



OLD TRAFFORD

REGENERATION

Old Trafford Regeneration – Programme Feasibility and Options Paper

Executive Summary

6 January 2025

GLOSSARY

Term	Definition
OTR	Old Trafford Regeneration
GMCA	Greater Manchester Combined Authority
IAWG	Inter-Agency Working Group
MUFC	Manchester United Football Club
OE	Oxford Economics
TfGM	Transport for Greater Manchester
TMBC	Trafford Metropolitan Borough Council
SCC	Salford City Council
MIFT	Manchester Industrial Freight Terminal
FL	Freightliner
ENW	Electricity Northwest
WCML	West Coast Mainline
MHCLG	Ministry of Housing, Communities and Local Government
DfT	Department for Transport
St Helens BC	St Helens Borough Council
Parkside	ILP North
LPA	Local Planning Authority
FOC	Freight Operating Company
SRO	Senior Responsible Officer
NSIP	Nationally Significant Infrastructure Project
GVA	Gross Value Added
Capex	Capital Expenditure
EBITDA	Earnings before Interest, Tax, Depreciation and Amortisation.
F&B Offerings	Food and Beverage Offerings

Term	Definition
SRF	Strategic Regeneration Framework: a long-term plan guiding the physical and socio-economic revitalisation of a specific area. It outlines a vision, objectives, and actions to attract investment, improve infrastructure, and enhance the quality of life for residents and businesses.
TFD	Transport Framework Document: a long-term strategy for developing and managing transportation systems within a specific area. It typically assesses current and future travel needs, identifies transport considerations, dependencies and opportunities, whilst proposing solutions to improve accessibility, connectivity, and sustainability.
PMO	Programme Management Office: a centralised unit within an organisation that provides guidance, support, and oversight for projects or programmes. It establishes standardised methodologies, manages resources, monitors progress, and ensures alignment with strategic objectives.
DCO	Development Consent Order: a type of planning permission in the UK that grants consent for Nationally Significant Infrastructure Projects (NSIPs). It streamlines the approval process by combining various consents and approvals required for large-scale developments, such as power stations, airports, and major transport links.
Masterplan	A document outlining the vision and development strategy for a defined area. It typically includes context analysis, indicative layout and scale plans, land use mix, anticipated infrastructure requirements and wider development principles. Also include delivery and phasing strategies to guide future development and ensure cohesive growth.
Stadium District	The Stadium District includes land between Wharfside Way and the mainline railway to the south. It comprises various land currently identified as land owned by MUFC around the stadium. Further consideration needs to be given to whether the Stadium District is expanded if Freightliner relocates; or if the Freightliner land would become its own character area.
Trafford Wharfside	An area identified by the Draft Trafford Wharfside Development Framework (2023) and Draft Wharfside Masterplan (2024). The proposed draft OTR boundary includes this area and has expanded to include Projects A, B, and C.
Tripartite	The partnership between Greater Manchester Combined Authority (GMCA), Trafford Council (TMBC), and Manchester United Football Club (MUFC). This group underscores the project's significance and its potential to deliver transformative change.
Task Force	A group of public sector and industry leaders established to help develop an ambitious vision for the area around Old Trafford, with a focus on how a world-class stadium can catalyse wider regeneration.
MIPIM	An international real estate conference, which provides the platform for public and private sector organisations to launch major new development and regeneration projects.

THE OPPORTUNITY - OLD TRAFFORD REGENERATION

OTR VISION

Old Trafford Regeneration will leverage its unique assets to catalyse transformational regeneration that creates a world-class, sports-led visitor destination, a rich cultural and entertainment offer, delivers high quality homes, new businesses, creates thousands of new jobs and drives wider inclusive growth opportunities. OTR will establish the delivery framework to enable Trafford to become one of the best places in the UK to live, work, and visit and maximise its positive contribution to the wider city region's economy.







A trail-blazing **opportunity** to deliver one of the biggest regeneration projects in the UK through collaborative private and public sector investment that accelerates growth in the North

Establishment of a cross-sector and industry Task Force and collaborative Tripartite has set the foundations for **partnership and programme sponsorship**

Old Trafford Regeneration will ...

