



2018 FIFA World Cup™
Bid Evaluation Report:
England



**BIDDING NATION
ENGLAND**

FIFA®

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Please note that all of the information in this report is based on the Bid Book submitted on 14 May 2010 and the further clarifications received from the Bidder by 30 September 2010.

If there are any discrepancies in the interpretation of the English, French, Spanish or German text of this report, the English text is authoritative.

1. Letter from the chairman

Dear President,

Dear Executive Committee members,

The FIFA Evaluation Group for the 2018 and 2022 FIFA World Cup™ bids is pleased to present its evaluation of England's bid to host the 2018 FIFA World Cup™. In all, nine bids, including two joint bids, have been submitted. Please find in the following pages the evaluation of England's bid, together with an explanation of the fact-finding process.

FIFA's bidding process is based on the principles of transparency and equality, and the Bidders received rules as well as guidance from FIFA in order to ensure comprehensive and specific documentation of their candidature.

We greatly appreciated the warm welcome and the cooperation we received from the Bid Committees and the people in each of the

11 countries during the bidding process, and especially their determination to fulfil all of our requirements. I would also like to express my gratitude to all the members of the Evaluation Group for their dedication, energy, expertise and friendship during the time that we have spent together over the past six months. These words of thanks also extend to the FIFA staff members who have played a major part in bringing this project to a successful conclusion.

We feel we have accomplished our work in the spirit of integrity, objectiveness and transparency.



Harold Mayne-Nicholls
Chairman of the FIFA Evaluation Group for the 2018 and 2022 FIFA World Cup™ bids

2. Scope and key dates

As part of the bidding process, FIFA requested each Bidder to provide Bidding Documents containing information on infrastructure, legal conditions and operational and legacy concepts for the organisation of a FIFA World Cup™. This Bid Evaluation Report evaluates the information provided in the Bidding Documents, indicates the extent to which the requirements have been fulfilled, and identifies potential gaps and risks in respect of FIFA's requirements for hosting a FIFA World Cup™.

The report is based on an unbiased assessment, taking into account FIFA's experience of hosting and staging previous editions of the FIFA World Cup™, the information, proposals and statements provided by the Bidder and the information gathered during the on-site inspection tour by means of sample assessment of the venues and facilities.

Nine Bidders have been evaluated based on the Bidding Documents submitted and the inspection visits, which were undertaken with the aim of clarifying and verifying specific areas of infrastructure.

Key dates of the bidding process

16 March 2009	Registration of The FA's bid for the 2018 or 2022 FIFA World Cup™
18 September 2009	Establishment of the Bid Committee
11 December 2009	Signature of the Bidding Agreement
14 May 2010	Submission of the Bidding Documents to FIFA
23-26 August 2010	FIFA inspection visit to England
18 October 2010	Withdrawal of the The FA's bid for the 2022 FIFA World Cup™
2 December 2010	Appointment by the FIFA Executive Committee of the host countries for the 2018 FIFA World Cup™ and the 2022 FIFA World Cup™

3. Executive summary

The England bid's legacy is based on the establishment of "Football United", a global fund associated with the FIFA World Cup™ and aimed at driving positive global social change and development. The bid's hosting concept proposes two FIFA Fan Fest™ sites per candidate Host City, with one site specifically tailored to families. The bid is supported by the national and local football authorities, the local city governments (by virtue of duly executed Host City Agreements), the stadium authorities (by virtue of duly executed Stadium Agreements) and the national government (by virtue of duly executed Government Guarantees).

The bid proposes 12 candidate Host Cities and 17 stadiums, thus exceeding FIFA's minimum requirement. Five of the 17 stadiums already exist and would be renovated, five are to be built or are already under construction, and seven are built with no further renovation indicated. A stadium construction and renovation budget of USD 2.54 billion has been projected.

In terms of football development, the Bid Book puts forth a range of initiatives targeted at England and other parts of the world. Focus areas include school sport, physical education and grassroots football. English football is respected worldwide and its teams have recorded various successes at club and international level. England has experience in hosting large-scale international sports events in the last 20 years, including the UEFA EURO

1996 and the 2002 Commonwealth Games in Manchester. In addition, England will host the upcoming 2012 Summer Olympic Games and the 2015 IRB Rugby World Cup. England was also the host country of the 1966 FIFA World Cup™.

The Bidder has not contracted the required number of venue-specific training sites (VSTS) or venue-specific team hotels (VSTH). The Bidder has contracted the required number of team base camp (TBC) training sites but has not contracted the required number of TBC hotels. Additional training sites, likely to be selected from England's existing range of professional club stadiums and training sites, may have to be considered. The proposed TBC renovations would have to be ensured, and some pairings should be reviewed.

In terms of accommodation, the Bidder proposes a relatively large inventory. However, the fact that not many of the rooms have been contracted in full compliance with FIFA's template Hotel Agreement requires further analysis and potentially renegotiation. FIFA could be exposed to excessive pricing and booking conditions and the constituent groups may choose not to use the relevant properties. The Bidder has submitted a suitable proposal for the FIFA headquarters pending the contracting of additional hotel rooms.

Although England does not have an extensive high-speed rail network, it has a high level of domestic and international accessibility, with an

extensive rail and road network and two major international airports in London Heathrow and Manchester.

It appears that the country's IT infrastructure would meet FIFA's IT requirements.

International standards for major event safety and security and for health and medical services are likely to be met.

The Bidder has submitted concepts for initiatives pertaining to sustainable social and human development and environmental protection.

The Bidder has also submitted suitable proposals for competition-related event venues in seven cities.

Marketing, media and communication matters have also been addressed. The information provided in the Bid Book suggests that England is the leading football sponsorship market in the world and one of the biggest markets for major sports event sponsorship in the world. In terms of TV rights, the current listed-event regulations in the United Kingdom, which adversely affects the free and unrestricted exploitation of media rights, needs to be suspended in accordance with the undertakings given in Government Guarantee No. 6 (Protection and Exploitation of Commercial Rights). Should the FIFA World Cup™ be hosted in Europe, the TV ratings in Europe and the European media rights income are likely to be secured.

The Bidder has submitted an expenditure budget of USD 722.9 million (current) for a FIFA Confederations Cup and FIFA World Cup™ in 2017 and 2018. The budget has been submitted in the format required with supporting information. A projection of approximately 3,397,000 sellable tickets has been made.

If England is awarded the hosting rights, FIFA's legal risk appears to be low. The requirements for contractual documents have been met and the necessary government support has been secured with the exception of the reservations and qualifications to four Government Guarantees as contained in the Government Legal Statement, the U.K. Government has been given the opportunity to gain experience in supporting the hosting and staging of major sports events and to show its willingness to make material concessions and accommodate the concerns of event organisers.

4. Bid Evaluation Report

Responding to the requirements set out by FIFA in the bid registration, The Football Association (The FA) established a Bid Committee to handle the bidding process. The Bidding Documents were submitted to the FIFA President on 14 May 2010. The inspection visit took place from 23 to 26 August 2010, and the FIFA inspection team were present in the country for approximately 72 hours in total.

The visit was well structured and comprehensive information was provided. The itinerary included London, Darlington, Sunderland, Newcastle and Manchester. In London, the team visited Wembley Stadium, the proposed venue for the opening match and final, and the proposed venues for the Final Draw, the International Broadcast Centre (IBC) and the Congress, as well the FIFA headquarters hotel. In Darlington, it inspected a proposed team base camp, while in Sunderland and Newcastle, it visited the Stadium of Light and St James' Park respectively. In Manchester, the team inspected the City of Manchester Stadium and Old Trafford Stadium, as well as a proposed venue for the Preliminary Draw and a proposed venue-specific team hotel. The observations made during this inspection visit are included in the Bid Evaluation Report that follows.

4.1 Bidding Country and Host Cities

England has a population of 51 million. It has a UTC of +/-0 and observes daylight saving time of UTC+1. The country's official language is

English, although more than 300 languages are spoken in the community.

England forms part of the United Kingdom (U.K.), which is a constitutional monarchy and unitary parliamentary democracy. The U.K. Parliament is the supreme legislative body and it alone possesses legislative supremacy over all other political bodies in the U.K. and its territories. At its head is the sovereign, the Queen. The parliament has an upper house, the House of Lords, and a lower house, the House of Commons. The Queen is the third component of the legislature.

National policy is set by central government, but local councils are responsible for day-to-day services and local matters. The main link between local authorities and central government is the Department of Communities and Local Government. This department is

Name of Host City	No. of inhabitants	Language	Altitude
Birmingham	1,016,800	English	133m
Bristol	421,300		59m
Leeds	770,800		10–340m
Liverpool	434,900		26m
London	7,619,800		43m
Manchester	2,573,500		62m
Milton Keynes	232,000		159m
Newcastle-Gateshead	464,200		55m
Nottingham	292,400		117m
Plymouth	252,800		50m
Sheffield	534,500		94m
Sunderland	280,300		80m

Source: Template 2

included in the England 2018 Government Delivery Partnership established to manage FIFA World Cup™ issues at a local, regional and national level, and comprises key participants such as the Department of Culture, Media and Sport, and the heads of all candidate Host Cities and the Local Government Association. The more than 370 local authorities in England are responsible for providing education, housing, social services, environmental services, local planning and arts and leisure services. Each candidate Host City is represented by its own local authority, except Newcastle-Gateshead and Sunderland, and Sheffield and Leeds, respectively, which share Metropolitan Districts. The U.K. economy is one of the largest in the world. It is usually regarded as a mixed market economy, although it has adopted many

free market principles. England's economy is the largest part of the U.K. economy, and is a market leader in the chemical and pharmaceutical sectors as well as in key technical industries such as aerospace, the arms industry and the manufacturing side of the software industry. In 2009, the U.K.'s GDP per capita was approximately USD 35,000 and its estimated unemployment rate was 7.6%.

General information on the Host Cities

The 12 candidate Host Cities for the FIFA World Cup™ are London, Manchester, Birmingham, Liverpool, Newcastle-Gateshead, Sheffield, Leeds, Bristol, Sunderland, Plymouth, Milton Keynes and Nottingham. England has a largely urban population. Its capital city, London, forms part of the Greater London Area, one of the largest urban areas in

Time zone	Average temperature in June (°C)				Average temperature in July (°C)				Average peak humidity in June (%)	Average peak humidity in July (%)
	12 p.m.	4 p.m.	6 p.m.	10 p.m.	12 p.m.	4 p.m.	6 p.m.	10 p.m.		
UTC-0	17.7	18.5	17.7	14.0	19.4	20.0	19.4	15.2	82.0	83.0
UTC-0	17.5	17.6	16.8	13.8	19.0	19.1	18.1	15.3	80.2	81.3
UTC-0	16.0	15.0	15.0	10.0	15.0	15.0	15.0	12.0	71.0	88.0
UTC-0	16.7	17.2	16.4	14.0	18.4	18.7	18.1	15.4	82.0	84.0
UTC-0	18.5	20.2	19.6	16.8	20.5	22.1	21.6	19.0	63.0	63.0
UTC-0	16.0	16.7	16.2	12.1	18.1	18.7	17.9	14.9	81.0	84.0
UTC-0	16.8	18.0	17.4	14.3	19.2	20.1	19.5	16.3	74.7	73.9
UTC-0	17.5	16.5	13.0	10.3	19.7	18.0	14.0	12.5	74.0	79.0
UTC-0	16.5	17.3	16.6	13.3	18.8	19.5	18.8	15.2	78.0	84.0
UTC-0	21.8	21.6	19.8	16.0	15.7	16.4	16.1	14.8	75.5	92.6
UTC-0	16.2	16.9	16.1	13.3	18.4	19.0	18.5	15.4	73.3	79.2
UTC-0	15.0	18.1	15.0	13.0	17.0	19.6	17.0	15.0	74.0	79.0

the world with a population of approximately 8.5 million.

