
Thames Estuary Production Corridor

A framework for North Kent & South Essex
FINAL REPORT

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Executive Summary

Since 2010, the number of creative businesses in the wider SELEP area has grown by 30.5%. The proportion of creative industries in the total SELEP business base is growing as well, accounting for 9.6% of total businesses in 2015, compared to 8.5% in 2010.

However, growth is below the national average, suggesting that the SELEP region is failing to maximise its obvious potential given its proximity and connectivity to London. The region risks missing out to other high profile and well supported areas such as the Northern Powerhouse.

The Creative Industries is the UK's biggest growth sector. Over 1.3m people work in the creative economy across the South East alone, and it is estimated that 1.2 million new workers will be needed in the sector over the next decade. However, the South East's preeminent position as a world capital of creativity is under threat as creatives, artists and entrepreneurs lack appropriate infrastructure for expansion.

Loss of workspace is a significant threat coupled with the increasing lack of affordable housing, particularly in London. Research by the GLA in 2014 found that over 30% of current London studios would disappear within five years.

The Thames Estuary Production Corridor vision addresses this urgent need.

The estuary offers competitive land and property values, buildings ripe for repurposing, coupled with the quality of life offered by its countryside, coast,

leisure and cultural offer. Creative entrepreneurs can utilise spaces that were abandoned by traditional industries in decline.

Alongside the need for workspace and housing, a skilled workforce will underpin success. 100,000 people work in creative jobs who live across the estuary, whilst the total number of creative jobs in the estuary is 55,000. This provides a significant untapped workforce to draw on, gives confidence to investors and demonstrates significant creative and cultural potential.

TEPC offers an opportunity to establish the estuary as a globally significant super-cluster for creative and cultural production, building on existing strengths. It will enable emerging clusters of locally-based creative entrepreneurs, to scale up, diversify and innovate to meet the needs of industry.

TEPC will differentiate its offer to a range of constituents:

- For policy makers - provide clear evidence of the value and importance of this sector and its specific requirements, highlight the policy barriers, propose and influence solutions.
- For creative industries and practitioners - support to access finance, be responsive and nimble, open doors and make the case, consider delivery vehicles for sustainable workspace.
- For investors - set out a clear, evidence based, compelling and engaging narrative, change mindsets about the estuary. Provide support to unlock difficult sites.

- For developers - give them confidence in the sector, demonstrate the benefits, show tangible results using case studies and exemplars.
- For stakeholders - support wider ambitions for placemaking, economic growth and skills development. Align with broader policies and objectives, bring creative solutions.

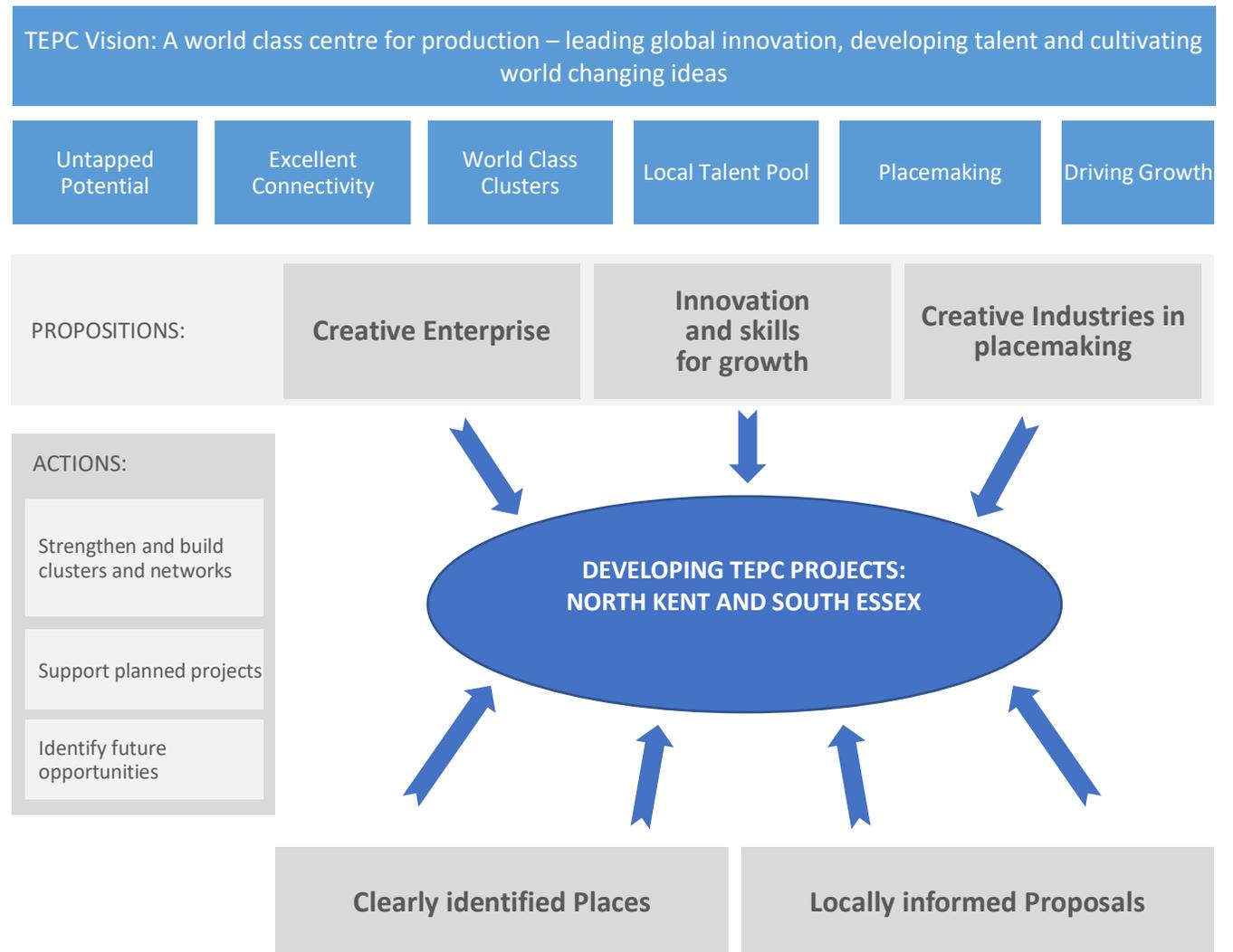
TEPC aligns with national and regional spatial, economic and creative industry policy priorities; most recently the **Thames Estuary 2050 Growth Commission's** final report endorsed the Thames Estuary Production Corridor. This alignment of national policy and local opportunities has accelerated buy-in, TEPC is supported by all 18 local authority Chief Executives in the Thames estuary area, recognising that it is a vital programme to:

- Meet a national demand
- Continue to deliver international impact
- Contribute to rebalancing the economy
- Find new uses for old land
- Strengthen and develop skills
- Fulfil the region's potential
- Tell a new story about the estuary
- Attract long term investment
- Plan strategically across geographies
- Create vibrant, energetic new places

The report presents a summary of findings, analysis and evaluation, moving towards a distinct vision for TEPC in South Essex and North Kent. It sets out what TEPC means for this region, bringing the vision to life for policy makers, creative businesses, stakeholders and future investors. It underpins and informs SELEP's contribution to the *Case for Investment*, which consultants Regeneris are developing for the entire TEPC area.

The draft framework:

- Identifies PLACES where the most traction and potential could be demonstrated. Basildon, Chatham, Ebbsfleet, Margate, Southend and Purfleet demonstrate particular strengths
- Is informed by testing and sifting PROPOSALS as they emerged
- Refines the PROPOSITIONS which are specific to South Essex and North Kent. Creative Enterprise. Innovation and skills for growth. Creative Industries in placemaking
- Initiates a PROJECT PIPELINE with close to 40 projects to support, test and develop further.





This report was commissioned by SELEP, Kent County Council and Thurrock Council, supported by a steering group comprising partners from SECEN, Essex County Council, Kent County Council, Thurrock Council, Thames Gateway Kent Partnership and Opportunity South Essex.

The strength of the partnerships, working across the estuary between North Kent and South Essex and with London colleagues is vital to TEPC future success.

Introduction

The Thames Estuary Production Corridor (TEPC) vision¹ launched in 2017, set out a clear ambition for the Thames estuary to become a world class centre for creative production - leading global innovation, developing talent and cultivating world changing ideas.

The Creative Industries is the UK's biggest growth sector, recognised within the UK Industrial Strategy and new Creative Industries Sector Deal as a key driver of the future UK economy. Over 1.3m people work in the creative economy across the South East alone, and it is estimated that 1.2 million new workers will be needed in the sector over the next decade in order for it to continue to thrive and meet demand.

London and the wider South East have played a key role in the growth and success of this sector as noted in a number of policies, studies and reports at local, regional and national level. However, there are significant risks to the vitality of the sector in this region, posed by rising land values, rents and business rates and increasing skills shortages.

“The South East’s preeminent position as a **world capital** of creativity is under threat as creatives, artists and entrepreneurs lack appropriate infrastructure for expansion. From a lack of film

studios, fashion manufacturing hubs and music production centres, there is a need for large, state of the art facilities with high speed digital connectivity and a strategic approach to skills development.”²

The Mayor of London, the London Economic Action Partnership (LEAP) and the South East Local Enterprise Partnership (SELEP), are working together respond to these challenges and unlock new growth opportunities in a coherent and collaborative way.

SELEP’s Strategic Economic Plan recognises the importance of a thriving creative economy. The South East Creative Economy Network (SECEN) was established in 2013 to accelerate growth in the digital, creative and cultural sector across the SELEP area. When comparing the region with other LEPS, SELEP is above average regarding its share of creative enterprises, ranking 13th of all 39 LEPS. However, growth is below the national average, suggesting that the SELEP region is failing to maximise its potential.

SECEN has been a driving force in advocating for TEPC, securing resources and ensuring that the initial vision can develop into tangible and deliverable outcomes for South Essex and North

¹ https://www.southeastlep.com/app/uploads/TEPC_VISION.pdf

² *ibid*



Kent. TEPC builds on this area's strengths, on existing clusters and cultural anchors, and on the ambition and vision of all of the partners. TEPC will nurture the assets and opportunities which are unique to this region and will be supported by and sit alongside SECEN's other works strands (see *Appendix 1*).

