

“DEPTFORD/GREENWICH CREATIVE HUB” A FRAMEWORK DOCUMENT



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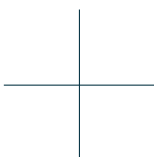
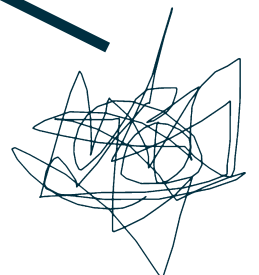
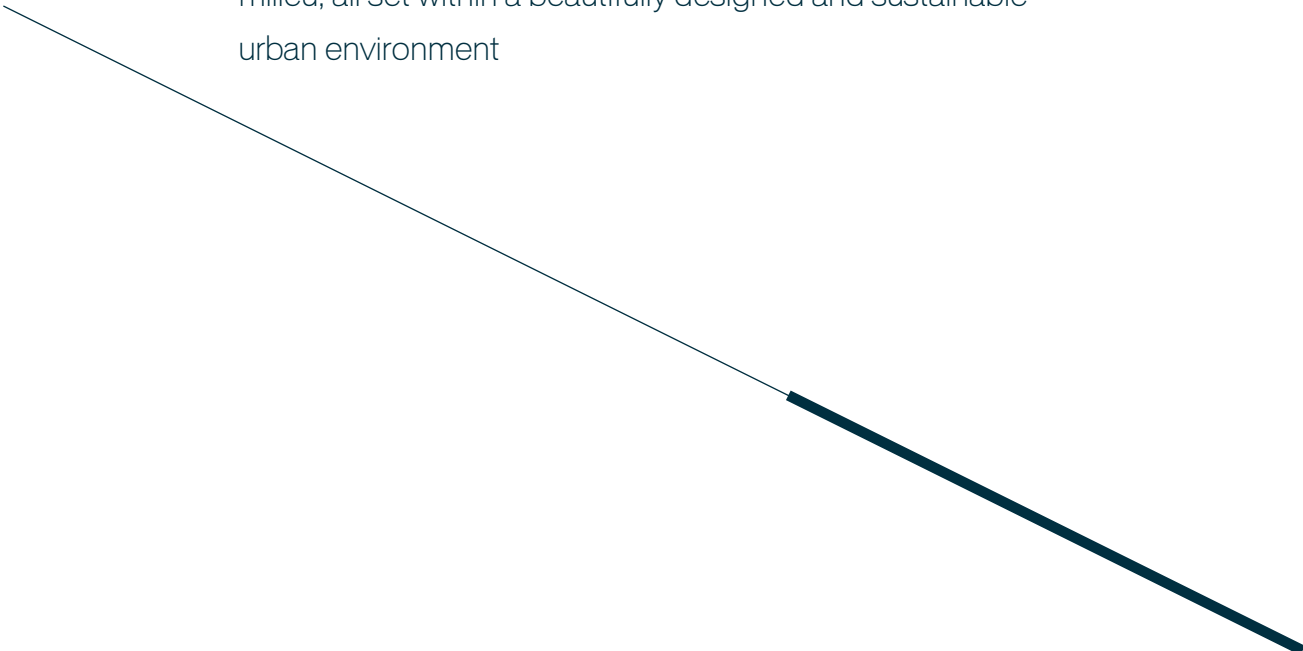


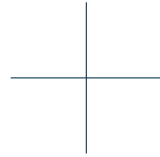


DEPTFORD/GREENWICH HUB

A VISION

Putting **culture, creativity and creative enterprise** at its heart, the Deptford /Greenwich Hub project aims to significantly improve the economic fortunes and social wellbeing of all those living, working or studying within its boundaries, via the implementation of a focused long term economic development strategy. Delivering over the next 10 years London's most successful cluster of creative industries, surrounded by a vibrant cultural and creative milieu, all set within a beautifully designed and sustainable urban environment





1. CREATIVE LONDON / CREATIVE HUBS

THE NEED FOR A VISION

In April 2004 the London Development Agency (LDA) launched an initiative called Creative London. This project forms part of the wider group of projects the LDA is bringing forward in order to address the priorities of the Greater London Authority's Economic Development Strategy. The EDS in turn forms part of the GLA's 'family' of strategies and plans, which will crucially inform the way the capital is directed and governed over the next ten years.

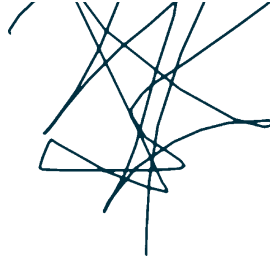
Creative London's aim is quite simply, **to grow the creative sector in the Capital**. One of the primary mechanisms by which they intend to achieve this goal is by establishing a network of 10 Creative Hubs throughout London.

The area of Deptford/Lewisham/Greenwich (please see inside cover for map of the Hub area) has been selected as one for the establishment of a Creative Hub. This paper and the consultation process that goes along with it will be used to select the strategic priorities for this Hub as well as to decide its shape and the range of projects it will support. Central to this journey is the formulation of a clear strategy and an action plan. One that will result in an effective alignment of all of the Hub's existing assets towards the realisation of a clear achievable vision; one which has the broad support of the partners who live, work and study within the Hub area.

Although the formulation of the strategy has been prompted by the LDA/Creative London project, it should not be seen as just an application for funds to that initiative. The strategy must have a wider ambition, looking to marshal all possible available resources. These might include all public money, private investment, advantage through "joined up thinking" and of course the value of the Hub area's existing assets which includes the community's knowledge, skill and ambition as much as any building or fixed plant. Only with plans of this wider scope will the Hub become instrumental in realising the full potential of all its communities, its location and assets.

In an influential paper titled "Strategic Intent" published by the London Business School in 1989, G. Hamel and C.K. Prahalad argued that **"successful companies have ambition out of all proportion to their market position and have commitment to change the rules of the game"**. The Deptford / Greenwich Hub will not of course be a commercial company as such (although it will include many commercial enterprises). But **"ambition out of all proportion to its market position"** seems to characterise much of the work that has gone on in the area over the recent past and **"a commitment to change the rules of the game"** may give us a lead as to the way forward.





2. PURPOSE OF THIS DOCUMENT

This is a consultation and a framework document. It is intended to be used as an aid to the process of producing a strategy and investment plan for a Deptford/Greenwich Creative Hub. It is not a fixed document, it is meant to frame and stimulate discussion amongst the partners during the consultation process, rather than be seen as a final or completed plan. We really do want the input of all the partners, both for the value of the ambition and thinking but also for the "buy in" factor.

The back pages of the document provide space for you to add your own ideas and comments - please take the opportunity to do this, leave your comments at the meetings or send them in to the CLA. All comments will be recorded and used to inform the final plan. Extra comment space is also available on the CLA web site.

This first section should be read in conjunction with Part Two, Tom Fleming's paper (**The baseline economic position of the Deptford/Creekside Creative London Hub: Exploring the Spaces of Creative Collaboration**) which gives an account of the baseline economic position of the creative sector in the proposed Hub area.

Please also add any comments you have on the accuracy of the baseline paper, which quite openly describes the difficulty of obtaining robust data on the creative sector. Individual perceptions from those working the area are an additional and very valuable guide. After stage one of the consultation meetings, a draft strategy will be circulated for comment. This will also be tested at a larger "Open Space" Creative Network event, after which a final version will be submitted to the London Development Agency's Creative London team.

3. CONSULTATION PROCESS AND TIMEFRAME

Towards the end of this document is a proposed list of the constituent creative industries sub-sectors including commercial and not for profit organisations who will be consulted as part of the strategy writing process. This document will be used as a starting point for all of those meetings. In addition to this document, all the background material being used to inform the writing and research process will be made available on the Creative Lewisham Agency web site

(SEE WWW.CREATIVELEWISHAMAGENCY.ORG.UK/HUBDOCS).

This mini site includes a large (and growing) number of reports, market analysis, papers and web site links. Please feel free to forward any other material that you would like us to add.

Some of the consultation meetings will be conducted on a one to one basis but most will be larger group ones arranged around the four main themes of the Creative London project:

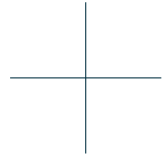
TIME FRAME

The LDA / Creative London would like the strategy to be finished and submitted to them by the middle of March 2005. This might seem like a short timescale to write and consult with so many people on all the details of such a potentially complicated plan. But the Creative Lewisham debate has already been going on for three years now, so the process is not starting from scratch. In addition the Creative Network has been meeting for over a year and has been pivotal in framing the important issues as well as building up the network of contacts. It is also inevitable that part of the actual Hub delivery work will include proposals for ongoing research and development. The Creative London program is seen by the LDA as being a 10 year one, so plans need to have the capacity to be able change and adapt to be built into the project from the outset.

TALENT / ENTERPRISE / PROPERTY / SHOWCASING

Chairs for each of these theme groups will be drawn from the executive of the Creative Network. After the theme meetings a first draft of the plan will be circulated and discussed at a large "Open Space" meeting for revision before being submitted to the LDA.





4. INCLUSIVITY

If you read this document and you feel an individual you know, or group or a business should be on the consultation list then please email the CLA to get them added to the list.

5. WHAT IS THE LDA / CREATIVE LONDON DEFINITION OF A HUB?

Creative Hubs are part of the LDA/Creative London initiative (see www.creativelondon.org.uk for more details). The LDA intends to have a network of 10 Hubs up and running by the end of the program. The Hubs will be the locally based strand of the Creative London program providing links to the more specialist pan-London services that Creative London Central will provide, such as the intellectual property advice service OwnIt and access to venture capital programs, as well as others yet to be announced.

We are one of the first areas to be invited to put together a strategy for Hub development. And we should be one of the first Hubs to begin full operation. This is a great tribute to the work of all the individuals, businesses, institutions and groups who work within the defined Hub area. It is a great tribute not only to what has been achieved already but also to the potential for even greater achievements in the future.

The term Hub in some ways may be unhelpful in that it conjures up ideas of a single central location or just one key building. There are obviously already lots of "Hub type" activities happening in the Deptford/Greenwich area. The establishment of some new buildings or business incubation facilities may be appropriate to Hub development, but the parachuting in of any such establishment without due regard to existing organisations and programs just will not work. The power of the Deptford/ Greenwich Hub will come from the alignment of joint ambition, the filling of provision gaps, the showcasing of existing gems and in local supply chain building. This strategy is in the first instance a response to the LDA Creative London program, but to be really effective it must fully involve the private sector in a meaningful way as well as target all other relevant agencies and organisations. We will know when we have a good strategy when it achieves 'buy in' from all parties, the private sector, the local authorities and all the other Hub partners. Alignment is key - win /win is a good litmus test for any part of the project.

It may be better to think of the Deptford/Greenwich Hub as a 'creative zone', a 'quarter' or a 'village'- see the area map below for boundary details. The spatial metaphor of the Hub as the centre with spokes radiating out, may be more usefully interpreted as a virtual one. Located in the Hub's Centre is the strategic purpose of the whole initiative (**grow the creative sector**) with the spokes being the different businesses, projects and initiatives that contribute to the achieving of that aim. Another way to look at Hubs is using the ecological analogy. Successful Hubs will be areas that provide all the appropriate nutrients for creative enterprise growth, as well as achieving the sort of positive strategic alignment between partners that helps all the separate elements to produce joint results well in excess of their individual capacities.

The ecology of a creative area can be developed as a metaphor. Creative industries make their products (i.e. music) in an area and that product is often consumed in that same area (i.e. a music venue). There is therefore an intimate connection between what is made in a locality and how it is consumed. The quality of the place will have an immediate effect on the quality of the experience of the product being consumed, which will in turn have further effects on the production of even more product. This virtuous self-reinforcing circle is the 'Holy Grail' of creative industry development. Such a phenomenon is easy to over-analyse and hard to capture. In the end it often more recognised as the feeling of an area, it is the sum of the people who are attracted to it. We all have favourite "creative" places, ones that appear to be more than the sum of their parts. Strangely it is often easier to identify places that once had that feeling, Soho used to feel like that for music; Hoxton had it's art "cool" period; bits of Brighton seem to maintain that mysterious quality. The ecological complexity of how successful creative places operate has been the subject of many plans and analyses. There is no one tried and tested way to create such a place, such a milieu. But there is much material we can draw on and I would encourage readers to look at some of the papers and strategies that can be found currently collected on the CLA web site and use those to inform this process.





6. WHAT IS THE CHALLENGE OF BEING A HUB?

Creative London is an initiative coming from the LDA, which is the Regional Development Agency for the Mayor of London, charged with regeneration and economic development. Creative London is at its base an economic regeneration program. It is however less prescriptive than previous regeneration initiatives, such as SRBs, in as much as it leaves it fairly open to the different Hubs how they achieve the central objective of **growing the creative sector**. In broad terms, if a Hub can reasonably justify a direction or project as contributing to the achievement of their overall aim, and it can be demonstrated that it has synergy with the other strands of the strategy, then it can be considered.

Growing the sector means economically in terms of total sector turnover, numbers of businesses and jobs but also in terms of influence and image as well as in terms of social importance through its educational and socially inclusive beneficial

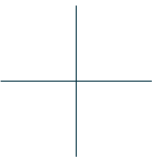
effects. In broad terms Creative London seeks to increase the turnover of the creative sector in London from £21 billion to £30 billion and to see employment go from 500,000 jobs to 750,000, over the next 10 years. See www.creativelondon.org.uk/programme.php. Also see the GLA economics document **“Creativity: London's Core Business”** for a full analysis of the different sub-sectors' contribution to this total economy.

Initiatives as diverse as tourism, education, business support, improvements to the urban realm, economic intelligence research, small grant programs, art exhibitions, networks, tourism projects, public relations work etc. etc. can all be considered. The key is the way they reinforce each other's effectiveness and also contribute to the growth of the creative sector in the Hub area as a whole.

What are the basic services that each Hub will have to deliver?