England's climate is influenced by its proximity to the Atlantic Ocean, particularly the warm current of the Gulf Stream, and its northern latitude. The country has a temperate maritime climate, with mild summers and frequently damp weather which is subject to change, particularly on the coast. July is normally the warmest month. Although England receives significant precipitation during the year (autumn and winter are the wettest seasons), weekly precipitation is frequent but moderate during June and July, with an average temperature ranging from 18°C to 20°C and humidity of between 55% and 70%.

Main events

It is a FIFA requirement that no other major sporting event is hosted in a Host City during the event period and the fact that the Wimbledon tennis championships take place in London during late June/early July could have an impact on the public attention given to the FIFA World Cup™. No national holidays or celebrations take place during the tournament period in June and July.

as showcase training venues for public training sessions. At the heart of the bid's FIFA World Cup™ legacy is "Football United", a new global fund that aims to unite people everywhere through the power of football. It would raise funds and awareness to drive lasting positive social change and develop the game around the world. The Bidder claims that all FIFA World Cup™ ticket categories would be sold out, pointing to over 30 million filled seats at professional football matches in English stadiums in 2008-09. Many international football associations have played "home" international matches in England recently precisely due to the country's rich football culture, long heritage in the game and the modernity of its stadiums. England has considerable experience of hosting large-scale international events, including the UEFA EURO 1996 and the 2002 Commonwealth Games in Manchester. In addition, England will host the 2012 Summer Olympic Games and IRB Rugby World Cup in 2015.

In the event that England is awarded the hosting rights, further analysis of the main proposals would be required to ensure consistency and alignment with FIFA's Commercial Rights Programme.

4.2 Hosting concept

England has submitted a comprehensive hosting concept, proposing 17 stadiums in 12 candidate Host Cities.

Families would be central to the planning of a new two-site FIFA Fan Fest™ concept, with one per city specifically tailored to their needs, many linked to camping and family-oriented accommodation. Worldwide access to the FIFA Fan Fests™ is proposed through an official FIFA Fan Fest™ TV service, in addition to radio channels broadcast locally and streamed globally. The Bidder would make a number of its iconic (football and non-football) stadiums available

4.3 Football development

England has submitted good proposals on how to develop football domestically and all over the world and sets measurable growth figures. A substantial amount would also be invested in international football development.

The bid mentions the following development activities:

- a) a development plan to inspire a new generation of home-grown talent (players, coaches, administrators, etc);
- b) an estimated investment by various stakeholders, including public authorities, of USD 1.1 billion over 18 years in grassroots

Football honours (men's national teams)

Competition	Honour	Year(s)
FIFA World Cup™	1 x winners	1966
	1 x 4 th place	1990
	13 appearances	1950, 1954, 1958, 1962, 1966, 1970, 1982, 1986, 1990, 1998, 2002, 2006, 2010
FIFA U-20 World Cup	1 x 3 rd place	1993
	1 x 4 th place	1981
Olympic Football Tournament (as Great Britain)	3 x Gold	1900, 1908, 1912

football projects in England, focusing on disability, youth and recreational football, as well as facility development;

- c) wider access to football for every girl in England and a new semi-professional Women's Super League;
- d) four global taskforces of football expertise to support the four core areas of FIFA's Member Association Professionalisation Programme backed up by an online football learning centre;
- e) an International Centre for Disability Football and a global taskforce to help FIFA lead the improved integration of disability football.

The English football family has been supporting international development in 90 countries in every confederation in the last ten years and has a worldwide presence either through The FA, the Premier League or the professional clubs. The Bidder's proposals would have a strong impact on football development both at home and worldwide. A joint FIFA/MA development committee would have to be established to maximise the impact of the bid's international development proposals.

4.4 Sustainable social and human development

The information provided is complete and detailed, and includes a description of existing social and human development programmes supported by The FA and the English football family. Comprehensive information is given about the sustainable social and human development plans in general and various programmes in particular. A delivery structure including the LOC is also presented.

The objective of the Bidder's programme is to create positive change in England and worldwide. The proposals include the creation of a global fund for football development and development through football; support for the expansion of the Football for Hope movement; the creation of a global network of "learning zones" to promote education; a widening of the activities of the David Beckham Academy to promote life skills; measures to fight discrimination and promote social integration; and the influencing of international policy. At national level, the focus would be on

anti-discrimination and social integration, health promotion, and the fight against long-term health threats. These programmes would be supported by communication measures and awareness-raising activities. Numerous sustainable programmes are described, including an innovative funding mechanism for social development initiatives linked to the FIFA World Cup™. Monitoring and evaluation is mentioned as an integral part of the legacy effort.

The bid demonstrates a good understanding of FIFA's corporate social responsibility (CSR) initiatives and of the Football for Hope movement. The stated support of the U.K. Government's Department for International Development is positive. However, no details are provided as to how this collaboration would work in practical terms. In addition, other possible strategic partners with relevant experience are mentioned.

The FA is already active in the field of CSR and supports a number of social development programmes, which underlines its commitment and sense of responsibility. The programmes and campaigns described are proof of the expertise that The FA and other English institutions have in this area.

The projected global fund would be an innovative tool for a FIFA World Cup™ and the idea of continued management of the fund by future FIFA World Cup™ hosts is interesting. However, there is no analysis of the challenges linked to the overlapping periods of legacy activities of the FIFA World Cups™. The proposals appear to be realistic in terms of meeting the bid's objectives. More details could have been provided about the plans to influence international policy. By integrating the suggested organisational structure into both the strategic and operational levels of the organising committee, the Bidder demonstrates the importance it has attached to sustainable social and human development.

4.5 Environmental protection





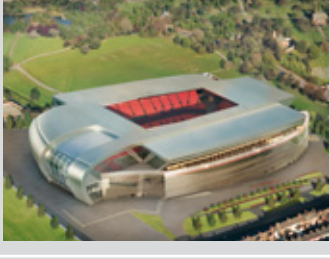

England provides information on all of the requested aspects, including a table that outlines the overall targets, issues, methods, activities and legacies across all six core topics. The Bidder commissioned an independent carbon footprint analysis covering event preparations, competitions and international travel. The responsibilities for emissions have been broken down into "owned", "shared" and "associated". To achieve the most sustainable FIFA World Cup™ to date, the Bidder has created an environmental sustainability plan with the support of The FA, the candidate Host Cities, international experts and numerous stakeholder groups.








The strategy aims to maximise the commercial benefits and secure financial commitment from the cities to delivering the lowest carbon FIFA World Cup™. The outreach programme would include educational workshops across England and an annual stakeholder report to improve coordination and the buy-in of stakeholders. Supporters would be engaged through social media and candidate Host City-based programmes. The Environmental Sustainability Advisory Board would have overall responsibility for ensuring a balanced approach to environmental, social and economic aspects. The integration of environmental sustainability within the LOC would be strengthened through a dedicated team and the continued education and involvement of LOC staff in environmental activities.





Highlighting the commercial benefits of environmental protection would help create additional incentives for all stakeholders involved. The LOC's division of the emissions into three categories of responsibility would help the complexity of an environmental plan of this size to be grasped. However, it is unclear how these categories fit into the plan.

The LOC would be able to draw on the experience that it will gain from the Summer Olympic Games 2012 and the world's first standard for sustainable event management, developed in England, to implement its environmental sustainability plan.

4.6 Stadiums

	<p>Host City: Birmingham ① Stadium name: Villa Park Current net/gross capacity (VIP/Media/loss of seats): 41,478/42,788, (1210/400/0) Expected net/gross capacity: 42,400/47,300 Construction status: Minor renovation Lighting: 1,400 lux Owner/Investors/Investment budget: Aston Villa Limited/Aston Villa Limited/USD 46m Current use: Aston Villa F.C.</p>
	<p>Host City: Bristol ② Stadium name: Ashton Vale Current net/gross capacity (VIP/Media/loss of seats): 43,000/44,000, (600/400/0) Expected net/gross capacity: 40,300/44,000 Construction status: Minor renovation Lighting: 2,000 lux Owner/Investors/Investment budget: Ashton Gate Ltd/Bristol City F.C. and Bristol City Council/USD 134m + USD 13m Current use: Bristol City F.C.</p>
	<p>Host City: Leeds ③ Stadium name: Elland Road Current net/gross capacity (VIP/Media/loss of seats): 47,000/51,240 (600/300/2,170) Expected net/gross capacity: 30,310/39,410 Construction status: Major renovation Lighting: 2,000 lux Owner/Investors/Investment budget: Teak Commercial/Leeds United Football Club Limited and Leeds City Council/USD 49.75m + USD 37.25m Current use: Leeds United F.C.</p>
	<p>Host City: Liverpool ④ Stadium name: Anfield Current net/gross capacity (VIP/Media/loss of seats): 41,627/45,362 (635/100/3000) Expected net/gross capacity: 40,000/45,362 Construction status: Built, with no further renovation indicated Lighting: 1,400 lux Owner/Investors/Investment budget: Liverpool F.C./No investors/USD 0m Current use: Liverpool F.C.</p>
	<p>Host City: Liverpool ⑤ Stadium name: New Anfield Current net/gross capacity (VIP/Media/loss of seats): 71,826/72,334 (308/200/0) Expected net/gross capacity: 68,500/72,334 Construction status: To be built Lighting: 3,000 lux Owner/Investors/Investment budget: Liverpool FC/Liverpool Football Club & Athletic Grounds Ltd/USD 800m Current use: To be used by Liverpool F.C.</p>
	<p>Host City: London ⑥ Stadium name: Emirates Stadium Current net/gross capacity (VIP/Media/loss of seats): 59,888/60,400 (400/112/0) Expected net/gross capacity: 55,141/60,400 Construction status: Built, with no further renovation indicated Lighting: 2,200 lux Owner/Investors/Investment budget: Arsenal F.C./No investors/USD 0m Current use: Arsenal F.C.</p>

	<p>Host City: London ⑦</p> <p>Stadium name: Olympic Stadium</p> <p>Current net/gross capacity (VIP/Media/loss of seats): 79,200/80,000 (400/400/0) Expected net/gross capacity: 72,000/80,000 Construction status: Under construction (to be ready for the 2012 Summer Olympics) Lighting: 2,000 lux Owner/Investors/Investment budget: Olympic Park Legacy Company/Olympic Park Legacy Company/USD 800m Current use: >To be determined</p>
	<p>Host City: London ⑧</p> <p>Stadium name: New White Hart Lane</p> <p>Current net/gross capacity (VIP/Media/loss of seats): 57,150/58,000 (740/110/0) Expected net/gross capacity: 53,000/58,000 Construction status: To be built Lighting: 2,000 lux Owner/Investors/Investment budget: Tottenham Hotspur F.C. plc/Tottenham Hotspur F.C. plc/USD 375m Current use: Tottenham Hotspur F.C.</p>
	<p>Host City: London ⑨</p> <p>Stadium name: Wembley Stadium</p> <p>Current net/gross capacity (VIP/Media/loss of seats): 88,200/90,000, (1,300/500/0) Expected net/gross capacity: 84,700/90,000 Construction status: Built, with no further renovation indicated Lighting: 3,000 lux Owner/Investors/Investment budget: The FA Group/No investors/USD 0m Current use: England national team Matches planned: Opening match and final</p>
	<p>Host City: Manchester ⑩</p> <p>Stadium name: City of Manchester Stadium</p> <p>Current net/gross capacity (VIP/Media/loss of seats): 46,344/47,717 (506/500/367) Expected net/gross capacity: 43,350/47,717 Construction status: Built, with no further renovation indicated Lighting: 1,500 lux Owner/Investors/Investment budget: Manchester City Council/No investors/USD 0m Current use: Manchester City F.C.</p>
	<p>Host City: Manchester ⑪</p> <p>Stadium name: Old Trafford</p> <p>Current net/gross capacity (VIP/Media/loss of seats): 74,377/75,797 (1,300/120/0) Expected net/gross capacity: 67,000/75,797 Construction status: Built, with no further renovation indicated Lighting: 2,505 lux Owner/Investors/Investment budget: Manchester United F.C./No investors/USD 0m Current use: Manchester United F.C. Matches planned: Semi-final</p>
	<p>Host City: Milton Keynes ⑫</p> <p>Stadium name: Stadium:MK</p> <p>Current net/gross capacity (VIP/Media/loss of seats): 22,000 (planned extensions to 31,000 and 44,000) (450/70/0) Expected net/gross capacity: 40,300/44,000 Construction status: Minor renovation Lighting: 1,000 lux Owner/Investors/Investment budget: Stadium MK Ltd/Inter Mk Ltd/USD 36m Current use: Milton Keynes Dons F.C.</p>
	<p>Host City: Newcastle ⑬</p> <p>Stadium name: St James' Park</p> <p>Current net/gross capacity (VIP/Media/loss of seats): 50,457/52,000 (970/190/383) Expected net/gross capacity: 48,500/52,000 Construction status: Built, with no further renovation indicated Lighting: 1,392 lux Owner/Investors/Investment budget: Newcastle United F.C. Limited/No investors/USD 0m Current use: Newcastle United F.C.</p>

