The importance of the creative industries

Thames Gateway and creative industries

The importance of the creative industries has been acknowledged by Government, by the Mayor of London and by private and public sector leaders in East and South East London. It is an essential and highly prized component of a knowledge driven, value adding, diverse and inclusive economy. London Development Agency and Thames Gateway London Partnership have identified this sector as one of the principal opportunities for London as a whole and Thames Gateway in particular.

This is consistent with other successful European, international metropolitan and regional development practice. TGLP might look to New York, San Francisco, Paris, Marseille/Nimes, Hamburg, Milan and Cambridge to see the high levels of importance placed on creative industries in the creation of profile and reputation, and also on inward investment and economic success.

Many TGLP member and partner bodies - local authorities, Universities and others - recognise the importance of creative and cultural activity to the whole regeneration enterprise, and have reflected this in corporate strategies and programmes. Lewisham and Newham, amongst other local authorities, have identified the added value which creative industries bring to all sections of their communities.

Thames Gateway London Partnership has the opportunity to play a leading role in promoting support for this sector. The business, cultural and residential communities of East and South East London have much to gain from this support.

Adding creative, cultural and commercial value to the Thames Gateway

In the emerging new economy, innovation and experimentation, creativity and imagination are valued more highly than ever before. The characteristics that define the creative industries in Thames Gateway London – diversity, innovation, inclusion and individual exploration – also define success in the new economy. Its creative communities have long been committed to innovation, and provide some exemplars of socially and culturally inclusive practice.

Thames Gateway London has a long history of providing creative and technical services for the rest of the capital. This important sub-region of the capital has been dominated by creation and production - making and doing - rather than by the higher value processes of distribution, exhibition/sale and consumption. The recycling of derelict manufacturing spaces by designers, media companies and artists’ studios represents the changing nature of the economic and employment base of Thames Gateway London just as much as the exponential growth of Canary Wharf and its financial services sector.

Regeneration and development in the inner Thames Gateway area could be propelled by an approach which connects Central London and the City to mainland Europe. West London has attracted multinational companies to enjoy proximity to Heathrow and Central London. Thames Gateway could inhabit a similar position, an opportunity made possible by the International Passenger Station at Stratford and its transport links including Crossrail, and by easy access to London City Airport and Stansted. If achieved, this would make the East a major creative centre and a centre of growth.
**Strategic Issues**

The issues which TGLP needs to address relate to the following areas:

- **Foresight** - understanding the need for investment in technology and infrastructure and of the long term market and other structural changes and the public sector support needed in order to develop the sector.

- **Influence and investment** - recognition of the importance of brokerage and the role of the largest scale projects; and of the importance of networks, support structures and intermediaries.

- **Equity** - ensuring that the potential and diversity of all parts of the community is recognised and nurtured by establishing links between training needs and future employment opportunities in the sector.

**Opportunities and challenges**

The structure and nature of creative industries offers both opportunities and challenges for the sector:

**Industry structure**

- small scale fragmented, reliant on freelance employment
- few major creative industry players in TGL
- market drivers in the medium term are outside the influence of the sub-region and local public sector influence
- rise in the number of industry-focused and specialist business support agencies
- number of well-developed geographical based clusters, including City Fringe, Tower Hamlets/Hackney, Lewisham/Deptford/West Greenwich, Stratford

**Skills and practitioners**

- large numbers of practitioners live and work in the inner Thames Gateway, compared with areas further east. 9% of employment(72,000 people) in Thames Gateway London work in the sector, as well as very substantial numbers who are self-employed.
- the creative and cultural diversity of parts of the TGL area is an important ingredient in the development of the sector in which the cultural content of products and services is a significant factor
- industry-determined skills, investment and support structures are not yet fully in place

**Planning, development and infrastructure**

- the scale of development opportunities and the importance of major infrastructure projects sets an important agenda for the development of the creative industries in the sub-region
- there is a significant overlap between the proposed zones of change in Thames Gateway and where the creative economy is established or developing
- Thames Gateway has a large number of unattractive business, social and physical environments - whilst artists and others will often take part in pioneering phases of regeneration, the sector as a whole demands the same high standards for access, communications and environment as other sectors
- Digital infrastructure is as important as roads, railways and bridges
**Strategic Factors**

The following factors are determining the policy context in which TGLP and its partners are operating, and the economic context in which private and public partners will need to determine priorities and take action.

**Consolidation and expansion of the City Fringe**

Work and jobs are substantially located at the western end of the sub-region: 63% of these jobs are in the City, Tower Hamlets and Hackney. There is evidence of significant activity particularly in the media, design, designer-maker, and visual arts sectors in these long-established locations. To the south and east, Greenwich, Lewisham and Newham have experienced recent growth in levels of activity, and have seen significant investment in new cultural infrastructure. New and improved venues, exhibition spaces and studios in the Royal Docks, Stratford Town Centre, Deptford Creek (with the proposed Creative Business Enterprise Zone), Greenwich Peninsula and Woolwich are examples.

The City Fringe needs to be sustained as an important economic generator closely connected with the success of the financial, legal and professional sectors in the City. The location of substantial parts of these sectors in current and future phases of Canary Wharf offers the opportunity for a similar growth in the creative support services, currently based to the North and East of the Square Mile.

**Getting bigger companies to move east**

Unlike Central London and the M3-M4 corridor, East London has very few major industry players. Commissions from the biggest companies - in television, publishing and advertising, film and interactive media - create the marketplace for the small companies and independents. In Thames Gateway, the structure of the creative and cultural industry economy mirrors the London wide and national pattern, with a very large number of small businesses and freelancers and a small number of big companies.

Other than a small number of multinational media publishers and advertising companies in Wapping and Canary Wharf, and exhibition/event industries in the Royal Docks (and, potentially, North Greenwich), larger companies have not moved east. The market makers are still in Central and West London.

**The whole inner Thames Gateway as a creative industry location**

The relative cheapness of property in the East and South East London will not persist. The lack of physical and digital access, which has in part caused these market conditions, is being tackled. Creative industries are demanding better quality working environments. The biggest cluster of companies has been in Hackney and Tower Hamlets. Businesses are now moving East to Newham, Lewisham, Greenwich and Waltham Forest.

The challenge is to create permanent locations for small, creative businesses along the line of development linking Deptford-Greenwich-Royal Docks-Stratford-Walthamstow. This will impact on the development agenda for areas further east - such as Barking and Ilford - which are looking at the cultural and creativity component in town centre improvements and growth. Potential new creative development zones will need to establish communication (for people, goods and digital media), critical mass (with enough companies working collaboratively and competitively) and critical acclaim (with
the locations being accepted by entrepreneurs and the wider creative community as media/arts business business-friendly.) Environment, access and communications are critical - access to broadband at a local level is essential for companies whose product is digital and whose markets are 24 hour and global.

Strategically, this recognises that an evolving pattern of growth and change can be settled into a planned pattern of location – and sustained - if environmental and price conditions are right. It would allow the whole inner Thames Gateway area to become a creative industry location.

The scale of investment: the importance of public funding
Public investment - by Government, the LDA, local authorities and regeneration agencies - will be an essential part of this large-scale long-term process. The kind of strategic partnerships, which successfully delivered Excel and the International Passenger Station at Stratford, need to be deployed to get major creative players to move east, and to benefit indigenous businesses and communities. There are major sites where this is achievable, including Convoys Wharf, North Greenwich Peninsula, and the Newham Arc of Opportunity from the Royal Docks to Stratford.

Community-based creative and cultural organisations
In the absence of indigenous commercial creative businesses of national and international significance, the role of the publicly funded cultural sector is vitally important in the evolving sub-regional creative economy. Publicly funded cultural organisations need continuing investment and support so that they can nurture and develop local talent, deliver a significant part of the access and inclusion agenda, and in connect local culture and communities to the new opportunities and markets.

Innovation and inclusion
The Thames Gateway area has long been a place for cultural inclusivity and experimentation, exemplified by

- the groundbreaking work in theatre and contemporary dance developed at the Theatre Royal Stratford East, the Laban Centre and Chisenhale, and the Greenwich and East London dance agencies
- the tradition of excellence in developing contemporary visual arts and design practice, through Goldsmiths and the East London based colleges, leading to the growth in Tower Hamlets and Hackney of the largest concentration of artists and designers in Europe
- the development of 21st century models of creativity influenced regeneration in places like Hoxton, Bermondsey, Stratford and Deptford, where innovation in a wide range of digital media meets traditional designer maker practice.

The successful development of black, Asian and other culturally diverse creative businesses is, in addition, constrained by difficulty in accessing investment, and by the lack of physical infrastructure investment. Project like the Rich Mix Centre and the Stephen Lawrence centre will provide leadership and profile for all of the communities in East and South East London.

The role of Higher Education, through the universities based in Thames Gateway, is central to the development of skills, attitudes and capabilities to deal with the research, technological and foresight needs of the creative sector in the future.
Leadership, infrastructure and support

An Action Framework for the Thames Gateway London Partnership

The report sets out an action framework structured around 4 themes with 18 targets indicating the range and type of action which the TGLP needs to implement in the next few years in order to influence the policy and physical environment in which the creative sector can contribute to the economy of the sub-region. These themes are:

- Infrastructure
- Supporting Creative Businesses
- Networks and People
- Foresight, Innovation and Knowledge

The implementation of this action framework requires the setting up of dedicated structures and the securing of core investment to fund it. The report sets out a detailed first phase Action Plan (2001-03) which has the core objective of putting the structures and expertise in place to enable the long term development and implementation of the Creative Industries Strategy.

Taking the Strategy Forward

The report recognises the role of TGLP and the Creative Industries Task Group in the development of the sector to date. It recommends that it is now time for the Task Group to conclude its work and for TGLP to establish development of a broadly based creative industries advisory forum with a wide range of public, private and other organisation representatives. This will enable TGLP and its partners to support:

- effective creative industry leadership and representation at the highest levels.
- improved public sector coordination of support for the creative industries.
- industry specific focus for skills, investment and support

To implement this strategy TGLP and its partners will agree to:

- identify the leadership and management to implement the programme
- prioritise the funds and identify funding partners to make this possible.

East London Creative Industry Development Agency

In order to support the economic development of the creative industries in Thames Gateway, the strategy proposes that TGLP sponsors an independent agency with the following aims:

- Promote the case for investment, supporting existing and new creative business locations and infrastructure
- Strengthen the performance of established and emerging industry clusters and networks
- Develop stronger links between locally based creative businesses and with London wide and international market opportunities.
- Focus training, employment and business support to the particular needs of the creative sector
- Ensuring that creative businesses in Thames Gateway have continuous access to information about technology developments and market intelligence

This will work closely with creative industry partners and Invest in Thames Gateway London. It will complement the work of existing borough-focussed initiatives.
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Introduction: challenges and opportunities

Thames Gateway: a regional national and European priority

Thames Gateway is a priority for Government, for the South and East England, and for London as a whole. It is the biggest regeneration project in Britain - with its location and the scale of its aspirations - and it represents a substantial proportion of London's development opportunities. In this context, Thames Gateway London Partnership (TGLP) has identified the creative industries as an essential component of the economy and as a sector which needs to be nurtured and supported. TGLP has recognised the role of the creative industries in creating a working, cultural and design environment for Thames Gateway, in its centrality to the knowledge economy and in its importance in unlocking and reflecting the talents of East London's diverse and creative communities and its Economic Strategy identifies growth in this sector as one of the principle opportunities for growth in the Thames Gateway London (TGL) economy.

This is consistent with other successful European, international metropolitan and regional development practice. TGLP might look to New York, San Francisco, Paris, Marseille/Nimes, Hamburg, Milan and Cambridge to see the high levels of importance placed on creative industries in the creation of profile and reputation, and also on inward investment and economic success. These city-regions have committed themselves to economies increasingly based on:
- high value industries, in which multinationals and small businesses generate products and services based on knowledge, creativity and intellectual property
- the exploitation of digital media and the skills of artists, makers and content creators
- engagement in the global market place
- marketing and branding based on new rather than old industrial practices

At Stratford, for example, the "cultural quarter", the film and music businesses at Three Mills, design and display companies at Mill Meads sit at the edge of the railway development lands. These form a larger development zone than the Isle of Dogs, and are at the centre of the wider Lea to Royal Docks arc of opportunity. The opportunity to build on existing creative and cultural activity, with a series of knowledge and creativity economy based developments as a core feature of this major new international/European interchange site, represents one of the most exciting prospects for the creative sector in the whole TGL region. Stratford and London City Airport will have an increasingly important part in East London's European address. Similar opportunities exist in the North Greenwich/Woolwich axis.

The Economic, Spatial and Transport strategies being developed by the Mayor of London set out the importance of the sub region and, providing that the research, planning and marketing are in place, to London's future economic success. The main drivers are development land and sites to the East; the growth potential which is expected to manifest itself in the next ten years in the extended arc of opportunity from Stratford, through the Royal Docks and Greenwich to Woolwich; and a commitment to cultural equity and celebrating London's diversity.

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1 Going East; the economic strategy of the Thames gateway London Partnership, TGLP 2000. Throughout this study the Thames Gateway London area is referred to as TGL
Thames Gateway London is rich in its cultural and creative diversity and its people are its greatest asset. Releasing the skills and talent of all of TGL’s communities to contribute to and gain from growing prosperity is central to TGLP’s economic strategy and is the major challenge for policy makers. TGL contains some of the most deprived wards in the UK and many of its Black and ethnic minority communities experience significant levels of social exclusion. The creative and cultural industries are one of the fastest growing sectors of the UK economy but creating routes into employment in the sector for people from excluded communities and encouraging the growth of black and ethnic minority creative businesses will require significant investment in training and skills development.

London East Learning and Skills Council’s (LELSC) recent review of training and skills development in the creative sector in TGL is a parallel and complimentary report to this study. Its recommendations provide a framework for addressing the skills deficit and providing pathways of opportunity for people without formal or traditional skills and qualifications into this sector. TGLP and LELSC together with Business Link for London, Further and Higher Education Institutions (F&HEIs) and creative and cultural industry training, development and support organisations will need to work together to deliver the skills and support required to ensure that the success of the creative industries reaches out to and includes local people.

The challenge for TGLP in this context is to support creative industries development to the point where they can play an assertive and successful role in the development of the new Thames Gateway economy. This study sets out some of the issues which will need to be tackled to enable the whole Thames Gateway project to take best advantage of the significant numbers of creative individuals and small businesses which at the moment form almost all of the industry in the Thames Gateway area. It looks at ways of integrating creative industry development within the "Thames Gateway London Zones of Change", and utilising the creative economy as a catalyst to change, improvement and inclusion. It proposes an East London creative industries development agency to act as advocate and champion for Thames Gateway and its support for the creative sector.

A strategy for the creative industries in East London must recognise the strengths and opportunities which lie in Central and West London, and seek to develop market and other opportunities on a London wide basis. In many of the industries which we are looking at, the market is in any event global, and the pivot points are London's airports, the rail and road gateways to Europe, digital infrastructure and the specialised skills and world reputation founded elsewhere in the capital.

**Opportunities and challenges**

**Industry structures,**

*Most of Thames Gateway's creative industry operates at the smaller end of the SME spectrum.* Most creative enterprise is based in small scale, individualised, studio/atelier practice. This brings the opportunities and difficulties associated with small companies; enterprise, energy spin-offs and start-ups; and a reliance on a freelance economy. It underscores the opportunities for dynamic linkages between businesses and the Universities; and the need for intelligent, responsive and evolving support and investment structures which are committed to meeting the opportunities and challenges thrown up by small and fast moving creative businesses.
There are very few major creative industry players located in TGL. There are a number of multinational and/or market leading businesses and clusters of national and international significance. These included publishing (particularly news and newspapers) in Wapping and the Isle of Dogs and commercial printing, which is also a significant employer in Lewisham and Greenwich.

However, compared to Central London and West London, Thames Gateway neither has significant national agencies (broadcasters, national cultural institutions other than the Barbican) nor does it have creative industry clusters and centres where the nature of the industries themselves - for example film, television, non-news publishing, or games software development - have a significant multinational dimension.

Market opportunities and development will continue, in the medium term, to be determined by factors that lie outside sub regional and local public sector influence. Until and unless there are TGL based companies which are producing not just services and content, but which are also playing a structured role in dissemination and in the commissioning and ownership of intellectual property, creative businesses in TGL and beyond will continue to be highly responsive to the needs and demands of a global market place. All of the main market drivers will be beyond the sub-region, and absolutely beyond the boundaries of particular boroughs or regeneration schemes.

There needs to be a single, consistent strategy for London as a whole, feeding key conclusions into individual and corporate practice, and disseminating research and forecasting information. This will assist those parts of the industry that are reliant on digital media for the generation of their product, as well as its market development and dissemination. Every effort should be made to attract the next generation of media industry players to developments such as Stratford, adding to the moves east made in the 1980s and 1990s by the newspaper and information sectors at Wapping and Canary Wharf.

The role of specialist intermediary and business support organisations which have grown up around major clusters provide a sector led core of specialised support to Creative Industry businesses. In the City Fringe area, where creative clusters are very dense they are supported by a range of specialist support and intermediary agencies. These include Mazorca, the Lux Centre, Video Electronic Training, Metro New Media, Bibliotech, Space studios, Circus Space, the London College of Fashion and Fashion Works and the LFVDA to name but a few. All of these are specialists that work closely with and understand the context of creative industry micro businesses, SMEs and freelancers, they offer easy access and highly specialised sector specific services. As the creative industries establish themselves further east in TGL and in greater numbers it will be important to establish more specialist agencies to support them.

The role of Higher Education, through the Universities based within the Thames Gateway, is central to the development of skills, attitudes and capabilities to deal with the research, technological and foresight needs of the creative sector in the C21st. The universities are already demonstrating ways in which they can develop structures which are industry-focussed and allow for skills development and transfer; continuing professional, skills and technical development; and which can act as focal points for research and foresight. Knowledge Dock at UEL is one such project. They act as intermediaries and development partners - Goldsmiths' role in the Creative Business Enterprise Zone in Deptford is a case in point. The role of HEIs in the sustaining of strong knowledge based economies is well acknowledged world wide, and sets a challenge for Thames Gateway.
Thames Gateway has a number of well developed geographical based clusters, which are largely based on design, new media, visual and related activities. Existing areas include
- City Fringe: design, photography, financial and legal sector publishing.
- Wapping/Isle of Dogs: news and information publishers and printers.
- Hackney: designer makers; fashion; furniture; visual artists studios and galleries, music.
- Tower Hamlets: designer makers; fashion; furniture; visual artists studios and galleries.
- Deptford/West Greenwich: designer makers; visual artists studios and galleries.
- Lewisham/Deptford: contemporary dance.
- Stratford/Three Mills: film and television services; exhibition services.

“Going East”\(^2\) indicates major opportunities for the sector in Hackney and the City Fringe and in Lewisham/Deptford and Creekside/Greenwich and significant opportunities at Stratford-Leaside-Arc of opportunity, The Royal Docks and Walthamstow and Upper Lea Valley.

The challenge for Thames Gateway London Partnership is to sustain these; and to develop new districts, within the Zones for Change. Different approaches are required in the inner areas (City of London, Hackney, Tower Hamlets, parts of Greenwich and Newham); in the development zones of Newham, Greenwich and Barking; in the other largely residential or traditional industrial areas of Bexley, Waltham Forest, Havering and Redbridge), Dartford, and Thurrock.

Skills and practitioners

Relatively large numbers of practitioners live and work in inner Thames Gateway, (Lewisham, Greenwich, Tower Hamlets, Hackney) compared with areas further east.

Evidence from four industry sub-sectors – Film and Broadcasting, Dance, Visual Arts and Design - clearly indicates businesses and individuals trading in these sectors in strong clusters of activity in Lewisham, Greenwich and Newham. There is a heavy concentration of employment in these sectors in the City of London, Hackney and Tower Hamlets which between them account for 63.5% of total creative sector employment within Thames Gateway London Partnership.

The creative and cultural diversity resident in Thames Gateway, and in particular in the inner East London boroughs, is an important ingredient in the development of an economy which is engaged in a global market place, where the cultural content of tangible and physical products, services and projects is a significant factor. There are a numbers of examples where young East Londoners with few formal qualifications have established world-wide reputations and businesses in music, media, fashion, design and media. Developments such as the Rich Mix Centre and the Stephen Lawrence Centre are significant new contributions to the cultural infrastructure of TGL however, by and large, the creative sector fails to reflect the rich cultural diversity of TGL and to exploit this in markets. Black and Asian creative entrepreneurs find it harder to access investment and business support and are not reflected in due proportions in the wider industry sector leadership.

Working with the London East Learning and Skills Council (LELSC), Business Links for London and the planned Knowledge Centre for Black and Ethnic Minority Business and the wide range of training and opportunity based development projects, one of TGLP’s

\(^2\) Going East; the economic strategy for Thames Gateway London Partnership, op cit
contributions to the wider London creative city project should be to ensure that the creative industries take best advantage of the diversity, talent and energy of young East Londoners.

Skills, investment and support structures are not yet in place. Learning, skills development, training and enterprise support structures are currently rebuilding their offer to businesses and to people looking for work and career progression. The challenge in TGL is to get this right for small businesses and freelancers and to understand the relationship between small and large businesses. LELSC’s recently completed review of LETEC’s support to the sector and of its training needs is to be welcomed and its recommendations will provide an important step in the development and delivery of training and skills development that reflect the structure and needs of the sector.

There are significant shortfalls in local skills and educational attainment. There are few well developed structures offering support for continuing and professional development; a lack of industry recognised training and difficulty of reconciling this need with major funders (for example over accreditation requirements); and a lack of resources or use of resources to nurture and promote local talent beyond full time education to professional standards.

Not for profit and/or community based cultural and arts organisations play an important role in providing access, in identifying and nurturing talent. They connect local cultural and community structures to the wider opportunities in what is a relatively new economic sector, and to the life of the “new city”. It is important to place value on such work throughout the TGL boroughs. In the absence of a well-developed commercial industry structure, the not-for-profit sector is important. It gives creativity and culture in the sub-region some of its distinctive characteristics. Examples include the role of visual arts studios; festivals and community arts organisations; music training projects; and funded theatre and dance companies.

This part of the sector have particular funding and organisational requirements, reflecting the way in which they sell services and develop product through grant aid, project funds and service level agreements with local authorities and other funders. These are an important part of the creative industry spectrum and are not second-class activities.

Planning, development and infrastructure

The scale of development opportunity in East London, and the importance of major infrastructural interventions set an important agenda for the development of the creative industries in the sub region. The role of the largest projects (Excel, UEL Campus, Dome, Stratford, Convoy’s Wharf) becomes important in the development of the “new city” and because of their intrinsic catalytic role in secondary developments, and the scale of market opportunity which they represent for creative businesses. New projects like Excel promise to act as anchors for a variety of exhibition and display services - Newham's publication of a directory of exhibition, design and display related companies are an early recognition of the importance of the support market. The media and design businesses in the city fringe - in a symbiotic relationship with the international financial markets of the City of London, offer an example of a similar pattern.

The future of the Greenwich Dome and the Stratford Railway Lands is therefore extremely pertinent to creative sector development in TGL. Decision makers determining these and other major development sites need to be persuaded of the centrality of knowledge and

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3 Mayor of London, Ken Livingstone, 2001
creativity to large-scale urban development and infrastructure. The propositions put forward in projects like the recently demised Legacy bid - offering a seriously large cluster of creative and related businesses - offer far more than retail or commercial leisure propositions. The position on the knowledge content of the Stratford project is far from clear and needs strong advocacy and brokerage.

*Thames Gateway has a large number of unattractive business, social, physical and "access" environments in many places.* Despite the pioneering spirit which has led artists to move into rundown areas offering few obvious facilities but cheaper property (starting with St Katherine's Dock in the 1970s, and moving eastwards and outwards since then), the creative sectors particularly in media related sectors are concerned as much about the quality of their business environment as lawyers and bankers. Transport issues are largely the same for this sector as others: poor access inhibits business; business will follow new transport infrastructure whether it is the Jubilee line (partly responsible for the creative regeneration of Deptford and Stratford) Excel, or the much needed new East London River crossings.

*The "city fringe" phenomenon will repay careful scrutiny.* The development since the early 1990s of an intensively developed small scale creative services zone around the Square Mile has not yet been replicated at the Isle of Dogs. As a model it needs to be carefully reviewed in the relation to North Greenwich/Woolwich and Stratford Railway lands, as well as in relation to TGLPs more eastern zones of change.

*Digital infrastructure is as important as roads, railways and bridges.* The creative sector will be a major user of broadband and future technology developments. TGL has the large scale digital network in place. It will be essential to get local nodes and links in place to allow film makers at, for example, Three Mills, to be able to work with colleagues in Soho and Los Angeles, as "offshore" specialists, building on the reputation of East and South East London’s craft and technical expertise in a competitive global market.

**Strategic issues**

**Foresight**

Foresight - integrated long term review and integration of long-term market, technology and other structural changes - is crucial for the success of London as a creative city. Foresight is essential in enabling industry to plan for technology, skill-related and market development and innovation. The small scale industry structure presupposes that foresight, investment in locally connective technology infrastructure, and knowledge transfer be supported at the outset, and perhaps partly into the long term by public funding.

TGLP has an important role in connecting foresight, public policy and locally/regionally determined programmes of support. There is an important task in getting a TGL "take" on global and national developments, so that good practice can be brought quickly into practice by micro-businesses and SMEs.

**Influence and investment**

- **The importance of brokerage and the role of the largest scale projects**

The role of the broker is demonstrated in the development history of Excel and the Stratford Passenger Station. In both cases persistent lobbying and promotion by public sector bodies - in the case of Stratford over a long period of time and seeking to influence TGL, regional,
national and international decision makers - have successfully secured significant investment from private/public sources.

- The importance of networks, support structures and intermediaries
In a situation where geography and industry structure tend towards a fragmented and individualised series of subsectors, freelancers, micro-businesses, start-ups and SMEs place a high value on networks for information, opportunity development, and for assistance with the growth of market-oriented relationships.

East London has good examples of network development in the form of Mazorca in the designer maker sector. At earlier stages of development are the work initiated in developing networks and co-production activity in the film and television sector by UEL; the work of Greenwich Dance Agency, East London Dance and of Chisenhale; and the embryonic new media network now hosted by East London Chamber of Commerce. A range of specialist support and intermediary organisations has grown up around the creative clusters in the city fringe. Taken together networks, agencies and intermediary organisations can provide a sector–led approach to support the industry that reflects the creative, professional and technical support needs of sub-sectors with very different ecologies.

Equity
- Sector development and exclusion
The timescale, types of investment and support structures for sector and enterprise development and those concerned with neighbourhood renewal and social inclusion are often working to different cycles and are driven by different pressures. It will be important to make a clear distinction between the strategies and processes required, rather than assuming an easy link between local cultural processes, the acquisition of basic level digital skills and the commercial pressures for small companies seeking specialised skills for immediate results. This reflects, as well, on the small number of large creative recruiters in the sub region.