The LDA/Creative London framework lays out some basic objectives for all the prospective Hubs. They must make sure that a basic integrated delivery of certain complementary services is provided. Ones that all contribute to the central aim of growing the creative sector. Most of these will be provided by existing partners in the Hub area; some are already being delivered and some additional services will need to be piloted. The LDA has asked for Hub plans that include some common elements:

- The Hub should be the first stop for information on Creative Sector business support
- The Hub should ensure that an initial business diagnostic service is available for all creative sector start-ups
- It should be able to direct people to intensive, sector-specific business support and pilot support initiatives if such support is not already available.
- It should have strategies in place that nurture emerging talent
- It should facilitate a local network - one which also provides links to broader regional, national and international networks
- The Hub should ensure enterprise skills are widely available
- The Hub should aim to develop business competitiveness
- The Hub should provide access routes to private and public funding
- The Hub should maintain a database of demand and supply of locally available workspace and run a matching agency service
- It should provide links to industry and higher and further education
- It should do this for the full spectrum of Creative Sector activity
 - commercial
 - not for profit
 - large
 - small
 - Part time
 - Full time
- And it should aim to ensure equality of opportunities to all members of the Hub area's population, helping to overcome traditional disadvantage experienced by some members of the community such as BME communities, young people and women entrepreneurs.



9. WHAT IS A STRATEGY?

In the context of developing this Hub plan we define strategy as:

The setting of long term goals and objectives, the determination of courses of action and the allocation of resources to achieve those objectives

In addition to any LDA funding that may come from this bid, it is important to emphasise the advantages for the sector that can be gained from having a well researched and widely consulted strategy in place. Sectoral alignment can be used to influence things such as other's strategic policy direction and spatial planning frameworks. The benefits that come from the strategic alliance of the sectors' ambitions should in the long term result in investments whose value will outweigh any funding that is won through this process.

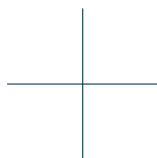
Other advantages of good strategy include:

- Creation of a positive agenda - **“successful companies have ambition out of all proportion to their market position and have a commitment to change the rules of the game.”**
- Good strategies aggregate ambition - making sectors and trends visible to policy makers
- Good strategies also aggregate ambition in a way that can make an area or a sector attractive to larger players - bringing in more private sector investment, employment opportunities and raising the area's profile
- Good strategies can help stimulate innovation and growth - **“recombinant innovation - the best product ideas are hatched by collaboration, not soloists”** - networks are key
- Good strategies provide a framework for mutual advantage - joint working as a way to lever competitive advantage
- Good strategies can create market advantage by identifying local supply chain opportunities

Michael Porter talks about good corporate strategy as:

THE ESSENCE OF STRATEGY IS DEFINING HOW A COMPANY IS UNIQUE AND HOW IT WILL DELIVER A DISTINCTIVE MIX OF VALUE - STRATEGY IS ABOUT ALIGNING EVERY ACTIVITY TO CREATE AN OFFERING THAT CANNOT EASILY BE EMULATED BY COMPETITORS.

Our Deptford/ Greenwich Hub strategy and plan could beneficially use such ideas.



10. STRATEGIES THAT HAVE WORKED ELSEWHERE

In the USA both Austin, Texas and Memphis, Tennessee have realised that they have a history of attracting creative people and sought to build on that advantage.

- **Create places that are talent magnets and have 'thick' labour markets**
Access to talented and creative people is to modern business what access to coal, limestone and iron ore was to steel-making. Cities that score high on the Diversity Index attract talent.

- Prof. Richard Florida, Heinz Professor of Regional Economic Development at Carnegie Mellon University.

Create thick labour markets because talented technology workers want to live in places with a 'thick' labour market, i.e. one with many attractive employment options.

- **Create places that know why they are special and let everyone else know as well**

Austin (Texas) sponsors the 360° Summit, to encourage artists, entrepreneurs and technology workers to get to know each other and share their work.

Austin has developed a network of government and business services to support a robust music industry. There are 120 live music venues in Austin, plus a base of lawyers, managers, recording studios, booking agents and publishers serving musicians. Government-backed loan programs and seed money are available to local artists, who can apply through the city's 25-year-old Cultural Contracts Program, a \$3.9 million annual provision financed by a hotel tax. A rental car tax and 15 percent of the hotel tax go to the arts in Austin. Austin City Limits started airing on PBS in 1976, - it branded itself as the "Live Music Capital of the World."

Its current strap line is "Keep Austin Weird"

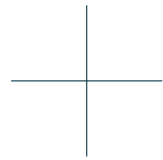
- **Create places that embrace, encourage and celebrate innovation and technology**

Several new media specific business incubation projects have achieved success despite not being in what are traditionally thought of as "Hot" areas.

Kirklees Media Centre in Huddersfield, West Yorkshire is a great success, providing a mutual support network for start-up new media businesses and artists. Despite being in a place that has lots of cheap unlet business space, it achieves a high occupancy rate whilst charging above local market rents. The tenants obviously find value in locating themselves in a recognised centre. Silicon Alley in Newcastle encourages innovation by providing access to a very high-speed data network and other ICT services. Brighton Media Centre has achieved similar success.

There are many other examples of successful strategic initiatives on the CLA web site.

Only bold partnerships among business, government, and non- profit sector can bring about such change. No one organisation operating alone can realise this vision.



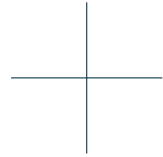
11 . BASELINE POSITION

Local Context

a. Boundaries

The proposed Hub boundaries form a distended triangle created by the three corner points of the New Cross NDC, Greenwich University and Convoys Wharf (see map). It is proposed that the Hub boundary will be kept soft, so as to define the core area but not arbitrarily exclude potentially beneficial projects. It is proposed that capital development projects will only happen within the Hub boundary but that Hub services will be available to all residents of the two boroughs of Greenwich and Lewisham.





b. Size and shape of local economy

Tom Fleming Consultancy with the assistance of Alan Freeman from GLA Economics, Deptford/Greenwich City Growth Strategy and the LDA have produced an initial baseline position paper - see Part Two of this paper. Assessment of the size of an existing economic sub-sector, such as the Creative Industries, one that includes many sole traders and new start-ups as well as many who work part time and in more than one occupation has always been difficult.

As part of a wider exercise, Tom Fleming has been engaged by Creative London/LDA to try and establish a consistent methodology for estimating the size of the creative economies in each of the 10 Hub areas. He is also developing a method of estimating the relative importance of each of the major sub-sectors (taken from the DCMS 13 sub-sectors of the creative economy). We are very pleased to be able to use his knowledge for our Hub.

This work is also being informed by the DCMS DET toolkit (see CLA web site) and their desire to get each RDA to develop generic regional frameworks (regional observatories) that will be used to inform investment decisions.

In addition to assessing the existing data, we are also trying to identify those sectors with the greatest potential for growth, both locally through established activity and position within existing supply chains but also mapped nationally and internationally onto wider patterns of growth within the creative industries as a whole. This sort of market opportunity spotting is obviously key to the shaping of a strategy for growing the overall creative economy within the Hub area.

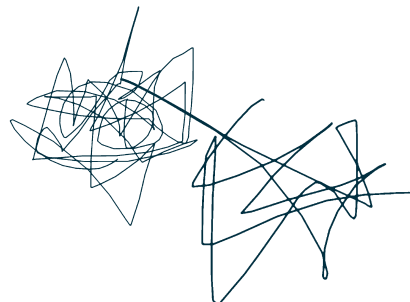
In addition, the baseline information and the strategy will be used to help the Hubs work in a complementary way across the capital and allow collaboration between the other Hub areas. It will also make access to the centrally delivered LDA/Creative London services easier.

c. Deptford/Greenwich Hub area

Below is a graph of the relative importance of the sub-sectors by number of companies. This is an initial position and, as Tom Fleming says in his paper, needs to be refined. It is to be remembered that the object of the Hub initiative is to aim for growth within the sub-sectors with the greatest potential for growth and those which have the best local complementary fit. Therefore it is not always the largest sector that needs to be focused on most. Issues of return for invest on money and time and tie in with other local and regional strategic initiatives (i.e. the Thames Gateway) need to be carefully considered.

The graph and tables below offer a brief overview of Tom Fleming's paper **The baseline economic position of the Deptford/Greenwich Creative London Hub: Exploring the Spaces of Creative Collaboration.**

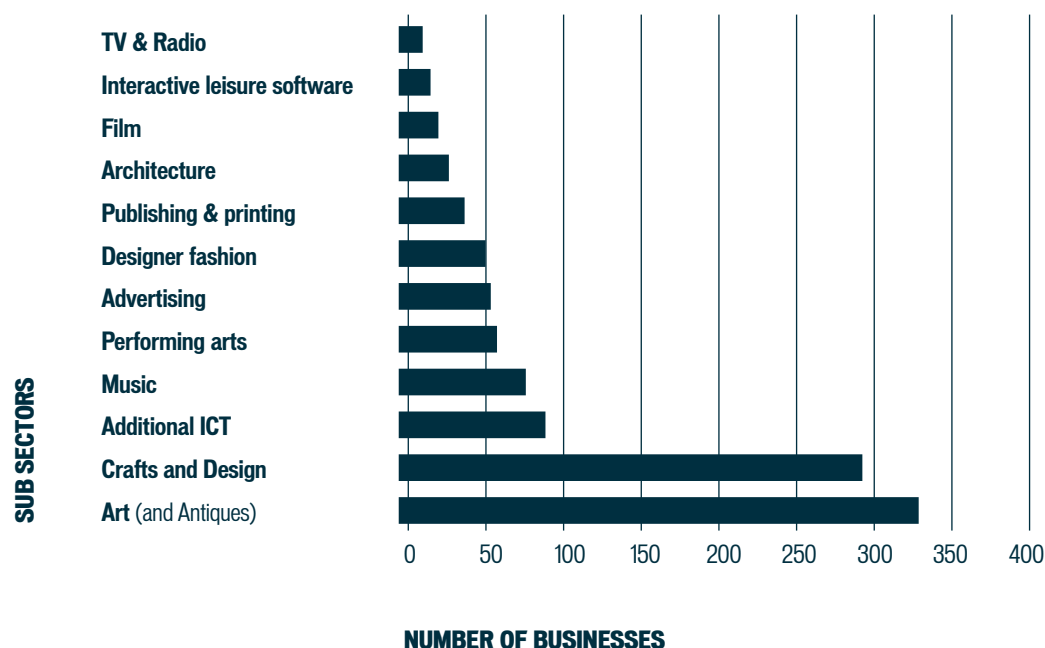
For more information, please see Part Two of this document.





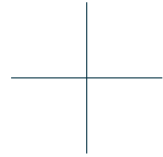
Relative size of sectors by numbers of businesses

Relative size of sectors in Deptdord/Greenwich hub area



Snapshot of the current state of each sector

Art (and much less so Antiques)	Large numbers, profit growth potential uncertain
Crafts and Design	Strong, diverse though underachieving
Additional ICT	Low creative content origination
Music	Great opportunity to bring the underground scene into the business mainstream
Performing Arts	Major assets, high levels of participation, insufficient small business growth
Advertising	Emergent, locally oriented, under-developed accounts
Designer Fashion	Small, hidden, emergent
Publishing and Printing	Large sub sector, unconnected to creative producers
Architecture	Huge potential, current under-development
Film	Lacking infrastructure, poorly networked
Interactive leisure software	Potential high growth, current low profile
TV and Radio	Very small, little cross sub sectoral integration



d. Job numbers

Tom Fleming's paper uses a number of ways to arrive at an estimation of the sectors' total job numbers, using both existing data sets and other extrapolation methods. (Readers may be interested to know that using raw data from the main current industry standard database reveals that there is no creative sector in the proposed Hub area at all – a conclusion that obviously flies in the face of any on the ground experience!).

JOB TOTALS FOR CREATIVE INDUSTRY SECTORS

Total of the sub-sectors	8,846
+ Proportion of Goldsmiths College staff	150
+ Proportion of Greenwich University staff	200
+ Laban staff	50
+ Proportion of Lewisham College staff	50
Current estimated total	9,296

e. Turnover - Gross Value-added

For a more detailed explanation of how this has been calculated, please see Tom Fleming's paper.

Numbers of CI businesses / organisations	1,055
Extrapolated numbers of jobs	9,296
Estimated average salary per person	£18,000
Total GDP for the Creative Sector of Deptford / Greenwich Hub area	£167,328,000

This is more likely to be an underestimate than an overestimate and easily represents an economy turning over **£160** million annually. Small in comparison to London's Creative Sector economy, estimated at being worth £21 billion, but significant relative to other economic sectors active in the Hub area and, most importantly, one that would seem to be in a very good position to grow.

f. Relevant important local assets

Venues and Localities

Below is a partial list of some of the Hub areas existing assets – the consultation process will be used to build this list further.

