesses that are utilised by a range of customers throughout the year. However, there is certainly potential for increasing this significantly if the scheme proceeds as per the plan.

This should be viewed both as a regeneration and placemaking project which will enhance the quality of life of residents and support wider economic as well as social, creative and cultural objectives.

Regeneration projects that have a flagship centrepiece, or signature development, at their heart will unlock private and further public support and unlock wider spin-off benefits as realised in other waterfront locations such as the V&A in Dundee, Pacific Quay in Glasgow and the

Scottish Government Headquarters in Edinburgh. Landmark constructions can unlock further investment and regeneration. For example the Kelpies and Falkirk Wheel turned a piece of Scottish Canals wasteland into an international visitor destination.

There are numerous examples where stadium developments have acted as the catalyst for wider regeneration and place-making as outlined in section 7 of this report. The evidence in this report backs up that the proposed stadium at Aberdeen Beach would have a similar impact to the projects listed above

All of these regeneration projects or programmes have delivered additional / catalytic economics through construction activity, driving greater footfall/usage, retaining and increasing local spend, attracting new visitors to the region and creating new businesses and jobs in the locality.

It is estimated that 38million visitors would be attracted to the beach area over a 50 year period based on a new stadium facility being sited there.

	Games / Events	Average Attendance	Total Attendance
AFC Men's First Team	23	16,000	368,000
AFC Women's First Team	8	12,000	96,000
Scotland U21 Internationals	4	16,000	64,000
Scotland Woman's Internationals	4	16,000	64,000
Rugby	8	16,000	128,000
Music Concert	1	8,000	8,000
Non-matchday events	158	150	23,700
Annual Attendance			751,700
x 50 years			37,585,000

4.6.2 Perception benefits attracting new investment

Proceeding with the development will add to the perception of Aberdeen as a place that is ambitious, forward-thinking and open to new investment. The 'wow' factor around the Beach Masterplan will send a positive message to the investment market that Aberdeen is open for business.

4.6.4 Business and job creation

The proposals will support the growth of existing local companies and stimulate the formation of new enterprises. In turn this will help broaden the city's economic base through supply chain benefits, wider commercial opportunities and ultimately increase corporation and non-domestic taxation revenues.

4.6.3 Growing our visitor economy

The scheme has the potential to attract new and repeat visitors from a range of locations with differing interests to the area and massively enhance the tourism appeal of the area.

The development will act as a destination in its own right and help support the local tourism strategy by providing a reason for visitors to come more frequently, stay longer at the Beach and in Aberdeen city leading to increased spend on entrance fees, souvenirs, food & drink, event tickets and services.





COMMERCIAL, FINANCIAL AND MANAGEMENT CASE



ES

5.1 Introduction

In line with the HM Treasury Five Business Case Model, the Strategic Case has to take cognisance of the commercial case, financial case and management case prior to more detailed assessment at the outline business case stage. These are introduced in this section.

Business cases can be broken down into five aspects which are interconnected but distinct. The business case should enable stakeholders to ascertain that the proposals:

- Are supported by a robust case for change – the Strategic case
- Optimise value for money – the Economic case
- Are commercially viable – the Commercial case
- Are financially affordable – the Financial case
- Can be delivered to specification and on time – the Management case

5.2 Commercial case

Aberdeen FC operates from a 119-year-old stadium that can no longer provide the opportunity to drive increased revenues or deliver the right matchday experience in keeping with fan expectations. The ageing stadium also carries significant ongoing annual maintenance and high utility costs, making it unsustainable for the Club.

A new sustainable stadium, with flexible and creative spaces for community activities, a range of contemporary hospitality areas and fan zones, will drive increased revenue, significantly enhance the matchday experience and provide a 365 days a year facility for community use in a central location close to the city centre.

The age of the stadium and facilities available are of further concern in respect of non-compliance with European (UEFA) football requirements. With regular success in qualifying for European competition (Europa League / Europa Conference League) there is a genuine risk of the Club not being able to meet the strict requirements set by Europe's governing body. The Club has been fortunate to benefit from a series of exemptions in recent years, but requirements are constantly under review and were the Club not able to meet the necessary standards set by UEFA, matches would get switched to an alternative venue that does meet the standards, probably in excess of 100 miles away.

A modern and iconic stadium at the beach will not only help to drive the Club's own non-matchday revenues, but as the anchor tenant at the development, the stadium presence will enhance the wider beach location, drive football and support the broader aims of the Council's regeneration plans.

5.3 Financial case

The stadium funding plan is being developed by the project partners in tandem with the overall business case, but key agreed cornerstones of this plan include the sale of the Pittodrie site, investment by Aberdeen City Council in shared areas, stadium naming rights income and equity investment from existing and new shareholder groups.

Other possible options include Council support by way of a long-term community lease, available loans and grants (the carbon neutral facility and Levelling Up funding) and fan bond schemes.

There is a role for public support in the form of facilitating the development, this is already underway in the form of leading the master-planning process. The delivery of key components of the masterplan will require an element of public funding, on those items which are deemed as 'public goods' such as roads and infrastructure, as well as inputting to community elements for the proposals. This investment will allow the development to proceed and in turn will play a catalytic role in encouraging patronage and footfall, and thereby creating the conditions for further investment in the beach.



5.4 Management case

Aberdeen FC and Aberdeen City Council are currently reviewing activities and a series of proposed operating models to ensure that match day and non-matchday activities at the stadium are complementary to those at the redeveloped Beach Ballroom and vice-versa making the most of economies of scale efficiencies.

Initial indications that only a limited number of competitive offerings exist are positive (and where there are, they are typically of a different scale). The parties will continue to review potential operating models.

It is envisaged that the Leisure Centre, due to its community role and objectives, will continue to be operated by Sport Aberdeen aside from the Aberdeen Lynx ice hockey matches which would be included within the agreed AFC/ACC operating model.

There will be an appropriate structure for delivery and ongoing operation of the development. ACC and AFC would likely contract with each other at 'arm's length' through a sale agreement and a development agreement. The parties will progress the

design of the facility, through the project architects AFL and stadium project consultants Legends. Detailed costing of the works will be progressed in tandem, to include:

- A review of stadium design elements to ensure key Capex spend is being invested to ensure best return.
- Clarity around key infrastructure (including AFC car parking requirements) and transport strategy.

ACC will procure the construction of the facility. It is to be decided whether the construction procurement will be design & build or traditional, however, it is expected that a single main contractor will be employed by ACC to construct all works packages. AFC will need to be satisfied with the procurement specification and methodology, and AFC's surveyor will have all monitoring and approval rights over the construction works, plus AFC will have rights to shadow and check the design and build at all stages.





COMMUNITY BENEFITS



6



6. Community benefits

A new, purpose-built stadium with larger, flexible spaces, linked to community sports and leisure facilities, including an ice arena, will bring wider socio-economic benefits.

This includes greater participation in sport among citizens, with the knock-on positive impact on health and well-being; profile for the region through the attraction of a wider programme of national and international sporting events; and stronger communities through improved access and inclusion.

Clearly, greater promotion of sport is an obvious outcome of the synergy between facilities operated by Sport Aberdeen at the beach and the Club. While this would include football, it would also encompass ice-skating and ice hockey as well as water sports and potentially skate boarding and climbing, with a focus on making all sports and related activities fully inclusive.

Professional sport

The new facilities at the beach provide the opportunity to position Aberdeen as a leading promoter of professional sport, and women's sports in particular.

Women's football is the world's fastest growing sport which, through greater profile, is inspiring young girls towards a career in professional football that was unthinkable for most over a decade ago.

Securing the SFA Scottish Women's Cup Final at the new facility is a key aspiration. Clearly this would require agreement with the SFA but a new facility with a zero footprint in the North East would be highly appealing for the sport's governing bodies. Indeed, becoming the home for female internationalists, with their own distinct brand and identity, would position Aberdeen at the forefront of the women's game.

At present the majority of international football is only played in Glasgow. This means the opportunity to watch international games is exclusive and does not promote the game to the same extent across Scotland's communities.

This focus on inclusion would be at the heart of a programme to position Aberdeen as a host for women's sporting events which could include:

- Women's World Curling final
- Women's Scottish Ice Skating Championship

- Women's Scotland International Games
- Women's ice hockey event

Additionally, the Club has stated its intention to secure men's international football games, specifically those games classed as B-level.

This programme would be the anchor to secure other international events which would bring additional income, visitors and profile through media coverage to the region such as:

- International Rugby Union
- Men's Curling Championship
- World Curling Championship
- Home of Men's ice hockey club

The beach development provides a unique opportunity to provide a new Aberdeen backdrop for start/finish of future events with use of the stadium and facilities for spectators, sponsors, event management, media and VIPs.

