

Discussion Paper

Growth through Skills: Lessons from the
Thames Estuary Production Corridor

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Executive Summary

Previous research conducted by the Creative Industries Policy and Evidence Centre (PEC) has highlighted significant challenges for the UK skills system to overcome, not least around ensuring a highly skilled creative workforce for the future¹. In the context of the Industrial Strategy of 2017, and the Government supporting more local and sectoral customisation of policies to enhance outcomes, and strengthen the local institutional infrastructure, we were interested in learning lessons around locally driven skills investments and initiatives.

Given that the PEC aims to use its research to help develop practical skills solutions, this project has presented an opportunity to better understand how some of these critical skills challenges identified for the Creative Industries are playing out locally and what can be done to resolve them. A core aim has therefore been to understand the practical realities, opportunities and threats, of seeking to enhance the responsiveness of the skills system in a local area and bring local implementation to life – in this case seeking to meet the industry needs of creative regional clusters. The focus on the Thames Estuary reflects the fact that the Creative Industries has been identified as a priority sector in the region and therefore offers distinct lessons for wider areas. The intention has thus been to use the Thames Estuary to provide practical insights and shape 'roadmaps' to future action elsewhere.

Introduction

Over the past decade, UK creative production has boomed, fuelled by generous tax credits, strong consumer spending and growing global demand. But, as demand for labour has surged, the pipeline of talent to the sector has failed to keep pace. There now exist significant skill deficiencies, and growing concerns that the skills system is failing to anticipate and deliver the skills Creative Industries need. In the context of Covid-19, this has created much economic uncertainty. This project from the Creative Industries Policy and Evidence Centre (PEC) provides an opportunity to explore skills investments targeted at the Creative Economy in a local area. As such, it *aims to act as a case study to enhance understanding about the realities, opportunities and challenges of driving future growth within regional creative clusters through skills.*

It has been conducted in the Thames Estuary, to learn lessons from the delivery of skills programmes, which are already being customised to the needs of

the local economy and hence local creative employers. Its intention has been to identify and share best practice, drawing lessons from what others have practically tried, as a basis for wider learning.

The Thames Estuary Production Corridor (TEPC) Vision² represents a considerable opportunity, capitalising on the area's creative assets, rich cultural and economic heritage, strong established networks, and specialist expertise, and backed by the Government's Cultural Development Fund. The Vision is driving forward an ambitious programme, centred around 30 creative sites. Its goal is to enhance investment and customise action to better meet the needs of local Creative Industries and provide a supportive infrastructure locally. In essence, this is bringing together, and co-ordinating multiple funding and policy tools, covering planning, innovation, business development and enterprise, and most crucially for this study, skills. As part of the

¹ For example, Carey et al (2019) Skills, Talent and Diversity in the Creative Industries: Evidence synthesis and scoping report

² [TEPC VISION.pdf \(southeastlep.com\)](#)

wider strategy for the Thames Estuary³, it has the potential to position the Estuary over the next 30 years as a world-class centre for creative production, creating employment and skills opportunities and driving inclusive growth.

What we have done?

The work programme for the TEPC research study has involved a mixed methodology including: desk based research, reviewing the existing evidence on the TEPC; qualitative interviews with a broad range of stakeholders within and outside the region (around 40 interviews primarily within local authorities, LEPs, businesses, and a range of education providers); and quantitative analysis of local labour market information (LMI), capturing employment composition and engagement in different parts of the skills system. The research has been structured around three main stages. These have aimed: to explore the rationale for the TEPC Vision; understand the nature and distinctiveness of the local skills system, and how it can better support the needs of the Creative Economy needs; and draw lessons to shape skills improvements, identifying priorities in future for more effective local skills action.

Figure: Project goals



Rationale for the TEPC Vision

The research sought to understand *the motivation for a dedicated Creative Industries' Strategy in the region* by examining the nature of the Creative Industries footprint within the Thames Estuary economy, and in turn *how this has shaped the TEPC Vision*.

The Thames Estuary has had a relatively strong labour market in recent times, which has provided important foundations for developing the creative economy. Prior to the pandemic, economic activity rates in nearly all local authority areas were close to or higher than the national average (79%). Although there are parts of the Estuary in the top 30% most

deprived areas nationally, overall, the region presented a highly viable workforce.

The Creative Industries has been a success story nationally. Over the last decade, it grew faster than the economy as a whole, in employment as well as economic terms - this offered much potential for the Estuary too. The size of *the Creative Industries sector was on a par with the national position, with a total share at around 6% of the local economy, and it had also exhibited significant recent growth* – that is, business growth +27% and employment +11%.

Several sub-sectors, in particular, had demonstrated a significant presence in the region and hence offered much potential for future growth, including the *IT, Software & Computer Services subsector* - by far the largest and most specialised in the Estuary - *Film, TV, Video, Radio & Photography; Architecture; Advertising & Marketing; Music, performing and visual arts; Design; and Museums, libraries & galleries*.

The TEPC Vision has aimed to build on local creative assets and to unlock *long term, transformational, culture-led improvements* across East London, North Kent, and South Essex. First led by the Mayor of London and the London Economic Action Partnership (LEAP), the South East Local Enterprise Partnership (South East LEP) and the South East Creative Economy Network (SECEN), the Thames Estuary Partnership has sought to bring together and amplify the work of wider local partners: such as Kent and Essex County Councils; and 18 local authority areas. The Vision has drawn on national⁴ and international best practice⁵ to understand what factors *shape the local infrastructure to create the best conditions for success in driving growth in creative regional clusters*. Crucially, this has included a focus on skills and getting the skills systems right. The success factors have been summarised into five core areas:

- 1. A long-term shared vision** – driving an ambitious programme of investments, centred around 30 creative sites, inspired by research and good practice, nationally and internationally.
- 2. An asset-based approach** - supported through smart specialisation⁶, building on local heritage, past regional & sector strengths, and customs & practices. This reflected evidence that successful clusters are emergent and not created.⁷
- 3. A cross-cutting & multi-dimensional framework** - unlocking multiple, tiered investments and policy tools, *customised sub-regionally* and *sub-sectorally*. This recognised that there is no short-term silver bullet and that multiple actions are required over time to optimise how and where

³ Thames Estuary 2050 Growth Commission report - GOV.UK (www.gov.uk)

⁴ Nesta (2018) Creative Nation.

⁵ Thames Estuary Production Corridor: [Case for Investment](#), Hatch Regeneris, We Made That, & Tom Fleming Creative Consultancy

⁶ European Commission. 'What is Smart Specialisation?'

⁷ Brookings Institution (2017) Clusters and Innovation Districts: Lessons from the United States Experience.

tailored services can be provided. But, crucially, this has required local autonomy, and hence, the space to direct funding to develop local objectives and initiatives.

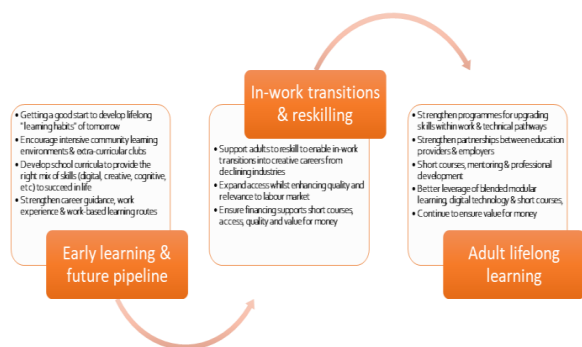
4. **Multi-stakeholder partnerships** – recognising that the local infrastructure will work best when it supports “grass roots” collaboration and co-creation. By co-ordinating the expertise of skills interest groups across the region, this complements and adds value to distinct sub-regional activities, such as in individual local authorities. The pooling of resources amplifies the effects to create a greater sum of parts.
5. **Sector-specific programmes** – effective local customisation will need to draw upon a range of *sector-specific projects*. These include a blend of sub-regional activities supplemented with, dedicated Estuary-wide projects too, to meet the distinct industry needs of the business community in the whole region.

The distinctiveness of the creative skills system

The research examined the post-16 education and skills system within the Estuary to understand the distinctiveness of the creative skills offer and regional creative specialisms, contributing to the TEPC and hence needs of the Creative Industries locally.

Whilst there was not a dedicated pan-Estuary skills strategy for the creative economy at the time of the study, by drawing on the separate skills strategies locally, high-level objectives were evident. The overriding goal was to create a more *responsive, and employer-led creative education and skills infrastructure* for the region in future.

Figure: Strategic skills objectives for the Estuary



Three strategic objectives were identified, to:

- **enhance entry opportunities** for young people and the future talent pipeline;
- **encourage in-work transitions** into the sector, widening access and the diversity of the future creative workforce; and
- **support lifelong learning and progression** routes for adults within the sector.

In working to meet these objectives, the local skills system has evolved some important core features to optimise delivery:

1. **A recognised baseline infrastructure** in *post-16 creative education* operating across the region, providing vital steps largely via mainstream further and higher education programmes into work – largely nationally designed and locally supported;
2. **Established education routes** – these can be summarised into two broad areas captured by *academic routes* on to university, and *technical routes* on to further study but through traditional Applied General Qualifications rather than Apprenticeships;
3. **An experienced local skills ecosystem**, supporting greater specialism in a range of local skills institutions, including a network of around 120 post-16 schools, 50 further education colleges, 13 universities and 30 independent training providers – clearly, vital to customisation and partnership working;
4. **A network of specialist creative centres of excellence**, which have been vital in building the depth of creative specialist knowledge locally, and presenting the potential to extend the future scale and reach of the skills offer. Some are *nationally driven & publicly funded* (eg University Technical Colleges, National Colleges for the Creative Industries; and Institutes of Technology). Some are *internationally renowned Creative Institutions* such as: The University for the Creative Arts; Ravensbourne; and the University of the Arts London. Others are *industry recognised* (eg ScreenSkills Select; the BFI Film Academy; and the ACE Education Programme).
5. **Customised sector-specific skills programmes** have added distinct, specialist value to the baseline offer. These have been enabled by regional and sectoral funding, combined with industry expertise locally. They have provided a vital basis to build policy continuity over time around local priorities (eg the Digital Skills Partnerships, Creative Estuary, New Creatives, Talent Accelerator, Creative Enterprise Zones and individual sub-sector plans - for screen industries in London).

Local opportunities and challenges of future-proofing a creative skills system

Yet, in a dynamic environment of ongoing change, the future success of the local skills system will depend on its ability to be agile and responsive to continual drivers of change, and evolving industry needs. Not only do these involve international forces and megatrends (around globalisation, innovation, technological and climatic change) but significant skills policy developments. These have been quite substantial, with references by Government that

they seek to *revolutionise the system*. For example, this is evident in steps to:

1. **Strengthen national strategic oversight** with the establishment of a national *Skills and Productivity Board* to provide regular expert advice on *skills priorities* most “in demand” to the skills system, and requiring funding;
2. **Assess the Post-18 Education System and Funding** (ie through the Augar Review) which has aimed to understand how to *improve capacity, access and value for money*;
3. **Enhance system effectiveness and streamline progression opportunities** - various strategic reviews of the qualifications pipeline have been commissioned to *establish what should continue to be funded* alongside A’Levels, T’Levels and Apprenticeships;
4. **Rebalance the system and strengthen technical education pathways**, between further and higher education. For example, there have been further steps to *boost more high-quality apprenticeships (L4+)*, and set up more *Institutes of Technology*, between FE colleges and HE providers; and
5. **Enhance employer engagement**, especially with a range of high-quality employer-led skills initiatives (ie Flexible Apprenticeships and Skills Accelerator Funds).

In an environment shaped by ongoing change, the research explored with local stakeholders’ how they were *evolving the local skills system to maintain its industry relevance*. We explored the opportunities and threats to meeting local creative skills priorities and enabling local customisation. On the positive front, skills partners across the Estuary, were *actively responding to a transforming labour market*, as well as policy developments, taking continual steps to anticipate changing skills requirements and to keep programmes relevant. *A range of programmes were being customised to meet specific needs in sub-sectors and enhancing learning amongst disadvantaged communities*. This included, evolving new flagship programmes in areas such as Apprenticeships. With a fusion in technology and skills, more joint and multi-disciplinary courses were also being provided.

At the same time, however, *there were also significant underlying problems still to address that left unresolved, risked persistent skills deficiencies in future*. Many of these pointed to restrictive national policies from central Government which created various “*system process issues and bureaucracies*” inhibiting local innovation and customisation and, in turn, institutional responsiveness. This was evident in: rigid funding and governance frameworks for skills institutions; frequent centrally-driven policy churn,

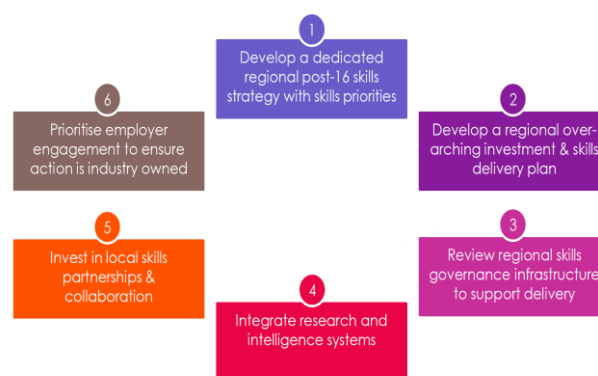
risking misalignment between national and local priorities; and inflexible, top-down programme implementation, limiting local variations. Any flexibility locally was often related to short-term funding and projects, which were hard to sustain.

The Government’s Plan for Growth setting out the future policy agenda, provides a means to resolve such issues. But it also adds complexity with over 180 policies⁸, and additional policy commitments expected to be announced in the next 12 months. If a new sector vision is agreed for the Creative Industries, with Government, this starts to set a long-term context for the TEPC. It is important too, if Government continues to support place-based approaches, that this backs greater space for local action, and builds on previous practices where the Government rewarded positive local results, with a greater “*earned autonomy*”. Local areas need more room to flex national policy levers, overcome centralised restrictions and hence *to set local objectives that drive local programmes, responding to local needs*.

Future priorities for local skills improvements

In the light of these developments, a key out-standing question for local partners, looking ahead, is how best to act in future, nationally as well as locally, to enhance the skills offer for the region? This is especially in the light of ongoing skills challenges, and in the context of continuing change in a post Covid-19 recovery. We have therefore explored through the research possible ways to enhance skills activities in local areas in future and to enable responsible local action for the long-term.

Figure: Future priorities to drive local skills improvements



We have outlined six priorities for regions to consider moving forward, drawing on lessons learned by stakeholders working within the Estuary, alongside wider international good practice on “future-proofed” systems. These suggest:

1. **Developing a dedicated single post-16 skills strategy for the region** – it’s important that different regions develop a distinct creative skills strategy for their *local* skills system and its networks (whether defined by economic functional areas, industry

⁸ Industrial Strategy Council (2021) Annual report

leadership and business communities and/or the local skills institutional infrastructure). This needs to agree *over-arching strategic goals for the long-term, which reflect the composition and hence needs of industry locally and set out a compelling vision for the future* to unite partners and investors. Its aim is to prepare for the long term, unlocking the potential for partnerships and activities that can be appropriately resourced and funded, thus stimulating local funds. As such, it provides the basis *to oversee and better co-ordinate skills activities and funding, supporting continuity in long-term action*.

- 2. Producing an over-arching investment and skills delivery plan** – with a focused strategy, it's important to ensure this is supported by *a clearly specified route map of how it is to be delivered*. This can recognise the objectives of varying individual institutional plans, but seeks to integrate planning across funding sources and partners to be clear where there are shared goals, activities and resources. Furthermore, this can combine planning and activities across policy areas, including central Government, mitigating the risks of silo-working (eg ideally, uniting thinking and action between different policy areas as far as funding rules allow, such as employment, enterprise and industrial policy as well as skills and education – including better links with DfE, BEIS, DWP as well as MHCLG). Ongoing policy developments outlined in the Plan for Growth referenced a number of potential funding opportunities in cross-cutting policy areas such as skills (eg the National Skills Fund) as well as for regions (including UK Shared Prosperity and Levelling Up Funds) and sector specific funds (such as through the revised creative sector visions). New approaches to partnership working such as *"future-back thinking"* have the potential to drive innovation to meet the needs of a modern world. This is vital to support plans for ongoing customisation, experimentation and piloting locally to grow local capacity, fill gaps and enhance policy continuity around mature programmes.
- 3. Refreshing regional skills governance** - Any changes in a region's skills strategy would, of course, also have to be supported by *an appropriate governance system*. In short, where collective activities are identified, appropriate accountability mechanisms need to be in place to provide *strong leadership and effective management* to monitor progress and the delivery of outcomes, support long term continuity and ensure that those with responsibilities have sufficient funding and capacity to deliver. This will also be key in supporting greater cross-policy integration, and a more co-ordinated system-wide and whole Government approach, as seen in the

former industrial strategy policy framework - and now the Plan for Growth.

- 4. Integrating research and intelligence systems** – Local priorities must be informed by robust evidence and deploy up to date local LMI. This will need to consider whether local research and intelligence sufficiently captures the future and *understands the implications of future drivers of change and megatrends*, (such as technological and wider innovations), for creative sub-sectors in the region and their needs (ie for future learning and skills provision).

In addition, it is important to put in place effective management information and evaluation mechanisms to monitor the progress and delivery of initiatives and their outcomes. More fully aligned and *integrated intelligence and information systems*, across a region such as the Estuary, will need to fill gaps in knowledge to enable the tracking of provision and programme effectiveness. This will help demonstrate success, but also will enhance learning. Relatedly, there will be a call for better co-ordination with Government funded LMI – such as those provided to the Skills Advisory Panels⁹ - to fill gaps and better meet DCMS sector definitions.