- Talent in diversity
Talent, culture, creative, international, multi-lingual skills all represent potential assets in a knowledge and content-based economy. Too much potential is wasted by inappropriate or inadequate links between trainers and employers. This will be exacerbated in an industry structure which is small scale and individualised. TGL today is testing the ground that the whole of London will be standing on tomorrow. People and companies with creative and media skills developed in TGL this year and next will be exporting their talents elsewhere in London and the international creative skills market.

Summary

City making
This document advocates the role of the creative industries can play in city making, which should be promoted by TGLP and its national, regional and local development partners as an integral part of the economy, environment and culture of Thames Gateway. These include:
- Influencing, and helping define the character, culture and profile of the city and its citizens.
- Bringing high value adding processes into the economy.
- Reflecting making as well as high technology skills; high value products and services as part of a "knowledge" and "creativity" based economy.
- Enabling mixed economy development with pluralistic cultures and users to be at the centre of new city quarters; not just high value but essentially monocultural office, residential, and commercial leisure developments.
- Setting and implementing high quality design standards for the built environment and the public realm.
- Creating residential areas with distinctive design, cultural and amenity standards.

**Action Framework**

An action framework for the development and support of the creative industries in Thames Gateway London is set out in the main report (Sections 3, 4) and on the basis of the foregoing assessment has been structured around four themes:

- Infrastructure
- Supporting Creative Business
- Networks and People
- Foresight, Innovation and Knowledge

**East London Creative Industry Development Agency.**

The strategy proposes that TGLP takes a leading role in sponsoring the development of an East London Creative Industry Development Agency. The agency would be driven and bounded by tasks and timescale, and not by its own long-term existence. The agency would develop a Thames Gateway focussed capability to undertake the following roles:

- Support existing networks and agencies and provide a link between local, sub regional, pan-London and international initiatives.
- Act as a focal point for advocacy, promotion and support of the creative sector in Thames gateway.
- Act as a champion for funding and other investment which benefits the creative sector.
- Develop the networking capability and sector support.
- Develop partnership arrangements with other bodies.
- Disseminate information, and consolidate information networks to do this.
- Develop the research and information base for East London creative industries.

Details of this are set out in Section 3.
### SWOT

#### STRENGTHS
- City fringe clusters of design/visual and media create major London locus for innovation and knowledge in creativity and its application
- East London’s diverse and inclusive character encourages and attracts those choosing to develop cutting edge / experimental practice
- Reputation as a home to cutting edge innovation in key areas of contemporary creative industry practice – design – making – visual arts – dance etc
- Relative availability of affordable workspace in inner TG area for certain kinds of studio based and small scale arts, design and making activity
- Significant specialist sub-sector agencies and intermediaries providing industry support in the City Fringe
- Substantial areas of land for development allowing for large scale regeneration (Royal Docks, Stratford, Greenwich, Woolwich, convoy’s Wharf)
- Higher Education Institutions with international reputation in the visual and performing arts (Goldsmiths College, University of London, Laban Centre London, Trinity College of Music)
- Universities and FE Colleges with strong creative arts provision
- Film development – Three Mills and other location promotion
- TG is a policy priority for a wide range of national and regional bodies; with significant areas of eligibility

#### WEAKNESSES
- Lack of local markets/ outlets and production chains for many sub-sectors
- Lack of infrastructure for live arts in east of region
- Vulnerable hybrid public / commercial funding mix supporting fragmented industry with significant business skills, finance and networking needs
- Failure to exploit new technologies – and insufficient ICT infrastructure to attract technology dependent industries
- Whilst the TG area is a cultural workshop for London – a home to experimentation and production - it has little distribution / sales/consumption capacity (outside few venues/galleries)
- Industry fails to reflect the rich cultural diversity of East London and to exploit this in markets
- Lack of high profile industry leadership from within the black and ethnic minority creative community
- Poor cross-region transport links and variable cross London and national / international links (Road, Rail, Tube, Bus) and continued uncertainty re Cross Rail, CTRL, river crossings.
- Run down and degraded public realm, and public safety perceptions in many areas with limited attractive Town centre day and evening activity is unattractive to CCI clustering.
- Poor self image associating ‘success’ with outward migration
- Significant shortfalls in local skills and educational attainment and support for continuity & professional development.
- Lack of industry recognised training and difficulty of reconciling this need with major funders i.e. accreditation requirements, lack of flexibility.
- Lack of resources or use of resources to nurture & promote local talent beyond full time education to professional standards.
- Lack of foresight / industry intelligence, data and analysis.
- Lack of appropriate workspace and venues implications in terms of resources, human and financial
- The focus of funding generally is mainly towards inner London boroughs such as Creative Partnerships etc
### OPPORTUNITIES
- Expansion of TGLP – a new city with 100,000 homes creates opportunity for a new focus and fulcrum for east London. Creative Industries can contribute to the development of the soft and hard infrastructure of that new city.
- Scope for substantial residential development and consequent consumer/design/media etc market growth
- Major re-development sites in TGLP and possibility of attracting the Olympics and its legacy.
- Public policy as well as the City has turned East. GLA/LDA focus on TGLP creates opportunity for serious investment and development.
- Developing real beneficial links between the CCIs and the wider financial and industrial / manufacturing sectors in TGLP could give TGLP the edge in the “new economy”.
- Many of TGLP’s creative workers and businesses are committed to the area, want to stay and want to see it succeed.
- Opportunities for creative sector to promote themselves commercially through developments such as Excel and Stratford Cultural Quarter
- Capitalising on development nodes with HEIs, including new Laban Centre and Goldsmiths Arts Building, particularly in output of arts graduates and closer links with arts business and community
- Subregional structures in place for inward investment

### THREATS
- Expansion of the City, east, drives out Creative Clusters in North and South City fringe area if strategies not in place to strengthen and protect key clusters.
- Failure to identify and provide for appropriate re-location opportunities for displaced and / or growing companies within TGLP will cause migration of business, skills, talent and knowledge out of region.
- Failure to deliver ICT and Transport infrastructure in TGLP encourages migration of growing companies and discourages inward investment especially in high end technology companies.
- Increased London-wide and national competition for key skills in technology, in creativity and innovation allied to non-location specific e-commerce encourages migration
- Key markets and often professional “locus” in central / west London for many sub-sectors
- Failure to address education and skills attainment of TGLP population creates workforce without skills for new economy.
1. The Creative Industries In Thames Gateway London

1.1 Defining the Creative and Cultural Industries in Thames Gateway

The Creative Industries sector is an aggregation of a complex collection of industrial and creative sectors. Many – although not all – parts of the sector operate in a hybrid economy which crosses the boundaries between public, private and voluntary but the vast majority of companies and organisations are commercial businesses. The sector tends towards fragmentation and diversification and is dominated by freelance sole traders and micro businesses.

This strategy takes as its starting point the definition set by the DCMS Creative Industries Task Force:

“Those activities which have their origin in individual creativity, skill and talent, and which have their potential for wealth and job creation through the generation and exploitation of intellectual property. These have been taken to include the following key sectors: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software, music, the performing arts, publishing, software and television and radio.”

Visual Arts is added to this definition as neither the 1998 DCMS Mapping Document or the recently published revised Mapping Document properly accommodate the work of individual artists. In this study the Art Market is included in Visual Arts and the Antiques sector is excluded from the study.

Analysis in this report is based upon the definition of the creative and cultural industries sector in TGL and it should be noted that direct comparisons with other available data is difficult. The most recent report assessing the creative economy across London for example includes employment data for Sport and Recreation and Museums and Heritage but discounts engineering activities within the Architecture category.

TGL contains significant existing and potential opportunities for developing cultural tourism which reflects the range of creative and cultural histories and traditions encompassed in the region. This variety and richness spans two world heritage sites (Maritime Greenwich and The Tower of London), a world class arts complex at the Barbican, a number of small but significant museums and the unique cultural experiences provided by its distinctive street markets and creative quarters.

This strategy does not cover the tourism, heritage and museum sectors: further study into the potential of cultural tourism in the region is recommended.

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5 Creative Energy; the creative industries in London’s economy, LDP and GOL, 2000
The Creative and Cultural Industry Strategy for Thames Gateway London Partnership therefore covers:

<table>
<thead>
<tr>
<th>Media and Live</th>
<th>Design and Visual</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Dance</td>
<td>• Advertising</td>
</tr>
<tr>
<td>• Film, Video, TV and Radio</td>
<td>• Architecture</td>
</tr>
<tr>
<td>• Leisure Software, Software and Computer Services</td>
<td>• Crafts</td>
</tr>
<tr>
<td>• Music</td>
<td>• Design</td>
</tr>
<tr>
<td>• Performing Arts and Literary Activities</td>
<td>• Designer Fashion</td>
</tr>
<tr>
<td>• Publishing</td>
<td>• Visual Arts (incl. Photography)</td>
</tr>
</tbody>
</table>

The creative industry strategy encompasses a very broad range of interests and issues: from software development to furniture making and from advertising to dance. Most of this is private sector enterprise – from micro businesses to multinationals - but it embraces those parts of the industry which are publicly funded.

1.2 Creativity and the Creative Economy

Creativity has seldom carried a higher currency or had a higher profile. Across government and industry creativity is increasingly understood as a key to unlocking economic success in increasingly competitive global markets throughout all business sectors. Creative skills have been described as those which

"develop new, value-adding ideas and make things happen"  

The Government White Paper *Opportunity for all in a World of Change*  

sets out the government’s vision of the UK as a “knowledge driven” economy and the UK’s distinctive capabilities as “...our knowledge, skills and creativity”. Creativity, talent, imagination and innovation will be the central drivers of the economy in the new century.

"The core added value in the future economy will derive from creative processes, from the knowledge base and from the intellectual property rights so created"  

Investing in creative skills and talent and in creative and cultural enterprises will reap significant economic benefits not only in terms of their direct and central contribution to Thames Gateway London Partnership’s economic success but also in terms of the impact of a sustained creative environment on its wider industrial and business economy.

"Processes products and services are being developed faster and some companies are starting to show gains from innovation. However there is concern about levels of creativity as a constraint on innovation"  

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6 Design in Britain, 1999
7 Opportunity for All in A World of Change, DTI/DfEE 2001
8 Manufacturing in London, 1999
9 CBI Innovation Trends Survey, 1999
Developing an approach to investment, business support and skills development that places creativity, innovation and excellence at its centre will place Thames Gateway London Partnership in a strong position to build on the prosperity of the region.

1.3 The Creative Industries in Thames Gateway London

East and South East London has long been a centre for individual cultural and creative activity. Located just outside the historic boundaries of the old City it became a home for dissenters and cultural dissidents in the 18th century, a place where revolutionary ideas could be developed. Abney Park Cemetery in Hackney evidences the tradition of dissent in Hackney and among many revolutionary thinkers Mary Wollstonecraft, author of *The Vindication of the Right of Women*, was a resident of Stoke Newington. Tower Hamlets’ historic proximity to the thriving City and the Docks as well as its cheap housing has over centuries made it the entry point for successive new immigrant communities, from the Huguenots and Jews to, more recently, Bangladeshis and Somalis. Each new community has brought to the area a richness of tradition in culture and faith.

In recent times this tradition as a home of cultural inclusivity and experimentation has continued

- the groundbreaking work in theatre developed over half a century at the Theatre Royal Stratford East
- the tradition of excellence in developing Contemporary Visual Arts practice (the home of the Young British Artists) and contemporary dance at Goldsmiths/the Laban Centre
- the programming and ethos of The Whitechapel Art Gallery, The Albany, Hackney Empire and
- the development of a very 21st century model of a cultural quarter in Hoxton where cutting edge innovation in digital media meets traditional designer maker practice.

Spreading east from the edge of the City of London, the region has, with notable exceptions, been dominated by creation and production rather than distribution, exhibition/sale and consumption in most creative industry sectors. Indeed colonisation of derelict industrial spaces by artists’ communities represents the changing nature of the economic and employment base of TGL just as much as the exponential growth of the financial services sector.

In the emerging new economy, where innovation and experimentation, creativity and imagination are valued more highly than at any time in the past 200 years, the characteristics that define the creative industries in TGL – diversity, innovation, inclusion and individual exploration – are also the defining characteristics of success in the new economy.

1.3.1 The Structure of the Creative Industries in TGL

One of the critical factors in the Thames Gateway economy is the very small number of very large players. In the absence of a developed economy of major businesses who either commission creative work or who use creative services, the relative size of local authorities, universities and other public agencies gives them a prominence in the development of local supply chains for the creative sector.
There are no equivalents to the BBC and the related film and broadcasting complex in West London or the financial services in the Square Mile. The nearest equivalents are the newspaper businesses which relocated to Wapping and Isle of Dogs between 10 and 15 years ago; the legal and financial services which have established themselves in Canary Wharf; the print industry (albeit at the "manufacturing" end of the creative spectrum) in Greenwich and Lewisham. The Barbican Arts Centre is the sole international Arts flagship in the region. As for Ford, its future as a manufacturing presence in East London is severely curtailed, and it has recently relocated its design team to Soho.

In any event, it appears that these businesses have not yet developed the "city fringe" equivalent in TGL, a penumbra of neighbourhoods where easy access to relatively cheap studio and workspace has enabled a mass of small businesses to base themselves, and from which they can service the major businesses on their doorstep. An exception is the emerging clusters of visual artists and dancers in Lewisham / Deptford clustered around Goldsmiths and the Laban Centre which have an established international reputation for excellence in developing contemporary visual arts and contemporary dance practice.

Canary Wharf may yet provide the catalyst for a media services quarter (following the example of the city fringe in Islington, Hackney and Tower Hamlets). Excel provides another opportunity, and LB Newham's publication of a directory of exhibition and related services focussed on Excel is the kind of response which should be replicated.

In any event, many of the connections and alliances formed by creative businesses in Thames Gateway will continue to run East-West. The mental geography of many parts of the creative economy located in TGL connects to Soho, Cork Street, the regional and national broadcasters and the rest of the critical market mass which runs from the city to West London. Local authority boundaries, and the parochial limits of regeneration and other schemes neither reflect patterns of trade, information flow nor the source of talent and its application.

The TGL creative economy is not an insular proposition but depends at every stage of its development on interaction with the wider London creative economy which itself is part of a technology-driven, multinational dominated global market.

1.3.2 A sector dominated by freelancers and micro businesses

The London pattern - an “hour glass”\textsuperscript{10} in which there are very few very large companies, very many very small companies and few SMEs - is exacerbated in the Thames Gateway London sub-region. This throws an even sharper focus on the reliance of the creative economy - indeed the whole East/South East London economy - on very small companies. The implications of this include:

\begin{itemize}
  \item Highly fragmented and individualise networks, communication and production chains.
  \item High levels of start up and consequential small business failure.
  \item The need to construct training, business support and financial services for a small-scale industry structure.
  \item High graduate intake with low levels of continued professional development.
\end{itemize}

\textsuperscript{10} see Banking on Culture, Banking on Culture, 2000 for a full description of the “hourglass effect” in the Creative Industries across Europe.
• Unconventional career progression - from start up onwards.
• A premium on intellectual assets and equity.

This analysis, accepted now on a region wide basis, makes network, support, information, and adding value from intermediary and support agencies even more important. In the short term absence of industry derived support structures, it is even more important that industry values and requirements drive the initiatives promoted with public funding, through Business Link for London, LELSC, Local Authorities and Higher Education. It has been estimated that in London and the South East that

• 57% of VAT registered Creative Industry SMEs are sole Traders
• 38% of VAT registered Creative Industry SMEs employ 2 – 9 people
• 3% of VAT registered Creative Industry SMEs employ 10-19 people
• 2% of VAT registered Creative industry SMEs employ 20 – 99 people
• A tiny minority of VAT registered Creative Industry SMEs employ 100 or more people

In the South East it is estimated that almost 98% of Creative Business SME’s comprise sole traders and companies employing fewer than 20 people.

The evidence, limited as it is does seems to suggest that the percentage of self employment in the South East as a whole is significantly higher than the UK average for the creative industries sector. The evidence also points to a significantly higher percentage of creative industry fledgling and micro businesses located in the South East than in the UK as a whole.

Evidence from this study indicates that the creative industry structure in Thames Gateway London Partnership closely resembles this pattern with a small number of very large organisations – Excel, News International, The Barbican Arts Centre – and a very large number of micro businesses and sole traders.

1.4. Employment in the Creative Industries in Thames Gateway London

1.4.1 Difficulties in data collection

The DCMS Creative Industries Task Force in mapping the economic impact of the creative industries across the UK has made significant progress. However it is a cause of common concern across the industry that both within industry sub-sectors and at sub-regional level and below it is difficult either to extrapolate to the local from the national or to develop a local clear assessment of the size and economic importance of the sector.

In this study DPA has sought evidence from the Thames Gateway London Partnership region and from the London Development Agency (LDA) to assist in the process of developing an overview of the sector but the evidence from the sub-region itself has been patchy and cannot be usefully aggregated.

The DCMS Mapping Document asserts that the creative industries in the UK have grown dramatically over the last three years. Comparing the revenue generated by the whole sector between the first edition (1998) and the 2001 version, DCMS gives figures which show that UK revenue has increased from c£60 billion to c£110 billion. It is not clear how much of this is

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11 ONS Count of Creative Industry SMEs, CADISE 1999
12 Creative Industries Mapping Document (2001), op cit
attributable to growth and how much to more accurate, more thorough or more optimistic data collection.

In any event, it is hazardous to extrapolate figures on a regional or sub regional level from the national data which is on offer. In Creative Energy\textsuperscript{13}, DPA calculated - from existing regionally derived research - a London revenue of £16-20 billion for 1998, roughly one third of the UK total.

It has not been possible in this study to reach any firm conclusions about the economic contribution of the sector to the regional economy. Neither anecdote nor information shows any evidence in East London of 100% growth over three years although the employment data set out below does indicate a significant percentage growth in employment in the sector over the four years 1995 to 1999. Such employment data as is available indicates that c18% of London’s total creative industry employment is found in the eleven London local authorities within TGLP. At present it is not possible to calculate the revenues generated by TGL-based creative companies.

DPA has not provided a full assessment of the total number of creative companies in the Thames Gateway London Partnership region. The fragmented nature of the industry and the reliance on freelance activity means that any count of this sort will inevitably be partial.

1.4.2 Mapping the sector

To gain a fuller understanding of the structure, location and scale of each industry sub-sector across the region, a detailed Data Report\textsuperscript{14} has been provided to compliment the main creative and cultural industries strategy. This report assess the available data in more detail and assess the issues facing industry sub-sectors, their principle clusters and locations in the region and, where possible, their scale and structure. In order to gain a greater understanding of the size and structure of the creative sector DPA has undertaken detailed analysis of four sub sectors – Visual Arts, Film Video and Broadcasting, Dance and Design. Detailed analysis of each of these sectors along with an assessment of each industry sub sector is provided within the Data Report.

A number of sub-sector mapping and data collection projects are currently in train or being planned across the region. Those in train include:

- Mazorca: Designers / Makers
- Vision in Art: Visual Arts Network
- James Little: Film and Video
- ELCC: New Media / Media

Projects in development include:

- LFVDA: 2 year project to map film and video
- ACME: Lottery Funding received to research East London Artists Community

The London Boroughs of Newham and Lewisham have each recently undertaken a detailed assessment of the creative industry sectors in their boroughs. These studies provide both an

\textsuperscript{13} Creative Energy; the creative industries in London’s Economy, op cit

\textsuperscript{14} Thames Gateway London Partnership CCI Data Report includes detailed assessment of the key issues facing the creative industries in the TGL region, their defining characteristics as well as extensive data analysis.
assessment of the number of creative companies in each borough and strategies for taking forward creative industries development.

In Newham’s case initial research undertaken by Mazorca led to the appointment of an Officer with the dedicated task of undertaking further detailed research into the sector in the borough and, over time developing a comprehensive strategy for the sector’s development and support. To date this process has taken almost two years and has required considerable investment of financial and human resources. To get under the skin of the creative and cultural sector in any borough requires a similar investment of resources and this level of detail has been outwith the resources of this strategy.

We would, however, strongly urge TGLP’s local authority partners to undertake similar mapping projects at a local level. TGLP itself should seek to add value to these sorts of local initiatives by sharing expertise gained in other boroughs, by sharing information and by developing a common framework, format and categories for such pieces of work.

TGLP will have an important role to play in “networking” the networks and reaching agreement between agencies involved in sector mapping over information sharing and creation of common formats. At this stage the creation of a single database for Thames Gateway London Partnership does not appear to be realistic or necessary.

1.4.3 Employment and employment growth in the creative industries

DPA commissioned the GLA Research and Information department to provide the most recent (1999) NOMIS data in all potential creative employment sectors and to assess this against data from 1995. This enabled us to assess the relative strengths of each sub-sector and the industry as a whole over time and compared with both Great Britain as a whole and with the rest of London.

It should be stressed that this data does not fully reflect employment in the creative industries as it does not account for high percentages of sole traders or those with multiple or duel occupations. It will however offer a baseline assessment of the relative strength of sub-sectors and the industry as a whole from an employment perspective compared especially with the rest of London.

Table 1
Creative Industries Employment in Thames Gateway

<table>
<thead>
<tr>
<th>CCI Employment in TGL</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>61,308</td>
</tr>
<tr>
<td>1999</td>
<td>72,761</td>
</tr>
</tbody>
</table>

Figures are based on:
1995 Annual Business Enquiry realigned for comparison
1999 The Annual Employment Survey
These figures do not include the self employed. They are workplace based so they count all those working in that area no matter where they live.
National figures are for Great Britain not the UK.
In the period 1995 to 1999 the UK economy and that of the Thames Gateway was in a (still continuing) process of dramatic restructuring. The decline in traditional manufacturing and the growth in the less traditionally structured service sector of the economy allied to technological convergence has lead to an increase in self employment and partnership, short term and contract working. And these are the dominant features of the creative sector. We can therefore assume that there is significantly more employment in the creative sector in TGL than reflected in the Annual Employment Survey.

Table 2:

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain</td>
<td>11.5%</td>
</tr>
<tr>
<td>London</td>
<td>17%</td>
</tr>
<tr>
<td>TGL</td>
<td>16%</td>
</tr>
</tbody>
</table>

All Data Annual Business Enquiry (1995) and Annual Employment Survey (1999)/ ONS. The Total Employment Figures are aggregates from which agriculture class 0100 (1992 SIC) has been excluded.

Analysis of the Annual employment Survey also allows us to assess the relative strength of the creative and cultural industries sector as compared with the whole of London.

Table 3:
Creative Industries share of total TGLP employment

<table>
<thead>
<tr>
<th>Employment Sector</th>
<th>Date</th>
<th>Total</th>
<th>CCI Share of TGLP Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative Industries</td>
<td>1995</td>
<td>61,308</td>
<td>9%</td>
</tr>
<tr>
<td>All Employment Sectors</td>
<td>1995</td>
<td>704,008</td>
<td>-</td>
</tr>
<tr>
<td>Creative Industries</td>
<td>1999</td>
<td>72,761</td>
<td>9%</td>
</tr>
<tr>
<td>All Employment Sectors</td>
<td>1999</td>
<td>826,296</td>
<td>-</td>
</tr>
</tbody>
</table>

In the period 1995 to 1999 it appears that employment in this sector grew slightly in TGL but that the region’s share of London’s employment in these sectors declined by perhaps less than 0.5%. The margins of change are however insignificant.

1.4.4 Geographic Spread of Creative Industry employment in TGL

The Annual Employment Survey gives us a partial picture of employment in the sector across each borough within TGL. We can break down the available consistent data as follows:
Table 5:
Geographic Spread of Employment (NOMIS 1999)

<table>
<thead>
<tr>
<th>Borough</th>
<th>Re total TGLP CCI Employment (1999)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>%age</td>
</tr>
<tr>
<td>Barking and Dagenham</td>
<td>2%</td>
</tr>
<tr>
<td>Bexley</td>
<td>4.5%</td>
</tr>
<tr>
<td>City of London</td>
<td>20%</td>
</tr>
<tr>
<td>Dartford</td>
<td>2%</td>
</tr>
<tr>
<td>Greenwich</td>
<td>5%</td>
</tr>
<tr>
<td>Hackney</td>
<td>14%</td>
</tr>
<tr>
<td>Havering</td>
<td>4%</td>
</tr>
<tr>
<td>Lewisham</td>
<td>5%</td>
</tr>
<tr>
<td>Newham</td>
<td>3%</td>
</tr>
<tr>
<td>Redbridge</td>
<td>5%</td>
</tr>
<tr>
<td>Thurrock</td>
<td>1.5%</td>
</tr>
<tr>
<td>Tower Hamlets</td>
<td>29.5%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>5%</td>
</tr>
</tbody>
</table>

This table needs to be read with care. Evidence from detailed analysis of the scale and location of four industry sub-sectors – Film and Broadcasting, Dance, Visual Arts and Design - clearly indicates businesses and individuals trading in these sectors in strong clusters of activity in Lewisham, Greenwich and Newham.

Notwithstanding this data reflects the heavy concentration of employment in these sectors in the City of London, Hackney and Tower Hamlets which between them account for 63.5% of total employment identified through the Annual Employment Survey.

Section 2 of this report assesses in more detail the developing creative clusters and centres of activity in TGL Zones of Change.
2. Creative clusters and centres of activity in Thames Gateway

2.1 Local presence of creative sector, and its development potential

The relative fragmentation of the creative sector in Thames Gateway requires an understanding of the local geographies where creative businesses are currently active, and on the presence or absence of local creative communities and/or clusters. In broad terms, the spread of these runs from west to east through the sub region, which reflects the pattern of diminishing complexity and intensity of cultural and creative production the further east one goes into the Gateway.

There are a number of districts and neighbourhoods where one or more of the following factors is animating a significant amount of creative economic development, and which has already been prioritised by public agencies for policy and/or funding support.:

- An existing concentration of individuals and/or businesses in one or more creative subsectors
- Public institutions, particularly local authorities and Universities engaged in development activity
- A multiplicity of public funding arrangements aimed both at industry immediate issues
- Infrastructure - particularly transport - investment and improvements.
- Indications that there is growing economic activity in one or more creative subsectors
- A combination of creative/cultural production and a consumer/public market
- An existing perception and profile of such activity

Further assessment of these animating characteristics in particular local contexts will enable the agencies involved in creative industry development to review the basis for further development. This will help in addressing the kinds of interventions which will be required for sustainable investment and development.

In addition, the data summarised in Section 1 sets out on the basis of the location of businesses and their employees the concentration of the creative sector workforce in the City of London, Hackney and Tower Hamlets, and points to significant presence in one or more of the film, dance, visual arts and design sectors in Lewisham, Greenwich, and Newham.

It is our assumption that research into the other significant parts of the creative sectors across the sub-region (architecture, design, news media, music, performing arts, and creative software development) would show that this pattern would be reinforced rather than challenged or reversed. Creative industry presence in TGL is in the inner London boroughs and at the west end of the sub region: key issues here are providing the conditions for sustainable growth, and tackling and particular sectoral and/or urban constraints.