	<p>Host City: Nottingham (14) Stadium name: New Nottingham Stadium Expected net/gross capacity (VIP/Media/loss of seats): 41,500/45,300 (1,504/328/0) Construction status: To be built Lighting: 2,000 lux Owner/Investors/Investment budget: Nottingham City Council/Nottingham City Council/ USD 175m Current use: To be used by Nottingham Forest F.C.</p>
	<p>Host City: Plymouth (15) Stadium name: Home Park Stadium Current net/gross capacity (VIP/Media/loss of seats): 16,316/19,500 (500/400/2,884) Expected net/gross capacity: 40,000/43,874 Construction status: Major renovation Lighting: 2,000 lux Owner/Investors/Investment budget: Plymouth Argyle F.C. Holdings Limited/Plymouth Argyle F.C.Holdings Limited/USD 75m Current use: Plymouth Argyle F.C.</p>
	<p>Host City: Sheffield (16) Stadium name: Hillsborough Stadium Expected net/gross capacity (VIP/Media/loss of seats): 40,000 43,946 (200/100/0) Construction status: To be built Lighting: 2,000 lux Owner/Investors/Investment budget: Sheffield Wednesday PLC/Sheffield Wednesday plc/ USD 14.3m Current use: Sheffield Wednesday F.C.</p>
	<p>Host City: Sunderland (17) Stadium name: Stadium of Light Current net/gross capacity (VIP/Media/loss of seats): 47,987/48,707 (1210/400/0) (600/120/0) Expected net/gross capacity: 44,207/48,707 Construction status: Appears to be ready to be used Lighting: 1,081 lux Owner/Investors/Investment budget: Sunderland A.F.C./No investors/USD 0m Current use: Sunderland F.C.</p>

Analysis and comments

- All stadiums would meet the pitch size requirements of 105 x 68 metres.
- All stadiums would have grass pitches.
- Seven stadiums (Wembley, Emirates, Old Trafford, City of Manchester, Anfield, St James' Park, Stadium of Light) are built with no further renovation indicated.
- Five stadiums (Villa Park, Elland Road, Home Park, Stadium:MK, and Hillsborough) would be renovated between 2012 and 2015; the design phase has already started and will continue until 2012.
- In addition to the Olympic Stadium, which will be completed in time for the 2012

- Summer Olympic Games, the new stadiums (New White Hart Lane, New Anfield, Ashton Vale, New Nottingham) would be completed from 2011 to 2016, with the design phase starting in 2010. Assurances have been given that FIFA's requirements would be fulfilled.
- Wembley Stadium would host the opening match and the final.
- All of the stadiums seem to have sufficient public transports links to their respective city centres.
- All of the stadiums (except the stadiums in construction, City of Manchester Stadium and Elland Road) do not currently seem to meet FIFA's seating requirement for the media.

- FIFA's space requirements for offices seem to be fulfilled in every stadium.
- In general, the stadiums would have to be upgraded to meet FIFA's space and technical requirements.

Local transport

The stadiums are generally spread evenly across the country and there is a wide range of transport links (airports, railways and motorways) between the relevant cities. There are many different public transport connections between the stadiums and the city centres. However, additional temporary event transport operations, as well as traffic reduction measures, may be required.

Contractual basis with the stadiums

Unilaterally executed Stadium Agreements have been provided by all 17 proposed stadiums. All such Stadium Agreements fully comply with the template Stadium Agreement without any deviation.

Conclusion

The English Bid proposes 12 candidate Host Cities and 17 stadiums, thus exceeding FIFA's minimum requirement. Five of the 17 stadiums already exist and would be renovated, five are to be newly built or are already under construction, and seven are built with no further renovation indicated. A stadium construction and renovation budget of approximately USD 2.54 billion has been projected. Four stadiums are proposed within London, which in the case of an appointment of England would require careful analysis with regard to the match schedule.

Analysis of the internal organisation of the stadiums and their infrastructures raises some questions about the limited space available to welcome the various constituent groups. Likewise, there seems to be a lack of space in the areas in and/or around some of the stadiums to accommodate the temporary event structures. On the other hand, given the

large amount of space already dedicated to hospitality inside some stadiums, less space may be needed outside. In any case, if England is awarded the hosting rights for the 2018 FIFA World Cup™, specific attention would have to be given to the fulfilment of future FIFA World Cup™ space and quality requirements, especially in terms of the technical requirements and the hospitality and commercial programmes.

4.7 Venue-specific team hotels and venue-specific training sites

The Bid Book and supporting documents provide comprehensive information on all the venue-specific team hotels (VSTH) and venue-specific training sites (VSTS) proposed.

The bid proposes 54 VSTHs, which exceeds the required number of 34 based on the Bidder's plan for 17 stadiums. The hotels proposed include five three-star, 46 four-star and three five-star properties, and generally, FIFA's requirements in terms of quality appear to be fulfilled. Travel times from the VSTHs to the airports appear to meet the requirements. Travel times to stadiums exceed the 30-minute requirement in five cases, however, given the excess number of VSTHs proposed, the requirement may still be met in each venue. Likewise, the additional hotel choices in each venue allow balanced VSTH pairings to be made with respect to quality as well as proximity (to stadiums and training sites). All hotels appear to have a sufficient number of guest rooms to meet team needs.

The bid proposes 54 VSTSs, 4 fewer than the required number (58) based on the Bidder's plan for 17 stadiums. The Bidder has effectively paired one VSTH with one VSTS, hence currently over-delivering on VSTHs but under-delivering on VSTSs. Furthermore, eight sites listed as VSTSs are also listed as TBC training sites, potentially reducing the total further. The

quality of the VSTs proposed, however, is of a high standard as 40 are existing football club stadiums, including some from the highest professional level. Given the high standard, most of the quality requirements appear to be met. The most common renovations would include upgrading the lux levels to meet FIFA's lighting requirements and enlarging some training rooms. The proximity requirement between VSTs and VSTHs does not appear to be met in five cases, however in each venue it is still possible to find two VSTH-VST pairings that satisfy the requirement because each venue offers a sufficient number of acceptable pairings.

In conclusion, the VSTHs proposed by England exceed the quantity requirements and appear to meet the quality requirements. The VSTs, however, fall short of the quantity requirement, but could nonetheless meet the final selection criteria of three sites per venue (two plus one alternative). Furthermore, the quality standard of the VSTs appears to be high, and the number of upgrades necessary to meet all requirements appears to be minimal.

Contractual basis

Of the required 34 VSTHs, the Bidder has contracted 31. Of the required 68 VSTs, the Bidder has contracted 54. According to the Bidder, all Hotel Agreements comply fully with the corresponding template Hotel Agreements without any deviation. All Training Site Agreements comply fully with the template Training Site Agreement without any deviation.

4.8 Team base camp hotels and team base camp training sites

The Bid Book and supporting documents provide comprehensive information on the team base camps (TBC) proposed. The England bid proposes 89 TBC hotels and 129 training sites, thus exceeding FIFA's requirement of 64 pairings.

All hotels are paired with one private training site for exclusive use, plus an additional site for public training sessions which would be shared amongst a number of teams. All TBC pairings are part of "clusters", meaning that the hotels and training sites are linked with supporting accommodation, hospitals and airports. In addition, the Bid Book prioritises the offerings, highlighting 64 "tier 1" pairings (i.e. primary choices), and lists the remaining offerings as "tier 2" supplementary sites.

According to the Bid Book, a number of the hotels have experience of hosting high-profile sports teams. The properties all appear to be of a high standard. The tier 1 hotel list is comprised of five three-star, 51 four-star and eight five-star properties. An ideal balance might include a greater percentage of five-star choices. The average hotel size of the tier 1 properties is 140 rooms, but 19 have 100 rooms or less.

The prevailing principle of the Bidder's TBC concept is that each visiting team would be partnered with, or hosted by, a local professional club in their cluster. Typically, the host club's training facilities would be used by the visiting teams, including an exclusive site for private training sessions as well as a site for their public training sessions. It should be noted that some of the public training sites are also listed as VSTs selections, which could be accepted provided operational requirements are taken into account. Though the Bid Book suggests that all hotels and private training sites are within 20 minutes' travel time of one other, the documents show the average distance between the tier 1 sites to be 18km (24km for the tier 2 hotels). While four training sites are located on the grounds of the hotel, 19 other pairings are greater than 25km apart, distances which suggest extended trips in the team bus. As the training sites are existing facilities of football clubs, the upgrades necessary to meet FIFA requirements would appear to be minimal, and would primarily include higher lighting levels, dressing room refurbishment

and potential installation of stands to accommodate media at the private training sites.

In conclusion and acknowledging that renovations would be necessary in the intervening period, the bid appears to comply with FIFA's requirements for team base camps (hotels and related training sites). The proximity of the hotels to training sites could be improved, and the current pairings might therefore merit further consideration.

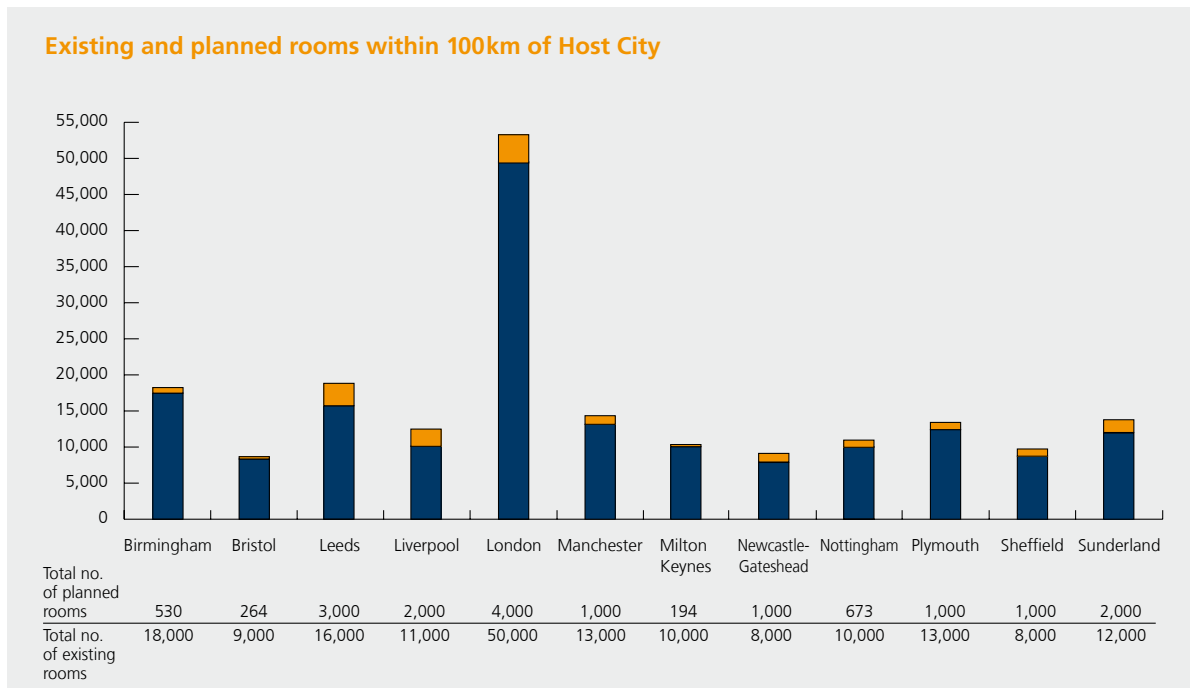
Contractual basis

Of the required 64 TBC hotels, the Bidder has contracted 47. The number of TBC training sites contracted by the Bidder exceeds the required number of 64. According to the Bidder, all Hotel Agreements comply fully with the corresponding template Hotel Agreements without any deviation. All Training Site Agreements comply fully with the template Training Site Agreement without any deviation.