-  Create a globally recognised exemplar of sports-led regeneration in Trafford, with a world-class stadium at its heart.
-  Enhance Greater Manchester's brand as one of the biggest football cities in the world
-  Maximise the potential of land surrounding Old Trafford to deliver a new visitor destination, and a thriving place to live and work
-  Accelerate economic growth in Trafford, Greater Manchester and the UK, with the potential to add up to **£7bn net GVA** to the UK economy.
-  Strive to create **up to 70,000 new jobs** in the regional economy and **c.90,000 new jobs** nationally

... aligned to the Government's Growth Mission:

ECONOMIC AND FISCAL STABILITY	INVESTMENT, INFRASTRUCTURE AND PLANNING	PLACE	INDUSTRIAL STRATEGY AND TRADE	INNOVATION	PEOPLE
					
OTR ALIGNMENT					
Committed regional spending	Billions of private investment in infrastructure in GM	Transformative place-making	Growth industries such as digital and creative..	Potential innovation site focused on advanced technology in sport	Significant job creation and investment opportunities

OLD TRAFFORD REGENERATION - STAGE 1 TRIPARTITE OPTIONS REPORT

Stage 1 of the Old Trafford Regeneration Programme has explored the feasibility of projects in the OTR area and identified options and next steps to transition the programme into a development phase. Options have been examined in collaboration with Tripartite partners, and other key stakeholders. This report provides a consolidated view of the work to date, the emerging options, and identification of the next steps required.

THE OPTIONS REPORT WILL:

1

Consolidate the work to date

Bringing together the findings of various workstreams and activities across OTR partners and stakeholders

2

Identify project options

Consider feasibility of emerging options within each project to identify the preferred way forward and next steps to progress over Stage 2.

3

Establish next steps

Provide clarity on the key next steps that are required to successfully transition into a development phase.

4

Forward-Look

Provide a forward look of activities required in 2025, as part of a Stage 2 'development' phase.

OTR AREA

This report has been shaped around the Old Trafford Regeneration area (*right*) This is the spatial area focused on regeneration, however the scale of impact delivered by OTR will be much broader – driving growth in the Greater Manchester Western Gateway, the North-West as a region, and for the UK economy.

Fig 1. DRAFT proposed new OTR boundary



Source: Promap (2024)

THE TRIPARTITE

GMCA GREATER
MANCHESTER
COMBINED
AUTHORITY



OLD TRAFFORD REGENERATION - JOURNEY TO DATE

The programme has so far focused around two key stages. Stage 0, mobilisation, and Stage 1, feasibility. In Stage 0, OTR was defined into five key projects, with key considerations identified in each. During Stage 1, these considerations have been explored through collaboration with key partners and stakeholders, to identify the options moving into development.

STAGE 0

Establishment of OTR **Governance**, including the Task Force and Inter-Agency Working Group.

Identification of **five distinct OTR Projects...**

Project A: The Stadium
Project B: The Stadium District
Project C: Freight Relocation
Project D: Trafford Wharfside
Project E: Transport

... and **Project Sponsors from the Tripartite**

Oxford Economics identify the potential **Economic Impact** of Old Trafford Regeneration including the Stadium Project

Development of a Project Plan, to explore the feasibility of each OTR Project

STAGE 1

Collaborative Project Workshops with partners to unpack options within each Project, identifying **opportunities, risks, and the decisions** required to move forward

MUFC Fan and Community surveys, focus groups and open days, to identify sentiment among key stakeholders for the programme

Engagement with core stakeholders across all projects

Discussions with neighbouring landowners to **explore acquisition opportunities**

Stage 1 stock take of emerging programme options and the next steps required to mobilise the next phase of OTR

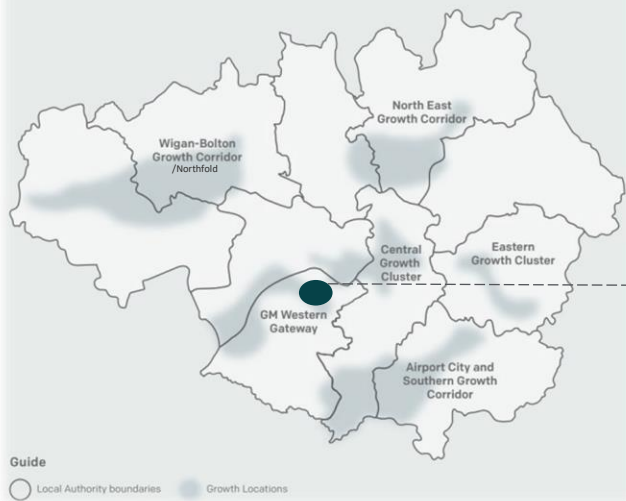
WIDER STRATEGIC CONTEXT

Old Trafford Regeneration is a key scheme in Greater Manchester, looking to deliver transformational growth across the city-region. Its vision and objectives are therefore aligned to Greater Manchester's regional growth agenda, particularly focused on outcomes in Trafford and Salford. Old Trafford Regeneration will be a catalyst project within Greater Manchester's Western Gateway, one of six growth locations identified at a regional level to focus development and investment.