Working closely with the Greater London Authority (GLA), TEPC will support an ambitious cross-sector, cross-disciplinary approach to enable emerging clusters of high growth, locally-based creative entrepreneurs, to develop into strong, sustainable, nationally and internationally visible and connected clusters. TEPC will tackle the challenge in a range of ways, to nudge, encourage, support, enable and invest.

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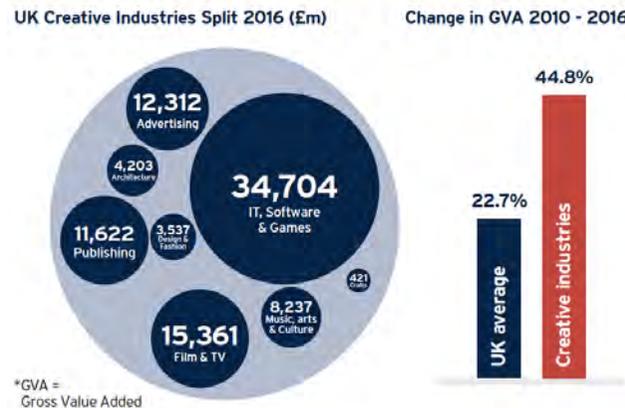
Creative Industries Production – an opportunity for growth for South East LEP

2.1. Creative Industry Profile

Between 2010 and 2015 local entrepreneurs added 3,500 creative businesses to the business base in the SELEP area, growing the sector by 30.5% to 15,000 businesses. Creative Industries in SELEP added nearly 10,000 jobs to the labour market between 2009 and 2014 with growth of 25% in employment. Both growth rates are more than twice the average for the area’s business and employment performance overall, and nationally distinctive.³

Creative industries account for £92bn of Gross Value Added (GVA), two million jobs and are growing twice as fast as the economy as a whole. Film and high-end TV alone attracted over £2bn of inward investment to the UK in 2017. The SELEP area has seen the fastest increase in the creative industries share of employment: 22.2% compared to just 12.5% across England and 15% in London.⁴

Creative industries at a glance since 2010



Value (GVA*) The UK Creative Industries 2016	Jobs The Creative Economy 2016	Exports (Services) UK Creative Industries Exports 2015
£91.8bn a year	3.04m jobs	£21.2bn annual service exports value
£10.5m an hour	1 in 11 UK jobs	9.4% of total UK services exports
7.6% increase in value since 2015	5% year on year growth	+44.3% growth in creative services exports since 2010

³ Creative Sector Impact Evaluation for SELEP. Shared Intelligence 2016

⁴ Images from Creative Industries Sector Deal

In an average year, the number of creative industry businesses introducing a new product is around 20% compared with only 9% for non-creative sector firms; and the GVA contribution generated by a creative professional is almost double the average GVA contribution of an employee across the wider economy in Essex and Kent.

The SELEP's strategic location is particularly relevant to the creative sector and is attractive for the relocation of creative businesses and practitioners. London has seen the highest growth in this sector, however in recent years the rise in workspace prices and living costs, are prompting creative specialists to move out of the city. This has been particularly notable in Medway, Margate and Southend⁵. *Thanet's New Wave* report published in 2017⁶ calculated a remarkable 84% growth in the district's creative business sector between 2013-2017.

Working in partnership with London, there is a unique opportunity to build a creative production corridor of international standing with excellent routes to international markets, establishing the estuary as a powerful and unique brand, to rival the Northern Powerhouse or Midlands Engine.

The UK's creative entrepreneurs are utilising spaces that were abandoned by traditional industries in decline, mitigating the negative degeneration impacts which can accompany the collapse of large industries. Creative practices can help re-build a sense of place and identity for areas in decline due to the loss of employment in traditional sectors,

particularly pertinent for the estuary. Industrial heartland, nationally important heritage sites, protected wildlife and acres of open marshland sit alongside seaside fronts and London commuter towns. A resourceful and inventive creativity that comes from being on the margins whilst so close to a major world city brings vibrant subculture, entrepreneurialism, fashion and music.

Partners, planners and developers must consider how best to maintain and protect the geographic distinctiveness and the attractive qualities that bring people to the estuary. Consider how to protect the aesthetic of the estuary, the 'edgeness', which is a key part of what makes it unique and attractive. This is vitally important for the sector and further contributes to the strength of TEPC as a distinctive brand.

Almost 95% (94.8%) of creative industries businesses are micro businesses (less than 10 employees). 68.6% of creative industries businesses have a turnover of less than £100,000, which is higher than the 55.2% for UK businesses a whole. The priority for the sector is scale, helping the SMEs and entrepreneurs that overwhelmingly make up the sector to grow and raise productivity. Research undertaken by Shared Intelligence for SELEP⁷, shows that freelancers make up 44.2% of labour market within creative industries, compared to 11.5% in overall labour market across SELEP.



2.2. Strength, assets and potential in North Kent and South Essex

Historically the Thames estuary has supported London's growth, supplying raw materials, workforce, industrial space and housing. More recently, London's rise in workspace cost and limited headroom for growth, alongside Essex and Kent's relative affordability and quality of life has drawn creative talent eastward into the Thames Estuary.

TEPC can offer what the sector needs, space to grow, affordable places to live and work, quality of life. There is already clear evidence of people moving out of London to places such as Southend, Medway and Margate, who demonstrate higher

⁵ Thames Estuary Production Corridor, Evidence Encyclopaedia. Regeneris 2018

⁶ Thanet's New Wave 2017. MACH

⁷ Creative Sector Impact Evaluation for SLEP. Shared Intelligence 2016

than average growth of creative freelancers and creative start-ups⁸. This organic growth has in turn attracted new talent, energy and investment, creating local responses to the creation of workspace and facilities, developing skills, innovation and networks and new businesses opening and flourishing.

Key cultural anchors, such as Metal in Southend, the Royal Opera House in Purfleet, Chatham Historic Dockyard and Turner Contemporary in Margate have well established links across the estuary and along it, connecting into and out of London and internationally. The workforce and the training and education providers are equally well connected, keeping the industry supplied with the talent and expertise it needs to sustain growth.

TEPC offers an opportunity in terms of the wider supply chain that could benefit from the development of the production corridor concept. North Kent and South Essex have strengths in manufacturing, logistics and construction, opening up a range of growth opportunities for businesses not currently active in this sector.

The Thames Estuary's key assets include:

- **Strong economic links.** London-based companies rely on Essex and Kent to support their supply-chains and their access to markets. The freelance and SME sector already have excellent relationships, serving London and international businesses. Rapidly improving superfast broadband, can provide the conditions necessary for these creative businesses to thrive

and for clusters to gain greater visibility and impact.

- **Transport links with London.** For businesses based in the estuary, seeking easy access to mainland Europe and the capital there are excellent rail links including HS1, Coast to Capital and proposed extension of Crossrail extension from Bexley to Ebbsfleet. Margate is only 90 minutes to St Pancras whilst Liverpool Street to Southend takes under an hour. Journey times from Basildon and Gravesend are under 40 minutes and the new communities in Ebbsfleet are 17 minutes from central London. Locating cultural infrastructure close to transport hubs should be a priority. Access to markets and collaborators for the exchange and flow of skills and innovation is essential.
- **A good value location** with relatively affordable industrial land and property values which are still competitive, balancing cost of living with access to opportunity and quality of life. Average rental values for office space in the TEPC is £31 per sq. ft – north Kent and south Essex have significantly lower average rental values of £14 and £12 per sq. ft. respectively. Industrial space is spread relatively evenly across the core area. Average rental values for industrial space in the TEPC is £9 per sq. ft – it ranges from £7 per sq. ft. in north Kent to £10 per sq. ft. in the London boroughs.
- **A high-quality location** This region offers sea, open countryside, heritage, and industrial landscapes, complemented by world class

cultural attractions which are all cited by artists and creative professionals as reasons why they choose to settle here. These are distinctive and authentic places with a vibrant cultural offer to attract and retain creative industries.

- **Potential future workforce:** Research shows that there are significantly more people who live in the TEPC region and work in the creative industries than there are creative jobs across the area.⁹ This pool of talent offers a strong and reassuring message to incoming industry.
- **Skills and training:** There are long term challenges for this sector which TEPC is ideally positioned to respond to. Recent reports and studies from the Creative Industries Council, CC Skills and Creative Industries Federation, have highlighted a growing skills shortage nationally. With FEIs specialising in creative industries training, the National College for the Creative and Cultural Industries in Purfleet and investment in skills through SECCADS, the future workforce will be well trained, economically, socially and culturally diverse.
- **Research intensive HEIs, highly specialised FE institutions.** This region has universities specialising in creative education, digital innovation and research, with a track-record of successful collaboration. University of Essex and University of Kent are ranked in the top 25 in the UK in TGUG 2018; top 20 in REF 2014; and 'Gold' in TEF 2017. University for the Creative Arts was placed in the top 25 in The Guardian University Guide 2018.

⁸ Thames Estuary Production Corridor, Evidence Encyclopaedia. Regeneris 2018

⁹ Regeneris Evidence Encyclopaedia, Cultural Sector Baseline

- All of these institutions share TEPC’s ambition to develop and retain talent, providing routes into well paid employment via graduate training and incubation. An increase in collaboration between cultural organisations, creative businesses and the HE and FE will be a vital enabler for TEPC success, unlocking talent and innovation.

2.3. Policy Context

TEPC aligns with national and regional spatial, economic and creative industry policy priorities, particularly; Culture White Paper 2016, Creative Industries Sector Deal 2018, London’s Creative Economy and Cultural Policy, SELEP Strategic Economic Plan and Prospectus for the Creative Economy, led by SECEN. This comprehensive policy context has helped to drive the development of TEPC and will underpin its future success. A brief description and links can be found at *Appendix 1*.

