

# THAMES ESTUARY PRODUCTION CORRIDOR

## THE CASE FOR INVESTMENT

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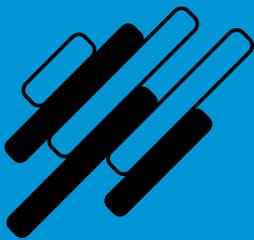
## THE CASE FOR INVESTMENT

This report sets out a clear case for investment in the Thames Estuary Production Corridor and provides the strategy to unlock and maximise the creative potential of the vision.

It marks the culmination of a year-long programme of activity in 2018-2019 which included consultation with over 200 partners and stakeholders and granular research into baseline conditions across the Estuary.

Many thanks to the Thames Estuary partners who gave time to contribute to this report.

# MAYOR OF LONDON



**SOUTH EAST  
LOCAL ENTERPRISE  
PARTNERSHIP**

In partnership with:



**Lewisham**



Researched and written by Hatch Regeneris, We Made That and Tom Fleming Creative Consultancy. Design by Maddison Graphic.

Commissioned by the Greater London Authority and the South East Local Enterprise Partnership, in partnership with the Royal Docks team and the London Boroughs of Bexley and Lewisham.

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Royal Opera House,  
Bob and Tamar Manoukian Production  
Workshop at High House Production Park, Thurrock  
Nicholas Hare Architects  
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# OPPORTUNITY

£111+bn

**Value** of UK's creative industries in 2018 per annum, growing at five times the rate of the economy as a whole



£127bn

Estimated **supply chain spend** per annum by the creative industries across the UK



+20%

Average **productivity** per creative SME compared to the economy average

100,000

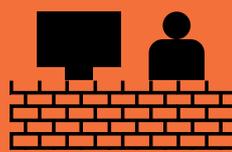
Residents across the Estuary already working in creative **occupations**



# FOUNDATIONS

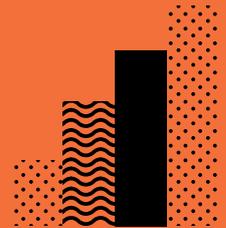
16,000

Creative and cultural **production businesses** supporting over 46,000 jobs across the Estuary



+37%

Increase in the number of **production businesses** across the Estuary over the past five years



£200m

**Investment** in large scale production facilities across the Estuary over the past decade



63

**Higher and Further Education Institutions** across the Estuary. Many of these specialise in creative industries



# FUTURE POTENTIAL

+50,000

**Projected number of jobs** delivered by the Thames Estuary Production Corridor - creating the UK's largest concentration of production activity



+£3.7bn

Projected additional **GVA** per annum which could be delivered by the Thames Estuary Production Corridor - enhancing UK productivity and local prosperity



# THE REPORT AT A GLANCE

**A Case for Investment to Build Back Better** This report provides the strategy to unlock and maximise the creative potential of the Thames Estuary Production Corridor.

It marks the culmination of a year-long programme of activity in 2018-2019 which included consultation with over 200 partners and stakeholders and granular research into baseline conditions across the Estuary.

It is published in July 2020 as the new Thames Estuary Growth Board launches its action plan, *The Green Blue*, and announces its support to the Thames Estuary Production Corridor.

This research was undertaken before the COVID-19 pandemic hit the UK and the world, and recognises projected impacts on the South East. Despite the devastating impacts of the pandemic, the cultural and creative industries will be integral to accelerating the UK's economic and social recovery. Prior to COVID-19, the UK's creative economy grew five times faster than the economy as a whole, with jobs being created three times as fast. The Thames Estuary Production Corridor will help create thousands of jobs in a time of need, building world-class cultural infrastructure and developing local skills opportunities that will be crucial to deliver sustainable and equitable growth. Importantly, it will help to create and sustain places where people want to live, work and play.

Now more than ever it is critical that the full vision and potential of the Thames Estuary Production Corridor is realised, through the commitment, support and cross-boundary collaboration of the Thames Estuary Production Corridor Partners, the new Thames Estuary Envoy and Growth Board.

**What is the Thames Estuary Production Corridor?** The Thames Estuary Production Corridor is a significant new vision to unite East London, the North Kent Coast and South Essex to create a world-class centre for creative and cultural production: leading global innovation, developing talent and cultivating world changing ideas.

It is a globally significant programme, the first of a new generation of collaborative and transformational projects in the Thames Estuary, presenting a shared economic and social identity across 18 local authority areas.

**Foundations and Momentum** With more than 16,000 businesses supporting over 46,000 jobs supported and significant headroom for growth, the creative and cultural production industry has grown rapidly in recent years, and over £200m investment has been delivered in large-scale production facilities. At the same time, networks and connections have been growing from the bottom up with local and sub-regional investment working to strengthen the creative and cultural ecosystem across the Estuary.

**The opportunity for growth** The Thames Estuary Production Corridor has the potential to double the size of the production sector across the Estuary, supporting the delivery of more than 50,000 new jobs and creating additional economic output (GVA) of over £3.7bn per annum. Employment creation at this level will firmly embed the Estuary as the UK's largest concentration of creative and cultural production activity. In doing so it will help deliver the UK's Industrial Strategy.

**From Vision to Action** The delivery approach for the Thames Estuary Production Corridor will build on the significant momentum which has been achieved over the past two years.

Initial investment of over £4.6m from the Department for Digital, Culture, Media and Sport and the Ministry of Housing, Communities and Local Government demonstrates confidence in the opportunity to deliver much needed capacity and specialism to the UK's creative economy.

**What's Next?** This report sets out a clear case for investment in the Thames Estuary Production Corridor, and the strategy for delivery. It is now time for local, regional and national partners (both public and private) to unlock and maximise the potential of the Thames Estuary Production Corridor.

The Thames Estuary Production Corridor Partners Board will lead the vision and action plan delivery, working with the Thames Estuary Envoy and Growth Board.



In 2018 the creative  
and cultural  
industries were worth  
over £111 billion  
nationally, employing  
over 2 million people

# 1. INTRODUCTION

The vision for the Thames Estuary Production Corridor as a world-class cluster of production, innovation and talent was launched by the Mayor of London, Sadiq Khan, in partnership with the London Economic Action Partnership (LEAP), the South East Local Enterprise Partnership (SELEP) and the South East Creative Economy Network (SECEN) in February 2017.

It recognised the considerable momentum achieved by the creative and cultural industries across the Estuary over the past decade, and the opportunity which could be unlocked via further proactive collaboration, action and investment.

This report provides the case for investment in the Thames Estuary Production Corridor, setting how partners across the area can work together to move from vision to action.

It is published in July 2020 after COVID-19 hit and as the new Thames Estuary Growth Board launches its action plan announcing its support to the Thames Estuary Production Corridor.

Now more than ever it is critical that the full vision and potential of the Thames Estuary Production Corridor is realised, through the commitment, support and cross-boundary collaboration of the Thames Estuary Production Corridor Partners, the new Thames Estuary Envoy and Growth Board.

## Introducing the Thames Estuary

The Thames Estuary is London's gateway to the world. On its banks and inland lie ancient settlements, fishing harbours, resort towns, industrial hubs, active and decommissioned docks and some of the newest and fastest growing places in the country.

It is a region of opportunity. Much of the area is undergoing rapid change with unprecedented levels of investment to deliver regeneration, enhance connections and develop economic infrastructure. The Thames Estuary 2050 Growth Commission was set up in recognition of this potential and the need to work proactively and strategically to maximise the opportunity. It highlighted the Thames Estuary Production Corridor as a key objective in its June 2018 report to Government.

The Thames Estuary Production Corridor is now established as a priority project that will be supported by the Thames Estuary Growth Board and Estuary Envoy, as outlined in their new action plan.

In London, the Thames Estuary includes some of the most diverse populations and opportunities for cultural consumption anywhere in the world. It also includes rapidly growing locations which will accommodate the city's growth: areas such as the Royal Docks, Thamesmead, Bexley Riverside,

Woolwich, Deptford, New Cross and Dagenham Dock.

After four decades of restructuring, East London's economy has become a globally significant hub for Information and Communications Technology, Media, Digital Industries and Fashion; opening new markets and opportunities for the city and the UK.

Further east, the North Kent Coast and South Essex are increasingly coming to the fore of the region's creative conversation. From Margate to Ebbsfleet and Southend to Thurrock, towns across the Estuary have been redefining themselves around creativity and culture, capitalising on space, championing talent and investing in new facilities and infrastructure.

While acting as important creative and cultural hubs in their own right, the North Kent Coast and South Essex also complement London. They provide much needed cultural production space and capacity and play a significant role in the functioning and vitality of the workforce and labour market.

# What is Creative and Cultural Production?

The creative and cultural industries are at the heart of the UK economy and were contributing in excess of £111bn per annum in total output before COVID-19 hit.

They are one of the fastest-growing components of the UK economy (growing at five times the rate of the economy as a whole in 2018) and have a formidable track record in export, attracting investment and creating a progressive identity for the UK, London and the South East. They generate growth, catalyse innovation and enhance the quality and distinctiveness of places. They are embedded at the heart of the UK's Industrial Strategy, reflecting both their role in supporting local economic vitality and resilience and in promoting national competitiveness.

## **Production, Consumption and Supply Chain Activities**

While often referred to as a sector in itself, the creative and cultural industries cover a diverse set of activities and have relevance across the economy. Most sectors, businesses and activities now engage in creative activity to some degree.

They involve a cycle of production, consumption and distribution activities and use intellectual and creative capital as their primary input.

The Thames Estuary Production Corridor primarily focuses on creative and cultural production: those activities relating to the making of work. **Creative and cultural production** spans multiple industries and activities across the economy. Examples include: rehearsing a performing arts piece, designing a clothing line, building a theatre set, recording and distributing an album, doing post-production for a film, programming and designing a video game, publishing a magazine or creating an advertising campaign.

Creative and cultural production does not, however exist in isolation. To a large extent, the scale and nature of production activities are driven by **creative and cultural consumption**: the purchase or consumption of creative and cultural activities by buyers, consumers or audiences. Examples include:

going to museums, watching films and listening to the radio.

The sector is also supported by a diverse and complex set of **supply chains**. These provide materials, services and skills to production and consumption activities. Examples include: manufacturing of wood products, manufacturing of fabricated metal products, specialised construction activities, wholesale of textiles, and logistics and distribution.

## **Thames Estuary Production Corridor Focus**

While the Thames Estuary Production Corridor focuses on supporting the growth and success of production activity, it recognises the need for an economy wide approach. The vitality and focus of the sector is defined by evolving consumer demand, expectations and technology, while generating and supporting a broad range of economic dependencies itself.

It acknowledges that production activities take place at a range of scales: from freelance creative practitioners to the activities of internationally significant production facilities or companies.

While some businesses specialise solely in creative and cultural production activities, for others, it may just be a small component of wider activities or processes.

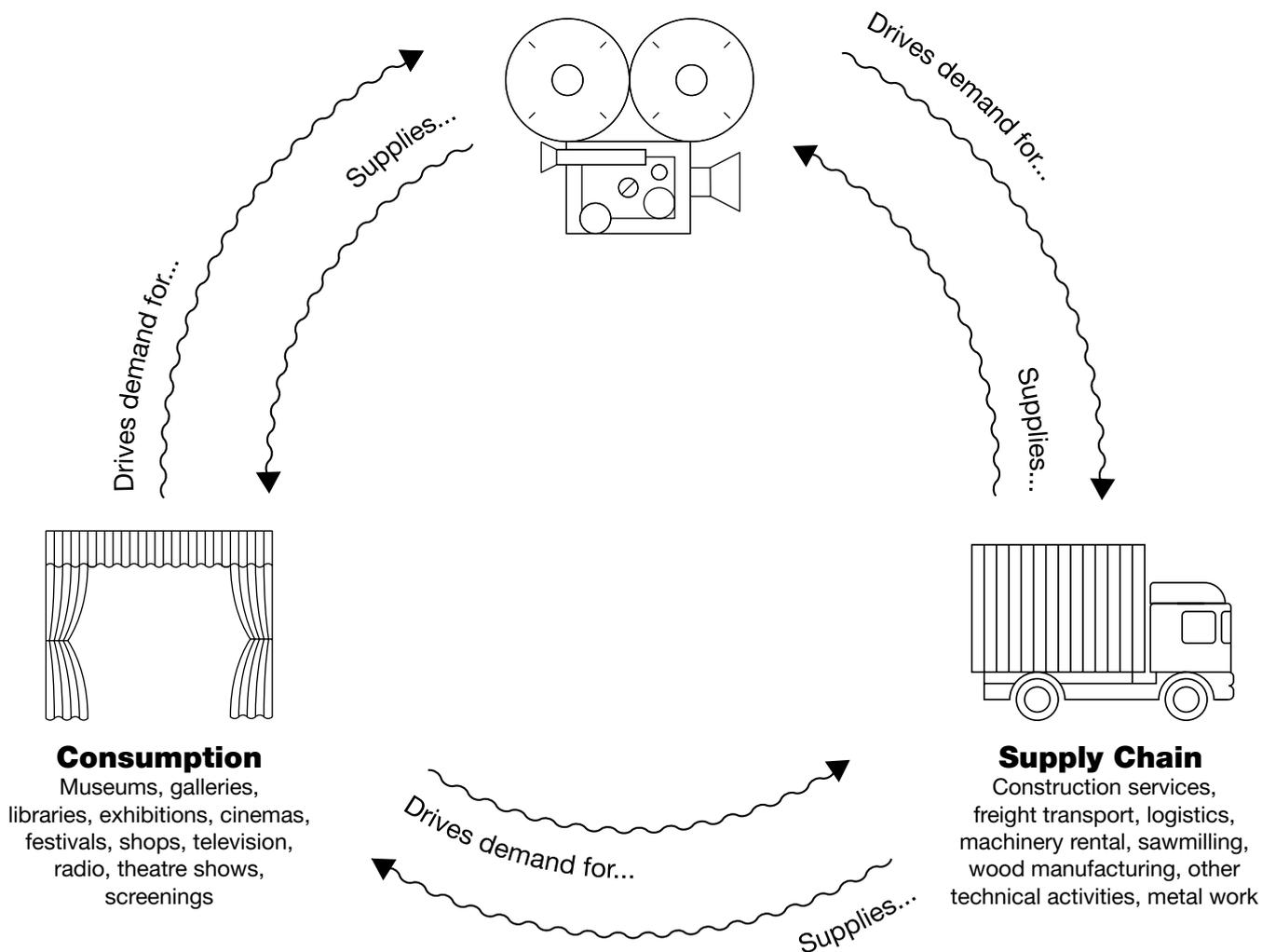
Finally, the Thames Estuary Production Corridor also recognises that there will be many businesses not currently engaging in creative or production activities, but which will need to in the future as markets and technologies evolve.

As such, the Thames Estuary Production Corridor aims to strengthen the Estuary's creative and cultural ecosystem as a whole, embedding it more deeply across the economy to enhance critical mass, build identity, enhance investor attractiveness, and underpin long-term competitiveness.

# The Creative and Cultural Economy

## Production

Architecture, film production, fashion design, crafts, ceramics, television production, software engineering, publishing, musical production, photography musical instrument manufacture, theatre set production



Research by the GLA<sup>1</sup>, as part of the Mayor of London's Cultural Infrastructure Plan, has found that London's creative industries boost the capital's economy by spending £40bn per year within their supply chain - supporting a wide range of other sectors, and that every job in London's creative industries supports an additional 0.75 of a job in the wider economy. It also finds that in the UK, for all creative industries, the estimated total supply chain spend is £127bn. For example, the National Theatre in London is serviced by over 200 individual businesses across the country. This network includes set designers and builders, costume makers, security services providers, drinks wholesalers, lighting technicians and many more. Around 13% of their annual spend goes to creative production activities – this is broken down by activities related to artistic creation (6%), performing arts (7%) and supporting services to performing arts (4%). Around 37% of spend is currently retained in London, with the rest leaving the region. Over the course of a year, the National Theatre employs around 1,900 freelance workers on top of its regular employment base of 1,178 jobs. These included artistic staff, like actors, workshop facilitators and writers.

1 [Creative Supply Chains Study](#), 2019, We Made That and Hatch Regeneris (GLA)



# Report Purpose and Approach

**This report provides a strategy to unlock and maximise the potential of the Thames Estuary Production Corridor.** It marks the culmination of a year-long programme of research and engagement in 2018-2019 by Hatch Regeneris, We Made That and Tom Fleming Creative Consultancy. It was commissioned and overseen by the Thames Estuary Production Corridor Partners Board, a unique cross-Estuary group representing the cultural and creative sectors and policy-makers from Kent, Essex and London. Research has included:

- Evidence collection: a detailed process of evidence collection, examining the current position and trajectory of the Creative and Cultural Production sector in the Thames Estuary and across the UK; analysis of creative and cultural assets, facilities and clusters across the Estuary; review of supporting economic, education and research infrastructure; and review of national and international case studies to provide learning and best practice. Findings from the evidence base are included throughout this report.
- Consultation: an extensive programme of consultation covering both partners within and external to the Estuary. Over 200 partners have engaged in discussions regarding the Thames Estuary Production Corridor, including local workspace providers, creative and cultural bodies and organisations, developers, higher and further education institutions, sector representatives, and public sector representatives from local authorities up to central government. Engagement is ongoing, with this report intended as a starting point for further dialogue, partnership working and collective action.

The report, and research within, should be seen as capturing a moment in time: recognising that the case for investment, scale of ambition and delivery commitment will continue to evolve as the concept of the Thames Estuary Production Corridor becomes embedded and gathers momentum.



The Estuary's  
creative and cultural  
production sector  
has grown by over  
a third over the past  
5 years and now  
comprises over  
16,000 businesses

## 2. VISION

### **Thames Estuary Production Corridor Vision**

The 2017 vision for the Thames Estuary Production Corridor is bold. It establishes an aspiration to generate a new economic and social narrative for the Thames Estuary as:

**“...a world-class centre for production – leading global innovation, developing talent and cultivating world changing ideas”**

Sadiq Khan, the Mayor of London has stated his ambition is to create **“the world’s largest creative production corridor; creating a landmark corridor along the Estuary, powering skills opportunities and new jobs”**

This ambition is built upon local foundations which South East LEP Chair Christian Brodie describes as **“a unique, self-sustaining, infrastructure to support creative businesses in a way that has not been seen before”**

## A Shared Economic and Social Strategy for the Thames Estuary

The Thames Estuary Production Corridor is a major project that marks a new, stronger commitment to collaboration between partners in Kent, Essex and London. It is founded on an opportunity to develop and celebrate a shared economic and cultural strategy. It can be the bellwether for the evolution of the region and will work closely with the new Thames Estuary Growth Board and Envoy to maximise growth opportunities.

The story of cultural and creative production in the Thames Estuary is one of significant growth and a rapidly improving infrastructure offer. However, there remains significant headroom for growth: with increasing levels of demand for production space and services, evidence of latent capacity within the local labour market, and the supply of space and infrastructure investment needed to catalyse growth. The Thames Estuary Production Corridor will deliver tangible economic and social uplift: from making a fundamental contribution to the national Industrial Strategy, to enhancing the life chances, participation and prosperity of the Estuary’s increasingly diverse communities.