In addition to exploring musical and other performances within the stadium at the start or finish of major events such as the highly success Tour of Britain, there is also the opportunity to establish recognised cycle and running routes in and around Aberdeen from the beach, including a city-based half marathon or full marathon as well as a safe and central short cross-country route around Broadhill and the environs as a taster or for leisure and training purposes.

There are currently no Triathlon Scotland events based in Aberdeen despite hundreds of these types of events taking place up and down the country each year. The beach front could be a central point for this with access to a network of roads, cycleways and pathways with stunning views for running and cycling and access to the North Sea for swimming.

All of these present the opportunity to highlight active travel which promotes healthier lifestyles and lower levels of emissions.

Local sports programming

This national and international programme would be the catalyst for stimulating and enhancing local sports programming, leveraging the powerful and influential Aberdeen FC brand. This could include:

- Education on healthy eating and mental well-being to primary and secondary school children

The catalytic impact of a community sports stadium as the anchor project in the Aberdeen Beach Masterplan

- Primary and Secondary football “cup final” type events to be hosted within the arena for both girls and boys
- Primary and Secondary rugby “cup final” type events to be hosted within the arena for both girls and boys
- Training sessions for children with the AFC women’s and men’s teams
- Teaching children how to be a coach
- Teaching children how to referee matches

A summer programme of sport could be delivered for children to harness their potential, provide them with active activities and events, building on the feedback received from children during the consultation about what they wanted at the beach. This would include exploring the potential to offer free swimming, water sports – including windsurfing and paddle boarding, ice skating and ice hockey, cycling, skate boarding and rollerblading clubs as part of the beach “Pump Park” during the summer months.

Health and Wellbeing

Within the beach masterplan, there is a desire to improve open spaces, active travel, sports and leisure facilities for the benefit of all citizens and visitors, promoting healthy, active lives which lead to positive changes in health and wellbeing.

Enhanced public realm and outdoor green space, along with leisure and sports facilities, will not only impact on mental and physical health and wellbeing but also provide opportunities for play and socialising and support increased levels of active travel such as walking and cycling which promotes healthier lifestyles and reduces carbon emissions.

The beach stadium, as the anchor point for the wider regeneration, would benefit the population by making wellbeing and leisure facilities easily accessible, widely publicised and free at the point of access.

Football at the heart of our community, driving positive social change and well-being.

There is no denying that football cuts across society and touches the lives of citizens from all backgrounds, genders and ethnicities.

Football is a common passion shared by those in poverty, but also by those who have the resources to make a significant difference, such as Marcus Rashford, who influenced a Government U-turn and whose initiatives are helping to tackle child poverty and now literacy.

Creating true social change through football requires all parts of the football world – players,



coaches, staff, fans, grassroots clubs, along with sponsors, corporates and partners cooperating and collaborating with stakeholders in education, health and social care.

The powerful combination of Aberdeen Football Club, AFC Community Trust (AFCCT) and their loyal supporters, the Red Army can be a compelling force for good in the region. The Club, more than any other organisation locally, can tap into those hard-to-reach audiences, as evidenced by its NHS vaccine campaign, and support key economic indicators such as city region promotion, education and employment, social inclusion, diversity and health and wellbeing.

Indeed, on the back of the Club's successful #StillStandingFree campaign, which supported thousands of people through lockdown, and the myriad of initiatives and programmes managed by the Trust and the Club, it's clear that football can drive meaningful social and economic change.

Through the power of the AFC brand and the passion for football, the Club and its Trust can draw attention to and help address deep-rooted issues in society.

A new stadium as an anchor for the regeneration of the beachfront would mean that the Club,

along with its Trust, would be physically at the heart of its community as well as metaphorically.

The impact of this new sea-facing stadium along with a Club, which is recognised as an inspirational force for good and embraced by all stakeholders across the region, could be transformational to the fortunes of our city and its citizens.

That force for good could become a vehicle for delivering wider programmes on behalf of Aberdeen City Council and other current providers of education, social care, and health services.

New, flexible spaces for great return on investment

Innovative spaces in the stadium, linked to the community facilities as part of the complex could host a broader range of programmes and activities, run by the Trust with the support of the Club to drive change and deliver even greater socio-economic benefits to the city region while offering greater value to the public purse.

To date the Trust has delivered its work within the constraints of the existing infrastructure at Pittodrie Stadium. Other than an office, there is no dedicated AFCCT space at Pittodrie, and most





activities are hosted in corporate entertaining lounges and the Richard Donald Stand concourse. Given the differing needs of participants this leads to sub optimal facilities e.g. gym training sessions for the elderly within the RDS are held in cold temperatures.

The new stadium at the beach affords the opportunity to create a venue that is open to all and used by the wider community throughout the week and not simply on match days. The Trust could play a pivotal role in supporting the community by offering a range of programming that would use the facilities available in the leisure centre along with dedicated spaces within the stadium. A prominent physical presence within the stadium would provide a safe focal point for people to interact and socialise as well as accessing wide-ranging programmes from education and employability through to support for both physical and mental wellbeing initiatives.

It is projected that, at least, 6,250m² of available space could be used within the stadium. These spaces range from the media theatre, lounges and concourse areas, in addition to a prominent Trust area which would function as a focal entry point for community activity.

Consideration could also be given to multi-purpose use of iconic spaces like the dressing room. The ability to offer programming, for example, education within such areas would heighten engagement and provide a unique proposition in the area. Evidence from other clubs e.g. Brentford FC and NAC Breda shows that this combination can work successfully.

The Trust would seek to build upon its existing strong volunteer support base by offering opportunities for the community to support their community. Empowering people to foster peer to peer support ensures that the community has a voice in the services and programmes it requires.

The new stadium would enable youth focussed community interventions in the evenings and offer young people a safe environment with positive role models and activities which would help to reduce crime and anti-social behaviour in the area.

Ideally an outdoor 4G Cruyff Court facility would provide a welcome space to engage in healthy pursuits as part of this programming.

The Trust has the ambition to increase its activities in education and employability. While much of its education work will continue to take place in schools, a dedicated stadium education

space would enable the Trust to build capacity around particular areas of the curriculum, e.g. STEM programmes.

Such provision would further lend itself to employability programmes such as the “Kick off your career” programme, supported by the SPFL Trust which works with the Department of Work and Pensions to help young unemployed people to gain the skills to enter the workforce.

The Trust plays a key role in providing active ageing programmes that support a range of initiatives to support physical and mental wellbeing e.g. Healthy walks, Walking Football, Football Memories. All of these activities are dementia friendly, inclusive and open to all.

A new facility would enable the Trust to significantly increase the range of programmes it could offer, in partnership with other providers, to address the needs of the wider community. It already has numerous examples of doing this successfully e.g. working with SAMH (Scottish Association for Mental Health) to deliver the Changing Room – a programme focused on men’s mental health.

Exceptional, purpose-built facilities would enable additional, much needed, initiatives to be delivered by a combination of council agencies,

partners and AFCCT that could address other societal needs, e.g. equality/diversity; anti-racism; assimilation of asylum seekers; veterans.

Football heritage

Aberdeen FC holds a wide range of artefacts which are curated through the AFC Heritage Trust. Consideration could be given to a permanent display area which could be co-located with AFCCT augmenting educational programming and providing interesting content/ events for all audiences. By rotating the collection, it could also form part of a focal point of stadium tours; exhibitions and talks that could lend themselves to the tourism industry

Aberdeen FC and its Community Trust

Aberdeen Football Club has been an integral part of the City of Aberdeen and the surrounding region since it was founded in 1903. The Club touches the lives of individuals and communities across the region and beyond. With a reach of over 150,000 people from all walks of life, the Club is a highly influential institution.

Its successful AberDNA membership scheme boasts 6,500 members locally, nationally and internationally. In 2020, the Club introduced AberDNA Junior – a free membership for every



child under-12 in the region. As a DNA junior member, young children are encouraged to get involved in the Club and, through their free tickets as part of membership, are able to access top-flight football, regardless of their financial or other circumstances.

Recognising the significance of its unique role at the heart of the city region, the Club understood the need for dedicated resources to provide focused support in the community and established the AFC Community Trust in 2014.

Since then, it has seen a rapid rise in its activities and profile which has been recognised at the highest level, including the UEFA Best Grass Roots Football Club accolade in 2019/20 and the Queens Award (2019). The extensive and wide-ranging activities of the Trust have achieved over one million participations since its establishment.

The Trust's mission is to provide support and opportunity to change lives for the better. It delivers programming in three areas: education, football & healthy communities.