4.9 Accommodation

England proposes a comprehensive accommodation plan. Tourism is one of England's main sectors and the country attracts almost 30 million visitors a year. Accordingly, the accommodation infrastructure is well developed across all quality categories.

The information provided in template 11 includes a breakdown of more than 2,200 different accommodation providers proposing more than 190,000 rooms, mainly in the three and four-star category, but also in all others. Seventy-five per cent of all five-star hotels listed are located in London. In total, around 18,000 rooms are indicated as still to be built. Most of them would be completed by the end of 2016. The Bid Book states a higher total of 396,000 existing rooms and also mentions alternative accommodation options such as schools and dormitories. The



Source: Template 11

(Figures rounded up or down to the nearest 1,000)

total potential capacity of each candidate Host City appears to be sufficient. The largest concentration of rooms is listed in and around London.

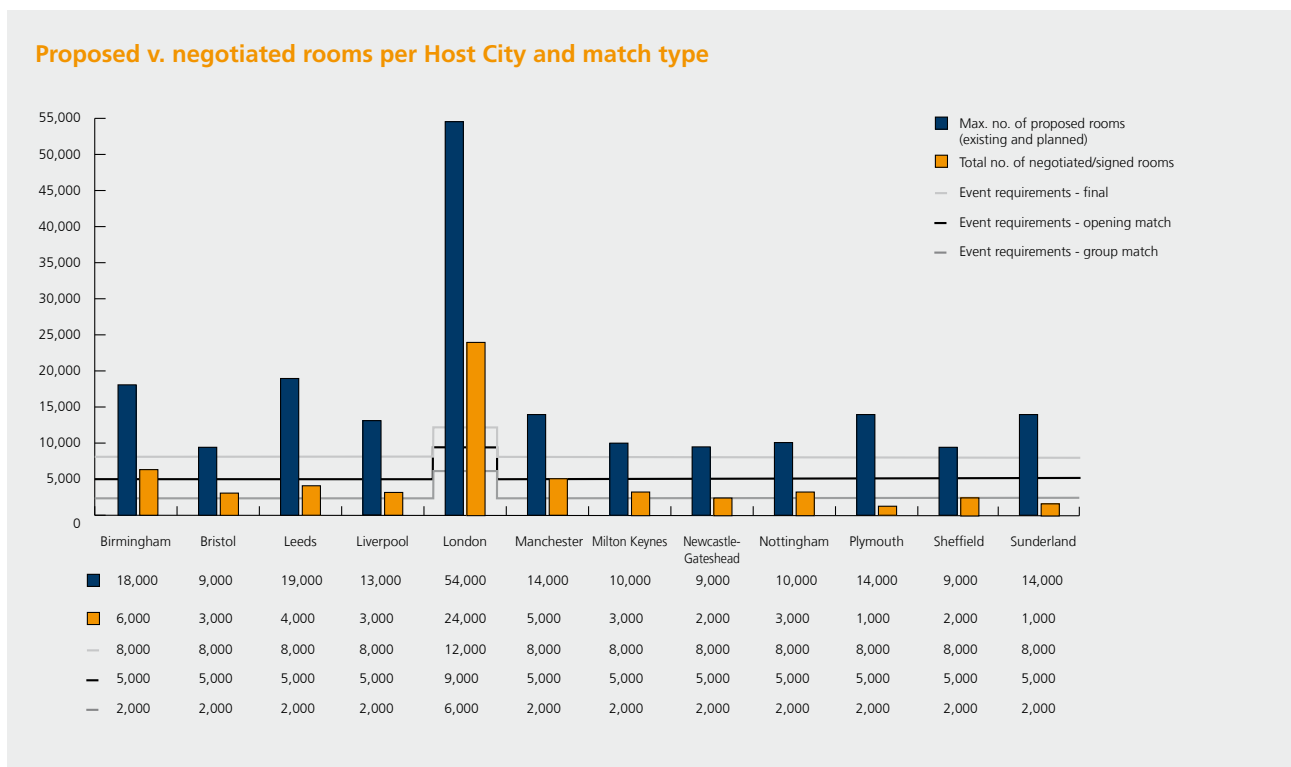
Of the 190,000 rooms identified, over 58,000 are indicated as having been contracted, in addition to those indicated as having been contracted in team base camp hotels (approximately 3,100 rooms). However, the Bidder has not contracted many of these rooms in full compliance with the template Hotel Agreement. All hotel contracts require further analysis to assess any potential modifications, and terms and conditions may have to be renegotiated by FIFA. FIFA could be exposed to excessive pricing and booking conditions and the constituent groups may choose not to use the relevant properties. On average, the properties indicated as having been contracted have made 65% of their entire inventory available, compared to the required 80%. Even taking into account the number of contracted properties indicated by the Bidder,

Newcastle-Gateshead, Sunderland and Plymouth currently do not meet the event requirements for a group match. Their relatively remote location suggests that visitors might have to accept longer travel distances (of up to three hours) to Leeds/Manchester or Bristol/London. With the exception of London, no candidate Host City currently meets the event requirements for an opening match (or other comparable matches up to a semi-final).

The Bidder indicates the current market prices as follows (average):

- 5-star USD 403 (London) to USD 240 (Manchester)
- 4-star USD 290 (Sheffield) to USD 180 (Nottingham)
- 3-star USD 290 (Manchester) to USD 130 (Nottingham)

In summary, the Bidder proposes a relatively large inventory. However, the fact that not many of the rooms have been contracted in full compliance with FIFA's template Hotel Agreement requires



Source: Template 11

(Figures rounded up or down to the nearest 1,000)

FIFA Hotel Agreements have been signed for some of the negotiated rooms
 Event requirements do not include requirements for supporters and team base camp hotels
 IBC room requirements included in figures for London

further analysis and potentially renegotiation. FIFA could be exposed to excessive pricing and booking conditions and the constituent groups may choose not to use the relevant properties.

4.10 FIFA headquarters

The Bid Book proposes locating the FIFA headquarters in several five-star hotels clustered around Park Lane in London. The information provided includes a detailed map indicating the locations of the suggested offices and hotels. The proposed FIFA headquarters hotel would be spread over two neighbouring hotels: the Dorchester Hotel, which has 250 rooms (192 of which are contracted) and London Hilton on Park Lane, which has 453 rooms (287 of which

are contracted). The proposed VIP hotel, 45 Park, has 50 exclusive suites. The hotels are centrally located. The number of contracted rooms is 479 which is 221 rooms short of FIFA's requirement of 700 guest rooms. Therefore, additional rooms would need to be contracted for the FIFA headquarters hotel and VIP hotel.

Transport links are very good, with London Heathrow airport 24km away, London City airport 17km away and Wembley Stadium only 13km away.

The proposal is to provide the 8,000m² of office space required by FIFA for the FIFA headquarters in bespoke premises in serviced commercial offices available on a short-rental basis. The offices would all be equipped with the latest technology and air-conditioning, and meeting rooms and break rooms would be incorporated into the office plans. An agreement has been made with the landowners

Travel distance between Host Cities

	Nottingham		Bristol		Milton Keynes		Plymouth		Leeds	
London	216 km	1 h 45 min.	200 km	1 h 45 min.	92 km	30 min.	404 km	3 h	331 km	2 h 10 min.
	2 h 35 min.		2 h 25 min.		1 h 25 min.		4 h 25 min.		3 h 40 min.	
Manchester	118 km	1 h 55 min.	284 km	3 h	258 km	1 h 40 min.	476 km	5 h 40 min.	74 km	55 min.
	1 h 45 min.		3 h 05 min.		2 h 50 min.		5 h.		55 min.	
Liverpool	187 km	2 h 55 min.	304 km	3 h 45 min.	281 km	2 h 30 min.	495 km	5 h 50 min.	123 km	1 h 55 min.
	2 h 05 min.		3 h 10 min.		2 h 50 min.		5 h		1 h 20 min.	
Newcastle-Gateshead	272 km	3 h 10 min.	500 km	5 h 20 min.	399 km	4 h 35 min.	693 km	7 h 15 min.	167 km	1 h 35 min.
	2 h 50 min.		5 h 10 min.		4 h 05 min.		7 h		1 h 50 min.	
Sunderland	261 km	3 h 55 min.	490 km	5 h 50 min.	389 km	5 h 10 min.	682 km	7 h 55 min.	157 km	2 h 15 min.
	2 h 50 min.		5 h 10 min.		4 h		7 h		1 h 45 min.	
Birmingham	86 km	1 h 15 min.	155 km	1 h 25 min.	119 km	1 h 15 min.	347 km	3 h 35 min.	202 km	2 h
	1 h 10 min.		1 h 40 min.		1 h 20 min.		3 h 35 min.		1 h 05 min.	
Sheffield	74 km	55 min.	303 km	2 h 45 min.	202 km	2 h 30 min.	495 km	4 h 55 min.	59 km	50 min.
	52 min.		3 h 15 min.		2 h 05 min.		5 h 05 min.		43 min.	
Leeds	122 km	1 h 55 min.	353 km	3 h 35 min.	253 km	2 h 50 min.	542 km	5 h 40 min.		
	1 h 20 min.		3 h 40 min.		2 h 35 min.		5 h 30 min.			
Plymouth	428 km	5 h 15 min.	208 km	2 h 15 min.	399 km	5 h 20 min.				
	4 h 30 min.		2 h 15 min.		4 h 25 min.					
Milton Keynes	281 km	1 h 40 min.	197 km	3 h						
	2 h 30		2 h 25 min.							
Bristol	236 km	3 h 05 min.								
	2 h 40 min.									

Source: Template 12

to ensure that the offices would be located in one building within walking distance of the FIFA headquarters hotel.

In conclusion, it appears that the English Bid Committee’s solution partially fulfils FIFA’s requirements based on the information provided in the Bid Book, although additional guest rooms would need to be contracted.

4.11 Transport

Transport at national level

The Bidder provided a generally clear transport concept based on its experience of hosting large-scale international events.

Despite its relatively small size, England has one of the most extensive railway networks

in Europe. Investment is being made to modernise the existing regional network (which currently carries almost 50 million passengers per year) by 2014. The electrification of key rail lines, such as the Crossrail project and Network Rail’s modernisation of the Thameslink service in the London area, as well as the modernisation of the Tyne and Wear “Metro” network in the Newcastle-Gateshead and Sunderland areas, will ensure faster journey times between candidate Host Cities. Despite this investment, England has a less extensive high-speed (i.e. speeds of up to 300km/h) rail network than other European countries. Its only operational high-speed connection is the Channel Tunnel Rail Link, which connects London to Paris or Brussels within two and a half hours. This limits inter-city transfer possibilities to road-based means of transport. With over 14,000km (8,700 miles) of

Sheffield		Birmingham		Sunderland		Newcastle-Gateshead		Liverpool		Manchester	
283 km	2 h 10 min.	201 km	1 h 25 min.	470 km	3 h 20 min.	480 km	2 h 55 min.	358 km	2 h 10 min.	340 km	2 h 15 min.
3 h 10 min.		2 h 30 min.		5 h 10 min.		5 h 10 min.		3 h 55 min.		3 h 53 min.	
69 km	1 h	147 km	1 h 40 min.	236 km	3 h 20 min.	246 km	2 h 35 min.	57 km	51 min.		
1 h 05 min.		1 h 50 min.		2 h 35 min.		2 h 40 min.		45 min.			
135 km	1 h 55 min.	167 km	1 h 40 min.	284 km	4 h 25 min.	294 km	3 h 35 min.				
1 h 35 min.		1 h 50 min.		2 h 55 min.		3 h					
221 km	2 h 05 min.	350 km	3 h 15 min.	21 km	25 min.						
2 h 20 min.		3 h 50 min.		22 min.							
210 km	2 h 50 min.	339 km	3 h 55 min.								
2 h 15 min.		3 h 40 min.									
153 km	1 h 10 min.										
1 h 45 min.											