BUSINESSES

Cog Design
Raw Nerve
Gallop / Committee
BPTW
Source Communications
+ over 1,000 others

HE / FE INSTITUTIONS

Goldsmiths College - University of London
Greenwich University
Laban - contemporary dance school
Trinity College of Music
Community Education
Lewisham
Greenwich Community College

EVENTS

Greenwich and Docklands Festival
DeptfordX
Deptford Design Festival
NDC Youth Arts Festival

NON-FORMAL TRAINING AND SUPPORT PROVIDERS

Midi Music
Art of Regeneration / Albany
Head for Business
Second Wave
Cockpit Arts

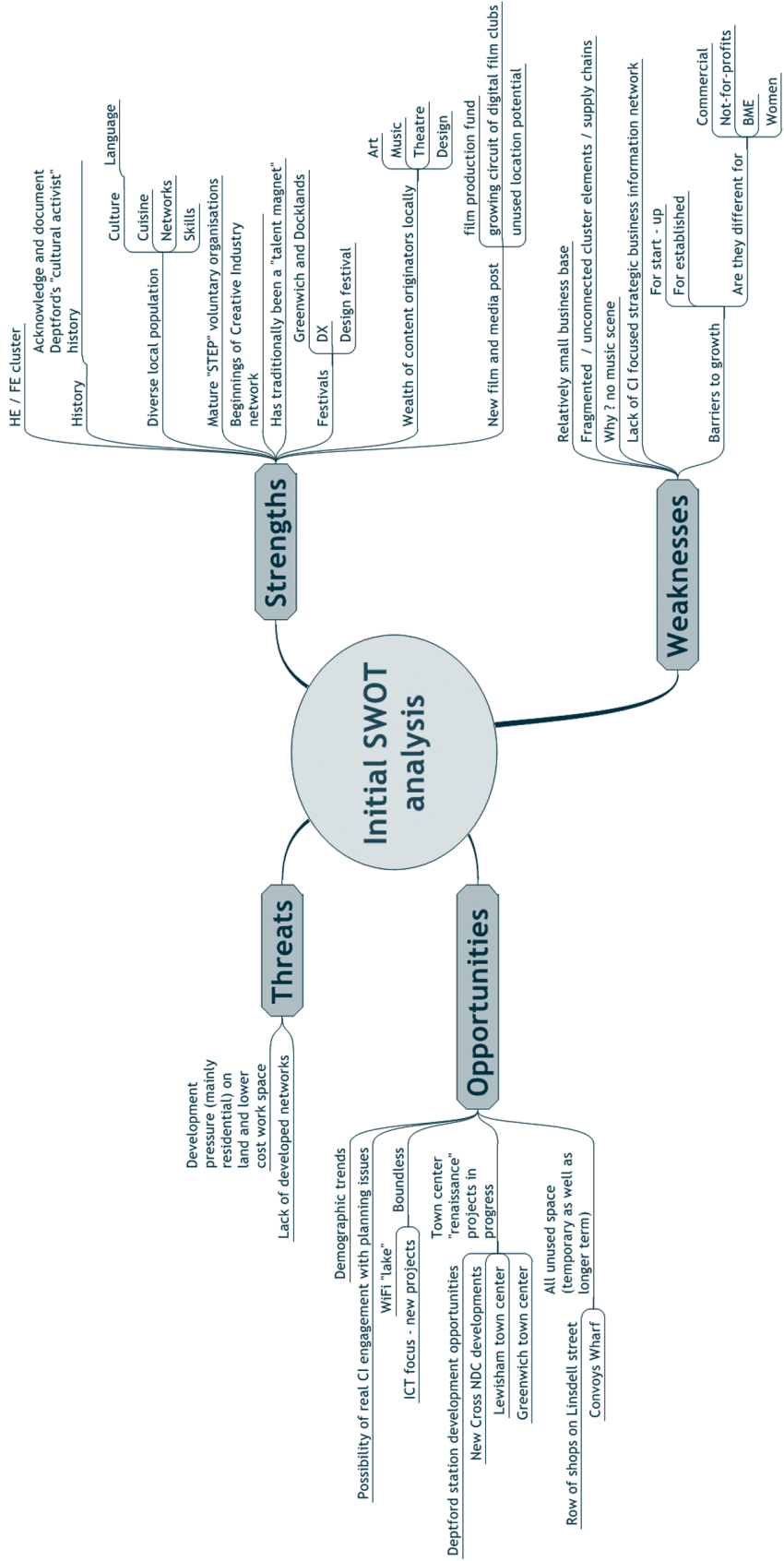
PERFORMANCE VENUES AND GALLERIES

Greenwich Theatre
Albany Theatre
Laban Theatre
Museum of Installation
APT gallery
Bear Gallery
temporarycontemporary
Framework Gallery

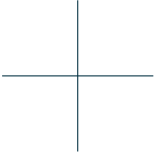
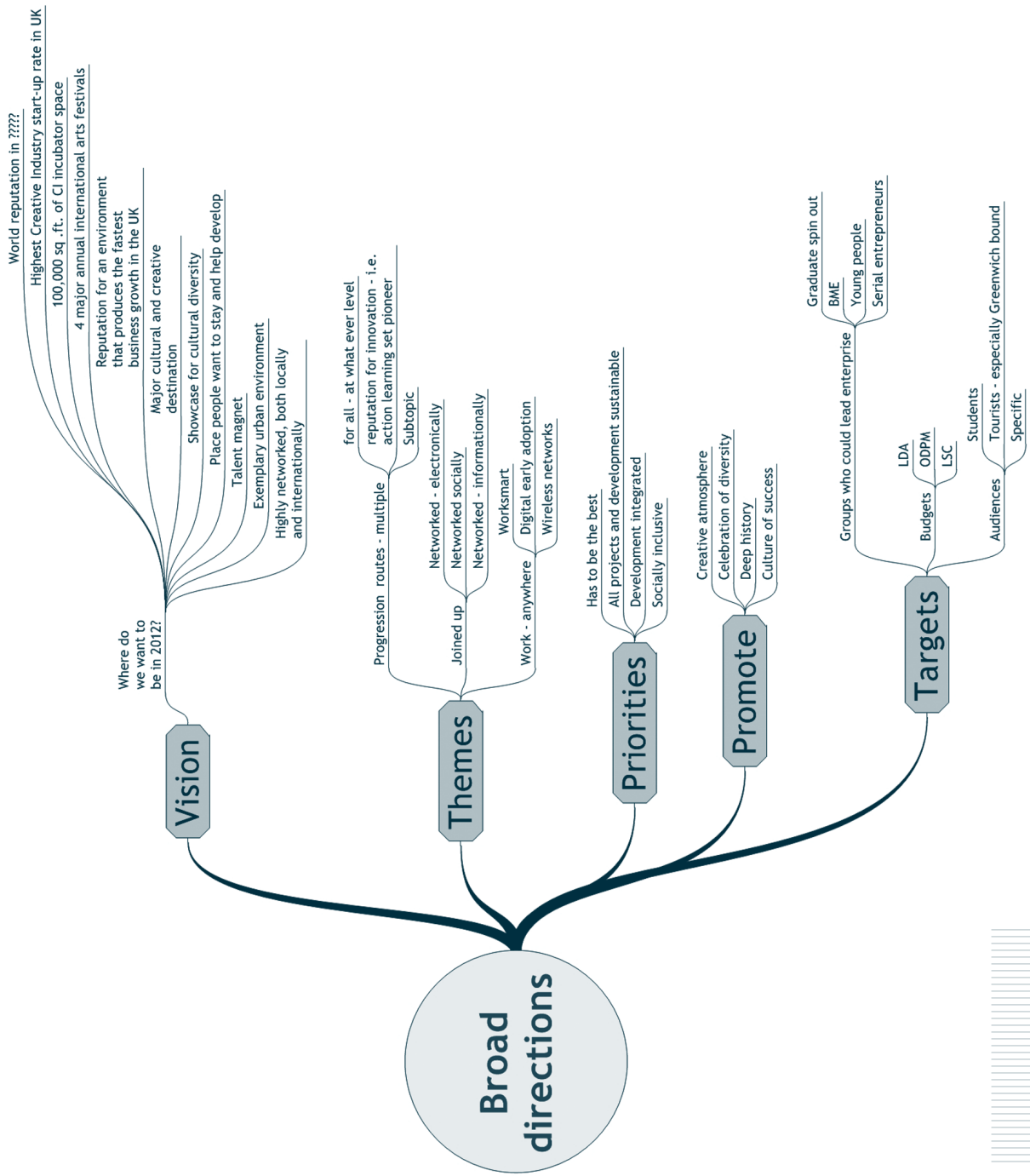
The LDA has also asked us to identify how they can best be involved in the investment plan. We will endeavour to ascertain this during the consultation process.



12. INITIAL SWOT ANALYSIS



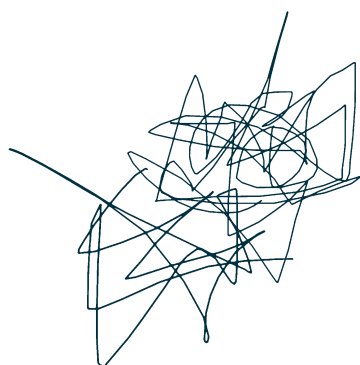
13. BROAD DIRECTIONS

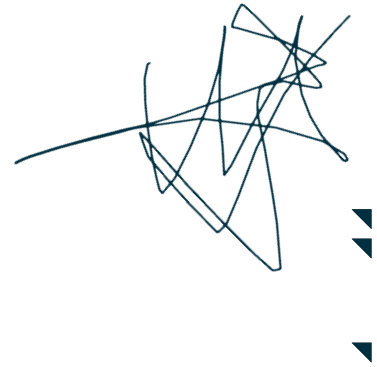


14. IDEAS FROM FIRST HUB MEETING

The Creative Network held an initial creative Hub consultation event at the Laban in November 2004. Some of the ideas from that meeting are recorded below:

- Existing progression routes through education training and business support - good but needs to be mapped and links between them improved
- Transport as a vital audience development tool - this is one of the areas that the Hub strategy needs to become involved in
- Stateside area examples e.g. Soulsville - an arts and culture experience tourist venture could be explored
- All area planning should include Creative Industries skills and views
- Area signposting is crucial - we should be bold looking for a scheme that is interactive and place creating, as well as being informative
- Signage needs to provide places for temporary event announcements, such as banner holders on lampposts
- Marketing infrastructure - the creative industries in the Hub area need to develop joint initiatives based the strengths of their location
- Evening economy - the creative industries need to work with the food, drink and retail sector to promote the area as a destination with a range of attractions
- Restaurants - more linked into events
- Bars as art destinations
- Clubs - new types
- Should Brockley be included in the area?

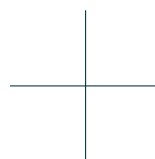
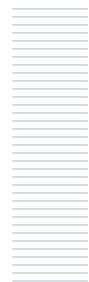




15. OTHER PROPOSALS

At the end of section 5, are some of the common services that the LDA expect all 10 Hubs to provide. Others which have been suggested to the CLA or which have come to light through research are listed below:

- Wireless data access networks (free wireless internet) as a boundary marker
- Free business data access service – this has worked well in several mid-Western towns in the US (the term “economic gardening” often underpins this activity)
- Librarians for business information – could help to guide use of data
- Free “Myers Briggs” or similar personality testing – to help creative teams find their business ‘soul mates’
- MA or PhD. By practical development of business or invention. This has proved successful in Australia to link academic practice with enterprise ambition
- New ideas showcase – a sort of market for innovation
- Biz Fizz panel – a scheme developed by New Economics Foundation which has worked well in small communities
- Envision the creative network – enable web conferencing - make the size and direction manifest
- A dedicated feasibility study budget, a vital step for new projects
- Creative Industries spatial development plan – annual
- Annual PEST conference – used to update the strategy
- Deptford TV (web based, narrowcasting model) - a distribution service for creative content
- Hub as a distributor of locally produced muzak - in malls, elevators and stations
- Deptford Family Tree – showing local histories of invention and entrepreneurship
- Urban environment and culture task force
- Public art agency
- Develop the gallery circuit
- Openings, at a different venue, every Thursday (e.g. 40 per year)
- Unified mailing / e-mail list
- Commission images of Deptford photos and make available free for use locally and nationally
- Entrepreneurs toolkit
- Small exhibition fund





16. BUSINESS PLAN

Stage two of the plan formulation process will involve taking all the ideas and assessing them operationally and then costing them against a delivery timetable. The results will be worked into a business and investment plan that covers the headings below:

- Investment required from LDA
- Matching investment from others, public and private
- Period required
- Capital
- Revenue
- Other sources of committed resources
- Milestones for delivery
- Risks
- Contingency
- Management details
- Proposed agency/partnership/network structure
- Development process
- Delivery process
- Evaluation and monitoring arrangements



LIST OF CONSULTEES

The following sub sectors will be consulted as part of the process:

Commercial Companies

Higher and Further Education

Arts Organisations

Strategic organisations

Non-formal / Voluntary Learning Sector (STEP providers)

Community





**THE BASELINE POSITION OF THE
DEPTFORD/CREEKSIDE
CREATIVE LONDON HUB:**
EXPLORING THE
'SPACES OF CREATIVE COLLABORATION'



FOR THE CREATIVE LEWISHAM AGENCY
BY TOM FLEMING CREATIVE CONSULTANCY

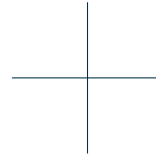




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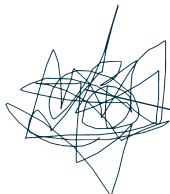


EXECUTIVE SUMMARY

This brief report offers an overview of the Creative Industries Baseline position for the Deptford/Creekside area of London: the proposed location for a Creative London Hub. The report provides intelligence to be utilised for the Deptford/Creekside Hub Investment Plan and complementary strategic papers¹.

IT PROVIDES AN OVERVIEW OF:

- Creative Industries Sector size and sub-sectoral breakdown
- Trends in sub-sectoral growth (or the absence of growth)
- An overview of the supply-chain patterns in the proposed Hub - towards a 'Creative Ecology' - to include non-Creative sectors that benefit from or contribute to the Creative Industries sector; the voluntary/community sector; the education sector; and other key institutions and agencies
- An estimation of the size and complexity of the proposed Hub
- Essential contextual information - such as demographics and relative implications for issues of access to cultural and Creative opportunities
- Strategic partnership opportunities and requirements: linking the proposed Hub to existing strategic initiatives and priorities, ongoing and impending developments, and complementary Creative Industries and cultural sector support programmes
- Prominent market failures in the Creative Industries sector: to be re-aligned as significant opportunities for investment in specific parts of the local Creative and Cultural economy that have the most potential as economic drivers, social and cultural catalysts and value-adding contributors to the wider socio-economic context of South-East London
- Major investment priorities for Creative London and partners as part of a package of support that provides required resources, infrastructure and connectivity for Deptford/Creekside to operate as a high growth, socially inclusive, value-adding Creative Industries Hub of regional significance.



¹Each proposed Hub must provide an Investment Plan if it is to be considered as a Creative London Hub and thus as a location worthy of Creative Industries investment from the London Development Agency.



Introducing the Area

The Deptford/Creekside area comprises a mix of high density housing (predominantly local authority or housing association, with an increasing range of new-build), light industry, new emergent business, and low-value retail. To the East, where it fringes Greenwich Town Centre, the retail offer and housing improves, and the range of businesses producing and retailing high value goods increases. The heart of the area is a classic 'zone in transition', a place that has faced significant processes of de-industrialisation (with a particular decline in engineering and maritime-related activities); depopulation (due to processes of counter-urbanisation that started pre-war with slum clearances, were accelerated with post-blitz relocation processes, and continued with broader processes of suburbanisation); repopulation (with high proportions of incoming ethnic minority populations, students, and young commuters); social fragmentation (due in part to discrepancies in opportunity and mobility for resident populations); and emergent business growth (linked to the relatively low cost of property/workspace, proximity/accessibility to markets, and strong - often innovative - support mechanisms and services).