GREATER MANCHESTER

Leaders across Greater Manchester have set ambitious targets for Growth that include housing delivery, job creation and higher productivity across key sectors.

Greater Manchester's Growth Locations



To deliver this vision, six Growth Locations have been identified to unlock the full potential of the city-region and act as a target for investment

THE WESTERN GATEWAY AND NEIGHBOURS



Old Trafford Regeneration is a key catalyst site within the Western Gateway. It is neighbored by other significant development schemes that together will lead to transformational regeneration across both Trafford and Salford, supported by good connectivity with key sites in the 'city-core'. The Western Gateway provides OTR with a strategic underpinning for growth.



Source: Google images

TRAFFORD

- 1 Old Trafford Regeneration
- 2 Trafford Civic Quarter
- 3 Trafford Park
- 4 Stretford Town Centre
- 5 New Carrington

SALFORD

- 6 Port Salford
- 7 Eccles Town Centre

CENTRAL CLUSTER

- 8 MediaCity UK
- 9 Salford Quays
- 10 City Core

EMERGING OPTIONS – THE STADIUM

**WORK TO DATE**

- ✓ MUFC have identified and short-listed options for the redevelopment of Old Trafford, or construction of a new stadium
- ✓ Identification of estimated development and construction timescales, and costs
- ✓ Identification of land assembly requirements for both main options
- ✓ Exploration of commercial opportunities and risks against both main options
- ✓ High-level assumptions review, underpinning the business case for the new build option
- ✓ Engagement with fans and community to understand views and priorities

MUFC's vision is to develop a world-class stadium and sports campus at Old Trafford that acts as a catalyst for wider growth.

Options

MUFC have explored a number of options for the stadium project, which have now been narrowed down to two – one redevelopment option, and one new build option.

	Capacity
Redevelopment option	87,000
New build option	100,000

With regard to funding and delivery, MUFC is still assessing options.

Project status + Stage 1 findings

Both options will deliver transformative benefits for the Club as well as Trafford and beyond, but these are amplified under the new build option. The MUFC fan survey has identified that 52% of fans favour the new build scenario, while 31% prefer redevelopment. 17% are unsure of a preference.

Both options rely on the acquisition or clearing of land and could not be completed solely using

existing MUFC land.

Both options will require detailed consideration in 2025 on the approach to planning consent and a plan for engagement with the Local Planning Authority.

DECISIONS AND NEXT STEPS

- Preparation for MUFC **Owners decision on preferred stadium option** by end of season
- Appointment of the required professional and technical services teams (e.g. planning, design) to progress with Projects A and B
- Business planning, funding, and commercial case development for the stadium
- Continued fan and community engagement on emerging stadium option

EMERGING OPTIONS – THE STADIUM DISTRICT

**WORK TO DATE**

- ✓ Identification of Stadium District boundaries
- ✓ Vision and objectives to create a best-in-class sustainable mixed-use regeneration quarter, with sport and entertainment at its heart
- ✓ Early assessment of major socio-economic growth potential, alongside wider OTR programme
- ✓ Masterplanning work has commenced to identify constraints, opportunities and emerging design principles for future development
- ✓ Engagement with fans and community to understand views and priorities
- ✓ Engagement with local planning authority to discuss vision and key considerations

Project status + Stage 1 findings

The Stadium District is intended to be a mixed-use urban quarter centred around football and sports. The world-class stadium at its heart will act as a catalyst for much wider sports-led regeneration, driving new investment, jobs, visitors and amenities.

The Stadium District is currently proposed as two distinct land parcels, one under the ownership of MUFC, and the other currently under the ownership of third parties. There is potential for freight and industrial land users to be relocated (Project C) which would unlock land for development as part of a wider Stadium District masterplan.

MUFC is in the process of reviewing a range of masterplan options, with an objective to deliver an exemplary regeneration project that complements the Stadium, responds positively to the wider OTR area and surrounding communities and supports the long-term financial sustainability of the Club.