- 5. Investing in regional skills partnerships** – The strength of local skills systems depends on strong regional partnerships, informed by agreements that support better co-ordination and collaboration. This will help to develop and clarify the multiple levels of "local-local" collaborative working. It's also key to growing a local infrastructure. This needs to enable different skills institutions to come together over common skills issues and shared goals. But, there is also a need to specialise in different creative areas, in a way that aligns provision across the pathway, supports progression and offers a diverse range of expertise overall. Ultimately, this seeks *reaching the critical mass to pool resources, co-create, co-ordinate and work together* across the region, thus creating a greater sum of parts. But at the same time, with greater clarity sub-nationally, there is a need to work through and develop local-national partnerships too and to optimise the alignment of local with national priorities.
- 6. Reinvigorating employer engagement** - Nowhere is the importance of partnership more evident than in relation to employer engagement. It is vital to review, and refresh working arrangements with industry, strategically and through local businesses networks, to improve the basis for stronger collaboration. Industry has a vital role to play in the effectiveness of any local skills system customising content and securing engagement.

⁹ [Skills Advisory Panels: Data sources \(publishing.service.gov.uk\)](https://www.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/674442/skills_advisory_panels_data_sources.pdf)

However, significant challenges remain in engaging businesses in the current UK system. This is in no small part, due to the increasingly fragmented and piecemeal nature of the institutional infrastructure nationally and locally, serving and co-ordinating business and industry needs - not helped by continuous cuts in Government funding over time. The Thames Estuary, like other local areas, through its local institutional networks, has developed distinct partnerships, including with employers, and this will provide the basis to strengthen, amplify and accelerate employer engagement locally. This could encompass a range of activities, including through: formal industry-led advisory boards across the region; large, anchor institutions; local supply chains; business networks supported in sub-regions; and sector-focused intermediaries such as industry and professional membership bodies and Apprenticeships Training Agencies (ATAs).

But, with many of these current practices being connected to individual skills institutions, there is a need to enhance reach, and to scale up. With an eye on the horizon, future policy developments offer potential here. Indeed, a range of future funds (such as the Strategic Development Fund, National Skills Fund, Community Renewal Fund and UK Shared Prosperity Fund) could provide a vital opportunity to review and improve employer engagement mechanisms. If local partners can tap into these funds, this could provide a basis to co-create and test new partnership and skills delivery models. These can be regionally distinct or expand national initiatives such as the proposed *college business networks*.

1. Introduction

This project from the Creative Industries Policy and Evidence Centre (PEC) has involved skills research on the Creative Economy in a local area as a case study to enhance understanding about the realities, opportunities and challenges of driving future growth within regional creative clusters through skills. It has been conducted in the Thames Estuary, to learn lessons from the delivery of skills programmes, which are already being customised to the needs of the local economy and hence local employers. Its intention has been to identify and share learning, drawing from what others have practically tried. The focus on the Thames Estuary reflects the fact that the Creative Industries has been identified as a priority sector in the region and therefore offers distinct insights for wider areas.

1.1 Background and purpose

Over the last two decades the Creative Industries, covering diverse sectors including film, TV, music, fashion and design, arts, architecture, publishing, advertising, IT, video games and crafts, have made a substantial and sustained contribution to the UK economy¹⁰. As such, they offer huge potential for the future. With a range of industries that are innovative, knowledge intensive and export-oriented, their growth has soared over the last decade or so, in a pre-Covid-19 world, stimulated by strong consumer spending, growing global demand and a favourable UK business environment, including generous tax credits. Their success is also in no small part due to the talents of a highly skilled creative workforce in the UK. Indeed, three of the 'highest level occupations' (ie including Managers, professionals; and associate professionals) account for 83% of Creative Industries employment on average, compared to 46% across the UK workforce more generally. Further, 71% of the workforce is qualified at degree level or higher on average, compared to 44% for the whole economy.¹¹ But, past success cannot guarantee strong future performance, and in the context of the Covid-19 pandemic, this has raised significant concerns. Covid-19 brings a wave of disruption, especially hard-hitting to areas dependent on exhibition and audience engagement, which have been substantially affected by public lockdowns and social distancing measures. It has also placed huge pressures on future investment, including in skills.

Policy makers have been considering for some time how to enhance the future growth potential of the UK's Creative Industries for the benefit of more people and places in different regions. Given the effects of the pandemic, and a preoccupation with ways to stimulate economic recovery and long-term growth, this has become even more urgent¹². However, there are a number of challenges to overcome. This is not least in terms of establishing what *distinct* actions will work in driving the future recovery and growth of *creative regional clusters* in

different parts of the UK. In particular, with the vital contributions of a highly skilled workforce, a key future priority has been around skills and ensuring the Creative Industries continue to be supported in the years ahead by the *most talented and skilled* creative workforce.

The recent evidence reviews¹³ of the Creative Industries Policy and Evidence Centre (PEC) have drawn attention, to some of the most pressing priorities for action, regarding skills, talent and diversity in the Creative Industries evident in a modern and dynamic economy. This relates to: significant skill shortages in the labour market; gaps in the skills of the existing workforce; constraints on international mobility and immigration which is limiting access to global talent; a lack of diversity in the creative workforce and significant barriers to under-represented groups accessing jobs and progressing; and growing concerns over the future talent pipeline as the education and skills system is failing to keep pace, increasingly, with the skills the Creative Industries' need. This has brought to life for one sector, some of the challenges, identified by the OECD globally¹⁴ – that is, the problems of a national skills system being able to sufficiently respond to evolving skills needs of industry, so that it can maintain its currency and relevance in an ever-changing future world of work.

"One of the biggest risks of any national skills system in future, is maintaining its currency and relevance in response to a dynamic economy. In a world where shocks like pandemics and extreme weather events owing to climate change, social unrest and political polarization are expected to be more frequent, we cannot afford to be caught off guard again. Education must be ready"

This study seeks to advance our understanding of how to tackle these skills challenges for the Creative Industries by focusing on one local area as a case study. It is known that the success of regional clusters is heavily contingent on access to a highly skilled workforce¹⁵. Indeed, according to the CBI, disparities in skills are one of the biggest drivers of regional variation in productivity and hence raising skills levels is a vital means to secure future regional productivity improvements.¹⁶

¹⁰For example [DCMS Sectors Economic Estimates 2019: Trade - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428247/DCMS_Sectors_Economic_Estimates_2019_Trade_-_GOV.UK.pdf)

¹¹ [Giles et al \(2020\) Creative Skills Monitor](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428247/DCMS_Sectors_Economic_Estimates_2019_Trade_-_GOV.UK.pdf)

¹² HMT (2020) Plan for Jobs 2020 [A Plan for Jobs 2020 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428247/DCMS_Sectors_Economic_Estimates_2019_Trade_-_GOV.UK.pdf)

¹³ Carey et al (2019) Skills Talent and Diversity [Creative Industries Policy & Evidence Centre \(pec.ac.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428247/DCMS_Sectors_Economic_Estimates_2019_Trade_-_GOV.UK.pdf) and [Giles et al \(2020\) Creative Monitor](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428247/DCMS_Sectors_Economic_Estimates_2019_Trade_-_GOV.UK.pdf)

¹⁴ [OECD \(2019\) Skills Strategy](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428247/DCMS_Sectors_Economic_Estimates_2019_Trade_-_GOV.UK.pdf)

¹⁵ The Royal Society (2020) Research and Innovation Clusters.

¹⁶ [CBI \(2017\) unlocking regional growth](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/428247/DCMS_Sectors_Economic_Estimates_2019_Trade_-_GOV.UK.pdf)

There is, therefore, huge potential to learn lessons from the delivery of skills programmes, which are already being customised to the needs of a local economy and delivered through stronger local partnerships with industry. As such, **a core aim is to understand the working realities of seeking to support future regional growth within creative clusters through skills.** The Thames Estuary has been selected for the case study because it has been backed by Government as having growth potential and, also, has identified the Creative Industries as a priority. As the region seeks to invest in innovation and skills, it therefore offers distinct insights and learning for wider areas. For the PEC, this research represents a chance to better understand some of the practical skills issues, opportunities and challenges for the sector in building agility into local skills systems. The current Plan for Growth which begins to set out the roadmap for economic recovery across the UK, outlines the importance of **nurturing skills investments in local areas through local skills improvement plans** which can support lifelong learning for all. This study hopes to draw insights of **what factors can help- such plans to be more of a success for the Creative Industries.**

1.2 The case for local action

Whilst the Creative Industries have been an engine of growth in local economies across the UK over the last decade or so, they are heavily regionally concentrated and more so than other sectors¹⁷. Indeed, they are especially prominent in London and the South East, and five leading UK cities attract most of the activity, including Manchester and Bristol in England, Cardiff in Wales, and Edinburgh and Glasgow in Scotland. Further, these more mature sites have become ever more specialised over the past 20 years.

However, in the recent past, prior to the Covid-19 pandemic, there have been significant variations in labour productivity between the different creative sub-sectors in the varying regions of the UK. Indeed, rates of employment and productivity growth in the Creative Industries have been much faster in London (and the South East) than in the rest of the UK.¹⁸ This highlights the importance of understanding the spatial growth patterns of sectoral or specialist clusters in more depth, such as those within the creative industries, to unlock more balanced regional performance in future across the UK.

Governments have been working with local areas for many years to identify and help develop local specialisms connected to industrial and economic

clusters of businesses. In particular, this has sought to stimulate economic regeneration through smart specialisation in high value activities, promoting innovation, a highly skilled workforce and high performance working. This is exemplified in the 2017 Industrial Strategy – the current strategy at the time of the study.¹⁹ The Industrial Strategy recognised that agglomeration and co-location really matter in strengthening local assets and innovation and skills ecosystems. For instance, *agglomeration* can bring significant advantages from *a critical mass of businesses, workers, and institutions in the local infrastructure*, and in particular, dense networks of partners, providers, suppliers and collaborators. This is especially in terms of facilitating access to resources, skills and ideas, and, hence, stimulating innovation through better knowledge transfer and learning²⁰.

As such, a range of policies are being deployed to enhance the local institutional delivery infrastructure in different regions and to help support local areas of economic strength, as a basis to drive stronger regional clusters and local economic performance in future. This is seen, for example, with an emphasis on *supporting stronger place-based approaches*, co-ordinated by Local Enterprise Partnerships (LEPs) and Combined Authorities, working with different partners across more *functional economic areas*. The intention was then that these place-based plans can then be managed through Local Industrial Strategies (LIS)²¹ – to be replaced by local economic recovery plans from 2021 – to support the development and delivery, collaboratively, of more locally customised initiatives. A key objective was, thus, to supplement mainstream national programmes such as Growth Hubs, Enterprise Zones, Institutes of Technology, and sector academies. Of course, a central purpose of the LIS is that it can connect to, and align with, the principles of the national Industrial Strategy, ensuring better co-ordination between national and local actions. The Industrial Strategy takes a *whole-government, multi-stakeholder multi-tiered approach, seeking to integrate delivery across multiple policy areas, and hence different portfolios, to achieve shared goals*. The system-wide policy framework was captured by the five policy foundations.

Figure 1: The Industrial Strategy Framework

¹⁷ Nesta (2017) Creative Nation. [creative_nation-2018.pdf \(nesta.org.uk\)](#)

¹⁸ Tether B (2019) Mind the Gap: Regional Inequalities in the Creative Industries.

¹⁹ BEIS (2017) Industrial Strategy. [Industrial Strategy: building a Britain fit for the future - GOV.UK \(www.gov.uk\)](#)

²⁰ Nathan M (2013) Agglomeration, clusters and industrial policy.

²¹ Local industrial strategies (LIS), led by Mayoral Combined Authorities or Local Enterprise Partnerships have been commissioned in 3 waves and not all have been completed [Local Industrial Strategies to drive growth across the country - GOV.UK \(www.gov.uk\)](#)



Source: (BEIS) Industrial Strategy 2017.

Furthermore, a focus on long-term objectives is encouraged with a series of mission-focused, *grand challenges*, such as unlocking the benefits of *Artificial Intelligence and the Data economy* and *clean growth*.²²

Local strategies have been intended to combine with targeted country-wide, sector initiatives or Sector Deals (now evolving into sector visions). These are providing a means to develop and grow the strengths of particular sector clusters in different parts of the country, through long-term partnerships between industry and Government. These offer a further basis to customise programmes and policies and also aim to leverage greater co-investment. The Creative Industries was one of the first five to be developed²³. Bespoke regional and sector work is then also being enhanced through further targeted policy initiatives. For instance, funding available to support innovation through the Industry Challenge Fund, has initiated the development of a dedicated *Creative Clusters Programme* to stimulate the growth of regional clusters in different parts of the UK. This is being run by the Arts and Humanities Research Council, and complements the work of the PEC.

Box 1: The Theory behind Clusters

Clusters are geographic concentrations of interconnected companies and institutions in a particular field. Clusters encompass an array of linked industries and other entities important to competition.

They include, for example, suppliers of specialised inputs such as components, machinery, and services, and providers of specialised infrastructure. Clusters also often extend downstream to channels and customers and laterally to manufacturers of complementary products and to companies in industries related by skills, technologies, or common inputs.

Finally, many clusters include governmental and other institutions—such as universities, standards-setting agencies, think tanks, vocational training providers, and trade associations—that provide specialised

training, education, information, research, and technical support.

Source: Porter, Michael E. 1998 *Clusters and the New Economics of Competition*

Together these local area strategies and Sector Deals seek to improve the conditions for better regional performance and sector productivity, whether it be: boosting skills; identifying where the greatest value can be gained from research and development and technology investment; commercialising research; seeking access to finance; strengthening supply chains; increasing exports; looking at how to use trade and investment deals; creating a more supportive regulatory environment; enhancing the quality of the infrastructure; and providing tailored business support to enhance business development and performance. These activities are drawing on existing evidence and international best practice about what factors are critical to the success of clusters, and hence stronger regional growth and economic performance²⁴.

But, the Government is also incentivising stronger place-making and place-based collaborations across more extensive regional boundaries such as the *Northern Powerhouse*, the *Midlands Engine* and the *Thames Estuary*. The potential of a broader geographical approach means that, where missions are common, resources and expertise can be pooled to enhance the local impact, and sectoral and local coalitions can be joined up to create a greater sum of parts, achieving more significant ambitions. One such example is with the Thames Estuary, where partners have come together to deliver a stronger future for the Creative Industries, through the development of a dedicated strategy and programme of work – the specific actions for the Creative Industries are captured within the *Thames Estuary Production Corridor Vision*²⁵ (TEPC) published in July 2020.

1.3 Creative Industries in the Thames Estuary

In spring 2019, the Government backed the future vision for growth for the Thames Estuary developed by the Thames Estuary 2050 Growth Commission²⁶. The Estuary is an area in the South-East of England, stretching from East London through north Kent and south Essex. It has a long history, with waves of growth, but in a modern world has yet to realise its full potential and it wrestles with a range of challenges. The area is characterised by a “*low wage, low skilled*” economy and has constraints on

²² While the Plan for Growth has modified this framework, it retains a focus on multiple policy objectives and long term-missions.

²³ *Creative industries: Sector Deal - GOV.UK* (www.gov.uk)

²⁴ The Royal Society (2020) *Research and Innovation Clusters*.

²⁵ *TEPC VISION.pdf* (southeastlep.com)

²⁶ *Thames Estuary 2050 Growth Commission report - GOV.UK* (www.gov.uk)

social progression and good work. Looking forward, given its assets, it is an area which offers many opportunities: with its proximity to London; international trade via its ports; strong education institutions, including some internationally recognised universities; presence of major sectors and large anchor businesses; and availability of land to deliver high-quality and affordable homes and workspace.

The Thames Estuary Growth Board (TEGB), which was established in 2020, led by government-appointed Envoy, Kate Willard (OBE), sets out how to drive productivity and growth in the area through its own Action Plan.²⁷ Central to the Action Plan is the need to recognise and to support *locally distinctive sectors*, which capitalise on the area's assets – one of which is the Creative Industries. The Growth Board recognises the importance of the *creative and cultural economy* and demonstrates this through its backing of the Thames Estuary Production Corridor (TEPC) Vision. The TEPC Vision acknowledges the rich cultural and economic heritage locally, and strong existing networks of creative organisations and sets out a Vision for how the area can develop and become a world-class centre for creative production in future.

"Our vision for the world's largest creative production corridor is bold. It will position London and the South East as a world leader for the creative industries on a scale never seen before, creating a landmark corridor along the Estuary, powering skills opportunities and new jobs."

Sadiq Khan, Mayor of London, 2017²⁸

Whilst the Vision has been led initially by the Mayor of London, the London Economic Action Partnership (LEAP) and the South-East Local Enterprise Partnership (SELEP), its strength stems from the commitment and creative expertise of a broad TEPC community that has developed. This brings together wide interests nationally and internationally as well as across the Estuary and involves a range of partners, including: Kent and Essex County Councils; 18 local authority areas (with creative insights represented by the South East Creative Economy Network (SECEN); creative businesses, and several cultural organisations.

The TEPC Vision outlines an ambitious programme, seeking to develop a series of state-of-the-art creative and cultural production centres across the Estuary into larger scale, globally recognised creative clusters or *"super clusters"*. These are being underpinned by a number of locally run projects and targeted investments. These will seek to enhance the creative infrastructure, including: repurposing brownfield, workspace made available

through industrial decline; providing high quality state of the art and affordable cultural and arts facilities, with high-speed digital connectivity; supplying a skilled workforce; ensuring access to a specialist network, which can drive ongoing innovation, skills development and business improvements. A core aim is to shape the local environment and ecosystem to better meet the future needs of creative businesses in the area, such as film, tv and arts studios, fashion manufacturing hubs and production centres for music and the performing arts. This will seek to extend the multiple creative uses of sites locally as networks for incubators, accelerators, co-working and "maker spaces", and serviced creative and cultural hubs.