The chart on the next two pages shows an initial assessment, for the purposes of this study, which set out a preliminary listing of areas as follows:

Areas where there is demonstrable activity

whether this has arisen by historical investment and aggregation of business activity or by direct intervention from public and partnership activity. Development issues include:
• The need to sustain a mixed creative economy in the face of property market pressures
• The need to link crafts, fashion and designer makers more effectively with manufacturers
• The potential for developing creative service sectors for major commercial zones
• The development potential for new creative businesses located around major academic, creative and cultural institutions
• The importance of transport and related infrastructure improvements in connecting makers and markets

Areas of immediate potential
where there is evidence of the initial stages of developing creative and cultural economy as a structural part of the overall regeneration and development. Development issues include:
• The need to develop networks, support structures and the soft infrastructure (technology and services)
• The importance of major projects such as Excel as catalysts
• The danger of over-reliance on single projects
• The length of the development cycle for infrastructure investment

Areas with development aspiration
where there appears to be a realistic determination to develop locally based creative and cultural economic activity. Development issues include:
• The role of public sector agencies in providing infrastructure
• The importance of branding, profile and market credibility
• The need for access to markets and audiences
• The unpredictability of identifying the next Hoxton

Visitor/audience/retail areas
where there is some evidence of a visitor/audience/retail based concentration of activity, but rather less information about creative businesses and makers; and a presumption that there is little other than local creative economic activity.

These are a preliminary set of findings, and do not include a complete assessment of characteristics or development issues. In addition a more detailed analysis would allow some of these rather inclusive areas ("Hackney"…"Tower Hamlets") to be broken into smaller districts and neighbourhoods, with a view to understanding more clearly what is going on at local level. This would also enable the next level of definition to be developed in locating where particular sectors and subsectors are strongest. However, this is beyond the scope of this subregional strategy, and falls more directly into the remit of neighbourhood and borough based development agencies and partnerships.

Examples of work carried out at this level includes the locational data commissioned by LBs Newham and Lewisham, and held in borough based business directories; the sectoral and localised work carried out by Tower Hamlets CIDA and LB Hackney; and the analysis which forms part of the Creative Business Enterprise Zone promoted in Deptford by Goldsmiths College, APT and others.
## Areas where there is demonstrable activity

<table>
<thead>
<tr>
<th>District</th>
<th>Key creative/cultural economy characteristics</th>
<th>Development potential/issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>City Fringe (Spitalfields / Shoreditch / Hoxton / Whitechapel)</td>
<td>New media, Film and TV, design, printing and related businesses working with finance, legal, advertising etc. Designer makers, Visual Arts, Performing Arts / the Barbican</td>
<td>Sustaining creative balance - particularly in relation to lower cost workspaces - in face of property market pressures</td>
</tr>
<tr>
<td>Tower Hamlets</td>
<td>Visual arts studios/galleries, Designer makers, Furniture, Fashion design, Film and TV</td>
<td>Addressing loss of Studio complexes i.e. at Cable Street and sustaining creative balance - particularly in relation to lower cost workspaces - in face of property market pressures, Potential to develop Designer Maker / Craft / Designer Fashion linkages with local manufacturing traditions i.e. East end rag trade, and textile importers and furniture manufacture</td>
</tr>
<tr>
<td>Isle of Dogs, Wapping</td>
<td>Newspaper Publishing, Telehouse (Advertising), Dance</td>
<td>Significant potential to develop design and media services cluster to service both the Print / Publishing Industry and the Financial Services Industry.</td>
</tr>
<tr>
<td>Hackney</td>
<td>Visual arts studios/galleries, Designer makers, e.g. Furniture, Fashion design, Music, Film and TV</td>
<td>Strategies required to support sustainable work/work live space, Marketing, network development, Music and access/training opportunities at Ocean, Proposals for the development of the Hackney Cultural Quarter need to be joined to wider networks.</td>
</tr>
<tr>
<td>Deptford Creekside/ West Greenwich</td>
<td>Dance, Artists studios/galleries, Small scale performing arts, HEIs - Goldsmiths, Laban, &quot;Deptford Creative Zone&quot;</td>
<td>New Laban centre will create significant additional focus for Dance and related services in already major Dance cluster in the Region, Visual Arts Workspace developing potentially replicable models for the development of sustainable and affordable premises, Potential for the development of innovation / incubator space associated with Goldsmiths, Creekside redevelopment &amp; Liner Terminal will bring regeneration benefits but may increase pressure on property values, Improved transport connections to central London will add pressure to property values and may encourage wider dispersal of artists and audiences, Deptford Creative Zone partnership provides effective partnership and cross sector lead for CCI development</td>
</tr>
</tbody>
</table>
## Areas of immediate potential

<table>
<thead>
<tr>
<th>District</th>
<th>Key creative/cultural economy characteristics</th>
<th>Development potential/issues</th>
</tr>
</thead>
</table>
| Greenwich /Greenwich Peninsula | Small but growing clusters of creative and cultural activity including: Dance, Visual Arts, Print/Publishing, Developed visitor economy | • Growth around Trinity College of Music  
• Future of Dome site |
| Stratford / Three Mills | Film TV, Performing arts, Exhibition, Design, Visual arts                                                         | • Rail lands: international link  
• Technology and specialist service infrastructure including Sohonet link  
• Sustainable CCI sympathetic investment in Three Mills  
• Significant investment by local authority in CCI Mapping and Strategy development indicates that structures and Partnerships are in place to respond to significant opportunities.  
• Closure of Carpenters Road Studio complex a significant impact on Visual Arts Community |
| The Royals             | Excel: exhibition/trade fair, University of East London Campus, Water sports, Continued neighbourhood renewal and house building | • Creative service growth around UEL, Excel and RD Business Park |
| Woolwich Arsenal       | Woolwich Arsenal: includes: Museum visitors, occasional studio and film use. Small scale town centre cultural businesses | • Build on Museum and interim uses  
• Impact of removal of University of Greenwich |
### Areas with development aspiration

<table>
<thead>
<tr>
<th>District</th>
<th>Key creative/cultural economy characteristics</th>
<th>Development potential/issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walthamstow</td>
<td>Artists and new media studios</td>
<td>• New library/arts centre complex</td>
</tr>
<tr>
<td>Barking</td>
<td>Public led developments around Town Centre</td>
<td>• SRB cultural industries quarter</td>
</tr>
<tr>
<td>Redbridge</td>
<td>Town Centre development studies currently in hand</td>
<td>• Broadening and consolidating commercial provision; providing choice and quality in venues; marketing Town Centre as serious and diverse centre for cultural and creative activity</td>
</tr>
<tr>
<td>Romford</td>
<td>Clubs and pubs</td>
<td>• Broadening and consolidating commercial provision; providing choice and quality in venues; marketing Town Centre as serious and diverse centre for cultural and creative activity</td>
</tr>
<tr>
<td>Ilford</td>
<td>Town Centre development studies currently in hand</td>
<td>• Broadening and consolidating commercial provision; providing choice and quality in venues; marketing Town Centre as serious and diverse centre for cultural and creative activity</td>
</tr>
<tr>
<td>Dartford</td>
<td>Theatre&lt;br&gt;Mick Jagger Centre</td>
<td>• Future of University of Greenwich location in doubt</td>
</tr>
<tr>
<td>Thurrock</td>
<td>Retail</td>
<td></td>
</tr>
</tbody>
</table>

These are preliminary listings and do not include a complete assessment of characteristics or development issues.
2.2 Locating the creative sector in Thames Gateway in a wider context.

The charts following this section set out a preliminary assessment of the creative sector and its infrastructure in Thames Gateway. Using a categorisation developed by John Lock of the University of East London and tested by DPA in Brighton and Hove and elsewhere, some of the key components of the creative industries in TGL have been placed in one of these categories:

National and International Significance reflected in one or more of the following factors:
- International recognition and talent magnet
- Large scale attractor of resources
- Increasing international visitors and multi-national involvement
- Recognisable brand

Regional significance reflected in one or more of the following factors:
- Significant community of creative companies and individuals
- Extensive collaboration between companies
- A sustainable “internal” market
- Growing international markets and connections
- Flourishing freelance/micro business climate
- Established or emerging professional networks
- Peer group acknowledgement

Sub regional significance reflected in one or more of the following factors:
- Growth of integration with market and creative activity in London and SE
- Jobs being created and sustained
- Growth in facilities for production alongside venues
- Developing freelance/micro business economy
- Developing professional etc networks evident
- Developing intermediary market: producers, managers, agents, etc.

This is not a complete assessment, and further work might be undertaken to refine it over the next period of creative industry strategy development. It is offered as a useful tool in assessing the strength of the assets which TGL has at the core of its new economic future and as the building block for the new “East” city. A crucial strategy issue is how best to move sectors, businesses and facilities from subregional to regional, from regional to national and onto international significance.
In Thames Gateway the creative sector and infrastructure is of National & International Significance

<table>
<thead>
<tr>
<th>National &amp; International Significance</th>
<th>London-wide Significance</th>
<th>TGL Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>International recognition and talent magnet</td>
<td>Significant community of creative companies/individuals</td>
<td>Growth of integration with market and creative activity in London and SE</td>
</tr>
<tr>
<td>Large scale attractor of resources</td>
<td>Extensive collaboration between companies and a sustainable &quot;internal&quot; market</td>
<td>jobs being created and sustained; growth in facilities for production alongside venues</td>
</tr>
<tr>
<td>Increasing international visitors and multi-national involvement</td>
<td>Growing international markets and connections</td>
<td>developing freelance/micro business economy; professional etc networks; intermediary market; producers, managers, agents, etc.</td>
</tr>
<tr>
<td>Recognisable brand</td>
<td>Flourishing freelance/micro business climate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Established or emerging professional networks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Peer group acknowledgement</td>
<td></td>
</tr>
</tbody>
</table>

Knowledge Community

| Goldsmiths                                                                                           | UEL Knowledge Dock                                                                        | Skills Observatory                                                              |
| Trinity College of Music                                                                              | Circus Space                                                                              | (Greenwich, UEL, Goldsmiths) database of creative industries and arts courses    |
| Laban Dance Centre                                                                                   |                                                                                          | Dagenham Priory Arts College                                                     |

Creative and Cultural Sectors (virtual communities)

| Some digital, film, TV, design and music companies                                                   | Digital media and software development                                                   | Interactive leisure software                                                     |
| Newspaper Publishing                                                                               | Printing                                                                                  | Graphic design                                                                  |
| Specialist digital media companies servicing (multi)national companies                              | Club and commercial music                                                                  | Publishing                                                                      |
| E London visual artists studios                                                                    | Designer Makers                                                                           | Architecture                                                                    |
| High technology engineering design                                                                 | Writers and journalists                                                                    | Advertising                                                                    |
|                                                                                                      | Contemporary dance                                                                        | Crafts                                                                          |
|                                                                                                      | Street and festival arts                                                                   | Film television and radio production                                           |

Creative and Cultural Sectors clusters (real communities)

| City fringe design/digital/media/visual                                                             | Deptford Visual and Performing                                                              | Stratford Cultural Quarter                                                       |
| Hackney and Tower Hamlets Visual artists studios and groups                                        | Lewisham / Deptford Dance                                                                    | Hidden Art Hackney                                                              |
|                                                                                                      | Stratford performing and visual                                                            |                                                                                 |
|                                                                                                      | Chisenhale                                                                                 |                                                                                 |
|                                                                                                      | Mondial TV (Shacklewell Studios)                                                           |                                                                                 |

Infrastructure

| Telehouse                                                                                           | Excel                                                                                     |                                                                                 |
| E London digital cable network                                                                      | Newham Online                                                                             |                                                                                 |
| Dome                                                                                                 |                                                                                          |                                                                                 |

Brokers/Agencies etc

| Mazorca                                                                                             | CIDA                                                                                      |                                                                                 |
| LFVDA                                                                                               | E London Dance                                                                            |                                                                                 |
| East London Film Fund                                                                                | Greenwich Dance Agency                                                                    |                                                                                 |
|                                                                                                      | Vision in Art                                                                             |                                                                                 |
|                                                                                                      | Studio organisations                                                                      |                                                                                 |
|                                                                                                      | Urban development                                                                         |                                                                                 |
In Thames Gateway the creative sector and infrastructure is of... | National & International Significance | London-wide Significance | TGL Significance
---|---|---|---
International recognition and talent magnet | Large scale attractor of resources | Significant community of creative companies/individuals | Growth of integration with market and creative activity in London and SE jobs being created and sustained; growth in facilities for production alongside venues developing freelance/micro business economy; professional etc networks; intermediary market; producers, managers, agents, etc.
Increasing international visitors and multi-national involvement | Extensive collaboration between companies and a sustainable “internal” market | Growing international markets and connections | 
Recognisable brand | Flourishing freelance/micro business climate | Growing international markets and connections | 

Business tourism | Business tourism | Business tourism | Business tourism
Some Excel hosted events | Some London Arena hosted events | Some Excel hosted events | Some Excel hosted events

Cultural Tourism, museums and galleries | Maritime Greenwich | The Geffrye Museum | Stratford Cultural Quarter
Tower of London | Brick Lane | Three Mills | Three Mills

Venues/Performance facilities/ Museums and Galleries and programming | The Barbican | Theatre Royal Stratford East | The Albery
| Hackney Empire | The Queen’s Theatre Hornchurch | Greenwich Theatre | Greenwich and Dockland Festival | The Orchard, Dartford | The Broadway Theatre/ refurbishment | The Barbican
| Hales Gallery | Greenwich Theatre | Greenwhich and Dockland Festival | The Orchard, Dartford | | The Malthouse /studio development | The Malthouse /studio development
| The Stephen Lawrence Centre | The Lux | The Albury | The Albury | | Kenneth More Theatre, Redbridge | Kenneth More Theatre, Redbridge
| Circus Space | | | | | | |
2.3 Thames Gateway's Zones of Change

Thames Gateway Strategic Executive has commissioned a study\(^{15}\) that sets out a development scenario for Thames Gateway based around a number of centres and foci of economic development and renewal which contribute substantially to the economic growth of the whole sub-region. Taken together, it is proposed that these six "Zones of Change" form the basis of "the offer which Thames Gateway London has to make to the economy, environment and social fabric of London and the South East."

The six zones of change are:
- Canary Wharf/Isle of Dogs
- Stratford/Leaside/Royals (Arc of Opportunity)
- Lewisham/Deptford/Greenwich
- Greenwich Peninsula
- Barking/Havering Riverside
- Woolwich/Belvedere/Erith

This is a development opportunity driven model, which takes into account the key strengths which each economic sector displays in each zone, and which sets out an initial list of constraints and opportunities in each area. As for the creative industries, the report only mentions creative and cultural sectors as modest contributors to the development future of Lewisham/Deptford/Greenwich and Woolwich/Belvedere/Erith. In any event, because of its focus on underused land, it does not cover areas such as the City Fringe which are of real value and importance, and which form a key part of the creative industry asset base of Thames Gateway.

This approach to development does however propose a number of opportunities for the creative industries in each of these areas, thereby influencing, and helping define the character, culture and profile of each of the zones of change. These include:
- Reflecting making as well as high technology skills; high value products and services as part of a "knowledge" and "creativity" based economy
- Enabling mixed economy development with pluralistic cultures and users to be at the centre of the zones; not just high value but essentially monocultural office, residential, and commercial leisure developments
- Setting and implementing high quality design standards for the built environment and the public realm
- Creating residential areas with distinctive design, cultural and amenity standards

---

\(^{15}\) TG(L) Regeneration Zones of Change: MCA Regeneration 2001
2.4 Strategy development issues
The main issues and/or conclusions that arise from these analyses include:

- TGL has only a small number of institutions and organisations that play at a national and international level (which is not to say that there are not a large number of individuals and small businesses which operate in an international market).
- For “a city” – the TGL area - of 3 million people the infrastructure is poor and has suffered many years of under-investment.
- There are likely to be significant structural issues for many of the sectors which currently operate effectively in TGL on a regional basis, before they could operate at a level of sustained international recognition.
- As much attention needs to be paid to the market pressure and congestion and other environmental issues which threaten the vitality of existing inner city cluster, as should be given to the development of zones of change further east.
- The role of the largest projects (for example Excel; Stratford; Greenwich; Dome; Covey’s Wharf) is important because of the scale of market opportunity which they represent for creative businesses. The future of the Dome and the Stratford Railway Lands is critical to creative sector development in TGL.
- Decision makers determining these and other major development sites need to be persuaded of the centrality of knowledge and creativity to large-scale urban development and infrastructure.
- TGL has a large number of unattractive business, social, physical and "access" environments in many places. Infrastructure and environment are important to the sector: poor access inhibits business; business will follow new transport infrastructure.
- Digital infrastructure is as important as roads, railways and bridges.
3. Action framework for the Creative and Cultural Industries

3.1 Summary

Section 2 of this report has set out the challenges and opportunities facing the creative industries sector in TGL. The complex economic and creative relationships that lie at the heart of the creative industries are its major strength but can make the sector appear impenetrable and adverse to the best intentions of public policy. The interchange between public and private, between cutting edge and commercial, between the individual artist and the global corporation creates an ecology which needs to be sustained and enriched for long term economic and social benefits to be achieved across the region.

The creative sector in the region appears to be fragmented but not widely scattered. Evidence indicates an even greater concentration of creative business activity in the Inner East and South East Boroughs than predicted with virtually no activity in some Outer London Boroughs, Thurrock and Dartford.

The implications for public policy in the face of the expansion of the city eastwards and the exponential rise in property prices in areas bordering the city are significant. Public Agencies will need to work closely with creative communities in these areas to sustain clusters wherever possible and to understand and respond to the wider property, infrastructure and lifestyle requirements of those forced to relocate.

Informal contacts and social skills are a central feature of this sector and increasingly the network is emerging as the organisational form most suited to it. Given the specificity of sub-sector needs and complexity of their internal ecologies a central feature of public policy response must be based on developing the role of individuals and organisations able to build networks, broker new business synergies and provide a link into pan-London and sub-regional funding and policy making agencies.

3.2 Action Framework

This section sets out an ambitious Action Framework for the development and support of the creative industries in East London. This Action Framework is structured around four themes:

- Infrastructure
- Supporting Creative Business
- Networks and People
- Foresight, Innovation and Knowledge

The Action Framework proposes 18 targets for Thames Gateway London Partnership and its partners. It sets out the range and types of targets the region should be aiming for over a 5-10 year period. It does not set out the specific detailed actions at this stage as these will need to be developed and prioritised in line with the availability of investment, the engagement of partners and the wider infrastructural development within TGL.

Most of all, however, a strategy for the long term and sustainable development of the creative economy in TGL can only be acted upon when dedicated structures and core investment is in place. Section 4 of this report sets out a detailed first Phase Action Plan (2001-03) which has the objective of putting the structures and expertise in place to enable the long term development and implementation of the Creative Industries Strategy.
3.2.1 Infrastructure

Unlike its predecessor, the LDDC, TGLP has the opportunity to consider, in the context of the new city zones it is planning, the kind of civic and cultural institutions which the new city vision should incorporate.

The role of the largest projects becomes important in the development of the “new city” of TGL, and because of their intrinsic catalytic role in secondary developments, and the scale of market opportunity which they represent for creative businesses. New projects like Excel promise to act as anchors for a variety of exhibition and display services - Newham's publication of a directory of exhibition, design and display related companies are an early recognition of the importance of the support market. The media and design businesses in the city fringe - in a symbiotic relationship with the international financial markets of the City of London, offer an example of a similar pattern.

The future of the Greenwich Dome is therefore extremely pertinent to creative sector development in East London. The propositions put forward in projects like the recently demised Legacy bid - offering a seriously large cluster of creative and related businesses - offer far more than retail or commercial leisure propositions. The Dome could cover the whole of Soho, and if targeted even in a significant part at companies developing in the knowledge economy would shift London’s centre of gravity eastwards in a dramatic fashion.

At Stratford, the "cultural quarter" and its extension towards the Lea (film and music businesses at Three Mills, design and display companies at Mill Meads) sits at the edge of the railway development lands which will form a larger development zone than the Isle of Dogs over the next ten to fifteen years. The opportunity to build on existing creative and cultural activity as a core feature in this development represents one of the most exciting prospects for the creative sector in the whole TGL region.

There is a real challenge in developing new facilities which serve and reflect TGL’s diverse Black and ethnic communities. The lack of high profile Black and Asian cultural organisations, sustained with appropriate levels of funding, is a major matter of concern, marginalising the cultural perspectives, heritage, talent and vision of large parts of TGL’s diverse communities. Proposals for the development include a number of new Black and Asian-led cultural organisations including the Rich Mix Centre and the Stephen Lawrence Centre will go some way to addressing these concerns. It will be important that that sector mobilise investment, support and international promotion to ensure that these projects can be properly established as integral new additions to TGL’s and London’s cultural infrastructure.

The creative industries have a central role to play in city making, and Thames Gateway London Partnership and its regional and local development partners should promote this. Equally the region’s physical and virtual infrastructure and the quality of its public transport networks will have a significant impact on the long-term success of the creative industries in the region. Priorities for infrastructure development include:

- Setting and implementing high quality design standards for the built environment and the public realm.
- Influencing, and helping define the character, culture and profile of the city and its citizens.
- Bringing high value adding processes into the economy.
• Creating the ICT infrastructure to sustain and develop jobs and businesses working in the new economy.
• Reflecting making as well as high technology skills; high value products and services as part of a "knowledge" and "creativity" based economy.
• Enabling mixed economy development with pluralistic cultures and users to be at the centre of new city quarters; not just high value but essentially monocultural office, residential, and commercial leisure developments.
• Creating residential areas with distinctive design, cultural and amenity standards.

**INFRASTRUCTURE TARGETS**

The sector faces an urgent and significant need for the development of property strategies which are permeable to its needs and which address the impact of the property market, City expansion and gentrification on key Design and Visual and Media clusters. The strategy needs to ensure a supply of affordable premises for studios, workshops and other creative micro and SME uses from incubator and start up units to options for growing and successful companies to remain located in key clusters.

**TARGET**

To ensure a supply of quality, affordable and secure workspace for the creative industries in key central locations and creative clusters in order to retain and attract creative talent in/to the region.

The strength of the property market and the eastwards shift of the City add pressure to the need to understand, identify and support existing and emerging creative clusters. This will include:

• acknowledging the significance of the Design / Visual / Media cluster in City Fringe areas of Hackney and Tower Hamlets
• making planning for its long term survival a priority for the region
• undertaking research into key creative clusters to develop holistic approaches to cluster support in Deptford and Greenwich
• identifying Stratford as a major potential growth area for creative cluster growth and cultural quarter development in the region.

**TARGET**

To roll out a programme ensuring the survival of existing and development of emerging creative clusters across the region over time whilst promoting and protecting the significance of the city fringe creative clusters to the regional economy.

The greatest growth potential in the creative industry sector lies in the exploitation of new technologies to develop new products and reach new markets. Access to bandwidth is set to become the key-determining factor in media sector location decisions and for media sector success. The ability to invest in and maximise the potential of new technologies will be a key factor in the growth of TGL’s creative economy. At present access to broadband, especially for micros businesses and sole traders, is limited in the extreme and left to the market alone will continue to become available on a patchy basis and with uncertain reliability. For this reason a priority will be to provide access to Broadband networks for creative businesses in the region.
To make Broadband accessible to every creative business in the region.

There are significant potential opportunities for the creative industries deriving from the largest projects like Excel and the Dome. The lack of high profile Black and Asian venues and companies will start to be addressed if proposals for The Rich Mix Centre and other large capital projects receive lottery funding. The development of a Black and Asian Cultural infrastructure, and leadership is a priority for cultural planning in the region and a significant market opportunity.

**TARGET**

To maximise the benefits to the creative industries from major flagship projects such as Excel and the Dome redevelopment; to ensure that the regeneration of the TGL region includes the delivery of new cultural infrastructure, reflecting the diversity of the region’s existing communities.

The region is the most significant in Europe in terms of regeneration and development sites and there is an opportunity to build design quality, cultural and creative infrastructure and opportunity into new residential and business areas. Transport links to Central London, other cluster/creative zones, across the region and to international travel are essential to a sector which looks further afield for its main markets. Improving local town centres and developing a wider critical mass of creative/cultural/lifestyle opportunities in an area, during the daytime and evening, will be a key factor in attracting consumers and creative businesses to an area as will more general improvements to the built and green environment.

**TARGET**

The development of Thames Gateway’s new city with creativity at its heart – providing significant opportunities for cultural businesses to play a central role in the development of new communities and the regeneration of existing Town Centres, their built environment, economy and leisure opportunities.

### 3.2.2 Supporting creative business

The creative industries sector contains perhaps the largest number of self-employed individuals across all employment sectors in the UK. In general across the UK the sector is fragmented and heavily based on these individuals and on Micro businesses and SMEs. In the South East of England it is estimated that almost 98% of creative business SME’s comprise sole traders and companies employing fewer than 20 people. TGL has few large creative companies and evidence from this study indicates that the creative industry structure in TGL closely resembles this pattern.

This is a diverse sector of the economy, where growth often takes the form of innovation, spin-offs, start-ups, and diversification. The impact of technological convergence allied to media industry deregulation has structured the creative industries around a very small number of very large companies and a very large number of very small companies; an “hourglass” effect replicated across Europe.¹⁶ The network is emerging as the organisational form most suited to the changing economy and to the creative sector in particular¹⁷. This has significant implications on public policy and on the ability of the industry to organise itself.

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¹⁶ For a description of the Creative Industries sector across Europe see *Banking on Culture*, 2000

¹⁷ *Creative Skills; skills for London’s creative industries in the digital age*, LDP and LSFU, 2000
The business support needs of the creative sector need to be met with flexible, specialist solutions which reflect the structure and priorities of the sector, that can be delivered both on and offline and that exploit the specialist skills and networks within the region and the tendency of the sector to cluster in small geographic locations. The sector also suffers from difficulty in accessing investment finance and venture capital, especially for sums between £10,000 and £250,000.

Thames Gateway London Partnership has the opportunity to build an effective partnership with the LDA and CSG to develop and pioneer innovative new structures for the delivery of business advice to the sector and the development of new financial Mechanisms to support investment in the sector.

Black and Asian Creative Entrepreneurs have particular difficulty in accessing business support and investment finance for their enterprises. It is essential that opportunities be continuously extended to enable people of all backgrounds, reflecting TGL’s multiple diversity, to establish and manage creative businesses and cultural institutions, and to develop their creative talents.

**SUPPORTING CREATIVE BUSINESS TARGETS**

*Business support, and professional development and training structures need to reflect the realities of the structure of and constraints upon the creative industries and respond decisively and effectively to their needs. Business Link For London, the Business Advisory Service, LELSC, creative and cultural business advisory and development services will need to reflect this and work closely with the creative sector in order to offer flexible sector-specific business support and training for freelancers, micros and SMEs which is sub-sector driven not agency led. Particular energy should be directed to targeting and supporting Black and Asian-led creative businesses.*

<table>
<thead>
<tr>
<th><strong>TARGET</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pioneer the delivery of flexible and sector specific business advice services to the creative industries in the region which are recognised across London as being ground-breaking in the extent to which they reflect the realities of trading in the new creative economy.</td>
</tr>
</tbody>
</table>

The creative industries in TGL are fragmented and apart from “east end artists” and the emerging “Hoxton” brand have limited presence in local, regional and national markets. Thames Gateway London Partnership can make a significant contribution by advocating the needs of the sector at local, sub-regional, regional and national policy levels and by working with partners to develop support for market development for individual companies or sub-sectors. Promoting the creative sector will also assist in attracting inward investment into the TGL region.