The regeneration potential for the Stadium District is substantial and has been identified by Oxford Economics (OE) as the significant driver of economic benefit within the OTR scheme. Based on an early vision of the masterplan that includes the full extent of the potential district including freight land, OE consider the stadium district has the potential to deliver £3.37bn of GVA and 37,000 new jobs in Trafford, increasing to £5.6bn and 64,000 new jobs for the UK economy. This impact analysis will be tested further as the district masterplan develops alongside an identification of included land parcels.

A community survey identified that 61% of people are positive about regeneration, with 24% negative (remainder unsure). Residents are excited about the creation of new jobs, businesses, and sports facilities.

To ensure a joined up and coordinated approach to regeneration of the Stadium District, it will be necessary for early engagement with the local planning authority to test and reach agreement on key constraints, opportunities and design principles, followed by consultation with key stakeholders.

DECISIONS AND NEXT STEPS

- Agree optimum land use mix that: delivers objectives, including regeneration benefits, and complements the wider development pipeline across Trafford and Salford
- Stadium District to be defined (inc. / exc. third-party land parcels) – Tripartite agreement to be reached and area to be identified within future OTR Framework
- Mobilisation of professional and technical services required to further develop the stadium district proposition including masterplanning, design and planning.
- Determine delivery model for the Stadium District

EMERGING OPTIONS – FREIGHT RELOCATION

**WORK TO DATE**

- ✓ Identification of Freight operators and potential relocation routes
- ✓ Discussions with Freight operators to explore relocation feasibility
- ✓ Discussions with scheme promoters for potential replacement freight interchanges in other locations
- ✓ Engagement with TfGM and Network Rail to explore the technical feasibility of relocation
- ✓ Negotiations for a potential land transaction to seek to meet requirements for the Stadium Project and maximise the wider OTR opportunity

Project status + Stage 1 findings

OTR Stage 1 has established potential options for how freight operations in Trafford Park could be relocated to other strategic locations in the North-West, unlocking further regeneration land and realising transport benefits.

A structured approach to a potential relocation strategy has been developed that seeks to satisfy site requirements for a potential new-build stadium, whilst enabling the long-term objective to relocate freight operations from Trafford Park to significantly reduce freight traffic travelling through Manchester City Centre and release routes for passenger services.

The pillars of a freight relocation business case have been identified through engagement with transport stakeholders and would require further development in 2025. This includes potential transport benefits such as released capacity and performance improvements, and the regeneration opportunity from unlocking freight land.

The Tripartite will continue to work collaboratively to develop the freight relocation business case and begin engagement with Government in 2025.

DECISIONS AND NEXT STEPS

- ❑ Development of a freight relocation business case to support the long-term regeneration objectives of Old Trafford Regeneration, and transport benefits for the North-West and UK.

EMERGING OPTIONS – TRAFFORD WHARFSIDE / OTR AREA

**WORK TO DATE**

- ✓ Publication of the Draft Trafford Wharfside Development Framework (2023) and Draft Wharfside Masterplan (2024)
- ✓ Engagement between the local planning authority and OTR Lead Advisor to discuss interrelationships between existing and emerging policy and guidance, and technical evidence
- ✓ Proposed draft OTR Framework boundary and outline approach for developing new policy and guidance

Project status + Stage 1 findings

A Strategic Masterplan area has been identified for the OTR footprint that will include the existing Wharfside area, but now providing a planning policy framework for Projects A and B and support for Project C. It is anticipated that a Strategic Regeneration Framework will be developed for the area, which will serve as a bridge between adopted / emerging planning policy and detailed development proposals.

Bringing forward a SRF for OTR can be used to great effect in aligning stakeholder objectives and capturing these as a single narrative to underpin the delivery of major regeneration programmes. The result would be an endorsed vision, objectives and set of development principles that serve as planning guidance for proposals as they are brought forward through the planning process and underpin any land assembly considerations. SRFs can also serve as an investment prospectus for OTR, as it would articulate the strategy for delivering complex major proposals and associated infrastructure. From a scheme promoter's perspective, the SRF will be prepared in consultation with landowners and the document would ultimately underpin support for schemes that are aligned with its key principles.