As part of the wider strategy for the Thames Estuary, the TEPC plans have the potential to drive inclusive growth: enhancing productivity, supporting industrial diversification, promoting regeneration, creating employment and skills opportunities, and tackling deep-rooted inequalities. In particular, with a *strong skills infrastructure* within the Estuary, involving a network of schools, further education colleges, Independent Training Providers and research institutions and universities expert in the industry, this has the *ability to create significant opportunities for strategic skills* programmes and to *enable the growth of locally grown creative talent*. A key question however is whether this potential can be realised.

The Government has demonstrated its specific support for the TEPC Vision as part of its Creative Industries Sector Deal, with additional funding such as the award of £4.3 million in 2019 to north Kent and south Essex, leading the establishment of Creative Estuary²⁹. This builds on awards already committed to the area through the TEGB for example. This investment is all the more significant given that the Estuary is one of only five locations across England that has received funding as part of the £20 million Cultural Development Fund (CDF). This Fund aims to drive future local economic growth through investment in culture, heritage and the Creative Industries across the country. The Government hopes the specific award will accelerate the development of the TEPC over the next 3 years.³⁰

1.4 Research focus

These developments have, therefore, provided an important focus for this research. Because of the scale of ambition in the Thames Estuary, and the stage at which the area is at in its journey, the PEC has sought to use the TEPC project as a local case study – the Estuary undoubtedly offers distinct

²⁷ TEGB (2020) [TE_Action_Plan101.pdf \(thamesestuary.org.uk\)](#)

²⁸ [TEPC_VISION.pdf \(southeastlep.com\)](#)

²⁹ [Creative Estuary | A good place for making](#)

³⁰ During the course of the study the project timeframe for Creative Estuary has been extended by a year due to the Covid-19 pandemic.

insights from the individual nature of its developments, investments and circumstances. But, significant challenges come with high expectations as well as opportunity.

Previous research conducted by the PEC has highlighted significant issues for the national UK skills system to overcome, not least around ensuring a highly skilled creative workforce for the future as well as currently³¹. Given that the PEC aims to use its research to help inform the development of practical skills solutions, this project has presented an opportunity to better understand how some of these critical current and future skills issues identified for the sector are playing out locally and what can be done to resolve them. There is huge opportunity to learn lessons from the delivery of skills programmes, which are already being customised to the needs of a local economy and delivered through stronger local partnerships with industry. A core aim has therefore been to understand the practical realities, opportunities and threats of seeking to enhance the responsiveness of the skills system in a local area and *bring local implementation to life* – in this case seeking to meet the industry needs of creative regional clusters. The intention has therefore been to use the Thames Estuary to provide practical insights and shape 'roadmaps' to future action for wider areas.

1.5 Overall objectives for the research

The work programme for the TEPC research study has involved a mixed methodology including: desk based research, reviewing the existing evidence on the Thames Estuary and TEPC; qualitative interviews with a broad range of stakeholders within and outside the region (around 40 interviews primarily within local authorities, LEPs, businesses, and a range of education providers); and quantitative analysis of local labour market information capturing employment composition and engagement in different parts of the skills system. The research has been structured around 3 main stages. These have aimed to understand:

1. **The rationale for the Thames Estuary Production Corridor:** The research has examined the shape of the Creative Industries footprint within the Thames Estuary economy to begin to understand the rationale for a dedicated Creative Industries' Strategy in the region in the form of the TEPC. The research has explored the sub-sector composition of the local creative economy, to more fully understand the local creative assets, and the future opportunities they present. It investigates variations in the sub-sector significance and specialisation within the region and growth trends over time, including the likely future growth potential. This has then

provided the basis to take a closer look at the features of the TEPC Vision, the Action Plan, and the project pipeline, to support and grow the network of creative clusters across the Estuary over the next 30 years. This sets the context to understand the role of skills investments within the local skills system within this Plan.

2. **The local skills system in the Estuary:** The study has then aimed to take a closer look at what the local education and skills system looks like relative to the local economy and understand the nature and distinctiveness of what skills programmes are offered, especially in relation to the Creative Industries – that is to establish local specialisms. A key intention has been to understand local strategic objectives shaping creative education locally, and to bring the local creative skills offer to life, with the use of stakeholder insights and illustrative case studies.
3. **The Local Challenges, Opportunities and Lessons for a future-proofed creative skills system.** Finally, the research has sought to review the practical realities of local skills delivery and the customisation of local creative skills programmes, especially in the light of ongoing developments and changes in the system. This is not only due to Covid-19 but longer running labour market changes and continuing national education and skills policy reforms. The research considers local stakeholders' perceptions of change, and the ongoing skills challenges and opportunities this brings to the region and the practical realities of trying to balance national and local priorities. More specifically, the intention of this research is to understand the implications an evolving skills system raises for the nature and focus of local skills delivery in future. Whilst the Thames Estuary is used as a case study, the focus is less on the region per se but what insights this might provide more generally for the operation of skills programmes in wider areas and what actions might help secure future skills improvements locally.

During the study, the external environment has been extremely disrupted due to the effects of the Covid-19 pandemic, in quite exceptional and unexpected ways which will have introduced new issues and challenges. Of course, many of the skills challenges studied existed even before the Covid-19 crisis. But, Covid-19 has brought a new and distinct wave of disruption. This has been especially hard-hitting to parts of the Creative Industries dependent on exhibition and audience engagement – these areas have been substantially affected by public lockdowns and social distancing measures. As such,

³¹ For example, Carey et al (2019) Skills, Talent and Diversity in the Creative Industries: Evidence synthesis and scoping report

given the effects of the pandemic, and a growing preoccupation with ways to stimulate economic recovery, the pandemic has also become part of the research. Indeed, during the study, there has undoubtedly been a growing additional interest in drawing lessons about how local ecosystems adapt to a future world, which might be increasingly characterised by more regular change and

substantial, distinct and disruptive events and shocks such as the pandemic. There has, in addition, been a concern in what *distinct* actions will work in driving the future recovery and growth of *creative regional clusters*, and ensuring they are supported by the most talented and skilled creative workforce in future.

1.6 Report Structure

The report sets out the results from the evidence review and analysis and is structured as follows:

- Chapter 2:** Explores the *shape of the creative economy in the Thames Estuary* to understand the rationale for a dedicated strategy for the creative industries and how this has influenced the *TEPC Vision, Action Plan and projects*
- Chapter 3:** Examines *what the local education and skills system looks like* within the Estuary, relative to the local economy, and to understand the distinctiveness of the skills offer in the region, especially in relation to the Creative Industries. A key focus has, therefore, been to explore where and how the system has been customised.
- Chapter 4** Reviews the *practical realities of local skills delivery* and the customisation of local skills programmes, especially in the light of ongoing developments and changes in the system, driven by continuing skills policy and system reforms, as well as of course external drivers – including the Covid-19 pandemic. We consider how well the current skills system is working for the Creative Industries within the Estuary, what are the challenges and what implications this raises for the nature and focus of local skills delivery in future, using TEPC as a case study.
- Chapter 5** Finally, outlines the conclusions of the study, draws some *insights from current practices* and *identifies priorities* and lessons for wider areas to support improvements in the delivery of stronger local skills systems in future.

2. Understanding the Thames Estuary Production Corridor Clusters and Project Pipeline

2.1 Introduction

The research starts by examining the shape of the Creative Industries footprint within the Thames Estuary economy, to begin to understand the rationale for a dedicated Creative Industries Strategy in the region in the form of the TEPC. As part of this process, the research has explored the sub-sector composition of the local creative economy to get a fuller picture of the shape of local creative assets and future opportunities they present, in different parts of the creative sector. This has then provided the basis to take a closer look at the TEPC Vision and Action Plan and the project pipeline it is developing, to support and grow the network of creative clusters across the Estuary over the next 30 years and beyond. This sets the context to understand the role of skills investments alongside a wider package of support services under development as part of the TEPC project.

2.2 Thames Estuary Creative Economy

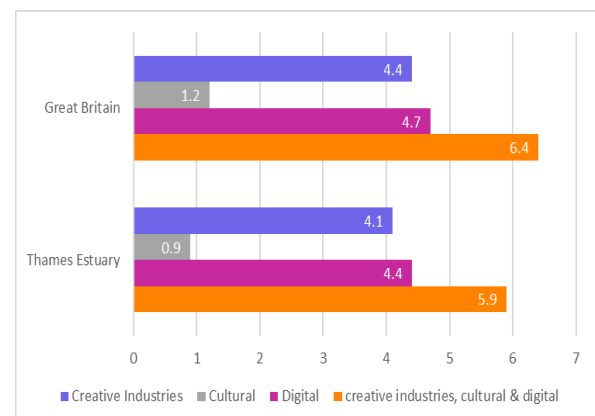
It has been important to review the shape of the creative economy prior to the Covid-19 crisis to understand the conditions, which inspired the TEPC Strategy.

The shape of regional creative clusters in the Estuary

The Thames Estuary has had a relatively strong labour market in recent times, which has provided important foundations for developing the creative economy. Prior to the pandemic, economic activity rates in nearly all local authority areas were close to or higher than the national average (79%) and the region had a similar level of skills distribution to England as a whole, with around 85% of the population qualified to NVQ1 and above, and nearly two fifths qualified at NVQ4 or higher. Although there are parts of the Estuary in the top 30% most deprived areas nationally, and some low skilled areas, overall, the region generally has had a highly viable workforce, particularly in the context of a future agenda that seeks to invest more in skills, and support upskilling, reskilling and lifelong learning. It was, therefore, perceived by local partners to present a fertile site for strong future growth of the creative and cultural industries. Even in a post Covid-19 environment, these historical economic foundations were felt to offer much

potential for a long term economic recovery for the region. A closer look at the sector highlights the potential further.

Figure 2: share of employment in the Creative Industries



Source: DCMS, ONS, OE

The Creative Industries have been a success story nationally over the last decade, growing faster than the economy as a whole in employment as well as economic terms.³² In the run up to the development of the TEPC Vision, the Thames Estuary had exhibited similar trends. Indeed, the size of its Creative Industries sector was on a par with the national position, with a total share at around 6% of the local economy (figure 2), and it had exhibited significant growth in the previous five years running up to that period (ie growing by around a third). More specifically, prior to Covid-19, there were around 55,000 creative and cultural jobs in the core Thames Estuary region and 17,000 businesses at the time of the publication of the TEPC Vision. This reflected a stronger relative position to the broader region overall, as evidenced in a steady increase in business growth (+27%) and employment (+11%) – a level of growth that also exceeded rates for the English economy as a whole over this period. This had therefore created great interest in mechanisms to attract more creative businesses to the economy, and to support their future growth.

The picture was further enhanced when capturing self-employment. Indeed, with around 17,000 self-employed workers in Creative Industries within the

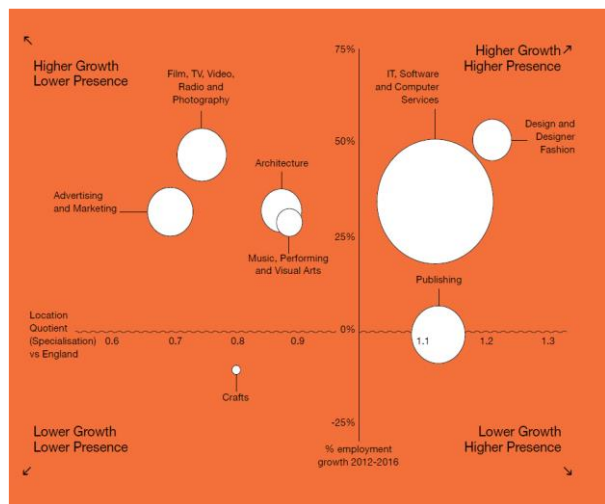
³² Giles et al (2020) Creative Skills Monitor

Estuary, the level of self-employment had increased by over half, during the same period, and 79% in East London alone. The sector, therefore, based on past growth performance, had represented a strong local asset, with significant future growth potential if previous rates of growth were to continue as forecast³³. At the time of developing the TEPC Strategy, the Creative Industries, therefore, were perceived to offer significant opportunities, demonstrating the potential to raise skill levels, as well as economic activity rates, in the region. The focus on the Creative Industries was important not only in highlighting new directions in sector specialisation in the creative economy, but wider routes for creative innovation and greater entrepreneurialism too.

Regional and sectoral specialisation

This research has also sought to examine the sub-sectors of the Creative Industries to more fully review the strength of opportunities in different parts of the creative economy and the nature of local assets. Whilst all the Creative Industries are represented within the Estuary, the different sub-sectors have been assessed more closely to understand variations in their *significance* and *specialism* over time within the region, and therefore where services may need to be targeted. Our research reviewed evidence considering: their recent *scale* and *presence*; and their *growth* - historically and 'likely' growth in future, based on their value-add, market-strength and investment potential.

Figure 3: The creative sub-sectors in the TEPC



Source: [IEPC case for investment 2020](#)

The analysis conducted for the TEPC confirmed growth in the recent past across most of the subsectors, with the majority of the Creative Industries, displaying an increase. This included *Film*,

TV, video games, Fashion and Design, Architecture, Advertising, IT, and Museums & galleries. That said, there were exceptions for *Publishing* and *Music, Performing & Visual arts*, which had retained their position. It was only the Craft sector which had slightly declined. This undoubtedly in part reflected the success of London more generally, with all these sectors displaying significant growth in the capital, especially *Advertising, Music & the performing arts, Architecture, IT* and *Film & tv*³⁴. Indeed, the Cultural Strategy³⁵ for London highlights that London remains the third largest centre for film production in the world and in 2016 UK-made films and TV production generated approximately £7.9bn of inward investment. Furthermore, it is said to be one of the top four fashion capitals. As such, these sub-sector assets were noted for their future growth potential more widely across the Estuary.

The review also considered *recent presence* alongside recent growth. This showed that the *IT, Software & Computer Services subsector was by far the largest and most specialised* in the Estuary. As a growing, specialised and higher value sub-sector, it was expected to continue to be significant to the future local economy, especially given the importance of digital technologies generally to the economy. This was closely followed by a number of other sub-sectors that, whilst not of sufficient scale to be as specialised, had grown substantially and/or had significant recent presence in the region. These, wider sub-sectors, therefore, also suggested, greater potential for future growth and specialisation, especially with additional support, in a post-Covid-19 recovery. They included *Film, TV, Video, Radio & Photography; Architecture; Advertising & Marketing; Music, performing and visual arts; Design; and Museums, libraries & galleries*.

The review also considered the spatial distribution of the creative footprint across the region. Whilst all the Creative Industry sub-sectors were widely distributed across the Estuary, there were some significant geographic concentrations or regional clusters in and outside London, which have already become more established. Of course, it is well known that the Creative Industries are more generally a particular specialism in London. Indeed, recent analysis from the PEC shows that the London workforce in the Creative Industries makes up over a third of total employment in the sector for the UK – further London and the South-East combined account for around half of total employment in Creative Industries for the country as a whole³⁶. As such, it was perhaps unsurprising to find a greater concentration of Creative Industries, and hence a greater propensity for clusters, in the eastern part of the Estuary, with

³³ [creativity and the future of work 1.1.pdf \(nesta.org.uk\)](#)

³⁴ GLA Economics (2018) London's Creative Industries Update. Working paper 89

³⁵ Drawing on evidence from the Office of the British Film Commission (2018)

³⁶ Tether B (2019) Mind the Gap: Regional Inequalities in the Creative Industries.

close proximity to London. Indeed, East London has developed a higher share of employment and businesses than the national average for England (albeit lower than London as a whole). Furthermore, two of the largest creative clusters within the Estuary were found to be in or close to East London. One can be found in the Olympic Park area around Stratford and another captured the High House Production Park, with the Royal Opera House, in Purfleet (see below).

2.3 Thames Estuary Production Corridor Vision

The TEPC Vision has aimed to build on current core creative assets in the area, and unlock long term, transformational, culture-led improvements across East London, North Kent, and South Essex. The intention has been that by investing in the cultural infrastructure, supporting Creative Industries, the Strategy will: develop a stronger *shared creative and cultural identity* to raise the profile and attractiveness of the area to new talent and investment; *grow local skills*; enrich the community and its local heritage; and create more opportunities for people of all backgrounds in cultural and creative activities, thus *enhancing the diversity and inclusiveness* of the creative and cultural workforce.

...“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”...

The Vision was launched in 2017 as a key partnership project across the Thames Estuary. This was initially led by the Mayor of London and the LEAP, the SE-LEP and the SECEN.³⁷ This Vision in part sought to bring together and build upon the important foundational work that each of these partners had led in their respective regions, as well as the work of local authorities across North Kent, South Essex, and East London.

For example, the Creative Industries have been identified as an important priority both in London and across the South-East for some time. Indeed, this has been reflected in the individual Economic Development Strategies of the Mayor of London³⁸ and SELEP³⁹. Furthermore, the significance of the sector was also recognised in the fact that local partners in the region (from the LEPs to local authorities) had developed dedicated cultural and

creative strategies. These sought to ensure the area worked more systematically: to map their creative assets locally; identify barriers to growth; and then, to develop and co-ordinate practical and scalable initiatives to overcome these barriers as a basis to accelerate future growth of the sector. Clearly some of these would be sub-regional and others, in time would be operating at a TEPC level.

As such, there was an appreciation that there were wider agglomeration benefits in combining efforts across the Estuary, to amplify local and sub-regional effects, and hence add broader value. Consequently, a shared TEPC Vision was developed as a basis to enhance collaborative working and to accelerate, in future, knowledge exchange and the scaling-up of what works. To ensure effective delivery, and hence the long-term success of the project, this too has needed to draw upon a much wider TEPC consortium. This has brought together key regional interest groups that can drive action Estuary-wide, both on the ground and strategically. This has worked to unite Central Government, the local authorities across the Estuary and their intermediaries, local education institutions and skills providers, professional and industry bodies, as well as local residents and businesses. The Thames Estuary Partnership now involves: Kent and Essex County Councils; 11 local authority areas represented by Thames Gateway Kent Partnership and Opportunity South Essex, SECEN; 7 East London boroughs⁴⁰; the Royal Docks; the University of Kent and the University of Essex; and several cultural organisations such as Metal and Whitstable and Biennale. It also seeks to draw on broader national and international partnerships and evolve networks over time.