Deptford/Creekside is poised for a process of transformation that will have a regional impact. Significant processes are afoot - including the awarding of Deptford/New Cross as a City Growth Strategy Area; the high profile development of a swathe of Thames riverside at Convoys Wharf; the pending Richard Rogers redevelopment of the much-maligned Deptford station and High Street; the commitment of Goldsmiths College to develop improved spin-out and knowledge-transfer initiatives in the locality; and the possibility of Ravensbourne College relocating to the Greenwich Peninsular, from which connectivity with local businesses and institutions will be paramount.

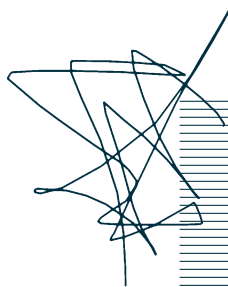
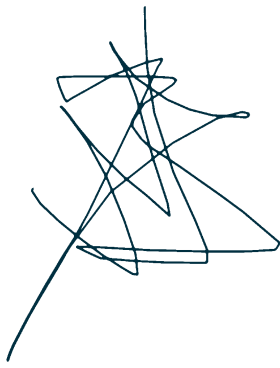




Figure 1: Approximate Boundaries of Proposed Hub Area



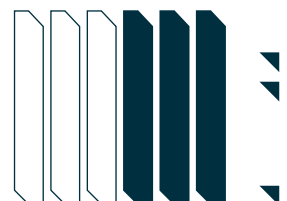
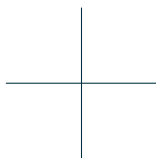
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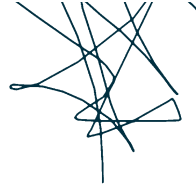


Setting Out Challenges

This report sets out the context of opportunity for the Creative Industries in Deptford/Creekside. It provides a basic outline of sectoral profile, of growth opportunities, and of how a co-ordinated approach to culture and creativity in the area can make a very valuable contribution to a range of strategic agendas - not least those articulated through the Draft Economic Development Strategy for London. The report also sets out some of the major challenges facing the Creative Lewisham Agency (as the lead Creative Hub partner) and major strategic partners as they seek to maximise the Creative potential of the locality. Challenges include:

- Diversifying the Creative economy: in terms of the types of business (by sub-sector), their position in Creative supply chains (attracting and retaining high growth businesses), and the types of people that manage the business or are employed by the business
- Improving connectedness: between businesses - through supply chain relationships that operate locally, regionally and beyond; between strategic partners, including education institutions and regeneration bodies; between locations - such as by improving flows and navigability between Greenwich and Deptford; through technology solutions - such as wider access to high band-width; and between communities - increasing opportunities for those presently marginalised
- Mixing the 'fine grain' with the 'spectacle': ensuring that the mix of buildings and street pattern (that which makes the area distinctive) are used to the advantage of the Creative economy while encouraging larger-scale developments (such as housing, leisure and retail)
- Identifying collaborative approaches to change rather than sector-focused solutions: Creative approaches to a range of commercial, social, cultural and environmental issues will advance the Creative Industries sector and maximise the value it adds to other sectors and spheres.



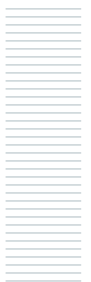
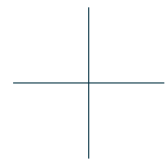
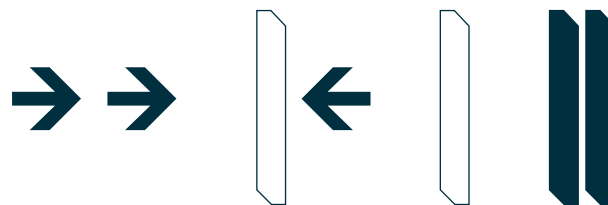


1. CREATIVE INDUSTRIES BASELINE

The following intelligence on sub-sector breakdowns is based upon previous research undertaken by Tom Fleming for the Creative Lewisham Agency in 2003-04, a refreshed approach based on incoming data (such as that introduced through the Lewisham Business Database prepared by Ancer Spa and broader business analysis undertaken for the City Growth Strategy) and a qualitative impression of the Creative Industries sector informed through an ongoing engagement in the area. The intelligence must be qualified as based upon approximation, given that much of the data is over a year old and new data is limited by SIC and SOC code definitions that fail to adequately delineate the relative presence of each Creative Industries sub-sector. In addition, existing intelligence does not cover the now expanded focus of the Deptford/Creekside Hub, which encapsulates part of Greenwich Town Centre and is limited because it is either based upon data that was previously Borough-wide, requiring an estimation of the proportion of Lewisham Borough Creative businesses based in the Deptford/Creekside area plus a parallel process of estimating the spatial distribution of sub-sectors); or it covers an area with slightly different boundaries to the proposed Deptford/Creekside Hub (for example, the City Growth Strategy area stretches further southwards than the proposed Hub).

Furthermore, existing databases - such as that developed by City Growth Strategy - provides data exclusively for businesses that are VAT-registered. This means that the majority of local Creative Industries businesses are overlooked. In response, attempts have been made in this report to assess and estimate the presence of smaller (below the VAT threshold) Creative businesses. This approach - without extensive qualitative research - will always be limited in accuracy.

Yet, the figures and proportions presented are as accurate as can be expected given available time and resources. This report is intended to provide indications of sector patterns and opportunities rather than to labour inefficiently to uncover every last Creative business or potential Creative business. Previous research has already made clear the emergent Creative Industries cluster in Deptford/Creekside. The challenge now is to build a more nuanced understanding of the sector, its trends, its support requirements, and its relationship to a range of commercial and strategic processes. This report is to be understood as undertaking part of this task, but it is clear that further research and an ongoing engagement with the sector will be required to ensure that intelligence is improved and that it maintains a strategic relevance.





1.1 Sub-Sectoral Breakdown

The Creative Industries sector is an aggregation of a complex collection of industrial and creative sectors and sub-sectors, and its 'boundaries' are thus often contested. This research is based on the definition employed by DCMS Creative Industries Task Force²:

“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, art and antiques, crafts, design, designer fashion, film, interactive leisure software, music, the performing arts, publishing, software and television and radio.”

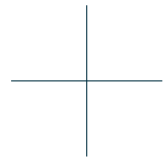
There are variations in sub-sector presence across the proposed Hub area, in large part due to issues of space provision - such as the mini-clusters of activity in managed workspace developments such as Cockpit Arts (Design and Crafts) and APT Studios (Visual Arts), and the other mixes of space - such as the larger and flexibly available workspace of the Faircharm Industrial Estate, the emergent provision of high-spec work-live developments, and the presence of retail/workshops in central Greenwich. For example, previous research undertaken by Tom Fleming Creative Consultancy (updated for this report) showed that within the Deptford Creative Enterprise zone³, possibly more than 434 Creative businesses are based in managed workspace developments such as artists' studios, or prominent agglomerations of industrial activity (such as industrial estates):

Figure 2 Creative Clustering in Deptford/Creekside:

'Key Cluster'	Number of tenant businesses/Organisations	Sub-sectoral focus
Cockpit Arts	54	Designer-makers
The Albany	7 approx.	Music, performing arts, community arts
Faircharm Estate (inc. Oils Studios)	68	Design, visual arts, advertising, fashion,
Creekside Studios	22	Visual arts
ASC Studios	56	Visual arts
Lewisham Art House	50	Visual arts, plus multiple cross-art-form businesses
APT	39	Visual arts
CBA	14	Visual arts
Acme Studios (Childhouse Street)	102	Visual arts
Elastic Space	22	Mixed
Total: 434		

² See **Creative Industries Mapping Document**, DCMS 2001.

³ Which approximates the proposed Deptford/Creekside Hub area and thus now forms the focus of the cluster approach of the Creative Lewisham Agency.



It is clear from the above table that this represents strong concentrations of Visual Arts and Design in the proposed Hub area. In addition - as will be shown - many of these businesses are extremely small and will therefore be omitted from research that is capable of identifying businesses that are VAT registered⁴. In addition, as is shown below, other sub-sectors are emerging in Deptford/Creekside, many of which have high growth potential and have significant catalysing and value-adding attributes, yet may lack a strong numerical presence.

The following provides a brief descriptive overview of the spatial distribution, relative scale, and apparent development trends/issues of the thirteen Creative Industries sub-sectors in the proposed Creative Hub:

1.1.1 Advertising: Emergent, Locally Orientated, Under-developed Accounts

Scale

Advertising as a coherent Creative Industries sub-sector has perhaps the lowest presence and certainly the 'least consistent' presence of any Creative sub-sector in the proposed Hub. The sub-sector is limited in Deptford/Creekside to a mix of very small companies that specialise in mainstream and mostly localised processes such as signage, telesales and disciplines such as event promotion. Unlike other inner-London 'fringe' locations (such as the City Fringe, Kings Cross, even Southwark), there is no evidence of any larger-scale, more 'creatively-focused' advertising companies in the area. Local companies must therefore buy-in such services from outside, develop them internally, or rely upon (make-do with) the limited Creative capacity of the local Advertising sub-sector.

If the definition of the sub-sector is taken to include marketing companies, signage companies, and sellers of advertising space (including those on outside hoardings), a total of **43 Advertising companies** (including marketing companies) can be identified in the proposed Hub area. These are all **VAT-registered companies** drawn from the database of Deptford/Creekside VAT-registered businesses. They include advertising consultancies, poster companies, marketing consultants, and a photography company that specialises in images for advertising.

This is predominantly a small business sub-sector (even without identifying businesses that are not registered for VAT). With forty employees, the largest business in the proposed Hub area is the marketing company, Promarketing Solutions Ltd., based on New Cross Road. The next largest company is the Allam Group, which specialises in managing and selling outdoor advertising. This typifies the non-Creative focus of much of the local sub-sector, with most businesses focusing on what is effectively 'advertising distribution'.

Of the VAT registered businesses identified, a total of over **200 jobs** can be identified. This number is likely to be considerably higher when small, often sole-trading companies are identified (although it is likely that most Advertising companies will be VAT registered).

⁴ Businesses that have gross income of more than £58,000 are VAT registered, as well as those that earn less than this amount but register for VAT voluntarily.





Spatial Distribution

The sub-sector is distributed inconsistently across the area, with no apparent clustering pattern other than in Astra House on Arklow Road, where eight companies are located. However, it is clear from contact details (they share a telephone number) that these companies do not operate entirely independently (i.e. they are effectively one company structure made up of 8 subsidiaries).

Business Profile

The mix of companies is suggestive of a lack of inter-firm supply chain relationships, and the use of mainly old industrial premises or low grade office facilities points among other things to a sub-sector that lacks high level Creative-led advertising companies and has a customer base in small businesses that do not specialise in high end products or services. It is possible that many of the faster-growing and emergent design companies in the area (such as web and image design companies) fulfil many of the advertising and even marketing needs of local Creative businesses. It does not seem likely that the local Advertising sub-sector is in a position to provide services to businesses that require highly innovative advertising for often highly sophisticated products. The absence of this 'section' of the Creative Industries supply-chain may be of concern to decision-makers if services are not available through Design companies or accessible (flexible and affordable) from companies based outside of Deptford/Creekside. However, there are signs of growth in this area, with companies such as Cog Design diversifying through developing specialisms in arts marketing, PR and media-buying ⁵. There is though much more scope for existing Advertising companies that might be encouraged to diversify their services and develop in ways more complementary to the emergent local Creative economy.



⁵ See www.cogdesign.com





1.1.3 Art & Antiques

Scale

For the purpose of connecting with Creative London agendas, little information will be provided for the Antiques sub-sector of Deptford/Creekside. Instead, more attention is given to the Visual Arts.

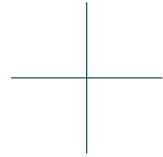
In short, there are **32 VAT-registered companies in the area that deal in Antiques**. These include book-sellers, coin specialists and bedstead traders. Most are retail-focused and located close to the centre of Greenwich. There are considerably more sole traders, hobby-ists and freelance specialists operating in Central Greenwich, which must be one of the major London 'Antiques clusters' for retail. A focus on the development of this trade, its support needs, and its relationship with contemporary Creative production (such as the synergies between cultural tourism for new products and old products) requires specialist research and might well be high on the strategic agenda.

The Visual Arts sub-sector has entirely different characteristics to the Antiques sub-sector, other than some similarities and shared supply-chains in distribution and retail. In terms of VAT-registered companies, Visual Arts is not a significant sub-sector in the proposed Hub area: there are **47 Visual Arts Companies** in the locality (including those specialising in photography and galleries). Based on VAT-registration alone, these companies **employ a total of more than 160 people**. However, more than any other sub-sector, the Visual Arts is made up predominantly of sole traders and many individuals who operate across more than one profession. Indeed, as shown in Figure 2, of the 434 Creative businesses based in studios in Deptford/Creekside, more than half work in the Visual Arts. This means that - allowing for some double-counting - at least **400 people work in the Visual Arts in the proposed Hub area⁶, operating as part of a sub-sector that comprises more than 300 companies**. This is before individual artists 'hidden' in residential addresses or non-studio complexes are counted. The Visual Arts sub-sector is therefore a major employer and driver of change in this small area of London.

Spatial Distribution

The Visual Arts sub-sector consists predominantly of sole-trading artists based in large studio complexes (such as ACME and APT). More research might uncover artists based outside of these developments. The studio complexes are clustered in and around central Deptford and New Cross, utilising the abundant stock of older industrial buildings such as warehouses. With a small number of exceptions, other functions within the Visual Arts supply-chain (such as retail and gallery functions) are located predominantly on the Eastern edge of the proposed Hub, in and around central Greenwich. Goldsmiths College can be considered a significant cluster in its own right due to the many visual artists that it employs as lecturers and assistants, and to the high numbers of students and graduates who practice in the locality. The College is certainly a major reason for the high numbers of Visual Arts practitioners located in Deptford/Creekside.