The South East LEP – Strategic Economic Plan (2014) set out its aim to improve productivity and economic growth in the region, noting two key issues that challenge this aim. Firstly, the SELEP economy is not as strong as other economies in southern England, with a slow rate of growth in terms of output. Secondly, there is a skills deficit amongst residents of the region, particularly in terms of higher-level skills. The Plan identified a number of corridors of growth to build on existing strengths and act as key drivers of economic prosperity in the region, including the Thames Estuary, the A13 Corridor and the A127



Corridor. SELEP recognises the importance of the creative and cultural sector, identifying it as one of its priority sectors.

SELEP’s **Strategic Economic Plan Refresh (2018)** has continued to position the creative industries as a priority sector. There is clear alignment between the TEPC vision and the LEP’s strategic ambitions in support of skills development, entrepreneurship, business growth and increased productivity, through support for workspace and bespoke business support.

Most recently the **Thames Estuary 2050 Growth Commission** final report endorsed the Thames Estuary Production Corridor. A key element of the work undertaken over the course of this consultancy, working closely with GLA colleagues, was to ensure that TEPC was well positioned and recognised by the Commission. It was encouraging to note support for the vision within the report.

“The Greater London Authority and South East LEP already has a particular emphasis on east of London out to the Estuary as a significant Production Corridor. It wants to focus on its strength in cultural and creative industries to deliver new investment and jobs. Taken alongside other significant sectors in the Thames Estuary, including ports and logistics; construction; and health and medicine, there is real potential to ensure that its ambitions are realised”.¹⁰

The Commission notes that in order to deliver the vision, the estuary cannot be considered as a single functional economic area, rather a “tapestry of interconnected but different economies, places and people”. It goes on to recommend a “structure of five ‘productive places’, based on existing areas and their assets; with a clear vision for each area.”¹¹

Following the launch of the Commission’s report in July 2018, Government committed to working with the partners across the estuary to develop a response to the report within 6 months. The partners’ response is focused working together to create a single voice for the estuary and to effectively engage with government.

¹⁰ ibid

¹¹ Thames Estuary Growth Commission: 2050 Vision. June 2018

2.4. Momentum

This alignment of national policy and local opportunities has accelerated buy-in. TEPC is supported by all 18 local authority Chief Executives in the Thames Estuary Area underpinned by:

- An understanding that creative and cultural industries have significant economic value.
- They are likely to be more resilient than other sectors to future challenges, such as automation.
- Their impact greatly enhances perception of places by visitors, residents and investors.
- Effective structures and partnerships are in place and moving this work forward, including SELEP, TGKP, OSE, SECEN and the Kent Cultural Transformation Board.
- Support and endorsement for TEPC by Thames Estuary 2050 Growth Commission.
- Clear alignment with the ambitions described in SELEP's Strategic Economic Plan Refresh.

2.5. Towards the Case for Investment

This report presents a summary of findings, analysis and evaluation, moving towards a distinct vision for TEPC in South Essex and North Kent. It sets out what TEPC means for this region, bringing the vision to life for policy makers, creative businesses, stakeholders and future investors.

The following section identifies the first iteration of opportunities and projects and sets out a draft framework. This will underpin and inform SELEP's contribution to the *Case for Investment*, which consultants Regeneris are developing for the entire TEPC area. Their aim is to create a compelling case to attract large scale investment to the Estuary, highlighting potential schemes, areas and opportunities, ensuring that TEPC is positioned to capitalise on funding from a range of sources.

The *Case for Investment* will provide clear evidence of need and identify gaps in the market, as well how to plan for and deliver state of the art production and manufacturing facilities in the Estuary. It will explore the skills, space and wider infrastructure needed to support the growth of the creative economy over the next 20-30 years, and strengthen this unique cross-regional partnership.



3

A framework for South Essex and North Kent

In order to have a period of productive consultation and engagement, a set draft propositions, developed with the project steering group, were circulated widely to organisations and networks.

These propositions (see *Appendix 2*) used the TEPC vision as a starting point, as well as drawing on the consultant's expertise and experience of the sector, desk research and local insight from partners and consultees. They acted as a catalyst, encouraged partners to bring their own plans and proposals to the discussions whilst also acting as an advocacy tool for TEPC and helping partners to understand the opportunities and ambition.

PROPOSITIONS

PLACES

PROPOSALS

PROJECTS

3.1. Refining the PROPOSITIONS

The draft propositions provided a concrete way for partners to understand the TEPC vision, make sense of it in their own their locality and align it with their projects or strategic ambitions. The Propositions were particularly useful in testing and drawing out political will, local traction, ambition, scale and growth potential.

Throughout the consultation and research phase the propositions have been refined, informed by direct feedback and through the proposals which came forward.

Proposition 1. Creative Enterprise

To retain and attract creative businesses to the area by offering permanent, affordable workspace, business and skills support, excellent transport and digital infrastructure and a pro-creative economy planning regime. Enable access to finance via existing finance and loan schemes and attract new investors and capital. This proposition meets an acknowledged need for more good quality commercial space across the Estuary.

- Cluster development and business specialisation
- Super-networked series of production spaces across the estuary
- Strengthen and develop projects and better connect them to one another.
- Nurture and attract scalable businesses
- Cultivate global anchor companies and organisations
- Commercial space and developments to support this sector.

At this stage, no firm position has been reached on whether a formal *Creative Enterprise Zone* is the way forward. The learning to come from the London pilot will provide useful insights.

Proposition 2. Innovation and skills for growth. Co-location.

Support schools and FE providers to ensure the continued supply of local talent, well equipped to join industry and contribute to its growth. Capture and benefit from the innovation and research activity of universities and consider their role as key employers for the creative industry. Increase access to the specialist facilities and equipment within these institutions, encouraging and enabling them to become more porous and accessible. Advanced manufacturing companies that thrive will innovate and create new products, requiring the skills and contribution of creative professionals.

- Encourage and facilitate collaboration and co-location, maximising opportunities for cross sectoral work
- HE and FE institutions to act as anchors and catalysts
- Provision of sector specific training & facilities and research & enterprise activity.
- Access to specialist facilities, equipment and expertise for freelancers and micro-businesses.
- FE developing sector-specific and responsive programs

Proposition 3. Creative Industries in Placemaking

The creative industries have already proven to be powerful drivers in regenerating individual cities and neighbourhoods, creating vibrancy and distinctiveness, strengthening town centres and in changing and improving the image of this area and external perceptions of place. These arguments have been key in securing support at local government level. In particular:

- Re thinking high-streets, their purpose and function.
- Investing in workspace on the high street, increasing footfall.
- Developing a well-defined, confident and creatively exciting Town Centre offer.
- Influencing the design of new towns and settlements which attract the creative sector.
- Build the profile of the Production Corridor as an attractive destination for creative business

Most recently this was clearly seen in Hull who secured the UK City of Culture title in November 2013 with a story of “a city coming out of the shadows”. The event was a unique chance to shed Hull’s image as a declining and deprived port city and to build a new profile as a vibrant cultural city.¹² The evaluation states that 3 in 4 visitors to Hull in 2017 said that it had changed their perception of the city for the better.¹³

¹² Cultural Transformations: The impacts of Hull UK City of Culture 2017. March 2018

¹³ ibid

3.2. Identifying PLACES

As individual projects, sites and opportunities came forward, combined with existing intelligence and new data provided by Regeneris, potential creative production clusters became evident. Testing and sifting the propositions, structures, opportunities and potential, as well as extensive site visits across the full North Kent and South Essex Thames Estuary area helped to further build a picture of TEPC potential. A full list of the initial ideas is presented, as they were received, at Appendix 3.

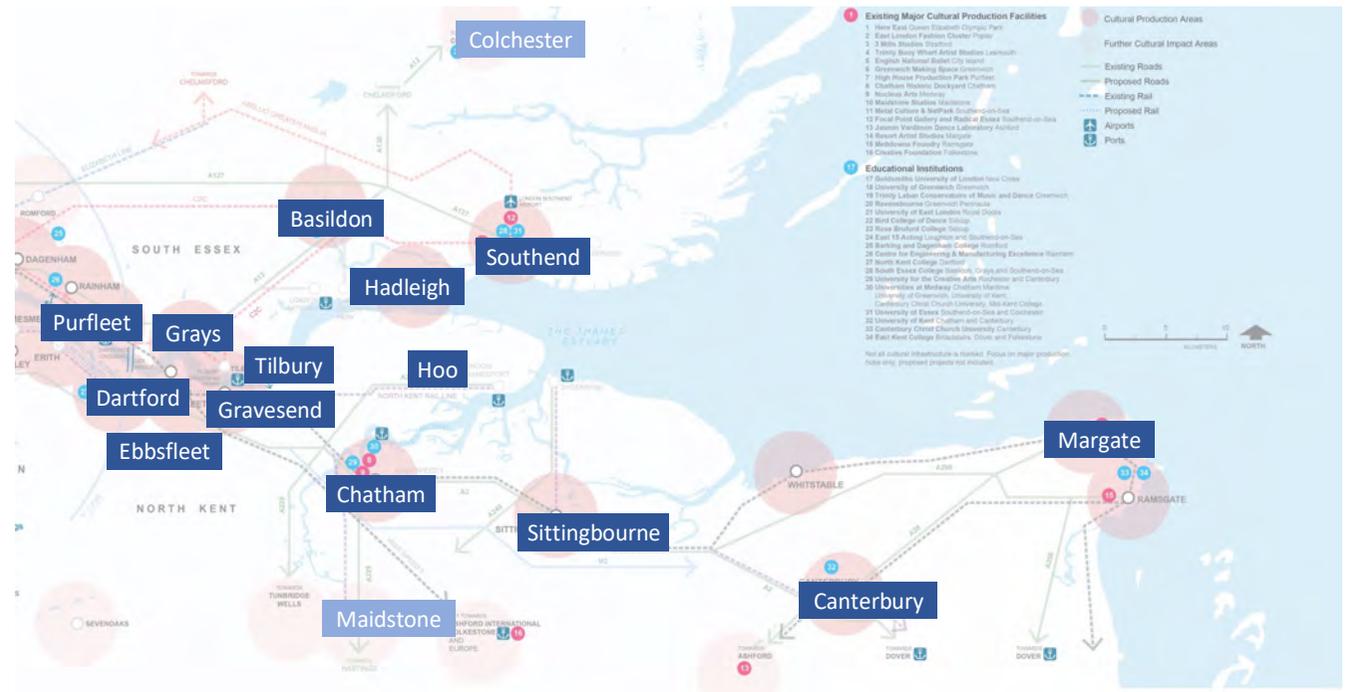
This gave us a number of places where most traction and potential could be demonstrated and where the following could be seen:

- opportunity to build upon existing cultural anchors and clusters of creative production
- sites offering potential for sector growth with supportive infrastructure
- a range of partners have indicated support or TEPC
- alignment with local cultural, spatial and economic development strategies
- ambition to be part of TEPC

From this initial review, Basildon, Chatham, Ebbsfleet, Gravesend, Margate, Purfleet and Southend demonstrated particular strengths; locations, breadth and range of projects as well as political and institutional ambition. They offer the most immediate opportunities to deliver TEPC.