The shared ambition for the Thames Estuary Production Corridor is to continue to build the identity of the region as a creative place. It aims to nurture a global production cluster of unsurpassed scale, diversity and quality by embracing the types of infrastructure, technology, skills and placemaking attributes required to make a lasting difference to the performance and quality of the UK creative economy.

It will transform the scale, diversity and visibility of creative and cultural infrastructure and activities across the Estuary’s high streets, towns, and industrial areas; securing investment in new production facilities and workspaces, and supporting the development and evolution of stronger creative networks, clusters and places.

And it will champion and develop the next wave of creative and cultural talent, pioneering new approaches to leadership, innovation, skills development and increasing levels of engagement and inclusion.

## **Economic Potential of the Thames Estuary Production Corridor**

The economic potential of the Thames Estuary is significant.

The Thames Estuary 2050 Growth Commission reported that, by 2050, there is potential for 1.3 million new jobs, driving £190 billion additional GVA and accommodating at least 1 million new homes in the Estuary.

The Thames Estuary Production Corridor has a crucial role to play in helping to unlock this potential: both via its direct investments and interventions and through its catalytic impacts on identity, wellbeing, profile and confidence.

With the support of the Thames Estuary Growth Board, it will help deliver the UK's Industrial Strategy: enhancing national production capacity and helping to reinforce and protect the UK's position as a global leader in the creative and cultural industries, innovation and technology.

It will boost the overall economic competitiveness and resilience of the Estuary, supporting the sustainable growth aspirations of the Mayor of London, the South East LEP, and authorities across the area.

Growth benefits will be realised across the Estuary's places and communities, creating more productive, diverse and inclusive opportunities.

**The Thames Estuary Production Corridor has the potential to double the size of the Estuary's creative and cultural production sector creating the largest concentration of production activity in the UK with 50,000 additional jobs, and over £3.7 billion additional GVA per annum.**

# Development of Places, Clusters and Infrastructure

Central to the success of the Thames Estuary Production Corridor will be the continuing development and evolution of the region's diverse network of places.

The Thames Estuary Production Corridor's vision to establish a "world-class centre for production", comprises a broad set of sectors, activities and ideas. Supporting local distinctiveness and specialisation, and the development of stronger networks across the areas' assets and communities will be crucial to develop critical mass and identity – both locally and collectively.

Delivery will be diverse in terms of geographic focus and reach, thematic focus, and delivery approach. Estuary-wide initiatives will be supported, along with smaller scale projects rooted in local communities.

## **Creative and Cultural Production Momentum Across the Estuary**

The Estuary is already home to a significant network of creative and cultural production hubs and assets.

These range from large scale and highly bespoke facilities serving a specific sector or activity (such as High House Production Park in Thurrock, English National Ballet in London City Island, 3 Mills film studios in Stratford and Maidstone Studios), to mixed-activity facilities and campuses (such as Here East in Stratford, Chatham Historic Dockyard, the Underwater Studio in Basildon and the Bow Arts RAW Labs in Royal Docks), and smaller scale creative workspaces (such as Metal in Southend, Cockpit Arts in Deptford, Resort Studios in Margate, the Silver Building (meanwhile) in the Royal Docks, Nucleus Arts Centre in Chatham and the Lakeside Centre by Bow Arts in Thamesmead).

Alongside these hubs and assets, the Estuary benefits from a dense network of higher and further education institutions: there are over 63 institutions with a full or partial creative and cultural focus across the region. Many of these have leading specialisms in the creative and cultural industries: from Goldsmiths in Lewisham, to the University for the Creative Arts in Kent, the National College

of Creative Industries in Purfleet, Trinity Laban Conservatoire of Music and Dance, the East London College of Music and E15 Acting School in Southend. The University of Kent has also launched a new Institute of Creative and Cultural Industries.

Over the past decade, sector capacity in the Estuary has been boosted by over £200 million worth of investment in specialist production facilities.

Crucially, further investment is on the way. Across the Estuary there are a large number of projects either in delivery or being planned which will further enhance the region's creative, cultural and production capacity. These are diverse in terms of their focus and ambition, but can broadly be categorised as:

- **Growth Engines:** Larger scale initiatives which have the potential to be transformational in supporting the development of the sector
- **Local Sparks:** Smaller scale projects supporting the development of creative, cultural and production activities in the Estuary's places

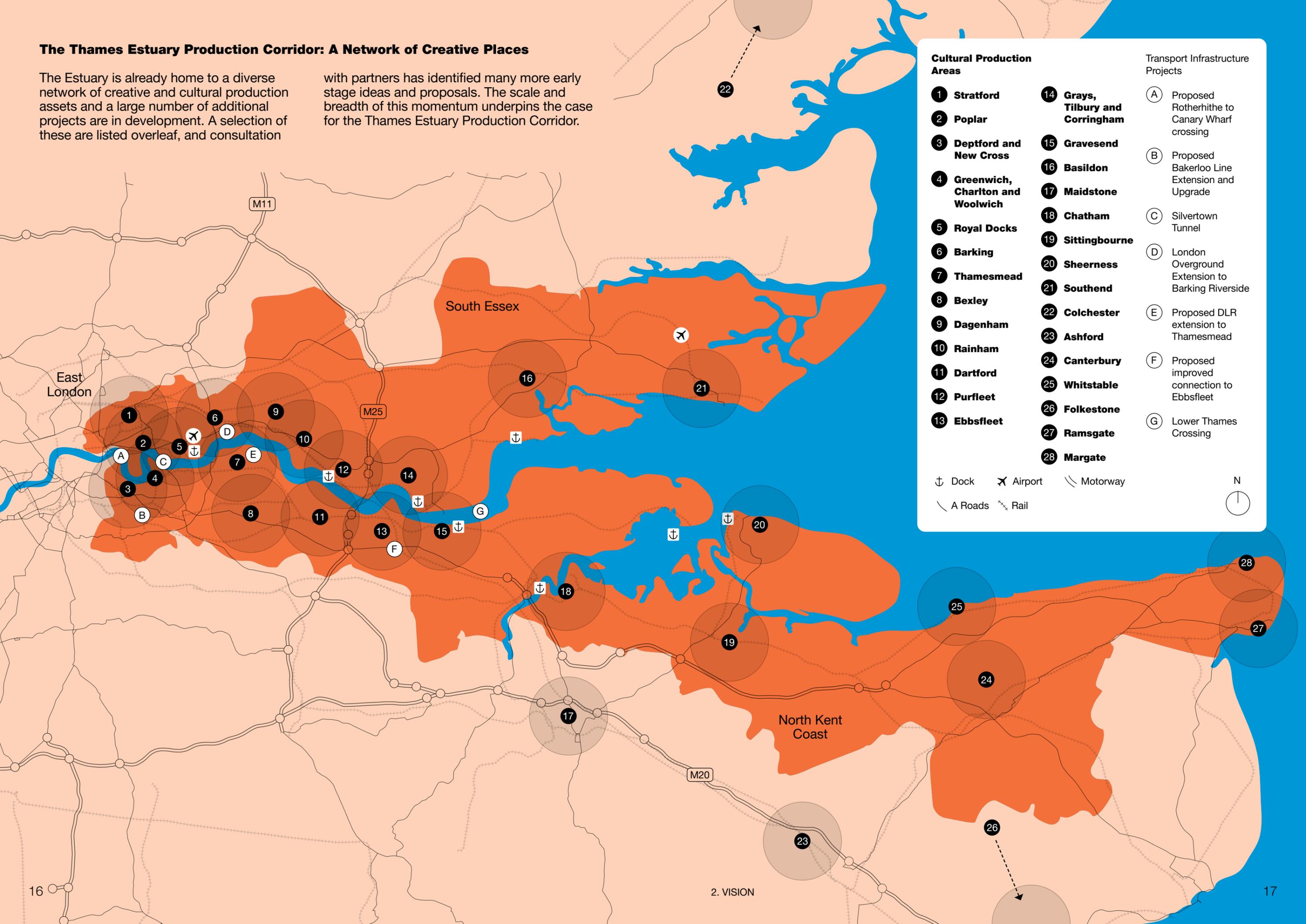
While some of these projects are already in delivery, others remain aspirational and require development and investment.

The Thames Estuary Production Corridor aims to unite this considerable momentum under a common identity and purpose, helping to support project development, making the case for new investment and building partnerships and collaboration.

## The Thames Estuary Production Corridor: A Network of Creative Places

The Estuary is already home to a diverse network of creative and cultural production assets and a large number of additional projects are in development. A selection of these are listed overleaf, and consultation

with partners has identified many more early stage ideas and proposals. The scale and breadth of this momentum underpins the case for the Thames Estuary Production Corridor.



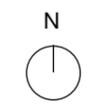
### Cultural Production Areas

- 1 Stratford
- 2 Poplar
- 3 Deptford and New Cross
- 4 Greenwich, Charlton and Woolwich
- 5 Royal Docks
- 6 Barking
- 7 Thamesmead
- 8 Bexley
- 9 Dagenham
- 10 Rainham
- 11 Dartford
- 12 Purfleet
- 13 Ebbsfleet
- 14 Grays, Tilbury and Corringham
- 15 Gravesend
- 16 Basildon
- 17 Maidstone
- 18 Chatham
- 19 Sittingbourne
- 20 Sheerness
- 21 Southend
- 22 Colchester
- 23 Ashford
- 24 Canterbury
- 25 Whitstable
- 26 Folkestone
- 27 Ramsgate
- 28 Margate

### Transport Infrastructure Projects

- (A) Proposed Rotherhithe to Canary Wharf crossing
- (B) Proposed Bakerloo Line Extension and Upgrade
- (C) Silvertown Tunnel
- (D) London Overground Extension to Barking Riverside
- (E) Proposed DLR extension to Thamesmead
- (F) Proposed improved connection to Ebbsfleet
- (G) Lower Thames Crossing

- ⚓ Dock
- ✈ Airport
- 🛣 Motorway
- 🛣 A Roads
- 🚊 Rail



## Cultural Production Areas: Local Assets and Projects

**1 Stratford.** Delivery of East Bank alongside Here East creates a globally significant hub for creative production and consumption.

- ↳ **Here East** Queen Elizabeth Olympic Park
- ↳ **3 Mills Studios** Bromley-by-Bow
- ↳ **Loughborough University** Queen Elizabeth Olympic Park
- ↳ **UCL East at East Bank** Queen Elizabeth Olympic Park
- ↳ **UAL's London College of Fashion at East Bank** Queen Elizabeth Olympic Park
- G **East Bank** Queen Elizabeth Olympic Park
- G **National Talent House for Urban Culture** Stratford

**2 Poplar.** Economic identity becomes synonymous with the creative industries, and clothing design, production and manufacturing through the Fashion District.

- ↳ **Trinity Buoy Wharf** Leamouth
- ↳ **English National Ballet** London City Island
- ↳ **The Space** Isle of Dogs
- ↳ **Poplar Works** Fashion District, Poplar
- ↳ **Half Moon Theatre** Limehouse
- ↳ **The Trampery Fish Island Village** Hackney Wick
- ↳ **Queen Mary University of London** Mile End Campus
- ↳ **London Film School** City Island
- G **Hackney Wick and Fish Island Creative Enterprise Zone** Boroughs of Hackney and Tower Hamlets in partnership with London Legacy Development Corporation
- L **Tobacco Dock** Shadwell

**3 Deptford and New Cross.** Creative Enterprise Zone status and action plan shape economy to focus on creative activity and the existing spark created by university spin outs increasingly evolves to realise the opportunity of Goldsmith's specialism in Augmented Reality.

- ↳ **Goldsmiths University of London** New Cross
- ↳ **Trinity Laban Conservatoire of Music and Dance and The Albany** Deptford
- ↳ **Deptford Foundry** Deptford and New Cross
- G **SHAPES Lewisham, Creative Enterprise Zone** Deptford and New Cross

- L **Goldsmiths Enterprise Hub** Deptford and New Cross
- L **Horniman Museum Creative Hub** Forest Hill
- L **Convoys Wharf and New Bermondsey Masterplan** Deptford
- L **Artworks Creekside** Deptford

**4 Greenwich, Charlton and Woolwich.** Design, culture and creative embedded at the heart of large scale regeneration delivery in North Greenwich and Woolwich.

- ↳ **Trinity Laban Conservatoire of Music and Dance** Greenwich Campus
- ↳ **University of Greenwich** Greenwich Campus
- ↳ **Ravensbourne** Greenwich Peninsula
- G **Woolwich Works** Woolwich
- G **Greenwich Design District** Greenwich
- L **Thames-Side Studios** Woolwich
- L **Charlton Riverside Masterplan** Charlton
- L **Emergency Exit Arts, Rothbury Hall** Greenwich

**5 Royal Docks.** A new hub for creative and enterprise collaboration anchored by the Enterprise Zone - it will incubate creative production for the whole Estuary.

- ↳ **Silver Building (meanwhile)** Royal Docks
- ↳ **Bow Arts RAW Labs** Royal Docks
- ↳ **UEL** Royal Docks
- ↳ **London Design and Engineering University Technical College** Royal Docks
- G **Silvertown Quays Creative District** Royal Docks
- L **Millennium Mills Employment Hub** Royal Docks

**6 Barking.** Developments focused on artists and makers catalyse further activity and support the area to become a viable place for them to live and work.

- L **A House for Artists** Barking

**7 Thamesmead.** Culture-led regeneration supports residential and workspace opportunities for creative freelancers and SMEs.

- L **Bow Arts Lakeside Centre** Thamesmead
- L **Plumstead Power Station** Plumstead

**8 Bexley.** A Theatre Making Centre would support national touring

productions, building upon the strength of Rose Bruford and Bird Colleges while a Place and Making Initiative would provide a focal point for maker collaboration and education in the Estuary.

- ↳ **Bird College** Sidcup
- ↳ **Rose Bruford College** Sidcup
- G **Theatre Making Centre** Bexley
- L **Engine House** Erith
- L **Place and Making Initiative** Erith

**9 Dagenham.** Realisation of Dagenham Film Studios creates an internationally significant hub for film and television production.

- G **Dagenham Film Studios** Dagenham
- L **East London Works** Dagenham

**10 Rainham.** Development of Centre for Engineering and Manufacturing Excellence, building identity around future industry.

- ↳ **Centre for Engineering and Manufacturing Excellence** Rainham
- L **Bretons Manor** Rainham

**11 Dartford.** Town centre re-branding and re-modelling focusing on placemaking, creative meanwhile uses and establishing the future of the Orchard Theatre.

- L **North Kent College (Miskin Theatre)** Dartford
- L **Orchard Theatre and Shopping Centre** Dartford
- L **Dartford Northern Gateway Development Sites** Dartford
- L **London Resort** Swanscombe Peninsula

**12 Purfleet.** Evolution of Royal Opera House and High House Production Park alongside Purfleet Media Village create an internationally significant hub for film, TV and games post-production. Growth is accompanied by investment in producing theatre and workspaces.

- ↳ **High House Production Park** Purfleet
- ↳ **The National College for Creative Industries** Purfleet
- ↳ **University of the Arts London, South Essex College and the Royal Opera House Costume Construction Degree** Purfleet
- G **Purfleet-on-Thames Media Village** Purfleet

**13 Ebbsfleet.** Culture-led development in Ebbsfleet Garden City supports innovation in community-led cultural programming and with space to deliver production activity at scale.

→ G **Ebbsfleet Central** Ebbsfleet

**14 Grays, Tilbury and Corringham.** Town centre revitalisation supported by an increasingly visible presence of cultural and creative production.

☰ **The Performers College**  
Corringham

→ L **Tilbury Cruise Terminal**  
Tilbury

→ L **Bata Factory** East Tilbury

→ L **Thameside Theatre and Complex** Grays

→ L **Coalhouse Fort** East Tilbury

**15 Gravesend.** Realisation of creative workspaces at Customs House and the Henley Building deliver visible creative production in the town centre.

→ L **Customs House** Gravesend

→ L **Northfleet Embankment**  
Gravesend

→ L **Gravesend Canal Basin**  
Gravesend

**16 Basildon.** Supply chain and grassroots activities are supported through new town centre facilities and through further diversification from traditional manufacturing to creative and cultural production.

☒ **The Underwater Studio** Basildon

→ G **Basildon Town Centre Regeneration** Basildon

→ L **Innovation Warehouse, Watt Tyler/town centre** Basildon

**17 Maidstone.** Existing strengths in film and television production will strengthen and, alongside other developments (e.g. Kent Medical Campus), support higher value employment.

☒ **Maidstone Studios** Maidstone

**18 Chatham.** Chatham becomes established as a regionally important cultural hub, supported by the development of the Institute of Creative and Cultural Industries at the University of Kent.

☒ **Historic Dockyard Chatham**  
Chatham

☰ **University of Greenwich** Chatham Campus

☰ **Canterbury Christ Church University** Medway Campus

☰ **University of Kent** Medway Campus

☰ **Institute of Creative and Cultural Industries** Chatham

☰ **University for the Creative Arts**  
Rochester Campus

→ L **Chatham Waters** Chatham

→ L **Dockyard 'Interface land'**  
Chatham

→ L **Nucleus Arts** Chatham

→ L **Chatham Intra** Chatham

**19 20 Sittingbourne and Sheerness.** Sittingbourne and Sheerness repurpose historic assets and connectivity to create opportunities and spaces for cultural production.

→ L **Sheerness Dockyard Church**  
Sheerness

→ L **Sheerness Historic Dockyard**  
Sheerness

**21 Southend.** The northern foreshore Estuary hub for arts, creative and digital production and education.

☒ **Metal and NetPark** Southend

☒ **Focal Point Gallery** Southend

☰ **University of Essex, E15 Acting School** Southend

☰ **South Essex College** Southend

→ L **Forum 2** Southend

→ L **Airport Business Park**  
Southend

→ L **Old Fire Station** Hadleigh

→ L **Better Queensway** Southend

→ L **Southend High St** Southend

**22 Colchester.** Home to University of Essex, which has a growing AR/VR and games research focus.

☒ **Mercury Theatre** Colchester

☒ **37 Queen Street** Colchester

☒ **Firstsite Gallery** Colchester

☰ **University of Essex** Colchester

**23 Ashford.** New Creative Laboratory anchored by Jasmin Vardimon Company will drive change supported by further site capacity.

☒ **Jasmin Vardimon Dance Laboratory** Ashford

→ G **Newtown Works** Ashford

**24 25 Canterbury and Whitstable.** Economic identity becomes established around arts, design and crafts anchored by the Whitstable Biennale. Increasing emphasis on innovation, led by the Canterbury Christ Church University and the University of Kent.

☰ **Canterbury Christ Church University** Canterbury Campus

☰ **University for the Creative Arts**  
Canterbury Campus

☰ **University of Kent** Canterbury

**26 Folkestone.** Culture-led regeneration by Creative Folkestone including the Folkestone Triennial and the Creative Quarter, developing as a cultural hub for the South East.