⁶ Although a high proportion of these individuals will also work in other professions.



Business Profile

It is this mix of available space - from the industrial ambiance of Deptford to the quaint terraced serenity of backstreet Greenwich - that provides the proposed Hub area with a significant advantage over other areas seeking to attract and nurture Creative activity. As is often the case, the Visual Arts sub-sector has operated as the 'pioneer', with studio providers and tenants valuing the industrial landscape of Deptford while taking advantage of the showcase and retail opportunities a little further East. Deptford/Creekside is increasingly recognised as a Creative milieu due to the high numbers of Visual Artists and a range of 'push' and 'pull' factors that have generated this Creative activity - such as proximity to Goldsmiths College, affordability, the rise of Greenwich as a place of Creative consumption, and the rapid realisation that a Deptford address offers credibility to an aspiring artist.

Indeed, much of the emergent vitality of the Creative Industries in the area can be attributed to the influence of 'settler' visual artists, organisations and institutions. This is something that has been captured and advanced by the Creative Lewisham Agency (such as through their role as an information resource and broker on property issues) and the increasing profile of the Deptford X festival⁷. It is being reinforced by sector-led processes such as the emergence of an independent gallery scene (often in temporary spaces), and new informal networks of Creative practitioners - often driven by strong independent intermediaries such as Framework Gallery.

However, the Visual Arts has a fragile ecology in Deptford/Creekside: networks are not as strong and productive as they need to be for the sub-sector to thrive from this location of relative isolation, property prices have in recent years risen, old industrial properties are attracting increasing attention from a range of developers (often featuring the local Visual Arts sector to attract tenants), independent retail in Greenwich is struggling to pay rates easily affordable to retail chains, the commercial opportunities along a refreshingly independently-managed Deptford High Street are under-explored, and commercial connectivity with sub-sectors such as Architecture and Design is under-developed.

Moreover, the productivity of the Visual Arts sector in Deptford/Creekside is unclear: there are undoubtedly lots of artists, but the extent to which (and the ways in which) they 'make a living' from their work, even make profits, is unclear. Research that sought to uncover the trading patterns, productivity, supply-chains and key barriers/opportunities for the Visual Arts sector of Deptford/Creekside would provide practical intelligence that would help to position the sub-sector relative to other Creative Industries sub-sectors and in comparison with Visual Arts clusters elsewhere in other Creative London Hubs (such as Notting Hill, Wood Green and City Fringe).

⁷ See www.deptford.org.uk





1.1.4 Crafts & Design: A Strong, Diverse, Though Underachieving Sub-sector

The Crafts and Design sub-sectors are being viewed collectively for this report. This is because in Deptford the overlap between the sub-sectors is strong (in terms of strategic issues), and they are often located in similar, if not the same accommodation (such as Cockpit Arts). The differences between Crafts and Design in Deptford are not as stark as they might be in, for example, a rural area. Indeed, most inter-firm differences are between product designer-makers (such as potters, furniture-makers, jewellers) and design service providers (such as web and graphic designers). The former can at once be Crafts and Design businesses; the latter are exclusively Design businesses, but lack the commonalities shared by many of the former.

Scale

In terms of numbers of businesses, Crafts and Design are second only to the Visual Arts as Creative Industries sub-sectors in Deptford/Creekside. This is in part due to the breadth of the sub-sector (as introduced above), the high numbers of small businesses (mostly sole traders, often part-time) located in managed workspaces, and the influence of Goldsmiths College (as an employer of Crafts and Design specialists and as a provider of graduates to the local Creative economy). There are a **total of 93 VAT-registered Crafts and Design companies in Deptford/Creekside**. These include 13 businesses that focus most exclusively on crafts (such as needlework, textiles, pottery), 7 furniture design companies, 17 graphic design companies, 6 web design companies, and 44 cross-discipline design companies. In addition, it is clear that there are many non-VAT-registered Crafts and Design companies in the proposed Hub area. For example, there are 54 businesses based in Cockpit Arts, of which just 1 business is VAT-registered and thus part of the above figure. It is not excessive to consider there to be at least 200 Crafts and Design businesses in Deptford/Creekside, employing more than 500 people.

Businesses in these sub-sectors vary in scale. However, most are likely to be small businesses, with the majority employing less than 5 people. The largest company in the proposed Hub area is, rather anomalously, a book-binders called J. Muir, based far to the east on Blackheath Road. Of the Design firms that sit more centrally in the sub-sector(s), Cog Design are an important local asset, employing 16 people and operating as major assets for the local Creative economy due to the clients they have and the reputation they bring. Other companies, such as Furnitubes International (30 employees: providers of high quality street furniture), Or Multimedia Ltd. (6 employees: graphic and web design), each of which has a distinctive (though often under-developed) role to play in the local Creative ecology.



1.1.5 Designer Fashion: Small, Hidden, Emergent

Scale

Despite the presence of Goldsmiths College and a very fashion-conscious local population, there are few Designer Fashion companies in the proposed Hub area. There are just 11 VAT-registered fashion businesses in the area - including non-design companies such as button wholesalers and T-shirt printers. The total number of Fashion companies approximates close to 40 - if tenants of Cockpit Arts are included, plus a scattering of sole traders, including those that sell out of Greenwich Market.

Most companies are very small, with only the non-design-based companies employing more than 5 people. This shows just how under-developed the sub-sector is in Deptford/Creekside: the research has not uncovered any Designer Fashion companies with an established track record and strong, growing markets⁸.

Spatial Distribution

Fashion retail (much of which is designer-maker-led) is predominantly located in Central Greenwich; fashion design is more evident in small Creative clusters - namely Cockpit Arts - plus some individual operations scattered across the proposed Hub area.

Business Profile

The sub-sector is relatively small in the area and is not likely to play a major role in future Creative Industries growth. There is evidence of some clothing manufacture, wholesale and of course retail, and it is possible that supply-chain relationships are emerging between these businesses and fashion designers - such as through short, flexible production runs and the supply of specialist materials. Targeted research might uncover the extent and detail of this activity, plus the potential mutual benefits for greater diversity and interactivity in the supply chain. This might point to the need for a targeted 'design into manufacture' scheme that assists designers to source local manufacturers and helps to manage this relationship to help the designers to grow markets through local partnership in cost-effective ways; and allows manufacturers and wholesalers to diversify their profiles so as to arrest the ongoing decline of the 'basic rag trade'. Such a programme has been piloted by the Ethnic Minority Enterprise Project (EMEP) in East London.

⁸ This does not mean they do not exist in the area.



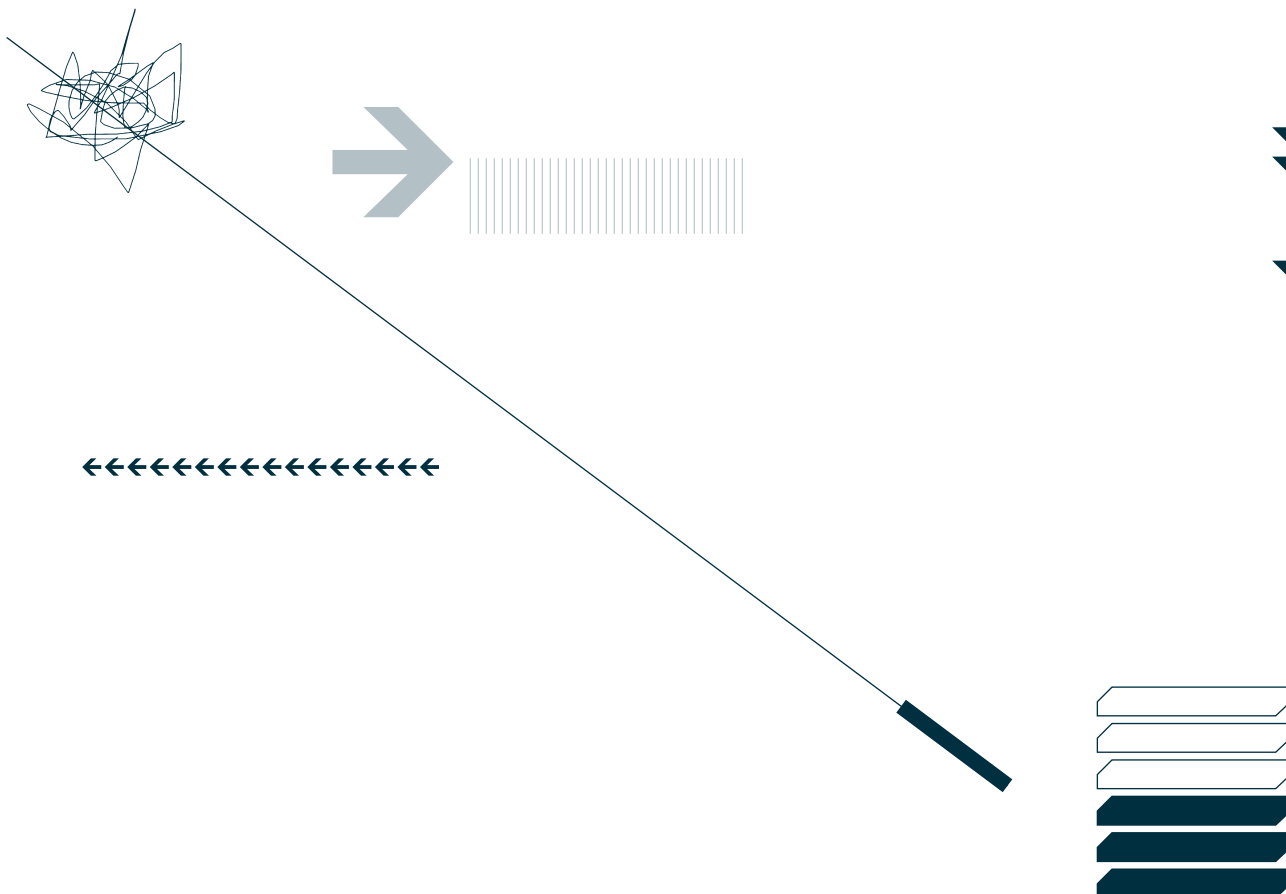


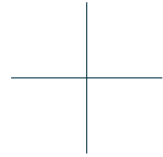
1.1.7 Interactive Leisure Software: Potential High Growth, Current Low Profile

Scale and Business Profile

Like Film production, evidence of a strong presence of Interactive Leisure Software companies is not forthcoming. Indeed, it is often very difficult to identify the extent to which a 'software company' deals in functional 'non-creative' software or 'Creative' software such as games. There are **9 VAT-registered Software companies** in the proposed Hub area, of which only Dotcog (part of Cog Design) sits centrally in the Creative Industries Sector. However, there are **89 VAT-registered companies classified as 'ICT'**. Of these, it is likely some will have software development function, of which a small proportion may have an interactive leisure software role. Indeed, it is likely that a significant proportion of these companies will operate in other Creative sub-sectors, such as web design; and most will hold a position within a Creative Industries supply chain - as part of the wider Creative ecology of Deptford/Creekside.

However, without further research, it is not possible to ascertain the scale or scope of the Interactive Leisure Software sub-sector in the proposed Hub area. What is clear is that the sector has huge potential: the co-location of resources such as Laban, Goldsmiths, plus a myriad of small cross-discipline Creative businesses, points to a market development opportunity in computer gaming and multi-platform leisure software development - especially where movement (such as through dance) is key.





1.1.8 Music: Bringing 'the Underground' into Business

Scale

Music is a major Creative Industries sub-sector in Deptford/Creekside. Indeed, as previous research for the Creative Lewisham Agency has shown, it is a major sub-sector for Lewisham Borough - especially with regard to the high levels of informal, non-commercial activity and enthusiasm, much of which emanates from BME communities. Music and the Performing Arts are the most inclusive (and therefore diverse) Creative Industries sub-sectors in the proposed Hub area. Indeed, these sub-sectors have the best 'on-the-ground' or 'in-the-community' facilities - including programmes and services such as Music City, Midi-Music and the up-and-coming Urban Kingdom.

In terms of numbers of businesses, there are **45 VAT-registered Music businesses (and organisations) in Deptford/Creekside**. This includes Music production companies, specialist retail, music teachers, and - on the edge of the area - Trinity Music College (with 218 employees). However, it does not include many of the small and emergent record companies (including those that cater for 'specialist music styles' such as Rai and Soca), the multiple tiny informal recording studios, and the networks of promoters, performers, 'activists' and others committed to music and aspirant of commercial success. As shown in work undertaken for the Creative Lewisham Agency that focused on the development of a community-driven though commercially focused Music company (trainer, promoter and record company) called Urban Kingdom, musical practice across the Borough of Lewisham and in particular in New Cross, is very strong, diverse, and in many cases has a high level of commercial as well as socio-cultural potential.