Other locations such as Grays, Hoo, Hadleigh and Sittingbourne offer the potential for future development and are included in the map above.

Maidstone, Ashford and Colchester are included to ensure the benefits of existing networks, key projects, expertise and partnerships can be captured, however in line with the approach set out by Regeneris, this report focuses on the core TEPC geography.



3.3. Identifying and developing the PROPOSALS

Partners were encouraged to come forward with proposals and sites and possible projects. A full list of those initial ideas is presented at *Appendix 3*.

Not all are at the same state of readiness. Some lack skills, capacity or organisations who can lead the work. Not all are large scale, however the intention to build towards that ambition and vision is well supported. Partners driving the TEPC work forward recognise that small and medium scale projects will be important, acting as a catalyst to deliver large scale impact across the region.

The added value that TEPC can bring will be in developing interconnected projects with impact, which create momentum, increase visibility and develop supply chains.

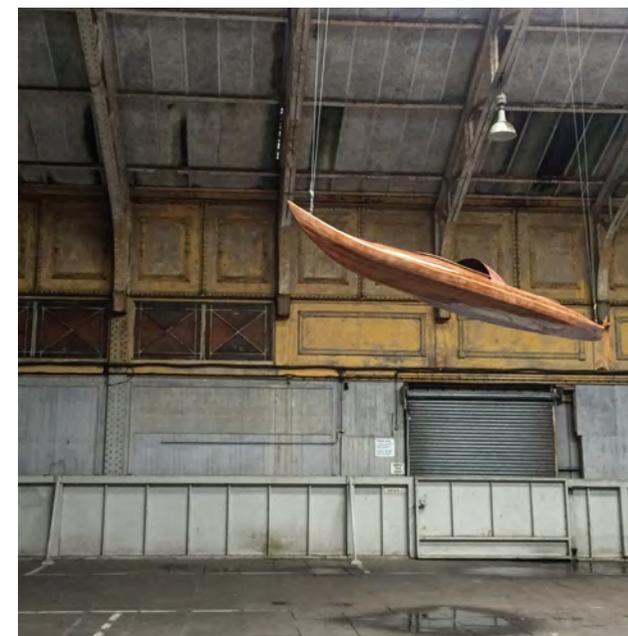
To further develop these initial concepts, recommended actions include:

Build and Strengthen: Scale up existing and emerging clusters, increase their profile, impact and sustainable growth. Support sector growth more generally as a key part of the move to larger scale.

Improve and enhance access to supply chains for clusters and networks through greater visibility.

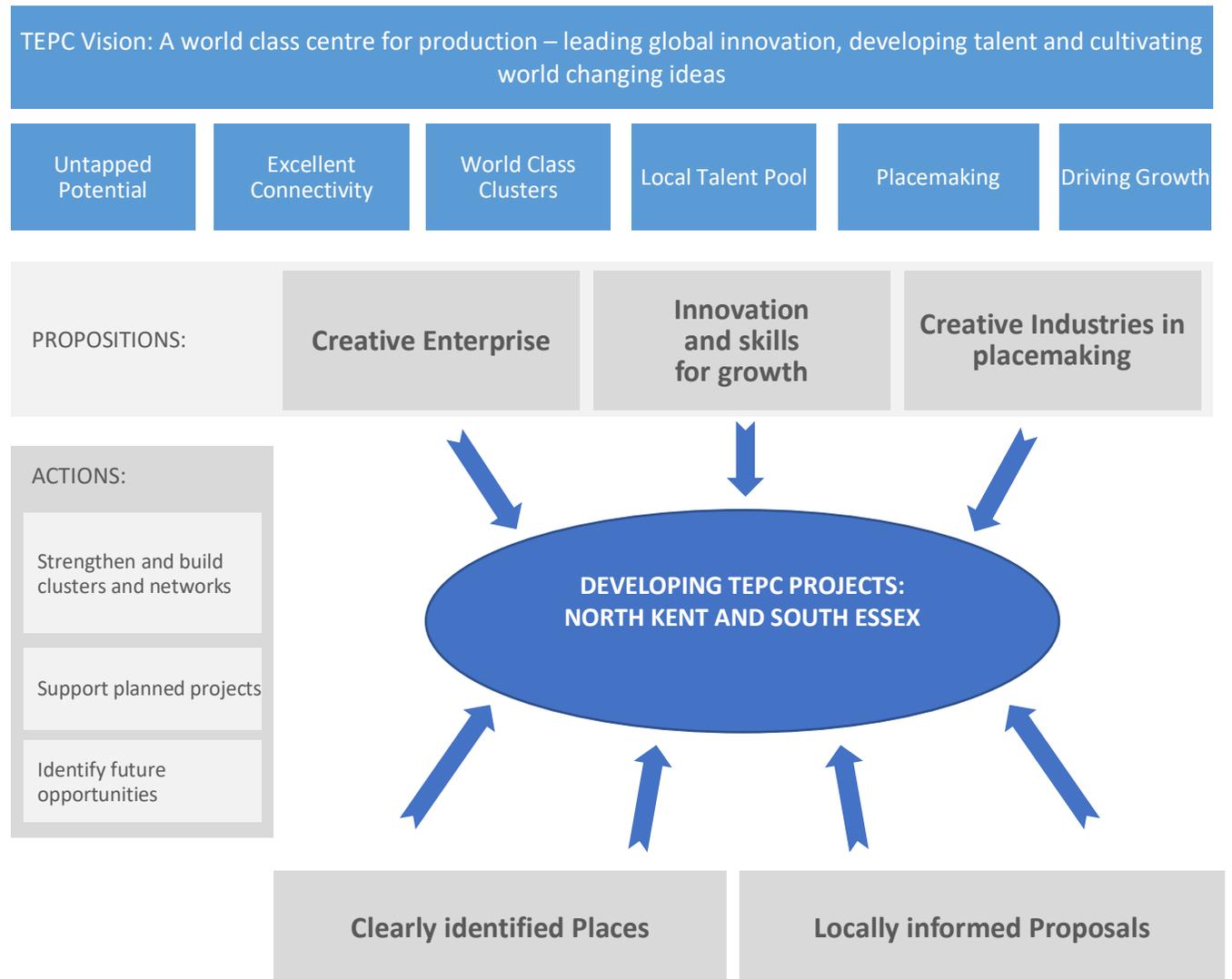
Support for planned projects: Embrace planned, large-scale projects under the TEPC 'brand', give support and enabling tools where required, help to secure investment, support through planning policy and connecting to workforce and skills.

Future impact: Identify and confidently pursue projects or partners in a particular sector or location. Support consortia or partnership development to work up proposals. Identify and use advocates and influencers on the boards of cultural organisations and developers. This action will rely on the work and insight from *Case for Investment*.



3.4. Framework

The Framework brings together the criteria offered by the Places, Propositions, and Proposals set out under the overarching TEPC vision, giving partners confidence in how best to support projects and take them forward. TEPC projects will demonstrate that they have the potential to deliver sector growth, with appropriate infrastructure in place and with local traction and support.





3.5. Projects

Bringing together Propositions, Places and Proposals as well as an indicative timescale, leads to the first iteration of Kent and Essex projects which at this stage have the most potential for delivering creative enterprise, skills and innovation, placemaking. These projects are indicative and will require further testing and analysis over time.

With a range of projects at varying scales, states of readiness and development it is clear that the region offers potential. Some are well underway and already have the potential to contribute to the TEPC 'story' and emerging brand.

This list of projects will require flexibility as the TEPC project develops, and are indicative of the momentum within the sector. It may support the TEPC steering group, Regeneris and wider partners to identify and work towards a programme of investable proposals.