Crucially, it has been recognised at the outset that delivery of the whole TEPC Vision is a *long-term* process. The original Vision set out a 30-year horizon and the broader TEGB strategy has a line of sight up to 2050. As acknowledged in the case for investment, this Vision also depends, to be effective, on a number of principles, not least: an *integrated, multi-stakeholder approach*; *a cross-cutting and multi-dimensional action plan or framework*; and *multiple investments* and *policy tools* operating at a regional and sub-regional level - this is of the kind offered by the Industrial Strategy and its five foundations and most crucially to this study includes skills. It will also call for strong pan-Estuary *strategic oversight, leadership and governance*. Whilst the Industrial Strategy has since been replaced by the Plan for Growth, partners seek to preserve with

³⁷ The South East Creative Economy Network (SECEN) was established in 2013 to accelerate growth in the digital, creative and cultural sector across the SELEP area. It aims to implement practical and scalable initiatives to drive growth of the Creative Economy in the South East. It seeks to drive growth by sharing good practice through collaboration, knowledge exchange and networking. Its terms of reference are [here](#)

³⁸ Greater London Authority (2018), 'The Mayor's Economic Development Strategy for London'.

³⁹ SELEP (2014) [Strategic Economic Plan 2014](#).

⁴⁰ It includes seven East London Boroughs: Barking and Dagenham, Bexley, Greenwich, Havering, Lewisham, Newham and Tower Hamlets.

Government an ongoing focus on these core principles.

As the TEPC has identified the Estuary as a significant strategic location for Creative Industries, this puts a distinct emphasis on the importance of *place-making*. This is where a clear and compelling, strategy for a place or region, and inspiring ambition, drives collaborative planning, decision-making and *partnership* working across the place or region. This will be key to *uniting the diverse partners* pooling their expertise and resources towards locally *shared priorities* around the TEPC.

Whilst individual actions of each partner will be distinct, the power of place-making is also about collaboration and hence unlocking a *greater sum of parts*, when the individual effects come together behind the common goals – whilst delicate it is an important line to tread. The Vision has therefore been carefully developed to unlock the full potential of place-making and collaboration locally.

What has shaped the broad approach?

The TEPC approach draws on national⁴¹ and international best practice⁴² regarding the growth dynamics of regional clusters in Creative Industries. This has highlighted key patterns, features and cycles of cluster growth, which local partners have aimed to optimise to enhance local effects. Wider research such as that conducted by Nesta has explored the *features of clusters that unite geographic concentrations of creative businesses around common interests, knowledge, and skills* and which support the basis for stronger collaboration, performance and growth. This has demonstrated the importance of *large* and *high-growth firms*, as seen in *creative capitals* such as London. Indeed, large businesses are vital, in particular, as more solid, *"anchor businesses"* enhancing connections and growth through business networks and supply chains. These also play a key role supporting greater specialisation, and concentration, with more mature clusters in the UK becoming more specialised over time. But, the growth in *micro-businesses* is also key too. These may start out as younger, emergent and less stable (forming *incipient clusters*), with high levels of churn, but can build as part of a supportive regional creative cluster into more steady growth.

In addition to creative cities (or creative capitals), clusters can take the form of *creative districts* and/or *conurbations*. **Creative districts usually consist of many different sub-sectors, micro-businesses, high survival rates and fewer high-growth businesses. Conurbations are specialised in fewer sub-sectors,**

but, exhibit more stable trajectories, and also include high growth firms.

Existing research also outlines the benefits of *'smart specialisation'*, which has been increasingly gaining ground in recent years, promoted by international communities such as the European Union.⁴³ This recognises that successful clusters are emergent rather than created. As such it involves prioritising investment and, in particular, stimulating innovations (and learning) to enhance *existing regional competitive strengths*.

*"...successful [clusters] are not started from scratch, but instead are built on a pre-existing economic and physical base. Policymakers or other leaders can help transform a barren landscape into fertile ground, but a seed must be available that can grow to fruition."*⁴⁴

Research, such as at the Brookings Institution, has also pointed to wider success factors. This highlights, for example, the significance of a supportive infrastructure and environment, where services are targeted towards the demands of core local Creative Industries (i.e. providing an area of absolute or comparative strength). These specialised support services might include: *access to private and public funding; strong leadership; research and development; sophisticated demand; supportive regulatory environment; a skilled workforce; and business capabilities*. Furthermore, of particular interest, local interventions and investments have been found to strengthen the local infrastructure where they support growth within the *clusters to form a critical mass of businesses*, sharing common supply chains, complementary technologies and investing in similar skills, for example. This *critical mass can then provide a stronger basis for local collaboration and wider partnerships and networking, evolving the local ecosystem* to better support local agility and a cycle of ongoing growth. Such insights are arguably of specific importance, at a time, when the Government seeks to strengthen local delivery infrastructures through stronger place-based strategies in future.

Partnerships and networking can provide a vital means, therefore, for building lasting, trusted relationships for learning, knowledge exchange, tapping into expertise, innovating, accessing new skills and insights, and regeneration, thus strengthening the *capacity and capability of practitioners within the local ecosystem itself*. Networks are particularly powerful, where they enhance connections through day to day operations. These may be via supply chains, project work, and broader partnerships including with wider

⁴¹ Nesta (2018) Creative Nation.

⁴² Thames Estuary Production Corridor: [Case for Investment](#). Hatch Regeneris, We Made That, & Tom Fleming Creative Consultancy

⁴³ European Commission. 'What is Smart Specialisation?'

⁴⁴ Brookings Institution (2017) Clusters and Innovation Districts: Lessons from the United States Experience.

experts and agencies such as colleges, universities, and training providers – this maintains regular contacts sustained by a real need or purpose.

Whilst its perhaps too early to categorise cluster developments within the Estuary, in the shaping of the TEPC approach, a key intention has been to *learn lessons from existing good practice. As such, partners within the Estuary had aimed to accentuate the common and distinct creative capabilities locally and leverage value* in a way that can seek to achieve these kinds of benefits for the region in the long-term - thus driving future growth.

"...the world's largest creative production corridor; creating a landmark corridor along the Estuary, powering skills opportunities and new jobs"⁴⁵

Given the economic context and composition of the area, with an already significant creative network of specialised clusters, hubs, with large anchor creative businesses and micro-clusters, covering many sub-sectors within the Creative Industries, this has set the conditions for the TEPC Vision. The ultimate goal has been to create an *international reputation as a world class centre for creative and cultural production* across the Estuary. This seeks therefore to benefit from the distinct combination of its local assets such as its proximity to London, and wider availability of land to deliver high-quality and more affordable workspace and homes, with its various creative hubs. This can best be illustrated through a closer look at the local creative geography and associated ecosystem and infrastructure.

Box 2: The geography of the TEPC

TEPC East London	TEPC North Kent	TEPC South Essex
Lewisham	Dartford	Thurrock
Bexley	Gravesend	Castle Point
Tower Hamlets	Medway	Southend
Newham	Swale	Rochford
Barking & Dagenham	Canterbury	Basildon
Havering	Thanet	
Greenwich		

The local network of creative places

The TEPC Vision sets out an ambitious programme of locally run projects and investments, centred around several creative production sites that form a creative network across the region - approximately 30 or so sites have already been identified. Drawing on existing evidence, the Vision takes an *asset-based approach*, aiming to build on the local

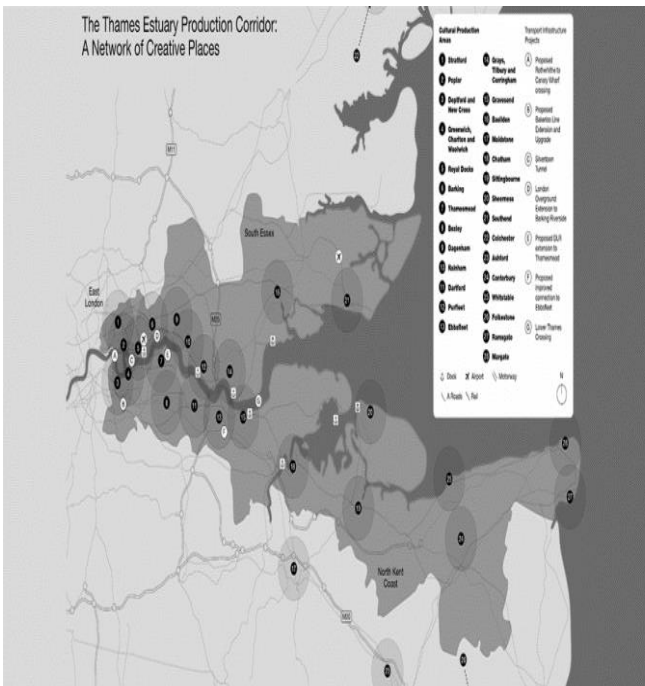
heritage by strengthening, enhancing and evolving established *local creative assets*, and recognising past regional strengths, traditions, customs and practices. Crucially, a key goal therefore has been to drive local investment and a supportive infrastructure that evolves *existing creative specialisms and capabilities*, and accelerates growth, across the Estuary as a whole, through better networking and knowledge exchange towards a *global creative regional centre or super-cluster*. In particular too, there is an ambition to better *link business networks and supply chains connected to London, other parts of the UK, Europe and wider global markets*.

This has called for a multi-dimensional and partnership approach, tailoring investments and actions to local needs sub-sectorally and sub-regionally. For example, the TEPC project has distinguished *between growth engines which are larger creative production sites with high growth firms and local sparks – smaller sites with more emergent, micro-businesses* offering huge future creative potential. As these local assets, develop their own local *brands and identities* for the region, the aim is that this adds to the overall profile and creates a more virtuous cycle, driving growth, attracting more businesses and in turn generating further investment. As such, a central objective is that regional investments co-ordinated and amplified through the TEPC project can grow creative and cultural communities and connections from the *bottom up*. These can work with prominent, and hence more mature *anchor institutions, including key public institutions such as local authorities, universities and colleges* within the developing local ecosystem.

A closer view of the local creative assets

Figure 4: The creative hubs across the TEPC

⁴⁵ [TEPC case for investment 2020](#)

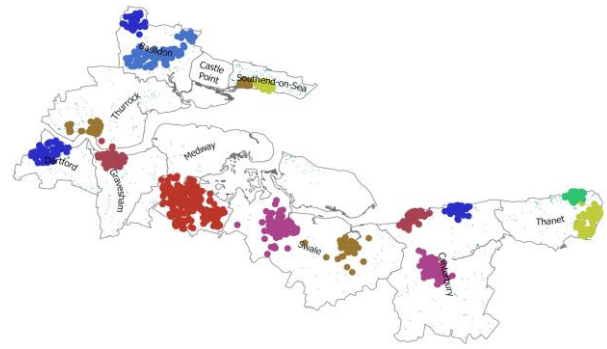


Source: TEPC case for Investment (2020)

Much of the work behind the Vision has been informed by dedicated research, and “on-the-ground” observation studies, specifically aimed at exploring the features and capabilities of the creative workspace clusters locally. As well as mapping the “cluster footprint” and key anchor institutions, this has also been important in capturing micro-clusters of creative activity and local sub-sectors and specialisms, not always in expected places and/or immediately visible. From this the 30 or so core projects have been identified (see figure 4).

Wider research conducted by the PEC reinforces the significance of micro-clusters in the region. Interestingly, this has identified 709 creative micro-clusters around the UK, with a third of these located outside of the larger, established and already recognised clusters, such as in London. This has, in particular, identified a number aligning with the sites already part of the TEPC Strategy, within North Kent and South Essex. As such, it has further demonstrated that there is greater creative and cultural capacity than captured in standard employment figures, especially in the form of freelancers and micro-businesses.

Figure 5: Creative micro-clusters in the TEPC



Source: PEC (2020) Creative Industries Radar – Note colours represent different micro clusters

A number of the clusters have demonstrated particular strengths, as well as offering future opportunities with ambitious plans for further development and investments, including through skills. Some of these are more established sites such as: Purfleet; Stratford; Poplar; Chatham and the Royal Docks. The potential of some of these areas within East London, South Essex and North Kent are illustrated briefly below to bring to life the creative opportunities and key features felt to provide important foundations for future success. In particular, it also helps to show the vital role of skills to unlocking that future potential.

- **Stratford, including the Here East and East Bank developments at Queen Elizabeth Olympic Park** ⁴⁶ has become a significant regeneration site for cultural and creative industries, as part of the East London portfolio. This has seen ongoing investments and growth across the creative cluster evident over a number of years. Here East and East Bank are examples of major developments in and around Queen Elizabeth Olympic Park, building on the opportunities created by the Olympic and

Box 3: Existing businesses based at Here East

BT Sport (which offers five linear TV channels, six interactive BT Sport Extra channels and is available on BT TV, Sky, Virgin and TalkTalk) launched its sports channels in 2013. It has three TV studios, a control centre, 24 edit suites and 9 galleries and leads the industry broadcasting from Europe’s largest LED lit studio. At its Here East site it seeks to drive innovative practices in areas such as Virtual Reality, Dolby Atmos, 4K UHD and remote production;

Studio Wayne McGregor is a creative arts space which is home for Wayne McGregor’s dance company. Studio Wayne McGregor runs a variety of programmes supporting artist development, community projects and learning engagement around the country. It comprises three dance studios, including two of the largest in London, and a series of “playful” spaces used to support creative collaborations across dance, visual art, technology and science.

⁴⁶ [Here East - Who's Here](#)

Signal Noise is a data design agency. It specialises in developing interactive digital and online products and tools to support business applications and smarter business practices which make better use of data. It has partnered with a variety of business including those working in data-rich environments such as smart cities, in finance and for Institutes of Technology.

*Sports interactive*⁴⁷ is a games developer renowned globally for its football management simulations including the Football Manager and Eastside Hockey Manager Series of games. Indeed, 12 of its products are among the UK's Top 20 fastest-selling PC games of all time and five in the UK's top 20 best-selling PC games of all time. The company was first established in 1994 and became a wholly owned subsidiary of SEGA Europe in 2006. There are now more than 170 full-time staff in the team at the Here East studio and around 1,300 part-time researchers across the globe whose research makes up the world's largest football database.

Plykea has chosen the site as the home for their new London flagship design studio, workshop and kitchen showroom space. Plykea is a company challenging the status quo of kitchen design, creating stylish cabinet fronts and worktops for clients such as IKEA.

Ford Smart Mobility which is a dedicated Smart Mobility Innovation Office in London focusing on future mobility solutions for Europe; and

LC2 the home of the Product and technology teams at Ladbrokes Coral. Working to improve the customer experience online and in the shop

MatchesFashion is a global luxury retailer for men and women, offering the work of more than 400 luxury brands like Gucci, Prada, Stella McCartney, Saint Laurent, Alexander McQueen, Burberry and Lanvin.

Source: www.hereeast.com

Paralympic Games, and the longer-standing creative, design and entrepreneurial heritage of surrounding areas such as Hackney Wick.

For example, Here East is a dedicated campus for *creative innovation*, which seeks to provide an important catalyst to further regeneration in the Cultural and Creative Industries. It operates by *bringing together global businesses and smaller start-ups and scaling companies, with creative institutions, universities, and research institutes* to create a unique environment for *experimentation, networking* and growth. It has sought to offer on one site a range of different workspaces and currently provides light industrial, studio, office and assembly space, as a basis not only to enhance the environment for existing businesses but to attract further investment and growth.

⁴⁷ [Sports Interactive Games \(sigames.com\)](http://sigames.com)

⁴⁸ [High House Production Park \(hhpp.org.uk\)](http://hhpp.org.uk)

Collaboration is central to the site's approach, as exemplified with the development of the coworking space and innovation centre – *Plexal*. This has been designed as a 'mini-city' at the heart of the development, with its own indoor park, high street and indoor street food stand. Plexal seeks to inspire innovators, disruptors, visionaries and locals to push their professional and personal boundaries through a *dedicated innovation team*. This team delivers programmes for public and private partners such as Innovate UK and Transport for London, and aims to drive improvements by encouraging *connections within the community between industry, academia, investors, start-ups and scaleups*. It also has dedicated facilities available for wider use such as the Eagle Lab funded by Barclay's which offers 3D printers and a VR/AR zone to test and prototype product solutions.

The Here East site has already attracted a mixed community of very significant creative and wider businesses to establish the *blended environment* for creativity and innovation, including tech, media, broadcasters, designers, artists and world-class cultural institutions as well as universities and research bodies (for instance see Box x):

In addition:

- **Purfleet, including the High House Production Park (HHPP)**, has become one of the most important strategic hubs for Creative Industries in the South-East, as part of South Essex. Not only does it have some important creative anchor organisations already, but it has also supported the *growth of micro-clusters, and a strong creative SME community* locally, prior to the Covid crisis. With some significant investment projects in the pipeline, local partners (eg Thurrock Council and SELEP as well as private investors) clearly intend to ensure that this growth story continues, and have set significant growth ambitions for the sector in future. The HHPP⁴⁸ has been a central part of establishing creative roots in the region for a number of years and strengthening the local skills infrastructure is key to local ambitions. The Park currently includes: the *Royal Opera House* (with its own set-building workshop⁴⁹, costume centre and historic collection); the *Acme Artist Studios*⁵⁰ (which provides a range of 39 large and smaller studios for professional visual artists. 4 units - combine a studio with ancillary living space); and the *National College for the Cultural and Creative Industries* (with the College housing *The Backstage Centre*), which

⁴⁹ ie the Bob and Tamar Manoukian Production Workshop.

⁵⁰ [Our partners | High House Production Park \(hhpp.org.uk\)](http://Our partners | High House Production Park (hhpp.org.uk))

offers specialist technical production courses to progress to further study or employment in backstage or off-stage careers).