Education

The Trust uses the love of football and the passion for AFC to create a unique engagement with children and young people, aimed at closing the poverty attainment gap.

Working in over 30 schools across the region, it supports youngsters across primary and secondary age groups to maximise their potential through physical and mental wellbeing. In addition to physical activity, the Trust uses innovative approaches to the curriculum in numeracy, literacy and through to STEM subjects. Increasingly, it is involved in mental wellbeing through the MINDSET programme which engages with young people aged 11-14, using play-based activities to encourage open dialogue around mental wellbeing and to provide strategies for handling issues and build resilience.

Football

The Trust supports mass participation football activities working with children of all ages to enjoy football coaching, holiday camps and festivals and also provides management of primary school and girls football leagues. The Trust enables youngsters to take part in football and to have access to a complete player pathway, from beginner level all the way to performance sessions. The team of fully qualified, professional staff deliver these sessions across the City and Aberdeenshire.

Community

The Trust's Healthy Communities projects involve a wide variety of participants aged 13-65+. Working to support all age groups in the community from youth work to public health initiatives and from active aging to award-winning dementia friendly activities. Across all its projects AFCCT aims to be inclusive to all and provide equal opportunities.

Socio-economic impact

The Scottish FA and UEFA commissioned a report in 2018 to uncover the "unique tangible evidence" that participation in football has on the city and region's economic, social and health benefits. It determined that grassroots football throughout the region has a value of £97m to society. Indeed, for every £1 invested in AFCCT and football participation in the North-east, the Trust in conjunction with its partners delivers a £10 cumulative return.

Impact report: https://d2cx26qpfwuhvu.cloudfront.net/aberdeenct/wp-content/uploads/2021/04/19093120/ImpactReport_2019-2020.pdf

One of our own" video: <https://www.youtube.com/watch?v=KAWir80ICQQ>





REGENERATION CASE STUDIES





- 1 Aberdeen
- 2 Dundee: Riverside & Camperdown
- 3 Glasgow Waterfront
- 4 Everton
- 5 Manchester
- 6 Arsenal, Tottenham, Brentford, Fulham, Millwall
- 7 Den Haag
- 8 Malmö
- 9 Bradford
- 10 Swansea

7.1 Brentford Community Stadium

What was the situation?

Brentford Football Club was established in 1889 and has played at Griffin Park since 1904. In January 2006, following a period of financial uncertainty, a proposal for relocation was floated.

The Football Club wanted to move from its existing site at Griffin Park to a new purpose-built community stadium at a site in Lionel Road South as they believed they had a much smaller capacity than other clubs in the Championship. The club had played at Griffin Park for over 100 years. Its facilities were antiquated, and the venue couldn't attract a wider crowd. The business lost £5 million a year in 2013 and 2014 and the club's owner contributed funding as equity to meet this gap.

What was the plan?

They set up a new subsidiary company for the development. In June 2014, planning permission was issued by the Council for a new 20,000 seat Brentford Community Stadium and 910 homes (to help fund the stadium) at Lionel Road South. The proposal provided an important opportunity to regenerate a site that has been mainly used as a waste transfer station for many years, and create a thriving new sporting, residential and leisure area, a new bridge connection with Capital Interchange Way and a direct entrance in the Kew Bridge Station. The development would bring a significant change to the area and establish it as a new destination, not just on match days, and improve the general environment and bring a sizeable residential community into the area, supporting existing and new facilities within Brentford. At the heart of that was the creation of a new 'stadium campus' bringing together the development's sports, educational, residential, and commercial uses.

The new stadium was planned to host top level football and rugby matches and be the new home of the Brentford FC Community Sports Trust. Corporate hospitality facilities, range of community and sports uses including an education and training zone, climbing wall, sports centre as well as a local pub was included in the new stadium. Corporate boxes and hospitality lounges were included which the club could also use for conferencing and banqueting activity on non-matchdays.

The club set a number of key objectives as part of its vision:

- New stadium with 20,000 seats to host football and rugby
- A social venue operating 7 days a week
- Base for Community Sports Trust to provide a range of community activities.
- The scheme would assist with wider regeneration, cross-funded by circa 1,000 homes being included in the project- 482 private rental homes & 495 homes for sale through EcoWorld London.

The delivery of the new stadium was to be financed by the sale of surplus land primarily for residential development. The masterplan intended to integrate the stadium into a wider context of physical development and infrastructure and create an attractive, vibrant link between the amenity spaces of the Thames Riverside and Gunnersbury Park. The stadium was a catalyst towards this key connection and would link open spaces with the sports facilities in the park and on the Thames, where the Brentford FC Community Sports Trust runs the Brentford Boating Arch at Kew Bridge.

What happened?

Between 2015 and 2020, Brentford earned around £3.2m per season in match-day revenue at Griffin Park. They expected that figure to rise to £10m a year in their new home, which shows how beneficial the move would be to the club's GVA and financial contribution to the area. The new stadium was projected to cost £71m (excluding land). However, it was part of a larger £250m project that included 910 new homes/apartments, a hotel and retail facilities. The stadium was expected to generate additional local economic and social benefits. The social value of the community activities at that time totalled £8m per year and the club aimed to increase that to £11m+ per year with the new facilities. Construction of the stadium commenced in April 2018. Contractors were Mott Macdonald (value engineering, technical advisory, cost consultancy, civil and structural engineering services), Buckingham Group (principal contractor) and Be Living Ltd (formerly known as Willmott Dixon Residential). Be Living Ltd was the development partner as the financial model depended on other elements of the development. The club put in the land value as part of its contribution and, along with its owner underwrote the balance. Approximately half of the new homes were Build-to-Rent, which were acquired by Invesco Real Estate in 2018 on behalf of one of its international clients in an agreement valued at nearly £400m.



7.2 Dundee. Waterfront transformation, V&A Design Museum and Dundee FC’s proposed new stadium at Camperdown

What was the situation?

The Dundee Waterfront transformation project is one of the largest regeneration schemes in the UK with total value estimated at £1.6bn. At the core of this was the V&A Museum at a cost of £80m.

The ambitious 30-year Dundee Waterfront transformation project aims to reconnect the city with its iconic river/waterfront and integrate the area for the economic and social benefit of all residents. The museum has been widely recognised for its contribution to the repositioning of the city as a great place to live, visit, study and invest. The project is a high-profile collaboration and an innovative founding partnership of the V&A, Dundee City Council, the University of Dundee, Abertay University and Scottish Enterprise with the expectation of attracting further investment into Dundee.

What was the plan?

V&A Dundee was expected to provide a major boost to the local economy, employment, civic pride, and the overall profile of the city as a visitor destination and investment opportunity. Design Dundee Ltd, the charity established to develop and run the V&A, is responsible for the operation of the museum. Dundee City Council made a major financial contribution to the capital project and took responsibility for the construction of the museum in partnership with Design Dundee Ltd. It has been the contracting authority for the capital development period and committed revenue funding and in-kind contributions for 10 years from the point of opening. With a Lease and Maintenance Agreement in place, Dundee City Council is the owner of the building and Design Dundee Ltd is the tenant. The Council continues to play a supportive role in the future of V&A Dundee as the area develops and in driving the development of tourism, business growth and civic pride.

The vision for V&A Dundee is ‘to create an international centre for design, inspiring people and promoting the understanding of design.’

The main objectives of the V&A element of the project were:

- To advance the arts, heritage, culture & science

- To advance education & research
- To advance citizenship & community development
- To attract 500,000 visitors in the first year

Capital Funding Breakdown²:

Scottish Government	£25m
Growth Accelerator Funding	£13m
National Lottery Heritage Fund	£13m
Dundee City Council	£6m
UK Government	£5m
Creative Scotland	£4m
Waterfront Dundee	£4m
Contribution from fundraising campaign	£10m
Total Construction Delivery	£80m

What happened?

The impact of the V&A Dundee exceeded expectations. The museum as a medium-sized enterprise itself has made a significant contribution to the city’s creative and cultural sector as well as being a catalyst for wider economy activity. It provided good value per public pound invested in its early years of operation.

The V&A Dundee has welcomed over 1m visitors since it first opened in September 2018, which were worth £21m to the Dundee economy and £75m to the Scottish economy in its first year alone.

In a relatively short space of time, the V&A Dundee’s performance as a stand-alone enterprise was impressive in its own right but the real success was in the ‘anchor’ role it played in attracting additional investment, not just for the Waterfront regeneration programme but for the city as a whole in Dundee’s culture-led regeneration.³

² V&A Dundee National Lottery Heritage Fund Final Evaluation Report, August 2019, p14

³ V&A Dundee Economic Impact Assessment, Year one impacts, ekosgen, January 2020



Dundee FC's proposed new stadium, Camperdown

Context:

Dundee FC has submitted a Proposal of Application Notice for a new stadium at Camperdown. Although it is not technically a regeneration project, the stadium proposal is relevant as it includes housing, commercial, a museum and has a significant civic funding element.