PROPOSAL	PARTNERS	PLACE	PROPOSITION		
			Creative Enterprise	Innovation & Skills	CCI role in Placemaking
Project underway or close to being so. Timeline for delivery, short to medium term					
Basildon Town Centre. South Essex college relocation, town centre site, courses to have creative media & digital focus, merger with PROCAT underway. Shopping centre owner looking at creative industry-led vision, building on Futurecity proposal for digital-led cultural / placemaking vision.	South Essex College, Eastgate	Basildon	*	*	*
Innovation Warehouse, Watt Tyler/town centre: Digital and creative media co-working space and makerspace – feasibility study undertaken, business plan is in development.	Basildon Council	Basildon	*	*	
North Kent College - Miskin Centre. Capital plans - responsive to sector skills needs (theatre and event production, circus). Willing partners, previously worked with Bexley on Borough of Culture bid, good links to London and supply chain	North Kent College. Dartford and Bexley councils.	Dartford	*	*	
High House Production Park: Three gap sites. Ambition to complete HHPP and deliver creative workspace, greater levels of activity and footfall, align to wider Purfleet regeneration. Build on anchor 'brands', ROH, CC Skills, ACME.	Thurrock Council, HHPP	Purfleet	*	*	*

Quartermaster Studio , proposed 1,000,000 square feet of film and TV production studios (ambition to open 2022) – part of wider Purfleet town centre re-development, align to HHPP and potential to link to Dagenham film studios.	Purfleet Centre Regeneration Ltd. Thurrock	Purfleet	*	*	*
Forum 2. Creative industries hub in town centre - Digital incubator, music technology, workspace and skills programme. Planned and will be underway. Can make an immediate contribution to the TEPC story, establish the 'brand'	Focal Point, University of Essex, South Essex College, Southend Council	Southend	*	*	*
New Studios, Beecroft. Conversion of previous site of Beecroft Gallery in 20 studios and project space. Responding to increased local demand for workspace. Key element of networked workspaces.	Focal Point, Southend Council	Southend	*		
Airport Business Park Southend. Large scale commercial development to address current deficiency of high-quality employment land and premises. Scope and interest to explore CCI element within proposed 2,600 sqm Innovation Centre due to open 2019 which will provide flexible space for entrepreneurs, small businesses and inward investors.	Southend Council, Rochford Council.	Southend	*	*	
Tilbury Cruise Terminal – large potential site. Strong leadership from Tilbury on the Thames trust. Well-developed business plan and vision. Full feasibility undertaken for artist studios and workspace. Relationship with Kinetica also Anglia Ruskin University. Phase one: ex-railway station building for workspace and training.	Tilbury on the Thames Trust	Tilbury	*	*	*
Estuary Festival 2020 - festival delivery and associated production needs – both sides of river. Potential link to plans for Tilbury Cruise Terminal	Metal, Whitstable Biennale	Various	*	*	*
Union Crescent - Jonathan Viner building 10,000 sq feet. Works underway. To include Carl Freedman gallery space and print publishing, Tracey Emin studio and other CCI workspaces.	Union Crescent Property	Margate	*	*	*
RESORT Studios. currently occupy Pettman Building - property has been sold, early conversations with new owner suggest not imminent threat to RESORT, but long-term sustainability needs to be addressed. Strong links to London markets and outline plan for a London presence / flexible workspace/ meeting facility to increase visibility of Margate workforce, access to markets and business growth	RESORT, Thanet DC	Margate	*		*
Chatham Dockyard 'Interface land' . New proposal, building on the work undertaken for Channel 4 bid. Mix of workspace, university research, teaching and learning, student accommodation, public facing activity.	Medway Council, University of Kent, CHDT	Chatham	*	*	*

Developing concept, some partners engaged. Timeline for delivery: medium - long-term

Centre for Contemporary Dance (The Place, London based NPO), working with University of Kent and Chatham Historic Dockyard, to enable expansion of student numbers and broader range of courses to include training/production or dance. Aligns with dance focus in Chatham at The Brook	The Place, Uni Kent, Medway, CHDT	Chatham	*	*	*
Institute for Creative and Cultural Industries , University of Kent. Focus on digital cultural content. Maximise relationships with Dovetail Games, KMTV, creative digital content. University's Executive Board has approved the concept. Further work to define the proposal needed. City of Culture possible catalyst/enabler.	University of Kent, Medway Council, CHDT	Chatham	*	*	*
Ebbsfleet Central . Cultural visioning work underway (Marc Jaffrey). EDC welcome TEPC conversations. Recent appointment of commercial property firm, GVA, to develop Ebbsfleet Central - nine million sq ft mixed-use scheme which will act as the gateway to Ebbsfleet Garden City. To include health and innovation campus	EDC, GVA, Dartford Council, Whitstable Biennale	Dartford	*	*	*
Henley Building / Northfleet Embankment area – Whitstable Biennale ambition to develop multipurpose work space, 20-25 studios (at least 8000sq/ft) and production facilities. EDC actively supporting.	Ebbsfleet DC, Keepmoat, Whitstable Biennale, LV21	Gravesend	*	*	*
Old Fire Station Hadleigh. ACAVA have studios, Essex CC have library and Castle Point own land. Town Centre position. ACAVA seeking sustainability first, before further growth.	ACAVA, Castle Point	Hadleigh	*		*
Thameside Centre . Currently theatre and library - potential to rethink uses, including workspace. Become centre for production and delivery. Note town centre location and plans to remodel Grays High street	Thurrock Council	Grays	*		*
Purfleet Centre . Planned additional HE presence through partnership with London Southbank University - strengthening links between wider estuary and London - "mini University campus focusing on healthcare, creative and business entrepreneurship".	Purfleet Centre Regeneration Ltd. Thurrock	Purfleet		*	*
Sheerness Dockyard Church which has secured £4.47m HLF funding (£4.25m subject to conditions) has secured planning permission - community-led project to transform the building as a hub for business, arts and tourism	Swale BC, Sheerness Dockyard Trust	Sheerness	*		*
Better Queensway . Significant remodelling of town centre, potential to influence re the provision of workspace and considerations about public, realm and placemaking in line with Southend's ambitions to attract, grow and retain CCI business.	Southend Council, Metal, Focal Point	Southend	*		*

Metal. Southend as a "creative campus". Build on Metal's programme of residencies, support for production, education and skills. NetPark demonstrates impact of digital connectivity as enabler. Bring attention to Literature & Music production. Connect with partners, workspaces and venues across Southend, building visibility and strengthening sector. Utilise Metal's national and international relationships	Metal, Focal Point, Southend Council	Southend	*	*	
Southend High Street. Developing ideas around new uses and activities for high street. Potential to consolidate dispersed workspaces, scale up, increase visibility, possible CPO empty shops. Could act as catalyst/proof of concept for larger scale project and for this type of active intervention by local authority	Metal, Southend Council, Focal Point	Southend	*		*
Future ambition, not yet firmly developed. Timeline for delivery: long term					
Nucleus - developing music production facilities, building on prior programme and demand. Trafalgar Centre was mentioned as potential building, may no longer be available. Nucleus have track record of managing workspace and developing associated skills and training.	Nucleus, Ideas Test	Chatham	*		
Chatham Intra. Area of land/buildings close to river, includes ad-hoc studios (Hulks Yard), Featherstone building, much privately owned - could be part of a cluster to include Sun Pier House. Potential Quinn Estates development. Coastal Communities bid could drive concept forward and escalate delivery	Medway Council, Quinn, Sun Pier,	Chatham	*		*
Dartford Northern Gateway development sites - mixed ownership. Next iteration of Local Plan in development, opportunity to influence, will need workspace as part of the mix. Council interested in CCI as part of the plans.	Dartford DC	Dartford	*		*
Bata Factory. Derelict building, some adjoining buildings (office and business units) have been refurbished and developed as generic workspace offer Thames Enterprise Centre. Iconic architecture which would suit and be attractive to CCI sector	none	East Tilbury	*		*
Chatham Waters. Large scale development, housing and employment. Site includes UTC specialising in construction and engineering Peel Ports have track record (Salford) in supporting CCI. Not yet part of their vision for Medway. Planned theatre/performance space "EventCity"	Peel Ports, Medway	Gillingham			*
Gravesend Canal Basin - Milton industrial area. Series of low value but fully let industrial spaces - builders' yards, mechanics, scaffolders etc. Long term development site - could	Gravesend BC, Cohesion Plus, LV21	Gravesend	*		*

influence. Includes residential barge marina. Ambition by local partners including Cohesion Plus and LV21 to develop production facilities for outdoor arts/mela/carnival					
Hoo. New settlement, larger than Ebbsfleet. Local Plan development will set out full scale. HIF funding secured to support enabling infrastructure. Medway Council ambitious plans for high quality development to include high value employment, creative industries firmly in as a driver for economy	Medway Council	Hoo	*		*
Sands Heritage. Ambitions to develop large scale STEM facility in Margate – has identified land, in discussion with KCC. Co-location of creative businesses a possibility – keen to continue conversation.	Sands Heritage Ltd			*	
Sheerness Docks. Significant unused historic buildings. Heritage England keen for refurbishment and re-use.	Peel Ports, Swale BC,	Sheerness	*		*
Ideas Test Developing strategy for long term sustainability of the organisation to include developing revenue and activity relating to creative workspace. Currently located in Sittingbourne, discussions include Medway. Indication from Arts Council England new CPP areas in north Kent, which could open up geographic reach	Ideas Test, Swale, Medway EDC	Sittingbourne	*		
Swanscombe peninsular. Large site, potential that London Resort Holdings will not bring development forward, in which case Dartford BC and Ebbsfleet Development Corporation to think about alternative development.	Ebbsfleet DC, Dartford BC	Swanscombe	*		*

3.6. Enablers and Drivers

Alongside the work to capture locations, partners, sites and opportunities, this work has also begun to identify enablers and drivers which will underpin and contribute to the success of the TEPC ambition.

Broadly, these can be grouped under Finance, Infrastructure, Policy Levers, Capacity and Networks. More detail is set out in the table below, with an indication of how they might be taken

forward and supported. Several have been highlighted in the Regeneris work to date and will form part of their final report and recommendations.

FINANCE		How
Clear offer to investors	Establish credible and 'investible' partnerships and projects at scale.	Regeneris - Case for Investment. SECEN. Local partnerships; OSE, Kent Cultural Transformation Board, TGKP
Access to finance	Make information on available funding and financing options readily available to the sector and develop expertise on how to position business appropriately. Work with funders and investors to develop a better understanding of business models of creative businesses.	Better communicate to sector, utilise existing networks, SECADDS. Influence KMEP, OSE. Arts Council England DCMS
Investment	Secure public sector investment to support and enable risk. Pipeline of projects towards future government funding schemes.	TEPC steering group and partners. SECEN. LEP.
INFRASTRUCTURE		
Digital connectivity	Link more closely with and support bids for investment in digital infrastructure. Note where there are bids/projects (eg South Essex Fast Fibre), TEPC can add extra weight.	TEPC steering group members connect locally.
Secure and sustainable tenure	Establish ways of enabling and incentivising local authorities to protect spaces for creative businesses. Community Land Trust model, workspace development vehicle, affordable loan financing to enable small organisations to purchase buildings.	Regeneris report. TEPC steering group. OSE and TGKP influence spatial plans. Learn from GLA Cultural Infrastructure Plan
Secure large sites	Learn from the London model of Opportunity Areas, encouraging local authorities to work proactively to make their land holding available. Develop planning tools which encourage making space available. Identify sites where there is still time to 'get in early', influence masterplans, Local Plans, key development sites.	OSE & TGKP - align TEPC needs to intelligence on commercial land and sites. Inward investment orgs.