The site therefore already houses quite a *distinct creative business and skills infrastructure*, with the UK's first-ever national centre of excellence for technical skills, crafts and artistic production, provided by the National College, existing alongside developing creative businesses and creative production activity (Further details about the National College are provided below). Given the close partnerships between the National College and wider skills institutions in the area such as South Essex College, Access Creative College and the University of Arts London, this provides access to a strong creative skills community. This covers areas in performance design, theatre and screen including performing and the productions arts. The performing and productions arts qualifications suite offers a technical pathway from Level 1 to 4 to support progression into employment or higher education in areas such as theatre design, contemporary theatre performance, acting and performance, costume for performance, hair and make-up design, creative media production and production arts for screen.

- **Poplar**, has seen significant investment to develop as a fashion district and centre for fashion technology, building on East London's traditions for fashion. A key goal is to revitalise fashion and to *develop a clear identity in clothing design, manufacture and production, and sales in the region*, fit for the future, modern economy. For instance, the Mayor of London has provided targeted investment to nurture the sector through key projects. In particular, this seeks to enhance connections and encourage stronger networking between fashion experts and specialists locally including fashion businesses, designers, manufacturers and education institutions. This funding includes support to early stage and high growth fashion businesses to grow, through a *dedicated London Fashion Fund* which enhances access to finance. Furthermore, wider project funding has been provided to extend workspace in Poplar through the *Mayor's Good Growth Fund*. One such example is Poplar Works⁵¹. This aims to enhance growth in the sector through the provision of workspace with a range of studios, workshops, and business units capable of development into manufacturing units with industry-standard fashion design & production

equipment as well as low-tech makery units for craft activity. Poplar Works is serving the needs of a wide range of clients from designers and makers such as jewellers and craft workers to experienced business owners, and first year start-ups. *Workspace is provided alongside training, and business support programmes* for fashion entrepreneurs. *Networking* is also encouraged through a cafe and gallery space for showcasing and retail activity. Poplar Works is delivered through a partnership between Poplar HARCA, London College of Fashion, UAL and The Trampery.

More generally, the cluster has also benefitted from *central funding* such as to the London College of Fashion's £6m grant through the Arts and Humanities Research Council. This seeks to enhance research, development, and innovation to support the fashion industry in the district. This initiative builds on the Mayor of London's investments in Stratford, which includes a new campus for London College of Fashion within the Queen Elizabeth Olympic Park Complex.

- **Royal Docks** present a new hub for creative *enterprise and collaboration anchored by London's Enterprise Zone*, and bespoke creative facilities such as the Silver Town heritage site - this is most well-known for being the location of iconic developments such as the Battersea Power station and the Millennium Mills. As the Royal Docks is London's *only* designated Enterprise Zone, it is an area benefiting from significant investment. As such, the Mayor of London and Newham Council have been working closely to ensure that the cultural and creative industries are a key priority of local planning and it is intended that the region will build its *identity and brand* as a *global centre* for creative industries as a result, as set out within the Mayor's recent Cultural Strategy. The area also has some important *local assets* which can support economic growth, with *London City Airport, the University of East London and the Excel exhibition centre* and hence can provide important incubator conditions for creative production. As the region is being regenerated, through different phases of industrial restructuring and decline, new purpose built studios such as those in the Silver Building and the Millennium Mills at Silver Town are being re-developed for creative activities, alongside historic venues such as the Brick Lane Music Hall.

⁵¹ www.poplarworks.co.uk

The first phase of the Silver Building which was the traditional Carlsberg Tetley building, is now complete. This provides a large multi-purpose site with 35 different sized artists' studios and shared workspaces. These are supplying facilities for a mix of businesses; from fashion designers to a big-build set company. The building also provides communal space and a café and bar which can be used for exhibitions and events. Such developments are thus already serving to enhance opportunities for many creative businesses locally. These combine with and seek to enhance wider existing sites such as Bow Arts RAW Labs (in the Royal Albert Wharf). This already provides creative arts hubs, offering flexible facilities for arts, culture and creativity through events, art classes, life drawing classes, film screenings and workshops.

- **Chatham** in North Kent is also re-emerging as a thriving heritage-led cultural hub and central creative and digital cluster within Medway, again with its *own distinct historical brand and identity*. It is becoming increasingly important as a region for supporting and encouraging broader creative industries. It's also increasingly seen as a *home to galleries and national collections of art and objects* because it has been able to exploit and enhance, its strong maritime historical roots and local assets.

"Chatham...with its own distinct heritage and historical brand and identity it is becoming increasingly important as a region...for broader Creative Industries"

For instance, Chatham's Historic Dockyard, in particular, which is managed by Chatham Historic Dockyard Trust, has been an active regeneration site for the creative economy over the last 30 years as it has preserved and re-purposed the site - the original dockyard was closed in the 1980s. The Historic Dockyard is now accommodating businesses of all sizes, from large enterprises to sole traders, especially as a *multi-use cultural and creative centre*. It currently has significant *creative anchor institutions*, with *three universities including the University of Greenwich, the University of Kent and Canterbury Christ Church University*, having come together with Mid-Kent College to create the Universities of Medway campus. This is a direct attempt to enhance the provision of specialist courses and research in the area, which includes directly supporting creative production locally, with specialist centres such as the *Institute of Cultural and Creative Industries*. Some further well-established and

distinct creative anchors include: *Dovetail Games*; a new creative centre at *Rigging House* (which has re-purposed a Grade I listed property and includes creative workspace, offices for the university of Kent, a library, archive and volunteer centre) and facilities such as *The Joiners Shop* which acts as an incubator space for a number of start-up companies. This historical building has been redeveloped to create 40 new business units which offers flexible workspace in a serviced environment, especially for the creative industries.

But, a range of further investment projects in the town itself, developed around the Dockland, has aimed to regenerate and enhance broader creative activities within the wider area. These have sought to extend creative production business-units, exhibition, performance and event space and enhance cultural and creative activities across the region and include: re-development to The Central Theatre; investment to establish more creative workspaces such as Nucleus Arts Riverside Creative Hub, Sun Pier House (which is an arts and creative complex in the High Street) and the Pop shop, allowing local artists to display and sell their work as well as running workshops and business support programmes; and a range of developments around the Chatham Waterfront.

"A key asset is the broader ecosystem which provides a vital means for creative businesses to network, exchange knowledge, innovate, access new skills and insights and regenerate"

Alongside these examples, the full range of clusters across the Estuary, are growing to therefore become more significant over time. This is not only due to the *strength of the existing creative assets, capabilities* and the talents of local individual businesses within the clusters, but the degree to which those businesses are being nurtured within the TEPC to form *a critical mass that can sustain performance, and ongoing re-development as part of a broader network and ecosystem*. In a context too, that many of the local business communities of Creative Industries include large numbers of smaller, micro-businesses and freelancers, this offers real potential for the Estuary-wide networks to organise and co-ordinate activities more effectively on behalf of individual members, working with TEPC partners in areas such as skills investment and training; thus supporting knowledge exchange and enabling things to happen that would probably not be feasible for individual businesses operating alone.

A core goal for the TEPC has already been to, recognise, amplify and extend the potential for networking, between clusters as well as within clusters, through tailored investments, and the integration of local services. Under the TEPC umbrella, these activities are supporting local creative assets and natural *partnership working*. This has been predicated on evidence-based insights of what works, which suggests that where investment and support services are able to enhance genuine creative "*communities of practice*," this can offer more long term and sustainable benefits, which are more likely to survive beyond the life of any single intervention. There are a number of examples of networks growing across the Estuary.

For instance, the *Film and audio visual* assets and studios in and around Stratford and Purfleet already have links across the Estuary into London and Maidstone in North Kent as well as connecting to creative clusters nationally and globally and bring in wider partners from the universities and industry bodies. In addition, assets within *Music and the performing and visual arts* based at High House Production Park in Purfleet have connections not only with the National College but across the Estuary with, for instance, the Performers College in Corringham South Essex, and the new creative laboratory for theatre based at Ashford in Kent (anchored to Jasmin Vardimon Dance laboratory) and the Theatre Making Centre at Bexley, which already supports national touring productions as well as in the local area. In addition, there are links provided through the *Arts community* – for instance the Acme studios are part of a network extending further into London. These are though now being further enhanced to other parts of the Creative Estuary through additional sites in South Essex and North Kent. Clearly, such developments will need ongoing support over time to enhance their sustainability. A further priority for the TEPC programme has therefore also been about ensuring it invests for the future and places a sufficient focus on *horizon scanning* and a *future-back thinking*, especially in an environment of increasing uncertainty.

Evolving the future project pipeline

Now more than ever, future planning is vital to help kickstart the local economic recovery, post Covid-19, and enhance the opportunities for the creative economy to continue its contribution to the region over the long-term. In part this is about taking ongoing and early action, working with partners and, particularly industry, to better anticipate future needs and change, and protect and grow a creative pipeline that will be "*fit for the future*".

More specifically, a key challenge has been how to maintain confidence in the region and to preserve and optimise fertile and active investment streams and services over time, that enable the creative infrastructure, in a way that can support, protect and even accelerate future creative prospects in times of change and disruption. The clusters, and the environments in which they operate in, are very dynamic. Therefore, any regional support from the TEPC programme has needed to be sensitive to and responsive to such change over time. But, equally, these are long term commitments so by their nature that brings significant risks, as well as opportunities, that will need to be regularly reviewed and proactively managed.

In the current climate, this is clearly evidenced through the effects of the present Covid-19 pandemic, which has created much economic turbulence, ambiguity, and disruption. But, more generally, we are seeing increasing economic cycles of change over time, themselves bringing opportunities as well as challenges, and threats. This is evident, with a growing number of significant economic developments in the run up to Covid-19 such as, the financial crisis of 2008, and the turbulence due to Brexit in 2016. But these events are also combining with more longer running uncertainties due to factors such as globalisation, innovation, changing policy priorities, and waves of technological, political, demographic, and climatic change. A key question is whether the TEPC project has been sufficiently reviewing and planning for such developments?

Stakeholders interviewed in the study outlined a range of additional future *planned investments and infrastructure projects*, the TEPC programme already includes. These have *aimed to sure-up the opportunities ahead for the creative economy up to 2030 and help to build an inspiring and exciting ambition*. But, of course, in such uncertain times, these plans will need to be kept under constant review to ensure future actions can continue to be supported through planning processes and there is a steady stream of investments to preserve core assets and bolster local resilience, and in turn growth prospects. A flavour of current investments in the pipeline are provided below to further illustrate the growth potential. For example:

- **The Stratford creative industries cluster** aims to benefit from wider ongoing investments. For example, East Bank is a significant future development currently supported by the Mayor of London⁵² and also part funded by the Ministry of Housing, Communities and Local Government. It is located across three sites in the Olympic Park complex, but also seeks to make strong connections

⁵² GLA (2018) Mayor of London's Culture Strategy.

to wider cultural and education centres such as those in close proximity within London. As such, a core objective is that the East Bank will complement and work closely with wider creative clusters of museums and academic institutions already well established in: South Kensington; the South Bank; and the Knowledge Quarter around King's Cross and Bloomsbury.

Box 4: East Bank Developments

- **Sadler's Wells East:** This will involve a new 550-seat theatre, a new centre for choreographic practice and a hip hop academy. This will provide a venue for presenting the best UK and international dance work.
- **UAL's London College of Fashion** will integrate its six sites onto one state-of-the-art campus. This aims to accommodate 6,500 students. The campus will bring together its research community, business incubation functions and social enterprise centre, alongside public open spaces, galleries, libraries and archives.
- **The V&A** in partnership with the Smithsonian Institution will display its world-famous collections at two sites. There will be a new museum to explore the V&A's renowned collection, which will include a curated space with pioneering exhibitions, gallery displays and spaces for community-led projects. In the north of the Park, the V&A will open a new Collection and Research Centre at Here East. In the heart of this innovation district, the V&A will revolutionise access to the museum's vast collection of art, design and performance.
- **BBC Music studios:** These will provide a new home for the BBC Symphony Orchestra, BBC Symphony Chorus, BBC singers. Its state of the art studio will host recording sessions and live performances across all genres from global stars to emerging talent. There will be access to the public for performances.
- **UCL East** This will create a new campus, providing multi-disciplinary research, teaching and innovation, in areas as diverse as robotics, smart cities, culture and conservation. aims to accommodate around 4,000 students

Source: www.queenelizabetholympicpark.co.uk/east-bank

The East Bank development aims not only to be a growing cluster for cultural and creative arts, and education but to support economic development more broadly too in the region including sectors such as technology, manufacture, retail and education. It is intended that this wider business activity will bring mutual economic and spill-over effects to the overall site, as suggested by previous research.⁵³ Given its potential, a number of partners have already committed to the project including: the BBC; Sadler's Wells; the V&A; University College London; UAL's London

College of Fashion; and the Foundation for FutureLondon London Legacy Development Corporation. Yet, this is a long-term development. Whilst work commenced in 2018, the site will not start to become operational until 2022/23. With current economic challenges around Covid-19, developments will need to be carefully managed and progress monitored in the years ahead. A multi-year infrastructure project such as this will evolve, and it will clearly be more challenging in a post-Covid-19 recovery to ensure that different parts of the project are completed and can fulfil the original goals. (Further details about the planned developments can be found in Box 4).

- **The Purfleet creative cluster** also has significant future investment plans. As Purfleet and the HHPP recover from the recent economic shocks of Covid-19, it is the intention that local plans supporting the future development of creative activities at the site can provide an important basis to kick start a post-Covid-19 recovery and growth. The aim is to cluster further specialist industry facilities for production and training in the region, building on functions already there. This will allow the cluster to become more self-sustaining. For instance, a Media Village is planned in addition to established facilities. Indeed, Thurrock Planning Committee has already approved a comprehensive £1bn mixed-use development in Purfleet and this has been supported by a range of funding including from SELEP. In addition to broader commercial, leisure and residential facilities the development includes the **Quartermaster Studios** – a high-tech independent media production facility with a film and television studio. Again, whilst this has the potential to substantially enhance broadcasting and production facilities in the region as another multi-year venture, there is still much work to ensure that this potential can be delivered.

- **Royal Docks** provide another example of a cluster site, with considerable future investment plans, and which could also significantly evolve given the areas additional special status as London's Enterprise Zone. For instance, the Silvertown development is a substantial long term, £3.5bn redevelopment project in the docklands. This includes sites of hugely significant heritage and development potential, such as the Millennium Mills. This in an area framed by the Battersea Power station as well as the Silver Building, which was the

⁵³ Nesta (2018) Creative Nation.

traditional Carlsberg Tetley building. The intention is to redevelop the area as a commercial and cultural hub and therefore it plays a crucial role in shaping the new centre for Creative Industries in the historic dockyards. But clearly too it is a big and complex project, involving multiple partners, and will need a phased and carefully managed development to ensure it fulfils its ultimate vision.

- **Dagenham Eastbrook Studios.** In November 2020 plans were approved by the London Borough of Barking and Dagenham, and the Mayor, to enhance the presence and profile of the screen industries in London, with the first major film studios to be built in London in over 25 years. With London already being acknowledged as a key hub for the film industry in the UK, this is seen as a vital investment to enhance the capital's position on the world stage in future.⁵⁴

The proposals involve the redevelopment of a 20 acre site of a former pharmaceutical company which was dissolved in 2013. It is expected to be London's largest studio campus, with plans for 12 sound stages for major TV and film production, three acres of backlot - available for external filming and set construction - broader offices and workspace and a public facing area, with a studio tour, lmax cinema and leisure, food and drink facilities. Such a significant site offers significant benefits with the studio thought likely to create around 1,200 jobs and will bring in the region of £35m for the local economy each year.⁵⁵ As such, it provides a basis too to significantly enhance the local education and skills offer supporting young people and adults in the region to pursue careers in film and tv production. The project has been able to continue to progress, despite the economic challenges created by the Covid-19 crisis. Sector bodies such as Film London and the British Film Commission have worked intensely to help the industry through the pandemic. It is currently estimated that the project is on track for filming to start in mid-2022 with the studio fully operational by 2023. But clearly too there are likely to be some significant hurdles ahead to secure this further part of the TEPC vision.

Given the long term focus, scale and complexity of the TEPC Vision, and the associated multi-level programme of work, it is aiming to influence (both direct Estuary-wide projects and wider sub-regional

projects around distinct clusters), this calls for a strong Action Plan. It's to this we now turn.

2.4 TEPC Action Plan

A TEPC Action Plan is being developed across the Estuary to manage and maintain ongoing delivery whilst embedding a strategic approach⁵⁶. As we have seen, the initial TEPC Vision has identified a portfolio of investments and project areas for immediate action and therefore these are providing an initial basis for the Action Plan. Indeed, they are currently being further developed and tested, to build potential partnerships and future concrete opportunities for funding and investment, across the private as well as the public sector. This will be essential to cement future growth of the sector across the region.

As it is expected that the projects will evolve over time, as new future investments and partnerships are formed and come on board, and activities need to adapt, it is important that this Action Plan also evolves. That said, to be effective this evolution needs to happen in a co-ordinated, as well as flexible way, to ensure efforts are combined and strategically aligned, when it matters, to create the potential to scale up and achieve a greater sum of parts. It is the intention therefore that the initial projects making up the action plan are developed into a common, "*framework for action*" led by the TEPC governance board.