The proposal includes: a 15,000 seat football stadium with ancillary accommodation to include: bars, function suites, a museum and a 100-bedroom hotel linked to the stadium.

Additionally this would be part of 7,500m² of mixed commercial accommodation potentially housing the following: bars & restaurants, creche facilities, gymnasias; commercial activities; local commercial services for

housing; crematorium.; 140 houses and up to 70 apartments, an extension to the existing ice rink; associated alterations to access roads, new parking, lighting and landscaping.

Funding/Timescale:

The total cost is projected at £144m, with the club's contribution around £30m-£40m. The Dundee FC Chief Executive said: *'My timescales are always much more aggressive than everybody else's. I want to get this accomplished and get it out so the city of Dundee can enjoy it. We're working with city council and we're hoping to have our full application in this summer. From there on we'll keep pushing as fast as we can. I would love to be playing in a new facility sometime in the 2024-25 season'*.

7.3 East Manchester regeneration. Commonwealth Games/ Manchester City sports complex

What was the situation?

The regeneration of East Manchester had been a long-term priority for the City Council. Over the previous 25 years the Council had sought to transform the physical, economic, social, and environmental fortunes of the area. At the heart of the renaissance of East Manchester has been the Etihad (formerly the City of Manchester) Stadium and the complex of sporting assets on the Etihad Campus.

In 1995, Manchester bid for and was awarded the 2002 Commonwealth Games. The sporting event would bring worldwide attention and investment to the city and offer a unique opportunity to kick start social regeneration, transforming the fortunes of some of Manchester's poorest neighbourhoods. The Games were the first major sporting event which involved a strategic framework for the regeneration of the city. A Legacy Programme was introduced to ensure that the event was 'more than ten days of sport' and to guarantee that disadvantaged communities throughout the North West of England would benefit from Manchester hosting the event.

What was the plan?

The overall project was put under the long-term operational management of New East Manchester Limited, established in 1999 as the second Urban Regeneration Company. The company represented a partnership between national (English Partnerships, Office of the Deputy Prime Minister), regional (North West Development Agency) and local government (Manchester City Council), with local communities playing a full part.

At the heart of this was a clear commitment to improve life quality in East Manchester, and a programme entitled 'Beacons for a Brighter Future', was set up to provide strategic direction, and ensure a holistic approach. The initiative relied on community and resident involvement and emphasised the importance of ensuring mainstream service providers deliver better quality local services. The Regeneration Framework for New East Manchester provided the basis for how the regeneration process should be taken forward.

The regeneration plan sought to:

- Double the population over 10 – 15 years (to 60,000 inhabitants)
- Build up to 12,500 new homes offering a range of tenure and type
- Improve 7,000 existing homes
- Create a 160ha business park
- Establish a Sportcity complex with 48,000 seat stadium and associated facilities
- Create a new town centre with retail provision, integrated public transport system and new regional park system
- Increase educational attainment above the city average.

What happened?

In the end, a total of £170m of capital investment in facilities was made to the City of Manchester Stadium and Sportcity complex, which includes the Aquatics Centre and Manchester Velodrome, together with athletics and squash centres.

In 2003, the stadium was handed over to Manchester City Football Club on a 200-year lease, under a deal negotiated and signed with the local council in 1999. The process of stadium development put the football club at the centre of plans to regenerate the area, with the club given new obligations as a result.

In 2011 Manchester City Football Club was about to embark on a further significant development on an area of land immediately across the road from their stadium. The proposals involved a large training complex, the Etihad Campus with several facilities open to the community, a walkway connecting the Campus with the main stadium, a sport-science unit, and a new sixth-form college.

In December 2017, Manchester City Council approved a further version of the Eastlands Regeneration Framework to guide the next phases of identified projects and development activity in and around the Etihad Campus as well as the westward expansion of activity along the Ashton Canal Corridor, joining up with the eastward expansion of the City Centre.

The facilities built for the Commonwealth Games in 2002 have not only reshaped the built environment but were accompanied by a huge number of funding initiatives and schemes as part of East Manchester's social regeneration and the social life and landscape in the area has been reconfigured in multiple ways through a series of different and often truncated stages of redevelopment⁴.

In the 20 year journey of transformation, the Eastlands area, and specifically the Etihad Campus, has been consistently viewed as a major economic driver within a city region and national context. The Stadium has acted as the beacon of the economic transformation of East Manchester, a symbol of change and improvement in the fortunes of the area. Successive Regeneration Frameworks have consistently identified the Campus as a place to drive forward the development of a globally competitive sport, leisure and recreation offer.

The profile of Manchester, the Etihad Campus, and the long-held ambition to develop the Campus as a place with a globally competitive sport, leisure and recreation offer, is now attracting significant interest from investors wanting to develop a 21st century sport, leisure and recreation offer of national scale. The new employment opportunities that would flow from this next generation of investment across the framework area could make significant impacts on the lives of residents and contribute to the delivery of the long-term regeneration of the East Manchester area⁵.

⁴ <https://www.socresonline.org.uk/20/2/13.html>

⁵ The Eastlands Regeneration Framework, Manchester City Council Report for Resolution, 2019



7.4 Glasgow Clyde Waterfront Regeneration. International Financial Services District and Atlantic Quay

What was the situation?

The city of Glasgow is the economic heart of the West of Scotland. Its economic and social health is essential, not only to Glaswegians, but to the rest of Scotland. To recover a decline in many of the traditional industries which employed the local population, Glasgow has gone through a transition from an industrial to a post-industrial city with the aim of improving growth and employment in areas such as tourism, retail, software, creative industries and financial services.

The main challenges that Glasgow faced were the River Clyde, Glasgow's historic decision to transfer its council housing stock to the new Glasgow Housing Association, and the continuing efforts to combat social exclusion and promote social justice in the city.

Regeneration of its riverfront both socially and economically, could play a key part in the overall revitalisation of Glasgow. Therefore, there was a need for the adoption and implementation of an effective strategy for the Clyde.⁶

What was the plan?

Between 2003 and 2014, a major focus of the Clyde Waterfront partnership was rejuvenating a 20km corridor along the river Clyde⁷ in one of Scotland's biggest ever regeneration projects bringing together public and private sectors. The project focused on the stretch of the River Clyde, from central Glasgow westwards past the towns of Clydebank, Renfrew and Erskine to Dumbarton.

The initiative started in 2003 following the publication of an OECD report, 'Urban Renaissance: Glasgow', which recognised that the river Clyde area and its surroundings represent the city's main underutilised assets: people, land, and buildings.

The overarching priority of Clyde Waterfront Regeneration Initiative (CWRI) was to develop a vibrant and thriving area around the river Clyde, with people and communities at its heart and was based on four themes of economy, place, people, and connectivity.

Clyde Waterfront was a strategic partnership between Scottish Government, Scottish Enterprise, Glasgow City, Renfrewshire and West Dunbartonshire Councils and importantly

the business community of the region working together in a long-term commitment to tackle the issues and opportunities facing the area.

It was projected that £4-4.8bn would be invested over the full 25-year regeneration project. The public sector input was £1bn from the Scottish Government, £200m from Glasgow City Council and £80m from Scottish Enterprise.

What happened?

Clyde Waterfront was funded through a combination of public and private partnership investments so far totalling circa £1.6bn, much of this by the private sector.

Around 250 individual projects fell under the umbrella of Clyde Waterfront with some of the more major ones listed here⁸:

- The International Financial Services District (IFSD) business district
- BBC Scotland and STV at Pacific Quay
- The SSE Hydro, the major new arena at SECC
- The Riverside Museum
- Glasgow Harbour residential district
- Town centre improvements in Govan, Renfrew, Clydebank and Dumbarton
- Additions to Braehead including Xscape
- Relocation of Clydebank College
- Titan Enterprise and Titan Crane developments at Clydebank waterfront
- Lomondgate developments (inc Aggreko's new manufacturing facility) near Dumbarton.
- St Enoch Centre extension
- Grand Central Hotel redevelopments

Glasgow's new financial district extended along Broomielaw and involved around £120m of office development (400,000 sqft). Atlantic Quay (part of The International Financial Services District) consists of a group of six

office buildings with the access to Junction 19 of the M8 motorway and Argyle Street underground station close by. It created a whole new urban quarter within Glasgow City Centre, combining offices, housing, retail, and leisure with a sense of place while linking existing waterfront development with the more traditional city core. The scheme was drawn together by a high-quality public realm, creating new urban spaces to act as a focus for social activity for Atlantic Quay and the rest of its immediate neighbourhood.