☒ **Creative Folkestone** Folkestone

☒ **Creative Quarter** Folkestone

☒ **Folkestone Triennial** Folkestone

**27 Ramsgate.** Art and co-commissioning supports further town centre renewal, including repurposing of high street and heritage properties as creative production space.

☒ **Spacer** Ramsgate

→ L **Pugin Studios** Ramsgate

→ L **Ramsgate High Street**  
Ramsgate

**28 Margate.** The southern foreshore Estuary hub for arts, creative and digital production and education.

☒ **Resort Studios** Margate

☒ **Turner Contemporary** Margate

☒ **Marine Studios** Margate

## Key

☒ **Major Production Facilities and Local Anchors:** existing spaces and projects which have been identified as playing an important role in underpinning the Estuary's creative and cultural ecosystem.

☰ **Higher and Sector Specialist Education Institutions:** current and proposed education institutions which have a crucial role to play in developing talent, driving research and innovation, and supporting sector development.

→ **Future Creative and Cultural Projects** – projects in development or delivery which are supporting the continued growth and evolution of the Estuary's creative and cultural sector. These include:

→ G **Growth Engines:** Larger scale initiatives which have the potential to be transformational in supporting the development of the sector

→ L **Local Sparks:** Smaller scale projects supporting the development of creative, cultural and production activities in the Estuary's places.



The Estuary is home to 63 higher and further education institutions: some of these, such as Goldsmiths and the University for the Creative Arts, are national leaders in the creative industries

### 3. WHERE ARE WE NOW?

The Thames Estuary Production Corridor is a tailored response to the unique characteristics which define the Estuary's economy:

- The Thames Estuary is already home to an **established creative and cultural ecosystem**. This ecosystem is comprised of a diverse network of production and consumption anchors and both embedded and nascent business clusters. **Partners across the area are already working together** to support and strengthen this ecosystem.
- The Thames Estuary is a **region of opportunity**, with a broad network of economic assets and infrastructure, a large amount of space and capacity for growth, and momentum in terms of investment growth.
- While well established, there is significant **headroom for growth**, with evidence of leakage of creative workers away from the Estuary and potential to better harness creative talent locked within the wider economy.

## An Established Creative and Cultural Ecosystem

The Estuary has an established creative and cultural ecosystem. It is home to production assets of national and international importance, vibrant clusters of creative makers and producers and a diverse network of places which are defined by their distinctive creative and cultural offerings.

The development of the sector over the past decade has been rapid. Investment in major creative and cultural production assets (such as English National Ballet's new home on London City Island and High House Production Park in Thurrock), has been mirrored by rapid growth in the number of creative and cultural production businesses, locating, starting-up and growing across the Estuary.

In total, prior to COVID-19, creative and cultural **production** was worth £3.7bn to the Thames Estuary economy, with more than 16,000 businesses supporting over 46,000 jobs.

In reality, the scale of the sector was likely to be even greater. The sector supports a large number of freelancers, with latest estimates suggesting that this figure could be

as high as 17,000 across the Estuary. Business and employment growth have been 37% and 32% respectively since 2011, which outstrips national averages for the sector (20% and 26%). It is also faster than the rate of growth observed across the Estuary economy as a whole.

Recent growth reflects strong business start-up rates in the Estuary. Over 4,100 creative and cultural businesses started-up in 2017 (31 start ups per 1,000 businesses). Creative start up rates are particularly strong in East London which, over the past decade, has become established as one of the most vibrant locations for enterprise and start-ups nationally.

There is also increasing evidence of the creative economy infiltrating and becoming more fundamental to the wider business ecosystem:

- There are 9,000 jobs and 900 businesses focused on creative and cultural **consumption** activities which underpin production. These have grown by 19% and

22% respectively since 2011 which is faster than growth rates observed at the national level (7% and 13%)

- There are 51,000 jobs and 9,000 businesses in the supporting supply chain, these have grown by 18% and 23% respectively since 2011, with employment growth outstripping change at the national level (11%)

The development of the sector has been supported by proactive public investment and policy development; from the work of the Mayor of London and the South East LEP to the case making and broader economic development activities of the Estuary's 18 local authorities. Recent examples include:

- £4.3 million investment from the DCMS Cultural Development Fund across the Estuary in Essex and Kent
- £350,000 investment from MHCLG to support master planning and feasibility studies and develop the Thames Estuary Production Corridor
- £11m investment from the Mayor of London in the first Creative Enterprise Zones, including two in the Estuary: Hackney Wick and Fish Island (Boroughs of Hackney and Tower Hamlets in partnership with London Legacy Development Corporation) and New Cross and Deptford (Borough of Lewisham)
- The placement of culture and creativity at the heart of many of the Estuary's largest regeneration projects, from the Royal Docks and Stratford, out to Thamesmead, Greenwich, Ebbsfleet and Thurrock

These dense creative and cultural networks, businesses and institutions provide a deeply embedded and compelling platform from which the Thames Estuary Production Corridor can build.

## **Production Hubs and Facilities**

As highlighted by The Thames Estuary Production Corridor: A Network of Creative Places map (p. 16-17) the Estuary's production sector is underpinned by a range of important production anchors. Significantly, there is also a strong supply of large-scale production facilities and spaces in the pipeline: from Dagenham Film Studios, to Greenwich Design District and Purfleet-on-Thames Media Village.

Investment in these anchors over the past decade has driven wider benefits in terms of forging new economic and cultural identities (both locally and regionally); supporting local placemaking aspirations and providing the focal point for the growth of new creative production clusters.

## **Creative and Cultural Clusters**

The majority of the Estuary's 16,000 production businesses are found within established and emergent clusters of existing business activity across the Estuary. These clusters provide the impetus for growth, diversification and development and many of the businesses in them have evolved from industrial manufacturing to serving creative industry demand.

There is a strong concentration of production businesses in the London boroughs with distinct areas of activity in the North Kent Coast and South Essex. Notable clusters exist in Margate, Canterbury, Faversham, Medway, Gravesend, Grays, Dartford, Erith, Woolwich, Deptford, Stratford, Barking, Romford, Basildon, Rayleigh, Hadleigh, Leigh-on-Sea and Southend Central. Outside London, businesses tend to be clustered around populous areas with good transport infrastructure and where previous targeted public sector investment and intervention has occurred (e.g. Southend, Margate, Thurrock and Medway). Significantly, these clusters are relatively close to one another and to the large creative and cultural consumption cluster in London. This is an important comparative advantage of the Estuary over other parts of the UK.

## **Beneath the Surface: A Vibrant and Diverse Creative and Cultural Economy**

Statistics can only tell us so much and in a dynamic economic context and even without the projected impacts of COVID-19, data will often present an outdated picture. Looking beneath the surface reveals interesting and smaller scale creative production in unexpected places. Industrial estates, high streets, visitor attractions and town centres host a range of production activity ranging from photography and music production to print making, set design and fabrication. Much of this activity is not identifiable through statistical analysis.

A series of on-the-ground observation studies captured creative production workspace clusters and local specialisms. Through on-site observational research, mapping and engagement with local businesses, these studies helped to verify statistical sector mapping to 'get ahead' of the data on creative production in the Thames Estuary Production Corridor and (most importantly) identify the nascent potential of certain places.

These studies were carried out in selected locations across the Thames Estuary, with a focus on employment areas (industrial land and town centres), gathering illustrative evidence to demonstrate the range of creative activity, workspace, skills and networks already in place across the Thames Estuary Production Corridor. This evidence helps to ensure that the Thames Estuary Production Corridor can build on to the on-the-ground realities and capacities of production and workspace across its diverse geography:

- In Basildon: Dispersed specialised production activity serving the film and theatre sectors, supported by strong supply chain capacity in advanced manufacturing.
- In Margate: An inward migration of a skilled creative workforce, working across a mix of visual arts, craft, digital and photography activities.
- In Medway: A strong concentration of supply chain activities to the creative industries, particularly in manufacturing, materials and transport activities, neighbouring local visual arts, print-making and fashion specialisms.
- In Southend: Strong networks of creative practitioners (virtual and physical), with industry experience and good digital infrastructure to support remote working and a concentration of digital marketing activities.
- In Erith: Large-scale specialist fabrication activities and services, alongside materials suppliers useful to creative production activities.
- In Deptford: A strong presence of creative education institutions and a mix of crafts, digital and performing arts production activities in workspace hubs.

Much of this activity is in sectors which do not consider themselves as creative and would not be classified in statistics related to creative businesses. They have emerged disparately and have been agile to changes in demand. The role that these businesses play in the supply chain of the South East creative economy should be celebrated. They should also be supported to scale their activity, upskill residents and workers and become a more active and visible part of the supply chain as this will help deliver growth and agglomeration benefits.

Production studio, English National Ballet's new home on London City Island, Tower Hamlets –  
Photo: Michael Molloy



WHERE ARE WE NOW?

27

# A Region of Opportunity

While rooted in the existing creative and cultural ecosystem, the Thames Estuary Production Corridor builds on the growth momentum and trajectory of the Estuary as a whole.

The economic value and potential of the area is well established. The Estuary has a diverse and growing economy and, with total GVA per annum of £3.9 billion, makes a significant contribution to national economic output.

However, challenges also persist. While located within the largely prosperous South

East, the Estuary is home to some of the most disadvantaged and excluded communities nationally, and long-standing challenges remain in terms the quality and coverage of transport, digital and social infrastructure.

Over the last two decades, local stakeholders have focused on supporting growth and investment in the area in response to untapped potential and concentrations of socio-economic deprivation.

The **Thames Estuary 2050 Growth Commission** report published in 2018 set out a vision for the Thames Estuary to become “a tapestry of productive places along a global river” with the potential to deliver 1.3m new jobs and £190bn additional GVA by 2050. The Thames Estuary Production Corridor was highlighted as a key initiative that will support this. The Government has responded positively to the report and has committed to support a range of proposals - £4.6m has been put aside for the Thames Estuary Production Corridor and a new Thames Estuary Growth Board, chaired by the Estuary Envoy, has been created.

Launched in July 2020, the **Thames Estuary Growth Board's** action plan, *The Green Blue*, sets out a road map to coordinate, clarify and bring forward Thames Estuary based investment propositions to Government to drive growth. It recognises and values the role that culture and creativity play in happy and successful places and the significant role that, as a sector, it can play in growing the economy. To that end, it outlines the Growth Board and Envoy's support to the Thames Estuary Production Corridor.

The **Mayor's Economic Development Strategy** is the Mayor of London's strategy to unlock growth in the capital. It identifies the Thames Estuary as a place where there is significant capacity for growth with the delivery of the Thames Estuary Production Corridor as a key enabler as this. The Mayor has also published the **Culture for All Londoners** Strategy which sets out the importance of the creative and cultural sectors to London's economy and people, and champions new centres of creative production and consumption, especially in the Thames Estuary.

**SELEP's Economic Strategy Statement** is the LEP's plan to deliver growth in the South East and is the pre-cursor to their Local Industrial Strategy. It identifies the Thames Estuary as one of its top priorities for growth and sets out that the Thames Estuary Production Corridor should be a key part of this. Significance is also placed on developing the creative and cultural industries across the LEP area.

This strategic focus is already delivering tangible outcomes and billions of pounds of public and private investment, including:

- The opening of Crossrail which will connect East London and parts of Essex to central London, Heathrow and beyond
- £314m investment to be carried out over five years to deliver comprehensive regeneration of the Royal Docks
- £1bn transformation of the Port of Tilbury
- Delivery of 15,000 new homes within the Ebbsfleet Garden City
- East Bank, a £1.1bn development to create one of the world's largest culture and education districts at Queen Elizabeth Olympic Park

- Emergence of new creative and cultural anchor institutions such as Purfleet Media Village, Dagenham Film Studios and Poplar Works
- The designation and investment in new Creative Enterprise Zones in Lewisham and Hackney Wick and Fish Island.

## **Estuary Economic Assets and Infrastructure**

### **Transport and Digital Infrastructure**

The region currently benefits from extensive rail connectivity – a dense rail network exists within London and the metro areas and frequent mainline services also extend out to areas across Kent and Essex. The North Kent Coast also benefits from High Speed 1 and connects to Europe via the Eurostar. The region also has several important road networks (including the M25) that connect it to the rest of the country and the world via City Airport and London Southend Airport.

Several major transport improvements are also underway or planned, including the completion of Crossrail (which will provide new connections from East and South East London to central London, Canary Wharf, Heathrow and Reading) alongside highway improvements on the M25, A2/M2, M20 and A13. Proposals to extend Crossrail from Abbey Wood to Ebbsfleet, as well as the new Lower Thames Crossing to relieve the M25 at Dartford, are also under consideration.

The Thames Estuary has strong levels of superfast broadband coverage, and the availability of ultrafast broadband is also considerable but is largely restricted to urban areas and centres of population density. Full fibre availability is minimal.

### **Labour Market**

The Estuary has access to one of the largest, most highly skilled and mobile workforces in the world.

In total, there are around 1.8 million economically active residents across the Estuary. Around 900,000 residents (37% of the population) have a degree level qualification (NVQ 4+) with around 55% NVQ3+ certified.

This workforce represents an important resource for the Thames Estuary Production Corridor. Over 100,000 Estuary residents are already employed in creative occupations, while many more are likely to have creative skills and specialisms while working in occupations which are categorised in other ways. Harnessing the potential of this talent and unlocking creative potential across the wider workforce is integral to the aspirations of the Thames Estuary Production Corridor.

There is also a clear opportunity to build on the existing labour market strengths by creating and delivering targeted skills and training programmes and by improving the diversity of the creative industries workforce.

### **Space for Growth**

Partly as a legacy of the industrial heritage of the area, the Estuary has significant space and capacity for growth; from decommissioned docks and former manufacturing campuses, to opportunities to intensify uses within existing town centres and fringe locations in response to growing demand. Relative affordability of land and space (benchmarked within the London and South East context) is a considerable advantage.

There is already significant momentum across the area, highlighting the strong demand which exists. This ranges from regionally important regeneration programmes in the Royal Docks, Stratford, Woolwich and Ebbsfleet, to more local programmes of town centre investment and house building in towns across the Estuary. While delivery challenges exist (particularly in terms of infrastructure needs), the scale and breadth of the opportunity is perhaps unique within the south of England.

# Headroom for Growth

Despite its rapid growth and investment in recent years and the potential impacts of COVID-19, there remains significant headroom for growth for the production sector across the Estuary. The creative and cultural sector has been on an upward trajectory, with the full benefit and impact of new production facilities and assets playing out on an ongoing basis in terms of the development and strengthening of creative networks and clusters.

There are c.100,000 people who have creative and cultural jobs (Creative Occupations) in the Thames Estuary, but only around 55,000 roles within creative and cultural businesses<sup>2</sup> (creative employment) – a difference of around 45,000. It is likely that the surplus accounts for people working outside the region or who have creative roles within non-creative businesses.

There are also a growing number of people who are self-employed in the creative and cultural economy in the Thames Estuary, with an estimated 17,000 freelancers.

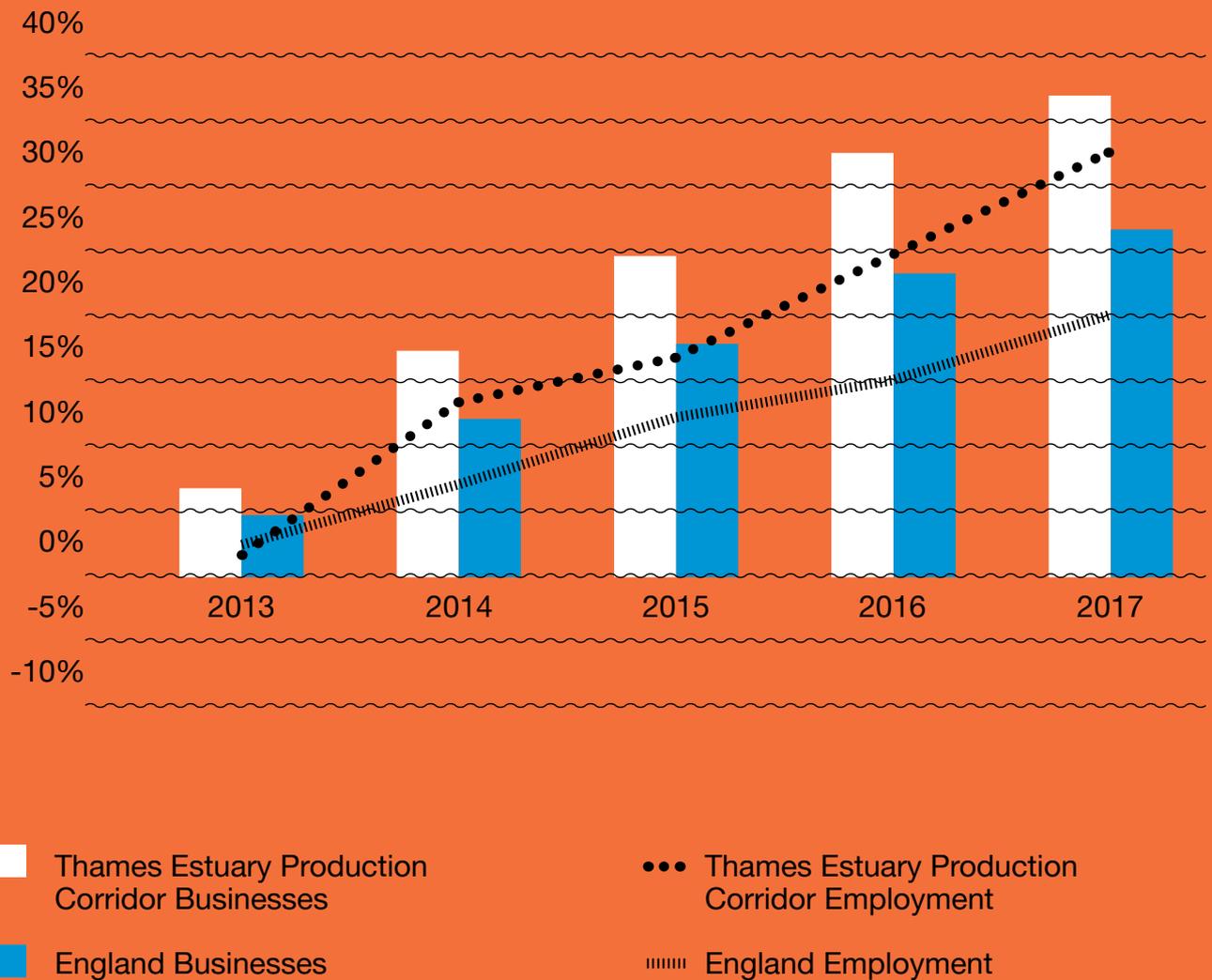
Evidence shows that the sector could become more productive and contribute more to local and regional economies. Even though it has been rapidly growing and becoming increasingly specialised, the Gross Value Added (GVA) per full time equivalent job (FTE) in the creative sector in Kent and Essex is around £10,000 lower than the England average for the sector.