POLICY LEVERS		
Planning policy	Develop enabling planning policy. Draw on London's work underway towards; Cultural Infrastructure Plan, Creative Enterprise Zones. Influence Local Delivery Plans and wider spatial planning such as South Essex Joint Strategic Plan	TEPC steering group. GLA partners via Regeneris. OSE, TGKP
Skills and training	Working with schools, FE, workplace learning, HE and Continual Professional Development. Establish a skills strategy for the Creative Industries in the region.	SECEN. Local partners incl. ROH Bridge
PARTNERSHIPS/CAPACITY		
Consortia Development	TEPC to build consortia and proactively support partnerships who identify proposals and potential investment.	TEPC steering group. TGKP, OSE, Kent Cultural Transformation Bd.
Leadership and capacity	TEPC resource to nurture and support with skills or capacity to drive this work forward in places where there is ambition and potential, but limited expertise or organisational capacity.	SELEP, SECEN, TGKP, OSE.
Structures and governance	Develop a more rigorous programme management approach – a pipeline of projects.	Regeneris. TEPC Steering Group
NETWORKS		
Networks	Encouraging businesses and other organisations to cluster together, either physically or virtually.	TEPC Steering Group, local partners
Connections to planned programmes	TEPC will be supported by a planned workstreams and investment such as SECADDS and Open Workspace study, Coastal Communities. SECEN continue to be the mechanism to maximize this support and investment, to deliver against Prospectus for the Creative Economy	SECEN

4

Conclusion and next steps

4.1. Conclusion

There is genuine energy behind this work. Over the six months of this focused work, consultation, presentations, research and discussion, there has been a marked shift in the way that TEPC is viewed.

TEPC is already being adopted and worked into partners' strategic plans, in order to secure backing for projects. That the TEPC vision already gives weight and connectedness that funders and policy makers might seek, is a demonstrable success.

A key benefit from this period of work has been the structure, capacity and single point of contact which the Project Manager role has brought. In the early stages, it was evident that beyond the cultural sector, and even within it, there was limited knowledge and understanding of TEPC. This has changed. TEPC has gained strong support and is now supported and signed up to by all of the estuary's local authority Chief Executives.

Key foundations for the successful delivery of the Thames Estuary Production Corridor are already underway. This includes recognition from the Thames Estuary 2050 Growth Commission of the work to date, plans for improved transport links, (Lower Thames Crossing, Crossrail to Ebbsfleet) and firm recommendations for further investment, plans to deliver affordable housing, a thriving knowledge economy and growing creative clusters. The report

highlights how TEPC will develop over the coming years.

TEPC has the potential to be one, a mix or all of the five pillars below. Each of these will require a different approach, scale of intervention and level of support:

- A strategic body that aims to get in the place the 'enablers' that work across the whole of TEPC such as investment streams; planning policy; drive for inward investment, skills.
- An investment body providing funding stream for specific projects.
- A regional network of supply chain and businesses.
- A brand / a concept to make it identifiable as a region.
- A collection of pipeline and existing projects.

At the highest level TEPC will continue to be about influencing decision makers, developing a network of advocates, and looking for long-term investment, whilst on the ground, partners will need to resource and support the delivery of individual projects and proposals. Making firm connections between these levels will be one of the factors that accelerators growth and impact

Capacity and skills are an issue for delivery. TEPC partners will need to help areas with less obvious potential to grow, taking a proactive role, putting them in a strong position to more readily access funding in the future. To ensure TEPC has impact across the wide SELEP region partners must maintain the principle of a porous edge. This includes but is not restricted to partners in; Maidstone, Tunbridge Wells, Colchester, Ashford, Folkestone and Chelmsford where there are significant CCI clusters, specialisms, research and successful models to learn from.

Governance and leadership for TEPC is still fluid and needs to be so, the Project Board who have been leading the work, will need to continue to be responsive and flexible, as well as comfortable proceeding with some level of uncertainty.

By January 2019, the Regeneris work will have concluded and a clear way forward and series of recommendations will be set out. Over the same period, responses to Government in light of the Thames Estuary Commission report and possible structures and opportunities will become clearer. At that point the partners will be in a better position to develop governance and management structures to deliver the ambitions of TEPC.

4.2. Next Steps

- Build on the framework set out (3) and agree a pipeline of projects, to be tested with Regeneris.
- Support the development of up to 6 projects from across Thames Estuary to kick start the TEPC 'brand' in North Kent and South Essex. These will be driven locally and feed into Regeneris work.
- Work into the enablers; in particular developing the TEPC narrative to test with planners and developers in order to secure supportive, proactive planning policy, identifying sources of finance and investment, agreeing model for governance and management locally, as well as across the full TEPC area.
- Go-sees - vital next step for steering group and for potential partners/developers; informative and aspirational and bringing the TEPC concept to life.
- Development and submission of a TEPC bid to Cultural Development Fund.
- Continue to advocate for the aspirations and ambitions of North Kent and South Essex within the wider TEPC work, in particular ensuring that the Regeneris work accurately reflects these areas.
- Manage ongoing enquiries, proposals and project ideas from partners and signpost and/or support their development.

APPENDICES

Appendix I: Policy Context

South East Creative Economy Network

The South East Creative Economy Network (SECEN) works to accelerate growth in the digital, creative and cultural sector. SELEP values the sector as critical to its economy as outlined in its Strategic Economic Plan. SECEN was established in 2013 to work with SELEP to identify barriers to growth and to implement practical and scalable initiatives for the Creative Economy in the South East. SECEN works to align the efforts of businesses, education providers, strategic organisations and local authorities to ensure that the South East becomes one of Europe’s most diverse, integrated and productive creative regions.

In 2015 SECEN launched its prospectus - Towards a National Prospectus for the Creative Economy in the South East

[https://www.southeastlep.com/app/uploads/SE_Prospectus_Low_Res_\(1\).pdf](https://www.southeastlep.com/app/uploads/SE_Prospectus_Low_Res_(1).pdf)

This prospectus considers the South East as a dynamic ecosystem rather than a city or a region, and sets out a portfolio of initiatives to establish the firm foundations of a self-sustaining, creative and cultural sector. The Network works through strategically positioned geographic hubs, as well as sharing knowledge and scaling-up network activity to add value on both a local and national scale.

South East Creative Economy Network have 5 key work streams:

Sector Specific Business support (led by Thurrock Council)

Workspace Development (led by East Sussex County Council)

Talent Accelerator (led by Creative and Cultural Skills and KCC)

Thames Estuary Production Corridor (led by Thurrock, KCC & Kent Cultural Transformation Board)

Cultural Tourism (led by Culture Kent and ESCC)

The Thames Estuary Production Corridor vision

http://www.southeastlep.com/images/uploads/resources/TEPC_VISION.pdf

The Thames Estuary Production Corridor (TEPC) will look to find the best ways to encourage the development of state-of-the-art production and manufacturing facilities in the Estuary. It will consider innovative ways to exploit strategic industrial land to support the growth of the creative economy, creating high-value, sustainable and future-proofed employment. It seeks to maximise the contribution that the creative industries can make to the economies of London, Greater Essex and Kent and to the UK. The ultimate aim of this work on TEPC, is to create a compelling case to attract investment to the Estuary, highlighting potential schemes, areas and opportunities.

Untapped Potential	Excellent Connectivity	World class clusters
A local talent pool	Placemaking	Driving Growth

Thames Estuary 2050 Growth Commission.

<https://www.gov.uk/government/publications/thames-estuary-2050-growth-commission-report>

The Vision: From an underperforming river region to a tapestry of 'productive places' along a global river.

By 2050, the Thames Estuary will be a tapestry of productive places along a global river. The Estuary will create 1.3 million new jobs and generate £190 billion additional GVA. At least 1 million new homes will be delivered to support this growth.

The Commission therefore recommends a different structure: a structure of five 'productive places', which are based on existing areas and their assets; with a clear vision for each area, a tight focus on priorities and stronger, streamlined governance.

In 2050, this tapestry of 'productive places' in the Thames Estuary will form part of the series of productive and connected places that 'orbit' London. Like Cambridge and Oxford, the 'productive places' of the Thames Estuary will be higher performing places, retaining their own distinct character and economic function.

The Vision is underpinned by six objectives. They provide further direction on how the Thames Estuary can boost productivity, make a greater contribution to the UK economy and deliver a series of positive outcomes by 2050.

- Productive places
- Connected places
- Thriving places
- Affordable places
- Adaptable places
- Deliverable places

SELEP Strategic Economic Plan (2014) - NB refresh underway.

<https://www.southeastlep.com/our-strategy/strategic-economic-plan/strategy-economic-plan-2014/>

Strategic Economic Plan Evidence Base - to inform the SEP refresh

<https://www.southeastlep.com/app/uploads/South-East-LEP-Strategic-Economic-Plan-Evidence-Base-FINAL.pdf>

Creative Industries Sector Deal

<https://www.gov.uk/government/publications/creative-industries-sector-deal>

In the Industrial Strategy White Paper, the government committed to making the most of the UK's strengths so that we can be at the forefront of emerging technologies and industries in the years ahead. The creative industries - including film, TV, music, fashion and design, arts, architecture, publishing, advertising, video games and crafts - are an undoubted strength of our economy, they are at the heart of the nation's competitive advantage.

The Creative Industries Sector Deal, an agreement between the government and industry concluded with the Creative Industries Council, seeks to unlock growth for creative businesses. It contributes to the Industrial Strategy's vision of good jobs, greater earning power for all, and prosperous communities across the UK.

The Sector Deal will invest more than £150 million across the lifecycle of creative businesses, including:

- places of the future - by funding leading creative clusters to compete globally
- technologies and content of the future - via research into augmented reality and virtual reality
- creative skills of the future - via a careers programme that will open up creative jobs to people of every background

The creative industries are at the heart of the UK's competitive advantage, and - in the face of technological transformation at home and new possibilities globally - represent a major strategic opportunity. Already booming, the creative industries are fast growing, and high exporting - both to the EU but also internationally. The 'soft power' influence of the sector means it has a critical role to play as the UK exits the European Union and we create a Global Britain.