The Pacific Quay has attracted many high profile companies, particularly at The Hub. Tourism & leisure were key priorities with the £74m Riverside Museum opened in May 2011 and the development of the 12,500 seat SECC National Arena reinforcing Glasgow's position as one of the UK's top conferencing and visitor destinations.

Construction work on the £842m NHS South Glasgow Hospital project and the 5-mile long M74 extension completed ahead of schedule. Capella Group submitted a £90m plan for the Atlantic Quay development in Glasgow's IFSD including two multi-storey office buildings, and a 150-bed hotel as well as a public square, shops, leisure facilities, health club and conference centre.

The Clyde Waterfront plan has helped the local authority and private sector work together in its approach to regeneration, using the lessons learned in the implementation of subsequent projects such as the Glasgow and Clyde Valley City Deal.

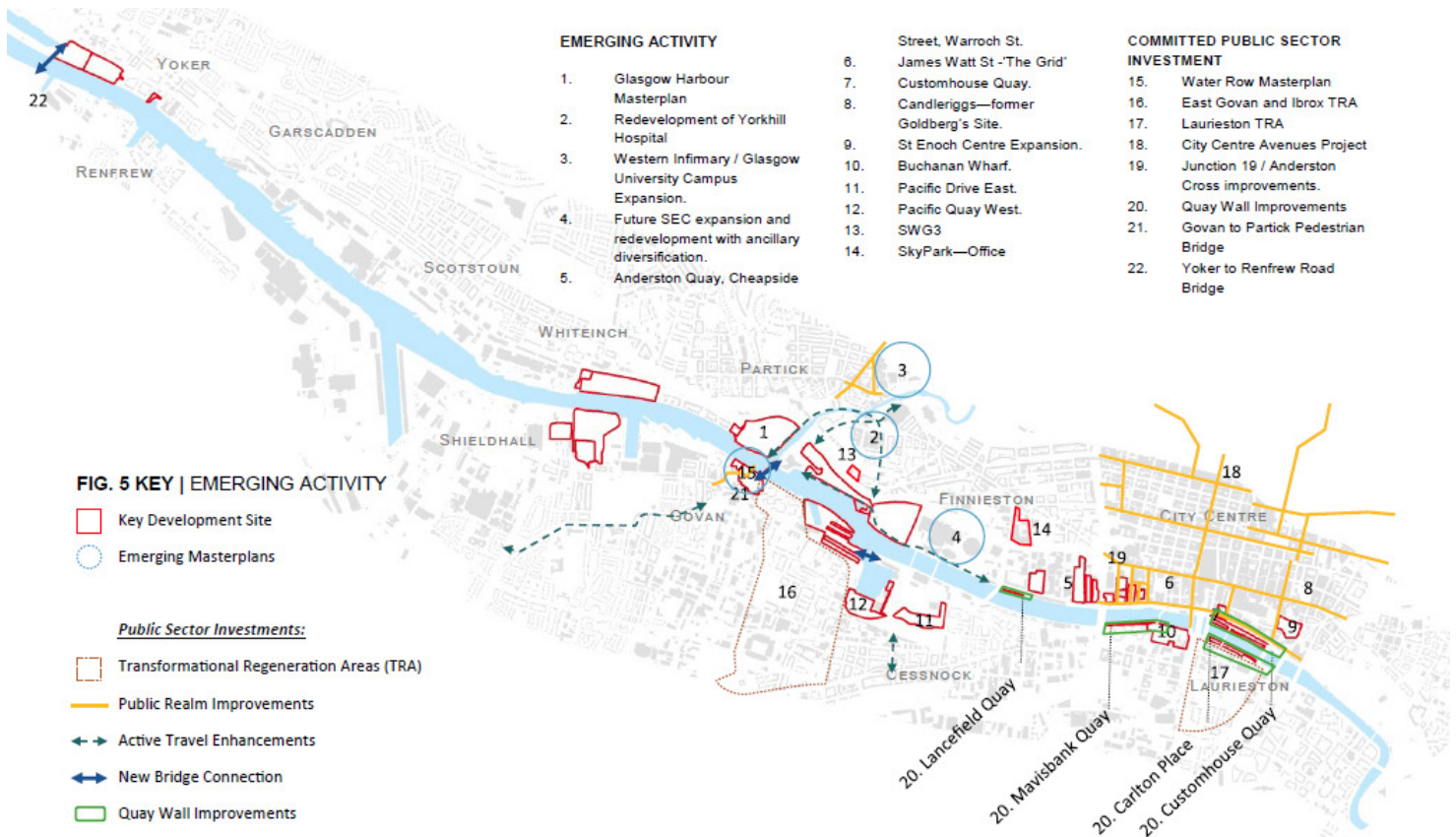
⁶ Urban Renaissance, Glasgow: lessons for innovation and implementation, OECD, 2002

⁷ <http://www.clydewaterfront.com/about>

⁸ <http://www.clydewaterfront.com/about/vision-and-achievements>

⁹ <http://www.clydewaterfront.com/our-journey/expert-articles/clyde-waterfront-regeneration-what-happened-in-2010>

¹⁰ <https://www.glasgowarchitecture.co.uk/atlantic-quay-glasgow>



7.5 Bradford Odsal Stadium

What was the situation / issue?

Odsal Stadium in Bradford, West Yorkshire, England, is the home of Bradford Bulls Rugby League team. It has also been used by the Bradford Dukes Speedway Team, BRISCA F1 and F2 stock cars and the Bradford City football team. The stadium has also been used for various sporting events such as baseball, basketball, rugby, kabaddi, show jumping, tennis games as well as live music concerts and the 1997 Speedway Grand Prix of Great Britain. The Odsal stadium is owned by Bradford City Council but in 2012, the Bulls got into severe financial difficulties and the Rugby Football League stepped in and bought the lease over.

Odsal is considered one of English rugby league's most historic stadiums. It first opened in 1933 and famously drew a crowd of 102,569 for the 1954 Challenge Cup final replay between Warrington and Halifax. The stadium still attracted large crowds as the Bulls enjoyed great success in the 1990s and 2000s. However, the team went into administration in 2012 and was liquidated in 2017 and the venue, along with the Bulls, has fallen on hard times in recent years.

What is the plan / objectives?

In September 2022, Bradford Council unveiled plans to build the largest covered stadium in England and a regional skills centre for Rugby League as part of a new complex for elite sports. The plans would lead to the delivery of a world-class training complex for elite sports in Odsal accompanied by a Skills, Training and Education Centre and a new 25,000-capacity home for the Bradford Bulls.

The Bradford Council proposed plans are to transform Odsal Stadium into a new modern facility and a national home for the sport. The Council set out a series of bold and ambitious bids totalling over £100million to develop the corridor from Richard Dunn Sports Centre down to the valley, deliver a line of economic, social and cultural benefits and to

help 'Level Up' the district. The complex is part of Bradford Council's long-term strategy of utilising the power of culture, including sport to be an economic driver of clean, inclusive economic growth. The bid says the stadium will allow the city to host other major sporting events like boxing matches as well as becoming a home for major music, entertainment and cultural performances, capitalising on the legacy which will be left by Bradford's successful bid to become UK City of Culture in 2025.

The redevelopment will lead to the creation of a new Rugby League Skills Centre, five new sports pitches for rugby and football, the improvement of two existing community sports pitches, a new 105-bedroom hotel and a 55,000 square metre solar farm that would power the site. It also would include a multi-storey car park which would be linked to a park and ride. The stadium and sports complex would also create 480 full time jobs over a decade.

Analysis suggests the new complex would attract more than 1.25 million visitors a year and lead to £625million visitor spend and more than £1billion of socio-economic benefits for Bradford district.

The new centre of excellence for Rugby League is seen as a unique opportunity to break the cycle of poverty in the area by investing in the future of this community and creating an outstanding venue that the whole district can be proud of and benefit from.