The Thames Estuary Production Corridor seeks to harness latent talent and potential.

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<sup>2</sup> Incorporating creative and cultural production and consumption employment

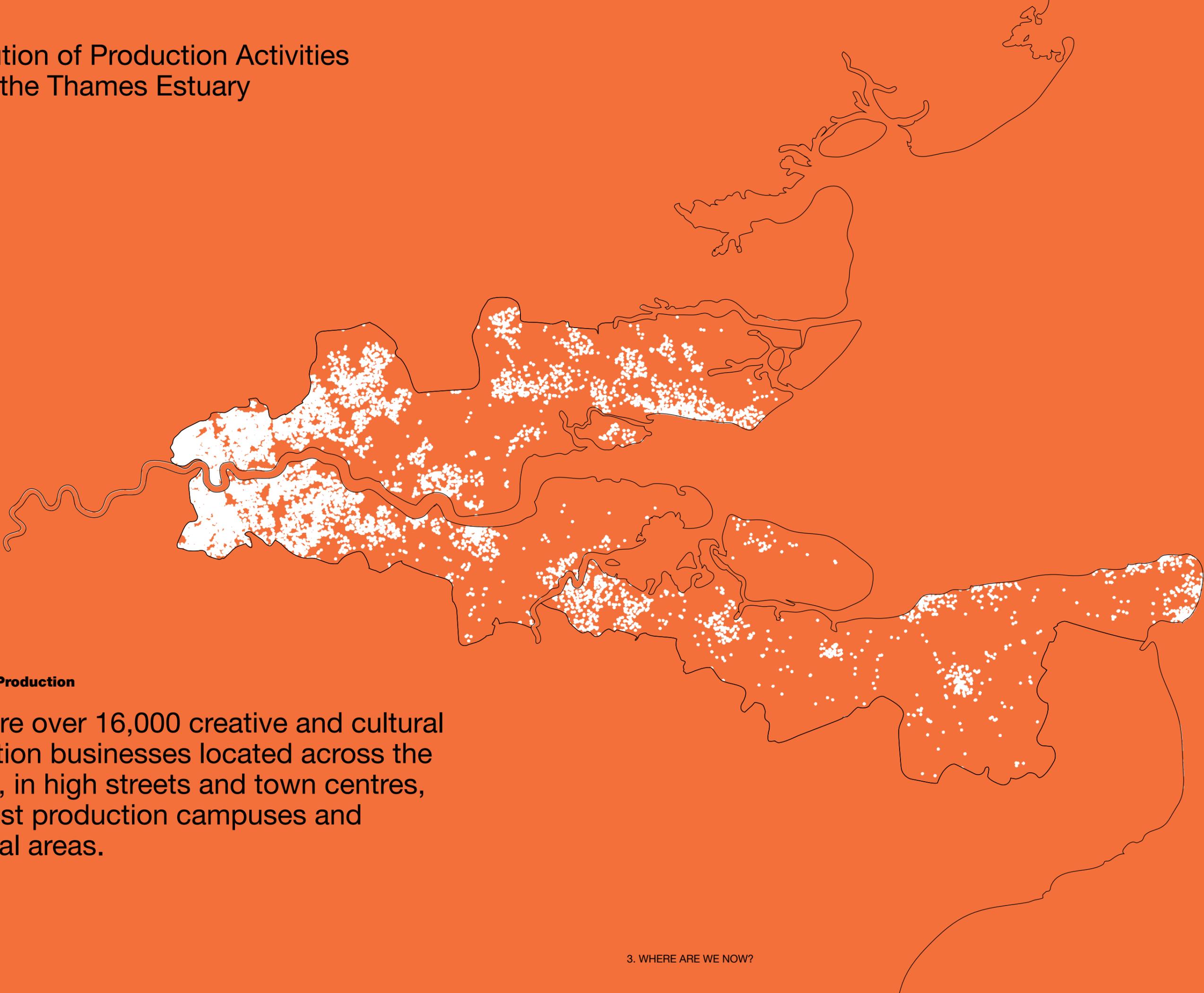
# Production employment and business growth



## Strong growth momentum

Creative and cultural production activity has been growing rapidly over the past five years, with the number of businesses and jobs increasing by 37% and 32% respectively, outstripping national averages

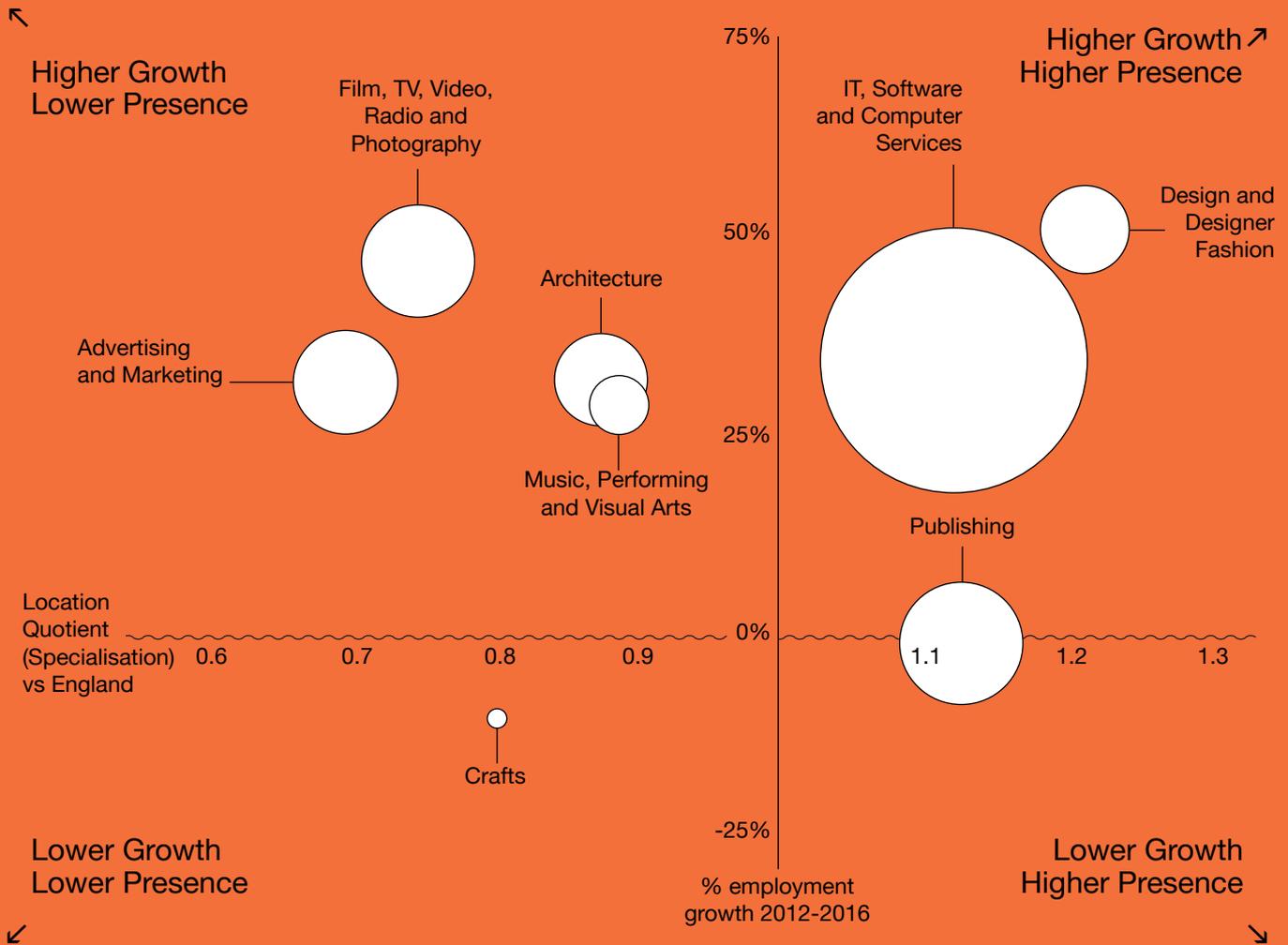
# Distribution of Production Activities Across the Thames Estuary



## A Region of Production

There are over 16,000 creative and cultural production businesses located across the Estuary, in high streets and town centres, specialist production campuses and industrial areas.

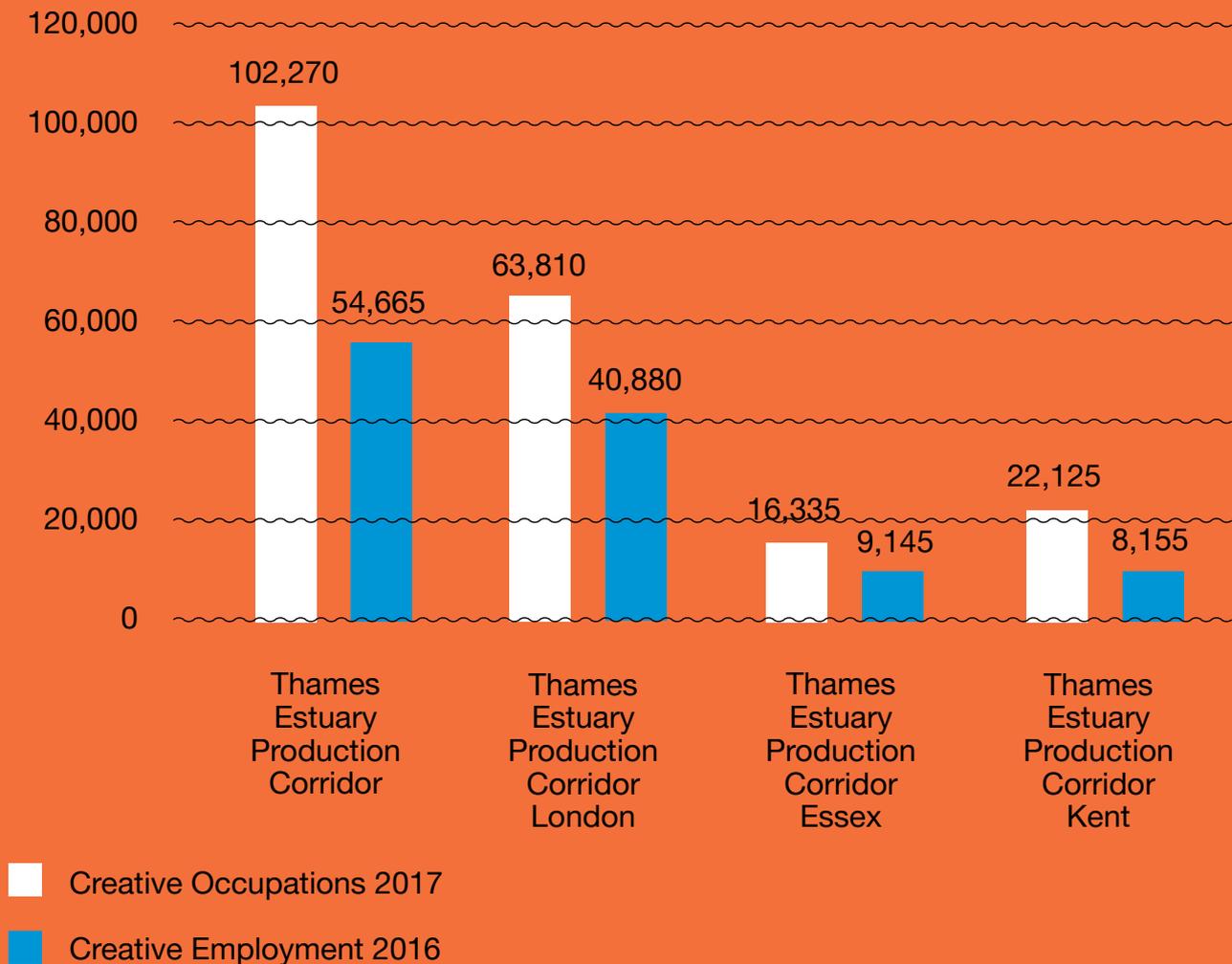
# The Make Up of the Estuary's Creative and Cultural Production Sector



## A diverse set of production activities

The Estuary's production sector comprises a diverse range of sub-sectors, nearly all of which have been growing in recent years. The largest and most specialised sub-sector is IT, Software and Computer Services. Strong specialisms also already exist in fashion and publishing.

# The Thames Estuary Production Corridor's creative workforce



## Significant latent capacity within the Thames Estuary's creative workforce

There are over 100,000 people living in the Estuary who work in creative and cultural occupations, but only around 55,000 creative and cultural jobs in the area – a difference of 45,000. That surplus accounts for people working outside the region or who have creative roles within non-creative businesses.



There are currently  
over 150 creative,  
cultural and  
production projects  
in development  
across the Estuary,  
building on over  
£200m of investment  
in large scale  
production facilities  
over the  
past decade

## 4. WHY INVEST

### The Case for Investment

The Thames Estuary Production Corridor is a contemporary opportunity to respond to pressing need and to harness and unlock latent potential. It has relevance and resonance at multiple spatial scales: from contributing to national growth priorities, down to unlocking economic and participation opportunities at the most local level:

- The Thames Estuary Production Corridor is a **direct response to national growth priorities** regarding the creative and cultural industries as set out in the Government's Industrial Strategy and Creative Industries Sector Deal. The industries are fundamental to the UK's future economic vitality and competitiveness and pre-COVID-19 were worth over £111 billion per annum to the UK economy and employing over two million people. They provide productive and resilient jobs and support the evolution of more diverse and distinctive places across the country.
- It responds to significant **creative and cultural sector demand**: from local, national and international markets. It recognises that the sector is highly diverse, cutting across and serving the economy as a whole; the specific opportunity will vary from one place to the next and evolve over time.
- It presents a time limited opportunity to **embed culture and creativity within new developments** and changing places across the Estuary: from the Royal Docks, to Thamesmead and Ebbsfleet.
- The Thames Estuary Production Corridor responds to constraints which are currently placing **creativity and culture at risk** in London and the South East; particularly the supply and affordability of space for enterprise and large-scale production activity.
- The Thames Estuary Production Corridor responds to a broader set of **socio-economic and infrastructure challenges** which are constraining the considerable growth potential of the Estuary including: participation and prosperity, digital and transport connectivity, the strength of strategic and sector networks, and challenges regarding place and perception.

# Metal Art School



# Supporting National Growth Priorities

The creative and cultural industries are embedded at the heart of the UK's economy and future growth aspirations.

Pre COVID-19, the sector was growing twice as fast as other sectors since 2011<sup>3</sup> and the number of creative businesses was growing in almost nine in ten local economies over the same period. UK Labour Market projections<sup>4</sup> illustrated that this trajectory was likely to continue and that creative occupations would grow by over 5% over the next six years.

The relative value of the creative and cultural industries is well documented. Research has demonstrated that:

- They are more productive than other parts of the economy: on average, creative businesses with fewer than ten employees have a GVA per worker that is 20 percent higher than similar sized businesses in other sectors<sup>5</sup>.
- They also offer greater resilience. The tasks involved in their work (e.g. designing and performing) are hard to replicate and replace with algorithms, robots and machines. Sir Peter Bazalgette's Independent Review of the Creative Industries<sup>6</sup> states the vast majority of creative and cultural jobs are not at risk of automation, and the contribution that they make to the national economy will continue to increase steadily in coming years.

Over the past decade, the UK has established a position as a world leader in the creative industries. This is partly reflected by its success in exporting ideas and knowledge and in attracting inward investment: in 2016-17 alone, the UK attracted 151 creative and media projects from abroad, which generated 3,700 jobs<sup>7</sup>.

However, the future is far from certain: the rapidly evolving global economy, economic and political uncertainty caused by events such as Brexit, and the scale of ambition of other regions and cities across the world all pose a threat to the vitality and prominence of the UK's creative and cultural sector. Projected impacts of the COVID-19 pandemic currently unfolding are concerning.

In light of this, supporting the development of the creative and cultural industries forms a central plank of the UK's Industrial Strategy. While the UK already has a strong core of assets and pipeline projects, continual investment and innovation will be required to keep pace with the ambition of others and to maintain competitiveness. Protecting and enhancing the UK's competitive position will require the right policies, infrastructure and facilities to be in place.

The Thames Estuary Production Corridor offers a direct response to this: supporting the development of a cluster of internationally important assets, underpinned by the infrastructure, talent and ideas needed to ensure long term resilience and relevance.

In 2019, as part of the UK Research and Innovation's Strength in Places programme, a cross-Estuary bid to develop *Performing Productivity: Screen, Stage and Performance Production Technology for Economic Growth*, led by University of the Arts London (UAL) in partnership with Kent and Essex Universities, was awarded seed funding to boost research and innovation capacity in the Thames Estuar

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<sup>3</sup> [Creative Nation](#), 2018, Nesta and Creative Industries Council

<sup>4</sup> [Creativity and the Future of Work](#), 2018, Nesta and Creative Industries Federation

<sup>5</sup> [Creativity and the Future of Work](#), 2018, Nesta and Creative Industries Federation

<sup>6</sup> [Independent Review of the Creative Industries](#), 2017, Sir Peter Bazalgette

<sup>7</sup> [Inward Investment Results, Department for International Trade](#), 2016-17

# Responding to Market Demand: Boosting National, Regional and Local Production Capacity

The rapid growth of the creative and cultural industries is driving demand across the country for the development of new infrastructure and facilities to support this growth and further growth.

This, alongside devolution, is driving a new period of cultural infrastructure development across the UK. Investment is being made in a range of spaces (workspaces, film studios, making hubs, print studios), and across a range of sectors. The Thames Estuary Production Corridor aims to complement the development of the sector across the country, building on and supporting them.

The Northern Powerhouse, Midlands Engine and several Local Enterprise Partnerships across the UK have prioritised the delivery of cultural and creative assets. The Midlands Engine, for example, has a number of existing or emerging assets, including: Mercian Studios (Birmingham), STEAMHouse (Birmingham), FarGo Village (Coventry) and the Manufacturing Technology Centre (Coventry). Similarly, the Northern Powerhouse has The Factory (Manchester), The Making Rooms (Blackburn) and Production Park (Wakefield). This investment is being mirrored across other parts of the country, with significant activity occurring in places like Sheffield, Wakefield, Nottingham, Bristol, Cardiff, Glasgow, Edinburgh, Dundee, Inverness and Perth.