1	3
2	

- 1. Distance by car in km
- 2. Average car travel time in hours and minutes
- 3. Rail travel time

motorways and trunk roads, England's cities are all connected by an extensive, high-quality road system. The authorities in England aim to grow the motorway network sustainably and maximise the use of the existing motorway capacity. As a result, while no major new motorways are planned for construction in the immediate future, additional capacity is being provided through technology such as "active traffic management" to match speeds to the capacity of the network, as well as "emergency lane running" to enhance the use of all available motorway space during peak periods.

Transport at Host City level

The candidate Host Cities are accustomed to welcoming fans from far and wide. Efficient and proven transport operation and crowd management plans are in place to provide the level of support needed, and tournament organisers could also draw on their experience of hosting previous large-scale international sporting events. By 2018, England will also have had the experience of hosting the 2012 Summer Olympic and Paralympic Games.

- London and Manchester have a well-developed rail network, including the underground in the case of London, and could rely on an efficient transport infrastructure. Most of the proposed stadiums are linked to the main venues by at least a metro/rail connection as well as the main airport. Liverpool will also belong to this category after the completion of the Mersey rail network to its airport. Anfield Stadium is also reachable within an acceptable walking distance.
- Birmingham, Newcastle-Gateshead and Sunderland (which will be served by the Tyne and Wear "Metro" network as of 2011) and Leeds, which has a planned tram/rail connection to its airport, offer an acceptable level of accessibility. As a result of airport upgrading and a new ground transport infrastructure, the same will also apply to Sheffield (6.5 million passengers planned by

2018, a connection to Manchester airport and a new tram line to its stadium) and Bristol (5.5 million passengers planned by 2018 and a new rail station at the stadium).

- The smaller candidate Host Cities of Plymouth, Milton Keynes and Nottingham have a smaller, relatively limited transport infrastructure. However, Milton Keynes will

Flight connections/journey times

	Nottingham		Bristol		Milton Keynes		Plymouth	
London	55 min.	✗					45 min.	✓
	East Midlands							
Manchester	40 min.	✗	35 min.	✓	1 h 05 min.	✗		
	East Midlands				London Luton			
Liverpool	50 min.	✗			1 h 10 min.	✗		
	East Midlands				London Luton			
Newcastle-Gateshead	1 h 20 min.	✗	1 h 05 min.	✓	1 h 05 min.	✗	1 h 25 min.	✓
	East Midlands				London Luton			
Sunderland (using Newcastle-Gateshead)	1 h 10 min.	✗	55 min.	✓*	1 h 25 min.	✗	1 h 25 min.	✓*
	Newcastle and East Midlands				Newcastle and London Luton			
Birmingham	35 min.	✗			50 min.	✗		
	East Midlands				London Luton			
Sheffield	using same Host City airport		55 min.	✗	1 h 20 min.	✗	1 h 20 min.	✗
			East Midlands		East Midlands and London Luton		East Midlands	
Leeds	45 min.	✗	45 min.	✓	1 h 10 min.	✗		
	East Midlands				London Luton			
Plymouth	1 h 20 min.	✗	25 min.	✓	1 h 20 min.	✗		
	East Midlands				London Luton			
Milton Keynes	1 h 20 min.	✗	55 min.	✗				
	London Luton and East Midlands		London Luton					
Bristol	55 min.	✗						
	East Midlands							

Source: Template 16

* Direct flight, but travel time to airport not included

have a satisfactory rail system upon the completion of the West-East Rail Link, while Plymouth and Nottingham would be able to rely on their bus systems.

Air transport

The Bidder submitted clear information on its airports, including a comprehensive overview of the planned upgrades. Nowadays, England

is a central hub of European aviation and, in London Heathrow Airport, it has one of the world’s busiest airports for international passenger traffic, serving approximately 90 different airlines and 70 million passengers per year to over 180 destinations. England has numerous international airports and all 12 candidate Host Cities are within

Leeds		Sheffield		Birmingham		Sunderland		Newcastle-Gateshead		Liverpool		Manchester	
45 min.	✓	55 min.	✗			1 h 05 min.	✓	1 h 05 min.	✓			40 min.	✓
		East Midlands											
		40 min.	✗										
		East Midlands											
		50 min.	✗										
		East Midlands											
		1 h 10 min.	✗	45 min.	✓	using same Host City airport							
		East Midlands											
20 min.	✗	1 h 10 min.	✗	45 min.	✗								
Only charter jet operation. Drive & Fly		East Midlands and Newcastle		Only charter jet operation. Drive & Fly									
		35 min.	✗										
		East Midlands											
45 min.	✗												
East Midlands													

1	2	1. Journey time
3		2. Direct flights (yes ✓ / no ✗)?
		3. If no direct flights, specify transfer airport(s)

an acceptable travel time from an airport. In addition to the capital, England's international airports handle large passenger numbers. For example, Manchester Airport in the north-west of England handles around 20 million passengers a year, is ranked in the top 25 airports in the world and serves 84 different airlines providing regular direct flights to 46 of FIFA's member associations. It has an acceptable passenger throughput in the ten hours before and after matches and could also easily support nearby Liverpool. Liverpool's John Lennon Airport handles more than five million passengers per year (and provides regular domestic and international flights to Europe and North Africa). Additionally, Leeds-Bradford Airport (three million passengers per year) and Newcastle and Nottingham Airports (both more than five million passengers per year) provide acceptable air connections, allowing passenger throughput of 25,000–30,000 in the ten hours before and after matches.

On top of these existing airports, England also plans to boost throughput at Birmingham Airport (currently nine million passengers per year) in the next few years by constructing a runway extension by 2018. Upgrades are also planned to Sheffield Airport (increasing capacity to 6.5 million passengers per year by 2018) and Bristol Airport (increasing capacity to ten million passengers per year by 2018), as a result of which their capacities would also meet the tournament requirements.

Milton Keynes, although it has no airport, could rely on ground connections to London Luton and London Heathrow Airports, which are both within two hours' travel time, as well as to London Gatwick. Plymouth does not seem to have sufficient passenger throughput (less than 8,000 in the ten hours before and after matches) and would need to be supported during the tournament by Newquay Cornwall Airport (NQY).

Conclusion

Despite not having an extensive high-speed railway network, England has a high level

of international accessibility, with two major international airports in London Heathrow and Manchester. Major upgrades are planned to some medium-sized airports to provide a well-developed air traffic market nationwide, and the country can also rely on an extensive road network which enables acceptable internal transfers, generally over short distances. The candidate Host Cities have a strong infrastructure, are almost all linked to one another, and have experience of traffic and crowd management during football events. Plymouth is the only candidate Host City which could present transport challenges due to its distance from the country's other major cities and insufficient airport infrastructure.

Annexe 1 – National transport network

Annexe 2 – Host City transport networks

4.12 Information technology and communication network

England provides comprehensive information on its current information and communications technology (ICT) infrastructure.

As set out in a report entitled Digital Britain, the government aims to strengthen and modernise the country's communications infrastructure. A USD 1.5 billion government fund launched in January 2010 will ensure the upgrading of the UK digital backbone and provide 90% of all homes and businesses with 50–100 Mbps fibre-optic broadband by 2017. There has also been huge investment to link all the country's major cities, including the England 2018 candidate Host Cities, while a deregulation of the local networks has created a competitive market for broadband services into all the nation's homes and businesses. The government's stated ambition is to ensure universal access to current-generation broadband by 2012, by which year analogue TV services will also be replaced by digital. Analogue radio is to be switched to digital by 2015.

England has complete coverage of fixed telephony. The majority of transatlantic submarine cables land on the west side of the country. There are also multiple submarine cables to Europe. British Telecom (BT) and Virgin Media are the primary fixed telephone network operators. All candidate Host Cities have diverse cable routes through multiple providers with bandwidths in excess of 1 Gbps. In terms of mobile telephony, 98% of the English population is covered by at least one operator, and 91% of the population in a postal district where at least one operator provides 3G area coverage. BT, Virgin Media, TalkTalk/AOL, Tiscali and BSkyB provide services in the fixed line market. The mobile market is highly competitive, with five operators. The market penetration is well above the European average, with over 76 million mobile connections (1.24 connections for every member of the population). The internet market is well distributed among five providers. The London Internet Exchange (LINX) is one of the largest Internet Exchange Points (IXPs) globally. Its membership consists of 340 Internet Service Providers (ISPs) from around the world. At peak times, the exchange carries over 500 Gbps, the equivalent of 1.6 million simultaneous internet video streams, still less than a quarter of its current capacity. In terms of internet usage, fixed broadband is available to 90 per cent of homes and businesses in the UK and the government intends to deliver at least 2 Mbps to every home by 2012. The infrastructure supports multiple interfaces, including 10 Gb/channel high-capacity DWDM bearers, ethernet access services supporting 2 MB to 100 MB, and super-fast broadband services.

England has unrivalled satellite and media connectivity, with Europe's largest supplier, SIS LIVE, having over 100 satellite links and 100 uplink vehicles. Arquiva is a similar provider with 10 international teleports housing over 100 earth stations. As for broadcasting, by 2018, all Host Cities will have a permanent cable infrastructure that

would be linked to the IBC via fibre. There are currently at least 30 large High Definition outside broadcast production units working in England.

England appears to have a well-defined upgrade plan for all services, including measurable milestones and objectives. The advancement of products and services in the area of "triple and quadruple play" by single providers is a plus, as is the fact that a number of upgrade initiatives are in place to enhance the national infrastructure, especially ahead of the 2012 Summer Olympics. The small number of operators in certain markets may limit the scope to negotiate competitive offers from a commercial perspective. However, the inclusion in the Bid Book of a full rate card for the London Olympics provides significant insight into the cost of communications services in the future. Moreover, a significant amount of thought and detail has been provided about the potential management frequencies for the transmission of voice and data services during the event.

England appears to have a strong ICT infrastructure which would meet the requirements of the FIFA World Cup™. The bid provides comprehensive proposals on how England would meet the telecommunications requirements for the FIFA World Cup™. The current support of the football community and the preparations being made ahead of the 2012 Summer Olympics provide a strong foundation that could be used to meet the added requirements for the 2018 FIFA World Cup™.

4.13 Safety and security

The Bidder's safety and security concept suggests that it has a good understanding of the requirements of hosting the FIFA World Cup™.

England has successfully hosted a number of major sporting events in the recent past. Its concept is based both on a best-practice approach and on integrating the lessons learnt from a global international perspective. It can count on a well-prepared, specialised workforce that is geared towards ensuring correct delivery of FIFA's security requirements.

The Bidder's approach to handling major events combines risk prevention and threat management – including anti-terrorism policies – with a dynamic, integrated system of hands-on planning and execution. Effective partnerships between all the key players and stakeholders are emphasised, culminating in a “nationally-planned and locally-flexible framework” under the leadership of the Home Office. All of the roles and responsibilities are detailed to provide a better understanding of the security structure required to ensure smooth delivery of the FIFA World Cup™.

The bid's safety and security proposals take into account all of the criteria and factors required to make the event a success. The explanations and operational plans described already suggest that the country is well prepared for and committed to staging the FIFA World Cup™.

Overall, the Bidder has provided a high-quality concept and the international safety and security standards for major events are likely to be met.

provisions, the specific national provisions for medical services at football events including staffing and infrastructure, and the anti-doping services.

In-depth information is provided on all the points mentioned above and most of the FIFA requirements are already fulfilled by national regulations. Details are provided on hospitals at all venues and training camps, the delivery of emergency services at different levels, specific staffing and infrastructure, all the way down to individual equipment items for the medical services at the competition.

The medical facilities and preventive provisions and procedures with regard to mass emergency medicine comply with high international standards. There are no major health risks with regard to endemic or epidemic diseases and no specific vaccination requirements. The anti-doping facilities are of the highest standard, including a WADA-accredited laboratory in London.