Framework for action

The pan-Estuary framework has been developed to recognise activities, and hence operate, at a number of levels. As such, it *provides the basis for the region, working through multiple agencies, to co-ordinate and deliver multi-dimensional activities in a more integrated way*. On the one hand, this means that some activities are driven by common strategic policies and goals across the Estuary. On the other, the TEPC Action Plan also aims to connect to, more focused, local, grassroots programmes as well as those at a broader level; regionally (eg, South-East), nationally (eg Central Government) and internationally. As such, a pan-Estuary framework has the benefit not only of pooling, and better aligning, resources and expertise more effectively across policy and spatial areas, where missions are common, but, also allows room to keep some interventions and investments distinct. Stronger regional collaborative working can *combine efforts* and *aggregate effects*. More distinct, individual and localised work can preserve *diversity*, enable

⁵⁴ Office of the British Film Commission (2018)

⁵⁵ SQW (2017) Dagenham Film Studio Feasibility Study

⁵⁶ Thames Estuary Production Corridor: [Case for Investment](#). Hatch Regeneris, We Made That, & Tom Fleming Creative Consultancy

innovation, and protect local creativity thus supporting varying local applications.

The framework for action organises activities around three strategic objectives as outlined in the *case for investment*.⁵⁷

Figure 6: TEPC Action Areas

Action Areas	Activity
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

Source: TEPC case for investment (2020).

That is: *enabling*; *securing investment in*; and *growing* the TEPC. These are explored further in turn below:

1. **Enabling the Thames Estuary Production Corridor.** This objective focuses on activities directed at *building the foundations* or “*enabling tools*” for Estuary-wide action and supporting the conditions for overall growth across the TEPC district as well as the individual regional clusters that comprise it. Most crucially, it aims to embed a *compelling TEPC identity* across the region to attract creative businesses and investment to the region to galvanise collaboration around cultural and creative activities. This objective therefore will be centred on: creating a strong global *identifiable TEPC brand* and *communication campaign* with a community of *TEPC champions* promoting an exemplary cultural profile and programme; and *working with networks* of sector representatives from business, agencies and higher and further education, within individual clusters to build a more supportive pan-Estuary creative infrastructure. This therefore seeks to shape policies through a “pro-creative” lens, and hence tailor local “creative” services, planning and investment in creative innovation, business development and, most crucially for this study, skills. The intention is that this will provide a basis to *strengthen the capacity and capability* of the local ecosystem for innovation, knowledge exchange and talent, leadership, business development and skills.

2. **Securing Investment in the Thames Estuary Production Corridor.** Once the enabling foundations are in place attention can be given to *deploying* the creative enabling toolkit to support grassroots creative activities and projects, to build a *wide portfolio of creative investments*. The intention is to protect, embed, strengthen and grow the creative clusters across the Estuary, enhancing their local scale, effectiveness and performance – thus providing a more favourable environment for creative businesses to prosper locally. The *investment plan* can provide the “fuel” to develop, a concrete set of cross-cutting policies, through a creative lens. These can pull together resources and support, including: local planning-policy and inward investment programmes; research and innovation projects; technology adoption; and wider business and skills development services. In turn, there will also be a need to monitor, track and evaluate the effectiveness of investments and project support, sharing insights on *what works* through formative research as well as routes to better impact and self-sustainable growth within the creative clusters.

“The TEPC Vision aims to double the size of the creative production sector across the Estuary over the next 30 years, which means supporting the creation, in the region, of over 50,000 new jobs and generating a growth in economic output (GVA) of over £3.7bn per annum.⁵⁸”

In practice then, the programme intends to build a *diverse project pipeline* with a mix of investments, and hence projects, of varying scale – as already illustrated. Diverse funding streams, with private and public contributors, will reduce a dependency on any single funding source. *Larger scale investments* can support the larger cultural and creative production sites, with more significant ambitions to grow, specialise and diversify, and extend their reach regionally, nationally and globally. As these sites contain key anchor institutions, investment projects can also support associated creative clusters, distributed more widely across the Estuary, and which are linked to the larger sites through local business networks and supply chains - thus exploiting agglomeration benefits. With successes celebrated and promoted, the intention is to encourage a *virtuous cycle of future investment and growth*.

But *smaller scale, local creative and cultural projects* are no less important. The TEPC programme has already identified an array of smaller scale creative activities in a range of locations across the Estuary that it would like to develop, nurture and embed⁵⁹. Key to this is enhancing creative activities

⁵⁷ Thames Estuary Production Corridor: Case for Investment. Hatch Regeneris, We Made That, & Tom Fleming Creative Consultancy

⁵⁸ TEPC Vision

⁵⁹ See for example EW Associates (2018) Thames Estuary Production Corridor: A Framework for North Kent and South Essex.

and space, and optimising local assets within industrial estates, high streets, visitor attractions and town centres. This is especially, amongst local communities of micro-businesses, forming micro-clusters, and covers wide ranging sub-sectors including artists, photography, music production, print making, set design and fabrication.

3. Growing the Thames Estuary

The final objective recognises that the long-term success of the TEPC Vision, and hence growth of the Thames Estuary, will depend on the effectiveness of strategic leadership, local place-making, governance, and partnership working. This objective therefore seeks to ensure a number of these dimensions are met to support sustainable growth within the Action Plan.

- First, with the development of the TEPC Vision, this places a strong emphasis on the importance of *place-making* across the region. This has been sought through a clear, compelling strategy for the Estuary, which unites partners behind common shared and inspiring goals.
- Secondly, to ensure long term success, the TEPC programme encourages *partnership working*, drawing upon, and combining efforts of a wide TEPC consortium. This brings different resources, expertise and interest groups together to drive stronger Estuary-wide action, both strategically through collaborative decision-making and planning as well as on the ground. Making firm connections at multiple levels through the TEPC programme, such as central and local government, the Thames Estuary Growth Board and industry, or indeed internationally, will be one of the key factors to success and enhanced and impact.
- Thirdly, whilst *distinct individual actions* of each partner will be important, the power of place-making within the TEPC Vision is also about unlocking a *greater sum of parts*, when the individual *partners come together* behind the common goals.
- Fourthly, a robust mechanism for *governance* is being put in place to monitor, co-ordinate and oversee delivery of the Vision and associated Action Plan. This is seeking to develop clear measures of outcomes and impacts to review the programmes' effects over time.
- Finally, this recognises that future success will also depend on *strategic oversight and leadership*. That places an onus on continually looking to the horizon, not only to optimise opportunities ahead to enhance future performance, but to observe and mitigate threats and risks. It also means, at the highest level, the TEPC programme is about influencing

decision makers, growing a network of advocates, developing consortia and partnerships for future projects, and looking for long-term investment opportunities, as well as supporting existing grassroots project delivery. It also requires difficult decisions about prioritisation – that is where not to act or invest.

Current place-based investments to date

Various activities within the TEPC Action Plan have already been supported drawing on the individual resources of local partners in the region, and hence have provided vital and concrete foundations for establishing the TEPC programme and making it a reality. It is not the intention to review all of the work of local partners but to illustrate some of the creative projects across the region to highlight some of the implications for skills.

For example, the Mayor of London and the LEAP and the SELEP, as well as local authorities across the region, have deployed a number of place-based investment streams, working with the MHCLG to develop dedicated local initiatives, on the back of national programmes, thus supporting economic development regionally in the creative industries. This has drawn on a range of funds to help local areas grow and is a key dimension of unlocking the effectiveness of local action and customisation. Whilst the funds have generally supported regeneration and investment in innovation, businesses, skills and employment, they have of course also been a vital pipeline to create jobs and growth in the creative industries. These wider funding sources have evolved over time with varying shapes of Government and have included: the Regional Growth Fund (introduced in 2010); Growing Places Fund (established in 2011); and the Local Growth Fund, from 2013, supporting a range of Growth Deals since 2015 to date.

In addition, another important source of investment locally which has supported regional economic growth, including in the Thames Estuary, is European funding. The majority of EU funding in the UK has come from the European Structural and Investment (ESI) funds. These have been the EU's main instrument for embracing the levelling up agenda, driving economic development to tackle regional variations in economic performance and inequalities and hence for helping less developed regions to catch up. The bulk of UK funding via this channel comprises of 2 funds:

- **European Social Fund (ESF)** focuses on: investing in skills to help people fulfil their potential; improving employment opportunities; and promoting social inclusion. It is managed by DWP.
- **European Regional Development Fund (ERDF)**, supports regional economic development

activities to drive a high value, low carbon economy through research and innovation and business development, especially to small and medium sized enterprises. It is administered by MHCLG.

These have also been substantial funding sources to draw upon to provide more customised services to support the development and growth of the Creative Industries. For instance, the Mayor of London working with the LEAP has invested around £700m from European Funds from 2014 to 2020 to enhance economic development in London and to help Londoners access jobs and progress at work. Similarly, SELEP has been awarded over £160 million of Structural Funds from the EU over the same funding period. In future these funds will be replaced by the UK Shared Prosperity Funds.

Box 5: Future UK Shared Prosperity Fund

The Government is establishing a UK Shared Prosperity Fund (UKSPF) in 2022 to replace the European Structural and Investment funds. The UKSPF will help to level up and create opportunity across the UK for people and places. The total domestic UK-wide funding will at least match current EU receipts, which equates to around of £1.5 billion a year. A portion of the UKSPF will target places most in need across the UK, such as ex-industrial areas, deprived towns and rural and coastal communities. It will support people and communities, and encourage new opportunities through innovation and economic regeneration. Its funding profile will be set out at the next Spending Review in autumn 2021. The government will develop a UK-wide framework for investment in places receiving funding and prioritising:

- **investment in people** and skills tailored to local needs, such as work-based training, supplementing and tailoring national programmes (e.g. the Adult Education Budget); and other local support (e.g. for early years)
- **investment in communities and place** including cultural and sporting facilities, civic, green and rural infrastructure, community-owned assets, neighbourhood and housing improvements, town centre and transport improvements and digital connectivity
- **investment for local business** including to support innovation, green and tech adoption, tailored to local needs.

Places receiving funding will be asked to agree specific outcomes to target within the UK-wide framework. They will then develop investment proposals to be approved by the government among a representative stakeholder group. Investment should be aligned with the government's clean growth and net zero objectives. A second portion of the UKSPF will be targeted differently: to people most in need through bespoke employment and skills programmes that are tailored to local need. This will support improved employment outcomes for those in and out of work in specific cohorts of people who face labour market barriers. To help preparations towards the UKSPF the Government is launching a Community Renewal Fund in 2021 worth £220m. This aims to encourage pilots to

test and trial initiatives in preparation for the UKSPF when it launches in 2022.

Source: [HMT \(2020\) Spending Review 2020](#)

Given these funding streams, significant commitments have already been secured within different parts of the Estuary, backing projects and activities within the Creative Industries. Indeed, in 2020, it was estimated that over £200m has already been invested, over the last decade, in large scale creative production facilities, within the Thames Estuary⁶⁰ in around 150 creative-led focused projects. This was raised by various stakeholders interviewed. Again, it is not the intention of this study to review them all here. But it is possible to get a sense of what's been supported in the past and hence what provides fertile areas for action with the new regional funds (such as the UKSPF) moving forward, in turn highlighting future priorities for skills.

Further details of these past investments can be illustrated nevertheless, not only through the economic strategies of local partners such as the Mayor of London and LEAP and the SELEP but dedicated cultural strategies of local partners in the region such as the local authorities. These activities are all contributing to the TEPC work programme in very specific and concrete ways, and hence provide important foundations on which to build.

London's Creative and Cultural activities

The Mayor of London has established a dedicated *Cultural Infrastructure Plan* and has invested in a number of cultural and creative projects ranging from the *inaugural London Borough of Culture* to setting up a *Creative Land Trust* and establishing dedicated *Creative Enterprise Zones* across the city, with skills activities at their heart. Of course, whilst generally focusing London-wide, they will have also influenced the East London parts of the Estuary too, and the spillover benefits have been highlighted by some stakeholders. The Cultural Infrastructure Plan is being used as an active mechanism to enhance planning and policy decisions through a creative lens across the capital. More specifically, within different parts of London, it aims to: protect diverse cultural places; create more affordable, creative workspace; enhance creative production in communities for economic growth and social inclusion benefits; and encourage partners operating in London, such as the various local authorities, landlords, landowners and developers, to produce pro-culture policies and local plans. This aims to sustain the cultural infrastructure and more proactively consider and strengthen cultural activities in the city.

As such, the Plan has already initiated a mapping of the capital's cultural assets⁶¹ which has enabled

⁶⁰ Thames Estuary Production Corridor: [Case for Investment](#). Hatch Regeneris, We Made That, & Tom Fleming Creative Consultancy

⁶¹ [Cultural Infrastructure Map | London City Hall](#)

local authorities to track cultural facilities in their boroughs more effectively, to identify clusters and trends and indicate 'cultural activities at risk'. A range of strengthened pro-culture policies that have been developed include: a dedicated '*Agent of Change*' policy to protect late night venues, with *Supplementary Planning Guidance on culture and the night-time economy*; planning protections for pubs and creative workspace; a specific *Culture at Risk office* to preserve and safeguard well-liked places vulnerable to closure and hence being lost. Through this office the Mayor has been able to fund at-risk venues through *Crowdfund London* and the *Good Growth Fund* and has helped over 300 spaces such as the Electric Ballroom and the 100 Club. The Mayor has also stimulated wider investment and programmes to embed culture in new places. This is seen with projects such as the East Bank development in Stratford and the Museum of London's move to West Smithfields.

Through specific initiatives, such as the independent *Creative Land Trust*, the Mayor is supporting the expansion of available and rentable property to secure more long-term affordable creative workspace. With rising rents in London, and a shortage of buildings owned by freehold, which generally offers more long term security, there is growing shortage in accommodation for creative small businesses and practitioners, artists, designers and craft makers. Drawing lessons from international good practice such as a model in San Francisco, the Trust raises capital to acquire property which can then be offered as affordable workspace for the creative community.

Another ambitious new project that is seeking to advance cultural and creative opportunities across London, and including East London, is seen with the Creative Enterprise Zones (CEZ). These are emerging hubs of creative activities, which are being formally recognised as *clusters of creative production* in different parts of the city⁶² (see box x) and awarded additional funding to build local creative capacity.

Box 6: London's Creative Enterprise Zones

- **Croydon: Croydon Creatives** – this seeks to develop a 'music city' and encourage young people into creative careers.
- **Haringey: Made by Tottenham** is focusing on supporting fashion and furniture manufacturing. South Tottenham has a particularly strong cluster of fashion businesses and small-scale manufacturing, which the CEZ initiative aims to grow.
- **Hounslow: Great West Creatives** – is working with local creative and digital companies including multi-national local businesses to boost opportunities.

- **Lambeth: Brixton** – is creating affordable workspace to support creative entrepreneurs and talent.
- **Lewisham: SHAPES Lewisham** (Deptford and New Cross) – is focusing on enhancing the range of affordable space to retain graduates and grow creative businesses.
- **Tower Hamlets and Hackney:** Hackney Wick and Fish Island – is supporting training and accommodation for its local artistic hub.

Source: [Creative Enterprise Zones | London City Hall](#)

The CEZ aims to provide long term support so that artists and creative businesses can become more established, and their businesses can grow. In December 2018, six boroughs were awarded a share of £11 million to develop local plans to improve the creative infrastructure, offer more permanent, affordable workspace and a range of targeted services. These include business and skills development, business rates relief, and enhanced digital connectivity. The boroughs are being encouraged to deliver their plans collaboratively through local networks and associations, involving creative businesses, practitioners and artists working with local community groups, developers, workspace providers, and education institutions. It is the intention that public funds can serve to leverage private funds with estimates suggesting aspirational sums of more than £30 million in total.

As illustrated in Box x, each CEZ has developed ambitious local plans to preserve and grow each zone's own distinct focus, thus meeting specific local requirements. Two, vitally, cover parts of the Estuary and hence can contribute to the TEPC. The Hackney Wick and Fish Island CEZ, within Tower Hamlets in East London, will play a key role, further strengthening links in and around the already established creative cluster in Stratford, with the developments at the Queen Elizabeth Olympic Park such as Here East and East Bank. The Deptford and New Cross CEZ within Lewisham, can support evolving creative specialisms locally, such as Goldsmith's focus on augmented reality. As developments grow, there is interest in extending the initiative elsewhere within the Estuary, beyond London.

In addition, there is also further concrete action around skills taking place in London, which can offer benefits for the wider TEPC programme moving forward. For instance, following devolution of skills funding to London, such as the Adult Education Budget (from 2019-20 academic year), the Mayor has been able to start to explore how and where to make changes to national adult skills programmes locally to see if they can more closely meet the needs of the London economy, such as the cultural and creative industries. The funds offer much

⁶² GLA (2018) Culture for all Londoners: Mayor of London's Culture Strategy. [2018_culture_strategy_final_0.pdf \(london.gov.uk\)](#)

potential as a concrete step towards increasing local flexibility and responding to local objectives. The London plans have identified sectors of strategic significance locally, including within the creative economy, as evident in the TEPC vision. There is thus work locally to start to provide the basis to agree local funding priorities with partners for the long term for the capital – see for example the Skills for Londoners Framework.⁶³ In addition, new tools such as the *employment and skills knowledge hub* have been created to make labour market information about careers, skills and learning opportunities in the area more readily accessible to employers and individual learners.⁶⁴ Some of this initial work is still high level and at a formative stage but it sets important foundations on which to build for the TEPC vision.

Box 7: Tower Hamlets and Hackney CEZ

Hackney Wick and Fish Island is a developing creative community in East London, with around 250 artist studios and 400 creative businesses. It is tackling one of the challenges for the area – that is to protect affordable workspace and ensure that its benefits are felt by local businesses. It also aims to support inclusion in the local community through the development and delivery of projects that support employment and training, protect, and enhance the creative ecosystem and widen community access. Plans for the Hackney Wick and Fish Island Creative Enterprise Zone include:

- Ensuring that planning powers help develop a pipeline of affordable workspace in the area in future.
- Working with the borough employment services to help local people develop skills and provide training opportunities and internships in the cultural, creative, digital and tech sectors.
- Developing a Good Growth service for employers offering easy access to apprenticeships, internships and tailored business support.
- Boosting capacity among grassroots organisations through inclusive networks with strategic stakeholders to ensure long-term local ownership of the Zone.