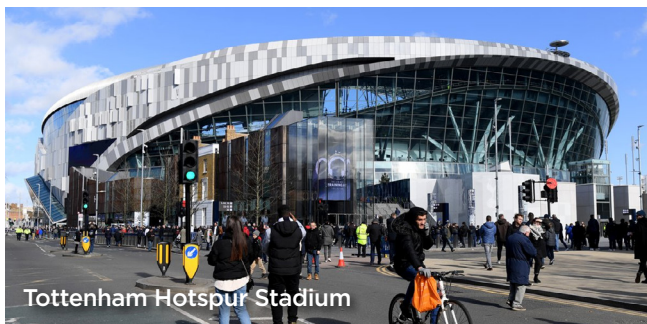
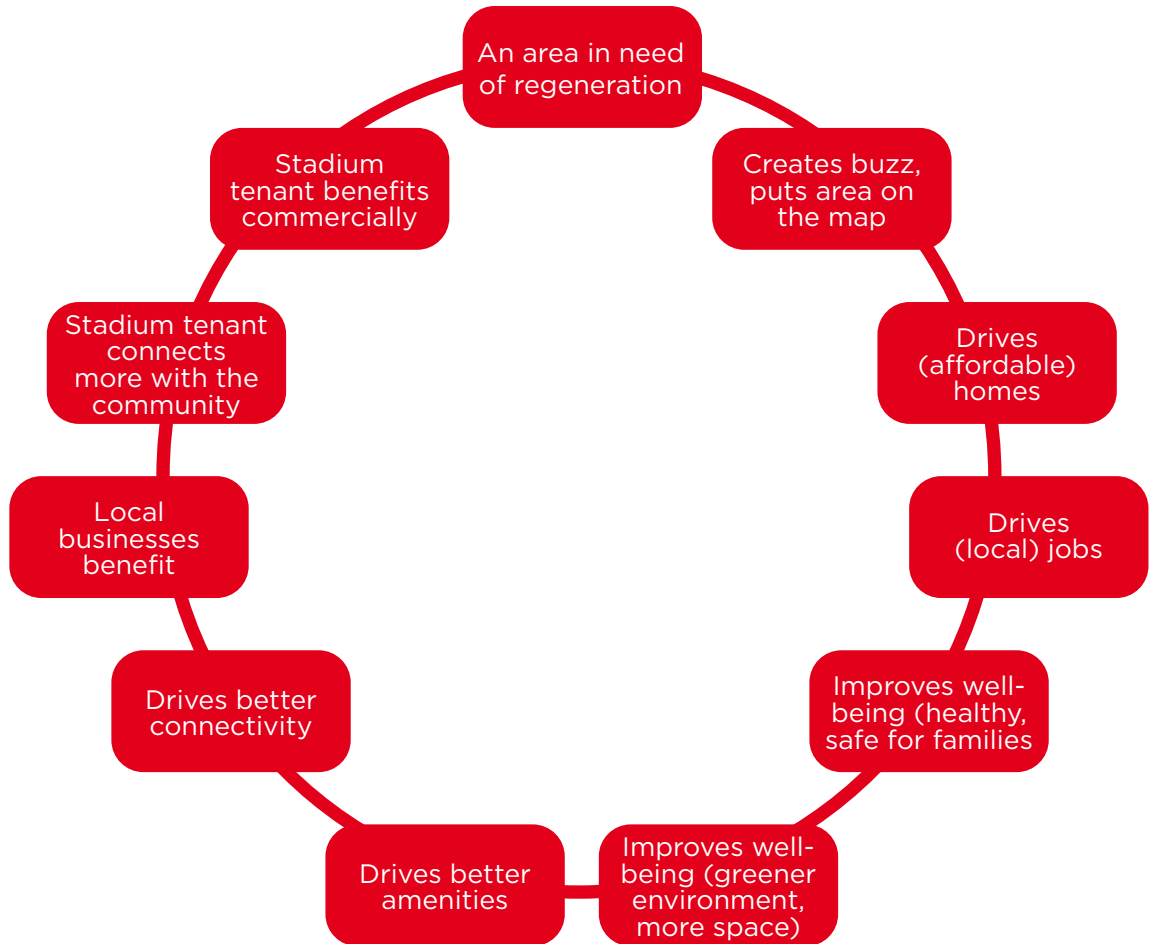
<https://www.thetelegraphandargus.co.uk/news/22316192.odsals-biggest-stadium-permanent-roof-country-new-plans/>

<https://www.yorkshirepost.co.uk/business/huge-plans-for-new-25000-capacity-roofed-bradford-bulls-stadium-revealed-with-millions-sought-from-government-3849694>



7.6 Other examples of sports stadiums driving regeneration: Swansea, Den Haag, Malmö, Tottenham, Fulham, Millwall and Everton

As well as the four main case studies, our work led us to review projects in other parts of the UK and Europe. In summary, this identified eleven characteristics of successful regeneration projects with community sports stadia at their heart





SURVEY RESULTS



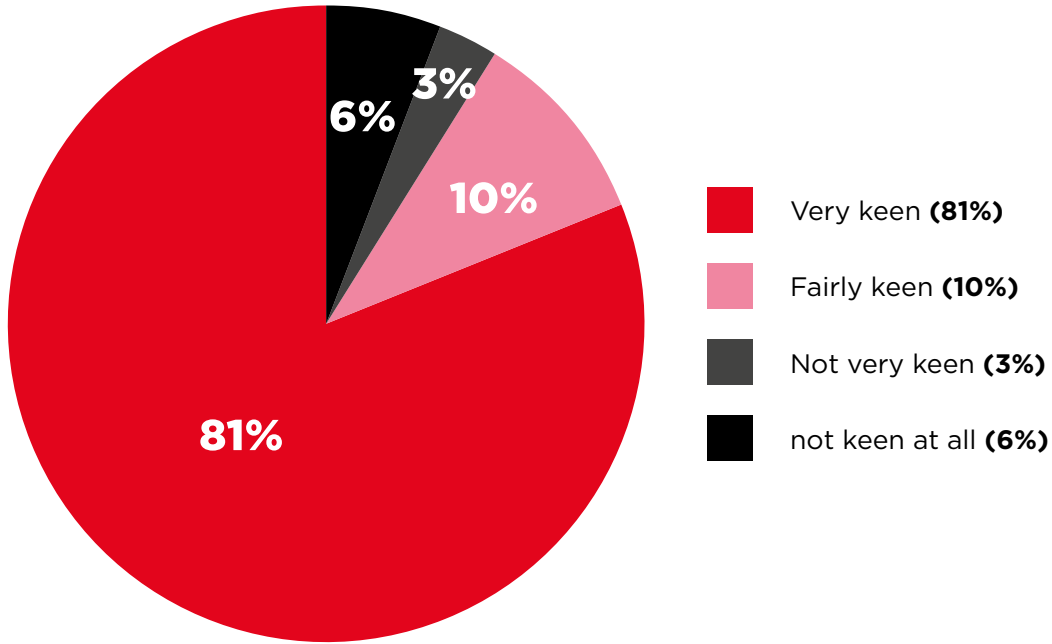
80

Levels of support for a community sports stadium as the anchor project in the Aberdeen Beach Masterplan among key stakeholder groups.

Online survey conducted by the Research Chamber 24th May - 6th June

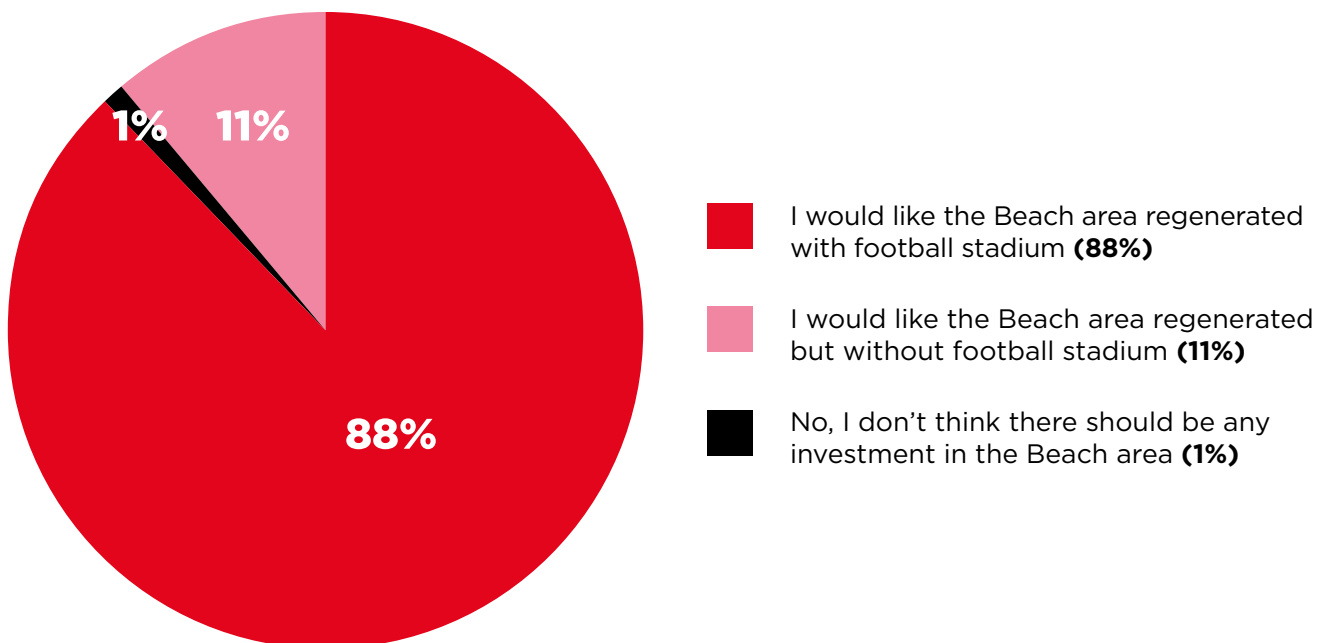
Sample: 995 respondents

Q1. How keen are you to see the Beach area regenerated including football stadium?