Places

Developing more world-class creative industries clusters to narrow the gap between London, the South East and other regions.

- Support creative centre across the country, to enable clusters of world-class businesses to increase GVA and employment. Government will commit £20m over the next two years to roll out a Cultural Development Fund so that local partnerships can bid for investments in culture and creative industries, with industry contributing funding, networks and leadership.

Ideas

Sustain growth: achieve forecast GVA of £150bn by 2023.

- Open up Research and Development (R&D) funding to catalyse innovation. The Industrial Strategy Challenge Fund and industry will invest an estimated £58m to harness the power of immersive technologies and double the UK's share of the global creative immersive content market by 2025.
- Government will jointly invest £64m in an Arts and Humanities Research Council programme to deliver eight partnerships between universities and creative businesses across the UK, creating 900 business-led collaborations, 360 jobs and 65 new businesses, backed by a national Policy and Evidence Centre.

Business Environment

Sustain growth: forecast GVA of £150bn by 2023.

Boost job creation: higher than average growth rate implies 600,000 new creative jobs by 2023.

- Tackle copyright infringement, continue to address the transfer of value from creative industries and progress work on closing the value gap at the European and domestic levels. Convene online intermediaries and rights holders to consider the need for and agree new Codes of Practice in: social media, digital advertising and online marketplaces. Extend investment for the successful 'Get it Right' copyright education campaign.

- Reduce barriers to accessing finance for growth. The British Business Bank will seek to improve access to finance for high-growth firms outside London - including creative businesses - via a commercial investment programme to support clusters of business angels.
- Help creative firms access finance by investing up to £4m (subject to business case) in a programme of intensive business investment readiness support. `` Build on strong export performance to drive a Global Britain. We will create an industry and government Trade and Investment Board targeting a 50 per cent increase in creative industries exports by 2023.

People

Strengthen the talent pipeline to address current and future skills needs, as well as ensure that it is more representative of UK society.

- To increase the supply and diversity of skills and talent in the creative industries, government will make up to £2m available (subject to business case) to support an industry-led creative careers programme aiming to reach at least 2,000 schools and 600,000 pupils in two years and industry development of apprenticeship standards. Industry will provide further leadership on diversity and scope expanding the voluntary Skills Investment Fund supporting on-the-job training.

Industrial Strategy

<https://www.gov.uk/government/publications/industrial-strategy-building-a-britain-fit-for-the-future>

The strategy sets out a plan to build a Britain fit for the future – how to help businesses create better, higher-paying jobs with investment in the skills, industries and infrastructure of the future

It proposes how to boost productivity and earning power across the country by focusing on 5 foundations, ideas, people, infrastructure, business environment and places.

The Industrial Strategy included a commitment to develop a Sector Deal for the creative industries, recognising that this sector makes up over five per cent of the UK economy and employs more than two million people, and is one of the fastest growing, contributing £87bn of GVA.

Appendix 2

How the work was delivered

This paper is one of the outputs of work undertaken by Emma Wilcox Associates, supported by a small steering group, from January - July 2018.

Research to inform this paper included significant background reading and familiarisation of a wide range of policy and strategy documents (see Bibliography below), from District to national level.

Emma Wilcox undertook a large number of conversations both face to face and by phone as well as a series of presentations to key networks and partnerships concerned with economic development, strategic and spatial planning (Kent Cultural Transformation Board, Opportunity South Essex, TGKP Officers' Group, Ebbsfleet Cultural Visioning) and with individuals and organisations from across the creative and cultural industries.

In order to have a period of productive consultation and engagement, working with the steering group, these consultations were based around a series of draft propositions. These were developed in the early stage of the work using research and discussions, as well as drawing on the consultant's expertise and experience of the sector. They were intended to be rigorously tested and were open to change and challenge. They were designed to enable partners and stakeholders to bring their own plans and proposals to the discussions. We purposefully did not suggest specific projects or locations at this stage.

The propositions as set out below were accompanied by prompts to encourage discussion and to tease out more detail and information.

1 A creative enterprise zone, to retain and attract artists and new creative businesses to the area by offering permanent affordable workspace, business and skills support, business rates relief, super-fast broadband and a pro-creative economy planning regime. This proposition offers a way of re-purposing brownfield buildings and sites, addressing the plight of high streets and meets an acknowledged need for more good quality commercial space across the Estuary.

This proposition is informed by our knowledge of the creative industries as a highly fragmented sector. The creative economy is mainly comprised of micro businesses, with 9.6% of the business base accounting for just 3.3% of the jobs. The lack of visibility, impact and access to market, including access to more traditional industrial sectors, can hold back potential growth as a result.

We propose a super-networked series of production spaces across the estuary, which could be clustered around specialisms, localities or sub-sectors. We will consider a variety of scales; large scale facilities in the vein of High House Production Park to small and micro studios/workspaces, proposals include maker-spaces and art foundry facilities. As well as workspace, develop opportunities to connect with business support programmes. Enable access to finance via existing finance and loan schemes and attract new investors and capital.

Questions: Where are the potential sites and spaces? What clusters exist and can be built upon? What are the production needs of the creative

industries nationally/internationally that we could address? What plans and policies can we influence to support a pro-creative industry planning regime? What are the freedoms and flexibilities that we might seek from Treasury to enable this proposition? What finance options already exist and we can align with? What are the gaps in terms of finance?

How can this work help to maximise the benefit of new and proposed transport infrastructure improvements? Can the provision of good quality, interesting commercial spaces help with wider town centre regeneration and "place-making" work?

2 Creative innovation and research for growth, and cross-sectoral working

Capture and benefit from the innovation and research activity of the universities and consider the role of HEIs as key employers for the creative industry; freelancers, practitioners, researchers. Increase access to the specialist facilities and equipment within these institutions - encourage them to become more porous and accessible in order to drive forward interdisciplinary work.

Encourage and facilitate collaboration and co-location of a range of industries, using creativity and innovation to enable, influence and develop other sectors.

Enhance the creative and innovative power of SELEP universities to lead the development of creative content, possibly focusing on digital content. This proposition plays to our HEI's strengths and creates the opportunity to make sense of the various 'content making' production facilities we have in the region. In addition, maximising opportunities that

cross sectoral work can offer such as in advanced manufacturing, engineering and tech.

The role of HEIs and the wider skills and learning providers to ensure that the local talent pool is equipped to join industry and contribute to its growth. Seek to influence skills and training across all age ranges.

Questions: What are the plans and ambitions of our region's HEIs in relation to TEPC and the creative industries? Where are the similar clusters we can learn from? What can be developed from the work that went into the AHRC bid? What and where are the specialist facilities and equipment? What are the skills gaps? What existing skills base can we build on and repurpose for the creative industries? What short-term practical steps can happen quickly to prove the concept? Can HEIs help to foster better working across emerging and more traditional industrial sectors? What opportunities for co-location to drive innovation?

3 Culture within regeneration and place-making; the Kent/South Essex unique offer

In this period of ambitious housing growth, with Kent, Essex and London all having to meet extremely challenging local plan targets, we want to understand what role can culture and the creative industries play.

Consider how we can use the ambition for TEPC to drive up design standards and the overall quality of housing offer, in an area where quantity has often been the principal driver of activity. There is a significant opportunity to look at the new housing

offer and to challenge whether it is the right offer to drive growth of the creative industries.

There is an opportunity for this work to help maximise additional local employment and not place an additional burden on already pressurised transport infrastructure. We know that the Essex and Kent estuary has much to offer in terms through, its landscape and heritage and need to communicate this in a more coherent and confident manner.

We propose that this work might address the impact of culture and creative activity on social cohesion, building places people choose to live and consider social return on investment, related to the costs to government of health and unemployment.

Questions: What are the levers/routes to make an impact? How to influence spatial planning? What are the infrastructure needs? Is there an opportunity to make a creative economy contribution into potential "housing deals" being considered across the Estuary?

Consultation:

The outline propositions were set out and circulated widely through individuals and networks and directly to identified targets including:

- Thames Gateway Kent Partnership
- Opportunity South Essex
- SECEN
- Kent Cultural Transformation Board
- Arts Council England
- Historic England
- Local Authority; Leaders, Chief Executives and Portfolio Holders at Unitaries and

Districts. Directors of Regeneration, Economy, Planning and Culture across all levels of local gov.

- Key Cultural Organisations in Kent/ Greater Essex - all NPOs
- Sector Bodies – beyond Kent and Greater Essex, such as ISAN, ACAVA, Creative Industries Federation, Screen South
- Inward Investment organisations
- Sector Leaders within Kent and Greater Essex
- HE and FE – Kent, Greater Essex and London
- Ebbsfleet Development Corporation
- Private Sector

From these initial contacts Emma Wilcox set up a large number of 1-1 meetings. The approach was a mix of advocacy, encouragement, research, testing and sifting of propositions, structures, opportunities and potential, as well as extensive site visits across the full Kent and Greater Essex Thames Estuary geography and to exemplar and developing projects in other regions.

During this period partners were encouraged to come forward with proposals and sites which were tested against emerging criteria, to start to develop a rationale for which work to take forward. This will necessarily require further flexibility as the TEPC project develops overall and the project pipeline will continue to be refreshed with new projects coming forward over time.