Source: [Creative Enterprise Zones | London City Hall](#)

Creative and cultural activities in the South East

As we saw earlier SELEP too has developed a creative and cultural vision for the South-East, which has also been important in establishing the foundations of the TEPC programme, in North Kent and South Essex. This has been developed working in partnership with local authorities, creative businesses, and education institutes as part of the SECEN.

Through this vision,⁶⁵ the Network has already progressed a number of bespoke cultural and creative projects, too, ranging from: the *London*

South East Creative Sector Workspace Initiative; to dedicated business support such as the *South East Creative, Cultural and Digital Sector Project* (SECCADS); and specific education and skills projects such as the *Talent Accelerator* – aiming to strengthen the future talent pipeline for the creative industries, by preserving participation in Arts and other creative subjects in different parts of the education system (ie sufficient take up in “STEAM” education). These will undoubtedly offer insights and experience on which to build future activities for the TEPC.

For example, in the context of rising rents in London, the SECEN has sought to act through the workspace strategy to ensure that fit-for-purpose and affordable creative workspace is available across the SELEP area. This seeks not only to encourage the relocation of creative practitioners and businesses, but to protect those new businesses emerging locally. Additionally, it has also sought to ensure accommodation is modern, with good digital connections and is fit for use by all types of businesses, including micro-businesses and freelancers. With a focus as well on establishing and growing workspace within CEZs and creative hubs with a more supportive cultural infrastructure, that encourages knowledge exchange, the aim is also to enhance local creative capacity, and to support scaling up and hence growth of creative industries more widely in the region.

In turn, SECEN has taken action to develop a bespoke business support package locally for businesses within creative clusters in the area - SECCADS. With the project being funded through European funding and delivered in partnership between Thurrock Council, Kent County Council, East Sussex County Council, Essex County Council, Southend-on-Sea Borough Council, Colchester Borough Council, Medway Council and University of Essex, it has been possible to amplify and align with existing business offers delivered through local business networks and Growth Hub throughout Essex and Kent. The programme has aimed to encourage business and skills development and innovation through a range of activities including: business diagnostics and advice from Creative Industries' specialists; mentoring and workshops; job brokerage, internship and placement support; and grant funding. Schemes such as this have thus provided vital experience on which to build future tailored activities and investment in the TEPC.

Interventions in business development have taken place hand in hand with skills programmes. The Talent Accelerator⁶⁶ has been designed as an

⁶³ [Date \(london.gov.uk\)](#)

⁶⁴ [Skills and Employment Hub | London City Hall](#)

⁶⁵ [SE Prospectus Low Res \(1\).pdf \(southeastlep.com\)](#)

⁶⁶ [Talent Accelerator](#)

education-to-workplace programme. This seeks to: ensure effective progression routes into the Creative Industries from education; tackle skills shortages; and grow the future talent pipeline as businesses grow. It has involved working with the sector skills body, Creative and Cultural Skills, and the National Academy for Skills and Training for the UK's Creative and Cultural industries. By establishing a network of local Cultural Education Partnerships within the South-East LEP region, it has worked to bring together and co-ordinate, for the Creative Industries, what is on offer in terms of high quality provision of education, Apprenticeships, traineeships, and skills development programmes, expert careers advice, and work experience. A particular focus has aimed to enhance project-based learning and structured work inspiration and work experience activities for young people, through partnerships with creative, cultural and digital businesses.

In addition, there have also been opportunities to embed and extend activities within the TEPC Action Plan, drawing on sectoral funding such as through the Industrial Strategy Funds. The Creative Industries Sector Deal has provided one recent example, which has been able to build on work in the parts of the Estuary covered by SE-LEP.

Current sector-based funding commitments - Creative Estuary Programme

The TEPC Vision has secured vital Government backing, through specific commitments attached to its Creative Industries Sector Deal – launched in 2018. Indeed, the Estuary has received funding as part of the £20 million Cultural Development Fund (CDF), established by DCMS, to drive future growth in culture, heritage and the creative industries in five local areas within England. Funding of £4.3 million has been awarded to North Kent and South Essex, leading the establishment of Creative Estuary⁶⁷ to bolster the programme within Kent and Essex. This latest CDF award therefore provides another vital means for partners within the Thames Estuary to build on these broader TEPC foundations and add value to the broader the TEPC Vision.

Creative Estuary is being led by the University of Kent but will be working in partnership with the already well established SECEN. The funding aims to be used to launch the first phase of plans to turn North Kent and South Essex into a world-leader for the cultural and creative industries. This is supporting several projects (see Box 8)

Creative Estuary has developed its own skills and employment outcomes, and programme of evaluation to learn lessons from its actions. This

programme will seek to make a significant contribution to the TEPC Vision, in its own right. Indeed, the current outcomes aim to support:

- the creation of approximately **500 creative industry jobs**;
- **new workspaces in creative clusters** such as Margate, Medway and Southend-on-Sea;
- **skills training for over 200 local people; 60 apprenticeships** opened to young people from disadvantaged backgrounds; and
- **to increase opportunities for people to engage with world class artists** nationally and globally.

Box 8: Planned #CreativeEstuary activity

Between 2019-23, #CreativeEstuary activity will include:

- **Place brand & promotion:** This seeks to follow the lead of other international culture-rich cities and regions, and to create a standout brand and identity for the Estuary to position it as one of the world's leading creative hubs. A core aim is to work with partners across the region to capture and celebrate its unique identity in a way that inspires excitement, ambition and emphasises opportunities.
- **Creative Asset Development:** This will work with a mix of stakeholders to develop a strategic model to provide more spaces for cultural production over the long term. It will achieve this by identifying and transforming underused buildings for the Creative & Cultural Industries' (CCI) use, while continuing to support existing and planned cultural infrastructure. Two pilot projects one at high house production park and one at the docking station are testing the model.
- **Estuary festival:** This involves the establishment of an *international arts festival* to include new commissions in locations and communities across the Thames Estuary. The festival will include installations, exhibitions, large scale events with an accompanying film and talks programme. The festival launched in 2016 with 55 events from 265 artists, reaching more than 100,000 people. Its second edition will take place Spring 2021 – Estuary 2021
- **Corridor Commissions:** Over the next two years, Creative Estuary Co-commissions will support a range of cultural projects with new commissions for Estuary-based producers and artists, from small-scale activity to large scale commissions with a diverse mix of partners. It aims to give artists, organisations or creative practitioners who have reached a critical moment in their development access to new support channels to help them realise their creative potential. Support will include access to funding, new partnerships, training and development opportunities. Critically, it intends to strengthen the Estuary's cultural network by linking creatives with others working in a similar way, inviting greater collaboration and knowledge sharing.⁶⁸

⁶⁷ [Creative Estuary | A good place for making](#)

⁶⁸ 4 commission currently supported can be found [here](#)

- **Cultural re-location.** This aims to extend cultural practices testing the co-location cultural facilities within planned civic infrastructure. This will facilitate wider places for creative activity by exploring opportunities to integrate cultural facilities and other uses into civic buildings and outdoor spaces. There are three elements to the project overall; two pilots projects, one in Ebbsfleet and one in Purfleet and a programme of learning, sharing and influencing with the aim of long-term impact for the delivery of sustainable cultural infrastructure.
- **Re: Generation 2031:** This project aims to take an innovative approach to developing the creative skills of young people aged 16 to 25 years in disadvantaged areas of North Kent and South Essex, by giving them new access to training, mentoring and aspirational opportunities. It seeks to deliver sector-led training and to create job opportunities for 60 young people from the Estuary's disadvantaged areas to work. It aims to empower more young people to access creative careers and develop the skills they need to lead new commissions, produce events, create the jobs of the future and make the Estuary a creative production hub. The project will tackle the challenges faced by small businesses and creative freelancers in terms of capacity and financial support.
- **Estuary Producers Network:** The EPN connects creative producers working across the creative industries in Essex and Kent. This offers an inclusive platform for producers from diverse professional contexts to share practice, opportunities and challenges, and develop links with potential collaborators and new partners. It aims to provide a space for dialogue and exchange, championing an ethos of collegiality and co-operation. Estuary producers are innovators and instigators, and a key aim of the network is to increase visibility for producers and producing activities within the region.
- **Ideas Labs:** This intends to draw on the expertise of local universities, technologists, creative businesses, entrepreneurs, cultural professionals and creative experts to ensure the Estuary grows as a forward-thinking and innovative production hub. A series of *Ideas Labs*, taking place in Essex and Kent, will bring together individuals and groups who would not usually find other opportunities to interact, share knowledge and explore culture-led

solutions to contemporary issues across the Estuary. These facilitated events, will: have unique themes to stimulate collaborative ideas; generate new fundable projects for commission; meet challenges facing the industries and/or workforce; and consider ways to enhance the environment and wellbeing of those living, working and visiting the Estuary.

Source: [Creative Estuary 2020](#)

A basis to support stronger skills activities?

As we have seen, given that the quality of the creative workforce is a significant factor in the success of creative regional clusters, skills have become a core part of the TEPC Vision, and the "enabling toolkit" in the associated Action Plan. Whilst the skills strategies for the region developed by the Mayor of London, the SE-LEP and wider local authorities, have sought to strengthen the operation of the local skills system overall, building on national initiatives, the TEPC project has become focused on what additional activities can really improve skills practices specifically for the Creative Industries. This starts to get to the heart of the study – that is *where to tailor skills and employment programmes to meet the distinct needs of the Creative Industries locally, as a priority sector, more effectively.*

A key objective of this research therefore has been to examine **what is distinct about the local creative skills offer in the Estuary and where specialist creative areas have developed.** This has required a focus on the post-16 education and skills system across the Estuary, and its associated local infrastructure, to then consider its creative distinctiveness. It's to this we now turn.

Key takeaways

The research has sought to understand *the rationale for a dedicated creative industries strategy in the region* by examining the nature of the creative industries footprint within the Thames Estuary economy, and in turn how this has shaped the TEPC Vision and Action Plan.

The Thames Estuary has had a relatively strong labour market in recent times, which has provided important foundations for developing the creative economy. Prior to the pandemic, economic activity rates in nearly all local authority areas were close to or higher than the national average (79%). Although there are parts of the Estuary in the top 30% most deprived areas nationally, overall, the region presented a highly viable workforce.

The creative industries has been a success story nationally over the last decade, growing faster than the economy as a whole in employment as well as economic terms, and this offered much potential for the Estuary too. The size of *the creative industries sector was on a par with the national position, with a total share at around 6% of the local economy, and had exhibited significant growth* - business growth +27% and employment +11%.

Several sub-sectors had significant presence across the Estuary and hence offered much future potential for growth, including *IT, Software & Computer Services subsector - by far the largest and most specialised* in the Estuary - *Film, TV, Video, Radio & Photography; Architecture; Advertising & Marketing; Music, performing and visual arts; Design; and Museums, libraries & galleries.*

The TEPC Vision has aimed to unlock *long term, transformational, culture-led improvements* across East London, North Kent, and South Essex. First led by the Mayor of London and the LEAP, the SELEP and the SECEN, the Thames Estuary Partnership seeks to bring together and amplify the work of wider local partners.

The Vision has drawn on national and international best practice to understand what factors *shape the local infrastructure to create the best conditions for success in driving growth in creative regional clusters*. This referenced five core factors for success:

1. **A long-term shared vision** – driving an ambitious programme of investments, centred around 30 creative sites, inspired by research & good practice, nationally and internationally
2. **An asset-based approach** supported through smart specialisation, building on local heritage, past regional strengths, existing traditions, customs & practices
3. **A cross-cutting & multi-dimensional framework** unlocking multiple, tiered investments and policy tools, customised sub-regionally and sub-sectorally
4. **Multi-stakeholder partnerships** – to support the pooling of resources, collaboration and co-creation to create a greater sum of parts
5. **Sector specific programmes** : a range of sub-regional sector projects supplemented with, dedicated Estuary-wide projects too to add value for the region as a whole (eg Creative Estuary)

3. The local skills system in the Estuary

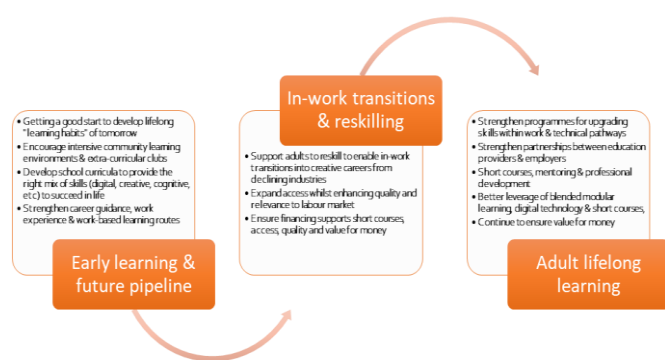
3.1 Introduction

The research has looked more closely at the post-16 education and skills system across the Estuary, and its associated local infrastructure. This has provided the basis to then consider the strengths and distinctiveness of the skills offer in the area and opportunities and challenges for the TEPC strategy in optimising growth through skills.

3.2 Current local skills priorities

The TEPC Vision and Action Plan seeks to stimulate and co-ordinate pan-Estuary skills activities for the Creative Industries through an over-arching **creative skills strategy** – at the time of the study this was under-development. According to local stakeholders, this seeks to build on the foundations of the separate skills strategies locally for London⁶⁹ and the South-East⁷⁰, as well as the local authorities skills plans, and therefore existing priorities, by pulling together the creative skills offer locally⁷¹, across different education and skills pathways. Its intention is to enhance the relevance of that offer and create a more **integrated and employer-led creative education and skills infrastructure** for the region in future – operating across schools, colleges, and universities through further and higher education and into work-based pathways. Importantly, with this will come aspirations for high quality, industry relevance and responsiveness to changing employer needs, to better support individuals to get in and get on in the labour market.

Figure 7: All age skills & lifelong learning strategy



The Vision sets out high aspirations for the local skills system across the Estuary, supporting the creative economy, and building on existing skills objectives developed across East London, North Kent and South Essex. This gives a sense of the core principles local partners see as essential components to delivering an effective skills system across the region. So, not only is it reported to be important to secure a strong **future talent pipeline** into the sector,

attracting young people, but to ongoing professional development, **lifelong learning and the reskilling** of adults already in work. As such, there is a recognition of a need to support **in-work transitions**. That is, that some of these adults may need to repurpose their careers towards the creative economy from other areas, alongside industrial restructuring. Consequently, a key future priority is to enable people to keep a foothold in the labour market and progress. In support of this, there are explicit commitments within the TEPC Vision to **encourage greater diversity** in the creative workforce and to **enhance inclusiveness**, maximising opportunities for people from a wide range of backgrounds and experience. As such, the Vision consciously embraces the Levelling Up agenda and goals to enhance social prosperity. This, in turn, places an emphasis on **high quality all age careers information**, promoting current and future careers.

Relatedly, there is also a renewed focus on **partnerships**. This is not only between education providers, collaborating within different parts of the skills system, and local leaders in other local public, private and civic institutions but partnerships with employers. In particular, stakeholders have reported that the development of the Vision has highlighted the importance of new ways of working within the local skills ecosystem including with industry, that will be vital to strengthen the co-ordination of strategic thinking on skills in future, as well as delivery. These partnerships will be crucial to enabling the sharing of good practice about what works and ensuring local skills programmes deliver their strategic goals – that is they are high quality, and sufficiently **responsive to employers' changing local needs**. A further priority emphasised here relates too to the collection and deployment of **high quality intelligence** to inform those partnerships.

Furthermore, as well as focusing on the means to enhance supply, the Vision and Action Plan additionally references the role that universities and research-focused institutes in the region, can play shaping business and employer practices and skills demand, through **stronger research and development (R&D) partnerships** and industry engagement as well as skills development. Indeed, it is recognised that investment in R&D and innovation can bring many wider benefits to creative regional clusters enabling: industry specialisation; the generation of new ideas; improvements in business and working practices; evolving skills and learning activities, and thus allow customising of skills programmes to support a pipeline of highly skilled talent. It is therefore also acknowledged that there can be significant skills advantages to creating a virtuous circle of creative innovation, industry improvements and in turn talent

⁶⁹ Skills for Londoners Framework 2021

⁷⁰ SELEP Skills Strategy 2018-23 and the SELEP Skills Report, March 2021

⁷¹ For example, initial work has started developing a Higher Education and Further Education prospectus with a focus on creative and cultural production activities.

development. Clearly, *this is a crucial cycle in driving improvements locally, stimulating skills demand as well as supply, and hence, growth across the TEPC through skills*. As such, the research study also has an interest in the interrelationship between business and skills development and the degree to which action on both fronts is sufficiently “employer-led”.

3.3 Current skills landscape in the Thames Estuary

The local authorities across the Estuary have been working to enhance their networks of schools, colleges, universities and education and training providers generally as well as in terms of creative education. An increasing priority, in particular, as we have seen, in a dynamic future world of work has been to champion lifelong learning for all ages and abilities. This has required, therefore, specific attention on post-secondary provision across the Estuary, from schools through to adult training and has become a key focus of the study.

Research for the TEPC Vision⁷² drew attention to some important core features in the local skills system. This pointed to a well-established and **recognised baseline infrastructure in post-16 creative education**, operating across the region, and providing vital steps through further and higher education pathways and into work.

This had evolved over time to form an **experienced local skills ecosystem**, supporting greater specialism in a range of local skills institutions. This has involved a network of around 120 post-16 schools, 50 further education colleges, 13 universities and 30 independent training providers. Whilst the network extends across all local authority areas within in the Estuary, the density of colleges is greater in the London boroughs where the population density is greater. In addition, stakeholders mentioned that there are also a significant number of private providers⁷³ offering training to those in the region. These have tended to specialise in technical further education. Indeed, on average over 60 per cent of training and Apprenticeships starts are carried out by independent providers⁷⁴. With the Government currently going through a process of re-registering technical education providers, this is expected to be a growing community – but there will not be clarity around this until the new register is launched later in 2021.