The purpose and scope of the SRF will need to be given careful consideration by the Local Planning Authority and the Tripartite (and any future delivery body) in the context of how it balances its function as a planning document that supports the scale of opportunity across OTR; as an investment prospectus; and also incorporates sufficient flexibility that enables it to respond to changing market

dynamics, constraints, and opportunities.

As outlined in the draft plans at Figure 1 and Figure 2, the OTR SRF is proposed to include the draft Wharfside Framework area in addition to freight and industrial land to the west of MUFC. It would also include small additional parcels of land and highways that are expected to be important for enhancing connections and boundary relationships around the perimeter of the framework area.

The draft Framework boundary will be presented to TMBC Executives in January 2025 for endorsement and then become the boundary for a new delivery body and be ratified as part of any business case development process for this body.

Fig 1. DRAFT proposed new OTR boundary



Source: Promap (2024)

Fig 2. Draft Wharfside Framework Area (2023)



Source: Promap (2024)

DECISIONS AND NEXT STEPS

- Tripartite endorsement of revised OTR Framework area and terminology
- Decision to establish a Mayoral Development Corporation to act as the OTR delivery vehicle
- Trafford Council to outline emerging Local Plan policy scope; including required third party information and programme
- Tripartite endorsement of proposal to develop a Strategic Development Framework for OTR area, including purpose and scope.
- Update of the Economic Impact Analysis to include the emerging development proposition across the OTR area.
- Early engagement of key stakeholders to inform emerging policy and guidance, including landowners, local council members and MPs, businesses and residents

EMERGING OPTIONS – TRANSPORT

**WORK TO DATE**

- ✓ Engagement with TfGM and TMBC to identify high level sustainable transport objectives for OTR
- ✓ Identification of high-level strategic transport considerations
- ✓ Convening of transport stakeholders across TfGM, TMBC and Salford City Council (SCC) to agree strategy to develop a future Transport Framework Document (TFD)
- ✓ Development of initial scoping by TfGM with intention for commission in early 2025

Project status + Stage 1 findings

OTR is a highly accessible location, with three Metrolink stops, bus, road, cycle and pedestrian infrastructure all within easy walking distance. The development of a sustainable movement strategy will therefore seek to underpin growth across OTR.

Whilst acknowledging OTR will deliver a significant increase in trips to and from the area, the Tripartite seeks to reduce road congestion and disruption in the surrounding and wider area. A priority for future investment will therefore be to optimise the capacity of existing infrastructure and to identify ways in which this can flex to serve the daily needs of existing and future communities, whilst also improving management of movements on match days.

TfGM has identified that potential public transport options could include investment in the existing Metrolink network to support a growth in capacity, and bus service improvement and infrastructure and the potential for a new heavy rail station should be investigated. To determine the future travel demands from OTR and the associated infrastructure and investment requirements, it will be necessary to adopt a vision led approach to planning for the growth and development plans for the area, through the production of a Transport Framework Document. The TFD will establish existing

capacity, future travel demands and capacity and consider transport infrastructure and service options.

Transport has been considered at this stage across the whole OTR area, so that clarity can be reached early in the project regarding any infrastructure requirements, enabling them to either be identified or discounted at an early stage.

It will also be important to identify the relationship between OTR and growth and investment in the wider Western Gateway Growth Location, to align required infrastructure and service investments. In Stage 2, the TFD will consider interactions with wider transport infrastructure in the Western Gateway and align with other transport studies taking place in the growth location.

The TFD should be commissioned in 2025, and form part of shaping any planning application under preparation for the stadium and stadium district .