Spatial Distribution

Music businesses are scattered across the proposed Hub area, without any clear pattern. However, there are specific 'hotspots' of production and consumption. These include:

- Trinity College in Greenwich - a major international music establishment that works closely with Laban to develop cross-platform approaches to music and performing arts education
- Lewisham College - the major provider of music education for local people (60% of students are from an ethnic minority background)
- The Albany Theatre - a vital venue for local music performance, rehearsal and training. Relatively recently introduced facilities include a professional sound studio
- Music City - a cooperative that has recently moved to new high-spec' facilities in Deptford. Facilities include low cost recording and rehearsal facilities, technology and IT training suites, and a specialist music shop. Training is provided in collaboration with a range of partners - including Lewisham College
- Music retail in central Greenwich
- Pubs, clubs and bars in New Cross

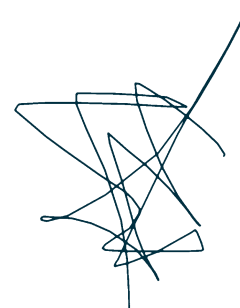




Business Profile

Given the very mixed profile of the Music sub-sector in Deptford/Creekside, rather than dwell on the technicalities of business types, it is perhaps more productive to feature briefly the main challenges for sub-sector development as a way of exploring business profile. These include:

- Building coherent and achievable career path opportunities for aspiring young people - building on aspiration and energy while ensuring skills are practically focused towards achievable careers. This will involve broadening the skills-base offered through 'music training' initiatives
- Connecting complementary businesses through supply-chain initiatives - this includes connecting music businesses with design businesses, performing arts practitioners, advertising specialists etc. The sub-sector is currently under-professional and insufficiently networked
- Improving (and increasing the offer/range/quality of) local venues to attract a wider range of music performance - towards building a 'scene' that compliments/overlaps emergent scenes in the Visual Arts, Performing Arts etc.
- Identifying ways in which specialist intervention can advance the business opportunities for specific types of business - such as record companies that specialise in West African music (an emergent sector in Deptford), urban music promoters requiring support with contracts, and classical music teachers at Trinity College keen to develop courses aimed at a diverse local population





1.1.10 Publishing (and Printing): Large Sub-sector, Unconnected to Creative Producers

Scale

There are **32 VAT-registered Publishing companies in Deptford/Creekside** (including independent book retailers). This is likely to represent the majority of companies in the sub-sector. The largest Publishing Company in the area is the magazine house CBC, which employs 35 people. Other larger companies include the retailers Greenwich Book Time on Greenwich High Street (14 employees), and a range of much smaller companies such as Deptford Forum Publishing and the South London Press and Mercury Group. There are also 3 VAT-registered journalists based locally.

In addition, there are **53 VAT-registered Printing companies in Deptford/Creekside** - many of them well-established and some relatively large. For example, over 60 people are employed just to the west of the proposed Hub area, at Christie's International Media Division; 60 people are employed at the Colourhouse on Arklow Road; and 40 are employed at Peregrine Press on the Deptford Trading Estate.

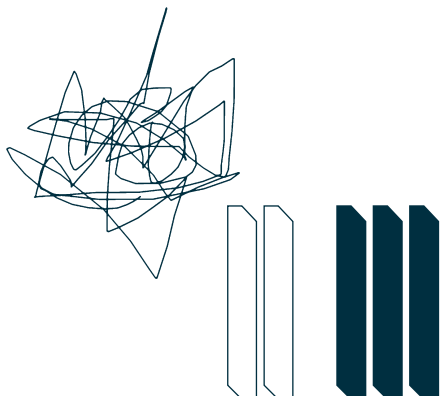
Spatial Distribution

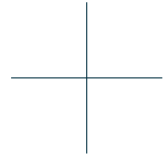
Book retail is clustered to the east of the proposed Hub area - in Central Greenwich. Other forms of Publishing - of which magazine and catalogue publishing is most significant - are spread across the area, with a slight concentration in Deptford (including a high growth music/youth Publishing company on the Faircharm Estate).

Business Profile

The future for Publishing in Deptford/Creekside became more uncertain recently, when CBC Media (at Greenwich Quay) was acquired by Swan Publishing. The future operations of the company are uncertain. It seems unlikely though that significant down-sizing (or even relocation) is imminent. The Publishing sub-sector (without Printing) is small and it seems under-connected with the rest of the Creative Industries sector. If the sub-sector is to grow - and grow complementary to other Creative Industries sub-sectors - then connectivity is key. As evidenced on the Faircharm Industrial Estate, real growth is possible where pools of Creative talent interconnect to make distinctive commercial propositions. This is of course emerging as a headline issue and opportunity for the proposed Hub.

Indeed, the potential to connect local Creative businesses to local print firms, to introduce flexible printing services, and to therefore diversify the clients and approaches of local firms across sectors, may offer a way forward that helps an ailing print industry and advances the capacity and scalability of local Creatives - especially those working in Design.





1.1.11 Software: As with Interactive Leisure Software - Low Creative Content Origination

Scale and Potential

As indicated above in the profile of Interactive Leisure Software, Software companies are not prominent in Deptford/Creekside. Indeed, the presence of a wider range of media and ICT companies is underdeveloped for an inner-urban area that is close to major financial services districts and global media clusters, as well as reasonably supplied with community media initiatives. This is despite the fact that ICT is by far the largest sub-sector of the Creative Industries in Deptford/Creekside (if any listed ICT company is understood as 'Creative')¹⁰, although it is unclear which ICT companies are Software companies. As introduced in 1.1.7, there are **9 VAT registered Software companies in Deptford/Creekside**, with activities including music and media software, research software, and a rather more vague 'software services'.

In 2004, benchmarking was undertaken using OCO Consulting's Location Benchmarking Model (LOCOassess™). This compares locations across the key drivers identified for City Growth Strategy status. Deptford and New Cross were described as having good conditions for Software growth - as a 'Software Centre (ICT) - due to below average costs and a high quality available workforce (much of which makes a daily commute out of the area). The potential for a type of Media Lab was also identified. Indeed, all of this is possible if the added benefit of a strong and diverse Creative Industries sector is taken into consideration: the demand for high quality, innovative content is only going to increase; opportunities for local and incoming Software companies are therefore only too apparent so long as they can build connections and partnerships with complementary Creative Industries businesses.

1.1.12 Television & Radio: Very small, Little Cross-Sub-sectoral Integration

Scale

Television and Radio is a very small Creative Industries sub-sector in Deptford/Creekside - especially if Pirate Radio is to be overlooked as a contributor to the Creative economy (it is certainly vital for networking and showcasing). There are just **6 VAT registered Television and Radio companies in the area** (excluding those Film companies that also do Television work). The most prominent of these is the tiny Fiction Factory, a Radio Production Company based on Greenwich Church Street. However, as with any Creative Industries sub-sector, there are undoubtedly a number of sole-traders and small companies that sit below the VAT threshold and are hidden across the area.

Business Profile

Supply chain issues are key for this sub-sector, with connectivity to major broadcasting clusters a major reason for the low profile of the sub-sectors in Greenwich/Creekside. However, this may change with increased access to wireless technology and potential new developments such as the re-location to Ravensbourne College and other potential media developments on the Greenwich Peninsular. An ongoing focus on these developments should be maintained.

¹⁰ For example, students at Goldsmiths have access to a number of practical facilities including edit suites and recording studios. Visual Arts students have exclusive access to a fully integrated digital media facility for use for computer graphics and animation, authoring interactive DVDs, video streaming for the Internet etc. In addition, Goldsmiths' students have access to loan equipment including lap-tops, MiniDV cameras, Super 8, recorder and a selection of microphones. Goldsmiths have an ambitious plan over a seven-year timescale to become a leading centre for multi-discipline post-graduate and research work. Goldsmiths also runs both a BA and MA course in Media and Communications, both of which include some practical elements in which production skills can be applied to the creation of small scale projects including television, electronic video animation, radio, print journalism, photography, scriptwriting and creative writing. The MA in Feature Film has been running since 2000 and has proved extremely popular. It is a mix of theoretical and critical engagement with the mechanics of the film industry from script development to exhibition, allied to the practical production of a feature film package - script development - which the student can utilise after the course, together with introductions to key organisations within the UK film industry. The only aspect of Goldsmiths media activity which can be accessed by the wider community is the Professional and Community Education Department (PACE) which runs both theoretical and practical courses e.g. certificate in media and communications; introduction to single camera; introduction to television studies; scriptwriting etc. (see the Lewisham Film and Media Strategy for more details).



1.2. OVERALL SECTOR SIZE

1.2.1 Number of Businesses

The following table (Figure 3) provides an overview of the total number of VAT-registered Creative Industries businesses in the proposed Hub area - based on the City Growth Strategy database (as extensively edited and analysed by TF Consultancy). It also provides an estimate of the likely numbers of additional Creative Industries businesses. This is based on an awareness of the numbers of businesses in managed workspace initiatives/clusters and the matching of these addresses to the City Growth Strategy database (to uncover those not previously counted). Furthermore, a final column of 'additional hidden businesses' is provided as a conservative estimate of sole traders and very small businesses that occupy business premises and residential addresses across the area. This is based on experience of Creative industries mapping work in comparable inner-London locations (however, it should be treated as nothing more than an estimate). Over-estimation here is unlikely due to the likely daily out-migration of Creatives to Central London locations, coupled with a degree of 'mixed location working' where Creatives will split their time between residential addresses in the locality and commercial addresses in Central London and elsewhere.

Figure 3: Creative Industries Businesses in Deptford/Creekside - Estimated Total Numbers

Sub-sector	VAT registered companies in the proposed Hub (CGS 2004 - edited & analysed by TF Consultancy)	VAT registered Additional Creative Companies in Recognised Clusters	Estimates of additional 'hidden' Creative Companies	Total Number of Creative Companies	Total Number of Creative Companies Minus 'ICT'
Advertising	43	3	5	51	
Architecture	20	3	2	25	
Art & Antiques	79	200	55	334	
Crafts & Design	93	175	25	293	
Designer Fashion	11	29	10	50	
Film	9	5	7	21	
Interactive	9	2	5	16	
Leisure					
Software & Software					
Music	45	5	25	75	
Performing Arts	32	11	25	58	
Publishing & Printing	25	1	5	31	
TV & Radio	6	1	5	12	
Additional 'ICT'	89	N/A	N/A	89	
				Total with ICT: 1,055	Total without ICT: 966

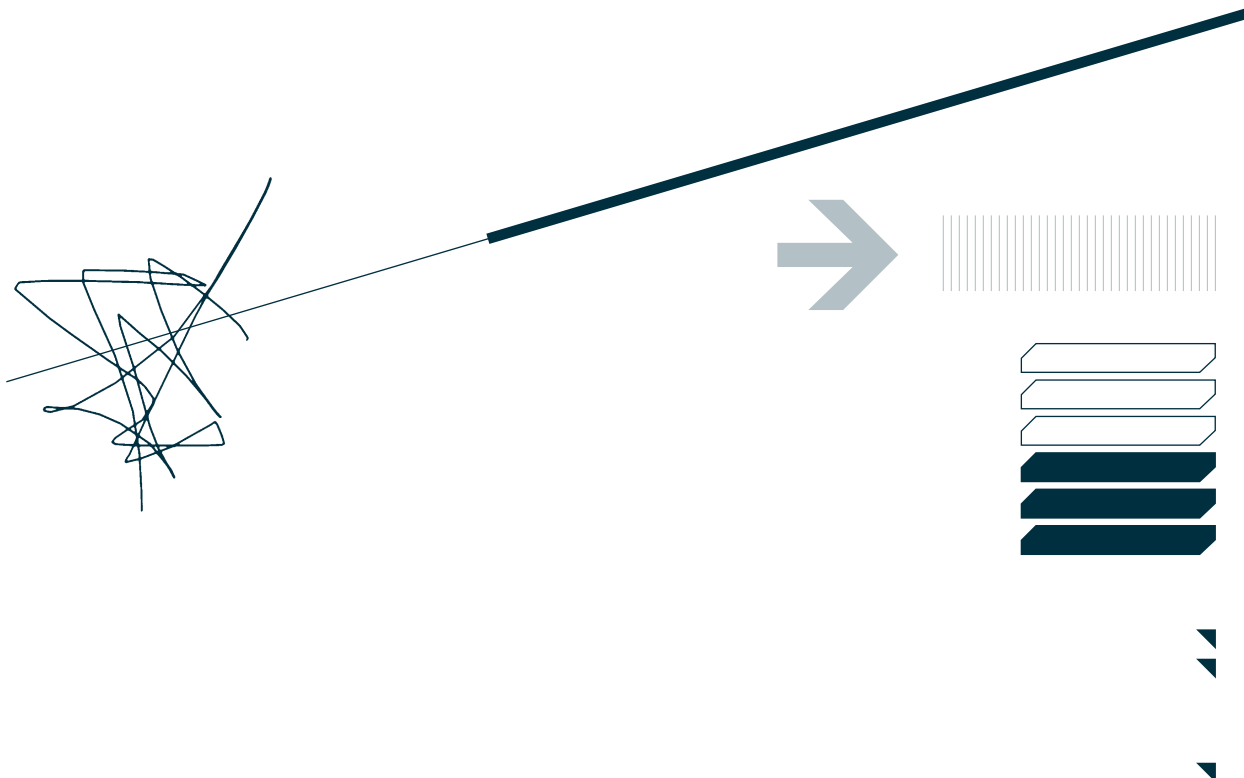
Therefore, at a conservative estimate, there are 966 Creative Industries businesses in Deptford/Creekside (including Central Greenwich).

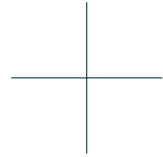
Figure 4: Creative Industries Businesses in Deptford/Creekside - Estimated Total Numbers

Numbers of CI Business/Organisations	Estimated Number of Creative Industries Jobs	Estimated Average Salary per person (p.a.)	Total GDP for the CI sector of Deptford/Creekside (£) p.a.
Estimated total: 1,055	8,846	18,000	Total: £159,228,000

+ Includes larger operations such as galleries, high profile SMEs such as Source Communications, and ICT/Printing/Publishing jobs - many of which will not sit centrally within the 'Creative Industries'. In-depth analysis in line with the DCMS Data Framework will help to uncover the nuances here.

The above figures require intensive analysis, but they offer a useful 'opening gauge' of the value of the Creative Industries sector to the economy of Deptford/Creekside - even though they do lack essential additional factors (such as company profit). The 'Estimated Average GDP' for 'clustered businesses' is based on an understanding of the productivity of individual visual artists and designer-makers. Many 'produce' considerably less than this figure; some considerably more; and a high proportion supplement income through other sources (from teaching to bar work). In addition, other sub-sectors such as Architecture have higher average salaries (and profit margins), so it is likely that the GDP estimates are quite conservative. It might be argued that this productivity also be 'factored in', because it helps to support Creative activity and is thus intrinsically linked to the Creative Production Chain. This would require a much more intensive research approach.





2. MAJOR INSTITUTIONS AND PARTNERS

The following provides a brief overview (more of a list) of major strategic and delivery partners in the proposed Deptford/Creekside Hub. These are identified in terms of how a relationship/partnership with the Creative Lewisham Agency might be developed to drive forward the Creative London Hub Programme. This is to be overlain graphically on to the supply-chain map presented in Section 3 below. Together, this will form an overview (an aerial view) of the Creative Industries sector in the proposed Hub area to represent the overall 'Creative Ecology' of Deptford/Creekside. They build on the work developed by Tom Fleming Creative Consultancy (2004) that focused on configuring a 'Creative Knowledge Pool' for Lewisham Borough.