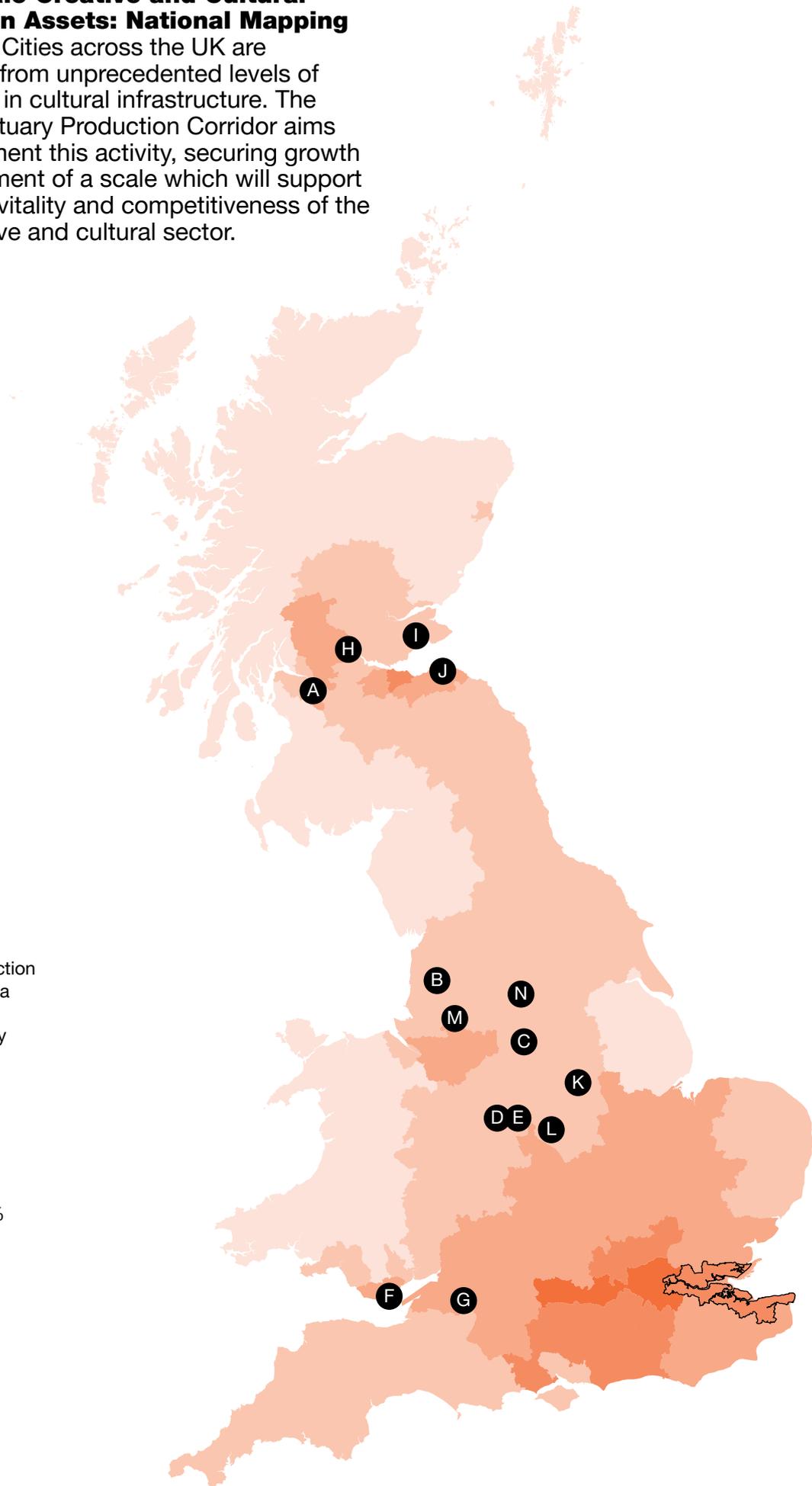
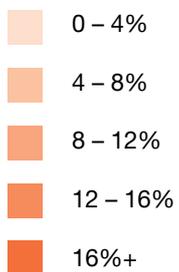
The Thames Estuary Production Corridor is framed by this national context. It is a bespoke response to the full breadth of sector demand being generated: locally, regionally, nationally and internationally. By taking a regional approach it aims to deliver scale and critical mass.



## Large Scale Creative and Cultural Production Assets: National Mapping

Towns and Cities across the UK are benefitting from unprecedented levels of investment in cultural infrastructure. The Thames Estuary Production Corridor aims to complement this activity, securing growth and investment of a scale which will support the overall vitality and competitiveness of the UK's creative and cultural sector.

Creative and Cultural Production Businesses as a Proportion of the Economy



### **A Glasgow**

Creative Clyde - Expanding on the regenerated riverfront in Glasgow by continuing to develop a community for media, technology and creatively-minded businesses to work, socialise or live. Residents include BBC Scotland, STV, Capital Radio, BIP Solutions, SEC, Film City Glasgow and Glasgow School of Art's Digital Design Studio.

### **B Lancashire**

Making Cluster – Blackburn. The Festival of Making and Making Rooms (fab lab and hub) have kick-started wider ambitions to become a national cluster of creative making – with workspace, skills and investment programmes.

### **C Sheffield**

City-region focus on making and advanced manufacturing, including Advanced Manufacturing Park and a range of production spaces and programmes.

### **D Birmingham**

Mercian Studios – new 20 acre film and television studios with 6 sound stages and one 'shiny floor' studio for live TV shows.

### **E Birmingham**

STEAMHouse - Major new centre for innovation and creation. It operates as a creating and making hub, providing business support, expert guidance, the latest equipment and new collaborative opportunities.

### **F Cardiff**

Integrated cluster linked to major film and television studio growth.

### **G Bristol**

Integrated cluster across a range of art forms and facilities. This includes regionally significant hubs such as Bottle Yard Studios, Spike Island, Engine Shed and strong Higher Education Institutions intervention.

### **H Scotland Wide**

Wasps studios - Wasps (Workshop and Artists Studio Provision Scotland) is a charity that provides affordable studios to support artists, arts organisations, and creative businesses. They currently house about 800 artists and 33 organisations at 18 buildings across Scotland. Currently developing spaces in Inverness and Perth where they have identified a clear dearth in facilities supporting artists, makers, and creative industries.

### **I Dundee**

Dundee Contemporary Arts (DCA) Print Studio - State-of-the-art facilities to create print, photography and digital work. The studio houses everything from a Victorian relief press to 3D printers and a laser cutter.

### **J Edinburgh**

Collective – is currently redeveloping the City Observatory complex on Calton Hill, Edinburgh. This will include a brand-new exhibition and office space embedded in the hillside in front of the City Observatory.

### **K Nottingham**

Confetti Institute of Creative Technologies – a major learning and industry hub, led by Nottingham Trent University.

### **L Coventry**

FarGo space – repurposed industrial site for creative businesses in Coventry's Creative Quarter. Viewed as Phase 1 in production infrastructure development – leveraging UK City of Culture 2021.

### **M Manchester**

The Factory – new cultural space being built in the centre of Manchester, due to open in 2021 and anchor for the Manchester International Festival. Containing 13,500 square metres of floor space, with warehouse and theatre space.

### **N Wakefield**

Backstage Academy Campus – training and skills facility for the live events sector; offering a range of degree and short courses.



# Creative and Cultural Production Sub-Sectors Demand

The table overleaf provides a review of the needs and requirements of the diverse range of activities associated with the creative and cultural sector.

The activities identified are derived from the 12 creative sub-sectors identified by the Creative Industries Federation, with a number of amendments to reflect the focus on production activities, and to allow more granular analysis of the varying spatial needs of specific production activities.

Key findings from the research include:

- There is demand for space in and around London from most activities (including Film and TV, Theatre, Art and Design, Set Design and Fabrication). While demand is driven in part by London's long standing reputation and draw as a global hub of creativity, it is also underpinned by the demand generated by the city's creative economy and the demand generated by the city's cultural consumption institutions (theatres, museums, music venues and exhibition spaces).
- A diverse range of spaces are needed; the most in-demand typologies include studio space, industrial space, rehearsal facilities and complementary offices. Many of these spaces are larger-scale in specification (at least 500 sqm) in order to accommodate production activity.
- While generating demand on their own, many of the sectors are interconnected. For example, Set Design and Fabrication feeds into and underpins Film and TV, Theatre, Dance, and Art and Design.

Category	Types of Space	Key Requirements	UK Demand and Geography	Thames Estuary Production Corridor Opportunity
Film and TV	Purpose built studios (e.g. Pinewood); repurposed buildings (e.g. converted warehouses or facilities); alternative spaces with blank canvas; shiny floor TV studios (e.g. Maidstone Studios)	High quality facilities; privacy and high security; large scale space; access to skills; close proximity to good road network; strong national and international connectivity; car parking	Global shortage of film and TV space; Film London estimates 8-10 blockbusters turned away each year due to lack of infrastructure supply; 1.9m sq ft of studio space is required in the UK <sup>8</sup> ; recent investment elsewhere (e.g. Cardiff and Belfast) meeting small proportion of supply; focus in West London with facilities across other parts of the country	Proximity to existing markets and skilled workforce means there is potential; proposals for new or better spaces in Dagenham, Maidstone and Purfleet demonstrate interest and potential; strong built and physical assets to attract filmmakers (especially in Kent and London); opportunity exists to draw or encourage supply chain companies to set up in the area <b>Emerging locations:</b> Dagenham, Purfleet, Maidstone, Ebbsfleet, Ashford
Music	Independent studio facilities remain vital; need for high specification studios (i.e. with production and mixing facilities that allow for recordings in stereo and 5.1 sound); demand for fully serviced offers (i.e. with access to engineers, equipment)	Proximity to wider industry – publishers, labels, management etc; proximity to consumption activity (e.g. bars, clubs, venues, retail); good transport connectivity to London and other cities	DIY recording has reduced demand for studio space for early career and informal musicians; studios remain vital for commercial release; demand for carry-in recording services is growing (e.g. recording on location or in DIY spaces); existing provision is clustered in central London (e.g. SNK and Dean Street Studios), with some larger facilities outside the West End	Area has limited music infrastructure; activity seen in central and West London not yet connected into area; emergent nodes in Southend, Margate and via facilities at High House Production Park demonstrate nascent potential; opportunity to become a more attractive environment for music production if studios can be encouraged to relocate or start up in emergent clusters <b>Emerging locations:</b> Southend, Margate, Purfleet, Dagenham (around film studios), Royal Docks
Theatre	Large scale creative studios for set design; re-purposed industrial space for production, rehearsal and storage; purpose-built spaces to support activity (e.g. High House Production Park)	At least 15mx15m of space for set design; at least 4m high ceilings to enable technical lighting rigs and set design; 3 phase power for lighting and other equipment; flexible space that can be used for 4-6-week periods	Lack of large, good quality rehearsal and storage space across London; developer bias toward delivering space for visual arts; cost of trucking goods from places outside London means that taking space outside the capital is not yet more viable than using more expensive centrally located space	Several significant assets related to theatre exist in the region demonstrating potential; there is a need to provide facilities in places that people can afford to live or get to relatively quickly <b>Emerging locations:</b> Purfleet, Bexley, Royal Docks
Dance	Production and rehearsal space of varying sizes; supporting space (e.g. offices, changing rooms; project space)	24-hour access; storage space for production sets/ props linked to rehearsal spaces; clean span layout with a minimum clearance of 10x10m and minimum 4m clear ceiling to allow for full movement; sprung floors (except for street dance)	Strong demand for space across different types of users; minimal supply of very large spaces (like 3 Mills Studios) across London; studio space across London, hubs have been developing in Leeds (Leeds Dance Partnership) and Birmingham	Distinct momentum in East London through English National Ballet's new City Island premises, Studio Wayne McGregor's new studio in Here East, Sadler's Wells expansion to East London Dance and Urban Development's forthcoming National Talent House for urban culture in Stratford - there is an opportunity to build on this by providing space than can be shared by different organisations, working with local authority workspace programmes; Momentum also exists in other parts of Kent and Essex (e.g. E15 in Southend) <b>Emerging locations:</b> New Cross and Deptford, Stratford, Dagenham, Southend

<sup>8</sup> ['Sites, Camera, Action'](#), the UK film and TV studio property market, Lambert Smith Hampton 2018

Category	Types of Space	Key Requirements	UK Demand and Geography	Thames Estuary Production Corridor Opportunity
Fashion	Studio or small industrial premises. Workspace for fashion designers typically operate as both a workshop for creative production, and as an office from which they run their commercial business. A workspace being presentable to clients and buyers is key, whilst remaining a functional space for production	Storage needs are substantial, potentially taking up to 50% of the studio space unless there is communal storage space available. Three subsets of storage should be considered: Materials for production Organised stock for sale Collections archive Multiple electrical sockets; moveable workbenches to adapt to different work stages; natural light is preferred, but not direct sunlight due to the possible sensitivities of fabrics	East London has a rich fashion and craft heritage. This will be enhanced through the the Fashion District as set out in a recent report by BOP <sup>9</sup> Consulting. The location of fashion studios is important, as it will often relate to the brand of the fashion label and the willingness of clients to visit	Opportunity to build on existing momentum in East London, including the Fashion District, the London College of Fashion (LCF) move to Stratford as part of the development of East Bank at the Queen Elizabeth Olympic Park and Poplar Works, supporting East London's fashion economy. <b>Emerging locations:</b> Tower Hamlets (Poplar), Stratford, Southend, Margate, Fashion District, Greenwich
Art and Design	Studios; gallery space; workshops	Private workspaces and studios; relatively easy and low-cost transport options; high proportion of wall area. Features like full-height glass frontages may be undesirable to some artists, with the exception of craft practitioners and makers who produce commercial work. External yard space can present opportunities for large scale making. Larger spaces should be capable of being arranged into separate working areas for different materials e.g. woodwork, metalwork and spraying	Close links to the London art market, the second largest in the world, are important for this sector. Artist workspace sites in London continue to show very high and continuous occupancy rates; demand for artists' workspace remains undiminished and highly competitive; e.g. new SPACE studios in Colchester fully let after two viewing days; studios increasingly opening in Greater London and Kent and Essex's coastal towns	New studios are emerging across the region, partly driven by sector growth and increasing commercial prices in London; Greenwich Design District will include workspace for artists and the creative industries at a range of affordable rents for flexible tenancies of up to 15 years; much new space is being taken by London-based artists; there is an opportunity to build more low-cost spaces that local artists can use; supply chain businesses (e.g. art shippers, large-scale printers and fabricators) are suffering most from rental increases so there is an opportunity for a regional response to supply chain needs <b>Emerging locations:</b> Southend, Whitstable, Margate, Dartford, Medway, Lewisham, Barking, Newham, Basildon, Greenwich

9 [Towards an East London Fashion District](#), 2017, BOP Consulting (London College of Fashion, UAL and the Mayor of London)

Category	Types of Space	Key Requirements	UK Demand and Geography	Thames Estuary Production Corridor Opportunity
Set Design and Fabrication	Industrial units; purpose-built spaces with anchor tenants who typically serve clients across the film, television, theatre and fashion industries	External yard space with industrial space; rigs and heavy lifting equipment for the movement of large-scale artworks, sets and exhibition builds; spaces for working with different materials; close proximity to good road network	Network of set making, prop making and exhibition fabrication across the South East linked to London's West End; emerging eastwards movement from central London locations, driven by workspace availability	Evidence of disparate activity across the Thames Estuary; range of sizes from informal warehousing units to bespoke spaces (e.g. High House Production Park); opportunity to link activity together more explicitly <b>Emerging locations:</b> Purfleet, Basildon, Bexley, Royal Docks
Software and Gaming	Fit out of space tends to be more important than physical characteristics; Space should allow shared working spaces alongside some dedicated space for small and growing companies	Strong broadband infrastructure; access to new talent; interior that supports creativity, playfulness and long working days; inclusion of latest virtual reality and augmented reality equipment would be beneficial; proximity to good rail network	Industry is growing and appears to be demand for space with the right characteristics	Gaming activity is growing rapidly at the national scale, with hubs in Guildford, Shoreditch, Cambridge, Manchester and Dundee; limited engagement with sector in Thames Estuary at the moment; opportunity to create small clusters in well-connected places: specific opportunity to build on GEEK festival of play and games developed by Marine Studios in Margate. <b>Emerging locations:</b> Margate, Royal Docks, Woolwich, Bexley, Medway
Architecture, Advertising and Marketing	Small and medium sized office space for desk based work; varied typologies required from co-working space to serviced office space and small office buildings	High speed and bandwidth internet connectivity; good public transport and/or road connectivity (parking often desirable outside of London); ability to easily meet clients in London; close to similar types of businesses and clients	Demand for low cost office space with good transport connectivity to London is high. Fewer issues in accessing office space in places outside South East except in major city centres	Architecture, advertising and marketing businesses are well established across the Estuary, particularly in London – potential exists to support these businesses to scale while also catalysing new businesses to start up and established businesses to re-locate into the area <b>Emerging locations:</b> town centre location across the Estuary, with smaller firms increasingly seeking lower cost space in fringe or light industrial area
Future Industry	Spaces that provide areas for immersion, experimentation and training; facilities do not need to be of factory scale due to the nature of the industry – physical assets can be highly disaggregated and connected digitally	High speed and bandwidth internet connectivity; industrial flooring; 3 phase electricity; 24-hour access; ability to accommodate large, expensive model factory equipment	High quality industrial space with required characteristics are difficult to find; price and availability of industrial space creating pressures in and around London; location of high value. Catapult Centres are broadly representative of current geographic basis in the UK (e.g. the Centre for Process Innovation in the North East)	Diverse set of activities emerging relating to industry 4.0 across the country; potential to develop hubs of activity across the Thames Estuary; specific opportunity exists to develop a hub of activity around Rainham, where the Centre for Engineering and Manufacturing Excellence is based – Havering Council, Havering College and SEGRO are developing an innovation hub based around VR and AR technologies <b>Emerging locations:</b> Royal Docks, Rainham, Stratford, New Cross, Basildon

## Long-Term Resilience: Responding to Evolving Markets, Processes and Technology

Perhaps more than any other sector, the creative and cultural industries are constantly evolving.

As the creative industries are not typically driven by material value, developments within production and processing are almost exclusively linked to the demand raised by evolution of other areas in the value chain. There are a broad range of factors and trends that provide significant opportunities and are driving change. These include:

- **Enabling technology:** trends that influence the underpinning systems and technology infrastructure utilised by the creative sector. Examples include connectivity (5G and connected devices), and automation (artificial intelligence and automated processes), both of which are linked by the internet of things.
- **New markets:** technology trends that are presenting new market places/spaces for the creative sector. Examples include: connected and autonomous vehicles, smart / playable cities, the personalisation of services, sharing economy and ethical consumption, blockchain / distributed ledgers, and health and technology (digital stress reduction).
- **Creative processes:** technology trends that are influencing both design (the tools and practices used to support design and innovation activities in the creative sector), and production (the mechanisms and processes by which good and services in the creative sector are produced). Examples include artificial intelligence and machine learning, development sandpits and digital modelling, advanced online modelling and collaboration tools, big and open data sets, analytics and visualisation, 3D printing and other accessible, rapid prototyping, and augmented and virtual reality.
- **Consumer experience:** trends that are influencing how consumers are experiencing creative sector outputs. Examples include: augmented reality, virtual reality, and big data (personalisation of services).
- **Distribution and marketing:** trends that influence the channels and media by which creative sector outputs are distributed to consumers. Examples include: subscription-based on demand content, always online / personal profiles, privacy and security, drone and robot delivery and user concern about screen addiction.