<table>
<thead>
<tr>
<th><strong>TARGET</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Promote the TGL creative sector, change perceptions and put East London on the map as a centre of creativity and innovation that contributes to London’s growth and wealth and attracts inward investment into the TGL region.</td>
</tr>
</tbody>
</table>

Access to venture and investment capital remains a significant issue for the sector. Thames Gateway London Partnership should take the lead in addressing the difficulty the sector faces in accessing venture and investment capital by working with the LDA and co-ordinating the political
support required to promote investment from Local Government, LA and ACE in Thames Gateway London Partnership area artists, creative communities and cultural infrastructure.

TARGET
Maximise investment in the creative industries through public and private sector finance and take a lead in London in testing and driving forward the delivery of new financial instruments to support culture and creativity.

3.2.3 Networks and people
In a situation where geography and industry structure tend towards a fragmented and individualised series of subsectors, freelancers, micro-businesses, start-ups and SMEs place a high value on networks for information, opportunity development, and for assistance with the growth of market-oriented relationships.

There are positive examples of this from Brighton and the South East, where the investment by public funders in Wired Sussex has led to an exemplary series of resources and events which support a growing community of 400+ media companies and practitioners. These are promoted on a virtual and content rich "yellow pages"; and enjoy access to regional, national and international marketing development assistance and technology advice. Alongside this, SEEDA funded an industry leader to act as the South East Media broker, developing networks, and setting up production and other opportunities.

The role of the broker is also demonstrated in the development history of Excel and the Stratford Passenger Terminal. In both cases persistent lobbying and promotion by public sector bodies - in the case of Stratford over a long period of time and seeking to influence East London, regional, national and international decision makers - have successfully secured significant investment from private/public sources.

Small groups of sector specialist support providers offer a crucial service to creative businesses. It is notable that in the City Fringe, where creative clusters are very dense, they are supported by a group of specialist organisations. These include Mazorca, the Lux Centre, Video Electronic Training, Metro New Media, Bibliotech, Space Studios, Acme, Circus Space, East London Film Fund, Four Corners, Team Pictures, Black Filmmakers and CIDA. All of these work closely with creative micro businesses and SMEs and the self-employed. At earlier stages of development are the work initiated by UEL in developing networks and co-production activity in the film and television sector; the dance networking work of Greenwich Dance Agency and East London Dance and Chisenhale; and the embryonic new media network now hosted by East London Chamber of Commerce.

As the creative industries establish themselves in greater numbers further east into TGL it will be important to ensure that more specialist players of this sort establish themselves to provide the specialist support so beneficial to the sector. It will also be important to address the lack of Black and Asian creative business leadership across TGL and to ensure the development of appropriate business support structures to encourage the development of more business that reflect the diversity of TGL.

Co-ordinating the planning and development of the Creative Industries Strategy across all Thames Gateway Local Authorities and agencies will be an important task and will require...
specialist and dedicated time and resources. This must include developing political support within the region and across London and ensuring the most effective allocation from European and other resources and helping to build partnerships to deliver physical and virtual infrastructure. Maximising the role of individual agencies, "networking the networks" and forums and providing co-ordination and linkages between local, TGL region, London-wide and international spheres of policy making and research, sector development and market opportunity will be central to the success of the strategy.

**NETWORKS AND PEOPLE TARGETS**

In order to drive forward the Creative Industries Strategy, to build on the economic contribution of the sector to the TGL region focussed development time and expertise is required. This will also offer greater co-ordination of, within and across borough boundaries and into NTOs and other key agencies and provide a vital link between exiting and emerging local agencies and the wider regional agencies and networks.

<table>
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<tr>
<th>TARGET</th>
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<tr>
<td>Support the development of an independent East London Creative Industry Development Agency by April 1st 2002</td>
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The structure of the creative sector, the growth of the sector driven by convergence and the economic advantage of developing business synergies indicates the need for sustaining and developing the role of specialist sub-sector intermediaries and brokers to work across the region. This is especially important as the sector thrives on “soft” linkages – networks, contacts and business ties and is built upon highly specific creative practice.

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<th>TARGET</th>
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<tbody>
<tr>
<td>A network of sub-sector specialist brokers to support the development of key creative industry sub-sectors in the region.</td>
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Specialist support and development agencies have a crucial role to play in support of the creative and cultural sector of the economy. As the creative industries establish themselves in greater numbers further east into TGL it will be important to ensure that more specialist players of this sort establish themselves to provide the specialist support so beneficial to the sector.

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<th>TARGET</th>
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<tbody>
<tr>
<td>Provide support to attract and develop specialist support agencies and businesses across TGL focussing on areas of immediate growth potential.</td>
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</table>

The network is increasingly regarded as the organisational model most suited to the fragmented creative industries sector and “soft skills” – contacts, networks, connections – are of central importance to how the sector does business. Whilst face to face networking is regarded as the most essential part of doing business virtual networks can also play an important role in joining up the sector, as evidenced by Newham Online; and promoting its products –Mazorca / Hidden Art; or making visible training opportunities– “art-east”.

<table>
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<th>TARGET</th>
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<tbody>
<tr>
<td>Build a network of creative industry agencies, networks and forums as a key agent of support, development, business synergy and growth in the creative industry sector and with the capacity to link and promote the</td>
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</table>
creative sector within the region and across London-wide, national and international markets.

Creativity adds value to processes, goods and services across business and industrial sectors of the economy. Seeking to develop synergies between Creative Industries and the wider business and industrial base in the region should form an essential component of planning for the new economy.

**TARGET**

Develop and implement a strategy designed to maximise opportunities for the regions creative sector to make a real contribution to the development of knowledge, creativity and “added value” across the regions business and manufacturing sectors.

### 3.2.4 Foresight, Innovation and Knowledge

A core objective of any long-term strategy to maximise economic and social advantage to the region through creative industry support will be to give all schoolchildren access to creative and ICT skills. Investment now in a creative and technology based education will reap long-term benefits for the region’s ability to attract inward investment and to sustain and develop opportunities in the fastest growing sectors of the economy – those based on knowledge, creativity and innovation.

Whilst this sector has particularly high levels of degree-level education, it is also has the flexibility to attract people of talent and ambition without traditional qualifications and offers a way out of exclusion for many of the region’s communities. The creation of the new Learning and Skills Councils, changes to Vocational Qualifications and National Training Organisations and the move towards specialism in secondary and further education indicate a critical moment for re-thinking the framework needed to support creative skills development and training.

LELSC has commissioned a detailed study into the skills needs of the creative industries in TGL. This study is complementary to the TGL Creative Industries Strategy and taken together will provide the partners and agencies involved guidance to develop appropriate training services to this sector. Particular emphasis will need to be placed on developing training and ladders of opportunity for TGL’s Black and Asian communities to develop the skills and the contacts to access jobs in the creative sector or to develop and grow their own businesses.

The sub-region’s Higher Education Institutions play a critical role in training the next generation of creative innovators and in this Goldsmiths has a world-class status. However HEIs need to train people to be creative entrepreneurs as well as creative innovators if they are to develop successful and sustainable businesses in the creative sector.

At present the western fringe of the Thames Gateway London region is home to a significant community of micro creative enterprises many of which are working at the cutting edge of innovation in their field. Thames Gateway London Partnership will need to work with partners to develop programmes to retain graduates and growing businesses in the region and encourage individuals of talent to locate to the region. It should seek to build on effective links between creative industries incubator facilities and technology innovations centres and exploit the region’s knowledge resources – its HEIs and FEIs, libraries, museums and archives - creating a virtual accessible knowledge network for the region.
It is a cause of common concern across the industry that both within industry sub-sectors and notably at a sub-regional level and below it is difficult either to extrapolate to the local from the national or to develop a clear local assessment of the size and economic importance of the sector. Many of the research needs of the sector in the region will be shared across London. TGLP should seek to “test” propositions applicable across London by building a firm relationship with the LDA and playing a key role in developing and delivering the Mayor’s Cultural Strategy. London has its own specific research needs which must be addressed through the delivery of a Creative Industries Research programme. Priorities for research include mapping Black, Asian and other ethnic minority creative business and establishing their specific business development and leadership needs; further detailed analysis of industry sub-sectors; further detailed analysis of the potential for significant cluster development especially in the Stratford / Arc of Opportunity zones.

**FORESIGHT, INNOVATION AND KNOWLEDGE TARGETS**

*Investing in a creative and cultural education for all TGL children and young people, in the development of appropriate ICT skills and in creative degree courses with a strong business component is essential. Building LELSC’s research into training and skills needs in the sector and on links between LELSC, training providers and F&HEIs and the creative sector will build routes into the sector for people from excluded communities and without the traditional higher skills so often reflected in the industry’s workforce. This long-term investment will ensure that TGL can provide the creative entrepreneurs and consumers of tomorrow and the skills base to attract inward investment and jobs in the knowledge based industries.*

**TARGET**

Promote a long – term vision that enables every child in the region to have access to a creative and cultural education backed up with the digital skills essential to employment in this and other sectors.

**TARGET**

Put in place a Creative Skills Partnership to drive forward the complex training issues for the sector in the region.

**TARGET**

Build effective links between training providers, F&HEIs and the creative industries to ensure that current practice and business needs are fully reflected in their training and that post-graduation support encourages students to develop their practice and their business in the TGL region.

*The creative industries thrive on experimentation and exploration, their market demands excellence in an increasingly global economy. Creativity and innovation are increasingly understood as the foundations of success in the economy as a whole and the region will need to ensure that it supports opportunities for individual, company and HEI based innovation and development.*

**TARGET**

DPA
A region that encourages, supports and promotes creativity and Innovation with a range of innovation support products that attract and retain creative innovators in the region.

The creative industries sector suffers from a lack of systematic research and data collection both within sub-sectors and across the sector as a whole. There is a need for additional research into individual sub-sectors and the overall economy of the sector in the region. There is a significant gap in foresight activity which limits the capacity of the sector to respond to technological or infrastructural change and the capacity of public sector authorities to understand and properly support the sector.

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<th>TARGET</th>
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<tbody>
<tr>
<td>To put in place a programme of research that sets out to strengthen the creative industries and support planning for their future in the region.</td>
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4. Taking the Strategy Forward: a platform for developing the creative industries in East London

4.1 A Development Platform

The focus for this section of the Creative and Cultural Industry Strategy is to recommend practical ways in which TGLP and those with whom it works most closely can:

- Take forward a programme of actions, which will increase opportunities for the development of sustainable and dynamic creative businesses.
- Advocate the interests of Thames Gateway's creative sector in London, nationally and internationally.

The strategy proposes that TGLP sponsors the development of an independent Creative Industries Development Agency for the region to take forward the implementation and further development of the strategy. The strategy does not seek to advise TGLP's partners - whether local authorities, universities, development agencies, partnerships or the private sector - on the appropriate structures for the development of the overall creative sector in TGL.

The development of the creative economy in TGL will require a wide-ranging series of partnerships and collaborative actions between public and private sector bodies. This strategy proposes that TGLP take an initial series of steps which will allow:

- The development of an independent creative industries development agency.
- The growth of networking and intermediary functions located close to the creative industries.
- Partnership arrangements for practical programmes which fall across organisational boundaries.

4.2 Review of current position

4.2.1 Thames Gateway London Partnership

TGLP has promoted the development of the creative industries by:

- Setting up the Creative and Cultural Industries Task Group.
- Supporting the strategy review.
- Incorporating the creative sector as one of the sectoral priorities for economic development in the region.
- Promoting the interests of the creative industries in TGL in a London-wide setting, for example with the LDA in the context of Cluster Fund bids.

However, dedicated officer time and budgets are minimal and TGLP is handling a very large portfolio on limited means. Notwithstanding this, TGLP recognises that the importance of creative skills and markets in the development of a new economy within TGL will mean allocating resources to target a practical programme of interventions, appropriate to its role as a subregional planning and resource allocations agency. It is therefore proposed that TGLP take the strategic lead in the development of the Creative and Cultural Industries strategy.
In proposing a limited but effective role for TGLP itself, the Partnership might seek to prioritise
bids for resources which would enable:

• Partner agencies to adopt TGL Creative and Cultural Industry priorities at the top and
  in an integrated way.
• The development of a leadership agency for creative industry development in TGL.
• Support for networking and intermediary functions to support and develop sub-sector
growth.
• The development and strengthening of partnership arrangements in TGL to underpin
implementation of the strategy.

4.2.2 TGLP Creative and Cultural Industries Task Group

TGLP has convened one of its task and time-defined groups to advise it on the development
of a strategic approach to supporting this sector of the economy. Its current terms of
reference include:

• To establish a TGLP Creative and Cultural Industries Strategy.
• To co-ordinate bids and local initiatives to support the creative industries in TGL.
• To compile and disseminate information and research to inform strategy, advocacy
  and bids.
• To organise advocacy events and activities to promote an understanding of the
  importance and potential of the sector, and to support creative businesses.
• To focus on: networking; infrastructure development; skills development; business
  support; marketing and inward investment.

Currently the Task Group is a non-executive group, whose membership has been
established by invitation from TGLP and informally by the group itself. The Group reports to
TGLP through its chair. Its members include:

• Local authorities
• Universities and HEIs
• Networkers and intermediaries

Its terms of reference range from advice to TGLP over the matter of the strategy, through
increasing knowledge of and the profile of the creative sector both amongst its own members
and a wider political and professional audience, to the executive and practical aspirations of
co-ordinating bids and local initiatives. Its executive capacity is limited both because its
primary role is as an advisory body to TGLP, and by the modest resources which TGLP and
its members are able presently to devote to it.

The strategy proposes that the valuable role in networking and providing a forum for
discussion and information sharing should be strengthened. The Task Group should
therefore be stood down and replaced with a more broadly based creative industries forum
for TGL with increased practitioner and creative business engagement.
4.3 Development options for creative industry support.

In considering the most pragmatic way forward for TGLP, and mindful of the real resource constraints which are confronting the organisation, the following issues are proposed as the determining factors for developing an organisational platform for the next period of strategy development:

- The implementation of this strategy will focus on getting TGLP's industry based and public sector partners to work in a concerted way to secure the full contribution of the creative sector to the economic and social regeneration of Thames Gateway.
- Structures should be determined by agreed purposes defined through strategy recommendations rather than by the aspirations of or constraints upon particular organisations.
- TGLP should confirm the importance of developing and engaging creative business leadership and in working with intermediary organisations and creative industry agencies.
- In general it is better to add value and increase strategic capability than to spread existing support and expertise more thinly, or divert resources from current projects and programmes.

In this context, the recommendations which follow are premised on the following principles:

- The significance of the sector, and the implementation of the strategy require TGLP to take the strategic leadership role in owning and driving forward the development and implementation of the Creative Industries Strategy.
- TGLP’s role should be supportive: advocacy, seeking investment and resources (working with and through the TGLP inward investment agency), prioritising funding. Sector developmental activity should sit firmly with TGLP's industry based, local or regional partners.
- TGLP should access a wide base of advice and guidance in the implementation of the strategy and in further developing the creative economy.
- The leadership and developmental roles for the creative industries as a whole, and for particular subsectors and market segments - including networking, sharing information, project and sector development within TGL- should be supported on an independent and industry led basis wherever possible.

4.4 TGLP Creative and Cultural Industries Advisory Forum

It is proposed that TGLP establishes and supports the development of a programme for a broadly based creative industry advisory forum, which should:

- Have significant industry/sector/practitioner representation.
- Have significant specialist creative and cultural industry development agency and intermediary organisation representation.
- Encourage all local authorities to be represented, in their economic and/or regeneration as well as their cultural/arts functions.
- Include Further and Higher Education Institutions.
- Include representatives of major institutions and agencies including the Learning and Skills Councils, Business Links, Business Advisory Service, Chambers of Commerce, Business Partnerships etc.
- Include representatives from London wide bodies; regional and national sector support bodies.
It is proposed that this
• Meets less frequently (3 or 4 times per annum).
• Offers its members regular email updates on Creative and Cultural Industries issues, opportunities, research and the progress of strategy implementation.
• Is lightly serviced by TGLP in the first instance and by the Agency in the medium term.
• Develops a programme of review and scrutiny of the development of the creative economy in TGL.
• Acts consciously as a formative influence for networking and advocacy in the sector in TGL.
• Acts as a focus for information exchange across the creative and cultural industries sector and between the sector, agencies and institutions.

4.5 Sector support and leadership

The Creative Industries sector is an aggregation of a complex collection of industrial and creative sectors each of which have their own professional, technical, skills and infrastructure base and their own needs in terms of business and content development. For this reason a key strand of the strategy is the implementation of sector specific development strategies. The strategy proposes that sub-sector development focuses on a small number of industry sectors in the first instance. These sectors have been identified for the following reasons:
• Sectors where there is already a level of activity which can be built upon and strengthened.
• Sectors where development and / or networking agencies already exist in a part of or across the region for example Design and Film and Video
• Sectors where networking, research activities and early stage development activities are planned or have been started for example Digital Media.
• Sectors where there is a particular TGL strength, acknowledged more widely across London, for example Dance and Visual Arts.
• Sectors with particular and pressing property and infrastructure needs which arise from the expansion of the City eastwards into the City Fringe for example Design and Visual Arts.

For these reasons the strategy proposes the following sectors are identified for focussed development in the first stage:
• **Design**: building on the designer maker initiatives currently in hand through Mazorca and extending these into other design subsectors, with appropriate specialist advice.
• **Film and Video, TV, radio, broadcasting** and related businesses, to extend the work carried out in Hackney and Newham by James Little; and to extend the East London initiatives of LFVDA and the new Film and Media Network in Tower Hamlets.
• **Digital Media**: to develop the initial work undertaken by the East London Chamber of Commerce, particularly to identify individual practitioners and companies working in moving image and graphic design
• **Visual Arts**: to bring together and extend the good practice which exists through existing exemplary projects, studio and artists’ networks, to maximise the impact of initiatives such as AMCE’s study of the Visual Arts Sector in East London and to address the urgent implications of major studio closures.
• **Dance**: building on the excellent work undertaken by the regions two Dance Agencies – East London Dance and Greenwich Dance Agency, the networks and
services at Chisenhale and the major opportunities presented by the redevelopment of the Laban Centre.

A costed programme of support is being developed which will propose:
- The recruitment of industry based specialist (full or part-time) brokers to work across TGL to identify and respond to the pressing market development, networking, infrastructure and other needs of the sector.
- Opportunities for practitioners and businesses to come together to develop common approaches to market development and similar matters.
- Further support for networking and intermediary bodies.
- Research and modelling to develop sustainable options for workspace in the face of increasing property pressures.

4.6 Developing support for other sub-sectors over time

Over time and as resources become available and methodology is developed it is envisaged that a full range of sub-sectors in the Visual and Design and Media and Performing sectors of the industry would benefit from focussed development and support.

Further research is required to understand the established and growing Music economy in TGL for example. The region’s Theatre and Performing Arts sectors are experiencing significant growth with additional funding for the Queen’s theatre, Hornchurch, the development of the Rich Mix Centre and the new Laban centre and the recent opening of Stratford Circus and Ocean. Clearly in this predominantly subsidised part of TGL’s cultural economy sub-sector support may require a different focus than that provided in the mainly commercial Film and Design Sectors.

Long-term industry development and support will of necessity require significant investment of time and investment and will needs be developed and delivered over time.

4.7 East London Creative Industry Development Agency

In addition to a sector-by-sector approach, the strategy proposes that Thames Gateway London Partnership takes a leading role in sponsoring the development of an East London Creative Industry Development Agency. The Agency would be driven and bounded by tasks and timescale, and not by its own long-term existence.

Characteristics:
- Independent (by April 1st 2002).
- Multi funded via contracts for services from a range of local, sub-regional, pan-London, National and international sources.
- Project (research, development, advocacy) based and flexible.
- Small, and accountable to funders and industry leadership groups.
- Conceived in the first instance as a fixed term project (say 5 years).

Roles:
The Agency would develop the capability to undertake the following roles:
- Support existing networks and agencies and provide a link between local, sub – regional and pan-London and international initiatives.
• Develop the research and information base for East London creative industries
• Develop the networking capability and sector support in other subsectors (e.g. music, performing arts).
• Help develop and support specialist sub-sector brokers.
• Act as a focal point for advocacy, promotion and support of the creative sector in Thames gateway.
• Working with and through the TGLP inward investment agency, to act as a champion for funding and other investment which benefits the creative sector.
• Support, manage and monitor programmes funded by Thames Gateway London Partnership.
• Inform the planning framework of TGLP.
• Develop partnership arrangements with other bodies.
• Disseminate information, and consolidate information networks to do this.
• Commission further work in developing the strategy.
• Support the proposed Thames Gateway London Partnership Creative Industry Advisory Forum.

Developing the Agency:
The strategy proposes that TGLP
• Acts as the sponsor and lead partner in the development phase of the Agency commencing September 2001.
• Convenes a small non executive steering group comprising representatives of key creative industry and economic / training / business support agencies to act as a shadow board
• Identifies and as appropriate applies for funding from a range of sub-regional, pan London and European Sources to ensure that the Agency can be established and sustainable as soon as possible and with a target of April 2002.

In this development phase the Agency will be a project of Thames Gateway London Partnership. As soon as secure foundations have been secured the Agency will be established as an independent legal body, the shadow board evolving into the full Board for the new organisation.

Once the Agency is established as an independent organisation Thames Gateway London Partnership will continue the role as the Agency’s sponsor and will be its lead strategic partner.

4.8 Developing the Strategy : A phase 1 Action Programme September 2001 to April 2003

In order to drive forward the strategy and put in place the proposed core delivery structures an 18 month action programme is set out below. This initial programme focuses on the core developmental activities, investment and partnerships which must be secured if the longer term targets set out in section 3 are to be met.

Phase 1 Target: 2001 -2003

In order to drive forward the Creative Industries Strategy, to build on the economic contribution of the sector to the TGL region focussed development time and expertise is required. This will also offer greater co-ordination of, within and across borough boundaries
and into NTOs and other key agencies and provide a vital link between exiting and emerging local agencies and the wider regional agencies and networks.

**TARGET**
Support the development of an independent East London Creative Industry Development Agency by April 1st 2002

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**Key Achievements at April 2003**

**Building A Network**

Build a network of creative industry agencies, networks and forums as a key agent of support, development, business synergy and growth in the creative industries in TGL with the capacity to link and promote the creative sector within the region and across London-wide, national and international markets. Key partners will include:

- CIDA
- Mazorca
- East London and Greenwich Dance Agencies
- Chisenhale Dance Space
- ACME and SPACE studios
- Talent East
- Three Mills Island Studios
- Art-east
- Ts2K
- Vision in Art
- LFVDA
- Local authorities with active developmental programmes in place to develop the creative industries sector including Newham, Lewisham, Tower Hamlets, Hackney, and Greenwich.

**Specialist Brokers**

Develop the investment framework and industry support for a network of sub-sector specialist brokers commencing no later than April 2003. The structure of the creative sector, the growth potential in the hybridisation of culture and the economic advantage of developing synergies within and between sub-sectors and the specific practice based nature of much work in the sector indicates the need for sustaining and developing the role of specialist sub-sector intermediaries and brokers to work across the region.

In the first phase specialist brokers will be sought to support the development of the following key creative industry sub-sectors

- Film and Video and Broadcast media
- Digital Media
- Design
- Visual Arts
- Dance

**Research and Foresight**

Put in place and action a programme of research that sets out to strengthen the creative industries and support planning for their future in the region with the following priorities:
• “Testing” propositions applicable across London by building a firm relationship with the LDA and playing a key role in developing and delivering the Mayor’s Cultural Strategy.
• Mapping the development and support needs of ethnic minority creative businesses.
• To assess in more depth the economy of the sector as a whole and every sub-sector in the TGL region.
• Detailed assessment of the structure, significance and long term planning needs of the creative industries in the City fringe areas of Hoxton, Shoreditch, Spitalfields, Whitechapel.
• Detailed assessment of the structure, significance, development and infrastructure needs of the creative industries in Stratford, Deptford and Greenwich.
• To develop models to ensure a supply of quality, affordable and secure workspace for the creative industries in key central locations and creative clusters in order to retain and attract creative talent in the region.
• Building expertise and resources and developing models for the support / incubation of talent and for opportunity brokering.

Co-ordinating investment and development plans
Developing a co-ordinated approach to region wide planning for investment and development in the Creative and Cultural Industries from a range of funding sources to include:
- Objective 2
- LELSC
- Neighbourhood Renewal
- LDA
- Skillwork
- London Arts

Developing Industry Specific Business Services
Put in place the partnerships with key agencies including Business Link for London, the Business Advisory Service, LELSC and key training agencies to pioneer the delivery of flexible and sector specific business advice services to the creative industries in the region which reflect the realities of trading in the new, creative economy by working with:
- LELSC
- Business Link for London
- Business Advisory Service
- Local Authority Partners
- LDA
- London Arts
- Creative Industry networks and agencies

Developing the Virtual Infrastructure
Catalysing and building partnerships with a view to providing sufficient access to bandwidth for the region’s creative industries which will be a significant factor in attracting inward investment and relocation and in preventing migration out of the region for many parts of this sector group including Publishing, Design, Film, Video, Digital Media and Software development working with
- The region’s Higher Education Institutions
- Invest in Thames Gateway London
- Private sector partners
New Financial Mechanisms to Support Creative Businesses
Develop the partnerships that can deliver new investment in the creative industries through public and private sector finance and take a lead in London in testing and driving forward the delivery of new financial instruments to support culture and creativity.

Working with the LDA and GLA to develop new financial instruments – especially those which reflect the hybrid, public / private economic mix of large parts of the sector

Building Political Support
Co-ordinate the political support required to promote investment from Local Government, LA and ACE in TGLP’s artists, creative communities and cultural infrastructure by working with:
- Thames Gateway London Partnership
- Local Authorities
- GLA and the GLA “family” including Cultural Strategy Group, LDA (economic development) and LDA (Spatial development)
- London Arts

Advocacy and Promotion
Advocate, support and promote the creative industries within TGL, across London and nationally and internationally.

Building relationships with a range of partners including:
- Political Leadership in TGLP’s partner local Authorities.
- Creative Industry Leadership in TGL.
- The Inward Investment Agency.
- The LDA, CSG and London Arts.
- Arts + Business.
- London First.
- London Business Links.
- London Tourist Board.
- DCMS / Creative Industries Task Force.
- The British Council.