The health-care system, the proposed medical facilities and the precautions and plans with regard to the provision of medical services to teams, delegations and visitors at a mass event meet international standards. From a medical point of view, barring unforeseen epidemics or developments, there is no major risk involved in staging the event in this country.

Overall, FIFA's requirements and international standards for health and medical services are likely to be met.

4.14 **Health and medical services**

The Bidder provides sufficient and good-quality information, including general health recommendations, a description of the health-care system, medical expenses cover, the proposed health-care facilities to be used during the event, the emergency medicine

4.15 **Competition-related events**

The Bidder proposes seven different candidate Host Cities to stage the competition-related events, thus ensuring that the whole of England is involved in the run-up to the FIFA World Cup™. Two options are proposed for each of the competition-related events, as follows:

Event	Venue
FWC Preliminary Draw and team seminar	Manchester Central (capacity: of 10,000) or NEC Birmingham (capacity: of 2,000)
FWC Final Draw	O2 Arena, London (capacity: of 20,000) or ExCel Centre, London (capacity: of 5,000)
FWC team workshop	Wembley Stadium, London (capacity: of 1,500 in the Bobby Moore Suite) or the BT Convention Centre, Liverpool (capacity: of 1,350)
FCC draw and team workshop	Newcastle-Gateshead International Conference and Exhibition Centre (capacity: of 1,650) or Leeds Arena (capacity: of 12,500)
Referees workshop	Wokefield Park, London (capacity: of 400) or the English Institute of Sport, Sheffield (capacity: of 350)
FIFA Congress and FIFA Banquet	ICC London Excel (capacity: of 5,000) or the Southbank Centre, London (capacity: of 2,500)

Adequate information is given on the capacities of all venues and the office solutions and all appear to meet FIFA's requirements. It appears that all locations have high-tech infrastructure. All FIFA offices would in principle be set up in the same location as the competition-related events. The bid also includes some interesting creative ideas for the events.

High-quality hotels have been proposed with an adequate number of hotel rooms for the different constituent groups that would attend the competition-related events. However, the current assignment of constituent groups may have to be revised to ensure that each group has a sufficient number of rooms in each hotel. In conclusion, the information provided indicates that the proposals made by the Bidder would fulfil FIFA's requirements for hosting the competition-related events in a variety of locations, ranging from state-of-the-art conference centres and cultural centres to sports institutes and stadiums.

account the documentation provided during the bid preparation period. The proposed venue seems to meet the requirements for an International Broadcast Centre (IBC). The Bidder also indicates that the City of London has undertaken to assist financially with the establishment of the IBC in the proposed location.

Media facilities and services at venues and stadiums

The quality of the information and clarifications received from the Bidder is sufficient. London would be a suitable location for the International Media Centre, as proposed, because the majority of media are expected to stay in the capital.

Transport within and between the candidate Host Cities would be complimentary for accredited media.

The media space and infrastructure at the venues proposed for the competition-related events appear to meet the requirements. Temporary media structures (for the media tribune, mixed zone and stadium media centre (SMC)) would be required at the existing stadiums and would need to be addressed in the overall space allocation. The presence of a significant number of non-accredited media is also to be expected. Most of the stadium owners are used to staging international football events.

4.16 Media facilities, communications and public relations

IBC

The Bidder demonstrates an awareness of the critical requirements, having taken into

To summarise, there is no major risk in terms of media facilities and services.

Communications and public relations

The Bidder's communications concept is sufficiently detailed.

The English media plays an influential role in football. According to the Bid Book, the 21 national newspapers (11 daily newspapers and ten Sunday newspapers, the majority of which are tabloids) have a combined circulation of 20 million and a readership of 53 million. In addition, there are 1,380 regional newspapers, 8,000 magazines, 417 radio stations and about 600 digital TV channels. London is home to some 200 international media bureaus.

The Bidder foresees a four-tier communications and PR strategy. The main objectives of the communications strategy are to ensure the operational success of the FIFA World Cup™; to maximise the commercial success of the tournament; to enhance the reputation of FIFA and English football and contribute to the development of the FIFA and FA brand; and to create the platform for the biggest possible positive global impact. Top priority would be given to social projects and sustainability.

4.17 Media and marketing rights

TV and media rights

The U.K.'s current listed-event regulations adversely affect the free and unrestricted exploitation of media rights. Such legislation would have to be suspended in accordance with the undertakings given in Government Guarantee No. 6.

FIFA generates a substantial part of its revenues through TV income (via sales of its media rights), which is mainly driven by TV ratings and related values in each part of the world. The TV ratings are affected by what time of the day the match is shown live in each territory of the

world. In the past (and the same will still apply to the 2014 FIFA World Cup™), TV income from the world's markets has not been evenly spread: Europe still generates the largest share. Should the FIFA World Cup™ be hosted in Europe, the TV ratings in Europe and the European media rights income are likely to be higher. It is important to note that FIFA is striving to balance revenues across the world, a goal which is achievable in the long term but unlikely by 2018 .

It should be noted that a correlation exists between TV ratings and other values related to the FIFA World Cup™, such as the exposure value for FIFA World Cup™ marketing rights holders.

Sports marketing and sponsorship market

The quality of the information submitted by England in respect of local sports marketing practices and the domestic sponsorship market was very good. Information was provided on several major sports sponsorship activities in the country, including an indication of some sponsors and related sponsorship rights fees and a list of approximately 50 major corporations investing in sponsorship in England.

England has one of the biggest football fan communities worldwide, a point illustrated by the high average attendances at matches in the top league (estimated at over 35,000). England is easily accessible to countries from which the majority of fans travelling to past FIFA World Cups™ have come. It is considered to be a key market for FIFA's Commercial Affiliates due to its size, the maturity of the economy and its developed sponsorship market.

The Bid Book makes reference to new legislation enacted with regards to the 2012 Summer Olympic Games in London and the 2014 Commonwealth Games in Glasgow which would be tested before the FIFA World Cup™. Government Guarantee No. 6 (Protection and Exploitation of Commercial Rights) has been submitted in full compliance with FIFA's requirements. Based on the reservations

contained in the Government Legal Statement, specific legislation with respect to ambush marketing would be necessary, which the government has undertaken to enact.

Outdoor advertising media inventory

The use of outdoor advertising media inventory by FIFA and/or the LOC in specified areas throughout the candidate Host Cities helps to create a festive atmosphere and forms an important part of FIFA's anti-ambush marketing strategy. The level of information provided by the Bidder in respect of outdoor advertising media inventory reserved in specified areas in each candidate Host City was good. The Bidder has provided a breakdown of the type, precise location and owner/manager of secured outdoor advertising media inventory and in many cases also provided an indication of the extent of the inventory secured. In the Bid Book, the Bidder commits to delivering outdoor advertising media inventory which is secured via option agreements with outdoor advertising companies at no more than 90% of the average market rate (according to the Bid Book, 98% of this inventory is secured around the event sites). The inspection team did not visit a proposed FIFA Fan Fest™ site. Instead, they were presented with plans for FIFA Fan Fests™ throughout the country. In London, the principal proposed FIFA Fan Fest™ site is in Hyde Park. Hyde Park is an iconic site in a central location within the city and is well served by public transport (bus, train and underground). Based on the information presented, it would seem that the area allocated at the site would meet FIFA's space requirements. The Bidder proposes to hold a minimum of two FIFA Fan Fests™ in each candidate Host City.

submitted by the Bidder meet the requirements of the budget template and are derived from a financial model. The budget model provides underlying cost drivers for all major cost captions and is supported by 31 data sheets.

Expenditure budget

The FIFA Confederations Cup and FIFA World Cup™ expenditure budgets (in US dollars and British pounds) are as follows:

Cost figures in thousands	2010 costs excluding inflation		Inflation-adjusted expenditure budgets	
	USD	GBP	USD	GBP
Competition				
FCC 2017	69,290	46,504	86,990	54,369
FWC 2018	653,620	438,671	826,646	516,654
Total	722,910	485,175	913,635	571,022

The expenditure budgets include contingencies of USD 83.1 million or 9.1% of the total combined FIFA World Cup™ and FIFA Confederations Cup expenditure budgets. The Bidder assumes that the full amount of the contingency can be recovered from local suppliers providing budget-relieving value-in-kind services.

The Bid Committee has applied a fixed annual inflation rate of 2.5% in the expenditure budget; this is 0.5% higher than the Bank of England target inflation rate. According to the Bid Book, inflation rates for England ranged between 0.9% and 3.5% in the period from 2000 to 2009 and long-term forecasts range from 1.9% to 2.6% over the period to 2018. A fixed foreign exchange rate of GBP 1 = USD 1.49 has been applied to the budget, excluding inflation. This rate has been adjusted to GBP 1 = USD 1.60 for the inflation-adjusted budget. The Bidder anticipates that foreign exchange rate fluctuations can be covered at this rate. According to the Bid Book, the GBP to USD exchange rate ranged from 1.42 to 1.95 in the period 2000–2009 and is forecasted in the range of 1.55 to 1.74.

4.18 Finance and insurance

The FIFA Confederations Cup 2017 and 2018 FIFA World Cup™ expenditure budgets

Significant budget areas

The Bidder indicates total staff compensation costs including recruitment and social contribution costs of USD 141.3 million or approximately 15.5% of the total combined FIFA World Cup™ and FIFA Confederations Cup expenditure budgets.

The FIFA World Cup™ stadium operation costs would be USD 130.6 million, comprising stadium rental costs. The Bid Committee reports that it has worked extensively with the candidate Host Cities and stadium owners on agreeing cost allocations and responsibilities under the Stadium Agreement. As a result all overlay and certain transport costs would be provided by these parties (funded in part by the stadium rentals) and are therefore not budgeted separately. The Bidder deems the alternative power supplies to the stadiums to be sufficiently robust and stable as not to require a budget provision for temporary power solutions.

The FIFA World Cup™ security budget caption USD 54.9 million relates to the provision of stadium security and other security such as team hotel security. The FIFA World Cup™ specialist support for architects, overlay consultants, IT, etc. would amount to USD 53.2 million.

Insurance

Total FIFA World Cup™ insurance costs are reported at USD 29.8 million, of which USD 13.0 million would be allocated for cancellation/postponement/relocation for a cover of USD 260 million.

Conclusion

The Bidder submitted the budgets in the format required and provided supporting information. The supporting information provides cost analysis and further details on major cost drivers. Based on the total budget information submitted, the Bidder has demonstrated a correlation between the financial parameters of the budget and the intended operational delivery of most areas of the competitions.

4.19 Ticketing

The proposed stadiums meet FIFA's net seating capacity requirement. The indicated seat kills and number of seats with an obstructed view appear to be acceptable, and the VIP and media allocations meet the requirements. The Bid Book provides clear stadium drawings and detailed information about hospitality.

It is reasonable to expect full stadiums (corresponding to 100% of the net seating capacity) in England, which would result in approximately 3,397,000 sellable tickets.

The bid meets the requirement for indoor hospitality in sky boxes and business seats (5% to 8%), and offers total indoor and outdoor hospitality capacity of 700,000. The fact that 12 of the 17 stadiums already exist assures seating capacity and facilitates early ticketing operations.

The bid provides high-quality proposals in terms of infrastructure and the existing market conditions. FIFA's ticketing and hospitality requirements are likely to be met.

4.20 Legal and Government Guarantees

The Bidder has submitted fully executed versions of all required contractual and government Hosting Documents to FIFA. An overview of the Bidder's compliance with the content of the FIFA template documents and the risks resulting for FIFA is set out in annexe 3.

The Hosting Agreement has been submitted in duly executed form without any deviation from the FIFA template. Unilaterally executed Host City Agreements have been provided by all 12 candidate Host Cities. All such Host City Agreements fully comply with the template Host City Agreement without any deviation.

The evaluation of the contractual documents for stadiums and training sites is contained in the relevant sections above.