The Thames Estuary Production Corridor provides an opportunity to drive creative and cultural innovation regionally, nationally and internationally. It offers a mechanism to help the Estuary's sector stay at the forefront of new markets and technologies, rather than reacting to them.

This means supporting investment in cost-efficient access to tools that support design innovation (e.g. augmented reality) and rapid prototyping (e.g. 3D printing), supporting entry to markets where the creative and cultural sector has traditionally had a different or smaller role, and supporting the development of new business models for sustainable commercial success. Ongoing investment in education and skills will be necessary, particularly where disciplines more traditionally associated with the creative sector are brought together with digital competency and software development skills.

*Autobiography*, Company Wayne McGregor, Here East, Stratford  
Photo: Andrej Uspenski



# Building a Stronger and More Resilient Creative and Cultural Ecosystem across the Estuary

While well established, the Estuary's creative and cultural ecosystem is under pressure on a number of fronts.

Competition for space from residential uses and rising property costs are acting as a considerable constraint on the supply and affordability of workspace for creative and cultural businesses, institutions and organisations.

In part, these trends have supported the development of the sector over the past decade, with the London economy shifting eastward and the emergence of vibrant new creative and cultural hubs. However, the ongoing squeeze on space represents a significant threat to the vitality and long-term sustainability of many of the Estuary's established and emerging clusters.

The issue is significant in scale and pressing in timescales. While the Estuary benefits from a large amount of land and opportunities for regeneration and investment, supply of commercial and industrial floorspace is highly constrained. Pre COVID-19, vacancy rates had fallen by 38% to 5% for office space and by 58% to 3% for industrial space since 2012. This had been accompanied by a 36% increase in office rents to £31 per sq.ft and a 49% increase in industrial rents to £9 per sq.ft.

Without action, these trends will limit the expansion and viability of creative and cultural production businesses both within London and across the Estuary. Evidence from the GLA's Artists Workspace Study<sup>10</sup> (2018) further underlines that creative workspace is under threat:

- 87 percent of sites with artists on operate on rented or leasehold terms
- 24 percent of sites with artists on are at risk of closure within the next five years
- 17 percent of artist workspaces are at risk of closure within the next five years

If ambitions are to be realised there is a need to provide new workspace rapidly. Investment and a clear and supportive strategic and policy environment are required to govern and curate the evolution of the sector: from the location and supply of large-scale production facilities, to the pipeline of smaller scale mixed use workspaces.

The Thames Estuary Production Corridor provides a direct response to this. It recognises that the Estuary will remain a diverse place and that local competition for investment and growth will continue to exist. However, it signals that regional collaboration is necessary: working beyond boundaries to generate critical mass, develop stronger networks, and compete nationally and internationally.

It provides a new framework to support and manage the ongoing transition and evolution of the Estuary's economy, to identify new initiatives to support the long-term vitality of the sector and to protect and enhance the supply of workspace and production facilities.

It also recognises that approaches to space will need to vary across the Estuary. For example, while the workspace market is mature in East London, it is less well established across the towns of the North Kent Coast and South Essex. And while the lower commercial values to the east of the Estuary present an opportunity, they also present a challenge in terms of viability and deliverability with a greater need for public sector investment or stimulus. Workspace providers and investors are also less aware of the potential and opportunities presented by these locations.

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<sup>10</sup> [Artists Workspace Study Data Note](#), 2018, We Made That (GLA)

# Productive, Inclusive, Distinctive: Unlocking Local Potential

The reach of the Thames Estuary Production Corridor extends far beyond its direct focus on the creative and cultural industries.

The creative and cultural industries can play a role in supporting the development of more productive and resilient jobs and local economies, and in enhancing levels of

economic and cultural participation among local communities. Large-scale production facilities can provide an opportunity to professionalise and formalise training across the sector. Crucially, they can also support the development of more vibrant and distinctive places.

## **Local Distinctiveness: The Role of Creative and Cultural Industries in Placemaking**

The placemaking potential of the creative industries is well established, driving local identity, wellbeing and confidence. In recognition, culture and creativity are increasingly being embedded within development and regeneration activity across the UK.

The Thames Estuary is arguably already at the forefront of this: from the creative and cultural focus of developments in Stratford, the Royal Docks, Woolwich, Greenwich, Thamesmead, Purfleet and Margate, to the placement of cultural and creativity at the heart of local economic development activities (such as the Mayor of London's Creative Enterprise Zone and Good Growth Fund programmes and Creative Estuary, the Cultural Development Fund programme for the Thames Estuary supported by DCMS).

The Thames Estuary Production Corridor aims to build on these foundations and embed culture and creativity in places across the Estuary: from high streets, to towns, to industrial areas. Supporting creative activities to locate and thrive in these locations will help to differentiate places, strengthen identities, enliven spaces and support the wider economy through increased local spend. The proposition recognises the rich diversity of places, heritage and specialisms which exist across the area, providing an overall framework via which this can be protected, celebrated and enhanced.

The Thames Estuary Production Corridor also provides a response to a broader set of economic, social and infrastructure factors which are constraining the vitality of the Estuary's places and communities. Many of these are long-term structural challenges: action and investment are required now to deliver lasting change for future generations.

Potential	Challenge and Opportunity
Local Productivity	<p>Partly reflecting its diverse economy and industry legacy, much of the Thames Estuary is characterised by comparatively weak productivity levels. This is illustrated by the creative and cultural sector - even though it is growing rapidly and becoming increasingly specialised, the GVA per full time worker in Kent and Essex is c.£10k lower than the England average for the sector. This means that the sector is not currently contributing as much as it could to local and regional economies and is not maximising its potential as a creator of higher value opportunities for local communities.</p> <p><b>Thames Estuary Production Corridor Opportunity:</b> <i>The Thames Estuary Production Corridor aims to enhance local and regional productivity, through the development of a more diverse and embedded creative and cultural economy, and through the strengthening of networks across the area to increase innovation and resilience.</i></p>
Participation and Inclusion	<p>The Estuary is home to a diverse network of places and communities. While overall labour market capacity is strong, there are significant local challenges regarding participation, social mobility and prosperity. The Thames Estuary Growth Commission identifies three types of deprivation in the area: rural deprivation in areas like the Isle of Sheppey, city deprivation within London, and town deprivation in areas such as Tilbury and Basildon.</p> <p><b>Thames Estuary Production Corridor Opportunity:</b> <i>Harnessing and developing talent within the Thames Estuary's communities is an important area of focus for the Thames Estuary Production Corridor. By unlocking growth, it will create significant opportunities both within creative and cultural activities and across the wider economy. These opportunities will be skilled, productive and more resilient. Ensuring wide levels of participation and linking local people to jobs across the Estuary is therefore an important priority.</i></p>
Connectivity	<p>Transport infrastructure supports the flow and exchange of creative workers, products and ideas. While the Estuary enjoys strong strategic connectivity, local links are weaker. Key issues include: challenging rail connections between town centres; marked disparities between the transport accessibility of different clusters that exist across the corridor; projected increases in rail demand across the region; poor strategic transport connections across the Thames, particularly in East London; and strategic north-south highway capacity issues.</p> <p><b>Thames Estuary Production Corridor Opportunity:</b> <i>By developing a stronger and more cohesive economy, and by delivering broader benefits which enhance the attractiveness and vitality of places, the Thames Estuary Production Corridor can help to support making the case for future strategic transport investment including better use of the River Thames, working with Port of London Authority.</i></p>
Digital Connectivity	<p>Fast, robust and future-proof digital infrastructure is a pre-requisite for creative and cultural production. This will increasingly be the case as new avenues of digital technology are developed and enhanced. While the Thames Estuary currently has a strong network, some issues remain. These include: full fibre is not as comprehensive as it could be and may constrain future growth in some areas, especially outside London boroughs and in the rural Estuary; mobile coverage is good but there are areas of poor connectivity in parts of Kent and Essex; digital exclusion is notable.</p> <p><b>Thames Estuary Production Corridor Opportunity:</b> <i>Alongside transport infrastructure, the Thames Estuary Production Corridor will play a crucial role in future to make the case for future digital investment. High quality and future proofed connections should be embedded as a principle across the area: from the scale of the individual development or regeneration scheme, to the strategic approach taken across the region to enhance connections in existing workspaces, homes and public places.</i></p>
Perception and Place	<p>The profile and perceptions of the Thames Estuary and its constituent places has long been a barrier to its growth and progression. While the transformation of places such as Southend, Margate and Stratford is starting to change this, there remain deep and embedded perception challenges which undermine investor appeal and confidence. There is also a lack of awareness about the different locations in the wider Estuary and the opportunities they can provide for business and enterprise.</p> <p><b>Thames Estuary Production Corridor Opportunity:</b> <i>The Thames Estuary Production Corridor will provide a new economic narrative and identity for the Thames Estuary, which will help transform the identity and perception of the region and raise awareness of the opportunities the region provides. Across the UK and the world, creative and cultural activities are increasingly coming to the fore in placemaking. The Estuary's existing assets and future potential in this regard provide a considerable hook: for developers and businesses working locally, up to policy makers working across the region.</i></p>
Strategic Networks and Partnership	<p>The Thames Estuary covers a broad and diverse area: geographically, economically and politically. Each authority has different objectives, priorities and ambitions. While there is a strong track record of local partnership working, there remains a real challenge in establishing the basis and foundations for collective working and delivery across the Estuary as a whole. This is true both in local policy and strategic terms, but also more widely in terms of networks between HE/ FE institutions and creative and cultural institutions and businesses.</p> <p><b>Thames Estuary Production Corridor Opportunity:</b> <i>As a pan-Estuary initiative, the Thames Estuary Production Corridor has already and will continue to strengthen partnership working across the area, uniting under a common brand and set of aspirations. There is already considerable momentum in this regard; the development of the Thames Estuary Production Corridor to date has helped to enhance levels of strategic discussion and collaboration across the area, resulting in new investment such as Creative Estuary, the Cultural Development Fund supported project for the Thames Estuary. This momentum provides a strong platform on which to build.</i></p>



The Thames Estuary  
Production Corridor  
could generate in  
excess of 50,000 jobs:  
doubling the size  
of the Estuary's  
production sector  
and creating the  
largest concentration  
of this activity  
in the UK

# 5. FROM VISION TO ACTION

The Thames Estuary Production Corridor provides the foundations for the next generation of development within the Thames Estuary. Growth will be of national and international significance, recognising the need to do things differently locally and not replicate activities planned elsewhere in the UK.

The cross-boundary partnership is an exemplar of cross-sector governance, demonstrating the effectiveness of cross-boundary partnership working to deliver bold ambitions.

The Thames Estuary Production Corridor was recognised as a key part of the Estuary's future in the Thames Estuary 2050 Growth Commission report, attracting initial investment of £4.6m from the Ministry of Housing, Communities and Local Government (MHCLG) and the Department for Digital, Culture, Media and Sport (DCMS). This confidence from central Government provides a commitment and momentum to build the first phase of delivery. The new Thames Estuary Growth Board and Envoy will now support the delivery of the Thames Estuary Production Corridor, working with Thames Estuary Production Corridor Partners to maximise opportunities for growth.

The delivery approach for the Thames Estuary Production Corridor will build on the significant momentum which has been achieved over the past two years.

Delivery of the whole vision will require collaborative planning across the sub-region, leverage of investment into larger production facilities, ongoing development of clusters and networks, and action to embed culture and creativity as central to inclusive growth and local placemaking.

This section provides an action plan and recommends governance arrangements to be developed over the **next five years**. The Thames Estuary Production Corridor Partners have identified three overarching action areas which will guide delivery activity.

<b>Action Areas</b>	<b>Activity</b>
1. Enabling the Thames Estuary Production Corridor	Estuary-wide action to help to forge the identity of the Thames Estuary Production Corridor, broker collaboration and network development, and provide the foundations for talent development
2. Securing Investment in the Thames Estuary Production Corridor	Coordinating, securing and delivering investment to strengthen strategic and local production clusters
3. Growing the Thames Estuary	Joint working across the Estuary, with the Thames Estuary Growth Board, to secure alignment in plan and policy development, and to foster closer collaboration in lobbying and case making

# Thames Estuary Production Corridor Action Plan

Building on the work undertaken across the past two years, the Thames Estuary Production Corridor Partners have identified an action plan with three overarching action areas which will guide delivery activity.

## **Action Area 1. Enabling the Thames Estuary Production Corridor**

Estuary-wide action to help to forge the identity of the Thames Estuary Production Corridor, broker collaboration and network development, and provide the foundations for talent development. Immediate focus should be placed on:

**1.1** Promoting the Thames Estuary Production Corridor. Example priorities include developing:

- A strong global brand to stimulate inward investment
- A strategic communication campaign
- Exemplary cultural programming to highlight activity across the region
- Thames Estuary Production Corridor champions.

**1.2** Developing pan-Estuary networks across higher and further education, sector representatives and business, to lay the basis for collaboration, policy development and investment. Example priorities include:

- Creating a shared Higher Education and Further Education prospectus with a focus on creative and cultural production activities, working with the 63 providers and the Culture Innovation Forum (South East)
- Encouraging R&D and knowledge exchange within creative clusters
- Improving the quality and diversity of the local talent pipeline
- Publishing an integrated Creative Production Skills Strategy for the Estuary
- Supporting initiatives improving environmental sustainability across the creative production sector.

## **Action Area 2.**

### **Securing Investment in the Thames Estuary Production Corridor**

Coordinating, securing and delivering investment to strengthen strategic and local production clusters. Immediate focus should be placed on:

**2.1** Supporting large-scale cultural and creative production clusters to grow, diversify and extend their reach regionally, nationally and globally. Priorities include:

- Working with partners across the Estuary to identify sites for creative production – across high streets, large-scale industrial locations and regeneration and growth areas
- Development of cross-area masterplans which build cultural and creative production into development plans for sites across the Estuary
- Investing in flagship cultural and creative production projects (Growth Engines)
- Increasing scale and developing specialist facilities within existing clusters.

**2.2** Smaller scale, local creative and cultural projects and networks should be supported to develop production capacity. Priorities include:

- Investing in local masterplan and feasibility studies
- Strengthening local activity to amplify production capacity
- Investing in new production spaces in under-used local buildings on the High Street
- Working with micro and small businesses to help them scale up.

## **Action Area 3.**

### **Growing the Thames Estuary**

**3.1** Joint working across the Estuary, with the Thames Estuary Growth Board, to secure alignment in plan and policy development, and to foster closer collaboration in lobbying and case making:

- Continue to work closely with the Thames Estuary Growth Board and Envoy to maximise their support to the Thames Estuary Production Corridor as a priority for the Thames Estuary Growth Board agenda
- Collaborating across the sub-region to undertake joint master-planning of opportunities and sites
- Working with central government and local partners to secure investment in strategic transport infrastructure. Strengthening the competitiveness of our network of places and production clusters.
- Advocating for the roll out of full fibre and a 5G network across the Estuary. Working with local, regional and government partners to secure prioritised investment.

# In Focus: Delivering a Planning-Led Response

The Thames Estuary Production Corridor provides a regional framework to support the sustainable provision of space for creative and cultural production.

It will help to secure and safeguard new types of workspace and facilities which connect emergent talent to global opportunities, and which meet demand from upriver as well as nurturing it locally.

The scale and specification of future production spaces vary both across and within sectors. The Thames Estuary Production Corridor will support partners to think imaginatively about what new space is required and how the wide range of spaces across the Thames Estuary can be adapted, designed and delivered in order to meet demand.

This will help better define the type of investment made in the built environment as well as contributing to the quality and vibrancy of local places.

## Types of spaces

Cultural and creative production activity is already happening in a diverse mix of spaces across the Estuary, from high street shop units to warehouses on large industrial estates, from re-purposed heritage buildings to adapted office buildings.

Typical Planning Use Classes (Town and Country Planning (Use Classes) Order) which host production activities include: B1B (Research and Development), B1C (Light industrial) and B2 (General industrial). Cultural production is however, varied in its activities and the workspace needs of production businesses and organisations differ across sector and as well as on a project-by-project basis. As such, the following Use Classes are also relevant for certain production activities: A1 (Retail), B8 (Storage and Distribution), D1 (Non-Residential), D2 (Assembly and Leisure) and Sui Generis.

The Thames Estuary Production Corridor will seek to support and deliver, through planning policy and investment, a range of production spaces including:

- Bespoke production facilities (across scales)
- Shared workspaces: from makerspaces,

to co-working to managed, open and shared-access workspaces (to be used by businesses and practitioners across sectors)

- Good quality industrial stock: from large to small-scale, suited to the needs of production businesses along the supply chain
- High street commercial and civic spaces: supporting production activities in more conventional town centre accommodation.

## Places

There is a strong interconnection between production and placemaking.

Creative production facilities can contribute to vibrant and inclusive neighbourhoods, animating spaces and engaging local communities with the sector through visible activity. Ultimately this contributes to vibrancy of places and potentially the commercial impact of development.

The Thames Estuary Production Corridor relates to all places and locations across the Estuary. While some production uses will necessarily be located in industrial areas, many production activities are also well-suited to high street contexts.

The Thames Estuary Production Corridor will seek to make these activities more present and visible across the Estuary's town centres, building on the intersection of these uses with cultural consumption assets that are often located in these areas already, like theatres, galleries and music venues:

- **High Streets and Town Centres:** Regenerating high streets requires more than just enhancing the retail offer or increasing temporary employment. A greater diversity of workspaces and uses can provide a more robust high street economy. It is beneficial to look beyond the retail unit as the only form of workspace provision, and include offices, workshops, galleries and makers' spaces. Some commercial creative practices, such as craft or fashion, will actively seek workspaces that also provide a 'shop-front'. Creative studio workspace

management organisations, who often deliver a supporting program of activities, networks and business support, can significantly benefit the wider high street offer. Additionally, spaces located behind and above the immediate high street, which can often be closely interconnected, offer a great deal of opportunity for novel uses, as opposed to just residential development.

- **Edge-of-Town and Industrial Areas:** Some cultural production is industrial in its spatial requirements, requiring spaces and services that can accommodate the materials, processes, and access requirement that are necessary for large-scale or complex physical works. Additionally, some non-physical cultural production such as film or motion capture for games design also needs industrial scale space for extensive equipment rigs and lighting. These spaces can support onsite production and present opportunities to add interest and value to an area as well as promote neighbourliness.

## Policy fit and response

The Thames Estuary Production Corridor reaches across numerous Local Plans and policy approaches to employment areas, town centres and industrial sites. It will be important for policymakers and planners to work together to ensure aspirations are embedded in and not constrained by policy.

This is not about a one-size-fits-all approach, but about understanding demand, and supporting the case for delivery of new spaces across the Estuary on a place-by-place basis. There is already a strong policy environment to support this. But there are opportunities to pivot and expand upon policy direction with the tangible opportunity provided by the Thames Estuary Production Corridor.