Key Actions to Meet Target
Commencing September 2001, Thames Gateway London Partnership will
- Act as the sponsor and lead partner in the development phase of the creative industries development agency.
- Convene a small non-executive steering group comprising representatives of key creative industry and economic / training / business support agencies to act as a shadow board for the agency.
- Solicit support in the development stage of implementing the strategy, establishing the agency and rolling out the strategy.
- Identify and as appropriate apply for funding from a range of sub-regional, pan London and European Sources to ensure that the agency can be established and sustainable as soon as possible and with a target of April 2002.
- Put in place a Thames Gateway London Partnership Creative Industries Advisory Forum.
Commencing April 2002 Thames Gateway London Partnership will

- Work with the shadow Board to identify when the agency is fit to move towards independent status.
- Establish the agency as an independent organisation as soon as its sustainability is assured.
- Establish the Shadow Board for the new organisation.
- Continue to act as the agency’s main sponsor and its lead strategic partner.
TGLP SUB-SECTOR MAPPING
Report on Data Search in Dance, Visual Arts, Design and Film/Video/TV Sectors

A simple database has been set up for the purposes of the TGLP audit, which has enabled the analysis in the tables below, except where indicated in the text. The information entered into this database is as follows:

- Name
- Borough
- Postcode
- Area (Dance; Design; Film/Video/TV; Visual Arts)
- Category of Contact (different for each of the above areas)
- Artist Studios: number of artists (Visual Arts only)
- Source of information

1 DANCE

1.1 Data has been drawn from the following sources:
- The Place Dance Services databases
- Arts Council of England Dance Green List (dance artists and companies)
- Arts Council of England Dance Yellow List (regional arts boards, national dance agencies and other organisations, dance consultants/managers)
- Local sources: Tower Hamlets Arts Directory; Lewisham CCI Database; Greenwich Arts Database; Havering, Thurrock and Newham Business Directories
- Yellow Pages/Yell.Com (searches on Dancewear; Dancing Schools)
- Input and advice from Greenwich Dance Agency

1.2 The Place Dance Services has a Database of 7,700 members (includes national and international members); the membership is judged to be quite representative due to the service provided; there is also a Space Directory of 300-400 rehearsal spaces in Greater London, and a Dance Managers database. The Place Dance Services has carried out postcode searches for contacts in the TGLP region and this has provided the key element of this audit.
1.3 Borough-breakdown of Dance Sector results:

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Notes to table:
- Individual practitioners: The figure given is that provided by The Place Dance Services. No attempt has been made to build figures for individuals beyond this, since data is not available to create a comprehensive, and therefore meaningful listing.
- Development Agencies: A number of the organisations included in this category (Greenwich Dance Agency, East London Dance, Chisenhale Dance and to an extent the Laban Centre) cross over various categories, including provision of education and training, venue for performance/rehearsal, producing and commissioning work, in addition to their developmental and strategic work.

1.4 TGLP/London Comparisons:

TGLP percentages of London-wide figures from The Place Dance Services databases are as follows:
- c.64% Individual Dancers (London total: 495)
- c.19% Organisations/companies/publications (London total: 232)
- c.36% Venues and promoters (London total: 39)
- c.7.5% Rehearsal spaces on Space Directory (London total: 456)

1.5 Key issues for dance identified by Greenwich Dance Agency:

- Poor infrastructure to support professional dancers and poor facilities, though TGLP region may be better served than west of London; Lottery funding has tended to be granted for education and training rather than working facilities.
- Lack of marketing mechanisms, programming budgets etc. as compared with central London venues means that development of dance in the region faces an uphill struggle; transport improvements ironically may facilitate local audiences to visit central London as much as enabling audiences to come to events outside the centre.
- Understanding of role of development agencies is hard to get across, particularly without adequate support, since they are a relatively new concept. However, there appears to be increasing appetite for dance activities, e.g. after-school clubs (assisted by New Opportunities Funding)
- Although the presentation of alternative, site-specific projects has taken place in the region and proved successful in bringing in new and diverse audiences, such activities are costly in money and time to present, and resources are lacking
- Given the concentration of dance activity in the TGLP region, there is a great opportunity for new and strategic work to be done, and this opportunity should not be lost.
2

VISUAL ARTS

2.1 Data has been drawn from the following sources:

- London Arts: Visual Arts List of Studios
- New Exhibitions of Contemporary Art
- Local sources: Tower Hamlets Arts Directory; Lewisham CCI Database; Greenwich Arts Database; Havering, Thurrock and Newham Business Directories
- Yellow Pages/Yell.Com (searches on Art & craft equipment and materials; Art & craft shops; Picture framers and Frame-makers; Art Galleries & dealers; Art Galleries – Public; Art publishers and dealers; Arts organisations; Founders and Finishers; Artists’ Agents)
- Input on artist studio figures from Acme, SPACE, APT, and ACAVA.

2.2 It is not possible to provide an accurate figure for individual artists active in the TGLP region or indeed across London. The various artist registers provide only a partial picture, since these are dependent on artists choosing to sign up with them. An estimate from SPACE is that the number of artists in East London is up to 2,000; Acme has recently commenced a research project into Artists in East London with National Lottery funding. Figures have been given for artists occupying studio complexes run by organisations such as SPACE and Acme, which provide a strong indication of the size of the visual artists in East London, predominantly in Tower Hamlets and Hackney. However, the studios listed include some but not all of the smaller, privately-organised studios which are difficult to track.

2.3 Art classes and amateur arts activities have not been included due to the difficulty of providing comprehensive information, largely because there is considerable activity across the region, as there is throughout London, provided by a number of agencies, such as the local authority, voluntary and private sectors.

2.4 Borough-breakdown of Visual Arts results:

Error! Not a valid link.

Notes to table:

- Artists Studios: It should be noted that Carpenters Road Studio in Newham is closing on 24/06/01 and Cable Street Studios in Tower Hamlets may also be lost. However, Acme estimate that artists from these studios are likely to remain in the East London area, with 50% likely to be accommodated in other studios. It should also be noted that a number of SPACE studios in Hackney may close within the next year or two, due to expiry of short-term leases.
- Development organisation: category includes Art Associations with local, regional and national remits (e.g. National Artists Association, Acme, Art Services Grants (SPACE), InIVA, AAVAA, Vision in Art)
- Exhibition spaces: The number of galleries/exhibition spaces fluctuates, with spaces sometimes used on a temporary or 1-off basis.
- Artists resource: this category includes such facilities as foundries, picture libraries, darkrooms
2.5 **Key issues for Visual Arts identified by Studio organisations included:**

- lack of a central register for studio accommodation in London
- difficulty of finding suitable buildings for new studio spaces
- rising property prices, and suitable buildings less easy to access now
- increasingly difficult for artists to negotiate for studio premises privately

3 **DESIGN**

3.1 Data has been drawn from the following sources:

- Mazorka database of Designer/Makers
- Crafts Council National Register of Makers
- Local sources: Lewisham CCI Database; Greenwich Arts Database; Havering, Thurrock and Newham Business Directories
- Yellow Pages/Yell.Com (searches on Designers – Graphic & Advertising; Design Consultants; CAD Design services; Designers - Product; Exhibition Designers; Display Artists and Designers; Printers and lithographers)

3.2 Mazorka Projects completed its comprehensive audit of designer/makers in May 2001, resulting in a database of c.1,500 contacts across 11 boroughs. This does not replicate the TGLP region and the following boroughs were excluded: LB Lewisham; LB Redbridge; Dartford; Thurrock. In order to get a sense of activity in Redbridge, Thurrock and Dartford, information was sourced from the Crafts Council National Register of Makers, although it must be borne in mind that this is a selected register. Lewisham’s 1998/9 CCI database created for the ‘Mapping the Cultural and Creative Sector in Lewisham’ report by Clare Cooper has provided the figures for designer/makers in Lewisham.

3.3 Other design categories, such as Graphic designers, were not included on Mazorca’s database, and information has been taken largely from Yellow Pages listings. Mazorca is currently setting up a regional supply network in order to access manufacturers relevant to the design sector, including looking at transferable skills (for example those in the car component industry in Dagenham).

3.4 **Borough-breakdown of Design Sector results:**

**Notes to table:**

- Designer/Maker: numbers are provided by Mazorca’s recent audit, and includes designers in the following media: furniture, jewellery, architectural and stained glass, ceramics, fashion and fashion accessories, textiles, lighting.
3.5 TGLP/London Comparisons:

Although it is not possible to assess the percentage of designer/makers active in the TGLP region against London as a whole, since no other body has compiled a comparable comprehensive list, Mazorka estimate that there is a large proportion in the East London area, with other clusters of activity in Greenwich and Lewisham.

4 FILM/TV/VIDEO

4.1 Data has been drawn from the following sources:
- The London Film Commission
- East London Creative Directory
- Local sources: Tower Hamlets Arts Directory; Lewisham CCI Database; Greenwich Arts Database; Havering, Thurrock and Newham Business Directories
- Yellow Pages (searches on TV, Film and Video Production Services; Cinemas; Broadcasting Services)

4.2 The London Film Commission holds three databases covering c.15,000 Crew, c.8,000 Companies and c.12,000 Locations. The LFC has provided figures from these databases having carried out a postcode search for contacts in the TGLP region under a number of categories. This information forms the basis of the table below.

4.3 Data gained from other sources has not been included in the analysis, since it is not felt this provides a sufficiently comprehensive audit across the TGLP region. The East London Creative Directory, for example, is in progress and to date covers areas of Tower Hamlets, Newham, Hackney and Waltham Forest. While companies or individuals additional to those on the LFC database have been found, it is felt that the LFC data gives a good sense of the sector.

4.4 Borough-breakdown of London Film Commission results:

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Notes to the table:
- Agents & Diary Services: includes talent agencies, casting services as well as estate and location agencies.
- Crew: LFC have a further 4,000 crew London-wide registered with agents which are not included here
- Total Facilities: this figure covers all services, including those not directly or exclusively connected to the industry – e.g. accountancy, legal, catering, translation services, recruitment, courier services, car hire, locations.
4.4 TGLP/London Comparisons:

TGLP percentages of London-wide figures from The London Film Commission database are as follows:
- 12.3% Agencies & Services (London total: 673)
- 14.3% Camera & Grip Equipment (London total: 81)
- 16% Education & Training (London total: 56)
- 4.7% Film & TV Companies/organisations (London total: 472)
- 2.1% Lighting and Electrical (London total: 144)
- 5.3% Post Production (London total: 394)
- 7.2% Production Companies (London total: 682)
- 8.2% Production/rehearsal spaces (London total: 183)
- 16.3% Sound and Music (London total: 43)
- 18% Studios (London total: 100)
- 14.9% Crew (London total: 6018)
TGLP Creative and Cultural Industries Report

Data Report and Appendices

David Powell Associates Ltd
for Thames Gateway London Partnership

September 2001
1. The Creative Industries and Creative Industry Sub-Sectors in Thames Gateway London

1.1 Creative Industries Employment and Location

The Creative Industries sector is an aggregation of a complex collection of industrial and creative sectors. Many – although not all – parts of the sector operate in a hybrid economy which crosses the boundaries between public, private and voluntary but the vast majority of companies and organisations are commercial businesses. The sector tends towards fragmentation and diversification and is dominated by freelance sole traders and micro businesses. The network is increasingly emerging as the organisational model most suited to the sector.

Whilst there is considerable convergence of needs across the creative industries in TGL there is also sufficient differentiation between sub-sectors to indicate the need for more in depth sub-sectoral analysis. The Creative Industries sector in Thames Gateway London has therefore been assessed in two identifiable industry sets – Design and Media Industries and Media and Live Industries – where there are clear natural connections between sub-sectors within the sets which include their skills base and infrastructure. As well as assessing the structure and pressing issues facing businesses in these two industry sets, case studies looking at the structure and needs of specific industry sub-sectors – Film and Broadcasting, Dance, Design and Visual Arts - provide additional insight into the sector in the TGL region. Further summary analysis of every industry sub-sector follows there after.

It should be noted that the two industry sets discussed below – Design and Visual and Media and Live are not discreet and detached the one from the other. Indeed as technological convergence continues and practice develops there is increasing hybridisation across traditional arts and media sectors and old boundaries of discipline are fast disappearing.

DPA commissioned the GLA Research and Information department to undertake an analysis of the most recent (1999) NOMIS data and to assess this against data from 1995. This enables us to assess the relative strengths of each sub-sector and the industry as a whole over time and compared with both Great Britain as a whole and with the rest of London.

It should be stressed that this data does not fully reflect employment in the creative industries as it does not account for high percentages of sole traders or those with multiple or duel occupations. It will however offer a baseline assessment of the relative strength of sub-sectors and the industry as a whole from an employment perspective compared especially with the rest of London.

Finally it should be noted that detailed analysis of any industry sub sector is a large and complex task made more difficult as a result of the fragmented nature of employment in the creative industries. The London Film and Video Development Agency, for example, has proposals to develop a detailed study of the Film and Video sector in the region and expects this to cost significant sums of money and to take 2 years to complete.
1.2 Creative Industries Employment and employment growth

Table 1
Creative Industries Employment in Thames Gateway London

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1,360,999</td>
<td>342,559</td>
<td>61,308</td>
<td>18%</td>
<td>1,538,130</td>
<td>414,596</td>
<td>72,761</td>
<td>17.5%</td>
</tr>
</tbody>
</table>

Figures are based on:
1995 Annual Business Enquiry realigned for comparison
1999 The Annual Employment Survey
These employment surveys do not include self-employed. They are workplace based so they count all those working in that area no matter where they live.
National figures are for Great Britain and not the United Kingdom

Analysis is based upon those SIC Codes relevant to this study and to the industry definition set out in section one of the main report. They include Book and Newspaper Retail but not Clothing, Textile or Leather goods retail/wholesale. Retail figures for Music and Video have not been available. Library and Archive and Other Entertainment Activity employment have been counted within the Performing and Literary Category, but Museum, Fair and Amusement Park sporting and recreational employment have been discounted. Telecommunications and Maintenance and Repair of Office Machinery have also been discounted.

As analysis is based upon the definition of the CCI sector in the TGLP region it should be noted that direct comparisons with other available data is difficult. The most recent report assessing the creative economy across London for example includes employment data for sport and recreation and Museums and Heritage but discounts engineering activities within the Architecture category.

In the period 1995 to 1999 it appears that employment in this sector grew in TGL but that the region’s share of London’s employment in these sectors declined by perhaps less than 0.5% - this margin of change is however insignificant.

The recently published Creative Industries Mapping Document (2001) indicates that the Creative Industries in the UK generates revenues of about £112.5 billion with output growing at 16% in 1997-8 compared with just under 6% for the UK economy as a whole. The Mapping Document indicates that the Creative Industries employ some 1.3million people. Evidence from this assessment of more recent NOMIS figures indicates that this figure has grown significantly. It should however be stressed that the Mapping document draws on a far wider body of evidence to assess employment and indeed revenue figures. It should also be stressed that the employment figures given

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1 See Appendix 2 of this report for details of SIC Codes used for this analysis
2 By doing this we are able to make some sense of the SIC Code 9231 “Artistic and Literary Creation etc”
3 Creative Energy; the creative industries in London’s economy, LDP and GOL, 2000
4 Creative Industries Mapping Document, DCMS, 2001
above do not include any figures for a number of sectors – Designer Fashion, Music (except for Recording Studios) and most significantly Design, for which Creative Industries Mapping Document suggests a UK employment figure of 76,000. This study has gathered evidence of 1,792 Design Companies and individual Designer/Makers based in the TGLP area\(^5\). However it has not been possible to assess total employment across these Design businesses in the TGLP area.

On the basis of the Annual Employment Survey data we can draw the following broad conclusion about employment growth in the Creative Industries in the TGLP area over the four year period 1995 – 1999.

**Table 2 : Employment Growth in Creative Industries 1995 – 1999**

<table>
<thead>
<tr>
<th></th>
<th>Growth in employment 1995 - 1999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain</td>
<td>11.5%</td>
</tr>
<tr>
<td>London</td>
<td>17%</td>
</tr>
<tr>
<td>TGLP</td>
<td>16%</td>
</tr>
</tbody>
</table>

In the period 1995 to 1999 the UK economy and that of the Thames Gateway was in a (still continuing) process of dramatic restructuring. The decline in the traditional manufacturing sector and the growth in the less traditionally structured service sector of the economy allied to technological convergence has led to an increase in self employment and partnership, short term and contract working. These are the dominant features of the creative sector. We can therefore assume that there is significantly more employment in the creative sector in the TGLP region than is reflected in the Annual Employment Survey. However this trend will also be the case across London and Great Britain as a whole.

**1.3 TGLP creative industries employment as compared with total TGLP employment**

**Table 3 : Creative Industries share of total TGLP employment**

<table>
<thead>
<tr>
<th>Employment Sector</th>
<th>Date</th>
<th>Total</th>
<th>CCI Share of TGLP Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative Industries</td>
<td>1995</td>
<td>61,308</td>
<td>9%</td>
</tr>
<tr>
<td>All Employment Sectors</td>
<td>1995</td>
<td>704,008</td>
<td>-</td>
</tr>
<tr>
<td>Creative Industries</td>
<td>1999</td>
<td>72,761</td>
<td>9%</td>
</tr>
<tr>
<td>All Employment Sectors</td>
<td>1999</td>
<td>826,296</td>
<td>-</td>
</tr>
</tbody>
</table>

All Data Annual Business Enquiry (1995) and Annual Employment Survey (1999)/ ONS. The Total Employment Figures are aggregates from which agriculture class 0100 (1992 SIC) has been excluded

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\(^5\) see section 2 and Appendix 1 of this report
1.4 Geographic Spread of Creative Industry employment

The Annual Employment Survey gives us a partial picture of employment in the sector across each borough within the TGLP region. We can break down the available consistent data as follows:

Table 4: Geographic Spread of Employment (Nomis 1999)

<table>
<thead>
<tr>
<th>Borough</th>
<th>% of total TGLP CCI Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barking and Dagenham</td>
<td>2%</td>
</tr>
<tr>
<td>Bexley</td>
<td>4.5%</td>
</tr>
<tr>
<td>City of London</td>
<td>20%</td>
</tr>
<tr>
<td>Dartford</td>
<td>2%</td>
</tr>
<tr>
<td>Greenwich</td>
<td>5%</td>
</tr>
<tr>
<td>Hackney</td>
<td>14%</td>
</tr>
<tr>
<td>Havering</td>
<td>4%</td>
</tr>
<tr>
<td>Lewisham</td>
<td>5%</td>
</tr>
<tr>
<td>Newham</td>
<td>3%</td>
</tr>
<tr>
<td>Redbridge</td>
<td>5%</td>
</tr>
<tr>
<td>Thurrock</td>
<td>1.5%</td>
</tr>
<tr>
<td>Tower Hamlets</td>
<td>29.5%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>5%</td>
</tr>
</tbody>
</table>

This table needs to read with care. Evidence from detailed analysis of the scale and location of four industry sub-sectors – Film and Broadcasting, Dance, Visual Arts and Design - indicate clearly businesses and individuals trading in these sectors not only in the City, Tower Hamlets and Hackney but also with strong clusters of activity variously in Lewisham, Greenwich and Newham. Notwithstanding this the extent to which this data alone reflects the heavy concentration of employment in these sectors in the City of London, Hackney and Tower Hamlets which between them account for 63.5% of total employment identified through the Annual Employment Survey.

To help gain a fuller understanding of the structure, location and scale of each industry sub-sector across the region, the following two sections assess the issues facing industry sub-sectors, their principle clusters and locations in the region and, where possible, their scale and structure.
2. The DESIGN AND VISUAL Industries in Thames Gateway London
The Design and Visual Industry set of the Creative Industry sector is taken to include the following distinct industry sectors:

Advertising
Architecture
Crafts
Design
Designer Fashion
Visual Arts

2.1 Design and Visual Industry Context

Globalisation
- High dependency on success of Global economy and impact of globalisation on development of new markets and increased global competition for those markets.
- Globalisation of taste and homogenisation of products has counter effect of increasing value and desirability of unique or niche market products.

New Technologies and technological convergence
- On-going growth in digital markets and technological convergence: New technologies have scope for significant exploitation bringing a large new income stream to the sub-sector. Growth of digital media and ICT will increase demand for competitive edge via the design of websites and supporting technologies. Maintaining global competitiveness will be linked to exploitation of new technologies and to creative and technical skills to support the industry.
- Failure in parts of sub-sector to exploit marketing opportunities of Internet.

Skills and Talent
- Structural weakness in identifying and nurturing new talent.
- Addressing skills shortages and training key issues for global competitiveness
- Industry structure indicate high numbers of sole traders with significant needs in developing business skills.
- Business skills for graduates and Micro/ SMEs.
- Talent retention in UK.

Foresight
- Fragmented and complex sector with insufficient foresight and analysis functions.
- Lack of market information.

Investment and Collaboration
- Failure to build effective relationships with manufacturers
- Lack of access to finance.

2.2 Design and Visual Employment in TGL
Large parts of this sector are dominated by freelance sole traders and for this reason it is particularly difficult to assess both total employment in the sector, and in specific sub sectors and the total number of companies. This is exacerbated by the particular difficulty presented by existing Standard Industrial Classification (SIC) codes used by the Office of National Statistics (ONS) to capture employment data in the areas of Design and related activity.
Table 5
Total Identified Employment: Design and Visual Sector
(Includes Nomis figures for Advertising, Architecture and Photography and limited data on craft related manufacturing.)

<table>
<thead>
<tr>
<th>Area and Date</th>
<th>Total Employed</th>
<th>% + / - since 1995</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain 1995</td>
<td>478,690</td>
<td>-</td>
</tr>
<tr>
<td>Great Britain 1999</td>
<td>452,699</td>
<td>-5%</td>
</tr>
<tr>
<td>London 1995</td>
<td>95,718</td>
<td>-</td>
</tr>
<tr>
<td>London 1999</td>
<td>102,980</td>
<td>+7%</td>
</tr>
<tr>
<td>TGL Region 1995</td>
<td>14,653</td>
<td>-</td>
</tr>
<tr>
<td>TGL Region 1999</td>
<td>12,398</td>
<td>-17%</td>
</tr>
</tbody>
</table>

The significant reduction in employment in the region over the four-year period is largely due to a significant drop in employment in the Architectural sector. This sector includes engineering activities and we would conclude that the reduction reflects a slow down in major infrastructure and building development on the Isle of Dogs / Canary Wharf over this period.

On the basis of this limited data we can assess the share of Greater London employment in the sector. Whilst the same strictures apply about the limited value of this evidence it does enable us to draw some comparative conclusions about the relative strength of this group of sectors in relation to the whole of London.

Table 6
TGLP Design and Visual Employment compared with London as a whole

| TGLP as % of London total employment in Design and Visual 1995 | 15%+ |
| TGLP as % of London total employment in Design and Visual 1999 | 12% |

2.3 Design and Visual Clusters and Location in TGLP
Almost 60% of Design and Visual employment captured by NOMIS in 1999 is located in Tower Hamlets, Hackney and the City of London.

Advertising and Photography then declines in density of employment moving west to east across the region. Architectural and engineering activities are more evenly spread across the rest of the region but again with density declining towards the eastern-most points of the region.

Evidence from detailed research undertaken into the Design and Visual Arts sectors indicates again very significant clustering of activity in Hackney, the City of London and Tower Hamlets with some developing clustering in Deptford, Lewisham and Greenwich.

2.4 Design and Visual in TGLP: Industry Characteristics
- Dominated by freelance sole traders, micro businesses (employing up to 9 people) and SMEs. Many Makers, Craftspeople and Visual Artists may work part time, have multiple jobs in related areas (education) and unrelated areas.
• City Fringe locations (Shoreditch / Hoxton / Spitalfields / Whitechapel) include growing numbers of small Architectural and Design practices and Marketing / Advertising Agencies with reputations for quality and innovation. This is matched by small number of Designer Fashion businesses operating at the top end of the market.
• Sector in TGLP dominated by creation and production rather than distribution and exhibition / sale and consumption in most sectors.
• Some strong links to local artisanal and manufacturing traditions (City Fringe).
• Strong links to HEI excellence in contemporary visual practice in Deptford /Goldsmiths.
• Tendency to locate in post industrial inner urban locations and to grow identifiable wider lifestyle environment ( pubs /clubs / bars etc).
• Vulnerable to property market and city expansion now undermining the complex ecology of the sector in key clusters.
• Under-networked.

2.5 Key Issues for the Design and Visual sectors in TGLP

INFRASTRUCTURE

Property
• The sector faces an urgent and significant need for the development of property strategies which are permeable to its needs.

Clusters
• The Design/Visual sector tends to cluster in particular types of location. The strength of the property market and the eastwards shift of the City add pressure to the need to understand, Identify and Support existing and emerging clusters.

ICT infrastructure
• Design and Advertising sectors have opportunity for significant growth in response to new technologies. Availability of bandwidth will be a key factor in preventing migration and in attracting location, relocation and inward investment.

Development sites and opportunities
• A “New City” with a requirement for 100K new homes and major development sites creates opportunity to build on and recent high profile contemporary architecture –and relationships with major architectural and design practices and address wider public realm management and design issues.

Transport
• Transport links to Central London, other cluster/creative zones, and to international travel are essential to a sector which looks further afield for its main markets.

BUSINESS SUPPORT

Business Advice and training
Need for sector-specific business support and training for freelancers, Micros and SMEs. and to ensure that HEIs offer appropriate levels of skills in entrepreneurship and e-commerce on undergraduate courses.

Market development and promotion
Support for TGLP Micro and SME’s in this sector is required to enable them to compete successfully in London, UK and global markets.

Inward investment and venture capital : access to funding, investment and new financial instruments
Access to venture and investment capital remains a significant issue for the sector. New financial instruments – especially those which reflect the hybrid, public / private economic mix of large parts of the sector – are required.
NETWORKS AND PEOPLE
Creating and supporting CI networks
Support is required to develop and support existing and emerging virtual and face-to-face networks.

Building stronger links with other industry sectors in the TG
The sector needs support to exploit the significant scope for developing links with TGLP manufacturing industry.

The role of active intermediaries and brokers
This fragmented and unconventional sector needs the support of existing and new intermediaries/ brokers to develop networks and business synergies.

FORESIGHT, INNOVATION AND KNOWLEDGE
Entrepreneurship and e-commerce
Need to ensure that F&HEIs offer appropriate levels of skills in entrepreneurship and e-commerce on undergraduate courses.

Foresight and analysis
Fragmented and complex sector with insufficient foresight and analysis functions, and lack of market information.