The key constituent parts of the 'Institution and Partner Map' (presented in Section 3) include:

- THE CREATIVE AND CULTURAL SECTOR

The Creative Lewisham Agency has already developed strong partnerships with a range of individual businesses, organisations and intermediaries working across the local Creative Industries sector. Other key partnerships in Deptford/Creekside that have a cross-sub-sectoral approach to the Creative Industries include those with Head for Business (a targeted Creative Industries support initiative), The Prince's Trust (which is very active locally), The Lewisham Chamber of Commerce, the education sector (see below), Thames Gateway Cultural Skills Partnership, and developers that value creativity as a matter of comparative advantage. Major partners active in the Creative Industries sector (as their sole activity) include (on a sub-sectoral basis):

- **Visual Arts:** Studio Groups/Managers (e.g. APT, Oils, Acme), Gallery owners, training providers, events/networks (e.g. Deptford X), intermediaries (e.g. United Arts Village, Greenwich), retail (e.g. Greenwich Market), the independents¹²
- **Architecture:** Leading businesses, private developers, prominent associations (to attract interest in the area as a place of boundary-crossing, innovative architecture), the independents
- **Crafts and Design:** Studio Groups/Managers (e.g. Cockpit Arts), Gallery owners, training providers, events/networks (e.g. Deptford X, Designers Bloc, London Design Festival), intermediaries, retail (e.g. Greenwich market), the independents
- **Designer Fashion:** London Fashion Forum, London Fashion Week, Fashionworks (for advice and networking), EMEP (to consult on Design into Manufacture), Centre for Fashion Enterprise, Fashion Capital, London Apparel Resources Centre, the independents
- **Software:** Ready 4 Growth, Film London, New Media Knowledge, emergent companies
- **Music:** Midi Music, Urban Kingdom, Music City, Urban Development, venues (e.g. The Albany, Laban), independent studios and emergent record companies/promoters (the independents)
- **Performing Arts:** Laban, The Albany, Greenwich Theatre, the independents
- **Film, Television & Radio:** Film London, Community Media Association, Lewisham & Greenwich Film offices, BBC CPR, Channel 4, the independents
- **Publishing (& Printing):** the independents

¹² Referring in each case to the myriad of small businesses, practitioners, potential businesses etc. active in the locality.



- THE REGENERATION AND ECONOMIC DEVELOPMENT SECTOR

The major regeneration and economic development partners for Creative Lewisham as it seeks to establish a coherent approach to Creative Industries support, can be defined by geography:

- REGIONAL:

Creative London (London Development Agency) - strategic lead, investment - to include Creative London initiatives such as 'Own It', Creative Industries Seed Fund, etc.

Arts Council England (London) - investment and support for individual projects/businesses/organisations

Greater London Authority - strategic guidance and some investment

London 2012 - to ensure cultural projects and positive externalities come to the area

Business Link 4 London - To co-ordinate and target business support

Social Enterprise London - to ensure the Creative Industries sector is developed in an inclusive way, allowing for progression roots from 'the community' and social enterprise sector

Greater London Enterprise - to ensure there is take-up of their investment opportunities and to identify research and intelligence of relevance to the locality

Learning Skills Council - driving forward a strategic approach to training and development that connects to the Creative Industries sector

- SUB-REGIONAL:

Thames Gateway London Partnership - to develop a coherent approach and influence wider planning issues

Other Creative London Hubs (notably City Fringe, Leaside and South Central) - encouraging a shared approach to issues such as research and supply-chain development

- LOCAL:

London Boroughs of Lewisham and Greenwich - vital for strategic development, investment and all approaches to cross-sector work

Lewisham Chamber of Commerce - to build links with specific businesses and raise awareness of the Creative Industries sector to Chamber members

New Cross New Deal for Communities - to target support to local people, lever investment, and connect to wider processes of change

City Growth Strategy - to share intelligence, consult on priorities, and explore inter-sector supply-chain opportunities

The Princes Trust - to further develop the partnership that has developed on the Faircharm Industrial Estate, where the Prince's Trust has established a complementary organisation to provide subsidised space and specialist support to selected Creative Industries businesses

Developers/Projects - such as the redevelopment of Deptford Station, Convoys Wharf, and the Seager Building - to influence approaches to design and tenancy and lever opportunities for Creative businesses to benefit/get involved

- THE EDUCATION SECTOR

Goldsmiths College - to develop partnership towards a more intensive and targeted approach to knowledge transfer (and graduate retention) and to widen accessibility to courses and to lever opportunities for the College to play more of a role in improving the local public realm

Lewisham College - to facilitate more outreach training, identify career path development opportunities for local students in the local Creative economy, and to broker improved strategic partnership with other education, training and business development organisations and agencies

Ravensbourne College - to continue to consult and advise on potential relocation to the Greenwich Peninsular

Laban and Trinity College - to continue to build strong strategic ties and to advise on how supply-chains can be developed with local Creative businesses (e.g. towards animation, leisure software etc.).



3.1 **Developing Deptford/Creekside as a Creative London Hub: A Network and Supply-Chain Proposition**

The major challenge for Deptford/Creekside, if it is to become a successful Creative London Hub, is it to advance connectivity both within the Hub and between other Creative London Hubs. This requires an approach to specialist intervention that is articulated through strong partnership and that seeks at all times to connect businesses and organisations to each other. This in turn will increase and improve trade, creativity and innovation, advance skills, enhance 'Creative senses of place', and build factors of comparative advantage for the area. It will, in simple terms, begin to operate as a rich, integrated Creative cluster; rather than operate as a ragged, inchoate though extremely promising emergent Creative cluster, as it is today.

It is clear that each of the current factors of market failure in the local Creative Industries sector can be remedied through initiatives that combine better and stringer networks, connections and partnerships, with whichever specialist and targeted intervention is required (such as advice, training, workspace etc.). For example, the following are major issues of market failure in Deptford/Creekside:

Increasing Advertising Quality and Capacity

The Advertising sub-sector (and related areas such as marketing and identity design) is underdeveloped, with existing companies not prioritising Creative work that could provide a service to up-and-coming local Creative companies or longstanding non-Creative local companies. There is a need to raise the capacity of existing advertising firms to enhance their portfolios and improve their capacity to respond to the changing local market; design firms can also be supported along similar lines; while there is also a need to develop markets for high quality Creative advertising amongst potential 'customer' firms - be they Creative or non-Creative. The way forward here is to establish targeted supply-chain initiatives that connect complementary businesses to each other and is complimented by specialist training and advice that works to improve quality and capacity.

Raising the Productivity of the Visual Arts, Crafts and Design

The Visual Arts sub-sector in Deptford/Creekside is numerically large but it seems (more research is required here) to be under-productive, with under-developed markets, poor business skills, and low levels of confidence. The same applies, to a lesser extent, to Design and Crafts. This is typical for the sub-sector(s) in most locations, but in emergent locations, issues of isolation and low confidence are more significant - especially given that many businesses are newly formed. To enable the sub-sector(s) to grow more productive requires a mix of specialist support (such as business advice, marketing etc.), inter-firm networking (collaboration and communication builds intelligence and confidence), and product-to-market intervention (such as linking production to retail opportunities). With regard to the latter point, in Deptford/Creekside, artists and designers are not effectively exploring the retail offer of Central Greenwich or indeed the potential along Deptford High Street.



Knowledge Transfer, Spin-Outs and a Creative Sense of Place: The Potential Goldsmiths Effect

The presence of Goldsmiths College in SE14 is an enormous asset to the Creative Industries sector and broader economy of South-East London. The College is one of the leading Arts and Creative academic institutions in the UK, with a Research Assessment Rating of 5 for Art and Design, 5 for Music, 5* for Media and Communications, and 4 for Drama. It brings enormous prestige to the area and provides a Creative energy to Deptford/Creekside (especially towards New Cross) that impacts beyond the 'walls' of the College. Furthermore, it is the most significant Creative Industries employer in Lewisham, with - in 2002 - 330 academic staff, 100 research and technical staff, and 496 visiting tutors. If the latter are 'counted' as 'half a job', the College employs a total of 678 Creatives, which can be added to the 'Deptford/Creekside Total' to establish a total figure of **9,524**¹³. Furthermore, it might be assumed that these staff have a combined income of £14,914,000¹⁴, which elevates the total Creative Industries GDP pa of Deptford/Creekside yet further. A similar exercise might be undertaken with, for example, Lewisham College, Laban or Trinity College (although figures would of course be lower).

Goldsmiths College currently has over 7,500 students, of which nearly 2,000 are 'post graduate taught' and over 500 are 'postgraduate research'. It is thus a vital 'supplier' of Creative graduates (and postgraduates) to the UK's Creative Industries economy. It also, therefore, has the potential to impact far more extensively on the Creative economy of Deptford/Creekside. No doubt many Creative businesses in the locality are led by and/or employ Goldsmiths graduates, yet it is clear that this 'Knowledge Transfer' is operating at a level well below potential. Furthermore, Knowledge Transfer from Goldsmiths is under-developed in a number of other areas, including - vitally - the impact the College might have in reconceptualising and enhancing the local physical environment, the 'cultural sense of place', and local approaches to innovation and entrepreneurialism.

The College was not forthcoming in releasing data on where current students and staff live, nor on the 'First Destinations' of graduates (possibly providing information on the locations of new

Creative business start-ups)¹⁵. Yet while the potential of the College for Creative Industries 'job provision' is important, with a lot of scope for reducing the 'leakage' of graduates to other parts of London and elsewhere; what is perhaps more important is the role the College might play in transforming the physical and 'semantic' landscape of Deptford/Creekside (from providing in-kind public-artists to assisting in the place-marketing of the proposed Hub), and through applying expertise and resources to Creative infrastructure provision (such as through Creative incubator space). New buildings, such as the Allsopp Development behind Deptford Town Hall and a proposed new 'Gateway Building' - a gallery and rehearsal space in New Cross Gate provide new opportunities for Goldsmiths to embed itself within the networks and supply chain relationships of the broader local Creative sector.

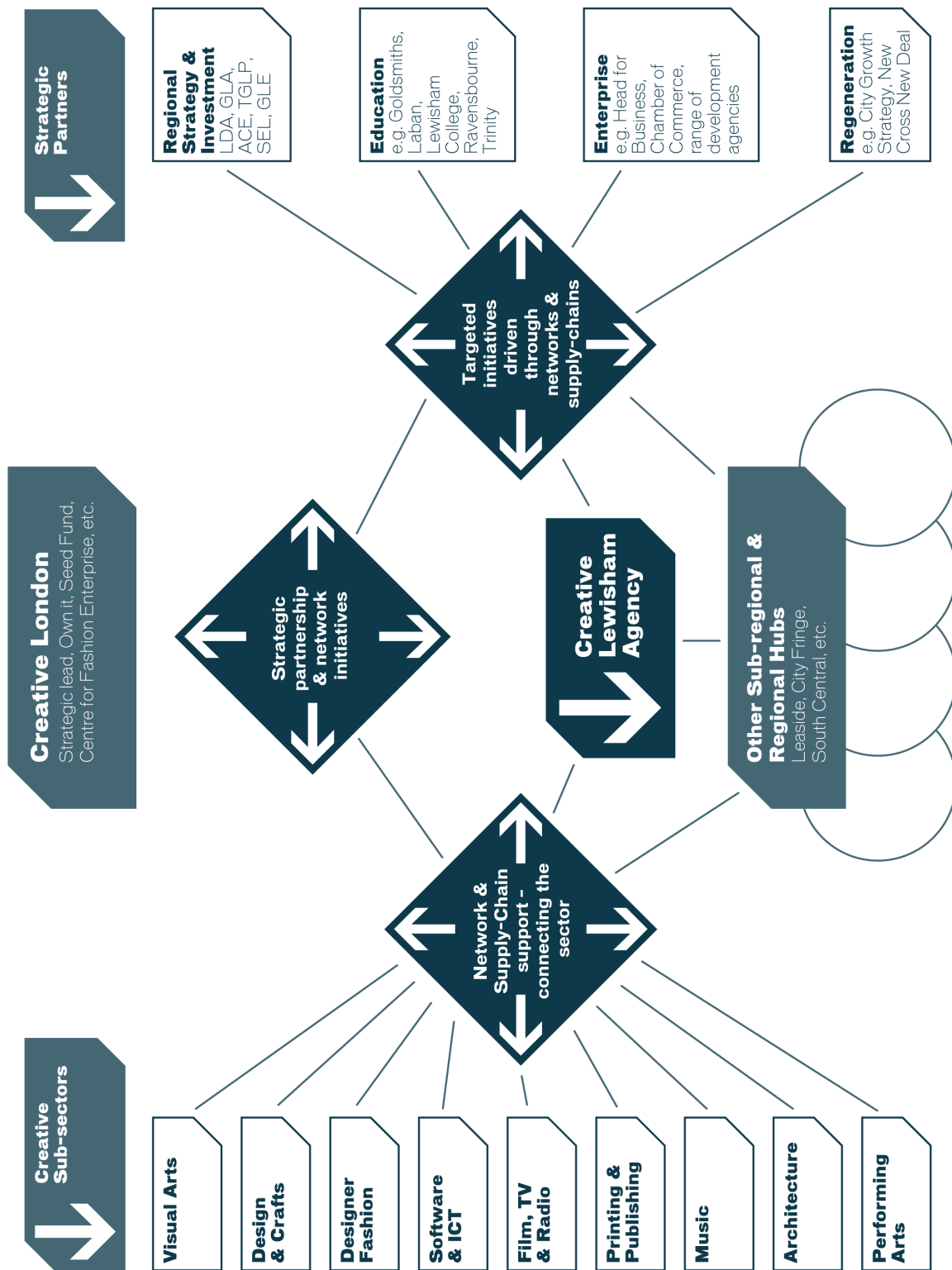
Previous research undertaken by Tom Fleming Creative Consultancy shows that if just 5% of Goldsmiths graduates per year are encouraged to establish businesses locally in a cluster that has the potential to become an irresistible magnet for aspiring Creatives and that has a broader reputation that recognizes Deptford/Creekside as 'prestige addresses' for high quality Creative products and innovation, then over a 10 year period, a total of £25,140,000 will be added to the Creative economy of Deptford/Creekside. This is a figure that will of course rise if it is assumed that some of these businesses will develop to employ staff; if this growth helps to attract businesses from elsewhere and adds to the productivity of resident businesses; and if local young people are encouraged to develop start-up businesses alongside Goldsmiths graduates. Key to this is the organizational commitment of Goldsmiths; the presence of intermediaries and gatekeepers directing graduates to local opportunities; and of course of sufficient affordable, high quality workspace. This is a colossal task in a global Creative Industries city with porous Creative 'communities'. Yet it shows that even a small amount of connectivity between the Creative asset that is Goldsmiths and the nascent Creative milieu that is Deptford/Creekside can have an enormous effect. If just 1% of Goldsmiths graduates establish a business in Deptford/Creekside every year, this will have provided a gross turnover of £2,600,000 to the local Creative economy by 2015.