In London, the new **London Plan** sets out strong aspirations (policy HC5) to support London's creative and cultural industries including through the protection of existing spaces and venues and through the delivery of new facilities and capacity. It also reflects a new attitude towards London's Strategic Industrial Locations and Locally Significant Industrial Sites, with the Plan seeking to provide and maintain a sufficient supply of land and premises in different parts of London

to meet current and future demands for industrial and related functions.

The Thames Estuary Production Corridor also encompasses 11 Opportunity Areas across East London (including the Royal Docks Enterprise Zone). These are London's major source of brownfield land which have significant capacity for development and existing or potentially improved public transport access. Some Opportunity Areas will be enabled through Planning Frameworks, which present strategic opportunities to deliver commercial space, housing and key infrastructure (including transport links) which could also support the Thames Estuary Production Corridor.

In Kent, the **Kent and Medway Growth and Infrastructure Framework** (GIF) provides a picture of emerging development and infrastructure requirements for the Thames Estuary Production Corridor to link into and contribute to. The GIF also provides a strategic framework across the county for identifying and prioritising investment across a range of infrastructure, which the Thames Estuary Production Corridor can both benefit from and contribute to.

In Essex, the **Greater Essex Growth and Infrastructure Framework** draws together the planned population, housing and economic growth of Greater Essex. The Framework provides a platform via which local authorities in Essex can collaborate to develop a spatial picture of infrastructure requirement in all areas of the county, identifying the most strategically significant infrastructure projects.

In addition, the Ebbsfleet Development Corporation and Opportunity Areas provide policy frameworks and planning powers which can help deliver key Thames Estuary Production Corridor projects.

Given the nature of the Thames Estuary Production Corridor, there is opportunity for authorities across the Estuary to embed the programme into their Local Plans in place-specific and locally-responsive ways, from employment area designations, to character areas, to transport connections and workspace guidance – all of which can support cultural and creative production activity. Building on the recommendations of the Thames Estuary 2050 Growth Commission, there is also scope for greater collaboration across London, Kent and Essex in terms of infrastructure planning and delivery.

# Governance Recommendations

The scale and breadth of the Thames Estuary Production Corridor opportunity means that governance is one of the key challenges for successful delivery. Given that the Thames Estuary Production Corridor is evolving at a time of economic and political uncertainty, it is important that partners remain flexible and adaptable to change. The arrangements below provide suggested foundations and recommendations upon which future governance can be built.

## Principles for Governance Structures

Governance structures may change, but should always seek to deliver the following functions:

- Clear, visible and mandated leadership of the Thames Estuary Production Corridor
- Ownership of the shared vision and identity for the Thames Estuary Production Corridor
- Coordination of the evolving investment proposition and promotion of the Thames Estuary Production Corridor
- Enhanced advocacy and lobbying to both public and private sector influencers and investors
- Collation and communication of competitor information and best practice insights
- Ongoing use of and updating of the Estuary wide evidence base to inform an evolving business case
- Conceptual development of longer-term projects
- A single point of contact with the support of government for projects that are too large to be taken forward by an individual partner and would realise genuinely transformative outcomes.

## Developing Governance Structures

The governance structure for the Thames Estuary Production Corridor should have a clear scope, purpose and function. The structure needs to focus on the job in hand, not duplicating the activities of local organisations. For the Thames Estuary Production Corridor, this means that new governance structures should focus on strategy and larger projects that provide a step change for unlocking growth across the Estuary, i.e. projects that are too large for a single or small grouping of local authorities, cultural organisations, education institutions and industry bodies to progress and which require a co-ordinated approach from central government.

## Leadership and Strategy: Thames Estuary Production Corridor Board

The Board would have responsibility for providing senior leadership and strategic direction to the Thames Estuary Production Corridor. It would ultimately be the arbiter of strategy and delivery for the wider partnership group, with formal (agreed) decision making responsibility to inform a Programme Partners Board.

The Board should comprise high profile leaders, both from creative and cultural production sectors and local areas, who are champions for the project. The Board should have representation from the Thames Estuary Growth Board, and vice versa, to maintain strategic oversight and influence.

## Delivery: Thames Estuary Production Corridor Programme Partners Board

The Programme Partners Board would take responsibility to develop a programme and action plan for the delivery of the Thames Estuary Production Corridor. This would include cementing links with private sector (investors and developers), the wider sector and government. It would help to ensure

continued alignment with national strategies and local economic policy.

The group should articulate how individual projects contribute to delivering the overarching strategic vision for the Estuary. It would oversee project management, responding specifically to the challenge of ensuring that benefits are distributed across the Thames Estuary.

## Proposed Task Groups

Proposed Task Groups would support collaboration across the Estuary in relation to specific thematic areas of interest. These should be flexible and respond to specific needs and areas of focus. In many cases task groups may be time limited, concentrating upon a specific objective or project for a specific period of time. Coordination across the different task groups would be the responsibility of the Programme Partners Board. Five areas have been identified as being worthy potential task groups subject to further consideration from Partners:

Proposed Task Group	Potential Membership	Potential Projects	Potential Long-Term Opportunities
Identity, Perception and Promotion	London and Partners; Visit Essex; Locate in Kent; GLA; Thames Gateway Kent Partnership and Opportunity South Essex	<ul style="list-style-type: none"> <li>Develop Thames Estuary Production Corridor brand</li> <li>Area protocols and principles for joint marketing</li> <li>Initial market testing and promotion</li> </ul>	<ul style="list-style-type: none"> <li>Development of combined marketing and inward investment agency for the Thames Estuary Production Corridor and the Estuary as a whole</li> </ul>
HE, FE and Education	HE and FE Institutions; GLA; SELEP Skills Commission; Essex Skills and Employment Board; Creative and Cultural Skills; ScreenSkills	<ul style="list-style-type: none"> <li>Further research into current and future business needs</li> <li>Development of integrated skills strategy for the Thames Estuary Production Corridor</li> <li>Oversight of the talent workstream</li> </ul>	<ul style="list-style-type: none"> <li>Joint skills board for the Thames Estuary Production Corridor and the Thames Estuary</li> <li>Establishment of registered provider for creative production apprenticeship</li> </ul>
Culture, Art and Commissioning	South East Creative Economy Network; GLA; Cultural Institutions	<ul style="list-style-type: none"> <li>Sector engagement and coordination</li> <li>Promotion of arts and culture</li> <li>Co-commissioning and placemaking</li> </ul>	<ul style="list-style-type: none"> <li>Centralised commissioning function supporting formal development of supply chain relationships</li> </ul>
Property, Assets and Town Centres	GLA; LLDC; Ebbsfleet Development Corporation; Opportunity South Essex; Thames Gateway Kent Partnership; Developers; Workspace providers (London Providers Board); Creative Land Trust	<ul style="list-style-type: none"> <li>Development of a Thames Estuary Production Corridor high streets and town centres strategy</li> <li>Coordination of emerging projects</li> <li>Mapping and identification of property and assets which could be mobilised to support the Thames Estuary Production Corridor</li> </ul>	<ul style="list-style-type: none"> <li>Independent Thames Estuary Production Corridor property company to manage public sector assets and enable long-term supply of workspace</li> </ul>
Innovation, R&D and Insight	Universities; Innovate UK; Nesta; EIRA; SELEP; LEAP; Digital Catapult	<ul style="list-style-type: none"> <li>Development of R&amp;D network</li> <li>Facilitation of knowledge exchange</li> <li>Development of innovation support and Continuing Professional Development for production companies</li> </ul>	<ul style="list-style-type: none"> <li>More targeted and supportive facilitation of university spin outs</li> <li>Thames Estuary Production Corridor Innovation Agency</li> </ul>



## **Geography**

Currently, the Thames Estuary Production Corridor is made up of 18 core local authority areas; the geography however, should be flexible (see definitions and glossary p. 82) and the option to involve other localities should be considered. Partners from Maidstone, Ashford and Colchester have already been engaged on the basis of the scale of existing projects and their ambition in these areas and others. They may wish to engage with the project in the future and their ambition to deliver further creative and cultural production projects.

In deciding whether other areas could join the evolving Thames Estuary Production Corridor partnership, partners can consider whether these places satisfy the majority of the following suggested criteria:

- A strong or rapidly growing Creative and Cultural Production sector
- Significant creative and cultural production facilities or significant projects within their pipeline
- A boundary that touches the core area
- A strong pipeline of local 'spark' projects which support participation, identity and engagement
- A commitment to working collaboratively, sharing information and insight with Production Corridor partners
- A commitment towards contributing to the delivery of priority actions
- Ultimately, this decision will be made via the Thames Estuary Production Corridor Board and Programme Partners Board

## **Staff Resource**

The governance structures recommended above are not currently resourced. The ongoing development and delivery of the Thames Estuary Production Corridor project will require additional and dedicated officer resource. This could include:

- Senior leadership, with a Project Director to oversee the project

- Project management in London, Essex and Kent, with officers reporting to the Project Director. Managing collaboration and supporting practical activities such as marketing, promotion of sites and monitoring Local Spark projects
- Theme-lead officers seconded into the Thames Estuary Production Corridor delivery to manage specific workstreams
- Named Thames Estuary Production Corridor officer representation linked to specific education, housing, digital skills, regeneration, planning and transport infrastructure projects, ensuring representation of creative and cultural production in future decisions and case making

## **Evolution**

Retaining an open mind over the evolution of governance structures and project delivery arrangements will be important. In some cases, partners could look to 'spin-out' arm's length delivery entities. The most prescient early example of this is the potential to build upon the early experience of London's Creative Land Trust to pool assets to support creative production.



# Building the Case for Investment and Funding

The Thames Estuary Production Corridor is evolving; the case for certain elements of the project is already being made, whilst other areas of projects are less developed. The commitment of £4.6m from government acts as a stimulus and reassurance to early-stage private sector investors that the Thames Estuary Production Corridor is a serious, long-term endeavor of international significance.

The development and future acknowledgement of the Thames Estuary Production Corridor brand will provide the confirmation that an investment is part of a bigger placemaking initiative rather than an isolated project. If this can be embedded, then the Thames Estuary Production Corridor itself can also form the fulcrum of the case for investment in other parts of the Thames Estuary, forming a narrative which can animate the bids and development proposals, as well as business cases for transport, housing and digital and skills investments.

It is important for the Thames Estuary Production Corridor partners to not just seek funding for delivery of specific projects, but to present an evolving investment proposition to both public and private partners. The Thames Estuary Production Corridor is a portfolio of investments which will require partners to consider the relative potential returns and, in some cases, take risks in funding and prioritising projects.

## **Securing Investment for the Thames Estuary Production Corridor Growth Engines**

The Thames Estuary Production Corridor Growth Engines which have been identified within this report will be the tangible realisation of the long-term strategy. These will be delivered by securing private sector investment based on a strong market proposition. This may be secured through a strong commitment from industry partners, in other cases (such as the Royal Docks) it may be delivered and enabled by and as part of major development.

To achieve this, developers and investors will need adopt the language and objectives of the Thames Estuary Production Corridor.

This should not be seen as a zero-sum game; the Thames Estuary Production Corridor is a value generator which can help root and promote development whether residential or commercial. The precedent for this is already in place at developments such as City Island (Newham), Silvertown Quays (Royal Docks) and Design District (Greenwich), where developers and investors have placed creative production at the heart of their placemaking vision and value proposition.

The actions outlined within the 2050 Growth Commission report and the new Thames Estuary Growth Board's action plan, will contribute to the viability and delivery of these projects; building local capacity to accommodate them as well as linking them to their markets, workforce and each other. To this end, it is important that Thames Estuary Production Corridor partners maintain regular dialogue with partners planning infrastructure and ensure that the project is referenced wherever possible.

Again, the Thames Estuary Production Corridor concept provides a potential differentiating factor in the Strategic and Economic case made to government and investors who may fund enabling infrastructure. International examples of creative production and innovation corridors have successfully built the case for infrastructure and partnership around these concepts, through a more agile and imaginative approaches to developing and communicating business cases (see Annexe 3).

## **Developing the Mechanisms to Enable Investment**

The Thames Estuary Production Corridor, already has two development corporations (London Legacy and Ebbsfleet), whilst the Royal Docks Delivery Team holds similar powers and responsibilities. These bodies exist to make it easier to invest in specific locations, as such, they provide valuable insight and good practices which can be scaled to a regional level. Partners could also consider co-ordinating promotion, master-planning and other strategic functions to enable the Thames Estuary

Production Corridor to evolve as a genuinely impactful industrial strategy.

The emerging commitment to better use publicly owned land and assets to support the delivery of more diverse spaces for creative production should also be seen as a means to enable greater private investment. The emergence of the Creative Land Trust in London will be an important first step in delivering this, acting as a trailblazer for new ways of investing.

The expectation should be that in return for making it easier to invest and deliver projects, developers and investors embrace the objectives and initiatives set out within this document. Through formalised governance, private sector funders should be supported to establish strong regional networks as a foundation for collaboration and project development.

## Funding New Actions and Interventions

The commitment from government to support the project through DCMS' Cultural Development Fund and investment from MHCLG is vital for the credibility of the Thames Estuary Production Corridor. This is complemented by unprecedented investment from the Mayor of London in projects as part of his Cultural Infrastructure Plan such as East Bank, the Creative Land Trust and Creative Enterprise Zones in Lewisham and Hackney Wick and Fish Island.

The areas identified for action will in the short term be delivered through a mix of enhanced partnerships, new funding and better use of available resources.

- **Identity** interventions will require public sector investment in the short term to support the initial coordination and communication. This could be achieved through stronger coordination and the flexing of existing resources, but is likely to require some new investment to achieve the impact required to stimulate other activities. In the medium and long-term, private sector brand adoption and contribution will reduce the need for public investment.
- The Thames Estuary's **Spaces and Places** will evolve through a blending of public and private investment and resource contribution. In some cases, this will be

through a genuine investment in a space or location, in others, the initial stimulus could be through the vesting of an asset to enable cultural production (particularly in town centre locations). Planning mechanisms such as Section 106 and Community Infrastructure Levy could also help to stimulate the provision of enhanced cultural production spaces and digital infrastructure – an area of innovation and prototyping already being activated within the Thames Estuary, which could be further supported through joint spatial planning.

- For interventions focused on **talent** to be meaningful and joined up, there is a genuine need for public investment. This will need to be accompanied by consistent and long-term in-kind commitments from education and business support practitioners.

The long-term commitment required to deliver the Thames Estuary Production Corridor project will need agile public investment. To achieve this, Estuary Partners need to secure a suitable deal with government departments to enable integrated skills and innovation interventions as well as more general commitments to housing and infrastructure.

In due course, where it can be delivered efficiently, the establishment of independent or semi-independent bodies to support delivery of enabling projects may offer a route to enhanced investment. This could for instance, be in the form of the development trusts to enable transfer of public sector assets or new training and apprenticeship provider companies to realise economies of scale in delivering talent and innovation projects.

# What's Next?

The Thames Estuary Production Corridor Partners Board is responsible for the vision and delivery strategy, leading on identity and network development, and coordinating cross area masterplanning and feasibility work to stimulate new production investment.

To achieve its potential, the Thames Estuary Production Corridor will require ongoing collaboration, innovation and commitment from all partners.

## Call to Action

### **London Economic Action Partnership, Greater London Authority and South East Local Enterprise Partnership**

Allocate resources to support delivery of pan-Estuary projects developing the Thames Estuary Production Corridor with cultural infrastructure and skills opportunities; positioning the Thames Estuary Production Corridor at the heart of economic and social strategy; consistent messaging to support a coherent identity

### **Central government**

Funding to support the delivery of the Thames Estuary Production Corridor; active participation in governance and advocacy; promotion to international inward investor markets; investment in digital infrastructure; commitment to enhanced transport; investment in town centres to facilitate an enhanced role for creative production on the high street

### **Higher and further education institutions**

Commitment to working collaboratively with sector partners across Estuary; providing greater access to facilities to boost innovation and collaboration; supporting the development of new learning opportunities to build the creative workforce

### **Sector and cluster representatives and businesses**

Collaboration in local and pan-Estuary networks; using networks and connections to help build and project common messaging regarding local creative strengths and opportunity

### **Developers and investors**

Advocacy of the vision; openness to testing new ideas and ways of working; integration of specialist cultural production facilities in new developments; leverage of connections and specialist expertise

### **Local government**

Supporting the vision within strategic policy; leading on spatial masterplanning, strategy development and allocating resources to support the development of local production clusters

## Next Steps – 2020 to 2022

- Appoint a Thames Estuary Production Corridor project lead
- Support the appointment of a Thames Estuary Production Corridor Champion on the Thames Estuary Growth Board and continue to work closely with the Growth Board and Envoy to maximise their support to the Thames Estuary Production Corridor
- Commission feasibility studies to support and strengthen cultural and creative production in the Estuary
- Identify new sites for cultural and creative production to develop a projects pipeline across high streets, industrial locations and regeneration and growth areas
- Support research in skills to understand current and future business needs and improve the quality and diversity of the local talent pipeline
- Build and promote a strong Thames Estuary Production Corridor brand and identity to grow the partnership and stimulate investment
- Develop a formalised governance structure involving representatives and businesses from the cultural and creative sectors, higher and further education institutions, developers and investors, local authorities across the Estuary and central government.

## Get in Touch

For more information or to find out how you can get involved, please contact:

The Greater London Authority Culture Team: [culturalinfrastructureteam@london.gov.uk](mailto:culturalinfrastructureteam@london.gov.uk)

The South East Creative Economy Network: [hello@southeastlep.com](mailto:hello@southeastlep.com)



# Annexe 1. Action Plan: Potential Projects

This is a long list of projects that could be delivered to meet the Thames Estuary Production Corridor goals.