Note: 58% of those with no interest in football/Aberdeen Football Club were also very/fairly keen to see these plans progress

Q2. Would you like to see the Beach area regeneration include the football stadium?



Q3a. What score out of ten do you give this Beach regeneration plan, where 10 is a great idea and 0 is not a great idea at all?

8.7/10

Q3b. Why do you say that?

A representative range of verbatim comments from respondents. 821 received in total

Beach in need of regeneration	Beach is an asset	Current Beach users have some issues
<p><i>Aberdeen as a destination really needs to up its game. The beachfront for too long has been ignored and neglected. We should be investing heavily in this area (and others) to attract not only residents of Aberdeen and shire but the wider tourist population. This plan can help to do this.</i></p> <p><i>It would help rejuvenate the whole area.</i></p>	<p><i>Aberdeen beach is amazing, a great selling point for Aberdeen and is the traditional home of AFC</i></p> <p><i>The beach area is a fantastic asset to the city which could be greatly improved with some much-needed investment.</i></p>	<p><i>Removing parking from the beach front is an impedance to those who go there to use the water. Surfers, paddle boarders' kayakers etc.</i></p> <p><i>The infrastructure doesn't look like it is being improved so traffic issues will still be a problem.</i></p>

Q4. What score out of ten do you give the new stadium plan, where 10 is a great idea and 0 is not a great idea at all?

This question was asked to determine the level of support for the plan including a stadium.

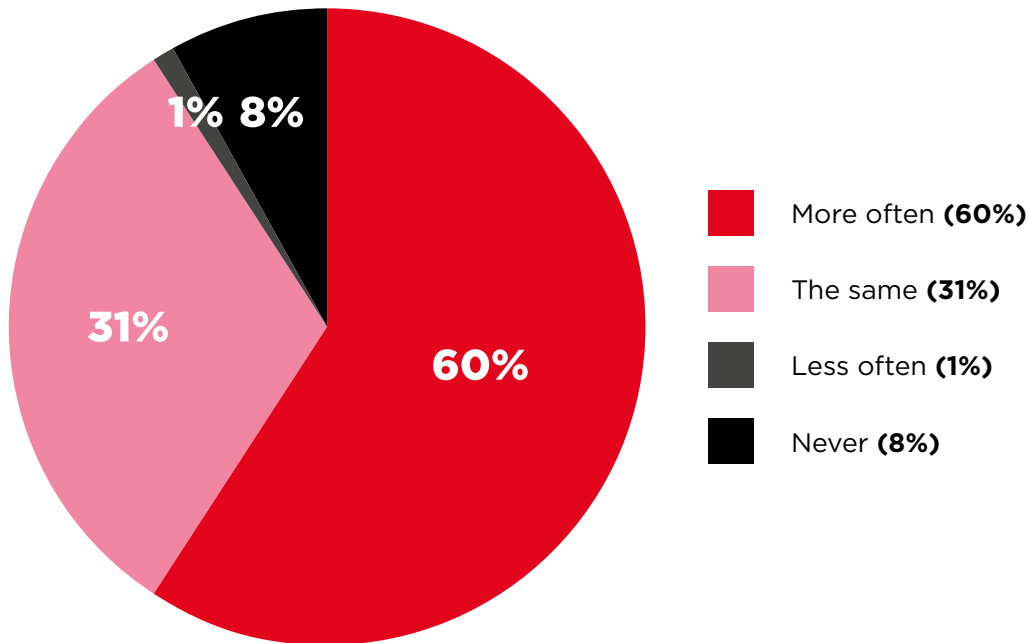
8.4/10

Q4b. Why do you say that?

A representative range of verbatim comments from respondents. 779 received in total

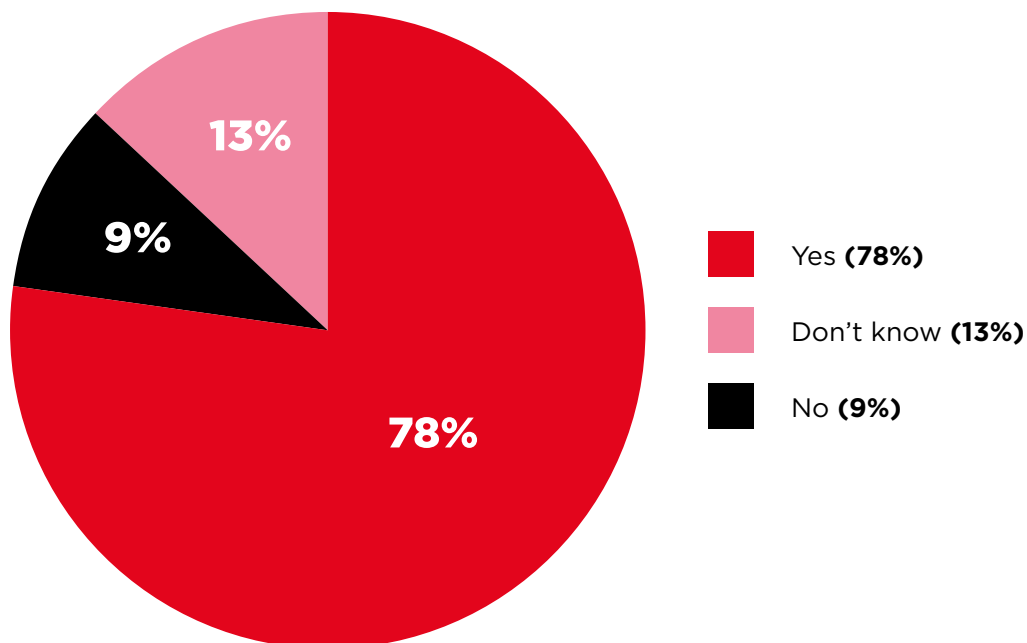
Need for new/modern stadium	Aberdeen FC belongs in the city	Some area of concerns
<p><i>A modern multi use stadium is exactly what is required.</i></p> <p><i>A new stadium is desperately needed.</i></p> <p><i>AFC needs a modern stadium to help attract new fans and provide an improved match day experience.</i></p>	<p><i>Aberdeen FC has always been at the beach area. It is much more accessible, and people can walk from city centre to stadium and visit other facilities in the area before and after games.</i></p> <p><i>Aberdeen FC needs to remain in the City of Aberdeen due to the economic boost it gives to businesses.</i></p> <p><i>It keeps AFC in the heart of the city where it belongs.</i></p>	<p><i>Provide decent transport links to it.</i></p> <p><i>More detail is required, and stadium has to be minimum of 20,000 capacity.</i></p>

Q5. Compared to now, how often will you use these new sports and leisure facilities if they go ahead?



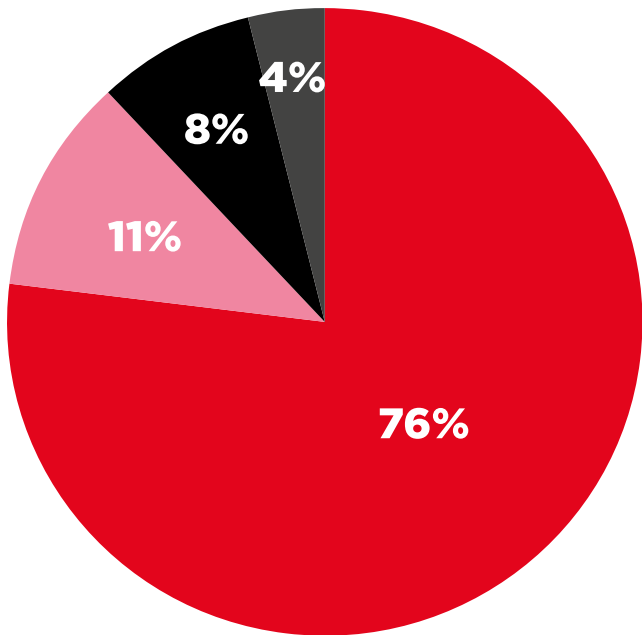
Three in five said that they would use the new sports and leisure facilities more than they do currently. This is important as it promotes healthier lifestyle and demonstrates the facility would be used on a daily basis, not just for 20 or so Aberdeen FC matches per year





Q6. Do you think the investment by Aberdeen Football Club and Aberdeen City Council will lead to additional private investment being made in the regeneration and development of the area?