The work has been delivered in parallel with the first part of Regeneris' commission and has needed to accommodate and respond to their requirements for information, strategic direction and local intelligence

LIST OF PROJECTS CONSIDERED DURING CONSULTATION - note variable levels of detail according to what came forward

Project/Location/Partner	Place	Local Authority	Description
Basildon Centre / South Essex College	Basildon	Basildon	South Essex college new town centre site - creative media and digital focus, plus partnership with PROCAT (college of advanced technology)
Industrial Estates A127 corridor	Ilford & Burnt Mills	Basildon	We Made That unearthed a cluster of Creative Production businesses on these sites. Also note underwater film studio facilities.
Basildon Town Centre	Basildon	Basildon	Shopping Centre developer - exploring ideas for digital workspace and new uses/activities to drive footfall
Innovation Warehouse	Watt Tyler/town centre	Basildon	Digital and creative media co-working space and makerspace – feasibility study undertaken, business plan is in development.
Marlow - The Kit	Canterbury	Canterbury	Production space aligned to Marlowe Theatre
City of Culture	Canterbury	Canterbury	Early stages of considering a bid
University of Kent northern land	Canterbury	Canterbury	No defined plan yet - Canterbury CC advised series of workspace hubs are proposed. Also note Farrell masterplan for the campus
Canterbury CC	Estuary-wide	Canterbury	Chief exec interested in further 'property vehicle' conversations.
Herne Bay	Herne Bay	Canterbury	Growing CCI cluster- Coastal Communities bid
Mountfield Park Canterbury	Canterbury	Canterbury	SE of city - large planned development, to include three quarters of a million sq. feet of employment space. Corinthian Land www.mountfieldpark.co.uk
UCA various locations	Estuary wide- Kent	Canterbury and Medway	UCA acquired the Open College of Art - keen to explore a flexible learning model. Distance learning, but with access to facilities
Old Fire Station Hadleigh	Hadleigh	Castle Point	ACAVA have studios, Essex CC have library and Castle Point own land. Town Centre position
Colchester Amphora	Colchester	Colchester	Economic development - focus on digital and creative media, innovation.
University of Essex	University campus	Colchester	University of Essex - Knowledge Gateway major new Innovation Centre, providing space and hands-on start-up support for 50 businesses and organisations.
Mercury Theatre	Colchester	Colchester	Production facilities for mid-scale touring theatre – much in demand. Also, Garrison building for production, rehearsal and creation of shows.

Dartford Northern Gateway	Riverside Industrial Estate	Dartford	Northern Gateway development sites - mixed ownership. Next iteration of Local Plan, opportunity to influence, will need workspace as part
North Kent College - Miskin Centre	Dartford	Dartford	Next stage capital plans - keen to be responsive to sector skills needs. Willing partners, prev. worked with Bexley on Borough of Culture bid, so good links
Orchard Theatre and shopping centre	Dartford	Dartford	No firm plans; part of the council's ambition to remodel the town centre and create new reasons to visit - Place-branding exercise underway. Could offer some meanwhile space.
Acacia House, ex-Glaxo buildings town centre	Dartford	Dartford	No firm plans but potential site to explore further
Northern Essex Garden Communities	Colchester and Braintree	Essex CC	Northern Essex Garden Communities – planned large-scale housing developments – potential for economic development focus to include CCI – particularly Colchester with links to University site
Bee Hive centre	Northfleet	Gravesham	Potential to trial co-working space/ makerspace in Gravesham
Ebbsfleet Centre	Ebbsfleet	Gravesham	Health and innovation campus. Marc Jaffrey cultural visioning work underway. Strong indication that EDC would welcome TEPC related conversations
Canal Basin- Milton industrial area	Gravesend	Gravesham	Series of low value but fully let industrial spaces - builders' yards, mechanics, scaffolders etc. Long term development site - could influence. Includes residential barge marina. Ambition by local partners including Cohesion Plus and LV21 to develop production facilities for outdoor arts/mela/carnival
Henley Building / Northfleet Embankment area	Northfleet	Gravesham	Part of the EDC red line, some land allocation for employment. Ebbsfleet actively working with partners, LV21, Council, Whitstable Biennale
Customs House	Gravesend	Gravesham	Used to be HMRC offices, now owned by Mapely - some early discussions about developing creative workspace - Farnham Maltings model, with some community facing activity. LV21 are engaged in conversation including with GBC
Port of London Authority	Gravesend	Gravesham	Vision for The Thames - based in Gravesend. Land and workforce interest. Note Port of London Authority cited in TEC report as key partner and River as one of the 5 key areas
Old Town Hall	Gravesend	Gravesham	Central location -potential to trial small digital co-working space and start to unearth homebased SMEs
Peugeot Building	Maidstone	Maidstone	Disused car showroom in centre of Maidstone
Baltic Wharf/Power Hub	Maidstone	Maidstone	large ex industrial building (Powergen) has been home to CCIs before. On river and town centre location

University of Kent	Chatham	Medway	University of Kent – Institute for Creative and Cultural Industries. Note focus on digital cultural content. NB Dovetail Games, KMTV, Creative digital content. S
UCA	Rochester	Medway	Urgent focus on supporting graduates into freelance/microbusiness - practical support. 3+3 model. Need workspace, and cultural infrastructure. Incubate & move out into grow-on space locally.
Hoo peninsula	Hoo	Medway	Medway developing new Local Plan - ambitious ideas for Hoo. Creative industries firmly in mind as a driver for economy
City of Culture bid	Chatham	Medway	Medway Cultural Partnership - early stage ideas around a bid for 2025 – catalyst for further development on and around Dockyard site and more broadly
Chatham Intra	Chatham	Medway	Area of land/buildings close to river currently ad hoc studios, privately owned - could be part of a cluster to include Sun Pier House. Potential Quinn Estates development. Coastal Communities bid
Trafalgar Centre	Chatham	Medway	Closed down shopping centre with car park on high street close to Nucleus arts - ideas relating to music production facilities
Brook Theatre	Chatham	Medway	Looking to move to Trust - site development might include theatre production facilities
Chatham Waters	Gillingham	Medway	Long term plans. Peel Ports have excellent track record (Salford) in supporting CCI. Not yet part of their vision for Medway. Planned theatre/performance space “EventCity”
The Place – London Contemporary Dance School	Chatham Historic Dockyard	Medway	Possible move to Dockyard for some of The Place / London Contemporary Dance School courses and contemporary dance production. Allow for growth of student numbers and more training for dance production needs
Better Queensway	Southend	Southend	Large scale housing development and remodelling of town centre – look at opportunity to influence housing provision and workspace to suit the needs of growing CCI and attract inward investment
Southend High Street	Southend	Southend	Potential to repurpose empty shops and offices for creative workspace.
Forum 2	Southend	Southend	Focal point, Uni of Essex, South Essex college and council. Creative industries hub
Metal	Southend	Southend	Concept for Southend as a 'campus' for creative industries across multiple sites, well connected to each other and beyond the town. Build on Southend's DIY ethic, music and literature. Estuary Festival.
Beecroft – New Artist Studios	Southend	Southend	Conversion of Beecroft Gallery into studios – underway, key part of work to address demand for workspace. Would be important element of networked workspaces

Old Waterworks	Southend	Southend	Workspace – currently closed for refurbishment. Due to re-open Autumn 2018.
Southend Airport – Business Park	Southend	Rochford	Enterprise Zone – potential to test what this might mean for CCI
Bell Centre	Sittingbourne	Swale	Town centre gap site, poor condition, Developers say not viable, Potential to explore mixed use and live/work
Ideas Test	Sittingbourne	Swale	Ambition to look towards permanent building and larger scale, with work /creation space. Possibly with Future Foundry. Model to include revenue generation from studios
Historic Dockyard	Sheerness	Swale	Heritage assets in the port - Heritage England keen to invest. Issues re scale of cost to bring into use.
Kent Science Park	Sittingbourne	Swale	Ongoing redevelopment of site - potential for co-location to enable collaboration of high-tech/advanced manufacture with CI
Sheerness Dockyard Church	Sheerness	Swale	HLF funding in secured to start work in ambitious plan to rebuild and re-use the Dockyard Church, including working with YP and skills agenda and looking at workspace
Pettman Building	Cliftonville	Thanet	RESORT studios currently occupy part - property has been sold to another party. Some early conversations with new owner.
Open School East	Cliftonville	Thanet	Need more space in order to grow and raise revenue from studio rental. Want to purchase building, make themselves sustainable, future-proof
Makerspace	Margate	Thanet	Early conversations between Kate Kneale/Dan Thompson & Dreamland about Arlington site. Dreamland operators have option on Arlington
Sands Heritage	Margate	Thanet	Parent company for Dreamland (Aiden De Brunner) ambitions to develop large scale STEM facility in Margate – has identified land, in discussion with KCC. Co-location of creative businesses a possibility. – keen to continue conversations
Union Crescent	Margate	Thanet	Jonathan Viner building, series of CCI tenants plus Tracey Emin studio and Carl Freedman
53-57 Margate High Street	Margate	Thanet	Ownership may come back to TDC. Some appetite for support but not clear on detail
Turner Contemporary	Margate	Thanet	Capital plans. Turner Prize 2019. Focus on creative learning, good hook into skills pipeline, workforce development. Major anchor institution whose track record gives springboard for future plans, significant attractor to the incoming workforce, relocating from London

Thameside Centre	Grays	Thurrock	Currently theatre and library - potential to rethink uses, including workspace. Become centre for production and delivery. Note town centre location and plans to remodel Grays High street
High House Production Park	Purfleet	Thurrock	Three further plots to develop. Priority for Thurrock Council
Estuary Festival	Tilbury/Gravesend /Southend/ Ebbsf.	Thurrock	Further develop activity, identify and support the associated production needs to support Estuary Festival in 2020
Institute of Technology at HHPP	Purfleet	Thurrock	Institute of Technology (CCSkills/Sara Whybrew) bringing together FE, HE, Industry and Apprentices - tech qualification reforms
Quartermaster Studio	Purfleet	Thurrock	Key element of Purfleet town centre regeneration, potential for HE provision with LSBU
Coalhouse fort	East Tilbury	Thurrock	Long term potential site. No action at present. Metal flagged this up.
Bata Factory	East Tilbury	Thurrock	Derelict building, some adjoining buildings (office and business units) have been refurbished and developed as generic workspace offer Thames Enterprise Centre. Iconic architecture which would suit and be attractive to CCI sector
Tilbury Cruise Terminal and rail station	Tilbury	Thurrock	Tilbury on the Thames trust have well developed plans to restore the buildings as a working Cruise Terminal and creative space for the community. Feasibility for artist studios has been undertaken – not immediate focus. Relationship with Kinetica. Phase one: ex-railway station building for workspace and training. Metal keen to explore as are local partners.

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