## Action Area 1. Enabling the Thames Estuary Production Corridor

Project	Description	Potential delivery activity and ask for consideration by Partners
Thames Estuary Production Promotion	<p>Development of pan-Estuary branding to empower places to put creative and cultural production at the heart of their external inward investment and visitor offer.</p> <p>Embedding a stronger, more consistent focus on creative and cultural production into the inward investment and promotional offer of the Thames Estuary and its places.</p>	<p><b>Project:</b> Cross-sector commissioning through new partnerships between creative and cultural practitioners, London and Partners, Locate in Kent, Opportunity South Essex, Visit Kent and Visit Essex.</p> <p><b>Ask:</b> Enhanced support from DIT to promote the Thames Estuary Production Corridor around the world.</p>
Pan Estuary Co-Commissioning	<p>A new Pan Estuary Co-Commissioning Programme to encourage a greater degree of collaboration across the Estuary, increasing the quality, diversity and visibility of production activities, ultimately building the identity of the Thames Estuary Production Corridor.</p> <p>Providing support to high quality grassroots creative and cultural production activity (including the evolving list of Local Sparks) through enhanced digital engagement and programming.</p>	<p><b>Project:</b> A stronger, more visible role for the creative and cultural sectors in the Estuary, linking practitioners to a wide range of projects and decisions.</p> <p><b>Ask:</b> Open-minded approach to the role of culture and creativity from all partners.</p> <p><b>Ask:</b> Provision of and access to spaces for culture and creativity across the Estuary.</p>
HE / FE Prospectus	<p>Development of a new prospectus which collates and articulates the HE and FE strengths of the Thames Estuary. A focus upon teaching and research with direct links to creative and cultural production activities. The prospectus will help to demonstrate to external partners and investors the scale of creative and cultural expertise which exists across the Estuary. It would provide an initial stimulus for new and more proactive collaboration between the institutions and help to bind the network together as a globally significant cluster.</p>	<p><b>Project:</b> Agreement between institutions to work together in developing new commitments and processes.</p> <p><b>Ask:</b> Support from BEIS, Creative and Cultural Skills, Creative Industries Federation, Nesta and Policy and Evidence Centre to support curriculum development and a shared innovation policy.</p> <p><b>Ask:</b> Mandate and funding to prototype the development of new courses and methods of teaching across the Estuary.</p>

Project	Description	Potential delivery activity and ask for consideration by Partners
Production Leaders	<p>Development of new Creative Production Curriculum as a precursor to a new Integrated Skills Strategy for the Estuary.</p> <p>Work with Creative Industry bodies and business representation to enable a new model of Creative Apprenticeships targeting future sector leaders aged 15-24 years, de-risking participation amongst businesses and providing new vocational experiences and career paths.</p> <p>Pro-actively recruit in the most disengaged and disadvantaged areas, developing create-tech skills, increasing confidence, engage with underrepresented groups and breaking down barriers to employment through a coordinated programme of mentoring and internship opportunities to encourage participation.</p>	<p><b>Project:</b> New partnerships with HE and FE providers, creative freelancers, SMEs, and skills agencies and young people themselves.</p> <p><b>Project:</b> Initial piloting through CDF fund to develop programme in Essex and Kent.</p> <p><b>Project:</b> Partners and Authorities to map routes to most deprived communities and long-term barriers to engagement.</p> <p><b>Project:</b> Businesses and Leader's to provide experience opportunities as part of the Creative Production T-Level offer in the Thames Estuary Production Corridor.</p> <p><b>Ask:</b> Investment to support London to match CDF commitment to Production Leader's pilot.</p> <p><b>Ask:</b> Scope development of a National Skills Academy model for creative production skills rolled out across the gateway.</p> <p><b>Ask:</b> Enhanced participation of local schools and education authorities to support curriculum roll out.</p>
Production Labs and Testbeds	<p>New collaboration between universities and business across the Estuary to enable business-led innovation and knowledge exchange with a focus on linking creative and cultural production with new technology and thinking.</p> <p>Bring together entrepreneurs, technologists, academics and leading professionals from a range of sectors to ensure that future technology and societal need is embedded within the thinking practice of our production sector.</p>	<p><b>Project:</b> New links established through CDF between SECCADS – South East Creative, Cultural and Digital Support programme and EI:RA (Enabling Innovation: Research to Application) to embed inter-company innovation in the sector's businesses.</p> <p><b>Project:</b> Linking major new workspace and production investments to HE and knowledge exchange.</p> <p><b>Project:</b> Making public sector and education assets available to host Labs and test beds.</p> <p><b>Asks:</b> Investment and research in monitoring and reflecting upon activity through collaboration and development within Labs.</p>
Scale Up	<p>A pan-Estuary project focusing on supporting freelancers, start-ups and small businesses, with a focus on unlocking latent potential by encouraging growth and scaling up of activity. Connect businesses to supply chain opportunities, with a focus on improving links to the large-scale creative and cultural consumption sector which exists in London and across the Estuary.</p>	<p><b>Project:</b> Further mapping and understanding of the regional freelancer community and their needs.</p> <p><b>Project:</b> Development of new platforms (built from the foundation of the SECCADS project) to help freelancers and businesses across the Estuary, and across sectors, connect and collaborate. In the first instance, a series of Sector Summits (funded through CDF) to achieve this.</p> <p><b>Ask:</b> Commitment from larger cultural operators to participate in dialogue and partnership with small and freelancer businesses.</p>

## Action Area 2. Securing Investment in the Thames Estuary Production Corridor

Project	Description	Potential delivery activity and ask for consideration by Partners
Investment mapping and pipeline development	<p>Work across the Estuary to map, develop a project pipeline, demonstrate the economic return on investment and broker creative and cultural production investment opportunities. Link sector representatives, developers, and councils to secure a pipeline of new production facilities for the Estuary: from stand alone, large scale production anchors to smaller scale facilities embedded within wider regeneration projects (such as at Thamesmead or Purfleet) and particularly the Enterprise Zones (Royal Docks and North Kent).</p>	<p><b>Project:</b> Improved dialogue between Production Corridor authorities, developers and the sector.  <b>Project:</b> Sharing of good practice (Planning and Design Guidance) between London and Kent and Essex partners.  <b>Ask:</b> Collective case making to support investor and developer engagement in the delivery of new spaces.  <b>Ask:</b> Enhanced public sector investment to de-risk initial delivery of creative and cultural production spaces.</p>
Production on the High Street	<p>Embed creative and cultural production (through production test-space or open access workspace) on high streets and town centres across the Estuary, making the Thames Estuary Production Corridor concept visible and accessible.            In the shorter term, this could take the form of a rolling programme using temporary spaces from one town, to the next to develop and test the concept and the model.</p>	<p><b>Project:</b> Explore options for delivering more creative production on High Streets (e.g. starting with the delivery of a pilot project in Margate led by Margate School with funding from the Coastal Communities Fund).  <b>Project:</b> Roll out of initial projects in line with the Cultural Development Fund delivery.  <b>Ask:</b> For partners and wider stakeholders to incorporate production opportunities into funding applications to improve and support local High Streets  <b>Ask:</b> Sector commitment to curate spaces.</p>
Open Assets for Production and Innovation	<p>Develop a collective, strategic model to identify and pool local authority and HE / FE assets to provide space for Creative and Cultural Production.            Place prominent vacant and underused urban buildings into a single meanwhile vehicle to deliver 'new' space at an unprecedented scale of geography and coordination (under the Thames Estuary Production Corridor banner).</p>	<p><b>Project:</b> Local Authorities will identify potential assets which could be pooled.  <b>Project:</b> Share the experience of London partners through the new Creative Land Trust.  <b>Ask:</b> Broader inclusion of public sector partners and assets.  <b>Ask:</b> Pump-prime funding to maximise the scale of asset 'vehicle' and de-risk early stages of the project.</p>
Planning for Production	<p>Establish a pan-Estuary forum to inform the development of planning policy and information relating to the Thames Estuary Production Corridor.            Initial focus upon sharing information on the purpose of the Thames Estuary Production Corridor and its implications in terms of use of space across the Estuary, providing the basis for planners to support each other to establish strong policies that encourage the promotion of creative and cultural space.</p>	<p><b>Project:</b> Involvement of 18 Planning Authorities, GLA and County Councils.  <b>Project:</b> Sharing of learning from the GLA's CEZ programme.  <b>Project:</b> collaborative working is also needed to develop a common understanding of the types of spaces which are appropriate within policy designations.  <b>Ask:</b> Support to deliver masterplans for creative production on key sites.  <b>Ask:</b> Long-term support to address constraints on large potential production sites.</p>

### Action Area 3. Growing the Thames Estuary

Project	Description	Potential delivery activity and ask for consideration by Partners
Digital Highway	<p>Deliver transformative enhancements to digital infrastructure and connectivity, helping the Estuary to develop as a Gigabit region. Enable the roll out of full fibre across the Estuary and the development of a 5G network which provides genuinely world-class connections which transcend physical boundaries.</p> <p>Accompany infrastructure delivery with a programme to commercialise new knowledge developed in Production Corridor University (Augmented Reality at Goldsmiths; Gaming at University of Greenwich etc).</p>	<p><b>Project:</b> Continued collaboration between London LEAP, SELEP, and Essex and Kent County Councils, to make the case for investment.</p> <p><b>Project:</b> Development of new collaborations between local authorities and HE leaders, piloted through the Lewisham North CEZ.</p> <p><b>Ask:</b> Appropriate scale of government and private investment to support ultrafast broadband and 5G roll out across the Estuary.</p>

# Annexe 2. Suggested Measures of Progress

Example measures of progress for the Thames Estuary Production Corridor action plan could include:

- Attraction of inward investment to the Estuary
- Investment secured from strategic bodies and Government
- Benchmark position against comparator regions (range of indicators)
- Partnership working and 'visibility' of the Estuary
- Number and diversity of creative and cultural facilities
- Number of creative and cultural jobs and businesses supported within local clusters
- Investment in creative, cultural and supporting infrastructure
- Networks between production facilities and places
- Number of Estuary residents employed in creative and cultural jobs in the Estuary
- Knowledge Exchange – HE, Private and Public Sector
- Participation among most disadvantaged groups
- Levels of diversity in the creative workforce, based on protected characteristics
- Local start up and enterprise rates
- Number of freelancers and businesses engaging and collaborating
- Business scale up rates
- Supply chain links with major consumption institutions

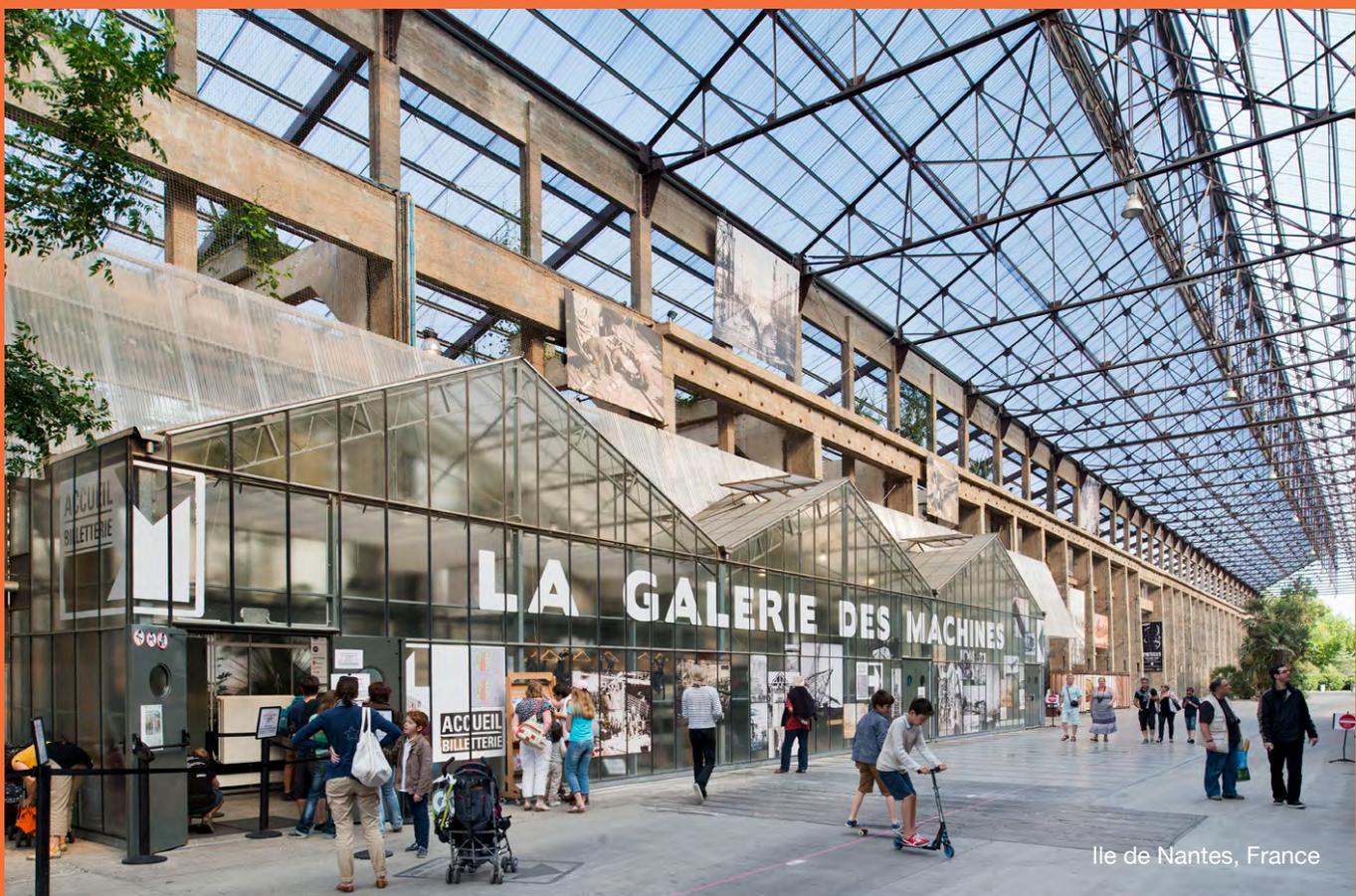


## Annexe 3. Learning from Elsewhere: Positioning the Region Globally

For the Thames Estuary to be globally competitive and deliver on its potential national impact, it needs to learn from other places that offer both inspiration and competition. There are several places that have been considered in developing this strategy including both those which have delivered whole region and site-specific approaches. Each of these has direct relevance to an aspect or aspects of future Thames Estuary Production Corridor delivery.

The experience of **Ile de Nantes** shows the importance of long-term planning and understanding the relationship between cultural spectacle and the credibility of the investment offer. The role of the public sector has been critical in stimulating the opportunity and providing confidence for investors. The extent of the educational offer also creates greater capacity to develop knowledge and innovation based production.

**Shenzhen Maker City** has seen rapid regional innovation growth through scaling of the maker economy. The difference in context should be noted, in particular the incentives and freedoms enabled by Shenzhen's status as a Special Economic Zone. That said, with Enterprise Zones in Royal Docks and the North Kent Coast, promotion of incentives and development of wrap around support will be important to the Thames Estuary Production Corridor. Again, scale is important, as is knowledge exchange: Shenzhen already has partnerships with San Francisco and there may be potential to develop similar relationships as developer ABP at the Royal Docks looks to directly support Chinese businesses to locate in the Estuary.



Ile de Nantes, France



Shenzhen Maker City, China

Similar in scale to the Estuary is the **Toronto – Waterloo Innovation Corridor**. This is notable for the leadership shown by universities, underpinned by strong digital connectivity, built on a case for collaboration. In the partnership between places, no location has pre-eminence and it is noted that all places contribute to the offer. Toronto – Waterloo is not a creative production corridor, but it does show that a coherent offer can be articulated over a larger area, with multiple metropolitan hubs.

In terms of site-specific projects, **Hilversum Media Park** east of Amsterdam is perhaps the most significant in Europe, employing 6,000 people in creative production. Hilversum succeeds on the foundation of strong public/private partnerships and flexible balanced offer - as well a commercial space, it is a tourist attraction, learning and innovation space. As development comes forward in Thurrock, Ebbsfleet, Dagenham and Ashford, Hilversum should be noted as inspiration, but also competition for footloose foreign investment.

**Subtopia** in Stockholm is a 15,000sqm production hub. Its peripheral location is sold as a strength, as is its connection with its local community. Although this is not necessarily a competitor for the Thames Estuary, it illustrates the potential social and placemaking value of creative production.

Similarly, **Colorado's Space to Create** (much like the Creative Land Trust, supported by the Mayor of London) recognises the importance of providing long-term security of space for creative production. It is unique however, in its aim to support this activity as part of long term placemaking in isolated and deprived locations through significant capital investment. As the Thames Estuary's town centres respond to emerging economic challenges, the experience of Space to Create provides a vital precedent to making the case for investment.

# Definitions and Glossary

- The Thames Estuary: there is no red line boundary of the Thames Estuary Production Corridor; it broadly takes in the area surrounding the Thames Estuary in East London, North Kent Coast and South Essex. However, for the purposes of statistical analysis, a 'core' Thames Estuary Production Corridor has been defined, covering 18 local authority areas that 'touch' the Estuary:
  - East London: Lewisham, Bexley, Tower Hamlets, Newham, Barking and Dagenham, Havering and Greenwich
  - North Kent: Dartford, Gravesham, Medway, Swale, Canterbury and Thanet
  - South Essex: Thurrock, Castle Point, Southend, Rochford and Basildon.
- Creative and cultural industries: those industries which have their origin in individual creativity, skill and talent which have a potential for wealth and job creation through the generation and exploitation of intellectual property.
- Creative and Cultural Production, Consumption and Supply Chain Activities: the creative and cultural industries cover a diverse set of activities and have relevance across the economy. The industries involve a cycle of production, consumption and distribution activities and use intellectual and creative capital as their primary input:
  - Creative and cultural production: activities relating to the making of work
  - Creative and cultural consumption: the purchase or consumption of creative and cultural activities by buyers, consumers or audiences
  - Creative and cultural supply chains: sectors which provide materials, services and skills to production and consumption activities.
- Growth Engines: Larger scale initiatives which have the potential to be transformational in supporting the development of the sector
- Local Sparks: Smaller scale projects supporting the development of creative, cultural and production activities in the Estuary's places.
- The Thames Estuary 2050 Growth Commission: an independent Commission established by government in March 2016 to develop an ambitious vision and delivery plan for North Kent, South Essex and East London up to 2050. The Commission's report was published in Summer 2018, and government published their response to this in Spring 2019, pledging support for the Thames Estuary 2050 Growth Commission's vision to create 1.3 million new jobs in the area by 2050.
- The Thames Estuary Growth Board: The Thames Estuary Growth Board was established in 2019 by government to oversee and drive economic growth plans in the area. It is chaired by the Estuary Envoy. It launched its first action plan in July 2020.

## Technical Terms

- Location quotient: a measure of the relative concentration of economic activity in a certain place or sector. A measure of above one indicates a higher concentration than is average across a defined wider area, and a measure of below one indicates a lower than average concentration.
- Gross Value Added (GVA): the standard measure of local economic output. It is a measure of the value of goods and services produced in an area, industry or sector of an economy.
- Productivity (and GVA per FTE): a measure of the efficiency of production within an economy; this is typically measure in terms of the total economic output (GVA) generated per full time equivalent job (FTE).

## Abbreviations

- BEIS – Department for Business, Energy and Industrial Strategy
- CDF – Cultural Development Fund
- CEZ – Creative Enterprise Zone
- DCMS – Department for Digital, Culture, Media and Sport
- FTE – Full time equivalent employee
- GLA – Greater London Authority
- GVA – Gross Value Added
- HE and FE – higher and further education
- LEAP – London Economic Action Partnership
- MHCLG – Ministry of Housing, Communities, and Local Government
- NVQ1-4 – National Vocational Qualification (Levels 1 to 4)
- SECCADS – South East Creative, Cultural and Digital Support programme
- SECEN – South East Creative Economy Network
- SELEP – South East Local Enterprise Partnership
- SMEs – Small and Medium Sized Enterprises (typically defined as having fewer than 250 employees)
- 4G and 5G – fourth and fifth generation mobile and wireless technology