2.6 Design and Visual : Industry Case Studies
The following tables set out a more detailed analysis of the structure and key issues facing the Design and Visual Arts sectors in the Thames Gateway London region. Evidence and analysis drawing on detailed research into two sub-sectors – Design and Visual Arts are followed by a brief analysis of every industry sub sector within the Design and Visual group.
THE DESIGN SECTOR IN THAMES GATEWAY LONDON

<table>
<thead>
<tr>
<th>Category</th>
<th>City Fr.</th>
<th>LBBD</th>
<th>LBBex</th>
<th>LBGr</th>
<th>LBHac</th>
<th>LBHav</th>
<th>LBNew</th>
<th>LBRed</th>
<th>LBTH</th>
<th>LBWF</th>
<th>Dartford</th>
<th>Thurrock</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designer/ maker</td>
<td>247</td>
<td>3</td>
<td>6</td>
<td>25</td>
<td>488</td>
<td>1</td>
<td>85</td>
<td>33</td>
<td>9</td>
<td>273</td>
<td>37</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Graphic designer</td>
<td>129</td>
<td>2</td>
<td>9</td>
<td>15</td>
<td>79</td>
<td>6</td>
<td>30</td>
<td>9</td>
<td>6</td>
<td>32</td>
<td>12</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Design consultant</td>
<td>81</td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>35</td>
<td>2</td>
<td>9</td>
<td>3</td>
<td>2</td>
<td>14</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Display artist/designer</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>1</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>CAD design services</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Printers with design service</td>
<td>9</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Exhibition design</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Product designer</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Totals</td>
<td>474</td>
<td>8</td>
<td>21</td>
<td>53</td>
<td>616</td>
<td>15</td>
<td>127</td>
<td>51</td>
<td>23</td>
<td>332</td>
<td>53</td>
<td>11</td>
<td>8</td>
</tr>
</tbody>
</table>

Key Issues: General UK and London

- 73% of design consultancies employ 20 staff or fewer
- Of design agencies with a turnover of more than £1m, 36% account for 86% of entire sub-sector turnover
- 80% of design graduates wish to set up own businesses
- Export of design services has shown exceptional growth since 1998 – estimated at £1bn for design consultancies in 2000
- UK has world-class reputation as world centre for leading edge design.
- 24% increase in arts and design undergraduate and post graduates in 4 years
- Design seen as a key sector in UK’s economic growth and success in C21st
- Impact of new technologies very significant bringing a large new income stream to the sub-sector.
- Growth of digital media and ICT will increase demand for competitive edge via the design of web sites and supporting technologies will lead to considerable growth.
- The average projected growth of fees in this sector is 106% over the next 12 months
- Maintaining global competitiveness will be linked to exploitation of new technologies and to creative and technical skills to support the industry

Key Issues: TGLP

- Impact of property market, City expansion and gentrification on design clusters in City fringe
- Support to develop networks, markets and export through existing organisations needs additional support
- Significant scope for developing links with TGLP manufacturing industry (Ford Design Centre / inward investment)
- Significant scope to expand and provide services direct to Financial Services and Publishing Clusters in canary Wharf

TGLP: Cluster/ Locations

- Research confirms significant clustering in Hackney, the City Fringe, and Tower Hamlets with smaller clusters in Lewisham, Waltham Forest, Greenwich and Newham.
- 79% of companies and individuals were located in the City Fringe, Hackney and Tower Hamlets.

---

6 Please refer to Appendix 1 for sources and further explanation
7 Creative Industries Mapping Document, op cit
8 Ibid
9 Staff in design companies only; total estimate for employment in design related companies is c.1m – freelancers not counted. CI Mapping Document, op cit
10 all data, Creative Industries Mapping Document, op cit
## THE VISUAL ARTS SECTOR IN THAMES GATEWAY LONDON

<table>
<thead>
<tr>
<th>Revenues</th>
<th>Not known</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td></td>
</tr>
</tbody>
</table>
- UK 45,000
- London 13,500
- TGLP unknown |

<table>
<thead>
<tr>
<th>Industry Structure in TGLP / number of companies</th>
<th>Category</th>
<th>City Fr.</th>
<th>LBBD</th>
<th>LBEx</th>
<th>LBGr</th>
<th>LBHac</th>
<th>LBHav</th>
<th>LBLew</th>
<th>LBNew</th>
<th>LBRed</th>
<th>LBTH</th>
<th>LBF</th>
<th>DTarfotd</th>
<th>Thurrock</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artists Studios</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Artists resource: 0 1 1 3 0 0 1 0 2 0 1 0 0 9  
- Art materials supplier/Framer: 17 4 5 10 11 9 15 3 8 12 13 8 6 9 124  
- Education/training (HE/FE/Access courses): 1 1 1 1 1 3 2 1 2 0 13  
- Artists Group/Art or Community Arts Project: 0 0 0 25 2 0 7 0 0 2 0 0 0 36  
- Exhibition space/Gallery/Art dealer: 22 0 0 15 27 2 20 1 4 39 3 3 2 138  
- Art publisher/Dealer: 2 0 0 0 3 0 0 1 0 1 0 0 0 0 7  
- Art and Craft shop: 1 1 3 6 3 2 4 0 0 0 3 1 1 25  
- Other/miscellaneous: 1 0 0 6 0 0 1 0 0 0 0 0 0 8  
| Totals: | 49 7 10 73 66 14 57 10 13 81 20 13 12 425 |

| Key Issues: General |  
- Graduates have poor business skills – HEIs often fail to incorporate business and ICT skills into training  
- Across sector need for greater access to business support services  
- Fragmented sector dominated by individuals who may work part-time, and occasional job-holding and multiple job holding  
- Lack of industry experience within a growing export markets  
- Lack of subsidy on full-time courses  
- Need for long term low cost workspace  
- Need for support in exploiting value of work  |

| Key Issues: TGLP |  
- Pressure on workspace in key City Fringe clusters as City moves East major threat to important visual/design/media focus for innovation in London  
- Closure of major studio blocks – Cable street, Carpenters Road – and need to prevent migration out of TGLP  
- Lack of a central register for studio accommodation in London  
- Difficulty of finding suitable buildings for new studio spaces  
- Increasingly difficult for artists to negotiate for studio premises privately  
- Support for emerging network organisations to develop significant virtual and IRT networking and support opportunities  
- Need for access to business advice and support  
- Cluster and workspace strategies to underpin, further develop or grow Visual Arts Clusters in Hackney, Tower Hamlets, Greenwich, Lewisham, Stratford and Walthamstow. |

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11 Please refer to Appendix 1 for sources and further explanation
12 Creative Energy, op cit
TGLP Creative and Cultural Industries Report
Data Report

TGLP: Clusters
- Main clusters of Activity are City fringe, Hackney, Tower Hamlets, Lewisham, Greenwich and Newham
- In photography in 1995 61% of employment was located in Hackney, Lewisham and Tower Hamlets by 1999 this had risen to 69% despite a reduction in employment in Lewisham and with Hackney alone accounting for 31% of all TGL employment

ADVERTISING

Revenues
- UK £15,988bn
- London £11,98bn
- TGLP not known

Employment NOMIS 1999
- GB 84,512
- London 34,329
- TGLP 3,553
- TGLP employment as a % of London Total 9.5%

Key Issues: General
- High dependency on success of Global economy
- Global competition faced by London
- On-going growth in digital markets
- Structural weakness in identifying and nurturing new talent
- Addressing skills shortages and training key issues for global competitiveness
- Growing services / accounts for SMEs

Key Issues: TGLP
- Central and West London Focus for high end companies
- Wider skills / training environment needs to be in place to attract relocation
- Support for TGLP Micro and SME’s to compete in London, UK and global markets

TGLP: Clusters / Locations
- Canary Wharf I major international company
- Micro and SME agencies clustering in City Fringe links to City Fringe strengths in design and visual
- In 1995 44.5% of TGL employment was located in The City, Hackney and Tower Hamlets by 1999 this share of employment had risen to 68.5%

---

13 Creative Industries Mapping Document, op cit
14 75% of industry revenues generated in London : Creative Energy, op cit
### ARCHITECTURE

<table>
<thead>
<tr>
<th>Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UK:</strong> £1.7bn&lt;sup&gt;15&lt;/sup&gt;</td>
</tr>
<tr>
<td><strong>London:</strong> £6.5m&lt;sup&gt;16&lt;/sup&gt;</td>
</tr>
<tr>
<td><strong>TGLP:</strong> not known</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment NOMIS 1999</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GB:</strong> 300,842</td>
</tr>
<tr>
<td><strong>London:</strong> 55,416</td>
</tr>
<tr>
<td><strong>TGLP:</strong> 7,339</td>
</tr>
<tr>
<td>TGLP employment as a % of total London employment: 13%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Issues: General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demand for significant increase in new housing in UK and challenges of consequences for environment / sustainability</td>
</tr>
<tr>
<td>Increased Government interest in quality of design of built environment and public realm</td>
</tr>
<tr>
<td>Impact of new technologies on practice, workspace and residential design</td>
</tr>
<tr>
<td>World reputation of UK architecture for innovation and creativity to be better promoted in export drives</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Issues: TGLP</th>
</tr>
</thead>
<tbody>
<tr>
<td>TGLP a “New City” with requirement for 100K new homes – opportunity to build relationships with major practices</td>
</tr>
<tr>
<td>TGLP location for major infrastructure development and recent high profile contemporary architecture – DOME, Jubilee Line Extension</td>
</tr>
<tr>
<td>Wider public realm management and design issues</td>
</tr>
<tr>
<td>London Industry primarily located in central / West London</td>
</tr>
<tr>
<td>Strong links to City fringe design and making community – support needed for practices to remain located in wider design/visual cluster</td>
</tr>
<tr>
<td>Stephen Lawrence Centre has potential to locate TGLP region more centrally in London’s wider professional and training environment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TGLP: clusters / Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micro and SME practices located in City Fringe linked to wider design / visual cluster</td>
</tr>
<tr>
<td>In 1995 43% of TGLP employment was located in The City, Hackney and Tower Hamlets by 1999 this share had reduced to 42%.</td>
</tr>
</tbody>
</table>

---

<sup>15</sup> Creative Industries Mapping document, Op Cit
<sup>16</sup> Ibid
### CRAFTS

<table>
<thead>
<tr>
<th>Revenues</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>£400m&lt;sup&gt;17&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>London</td>
<td>£0.75m&lt;sup&gt;18&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>TGLP</td>
<td>not known&lt;sup&gt;19&lt;/sup&gt;</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>23,400&lt;sup&gt;20&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>London</td>
<td>not known</td>
<td></td>
</tr>
<tr>
<td>TGLP</td>
<td>Employment figures available through the analysis of the Labour Force Survey provide very partial and possibly inappropriate data on this, largely self-employed sector. Data available identifies employment in craft related manufacturing as follows:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>GB 1999</td>
<td>28,749</td>
</tr>
<tr>
<td></td>
<td>London 1999</td>
<td>2,613</td>
</tr>
<tr>
<td></td>
<td>TGLP 1999</td>
<td>319</td>
</tr>
</tbody>
</table>

### Key Issues: general
- Globilisation of taste and homogenisation of products has counter effect of increasing value and desirability of unique or niche market products
- Industry structure indicate high numbers of sole traders with significant needs in developing business skills
- New technologies have scope for significant exploitation
- Limited collaborations with manufacturing industry
- Fragmented and complex sector with insufficient foresight and analysis functions

### Key Issues; TGLP
- Impact of property market, City expansion and gentrification on designer maker clusters in City fringe
- Strong local clusters linked to manufacturing traditions (City Fringe) and HEIs (Deptford)
- Support to develop networks, markets and export through existing organisations needs additional support
- Significant scope for developing links with TGL manufacturing industry

### TGLP: Clusters / Locations
- City Fringe – Shoreditch / Hoxton / Whitechapel / Spitalfields
- Hackney
- Deptford
- Greenwich
- Stratford

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<sup>17</sup> *Creative Industries Mapping Document*, op cit

<sup>18</sup> *Creative Energy*, op cit: the figure is likely to be larger

<sup>19</sup> Not only is data in this sector hard to collect – definitions are mutable. It may well be the case that a number of people working in Crafts have been counted as part of the detailed assessment of the Design and Visual Arts Sectors (above)

<sup>20</sup> *Creative Industries Mapping Document*, op cit
### DESIGNER FASHION

<table>
<thead>
<tr>
<th>Revenues</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
<td>£600M²¹</td>
</tr>
<tr>
<td></td>
<td>London</td>
<td>not known</td>
</tr>
<tr>
<td></td>
<td>TGLP</td>
<td>not known</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK:</td>
<td>1000-1500 direct in designer industry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>C10,000 employed in machining, pattern cutting, manufacturing, marketing, distribution and retail²²</td>
</tr>
<tr>
<td></td>
<td>London</td>
<td>not known</td>
</tr>
<tr>
<td></td>
<td>TGLP</td>
<td>not known</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Issues: general</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Failure of Young designers / industry in general to exploit marketing opportunities of Internet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Venture and investment capital for graduates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business skills for graduates and Micro/SMEs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Failure to build effective relationships with manufacturers (as achieved in Italy and France)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talent retention in UK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of market information and foresight</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Issues: TGLP</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of presence of Designer end of TGLP “rag trade”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TGLP area associated with rag trade not high end fashion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building links between design/crafts/makers clusters in city fringe and East London manufacturing industry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of finance and business skills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property issues in City Fringe Design/visual clusters</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TGLP: Clusters/Locations</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Link to City Fringe visual/design clusters and to traditional manufacturing in Shoreditch / Hoxton</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

²¹ ibid
²² ibid
3. The media and live arts sector in Thames Gateway London

The Media and Live Industry set of the Creative Industry sector is taken to include the following distinct industry sectors:

Film, Video and Broadcast Media
Interactive Leisure Software, Software and Computer services
Music
Dance
Performing Arts and Literary Activities
Publishing

3.1 Media and Live Arts : Industry Context

New technologies and technological convergence
- Availability of bandwidth will be a key factor in development of the Media sector and in its location and inward investment decisions.
- Increasing hybridity across Media / Live and Visual / Design enabled by new technologies.
- New technologies offer growth potential in way the internet can add to or change the ways in which music, the written word, games, performance can delivered to the consumer.
- Technologically driven leisure software and software development sector depends on continued introduction of faster and more sophisticated hardware.
- Lack of investment in skills in and exploitation of new technologies in Live arts and declining audiences for live theatre and audience profiles tend to the upper age ranges.
- Increased competition for the leisure pound from new technology related products and services – gaming, expansion of TV channels etc

Globalisation
- Media Industry heavily dependent upon global economic conditions and subject to global competition.
- London seen as world centre for specialist technical and creative skills – “Soho” in many ways part of the “Hollywood” cluster.

Finance
- Lack of access to investment finance for significant parts of the sector and at UK level availability of investment for full transfer to digital transmission a major concern.
- Synergy and relationship between subsidy and commercial an essential characteristic of this sector.
- Need to develop new forms of financial mechanism to support creative industries.

IPR
- Piracy / IPR and copyright protection major issues across the sector.

Industry structure
- The “Hourglass”\(^{23}\) effect: a very large number of very small companies and a very small number of very large companies with large number of freelance sole traders and few medium scale companies. A tendency to spin out and diversify rather then to grow in a straight line.

Foresight and Innovation
- Development of Personal Video recorders, increased interactivity and digitalisation - predicting their impacts on small scale production companies and responding a key foresight issue.

\(^{23}\) Banking on Culture, 2000
Supporting risk taking and innovation alongside research and develop essential to the overall health of the performing industry and related sectors (Film, TV, Radio).

Overall lack of foresight activities and data analysis in large parts of sector.

Skills and Talent

- Structural weakness in identifying and nurturing new talent.
- Addressing skills shortages and training key issues for global competitiveness especially in technology skills.
- Growing hybridity requires more skills and skill mixes than ever before.
- Industry structure indicate high numbers of sole traders and micro businesses with significant needs in developing business skills.
- Talent retention in UK.

3.2 Media and Live Arts Employment in TGLP

Large parts of this sector are dominated by freelance sole traders and for this reason it is particularly difficult to assess both total employment in the sector, and in specific sub-sectors and the total number of companies.

Table 7
Total Identified Employment : Media and Live Arts
(Includes NOMIS figures for Publishing and Print, Music, Performing Arts and Literary, Library and Archive, Broadcast Media, Leisure Software and Software and Computer services)

<table>
<thead>
<tr>
<th>Area and Date</th>
<th>Total Employed</th>
<th>% + / - since 1995</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Britain 1995</td>
<td>882,309</td>
<td>-</td>
</tr>
<tr>
<td>Great Britain 1999</td>
<td>1,085,821</td>
<td>+ 19%</td>
</tr>
<tr>
<td>London 1995</td>
<td>246,841</td>
<td>-</td>
</tr>
<tr>
<td>London 1999</td>
<td>311,616</td>
<td>+ 21%</td>
</tr>
<tr>
<td>TGL Region 1995</td>
<td>46,655</td>
<td>-</td>
</tr>
<tr>
<td>TGL Region 1999</td>
<td>60,363</td>
<td>+ 23%</td>
</tr>
</tbody>
</table>

The most significant area of increase in employment is in Computer Software, Hardware and related activities which across Great Britain, London and the TGL region have increased by just under 50% in this period. The single largest area of employment in Great Britain, London and TGL in this industry set is Publishing, Print and related activities.

On the basis of this data we can assess the share of Greater London employment in the sector. Whilst the same strictures apply about the limited value of this evidence it does enable us to draw some comparative conclusions about the relative strength of this group of sectors in relation to the whole of London.

Table 8
TGLP Design and Visual Employment compared with London as a whole

<table>
<thead>
<tr>
<th>TGLP as % of London total employment in Media and Live1995</th>
<th>19%</th>
</tr>
</thead>
</table>
3.3 **Media and Live Clusters and Location in TGLP**
Employment is heavily concentrated in The City / City Fringe, Tower Hamlets and Hackney with 54% of employment in Film, Video and Broadcast Media and 55% of publishing employment concentrated in Hackney and Tower Hamlets and 58% of Computer and Software activity and 52% of performing arts and literary activity concentrated in The City, Hackney and Tower Hamlets. There is a significant cluster of dance activity in Lewisham concentrated around the Laban centre in Deptford.

3.4 **Media and Live Arts in TGLP: Industry Characteristics**
- Dominated by freelance sole traders, Micro businesses (employing up to 9 people) and SMEs. Individual performers (dancers, musicians, actors) and writers may work part – time, have multiple jobs in related areas (education) and unrelated areas.
- Reputation for performing arts in TGLP based on small number of high profile venues in limited locations – Barbican, Theatre Royal Stratford East, Greenwich Theatre, The Albany, The Laban Centre, Hackney Empire - in some cases limited in capacity to attract TGLP wide audiences because of poor public transport links. Barbican and Blackheath Concert Halls the main venues for regular classical performance – heavily concentrated in west end of TGLP area.
- Restructuring, new ownership and new means of production of newspapers and the move of major newspaper publishers to the Isle of Dogs in the 1980s has led to a shift of emphasis in Newspaper Publishing from the old Fleet Street to a new locus within TGLP. Lack of evidence of secondary impact of this on local creative economy – designers, writers, etc and Book and Magazine publishing largely located in central and west London, some in historic Cultural Quarters (Bloomsbury / Fitzrovia) with no evidence of a shift east.
- Film, Video and new media production companies, small games and software developers located in City fringe area vulnerable to property market and city expansion now undermining the complex ecology of the sector in key clusters.
- Strong links to HEI excellence in contemporary Dance practice in Deptford/Goldsmiths.

3.5 **Key Issues for the Media and Live Arts sectors in TGLP**

**Infrastructure**
- Property and cluster development
  - Film, Video and New Media face an urgent and significant need for the development of property strategies which are permeable to its needs and which address the impact of the property market, City expansion and gentrification on existing or emerging clusters.
- ICT
  - Providing sufficient access to bandwidth will be a significant factor in attracting inward investment and relocation and in preventing migration.
- Transport
  - TGLP faces significant competition in attracting inward investment in the high-end new technology and media markets – the M11 / Cambridge Corridor to the north and the M4/M40 Oxford/Reading axis to the West.
  - Good Transport links are a key factor for companies in attracting higher skilled workers and TGLP will need to improve and promote it transport connections as part of its inward investment strategy.

**New Cultural Infrastructure**
- The development of a Black and Asian Cultural infrastructure, and leadership is both a priority for cultural planning in the region and a significant market opportunity.
Improving the wider environment
- The image and amenity of the TGLP area, crime and the fear of crime, poor cross-region transport are factors deterring audiences and business relocation.

Business Support
Business Advice and training
- Need for sector-specific business support and training for freelancers, Micros and SMEs and building capacity in Black and Asian creative infrastructure and leadership a key priority for the region.

- Investing in ICT skills and raising overall educational standards will be key factors in enabling TGLP’s communities to benefit from the projected on-going growth in the media sector.

Market development and promotion
- Support for TGLP Micro and SME’s in this sector is required to enable them to compete successfully in London, UK and global markets.

Inward investment and venture capital: access to funding, investment and new financial instruments
- Access to venture and investment capital remains a significant issue for the sector. New financial instruments – especially those which reflect the hybrid, public / private economic mix of large parts of the sector – are required.

Networks and People
Creating and supporting CI networks
- Support id required to develop and support existing and emerging virtual and face to face networks

The role of active intermediaries and brokers
- This fragmented and unconventional sector needs the support of existing and new intermediaries/ brokers to develop networks and business synergies.

Foresight, Innovation and Knowledge
- Predicting the impact of convergence, increased interactivity and digitalisation on small-scale production companies and responding a key foresight issue.
- Supporting risk taking and innovation alongside research and develop essential to the overall health of the performing industry and related sectors (Film, TV, Radio).
- Overall lack of foresight activities and data analysis in large parts of sector.

3.6 Media and Live: sub sector case studies
The following tables set out a more detailed analysis of the structure and key issues facing the Film and Broadcast and Dance sectors in the Thames Gateway London region. These are followed by a brief analysis of every industry sub sector within the Media and Live group.
THE FILM, VIDEO AND BROADCASTING SECTOR IN TGLP
(see Appendix 1 for sources and explanation)

REVENUES
- UK £15.74bn
- London £10.5bn
- TGLP not known

Employment
NOMIS 1999
- GB 99,451
- London 51,180
- TGLP 2,121
- TGLP employment as a % of total London employment 4%

Number of companies in TGLP area and TGLP industry Structure

<table>
<thead>
<tr>
<th>Category</th>
<th>City Fr</th>
<th>LBBD</th>
<th>LBEx</th>
<th>LBGr</th>
<th>LBHac</th>
<th>LBHav</th>
<th>LBLev</th>
<th>LBNew</th>
<th>LBRed</th>
<th>LBTH</th>
<th>LBWF</th>
<th>Dartford</th>
<th>Thurrock</th>
<th>Total</th>
</tr>
</thead>
<tbody>
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<td>5</td>
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<td>13</td>
<td>11</td>
<td>51</td>
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<tr>
<td>Crew</td>
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<td>Total facilities - see Appendix</td>
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<td>36</td>
<td>171</td>
<td>33</td>
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</tr>
</tbody>
</table>

Key Issues: General and additional data for extended analysis
- London seen as world centres for specialist technical and creative skills – "Soho" in many ways part of the "Hollywood" cluster
- Industry heavily dependent upon global economic conditions – threat of US recession will impact on UK and London industry
- The value of UK film production declined in 1998 for the second year running to £525m
- 275 Film Commissions across the world are competing with London Film Commission for inward investment that can equate to £80,000 a day into the local economy. London Film Commission estimates over the past five years £500m has come into the London economy from Film
- The level of film production in the UK in 200 broke all records
- UK market has reached saturation and admissions per screen in UK are declining.
- The number of companies is expanding and many are Micros – need financial and business support and training
- Investment for full transfer to digital transmission a concern
- Distribution of film is dominated by US companies
- Under-resourcing of script development
- DCMS assess net growth of sector @50% since 1994
- Freelancers account for 35% in audio-visual industry – but may be as high as 50%

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24 Creative Industries Mapping Document, op cit
25 estimated 75% of UK revenues generated in London, Creative Energy, op cit
26 Promoting the World City, London First & LTB, 2000
### Key Issues: contd
- Substantial consolidation in ITV ownership increases trend to small number very large and large number very small production cos in Broadcast sector.
- Commercial radio growing at 2xrate of other media in 2000 @ 12%
- Growth at 6% predicted in TV
- Development of Personal Video recorders, increased interactivity and digitalisation the dominant issues for the sector – predicting their impacts on small scale production companies and responding a key foresight issue

### Key Issues: TGLP
- Impact of property market, City expansion and gentrification on filmmaker clusters in City fringe
- Support to develop networks, markets and export through existing organisations needs additional support
- Central and West London Focus for high end companies
- Wider skills / training environment needs to be in place to attract relocation
- Support for TGLP Micro and SME’s to compete in London, UK and global markets
- Broadband connections increasingly sought as the industry develops in response to technological convergence.

### TGLP Clusters and Locations
- Based on the Nomis data 54% of all employment in TGLP was in Hackney and Tower Hamlets.
- This is backed up by the detailed assessment of the industry across the region undertaken for this study (see above).

### TGL Compared with London
- TGLP percentages of London-wide figures from The London Film Commission database are as follows:
  - 12.3% Agencies & Services (London total: 673)
  - 14.3% Camera & Grip Equipment (London total: 81)
  - 16% Education & Training (London total: 56)
  - 4.7% Film & TV Companies/organisations (London total: 472)
  - 2.1% Lighting and Electrical (London total: 144)
  - 5.3% Post Production (London total: 394)
  - 7.2% Production Companies (London total: 682)
  - 8.2% Production/rehearsal spaces (London total: 183)
  - 16.3% Sound and Music (London total: 43)
  - 18% Studios (London total: 100)
  - 14.9% Crew (London total: 6018)

---

27 Skillset/DCMS Audio Visual Industry census 2000
### DANCE IN TGLP

(See Appendix 1 for sources and explanation)

<table>
<thead>
<tr>
<th>Revenues</th>
<th>Employment</th>
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<td>Unknown – see Performing Arts Table for Employment figures drawn from Nomis and below for detailed analysis of activity</td>
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#### Dance companies / individuals in TGLP

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<th>LBBD</th>
<th>LBBex</th>
<th>LBGr</th>
<th>LBHac</th>
<th>LBHav</th>
<th>LBLev</th>
<th>LBNew</th>
<th>LBRed</th>
<th>LBTH</th>
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#### Key Issues:

**General**
- Synergy and relationship between subsidy and commercial an essential characteristic of this sector
- Need to develop new forms of financial mechanisms to support creative activity in the performing arts in general
- Supporting risk taking and innovation alongside research and develop essential to the overall health of the performing arts
- Capacity building (skills in business, finance and IT) progressing but more needs to be done
- Lack of investment in skills in and exploitation of new technologies
- Increased competition for the leisure pound from new technology related products and services – gaming, expansion of TV channels etc
- Potential benefits from links to health and fitness industry and issues
- Continues lack of National Infrastructure for Dance and small share of the subsidy “cake”
- Future career prospects and financial security for dancers who have a short career often curtailed by fitness / injury

**TGLP**
- Poor infrastructure to support professional dancers and poor facilities, though TGLP region may be better served than west of London; Lottery funding has tended to be granted for education and training rather than working facilities.
- Lack of marketing mechanisms, programming budgets etc. as compared with central London venues means that development of dance in the region faces an uphill struggle; transport improvements ironically may facilitate local audiences to visit central London as much as enabling audiences to come to events outside the centre.
- Understanding of role of development agencies is hard to get across, particularly without adequate support, since they are a relatively new concept. However, there appears to be increasing appetite for dance activities, e.g. after-school clubs (assisted by New Opportunities Funding)
Although the presentation of alternative, site-specific projects has taken place in the region and proved successful in bringing in new and diverse audiences, such activities are costly in money and time to present, and resources are lacking.

- Given the concentration of dance activity in the TGLP region, there is a great opportunity for new and strategic work to be done, and this opportunity should not be lost.
- Availability of programmes and staffing reflecting the cultural richness and diversity of the region remains limited and may impact on the success of the sector in the region.
- Attracting audiences to venues a key issue linked to transport issues, perceptions of public safety and the existence of a wider critical mass of creative/cultural/lifestyle opportunities in an area.
- Political support required to promote investment from Local Government, LA and ACE in TGLP area artists and infrastructure.
- Skills gaps in business, finance, IT and Marketing need to be addressed.
- Investing in research and development and innovation will reap long term benefits across TGLP.