The Bidder has provided all Government Guarantees in full compliance with FIFA's template documents. In its Government Legal Statement, the U.K. Government expressly applies reservations and qualifications to the Government Guarantee Nos. 1, 2, 3 and 4 which reduce the effect and enforceability of important aspects required by FIFA in such Government Guarantees. Although an undertaking is given for the enactment of necessary legislative changes within the required deadline, important aspects required by FIFA are reduced, in particular:

- Certain chapters of the Bid Book shall prevail over the relevant Government Guarantees and the government makes the implementation of the relevant Government Guarantees subject to “future exchanges between the Government, The FA and FIFA” to ensure an application “in an operationally feasible way”.
- The exemptions granted are, by virtue of the Government Legal Statement, subject to reservations relating to U.K. obligations under European Union (EU) and international laws. The tax exemption of FIFA has been granted only until the end of the term of the Hosting Agreement and in relation to the events.
- The existing listed-event regulation in the U.K. which adversely affects the free and unrestricted exploitation of media rights, needs to be suspended in accordance with the undertakings given in Government Guarantee No. 6.

The Legal Opinion does not provide a solid basis of reference as it materially deviates from the FIFA templates and remains subject to many assumptions and qualifications.

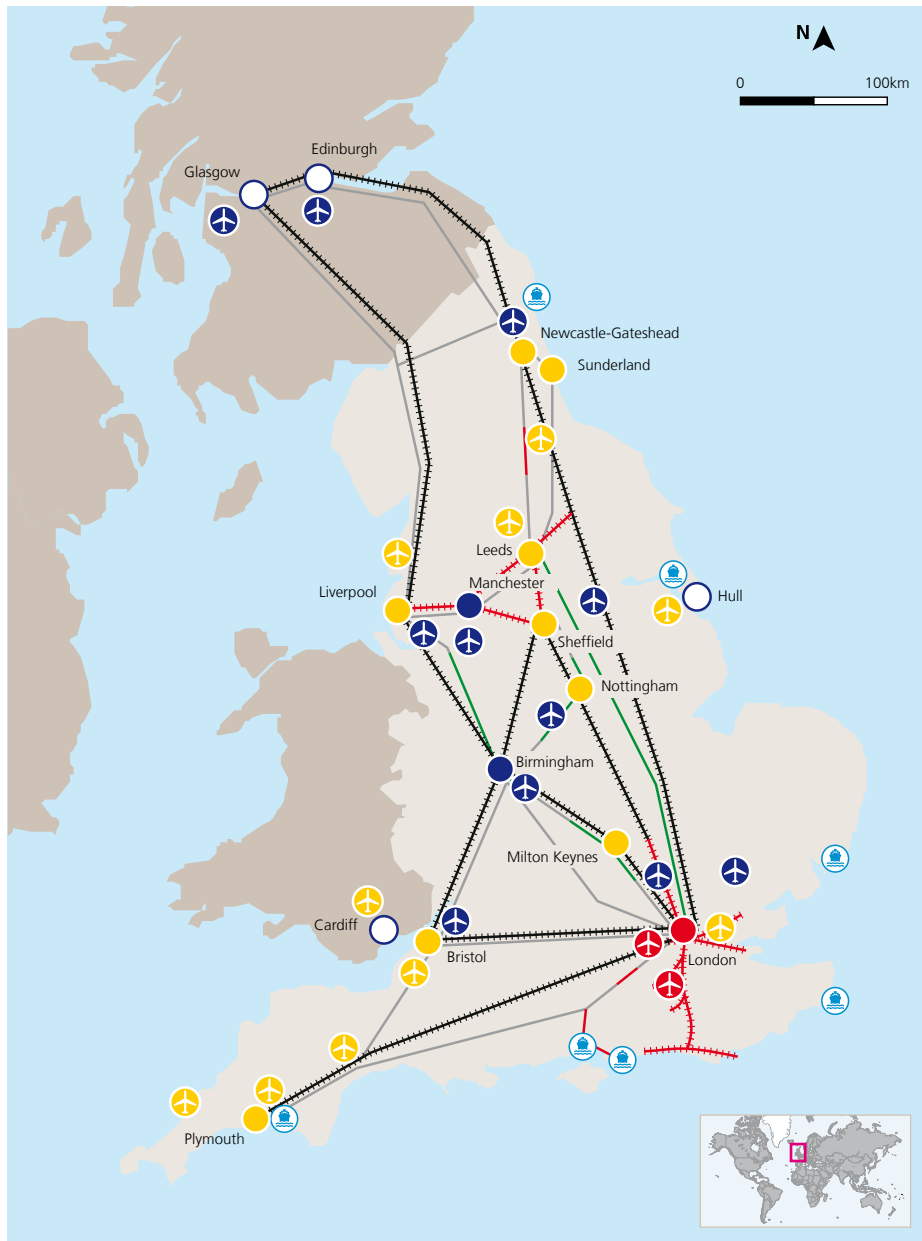
Nevertheless, by being awarded the right to the 2012 Summer Olympic Games, the U.K.












Government has been given the opportunity to gain experience in supporting the hosting and staging of a major sports event and to show its willingness to make material concessions and accommodate the concerns of event organisers.

Conclusion

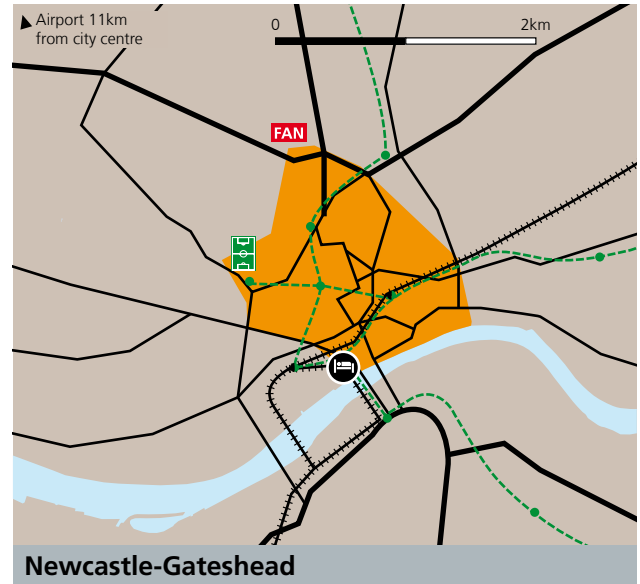
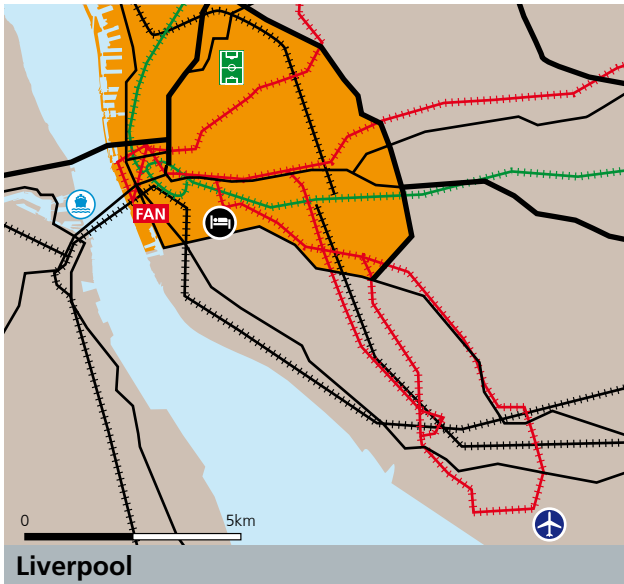
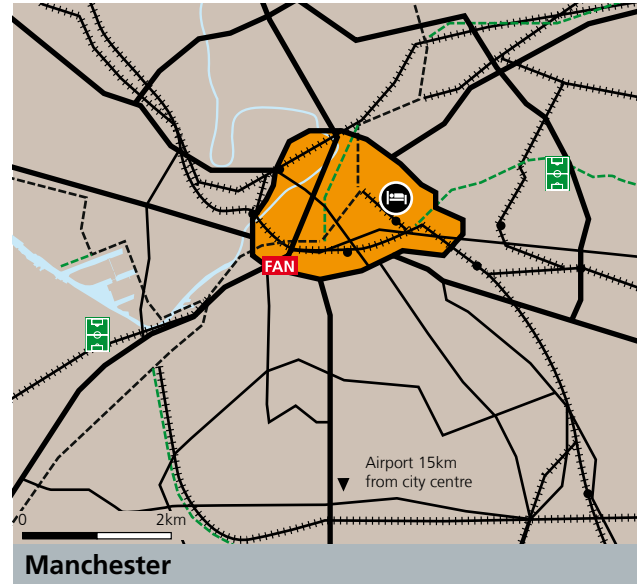
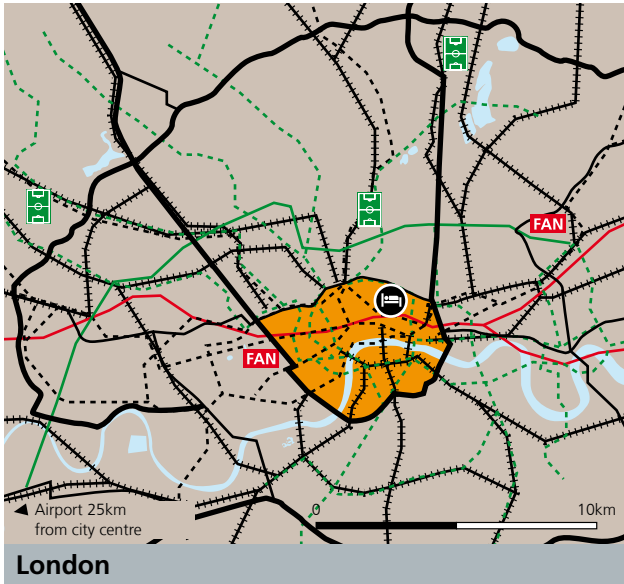
If England is awarded the hosting rights, FIFA's legal risk appears to be low. Whilst the requirements for contractual documents have been met, the necessary government support is subject to certain reservations and qualifications to four Government Guarantees as contained in the Government Legal Statement, the U.K. Government has been given the opportunity to gain experience in supporting the hosting and staging of major sports events and to show its willingness to make material concessions and accommodate the concerns of event organisers.