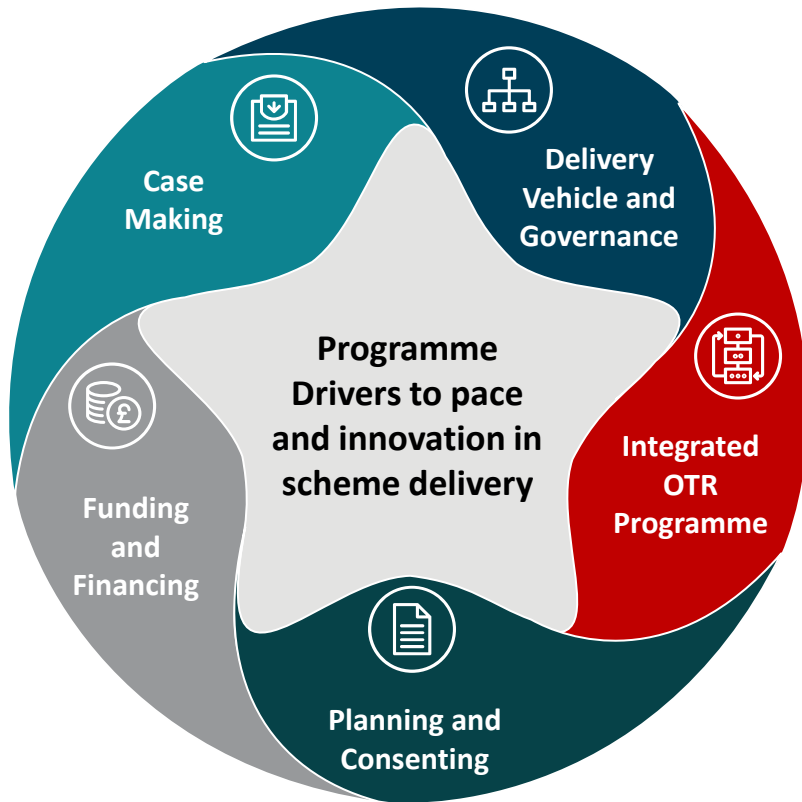
Any route that is implemented across OTR projects to achieve planning consent for transport infrastructure, should ensure consideration is made to the whole OTR area, particularly if this area is defined in a planning framework (Project D). This will help to de-risk the programme through consenting, support with positive stakeholder engagement, and identify any critical constraints at an early stage in the programme to provide time for mitigations to be developed.

DECISIONS AND NEXT STEPS

- Tripartite to agree commissioning for OTR Transport Framework Document
- Project E Transport working group to be established for TfGM, TMBC LPA and Tripartite



A set of **drivers** have been identified to **maintain momentum and de-risk** the programme



The drivers will underpin a set of **critical next steps** for effective transitioning from feasibility to development

Project A: The Stadium	<ul style="list-style-type: none"> <input type="checkbox"/> Preparation for MUFC Owners decision on preferred stadium option by end of season <input type="checkbox"/> Business planning, funding, and commercial case development for the stadium option <input type="checkbox"/> Continued fan and community engagement on emerging stadium option
Project B: The Stadium District	<ul style="list-style-type: none"> <input type="checkbox"/> Agree optimum land use mix that: delivers objectives, including regeneration benefits, and complements the wider development pipeline across Trafford and Salford <input type="checkbox"/> Stadium District to be defined (inc. / exc. third party land parcels) – Tripartite agreement to be reached and area to be identified within future OTR Framework
Project C: Freight	<ul style="list-style-type: none"> <input type="checkbox"/> Development of a freight relocation business case to support the long-term regeneration objectives of Old Trafford Regeneration, and transport benefits for the North-West and UK.
Project D: Trafford Wharfside	<ul style="list-style-type: none"> <input type="checkbox"/> Tripartite endorsement of revised OTR Framework area and terminology <input type="checkbox"/> Trafford Council to outline emerging Local Plan policy scope; including required third party information and programme <input type="checkbox"/> Tripartite endorsement of proposal to develop a Strategic Development Framework for OTR area, including purpose and scope. <input type="checkbox"/> Early engagement of key stakeholders to inform emerging policy and guidance, including landowners, businesses and residents
Project E: Transport	<ul style="list-style-type: none"> <input type="checkbox"/> Decision to commission a Transport Framework Document for the OTR area <input type="checkbox"/> Identify interdependences between OTR transport infrastructure and the wider Western Gateway as part of the next stage of transport analysis. <input type="checkbox"/> Integrate future transport planning activities with existing work that has taken place for the stadium and Stadium District.
OTR Programme	<ul style="list-style-type: none"> <input type="checkbox"/> Progress transition sprint to mobilise Stage 2 workstreams <input type="checkbox"/> Coordinated OTR Stakeholder Consultation Strategy <input type="checkbox"/> Commissioning and resourcing of required workstreams and appointments <input type="checkbox"/> Decision to establish a Mayoral Development Corporation to act as the OTR delivery vehicle

MAINTAINING PROGRAMME MOMENTUM |

As the programme moves between the two stages and evolves to suit the development needs of each project, it will be important to maintain some core activities to avoid undue delay. This will also help to maintain pace across stakeholder groups and demonstrate a continuum of activity and the prioritisation of the programme, while new technical workstreams are stood up to support with the next phase.