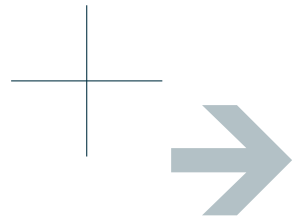
¹³ Although it is probable that a proportion of these staff are practicing artists (etc.) in the Borough and have thus been 'counted' elsewhere.

¹⁴ Based on an estimated average income p.a. of £25,000 for academic staff; £22,000 for research and technical staff; and £9,000 for visiting tutors.

¹⁵ Although information on the second, third etc. destinations is probably more valuable, since few graduates will start a business or be employed immediately.

Figure 5: Creative Industries Businesses in Deptford/Creekside - Estimated Total Numbers





4. ADDRESSING MARKET FAILURE AND PURSUING OPPORTUNITIES: INVESTMENT PRIORITIES

The Creative Lewisham Agency - the lead partner for the proposed Deptford/Creekside Creative London Hub - operates across the following main work areas:

Enterprise: With an emphasis on:

- Workspace development (flexible, affordable and clustered to respond to existing sector need and generate need through the appeal of Creative business location in Lewisham).
- Infrastructure (from social networks to Broadband, seeking to develop bespoke projects that enhance competitive advantage and ensure sustainability).
- Support (delivering or enabling the delivery of appropriate training, business development and career path opportunities, with an emphasis on partnership).

Milieu: With an emphasis on:

- Ideas and a 'culture friendly place' (enhancing the 'Creative dividend' of Lewisham and its key networks and clusters through showcasing, business and social-focused initiatives).
- Networks (adding value to and strengthening existing networks; establishing lead networks; developing supply-chain initiatives as signatures for a Creative sense of place).
- Urban showcasing (interfacing cultural expression between Creative practitioners and the wider communities of Lewisham).

Environment: With an emphasis on:

- Fine grain development (advocating for and in some cases managing change to ensure new developments proceed to compliment the best aspects of the existing built environment).
- Public art (leading public art projects to improve the environment and enhance the Creative dividend).
- Advocacy and Debate (generating debate, engaging with decision-makers, promoting culture and Creativity as key drivers in the transformation of the physical and socio-economic landscape of the Borough, sub-region and region).

For the Creative Lewisham Agency to operate as a successful intermediary, champion and strategic manager of the proposed Creative London Hub in Deptford/Creekside, it will require resources to undertake 2 main work areas:

- General intermediary work: developing networks, acting as a sector champion, providing information and intelligence, signposting Creatives to other Creatives and related opportunities, brokering relationships, leveraging investment, and commissioning research.
- Specific and targeted project work: to manage a programme of innovative, bespoke initiatives that include interventions in enterprise (such as seminars) - commissioning specialist training; milieu - managing showcasing and networking events, leading branding exercises; and environment - leading public art and design intervention, advising on major developments etc.

These 2 main work areas absolutely overlap, each intersected by the cross-cutting themes of enterprise, milieu and environment.

Previous research undertaken by Tom Fleming Creative Consultancy identified the following interventions as a priority for the Creative Lewisham Agency and partners, with LDA Creative London investment vital for action to proceed. This has been re-assessed and re-positioned in the light of this research:





Enterprise:

Challenge: Build more detailed knowledge of sector size and characteristics through a Creative Industries Audit for the proposed Hub area, matching quantitative approaches with very nuanced qualitative approach that uncovers smaller businesses and organisations and identifies supply-chain opportunities and challenges. Focused work is also required to identify production deficiencies and remedies for specific sub-sectors (such as Visual Arts and Design) and to develop a close appreciation of how the larger institutions can improve their knowledge transfer role and general contribution to a 'Creative sense of place'.

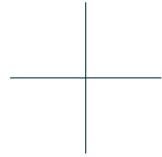
Challenge: Enable more short and long term affordable studio and workspace facilities to be located in Deptford/Creekside (as close together as possible), linking with potential Higher Education initiatives. A further challenge is to connect these physical interventions through network building and events; and to encourage temporary Creative usage, so that Creative production is always on display in locations such as old shops, improving the environment and milieu and establishing Deptford/Creekside as a destination feature in its own right. A 'Creative Masterplan' for the Creative use of space is proposed.

Challenge: Build a small specialist Creative business support infrastructure that focuses on information provision and development advice (where very technical advice is provided by sub-contracted agents), with the facilitation of networks a key 'medium' for sustainable growth (through the transfer of ideas and information). The Creative Lewisham Agency might provide a specialist Creative Industries business advice service that sits alongside the wider offer of Business Link, the Chamber of Commerce, delivery bodies such as The Prince's Trust, and specialist functions of Creative London such as 'Own It'. This role will focus predominantly on signposting and information services (hence the importance of networks), with practical advice given on issues such as fund-raising, market development and training opportunities. A balance of Creative Industries expertise and a knowledge of the specific opportunities and constraints of the local sector is thus required: a classic position for the Creative Intermediary.

Challenge: Establish a long-term approach to Creative skills development in Deptford/Creekside, so that the Creative Industries sector combines innovation with the capacity to maximise the potential new ideas can bring. This might be developed under a 'Talent Strategy' for Deptford/Creekside. This should be managed in partnership with FE and HE providers, National Training Organisations, the Learning Skills Council and of course local business.

Challenge: Bring together Higher Education and Further Education interests, whilst securing the long term presence in Deptford/Creekside of a Creative Industries focused Education Partnership, charged with building local employment opportunities and working to improve the local Creative Dividend in a way that reduces 'talent leakage' and diversify the sectoral profile. Every effort should be made to build partnership and position the Education sector as central to the Creative regeneration of the area. This will involve advocacy (of the multiple roles of the sector, especially Goldsmiths College); practical HE target initiatives (where for example, the intermediaries engage with students to promote career path development in the Creative Industries sector and highlight the potential of this as a local activity); and partnership projects (such as alumni showcasing).





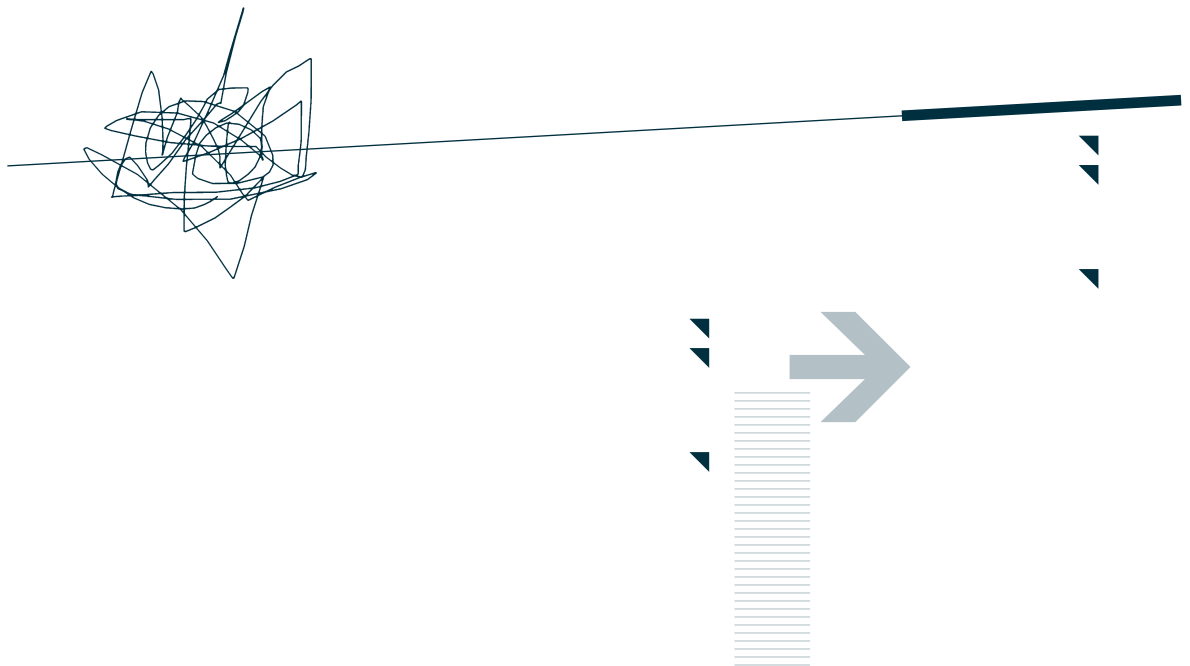
Milieu:

Challenge: Develop a Network Development Programme for the Creative Industries sector, driven through a partnership of business and hubs (such as Cockpit Arts and Goldsmiths College); steered by Creative Intermediaries (within the Creative Lewisham Agency and through lead businesses and individuals). This will provide the 'soft infrastructure' that carries information and ideas to open Creative Businesses to new opportunities in Deptford/Creekside and elsewhere, and connect them to each other. The Creative Lewisham Agency might establish sub-sectoral network projects; seek to add resources and direction to existing networks; develop opportunities to present local Creatives at Trade Shows (marketed as 'Deptford Creatives'); and provide a 'dating agency' role where local businesses are introduced to each other for the purposes of trade and collaboration.

Challenge: Utilise the diversity of the local Creative Industries sector as a strength, channelling trading and information flows between firms (including the 'non-Creative sector') to raise the standard, productivity and profile of the local Creative sector. The Creative Lewisham Agency could work with key partners such as workspace providers, galleries and the Higher Education sector to develop showcase and network initiatives that have the dual purpose of building sectoral profile and identity, and facilitating the transfer of ideas and knowledge. Initiatives might include managing a Goldsmiths alumni showcase, and urban music products/showcases.

Environment:

Challenge: Build a coherent, progressive sense of place for Deptford/Creekside that is focused through Deptford/Creekside as a 'Creative place' for Creative business. This should combine physical improvements with the development of new facilities, the inclusion of innovative design features, and marketing processes sensitive to the locational aspirations of the Creative Industries sector. The Creative Lewisham Agency will be involved in leveraging physical regeneration projects and public art initiatives, while actively 'selling' Deptford/Creekside as a 'Creative proposition'. This should be on a local scale - to develop partners; a regional scale - for partnership and investment; and a national scale - as a model of good practice and as a town that is recasting itself through the 'Creative Dividend'.





Appendix 1: Documents Consulted

- City Growth (2004) City Growth Phase II:
Baseline Report - Deptford New Cross - A Final Report
- City Growth (2004) Deptford/New Cross, Draft
- City Growth Strategies (2004): Phase 2 Deptford New Cross Renaissance -
Proposal Submitted to the Small Business Service by the London Development Agency
- City Growth Strategies (2004) Phase 2: Inward Investment Review, Draft
- Cooper, C. 2000, Mapping the Cultural and Creative Sector in Lewisham: Opportunities for the Future
- Creative Lewisham Agency (2003) Broadband Network Delivery Programme,
Prepared by Magic Lantern
- Creative Lewisham Agency (2003) Realising the Potential:
Paper Presented to the Mayor's Commission on Creative Industries
- Creative Lewisham Agency (2003) Creative Industries Potential in Lewisham:
From Strength to Strength, Prepared by Tom Fleming Creative Consultancy
- Creative Lewisham Agency (2003) Lewisham Business Profile:
A Baseline Scoping Document, Prepared by Tom Fleming Creative Consultancy
- Creative Lewisham Agency and London Borough of Lewisham (2003)
Towards a Film and Media Strategy for Lewisham
- Creative Lewisham Agency (2004) A Feasibility Study Towards a Sustainable Not-For-Profit
Music Company with a Commercial Record Company 'Arm',
Prepared by Tom Fleming Creative Consultancy
- Creative Lewisham Agency (2004) Creative Knowledge Pool,
Prepared by Tom Fleming Creative Consultancy
- DCMS (2000) Creative Industries: The Regional Dimension
- DCMS (2001) Creative Industries Mapping Document
- GLA Economics (2004) London's Creative Sector: 2004 Update
- London Development Agency (2003) Market Development Potential of the
Creative Industries in London
- London Development Agency (2005) Draft Economic Development Strategy for London
- London Development Agency (2004) Creative London
- Metaphor (2003) LDA Laurie Grove Creative Workspace, Final Draft Report



FEEDBACK FORM

Please use this space to record your comments and Hub ideas, then either:

- tear off and hand in at the meeting,
- post to CLA at 1 The Arches Resolution Way, Deptford, London SE8 4NT
- email your comments to hubs@creativelewishamagency.org.uk

Electronic versions of the document are available on the web site www.creativelewishamagency.org.uk and all the background papers are downloadable from www.creativelewishamagency.org.uk/hubdocs/

I would like the Hub to achieve

My vision for the Hub is

I think the biggest problem holding back creative sector growth is





My idea for a project that will help to grow the creative sector in the Hub area is

My biggest criticism of the whole concept is

Other comments

Key Players

The LDA has asked that we identify five key players, without whom the plan will not work. We would like them to be identified through the consultation process, so please make suggestions for all or some of the players.

1. _____

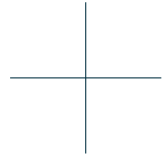
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3. _____

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5. _____





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