Annexe 1 National transport network

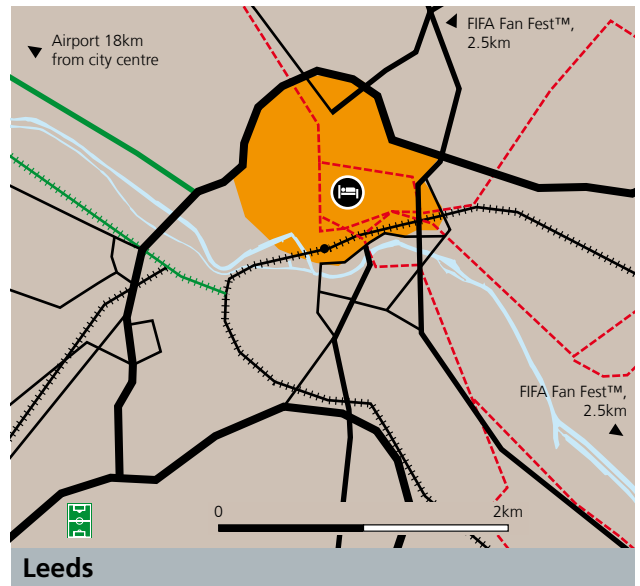
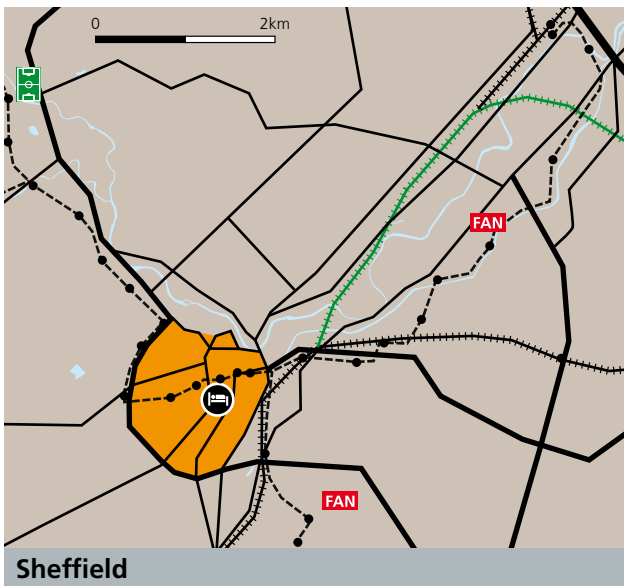
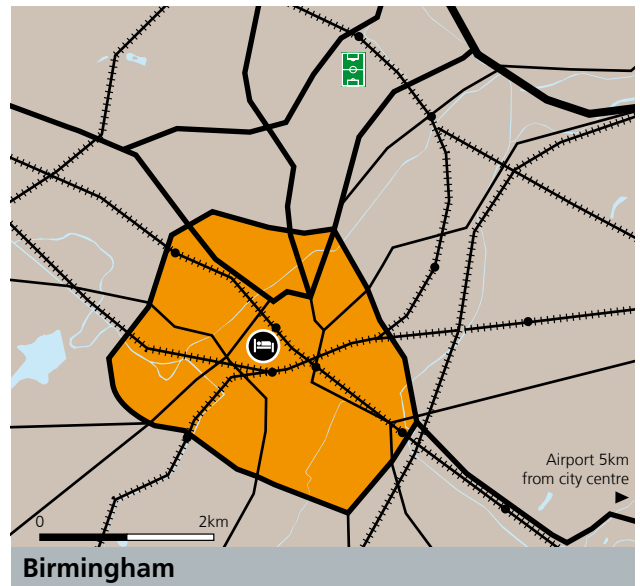
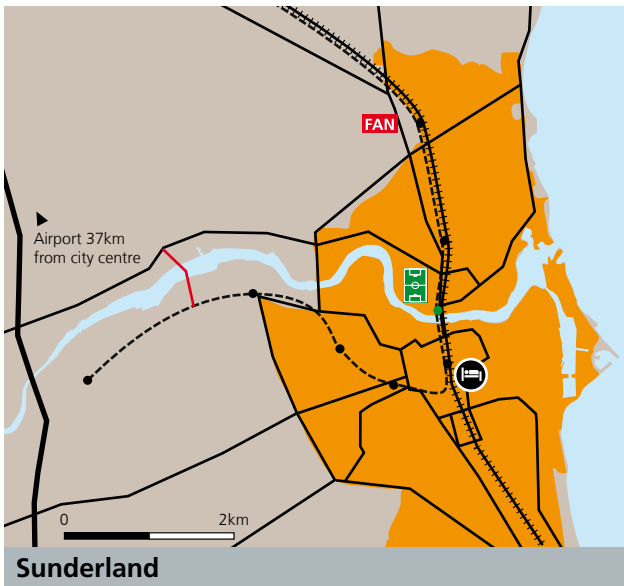























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|--|--|---|------------------|
|  Stadium |  Hotel | Inhabitants | Rail |
|  Airport < 5m |  FIFA Fan Fest™ | Host City | Existing |
|  Airport 5 to 25m |  City centre |  < 1m | Major renovation |
|  Airport > 25m |  Seaport |  1 to 5m | Metro/tram/bus |
| | |  > 5m | Motorway |
| | | | Planned |

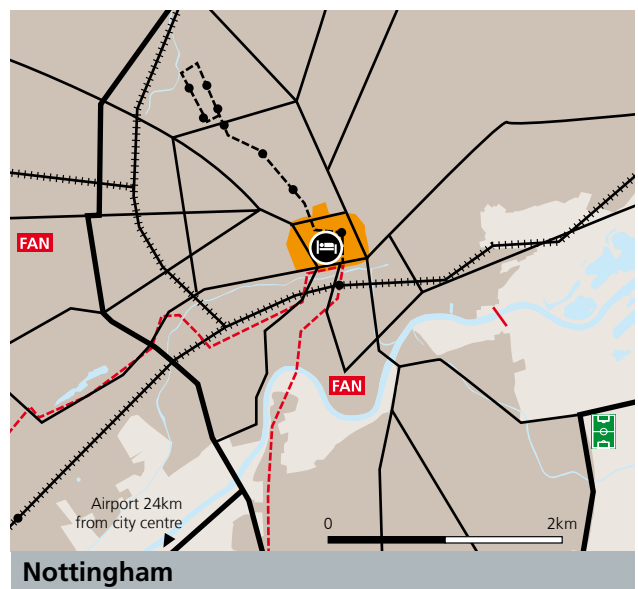
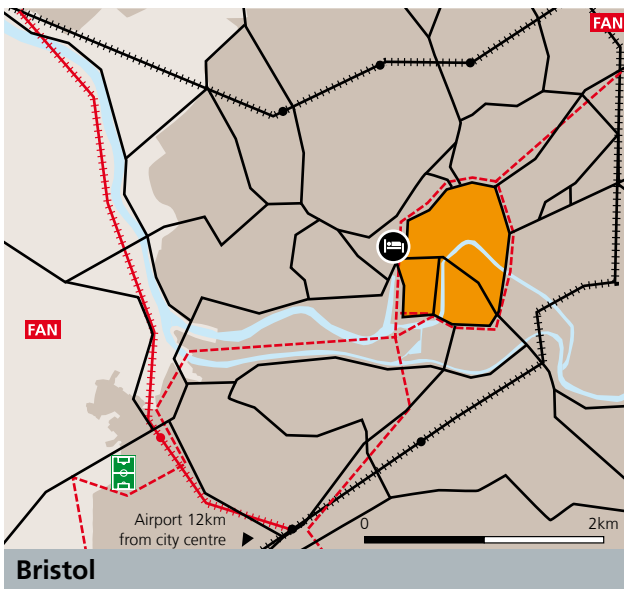
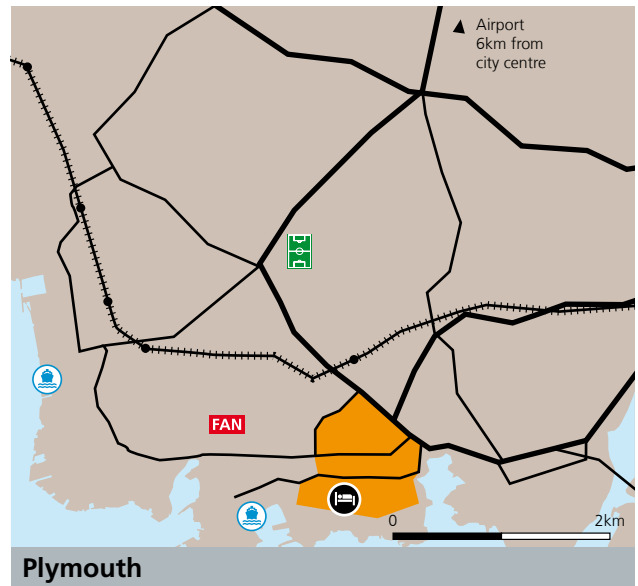
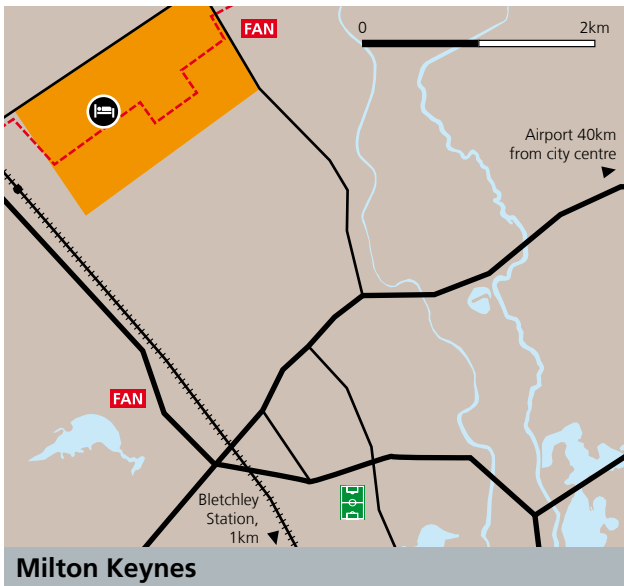
Annexe 2 Host City transport networks



- | | | | |
|------------------|----------------|--------------------|-----------------------|
| Stadium | Hotel | Inhabitants | Rail |
| Airport < 5m | FIFA Fan Fest™ | Host City | Existing |
| Airport 5 to 25m | City centre | < 1m | Major renovation |
| Airport > 25m | Seaport | 1 to 5m | Planned |
| | | > 5m | Metro/tram/bus |
| | | | Existing |
| | | | Major renovation |
| | | | Planned |
| | | | Motorway |
| | | | Existing |
| | | | Major renovation |
| | | | Planned |



- | | | | | | | |
|--|--|--|---|--|--|---|
|  Stadium |  Hotel | Inhabitants | | Rail | | |
|  Airport < 5m |  FIFA Fan Fest™ | Host City | Non-Host City |  Existing |  Major renovation |  Planned |
|  Airport 5 to 25m |  City centre |  < 1m |  1 to 5m | Metro/tram/bus | | |
|  Airport > 25m |  Seaport |  > 5m |  |  Existing |  Major renovation |  Planned |
| | | | | Motorway | | |
| | | | |  Existing |  Major renovation |  Planned |



- | | | | |
|------------------|----------------|--------------------|-----------------------|
| Stadium | Hotel | Inhabitants | Rail |
| Airport < 5m | FIFA Fan Fest™ | Host City | Existing |
| Airport 5 to 25m | City centre | < 1m | Major renovation |
| Airport > 25m | Seaport | 1 to 5m | Planned |
| | | > 5m | Metro/tram/bus |
| | | | Existing |
| | | | Major renovation |
| | | | Planned |
| | | | Motorway |
| | | | Existing |
| | | | Major renovation |
| | | | Planned |

Annexe 3

Overview of legal evaluation

Legal documents	Risk for FIFA	Remarks
Government documents		
Government Guarantees	Low risk	The government support has been secured subject to certain reservations and qualifications to four Government Guarantees as contained in the Government Legal Statement, but the U.K. Government has been given the opportunity to gain experience and to prove its willingness to make material concessions.
Contractual documents		
Hosting Agreement	Low risk	Submitted document fully executed in compliance with FIFA requirements.
Host City Agreements	Low risk	Submitted documents fully executed in compliance with FIFA requirements.
Stadium Agreements	Low risk	Submitted documents fully executed in compliance with FIFA requirements.
Training Site Agreements	Low risk	Submitted documents fully executed in compliance with FIFA requirements.
Confirmation Agreements	Low risk	Submitted documents fully executed in compliance with FIFA requirements.
Overall		
Overall legal risk	Low risk	

Annexe 4

Operational risk

		Remarks
Competition		
Stadium construction	Low risk	Initial budget may need to be reviewed; upgrades of existing stadiums could cause challenges due to space restrictions in and around some stadiums.
Stadium operations	Medium risk	Specific attention would have to be given to the fulfilment of future FIFA World Cup™ space and quality requirements.
Team facilities	Low risk	The legal risk is low.
Competition-related events	Low risk	
Transport		
Airports and international connections	Low risk	Sufficient existing and planned (guaranteed) facilities. In some cases, support from other airports could be necessary.
Ground transport	Low risk	No high-speed rail in plan, but due to short distances between candidate Host Cities, roads and rail networks are sufficient to cope with requirements.
Host City transport	Low risk	Almost all candidate Host Cities would be able to cope with the tournament requirements.
Accommodation		
General accommodation	Medium risk	10,700 rooms have been contracted using an approved template FIFA Hotel Agreement. Contracts for an additional 50,300 rooms materially deviate from the template FIFA Hotel Agreement so rates and conditions are unclear. Pairing of candidate Host Cities is possible and flexible, although there may still be slight shortfalls in three (remote) cities. The contracted supporter accommodation is limited, but potential capacity exists.
TV		
International Broadcast Centre (IBC)	Low risk	

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