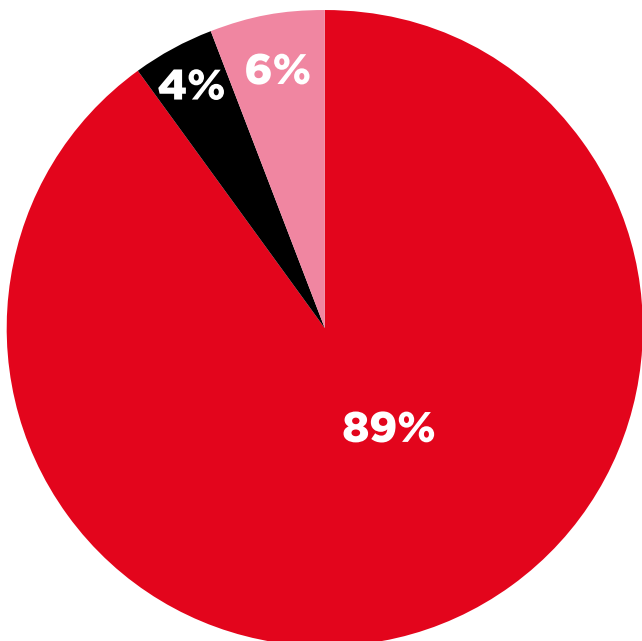
The vast majority thought that the regeneration plans would stimulate additional private investment (78% yes v 9% no). Business owners were even more strongly of this view (83% yes v 5% no).






Q7. Which of these answers is most true of you?



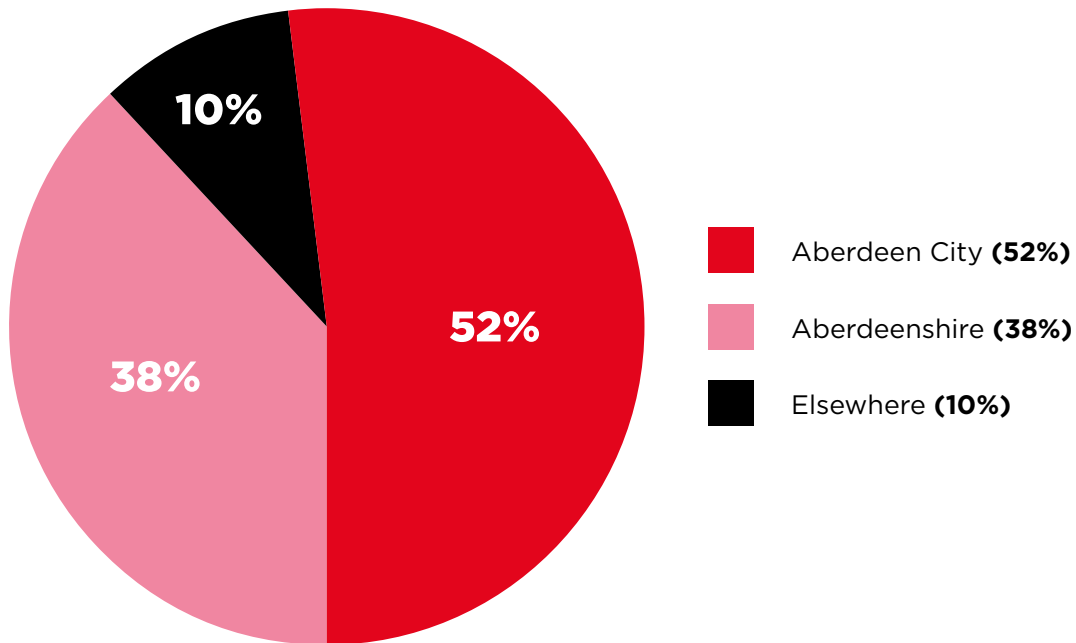
-  I am an Aberdeen Football Club fan **(76%)**
-  I wouldn't say I'm an Aberdeen Football Club fan but I do like to see the team do well **(11%)**
-  I support another team but think the new stadium is good for the area/ Scottish football **(4%)**
-  I have no interest in football/Aberdeen Football Club **(8%)**

Q8. Is your main interest in this project as a



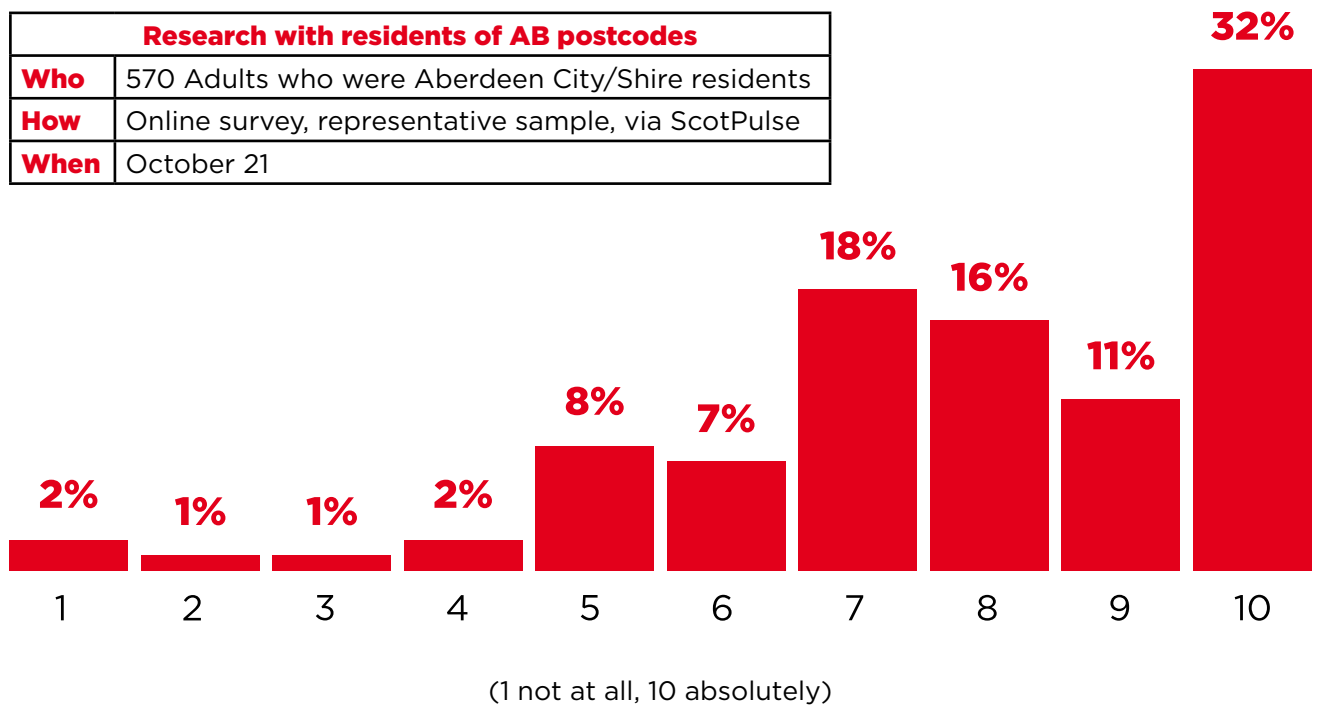
-  Member of public **(89%)**
-  Business owner/ leader/ investor **(6%)**
-  Community group member **(0.5%)**
-  Other **(4%)**
-  No interest **(0.5%)**

Q9. Where do you live?



What is your personal appetite to see big change projects go ahead in the region?

Research with residents of AB postcodes	
Who	570 Adults who were Aberdeen City/Shire residents
How	Online survey, representative sample, via ScotPulse
When	October 21



Following public consultation associated with Masterplan development, the use of the beachfront as the location for a new stadium came out as one of the top 10 priorities of the local community, with public consultation highlighting the importance to the community that Aberdeen FC remains within the city, so that match-day footfall and consequent business to local retailers is maintained/enhanced, and that games remain accessible to all.