Lewisham – focussed around Deptford and The Laban – is the major cluster for dance activity in the region. Other significant Clusters are in Hackney, Greenwich and Tower Hamlets.

TGLP; Dance Clusters and Location

- TGLP percentages of London-wide figures from The Place Dance Services databases are as follows:
  - c.64% Individual Dancers (London total: 495)
  - c.19% Organisations/companies/publications (London total: 232)
  - c.36% Venues and promoters (London total: 39)
  - c.7.5% Rehearsal spaces on Space Directory (London total: 456)
## INTERACTIVE LEISURE SOFTWARE, COMPUTER SOFTWARE AND SERVICES

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<th>REVENUES</th>
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<tr>
<td></td>
<td>TGLP</td>
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<table>
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<tr>
<td></td>
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<td>95,726</td>
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<td>TGLP</td>
<td>18,819</td>
</tr>
<tr>
<td></td>
<td>TGLP employment as a % of total London employment</td>
<td>19.5%</td>
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<table>
<thead>
<tr>
<th>Key Issues: General</th>
<th></th>
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<tbody>
<tr>
<td>Continuous growth rates for employment in double figures mean that employment and demand for skilled staff will remain high</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intense competition for skilled staff tends to location of clusters in areas with good access and transport – M4/M40/M11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth likely to continue on fast track despite recent share volatility</td>
<td></td>
<td></td>
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<tr>
<td>To attract skilled staff companies need to widen their contacts with the potential labour pool</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of bandwidth will be a key factor in development of the sector</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Issues: TGLP</th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Major competition on either side of TGLP – M11/ Cambridge and M4 / M40 Reading – Oxford</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TGLP will increasingly have the transport infrastructure to attract new investment in the sector and will need promote locations and transport links to this end</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing sufficient access to Broadband will also be a factor in attracting inward investment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ICT skills essential in most employment segments but none more so than this – skills gaps are huge but the rewards for the properly trained will be high. Investing heavily in the ICT skills of TGLP’s population as well as raising overall educational standards will be key factors in enabling TGLP’s communities to benefit from the on-going growth in this sector.</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>TGLP: clusters /locations</th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>In 1995 50% of employment was located in The City, Hackney and Tower Hamlets by 1999 this had risen to 58%. Otherwise employment is spread across the region.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

²⁸ Creative Industries Mapping Document, op cit
### MUSIC

#### Revenues
- **UK**: £4.6bn
- **London**: £2.3bn\(^{29}\)
- **TGLP**: not known

#### Employment
- The quality of data available through the Nomis data makes it almost impossible to assess employment in the sector on a comparative basis. The totals available refer to Recording of Music only. These have been included in the global total for Media and Live and for all Creative industries but form too small a sample to shed any direct light on the sector in TGLP and its relative strength compared with London.

#### Key Issues: general
- Industry structure includes high numbers of part-time and occasional job-holding and multiple job holding
- 80-90% of music businesses are Micros employing up to 9 people
- small record labels, performers, venues and other service companies suffer from lack of finance and business skills
- New technologies offer growth potential in way the internet can add to or change the ways in which music is delivered
- Piracy / IPR protection remain significant issues – the Napster judgement will not in the long term stop direct downloading
- Opportunities for growth in e-commerce – in the UK books and CDs are the most popular online purchases

#### Key Issues: TGLP
- Excel / Arena – as venue for large scale live performance
- Barbican and Blackheath Concert Halls main venues for regular classical performance – heavily concentrated in West end of TGLP area
- Issue of Licensing in Pubs/ Clubs in Town centres
- Developing markets for non-western music / non-mainstream popular music and links to TGLP demographic profile

#### TGLP: Key clusters / locations
- Hackney, City / Barbican, Blackheath/Greenwich/Lewisham, Newham

---

\(^{29}\) *Creative Energy*, op cit, estimated 50% of revenues generated in London.
## Performing Arts (Including Literary Activities)

### Revenues
- UK £470m
- London £300m
- TGLP not known

### Employment
- GB 126,874
- London 42,795
- TGLP 6,099
- TGLP employment as a % of total London employment: 14%

### Key Issues: General
- Synergy and relationship between subsidy and commercial an essential characteristic of this sector
- Need to develop new forms of financial mechanisms to support creative activity in the performing arts
- Supporting risk taking and innovation alongside research and development essential to the overall health of the performing industry and related sectors (Film, TV, Radio)
- Capacity building (skills in business, finance and IT) progressing but more needs to be done
- Lack of investment in skills in and exploitation of new technologies
- Declining audiences for live theatre and audience profiles tend to the upper age ranges.
- Increased competition for the leisure pound from new technology related products and services – gaming, expansion of TV channels etc

### Key Issues: TGLP
- Reputation for performing arts in TGLP based on small number of high profile venues in limited locations – Barbican, Theatre Royal Stratford East, Greenwich Theatre, The Albany, The Laban Centre, Hackney Empire in some cases limited in capacity to attract TGLP wide audiences because of poor public transport links.
- New developments in Deptford (The Laban), Stratford, Walthamstow and increased funding for the Queens Hornchurch signal real new opportunities for performing arts in the region.
- Lack of high profile Black and Asian venues and companies may start to be addressed if proposals for The Rich Mix Centre and other major capital schemes receive lottery funding
- Major strengths which need support and profile are new writing and Dance (see Dance analysis)
- Availability of programmes and staffing reflecting the cultural richness and diversity of the region remains limited and may impact on the success of the sector in the region
- Attracting audiences to venues a key issue linked to transport issues, perceptions of public safety and the existence of a wider critical mass of creative/cultural/lifestyle opportunities in an area
- Political support required to promote investment from Local Government, LA and ACE in TGLP area artists and infrastructure
- Skills gaps in business, finance, IT and Marketing need to be addressed.
- Investing in research and development and innovation will reap long term benefits across TGLP

### TGLP; Clusters and Location
- Barbican
- Hackney
- Greenwich/Blackheath
- Stratford
- Deptford
- Emerging clusters may include
  - Hornchurch
  - Dartford
  - Walthamstow
- **The City of London, Tower Hamlets and Hackney together account for 52% of all employment in the sector. The wider “inner east” ring including these three, Greenwich, Lewisham and Newham together account for 70% of all TGLP employment in the sector**

---

30 Creative Industries Mapping Document, op cit
31 of which £250M+ is generated by West End Theatres, Creative Energy, op cit
### Publishing

<table>
<thead>
<tr>
<th>Revenues</th>
<th>UK</th>
<th>£18.5bn[^32]</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>£ 5.5bn[^33]</td>
<td></td>
</tr>
<tr>
<td>TGLP</td>
<td>not known</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment NOMIS 1999</th>
<th>GB</th>
<th>450,358</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>120,207</td>
<td></td>
</tr>
<tr>
<td>TGLP</td>
<td>33,210</td>
<td></td>
</tr>
</tbody>
</table>

| TGLP employment as a % of total London employment | 27.5% rising to 50% of London’s employment in Newspaper Publishing and 79% of London’s employment in Newspaper printing. |

### Key Issues: General

- Book market has continued to increase year on year – retail sales in 2002 show 10% increase on previous year.
- Advertising revenues for Newspapers and Magazines also forecast to grow
- Significant impact of new technologies on e-commerce, online publication and content development a major growth area supporting sales of traditional printed books/newspapers etc.
- L222inks between Digital Content publishing and other CI sectors
- 15,000 employed in “New Media Titles” in London[^34]
- Multinational ownership threatens smaller innovative publishers but this may be countered by opportunities to publish on line and exploit e-commerce.
- Piracy, IPR protection and copyright major issues
- Links to e-commerce, development of digital media etc requires more skills mixes than before
- Supporting small publishers with Venture Capital to develop electronic publishing

### Key Issues: TGLP

- Restructuring, new ownership and new means of production of newspapers and the move of major newspaper publishers to the Isle of Dogs in the 1980s has lead to a shift of emphasis in Newspaper publishing from the old Fleet Street to a new locus within TGLP.
- Lack of evidence of secondary impact of this on local creative economy – designers, writers, etc
- Book and Magazine publishing largely located in central and west London, some in historic Cultural Quarters (Bloomsbury / Fitzrovia) – no evidence of a shift East
- Small number of Literature and Community Publishing projects in Hackney / Tower Hamlets have had influence at a local level
- No evidence of critical mass of significant publishing companies although likely to be a large number of writers/journalists living and in some cases working within the region – how give them more of a profile
- Evidence of non-English language publishing clusters not available.

### TGLP Clusters/Location

- Tower Hamlets has 42% of all employment in the TGL region. The second largest concentration of employment is in Hackney and the two boroughs taken together account for 55% of all employment. There are significant clusters of print employment in Waltham Forest, Lewisham and Greenwich.

[^32]: Creative Industries Mapping Document, op cit
[^33]: Creative Energy, op cit, estimated 30% of revenues generated in London based on 30% of UK Publishing Houses based in London. The revenue figure is likely to be a significant underestimate given that the majority of the UK’s largest Book and Newspaper Publishers are based in London
[^34]: New Media Knowledge, 1999
**Data Report Appendix 2**
The following Standard Industrial Classifications have been used to assess employment in the Creative and Cultural Industries:

<table>
<thead>
<tr>
<th>SIC Code</th>
<th>Sector</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2211:</td>
<td></td>
<td>Publishing of Books</td>
</tr>
<tr>
<td>2212:</td>
<td></td>
<td>Publishing of Newspapers</td>
</tr>
<tr>
<td>2213:</td>
<td></td>
<td>Publishing of Journals and Periodicals</td>
</tr>
<tr>
<td>2214:</td>
<td></td>
<td>Publishing of Sound recordings</td>
</tr>
<tr>
<td>2214:</td>
<td></td>
<td>Other Publishing</td>
</tr>
<tr>
<td>2221:</td>
<td></td>
<td>Printing Of Newspapers</td>
</tr>
<tr>
<td>2222:</td>
<td></td>
<td>Printing</td>
</tr>
<tr>
<td>2223:</td>
<td></td>
<td>Bookbinding and Finishing</td>
</tr>
<tr>
<td>2224:</td>
<td></td>
<td>Composition and Plate making</td>
</tr>
<tr>
<td>2225:</td>
<td></td>
<td>Other Activities Related to Printing</td>
</tr>
<tr>
<td>2231:</td>
<td></td>
<td>Reproduction of Sound Recording</td>
</tr>
<tr>
<td>2232:</td>
<td></td>
<td>Reproduction of Video recording</td>
</tr>
<tr>
<td>2232:</td>
<td></td>
<td>Reproduction of Computer Media</td>
</tr>
<tr>
<td>2621:</td>
<td>Crafts</td>
<td>Manufacture: Ceramic Household Articles</td>
</tr>
<tr>
<td>3622:</td>
<td>Crafts</td>
<td>Manufacture of Jewellery</td>
</tr>
<tr>
<td>5247:</td>
<td></td>
<td>Retail Sale of Books / Newspapers</td>
</tr>
<tr>
<td>7210:</td>
<td></td>
<td>Hardware Consultancy</td>
</tr>
<tr>
<td>7220:</td>
<td></td>
<td>Software Consultancy and Supply</td>
</tr>
<tr>
<td>7230:</td>
<td></td>
<td>Data Processing</td>
</tr>
<tr>
<td>7240:</td>
<td></td>
<td>Data Base Activities</td>
</tr>
<tr>
<td>7260:</td>
<td></td>
<td>Other Computer Related Activity</td>
</tr>
<tr>
<td>7420:</td>
<td>Architecture</td>
<td>Architectural / Engineering Activities</td>
</tr>
<tr>
<td>7440:</td>
<td>Advertising</td>
<td>Advertising</td>
</tr>
<tr>
<td>7481:</td>
<td>Visual Arts</td>
<td>Photographic Activities</td>
</tr>
<tr>
<td>9211:</td>
<td>Film and Broadcast Media</td>
<td>Motion Picture and Video Production</td>
</tr>
<tr>
<td>9212:</td>
<td>Film and Broadcast Media</td>
<td>Motion Picture and Video Distribution</td>
</tr>
<tr>
<td>9213:</td>
<td>Film and Broadcast Media</td>
<td>Motion Picture Projection</td>
</tr>
<tr>
<td>9220:</td>
<td>Film and Broadcast Media</td>
<td>Radio and Television Activities</td>
</tr>
<tr>
<td>9231:</td>
<td>Performing Arts and Literary Activities</td>
<td>Artistic and Literary Creation</td>
</tr>
<tr>
<td>9232:</td>
<td>Performing Arts and Literary Activities</td>
<td>Operation of Arts Facilities</td>
</tr>
<tr>
<td>9234:</td>
<td>Performing Arts and Literary Activities</td>
<td>Other Entertainment Activities</td>
</tr>
<tr>
<td>9240:</td>
<td>Publishing</td>
<td>News Agency Activities</td>
</tr>
<tr>
<td>9251:</td>
<td>Performing Arts and Literary Activities</td>
<td>Library and Archive Activities</td>
</tr>
</tbody>
</table>
TGLP Creative and Cultural Industries Report

Appendices to Main Report

David Powell Associates Ltd
for Thames Gateway London Partnership

September 2001
Appendix 1 (Questionnaire Responses)

Thames Gateway London Partnership: Creative and Cultural Industries Review and Strategy Development:

1. Confirmation of contact details

Greenwich Council
Barbara Holland, Economic Development Officer, Strategic Planning, Peggy Middleton House, 50 Woolwich New Road, London SE18 6HQ
Tel: 020 8921 5693 Fax: 020 8921 6283 e-mail: barbara.holland@greenwich.gov.uk
website: www.greenwich.gov.uk

CHANGE OF ADDRESS Cultural Plan Office:
New address:
Greenwich Council, Arts and Culture Office, The Borough Hall, Royal Hill, SE10 8RE
phone 020 8853 1847; fax 020 8853 1867
New email addresses are:
Carolyn Axtell: carolyn.axtell@artsgreenwich.org.uk
Alan Dix alan.dix@artsgreenwich.org.uk
Chris Lea: chris.lea@artsgreenwich.org.uk
Charlotte Grace: charlotte.grace@artsgreenwich.org.uk
Angela Rolle: angela.rolle@artsgreenwich.org.uk

London East Training & Enterprise Council
Paul Gallagher, Sector Development Manager - Cultural & Creative Industries, Boardman House, 64 Broadway, Stratford, E15 1NT
Tel - 0208 432 0027 Fax - 0208 432 0393 Email - paul.gallagher@letec.co.uk

London Borough of Newham
Carole Thomas, Business Development Officer with Creative Industries as target sector, Regeneration & Partnerships, Town Hall Annexe, 330 Barking Road, East Ham, London E6 2RP
Tel 020 8430 3312. E: carole.thomas@newham.gov.uk

University of East London
John Lock, Regional Office Development Manager, University Way, E16 2RD;
Tel 020 8223 3318; j.f.lock@uel.ac.uk; www.uel.ac.uk

The Zeppelin Company
Tariq Wahr, SME representative creative industry in East London, 5 Hardwick Court, Cambridge Park, London E11 2PT
Tel/Fax: 0208 5308791 E-mail: tariq@thezepp.com Web site: www.thezepp.com

Dartford Borough Council
Dartford Borough Council is currently without an Arts Development Officer – this person will be the contact point for the task group.
Interim Contact: Odele Clarke, Community Services Manager, Community Services Team, Civic Centre, Home Gardens, Dartford, Kent, DA1 1DR
Interim e-mail : odele.clarke@dartford.gov.uk
AND
Paula Hirst, Economic Development Officer, Civic Centre; Home Gardens, Dartford, Kent DA1 1DR
Tel: 0044 1322 343254 Fax: 0044 1322 343047
Goldsmiths College University Of London
Derek Hilyer, Regeneration Officer, Goldsmiths College, London SE14 6NW
Tel: 020 7919 7960 email: d.hilyer@gold.ac.uk

London Borough of Barking and Dagenham
Jeremy Grint, Head of Regeneration, Strategic Regeneration Group, Civic Centre, Dagenham, Essex, RM10 7BN
Tel: 020 8227 2443, Mobile: 07971 111553, Fax: 020 8227 2806
jgrint@barking-dagenham.gov.uk
OR
Victoria King, Arts Development Officer, Department of Education, Arts & Libraries, Westbury Centre, Ripple Road, Barking, Essex
Tel: 020 8220 4816, Fax: 020 8220 4811
vking@barking-dagenham.gov.uk

University of Greenwich
Dr Jane Longmore, Head of the School of Humanities, Woolwich Campus, Wellington Street, Woolwich, London SE18 6PF (n.b. from Sept.1, 2001 - Greenwich Maritime Campus)
Tel 0208 331 8800; fax - 0208 331 8805
j.longmore@greenwich.ac.uk

LB Havering
email chris.cole@havering.gov.uk

The Art in Perpetuity Trust (APT)
Educational arts charity providing 40 studios, gallery space and training.
Andrew Carmichael, Development co-ordinator and freelance consultant, 6 Creekside Deptford, SE8 4SA
Tel 07939 053 160; 0208 694 8344
a-car@dircon.co.uk

LVRPA
Lee Valley Regional Park Authority, southern section of the Regional Park falls within the Thames Gateway area. In total the Regional Park stretches from the Thames out to Ware in Hertfordshire and consists of 10,000 acres. The Park Authority has a statutory remit to develop, protect, manage and maintain the Regional Park for leisure, recreation, nature conservation and entertainments of any kind.

Key Contacts:
Richard Rutter- Partnership and Funding Officer, 01992 709 873
Tony Beckwith- Arts Development Officer, 01992 709 828,
Jane Mansell- Heritage Development Manager 01992 709 980
Nikki Christie Three Mills Development Officer 0208 215 0050
Lance Bourne Business Development Manager 01992 709829 and
Claire Martin - Planning and Development Officer 01992 709 885.
Main address
Myddelton House, Bulls Cross, Enfield, Middlesex, EN2 9HG, Fax 01992 788623
Web site- www.leevalleypark.org.uk

London Borough of Tower Hamlets (Arts and Events)
Alice Bigelow, Head of Arts (acting)
Brady Centre, 192-196 Hanbury Street, London E1 5HU, 0207 377 2801, Fax: 0207 247 9200,
email: ArtsTeamLBTH@dial.pipex.com
2. Priority Issues

Greenwich Council:
- How to retain graduates in the area
- Provision of affordable premises for business start ups and artists studios
- Provision of high quality incubator units
- Provision of sector specific business support and training
- Provision of ICT infrastructure - particularly what is the role of local authorities?
- Importance or otherwise of clustering and specialisation
- Networking/marketing/promotion - how can we use current technologies to make this effective for the sub-region?
- How do we ensure that the strategy and its implementation is socially inclusive?

LETEC:
- Specifically focussed sub sector approach, that is (sub) sector driven not agency led
- Accommodation
- Tailored business support esp. for business start-up’s
- Flexibility in delivery of training

Newham:
- Availability of affordable premises for studios, workshops and other creative SME uses – implications for planning uses, section 106 agreements.
- More effective, practical and industry relevant business support, education, training, careers advice and resources, and greater co-ordination of within and across borough boundaries – implications for joined up/linkages between major funding programmes (ERDF, SRB, DFEE, LSC, Neighbourhood Renewal etc); for more corporate working within councils between key depts; improved links to specialist NTOs; recognition as key sector by LSCs and the new London Business Link.
- Possible representative working group/partnership to co-ordinate and take forward creative industries to include specific sub-sectors such as music, etc. This would include relevant council depts, colleges, community arts groups & organisations.
- More details of priorities included in the Action Plan which you have received already.

University of East London:
Creating realistic picture of creative and cultural industry development in the TGLP area which permits a range of interested bodies to see what real opportunities already on the ground, what development/support needs there, and to establish what new initiatives may be required to ensure benefit in East London from growth in London.

The Zeppelin Co:
As an SME that works and lives in East London, the study is not just about knowing who is who and where it is happening. It is about Infrastructure and building an environment where the CCI can thrive and look forward to the next 30 years. It is about changing landscapes, identifying where support and strategy needs to be implemented, it’s about making sure all this EU funds are not being wasted on building monuments, but building projects, alliances, jobs and knowledge. It is these elements that will change perceptions and put East London on the map as a centre that contributes to London’s growth and wealth.

Goldsmiths:
- See fortifying the creative sector in north Lewisham and west Deptford, produced by the Creative Sector Development Group – largely written by me with information about the current and potential sites and activities provided by Andrew Carmichael and Russell Southwood.
- Now to ensure that Lewisham’s creation of a creative enterprise zone, and similar activity in Greenwich, is put into place in a way which both enhances the sector and links to a whole range of other initiatives both locally, in the gateway area and across London.
For each creative area of east London a similar approach could be considered – creative enterprise agency linked to SRBs and other initiatives, working within the local strategic partnership arrangement, with the borough and relating to sub-regional and regional activity.

**LB Barking and Dagenham:**
- Future markets
- Space for cultural industries (issue of artist being pushed out as land property prices rise)

**University of Greenwich:**
- A better definition of 'Creative Industries' than the DCMS version!
- Identification of the nature and extent of CI activity in East and South-East London
- Identification of the role of institutions/ agencies in encouraging such activity - including the role of national, regional and local agencies
- Clarification of the role of the CCI task group

**LB Havering:**
- Havering is beginning to consider the possibility of developing a cultural quarter including some small cultural industries around the Queen’s Theatre area in Hornchurch. There is a sizeable community of crafts workers locally and some media work.

**APT:**
- Property and accommodation for start up enterprises, artists and all sections of the CCI sector.
- Clusters and complimentary activity - Deptford works particularly well in this respect but needs strengthening and protecting. Deptford is a model that could be duplicated elsewhere in the TGLP area.

**LVRPA:**
Need to undertake a mapping exercise in East London, including the Three Mills area, to determine what and where the creative industries are and what support or secondary industries are needed to sustain these creative industries. How does the industry mix in East London differ from other creative industry quarters? e.g. around west London or in the HAC area/ (Chocolate Factory). How can the creative industries in East London become unique, dynamic and more importantly sustainable. How will local benefit from these industries? Are local skills available to meet need? Need to monitor the role of cultural strategies such as Newham’s Cultural Strategy Reasons to be cheerful, can this act as an example of best practice

**LB Tower Hamlets:**
- studio space – reduction in availability / increase in cost
- opportunities for arts in planning, development and regeneration
- training artists from black and minority ethnic communities
- maximising opportunities of film locations for local benefit
- establishing links to create effective pathways from first interest (e.g. community arts, arts education through training / education into employment / self employment)
- marketing individual artists and arts generally
3. Policy and strategy context

Greenwich Council - List of Documents:
- Draft Strategy for Cultural & Creative Industries - Greenwich Council (e-mail)
- The Legacy of the Cultural Plan (Draft) - Greenwich Council (e-mail)
- Draft Economic Strategy - Greenwich Council (e-mail)
- Draft Local Cultural Strategy - Greenwich Council (e-mail)
- A Draft Local Strategy for the Objective 2 Programme in Greenwich - Greenwich Council (e-mail)
- West Greenwich Development Framework - Greenwich Council (copy can be provided)
- UDP (copy can be provided)
- Tourism - draft strategy, plus other documents to be identified (copies can be provided)
- Arts Review (Alan Dix can provide copy)

Funding:
- Art of Regeneration - National Theatre SRB6 Programme
- Arts Grant Programme
- Objective 2/SRB6 Manufacturing
- Skillset SRB3 Programme
- Potentially other SRB Programmes in West and South Greenwich

LETec - Policy & strategy (Also - see Notes at end)
Given the context within which all TEC's/Business Links are operating it would be confusing to start outlining past strategies and priorities.

Without wishing to sound unhelpful I would suggest the LSC Remit letter as the first point of reference here. This is no act of churlishness, but it is about all the documentation I currently have that could be considered useful here.

Newham:
- Creative Industries Action Plan - You have already received
- Creative Industries in Newham (June 2000) - Can provide copies of the initial report;
- UDP - Can provide copies of the initial report
- Newham’s Economic Development Plan - Can provide copies of the initial report

UEL
None particularly relevant

Hackney:
Much work has been undertaken in Hackney in relation to cultural industries and a strategy for the future based on meetings with practitioners around basic issues such as identifying gaps in provision and projects to fill them.
- Objective Two: Some Growth Sector Strategies, 27/9/00 – paper emailed

Zeppelin:
I don’t think any of this implies to me but I have won funds for Business and technical development from London Guildhall University, East London TEC, Skillset and Objective 2 East London Film Fund.

Dartford:
- Council is beginning the process to develop a Cultural Strategy
- Arts Grants Scheme & Orchard Access Grant – grants to voluntary groups (documents emailed)
- www.kt-s.co.uk
Goldsmiths:
- A paper which establishes that goldsmiths is the uk’s leading HE provider in the creative arts (email)
- Prospectuses goldsmiths.ac.uk, and http://www.gold.ac.uk/gist/ gives more details (site designed for staff and students)
- Fortifying The Creative Sector (copy already provided)

LBBD’s Policy & Strategy Context
- LBBD Regeneration Strategy (could email)
- LBBD Arts Strategy (Email)
- Unitary Development Plan (some very general arts policies – not specifically cultural industries) (could send/fax)

University of Greenwich
- Institutional Strategic Plan and Operating Statements (management documents devised for the Higher Education Funding Council)
- HEROBC Strategy (Higher Education Reach Out to Business and the Community) - total grant c.£135,000 per annum (internal document)
- Institutional prospectuses (copies available)

LB Havering:
- Probably the UDP Ask Peter Davis 01708 432614
- Also the Cultural Strategy will refer to the CIS.
- There is a short report by Phyllida Shaw on the Arts in Havering (hard copy)
- And possibly the Leisure Review (hard copy)
- Grant or other support programmes: NONE

APT:
- APT is in the process of rewriting and printing its artistic policy, strategy etc. will send copies when ready.

LVRPA:
- Lee Valley Regional Park Authority Strategic Business Plan 2000-2010, available on web site and copy can be sent.
- Lee Valley Regional Park Arts Policy 2001 available on web site and copy can be sent.
- Grant / support programmes:
  - Support from LVRPA – information to follow, contact Nikki Christie (eg film festival on Three Mills Green) and Lance Bourne

LB Tower Hamlets policy and strategy:
- Unitary Development Plan (copy)
- Corporate Plan (copy)
- Arts Service Plan (email)
- Arts Strategy (in production)
- Arts Directory (copy)

Grant or other support programmes:
- Mainstream Grants
- Events Fund Grants

4. Research and other information

Greenwich Council - Research & Information:
"Cultural & Creative Industries in South East London - a summary of training needs" - Greenwich Community College. Internal document. Copy can be provided. Good summary of all key documents and list of references, copies of most can be provided. Focus is on training and skills.

"Vision in Art - Regeneration and the premises crisis - funding the space for art". Report of conference in July 2000. Copy can be provided.

Databases:
- Cultural Plan Office has the most comprehensive listing of local arts organisations and individuals. (Alan Dix can supply info.)
- artsgreenwich e-group
- Skills Observatory - Noel Campbell, University of Greenwich

LETec - Research and other information:
See - Notes at end

Newham
- We have a business database which includes creative industries. This will be produced in the form of 2001 Newham Business Directory to be published soon.

UEL - Research and other information:
- Skills observatory 99-00 project report
- various papers written for CSG and TGLP (DPA has these)
- TGLP economic strategy (DPA has these)

Zeppelin – Research and information:
- Newham have done a lot of research, talk to Carole Thomas
- Other groups:
  - Hidden Arts, Mazorca and Creative links
  - Tower Hamlets have also, talk to Sarah Wren

Dartford – Research and information:
- Kent Thames-side Business Directory (held by Kent Thames-side Chamber of Commerce, they can provide a copy)

Goldsmiths – Research and information:
- Skillwork Observatory (via Noel, or Anita Pilgrim and Goldsmiths). Also look at Research sites within Goldsmiths site, exp for Centres for Cultural Studies and for Urban and Community Research
- Creative Sector Forum list (a varied collection of over 60 people interested in attending twice yearly discussions at Goldsmiths)
- suggest talk to CCS and CURC referred to above – (for info to email)

LBBD – Research and information:
Research has gone into the establishment of a cultural industries quarter in Barking (The Malthouse). Management Plan being drawn up. Not sure what else is available (contact Greg Simpson 020 8227 3943 or Victoria King)
University of Greenwich
- Skills Observatory - funded by SRB Skillswork - to provide a database of local educational provision of relevance to the Creative and Cultural Industries and to offer web space to CI employers. Noel Campbell and Galena Gornostoeva of the University of Greenwich devised and maintain the Skills Observatory in association with the University of East London and Goldsmith’s College.
- Noel and Galena have also produced extensive research on employment patterns in South-East London. (Please refer to their individual responses for further details).

L B Havering:
- Research documents: not aware of any, try Pete Davis
- Databases : not aware of any
- Lists of or links to relevant or interesting websites: not aware of any

APT:
- You will have received, or already know of all the stuff I could send you, (Manchester, Kirklees etc. etc. etc.)

LVRPA:
- No info sent

LB Tower Hamlets - Research and Information:
- A Festivals Strategy for Tower Hamlets (DCA Cardiff) (copy)
- Radio Strategy (copy)
- Central Stepney Strategy (copy)
- CIDA Festivals Report by Warren Lakin (copy)
- Tower Hamlets Arts Forum (e-mail)
- Bengali Cultural Groups (e-mail)

Websites:
- www.towerhamlets.gov.uk
- www.TH2000.org
5. Partnerships and projects

Greenwich Council - Partnerships and Projects:
- **Art of Regeneration SRB Programme** - Lead Organisation is Royal National Theatre. Contact: Jenny Harris, Head of Education and Training. Tel: 020 7452 3307. e-mail: jharris@nationaltheatre.org.uk
- **United Arts Village**: informal partnership of local artists, Greenwich Community College, Bexley College, Greenwich Council, (University - invited). Aims to support setting up of artists studios in Borough, identifying premises, taking forward vision for Applied Crafts Institute for Greenwich Community College. Chaired by Cllr. Bob Harris. Lead: Geoff Pine, Principal of Greenwich Community College. Tel: 020 8488 4809. E-mail: geoffp@woolwich.ac.uk
- **Lewisham Creative Sector Development Group** - Derek Hilyer, Goldsmith's University is lead person.
- **Greenwich Business Forum** - has a Creative Industries Sector Group. Chair is Warren Wint; Vice-Chair is Alexandra Moskalenko. Admin contact is Diane Cahill.
- **Regeneration Agencies** - Greenwich. Woolwich and South Greenwich are covered by 3 regeneration agencies, with potential for funding for creative industries and arts initiatives.
- **Greenwich and Docklands Festival**. Contact: Bradley Hemmings. E-mail: bradley@festival.org

LET EC Partnerships and Projects:
In terms of partnership and Creative Industries I am the lead for LETEC. Also see end summary

Newham Partnerships:
- Newham Business Partnership (partnership of business support agencies led by LB Newham)
- SRB Partnerships especially SRB6 Arc of Opportunity
- Knowledge Dock Network (led by TGTC – private sector focus). Contact Andy Chisholm
- New Media Forum (led by East London Chamber of Commerce – private sector focus). Contact Marion Royer

Infrastructure developments include:
- Knowledge Dock proposed development (UEL site- David Hall @ TGTC);
- Burford Road live/work development (Tony Neal LBN R&P);
- Arc of Opportunity (7 year srb 6 development between Stratford & Beckton);
- Stratford Raillands;
- Stratford Cultural Quarter (Simon Cartwright – LBN R&P).

* Information about these will be in the Economic Development Plan.

Business support:
- mainly East London Small Business Centre;
- Newham 6th Form College,
- Newham College of Further Education,
- UEL.

Can send Business Opportunity Menu which provides details of all of these.

UEL - Partnerships and projects:
- prospectus - courses
- information on Multimedia Production Centre - Tony Klinger - t.d.klinger@uel.ac.uk
- connecting creative industry project (me)
Zeppelin – Partnerships and projects:
- Mondialonline, a online resource project for film, video and interactive media companies.
- New Media Forum and Creative Digital Ventures, an Industry sector Group within the East London chamber of commerce.

With Thames Gateway creative and cultural industries dimension:
- Knowledge Dock working with UEL it is has a Creative and Cultural remit that I am slowly beginning to evolve with them.
  - Best contact for this partnership - David Hall and me (Tariq)
Who represents the private/commercial/freelance sector on these partnerships?
Do not understand the question!
What are the major regeneration, infrastructure, skills development or business support projects in your borough/sector that have a creative and cultural industries dimension?
Who is the lead contact for each of these?
I will talk to you about this when I understand your question!

Dartford - Partnerships and projects
- Proposal for Kent Thames-side Cultural Strategy
- Kent Thames-side Partnership: email www.kt-s.co.uk - please see website for details of partners and contact details
- Thames Gateway Kent Partnership – newly formed

Goldsmiths – Partnerships
- Creative Sector Forum/Development Group
- Deptford X
- Lewisham Challenge Partnership
- Art For Regeneration SRB
- Goldsmiths College Arts Building
- Culture And Urban Development Commission led by Charles Landry for the London Borough Of Lewisham

Thames Gateway creative and cultural industries dimension:
- Laban Centre New Building; Contact: Director Marion North
Major regeneration, infrastructure, skills development or business support with creative and cultural industries dimension:
- Deptford Creative Enterprise Zone (being examined, Andrew Carmichael is advising the borough, I speak for cultural development on Lewisham Challenge Partnership, the likely local strategic partnership)
- Art of Regeneration SRB (Jennie Harris, Royal National Theatre)
- Goldsmiths College Arts Building Development (through me)
- Laban Centre New Building (Director – Marion North)
- Convoys Site Development (44 Acres on river frontage – see Emma Peters, LBL)
- Private development at Deptford Bridge (Seagar’s Distillery Site – McDonald and Egan)

- Landry Commission – On Culture and Urban Development – For Lewisham Borough – Contact through Gin Dunscombe (Ginny.Dunscombe@Lewisham.Gov.Uk)

LBBBD – Partnerships and Projects
- Malthouse Cultural Industries Project (Barking Roding Valley SRB Partnership)(Contact Jeremy Grint/Victoria King)
A13 Artscape Project (Funded with £3.895 million from Arts Lottery (not cultural industries but would complement/have links with cultural industries in the borough) (contact Jeremy Grint 020 8227 2443/Claire Adams 020 8227 2161)

University of Greenwich – Partnerships and Projects
- The Thames Gateway consortium of the University of Greenwich and University of East London formed in 2000 to develop a proposal for HEFCE-funded prototype Foundation Degrees in Creative Industries. (document available) An Employers' Forum will be established as part of this project, although the substantive proposal was not funded.

- Within the University of Greenwich curriculum, the main skills development projects with a Creative and Cultural Industries’ dimension are:
  1. An on-line Certificate in CI at level 0 - due to commence in September 2001 (contact M.E.Alsford@greenwich.ac.uk)
  2. A BA (Hons.) Creative Industries - due to commence in September 2002 (contact S.Kennedy@greenwich.ac.uk)
  3. A number of established MA programmes in Heritage, Arts and Museum Management run by the School of Business.

L B Havering: Partnerships and projects
- The SRB project in Harold Hill has a brief to enable local people to set up self employment in crafts. Contact Sarah Millin 01708 375204
- Fairkytes Arts Centre in Hornchurch is our local arts and crafts centre where some crafts people have bases.
  - Best contact: LB Havering David Lawn ? 01708 432800

Projects:
- Theatre
- Fairkytes
- Night Clubs
- Cinemas
- Brewery Leisure Development
- Proposed museum

Lead contact for each of these: Sorry, don’t know.

APT:
- Our main partnerships are with Goldsmiths college. Lewisham college, DeptfordX and the Laban Centre London.
- We have also benefited from partnerships with Deptford City Challenge, Creekside SRB, Skillswork SRB, and various trusts and charities.

LVRPA: Partnerships and Projects:
- SRB programmes have helped to fund some elements of the industry e.g. media link from Soho to 3 Mills (Stratford and Temple Mills SRB Partnership).
- Other partnerships with University of East London, MEU, HAC and Ciss.
- Bow Back Rivers SRB and partnership investment at Three Mills (Workspace Ltd) have benefited Three Mills Studios, LVRPA (Nikki Christie lead officer) working with Tower Hamlets on film festival.
- Leaside SRB may have a role?

LB Tower Hamlets: Partnerships and projects:
- Cultural Industries Development Agency
- Borough departments: Housing, Community Partnerships, Regeneration, Social Services, Planning, Equalities, Parks, Youth Service, Lifelong Learning, Libraries
- Festivals Organisers
- Film Office
London Film and Video Development Agency
Arts organisations
London Education Arts Partnership
Association of London Government Arts Officers
London Arts
Tower Hamlets Regeneration Network
Tower Hamlets Summer University
Tower Hamlets Arts Forum
TH2000

Regeneration, infrastructure, skills development or business support:
London Borough of Tower Hamlets Regeneration: Jamie Ounan
Cultural Industries Development Agency: Mhora Samuels
London Borough of Tower Hamlets Community Partnerships: Paul Barlow
Account 3: Margaret Mukama
Tower Hamlets College: Annette Zera
TH2000: Margaret Sheehy
Leaside Regeneration: Michael Owens
Canary Wharf Arts and Events: Katrina Smith
Cityside Regeneration: Janet Poorman
SHADA: Maher Anjum
Bow Peoples Trust: Harbinder Kaur
ts2K: Justine Simons
London Borough of Tower Hamlets Cultural Strategy Lead Officer: Zoe Power
6. Baseline information

Greenwich Council:
Most of the available data is contained in the reports listed above, particularly the Draft Cultural & Creative Industries Strategy, and the GCC report on training and skills. Copies of all relevant material can be provided, some by e-mail, some in paper form.

The Council and its agencies are also commissioning a number of other studies which could provide useful data in the next 6-8 weeks, e.g. employment projections, business demand in west Greenwich and in the Objective 2 area. As and when this becomes available I will feed it in.

LETec:
LETec can provide borough profiles for all of the boroughs in the new LLSC area.

Newham:
- Thames Gateway Economic Strategy
- LETEC/LSC latest economic assessment document
- Newham Baseline Study

UEL:
- Labour market info - see www.letec.co.uk
- Previous TGLP economic strategy and related material
- Cluster reports on www.dti.gov.uk
- LSBU, Creative Energies, etc
- North London O2 area report done by Middx Univ. (Peter Sinclair of Haringey Arts Council is key contact, also for various projects which cover Hackney)

Zeppelin:
I do not have any stats, that is something you will get from each borough cultural and creative agent.

Dartford:
- Kent Thames-side Social Inclusion Study
- (P Hirst) have attached the summary of the annual Kent Thames Side Report. I can email the full report to you – *NOTE*: *Not received*
- (P Hirst) have some information that I can email relating to Dartford demographics and key indicators and indices of deprivation.

Goldsmiths:
- See The Fortifying Report

LBBBD:
- Contact: Chris Sale 020 8227 3921

University of Greenwich:
- See 4. Above

L B Havering:
- I suspect you need the planners to answer this questionnaire properly. Try David Lawn.

APT:
- See "Fortifying the Creative Sector" the report Derek Hillyer sent you. And Clare Coppers "Mapping the Creative Sector in Lewisham" - contact Gin Dunscombe 020 8314 6726 for copies
London Borough of Tower Hamlets
- Population (1997) 176,625
- Ranked 6 in 1998 index of most deprived local authority districts
- 40.1% of the population are from minority ethnic communities
- 14.46% have a long term limiting illness
- At least 17 languages other than English are spoken in Tower Hamlets schools
- 61% of households have annual incomes of less than £10,000

Reports:
- Tower Hamlets People and Profile (copy)
7. Agencies, companies and people

Greenwich Council:
- Cllr. Bob Harris, Executive Member for Regeneration. Contact direct.
- Council Officers:
  - UDP - Steve Tyler. 020 8921 5064. steve.tyler@greenwich.gov.uk
  - Tourism - Rosa D'Alessandro 020 8921 6282. rosa.dalessandro@greenwich.gov.uk
  - Marketing - Debbie Queiros 020 8921 2523. debbie.queiros@greenwich.gov.uk
- Regeneration Agencies:
  - Greenwich Development Agency - Ann Dufton, Director. Tel: 020 8921 3727
    E-mail: anne.dufton@greenwich.gov.uk
  - Woolwich Development Agency - David Candlin, Acting Programme Manager. Tel: 020 8921 2113.
    E-mail: david.candlin@greenwich.gov.uk
  - South Greenwich Regeneration Agency. Michelle de Broglio, Programme Manager. Tel: 020 8921 3456
    E-mail: michelle.dbroglio@greenwich.gov.uk
  - Greenwich Business Forum. Initial contact: Diane Cahill. Tel: 020 8921 2258.
    E-mail: businessforum@ukonline.co.uk

Greenwich - Key Cultural and Arts Organisations (contact details to follow)
- Blackheath Halls
- Greenwich Dance Agency
- Greenwich Theatre
- Greenwich and Docklands Festival
- Emergency Exit Arts
- Arts in Perpetuity Trust

LETLEC - Agencies, companies and people (See end summary)

LB Newham - Agencies, companies, people:
- John Davis – Newham College of Further Education 020 8257 4000 – Manages creative industries courses.
- Jon Harris – director Stratford Circus – 020 8279 1004
- Edwin Shirley – Three Mills Island Studios – 020 7363 0033
- Tom Fleming – Tower Hamlets Cultural Industries Development Agency
- Samee Mian - Green Street Creative Industries Marketing & Development Programme (Part of Newham College). 020 8257 4005.
- Nick Jones - Stratford Theatre Royal – 020 8534 7374.

UEL: Agencies, companies and people:
- John Lock in the first place.
- Course contacts via UEL prospectus.

Zeppelin:
- Talk to me (Tariq).

South East Arts:
- Debra Reay, Deputy Chief Executive, Director of Strategy & External Affairs, SE Arts
  Tel:01892 507219 E-mail: debra.reay@seab.co.uk
Goldsmiths - Agencies, companies and people
- Andy Clarke, Chief Executive, Lewisham Challenge Partnership (andy.clarke@lewisham.gov.uk)
- Jennie Harris, Head Of Training and Education, Royal National Theatre (Jharris@Nationaltheatre.Org.Uk)
- Hilary Renwick, Acting Head of (I think) Culture at Lewisham Borough (hilary.renwick@lewisham.gov.uk)
- Emma Peters, Head Of Development (I think) at Lewisham Borough (emma.peters@lewisham.gov.uk)
- Cllr Alison Mcgarrigle, Deputy For Culture, Lewisham Borough
Charles Landry will be accumulating a considerable amount of data for his Commission (via Gin Dunscombe ginny.dunscombe@lewisham.gov.uk)
I can suggest people at Goldsmiths, depending how deep you wish to go, including warden, business relations director, pro-warden, heads of creative arts departments.

LBBD:
As mentioned previously

University of Greenwich
Pauline Forrester, Business and Community Unit, University of Greenwich, Tel: 0208 331 8638

LB Havering:
Try David Lawn 01708 432800

APT:
- Talk to Andrew Carmichael

LB Tower Hamlets:
Ray Gerlach, Head of Leisure, 0207 364 4698
Cllr Ataur Rahman, Lead Member for Leisure, 7364 3248
Cllr Denise Jones, Lead Member for Equalities and Social Inclusion, 7364 4476
Jamie Ounan, Regeneration, 7364 4375
Paul Barlow, Community Partnerships, 7364 4981
Margaret Sheehy, TH2000, 7364 4836
Michael Owens, Leaside Regen, 8980 0111
Katrina Smith, Canary Wharf, Arts and Events, 7418 2009
Mhora Samuels, Cultural Industries Development Agency, 7247 4710
Margaret Mukama, Account 3, 8983 3761
Annette Zera, Tower Hamlets College, 7538 5888
Janet Poorman, Cityside Regeneration, 7377 5277
Maher Anjum, SHADA, 7780 7200
Harbinder Kaur, Bow Peoples Trust, 020 8983 7277
Justine Simons, ts2K, 0207 790 4242
Zoe Power, LBTH Cultural Strategy Lead Officer, 7364 4147
### 8. Events and other things for us to attend or review

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<thead>
<tr>
<th>Location</th>
<th>Details</th>
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<tbody>
<tr>
<td>Greenwich</td>
<td>None at present</td>
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<tr>
<td>LETEC</td>
<td>None that I can think of</td>
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<tr>
<td>Newham</td>
<td>-</td>
</tr>
<tr>
<td>UEL</td>
<td>DPA knows what I know!</td>
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<tr>
<td>Zeppelin</td>
<td>Skills works open-day for their CCI web portal, talk to Noel Campbell from Greenwich.</td>
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<tr>
<td>Dartford</td>
<td>After May: Dartford Festival on 21st &amp; 22nd July 2001 (approx. 50,000 attendees)</td>
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<tr>
<td>Goldsmiths</td>
<td>Creative Sector Forum at Goldsmiths, probably in April</td>
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<td>LBBD</td>
<td>none</td>
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<tr>
<td>University of Greenwich</td>
<td>n/a</td>
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<tr>
<td>LB Havering</td>
<td>Maybe Queen’s Theatre craft fair, Tel: 01708 456118.</td>
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<tr>
<td>APT</td>
<td>-</td>
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<tr>
<td>LVRPA</td>
<td>information to follow</td>
</tr>
<tr>
<td>LB Tower Hamlets</td>
<td>-</td>
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</table>
9. Deadlines

Greenwich Council:
UDP Review - Steve Tyler will have details of timetable.

LETEC:
The TEC Shuts on the 25/03/01, so from a personal point of view I am only in my current position until then. After that date I cannot guarantee whether I will be in a position to continue to provide help and support.

Newham:
Objective 2 2\textsuperscript{nd} March for proformas

UEL:
-

Zeppelin:
-

Dartford:
-

Goldsmiths:
-

LBBD:
-

University of Greenwich:
-

LB Havering:
-

APT:
\begin{itemize}
\item APT’s main revenue funding comes to an end in April with the winding up of Creekside SRB.
\end{itemize}

LVRPA:
-

LB Tower Hamlets:
-
ADDITIONAL NOTES:

LETEC End summary.
Where I can provide the greatest support is through the work that I am currently doing with some consultants to identify how the Learning and Skills Councils can best interact with the local Cultural & Creative Industries. I should have the first draft of this after the 15th Feb. I would suggest that, that would be a good point to have a more detailed discussion.

I have given the minimal answers possible here because the 9 points that you raise will all or are covered in some way or form through the work I am doing on drafting a hand-over paper. Once I have a final version of this we have the basis of a more detailed discussion.
Thames Gateway London Partnership Creative and Cultural Industries Strategy Bibliography

A Better Quality of Life, DETR, 1999
All Our Futures: Creativity, Culture and Education, NACCCE 1999
Banking on Culture, Banking on Culture, 2000
Bringing Britain Together, SEU, 1998
Business Clusters in the UK, A first assessment, DTI, 2001
Centre for Neighbourhood Renewal, DETR, 2000
Closing the Digital Divide, DTI PATEAM 15 report
Consumers Call The Tune: The Impact of New Technologies on the Music Industry, DCMS, 1999
Creative Energy; the creative industries in London’s economy, LDP and GOL, 2000
Creative Industries Internet Inquiry: Snapshot of A Rolling Wave, DCMS, 1999
Creative Industries: The Regional Dimension, DCMS, 2000
Creative Skills; skills for London’s creative industries in the digital age, LDP and LSFU, 2000
Culture and Creativity, the next ten years, DCMS, 2001
Culture and the City: 10 ways to make a difference, CPfL, 2000
Design in Britain, Design Council (? Date)
Draft Spatial Development Strategy, LDA, 2001
Eastern Promise, ed Butler, Lawrence and Wishart, 1999
Ethnic Capital, Shaping London’s Local Economies, LSFU, 2001
Living in Urban England, DETR, 2000
Media in London, London First, (? Date)
Opportunity for All in A World of Change, DTI and DFEE 2001
Our Towns and Cities, the future delivering an Urban Renaissance, DETR, 2001
PAT Team 10 Report on sport and Arts, SEU/DCMS, 1999
Promoting the World City, 2000
Regeneration and the Premises Crises, Vision in Art, 2000
Rising East 1.1, 3.1 UEL
Skills for the Information Age, DFEE
Thames Gateway London Economic Strategy (Draft), TGLP, 2000
Thames Gateway Regeneration Zones of Changes MCA Regeneration 2001
The Independents, Britain’s new cultural entrepreneurs, Leadbetter and Oakley, DEMOS, 1999
The London Study, ALG, 1998
The Mayor’s Transport Strategy, January, 2001
The Social Investment Taskforce, DTI October 2000
The State of English Cities, DETR, 2000

Documentation provided by Local Authorities and TGLP CCI Task Force Partners is referenced in Appendix 2
<table>
<thead>
<tr>
<th>CCI Task Group</th>
<th>Designation/Team</th>
<th>Organisation</th>
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<tr>
<td>Andrew</td>
<td>Carmichael Development Coordinator</td>
<td>Art in Perpetuity Trust</td>
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<td>Sarah</td>
<td>Purvis City Fringe</td>
<td>City of London</td>
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<td>Odele</td>
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<td>Derek</td>
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<tr>
<td>Alan</td>
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<td>Aileen</td>
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<tr>
<td>Jane</td>
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<tr>
<td>Tariq</td>
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<td>Alice</td>
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<tr>
<td>Roy</td>
<td>James CCI Officer</td>
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## Appendix 3: Consultees

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<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Organization</th>
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<tbody>
<tr>
<td>Ravinder Dhanjal</td>
<td>Regeneration Officer</td>
<td>LB Waltham Forest</td>
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<tr>
<td>Danny Zammit</td>
<td>Corporate Director</td>
<td>LB Redbridge</td>
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<tr>
<td>Lesley Seary</td>
<td>Arts Officer</td>
<td>LB Redbridge</td>
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<tr>
<td>Kate Draper</td>
<td>Arts &amp; Leisure</td>
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<td>Jacqueline Eggleston</td>
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<td>Meril Morgan</td>
<td>Arts Officer</td>
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<td>John Alexander</td>
<td>Leisure Development Manager</td>
<td>LB Redbridge</td>
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<tr>
<td>Paul Weiss</td>
<td>Economic Development Officer</td>
<td>Thurrock District Council</td>
</tr>
<tr>
<td>Richard Hatter</td>
<td>Senior Planner</td>
<td>Thurrock District Council</td>
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<tr>
<td>Liz Jones</td>
<td>Regeneration Manager</td>
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<td>Mary Ann Connolly</td>
<td>Arts Development Officer</td>
<td>Thurrock District Council</td>
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<td>Pal Luthra</td>
<td>Principal Regeneration Officer</td>
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<tr>
<td>Lucy McMenemy</td>
<td>Arts Catalyst Forum</td>
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<tr>
<td>Michelle Guimarian</td>
<td>Community &amp; Leisure</td>
<td>LB Hackney</td>
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<tr>
<td>Charlotte Grace</td>
<td>Arts &amp; Culture</td>
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<td>Ryan McDade</td>
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<td>Harriet Atkinson</td>
<td>Arts and Leisure Officer</td>
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<tr>
<td>Clare Cooper</td>
<td>Development Director</td>
<td>Arts &amp; Business</td>
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<tr>
<td>Gail Cohen</td>
<td>Director, Marketing</td>
<td>Business Link London</td>
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<tr>
<td>John Newbigin</td>
<td>Head of Public Affairs</td>
<td>Channel 4</td>
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<td>Tom Fleming</td>
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<tr>
<td>Marion Royer</td>
<td>Director</td>
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<tr>
<td>Rosy Greenlees</td>
<td>Cultural Strategy Officer</td>
<td>GLA</td>
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<tr>
<td>Graham Hitchen</td>
<td>Acting Head of Culture</td>
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</tr>
<tr>
<td>Tim Freathy</td>
<td>DCMS Rep</td>
<td>Go-East</td>
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<td>Lesley Fraser</td>
<td>DCMS Rep</td>
<td>GOL</td>
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<td>Mark Crane</td>
<td>Clusters programme</td>
<td>LDA</td>
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<tr>
<td>Holly Donagh</td>
<td>Strategy Officer</td>
<td>London Arts</td>
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<tr>
<td>Joyce Wilson</td>
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<tr>
<td>Dieneke Ferguson</td>
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<td>Mazorca</td>
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<td>Paul Owens</td>
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<td>New Media Knowledge</td>
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<tr>
<td>Debra Reay</td>
<td>Deputy Chief Executive</td>
<td>South East Arts</td>
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<tr>
<td>Raj Patel</td>
<td>Strategy Officer</td>
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<tr>
<td>Tim Williams</td>
<td>Chief Executive</td>
<td>TGLP</td>
</tr>
<tr>
<td>Cllr Bob Harris</td>
<td>Chair</td>
<td>Tour East</td>
</tr>
</tbody>
</table>
### FILM
- **Daniela Kirchner**  
  London Film Commission
- **Rebecca Maguire**  
  LFVDA
- **Annabel Roberts**  
  The Lux

### DANCE
- **Brendan Keaney**  
  Greenwich Dance Agency
- **Kiki Gale**  
  Director  
  East London Dance
- **Niki Bowes**  
  The Place Dance Services
- **Martín Bowes**  
  Akademi
- **Linda Jasper**  
  Director  
  South East Dance Agency
- **Nikki Tomlinson**  
  Marketing Administrator  
  Chisenhale Dance Space
- **Sheryl Pierce**  
  Administrative Manager  
  Chisenhale Dance Space
- **Deborah Thomas**  
  Development Officer  
  Chisenhale Dance Space
- **Roswitha Chesher**  
  Finance Administrator  
  Chisenhale Dance Space
- **Veronica Jobbins**  
  Laban Centre

### VISUAL ARTS
- **Fiona Furness**  
  Studios Manager  
  SPACE
- **Nicola Reeves**  
  Visual Arts  
  London Arts
- **Aileen Ryan**  
  Vision in Art
- **Lucy Day**  
  Arts Training Coordinator  
  Space Place
  Acme
  AAVAA
- **Margaret McLeary**  
  Information Services  
  AXIS
- **Sally Freeman**  
  Reference Library  
  Crafts Council