Collectively, these education institutions have been delivering a broad variety of creative and cultural courses up to degree and higher degree level to

form well-established creative education routes.

These cover the entire education pathway for young people (16-18) and adults (19+). The courses range from traditional arts-related subjects (eg Art and design, Drama, Music and Media Studies) in well-known, long-running academic pathways (eg A'Levels) to more vocational and bespoke courses that seek to provide technical knowledge and practical skills demanded by employers in the Creative Industries (eg often termed applied general). These include areas such as: the Performing arts, covering music and drama; Fine art; areas of art and design including Fashion, many craft areas and Graphic design; Games Development and 3D Product Design; and Music Technology.

Routes to university provide a dominant pathway for the creative sector. This is reflected in the fact that the UK has one of the highest proportions of people in the economy with degrees and higher degrees than many OECD countries⁷⁵, which equates, as we saw earlier, to 71% of the Creative Industries workforce on average also qualified to this level. Of course, not all the creative workforce in the Estuary will have been educated locally in every stage of their education pathway. But, with a significant proportion of students being loyal⁷⁶ to their home areas and wanting to live, work and study where they grew up (45%), closely followed by returners (24%), who move away to study initially but then move back home to work and study, *it is important that the TEPC has a strong local creative education offer for all ages, in all parts of the education and skills system to attract and retain learners and hence skilled workers*. This helps to ensure that when people are living and/or working in the region they can access creative education and training and be ensured of the highest quality experience.

The region had also grown **a network of specialist creative centres of excellence and customised sector specific programmes**. For instance, there is an important range of specialist creative provision and training in the further education colleges, ITPs and higher education institutions (HEIs), serving creative industry needs within the Estuary, which offers much potential in the region in terms of growing the creative workforce locally. Stakeholders interviewed for the study felt that the ITPs and further education colleges together have built a strong reputation for traditional academic and more technical and Applied General courses which are providing important routes into further creative study and training as well as creative employment. ITPs were

⁷² Thames Estuary Production Corridor: Case for Investment. Hatch Regeneris, We Made That, & Tom Fleming Creative Consultancy

⁷³ [For example, there are around 1000 ITPs on the Government's register across the country but only currently 91 Apprenticeship Levy Training Providers who specialise in Creative, media & the arts, with 20 in London and 8 in the South East.](#)

⁷⁴ [AELP \(2019\) Key facts.](#)

⁷⁵ [BEIS \(2017\) Industrial Strategy: building a Britain for the Future](#)

⁷⁶ [Industrial Strategy Council \(2020\) Universities, Colleges and the Industrial Strategy](#)

not just restricted to the region and captured providers such as Access Creative College, Big Creative Education, All Spring Media and the Bauer Academy. These supported the local colleges such as: South Essex College, New City College Group which includes Havering College, Lewisham College) Barking and Dagenham College, North Kent College; Mid-Kent College in Medway; and the EKC group of 6 colleges also within Kent (which includes colleges such as Canterbury and Ashford). Strong partnerships have been able to develop creative specialisms over time, with colleges also drawing on technical expertise of awarding bodies such as UAL, BTEC, OCR and City and Guilds, as well as partnerships with HEIs and business communities.

Further, there are wider creative *specialist institutes* recognised within the higher education sector, which have built a stronger reputation for customising programmes to meet industry needs and hence to enhance relevance and value. Whilst many of these are not within the Thames Estuary, given their proximity to the region and connections to London, clearly they will also provide an important dimension to the local skills system serving the Creative Industries. These include institutions such as: Courtauld Institute of Art; The University for the Creative Arts; Guildhall School of Music and Drama; Norwich University of the Arts; RADA; The Royal Central School of Speech and Drama; Royal College of Art; Royal College of Music; London Academy of Music and Dramatic Art; Ravensbourne; Trinity Laban Conservatoire of Music and Dance; and the University of the Arts London.

Furthermore, a number in the region have also achieved recognised status as wider *specialist creative centres of excellence*. For instance, the *BFI Film Academy* is delivered in London and Kent. Some parts of the Creatives Industries already have accreditation schemes, which can provide a creative industries-wide model on which to build more widely. One such example is the *ScreenSkills' Select Programme*, which endorses and enhances screen courses that are known to develop industry-ready students.⁷⁷ Another example was provided by the *Arts Council England Education Programme*, which delivers a number of recognised industry and creative education initiatives in local communities, co-ordinated through its "bridge organisations" – in London this role is provided by A New Direction and in the South-East, by Arts Works. In addition, there were a multitude of wider skills initiatives often co-designed and delivered with local skills and development agencies such as Screen South, deploying a range of local and sectoral funds.

⁷⁷ Further details of the Select Programme are [here](#)

⁷⁸ As of 1 October 2019, 48 UTCs were open across England with 14,067 students. A total of 58 UTCs have opened since the first in

Furthermore, there are *wider publicly funded specialist providers serving the needs of the creative sector*. The research has sought to explore these specialist institutions in more depth to understand the distinctiveness they bring to the local skills system relative to other parts of the skills system in England.

University Technical Colleges

The Government has funded University Technical Colleges (UTCs, see Box 9) since 2010 for those aged from 14 to 19.

Box 9: University Technical Colleges

University technical colleges (UTCs)⁷⁸ are publicly funded state schools, independent of local authorities in England that focus on teaching students who are mainly aged 14 to 19. They were established to enhance progression pathways into key technical growth sectors in the economy, thus strengthening the talent pipeline, especially in technical STEM and creative subjects but they do also include creative areas. They work alongside employers and universities to deliver technical education and offer a distinctively different educational choice from other schools. The curriculum provides a blend of academic and technical learning with a strong grounding in the core subjects of English, Maths and Science, combined with technical specialisms and creative thinking linked to local industry partners (at least 40% of the time). UTC specialisms include:

- Digital Technologies, including design and digital media
- Engineering
- Cyber Security
- Manufacturing
- Working in construction and the built environment
- Health Sciences.

The first UTC, The JCB Academy in Staffordshire, opened in 2010/11. Each UTC must be part of an academy trust, a charitable company that manages the school's budget and employs the staff. Academy trusts are directly funded by, and accountable to, the Department for Education (the Department), via the Education and Skills Funding Agency. Single-academy trusts have one academy school, while multi-academy trusts (MATs) bring together groups of academy schools. Since 2017 UTCs have been encouraged to form MAT to enhance their financial viability. From the financial year 2010/11 to 2018/19, the DfE spent £792 million on the UTC programme, in addition to the per pupil funding that UTCs and other schools receive. In 2018/19, 52% of UTC students achieved a Grade 4 or above (broadly comparable to A*-C grades) in English and Maths GCSEs, compared to 66% nationally in state funded mainstream schools.

Source: UTC Home | University Technical Colleges (utcolleges.org)

September 2011, but 10 have subsequently closed. 17 UTCs were open by 2013/14, 37 by 2015/16, and 49 by 2017/18. Source [here](#)

Their objective is to strengthen early pathways into technical areas such as STEM and the Creative Industries, supporting specialisms such as digital technologies, design, digital media and creative thinking. A number of these have been operating in and around the Thames Estuary, including the Global Academy, which is partnered with the University of Arts; London Design and Engineering; BMAT UTC, and Waterfront UTC at Chatham.

Whilst, the UTCs generally as a policy initiative have not progressed as was intended, and in particular, have had ongoing challenges around the level of student occupancy and financial viability, the Government did commit to a three-year improvement programme in 2017. As such, there is ongoing support for them locally. It is also expected that they remain a continuing dimension of the local TEPC strategy, as the DfE is reviewing their future vision as part of the forthcoming spending review in 2021 to improve their long-term sustainability.

National Colleges for the Creative Industries

Another key feature of the Estuary local creative skills infrastructure is the *National College for the Creative and Cultural Industries* at the regional creative cluster around the High House Production Park in Purfleet, South Essex. The Government provided additional funding to support the creation of new technical National Colleges and Institutes as one mechanism to enhance technical education in 2016. The National College for the Creative industries (NCCI) is one of only five National Colleges in the country and is currently run by partnership between South Essex further education college and Access Creative College (ACC).⁷⁹ This is also within close proximity to the *National College for Digital Skills* (NCDS) largely serving the needs of the digital and ICT sector, principally providing technical training in computer science and creative digital media for those seeking professional digital and computing careers⁸⁰.

Whilst the current joint venture partnership, for the the NCCI, between South Essex College and ACC, was not set up until 2020, the NCCI has been operating for a longer period, being first established by employers in 2016. As such, the NCCI has put in place strong foundations for developing and delivering industry-led provision locally and has already acquired significant experience on which to build in future. The original aims were to provide technical classroom-based and work-based education in a range of backstage, off-stage and

other creative and cultural industry areas. In particular, it supported employers in the performing arts such as the Royal Opera House, The National Theatre, White Light, LiveNation, O2 Academy, the Arts Council England and many more.

The NCCI was set up with a range of over 30 industry partners to help support development of the education and training functions and hence ensure the quality and relevance of curriculum development. These have included employers such

Box 10: National Colleges Programme

In 2016 the Government established five employer-led National Colleges. These were intended to meet the shortfall of higher-level technical skills in key growth sectors and critical infrastructure projects. The sectors include: Creative and Cultural (NCCI); Digital (Ada); Nuclear (NCfN); High Speed Rail (NCHSR); and Oil and Gas. The Colleges have aimed to deliver classroom-based and work-based (eg apprenticeship) training at Levels 3-6, with learners drawn from schools, University Technical Colleges and FE colleges. The Colleges were encouraged to partner with recognised specialist institutions, with a track record in the areas of study such as Higher Education Institutions (HEIs) and private training providers to ensure the newly designed programmes drew sufficiently on detailed specialist knowledge to meet employer needs as well as meeting high quality standards and formal validation requirements. The National Colleges aimed to rebalance participation and contribute to improved parity of esteem between technical and academic education, thus increasing the number of learners choosing higher technical courses.

An £80 million investment from central government was used to establish the Colleges, supplemented with additional investment from Local Authorities (LAs), Local Enterprise Partnerships (LEPs), industry bodies and businesses. But long-term primary sources of revenue for these institutions has depended on the Education and Skills Funding Agency funding for apprenticeships, 16-19 and Adult Skills provision.

Whilst the Colleges have significant potential it has not yet been fully and overall progress has been mixed. This has not been helped by the fact central government did not provide start-up grants which it usually does. So, on some measures, they have performed better, for instance, they have: strong employer leadership; developed new higher-level qualifications and apprenticeship standards; and achieved substantial cash and in-kind contributions to support their establishment and/or to provide state of the art equipment. They are also receiving good student ratings (eg 69% of respondents expressed satisfaction with the College's student support and wellbeing

⁷⁹ Access Creative College, is one of England's largest private training providers, delivering creative education at campuses in seven cities, from Bristol in the south-west to York in the north-east.

⁸⁰ The NCDS run by Ada, has campuses in North and East London and runs a sixth form as well as being recognised as an apprenticeship provider. It offers courses from level 4 to 6 in areas

such as Software Development, Data Analysis, and Digital and Technology Solutions, and Technological Consultancy.

services). But, it is still early days for the Network and the processes still need to fully embed (eg so far only one College has undergone formal inspection) whilst reputations build. Across all National Colleges, learner numbers are below business plan targets and the overall volumes are low. The ability of National Colleges to deliver intended benefits is heavily dependent on raising future learner volumes.

Source: IES (2020) National College Process Evaluation⁸¹

as: Liverpool Philharmonic; National Theatre; ABTT; Royal Opera House; The Goldsmiths' Centre (ie the UK's leading charity for training goldsmiths); Pearlfisher (ie an independent creative design and branding business); The Royal Exchange Theatre; White Light (ie an equipment hire and production solutions specialist); TAIT (ie specialists in the design, construction and delivery of live event equipment).

The original NCCI was also connected to The Backstage Centre. This is a purpose built facility, created in 2013, to accommodate major productions live events rehearsals conferences and workshops. It was designed in consultation with industry experts from some of the world's best, live, theatre production venues and has served to enhance opportunities for learning as well as operating as a standalone facility in its own right. This offers future distinctiveness and hence advantages to the creative technical education offer in future.

Some core strengths of the NCCI are reflected in the recent evaluation.⁸² For instance, employers and learners valued a more customised, specialist and tailored offer than from broader mainstream colleges. But there had been challenges building a profile with employers and learners locally, and sufficient engagement levels, especially without start-up grants from central government.

Due to challenges with the initial business plan, the Government reviewed the ownership, governance and delivery position of the original NCCI. From February 2020, *South Essex College* took over responsibility for the delivery of the curriculum and the Apprenticeships provision moved to ACC. South Essex College has also taken over ownership of the subsidiary company The Backstage Company. These changes were necessary, because, in common, with the other National Colleges (see Box x), the original business model for the NCCI had experienced key operational challenges. This was, in particular, around the forecasts of numbers of learners, and businesses, which did not materialise as had been envisaged, especially demands amongst smaller creative businesses. Research for this study revealed this was largely due to delays in local planning affecting significant infrastructure projects, for example, and restrictions with the rules of skills programmes like Apprenticeships, which prevented

access to certain employers (eg non-levy paying) and individuals (eg older age groups) that the NCCI had intended to support.

This new partnership is known to have a strong track record in education on which to build, and, therefore, to help put the future of the NCCI on a stronger footing. Indeed, South Essex College is located over four main sites in Essex in Basildon, Southend-on-Sea, Grays and now in Purfleet, and serves more than 10,000 learners a year and ACC operates across 7 sites and reaches over 3,000 learners. It is therefore hoped that this will provide a stronger basis to drive up creative education and training in future. With the *University Centre South Essex*, also as part of the new offer, which draws on partners such as UAL and again local employers, there is a further opportunity to strengthen the College's higher education provision. One such example is the UAL accredited degree in Costume Construction in collaboration with the Royal Opera House.

National Skills Academies

Another key partner, which will also have brought sector specific expertise to the region over the years, is the *National Skills Academy for Creative and Cultural Industries* (NSACCI). The NSACCI is one of originally 19 National Skills Academies supporting UK industries across the country by developing training infrastructure to address sector-by-sector skills challenges. The NSA Initiative was launched by the then Government in 2006, bringing together employers and specialist training providers, with the aim of providing more relevant industry-led centres of excellence in learning. It formed part of a series of skills initiatives at that time to increase employer engagement with, and leadership in, technical and vocational education and training, and many of the NSAs were led by partnerships with Sector Skills Councils (SSC).

The NSACCI was established in the creative regional cluster around High House Production Park in Purfleet in 2009. It was run by Cultural and Creative Skills which is the SSC for Cultural and Creative Industries. The NSACCI worked with over 50 FE Colleges and several HEIs all spread throughout the UK. In the Estuary, the network has had close links with the University of Essex, South Essex College, Barking & Dagenham College and of course the National College of Creative Industries which is part of its legacy. At the time of this report Creative & Cultural Skills are replacing the NSACCI with a new network aimed at connecting employers, educators, and other stakeholders with an interest in the skills agenda.

⁸¹ [National colleges process evaluation - research report \(publishing.service.gov.uk\)](#)

⁸² [National colleges process evaluation - research report \(publishing.service.gov.uk\)](#)

Creative Higher Education

The Thames Estuary is also home to some significant higher education institutions (HEIs), with world-class standing in creative education and research. Indeed, according to the TEPC case for investment the TEPC universities already offer high quality and specialised creative courses, which make a direct contribution to the creative and cultural economy. This was backed by stakeholders. *These cover a wide range of creative industry interests from the Media, Film, tv, animation and games, Digital technologies and computing, Architecture, Crafts, Design, Fashion and textiles to the Performing and visual arts.* Some examples include: Goldsmiths University of London (New Cross); the University of Greenwich and the Trinity Laban Conservatoire of Music and Dance (Greenwich); Ravensbourne University London (Greenwich Peninsula); University of East London (Royal Docks); University for the Creative Arts (Rochester and Canterbury); Bird College of Dance (Sidcup); Universities at Medway Partnership (Chatham); University of Essex (Southend-on-Sea and Colchester) University of Kent (Chatham and Canterbury); and Canterbury Christ Church University (Canterbury).

Box 11 : Goldsmiths

One important university within the Estuary is Goldsmiths. Goldsmiths has a long history being founded in 1891, and, since 1904, it has been part of the University of London. Over time, it has become increasingly well known for its creative approach, specialising, in particular, in creative education, arts and design as wider social sciences. It delivers a range of academic programmes involving departments and research centres that work extensively with the sub-sectors of the creative industries and the cultural sector, meeting their needs. It increasingly takes an interdisciplinary approach, integrating subject disciplines (such as music, drama, dance, fine art, design, communications, media and technology) to learn from each other and develop stronger creative alliances, that encourage innovation keeping abreast with, as well as shaping, frontier developments such as augmented reality and digital art.

Goldsmith's has aimed to enhance its relevance to the sector through the establishment of dedicated centres such as the centre for contemporary art (CCA) and Institute for Creative and Cultural Entrepreneurship (ICCE). The CCA is housed in a Turner Prize-winning redesigned Victorian bath house, from where runs its exhibition programme and hosts international artists, projects and residencies alongside talks, performances, films and other events. ICCE delivers a range of programmes that combine academic learning with creative practices, supported by research into new approaches to business, financial models and management in the creative industries. Its research encourages innovation and experimentation in the sector building strengths at the cutting edge of the creative industries and through a strong engagement programme it seeks to both

influence and be influenced by leading areas of the sector as to enhance its teaching programmes.

But, with ongoing investment and developments underway across the Estuary, an increasing number of HEIs are also moving to the region over time and/or are setting up a regional presence in the area, with close proximity to London. For example, in the East Bank development at the Queen Elizabeth Olympic Park in East London, universities such as University College London and the UAL are developing further campuses at the new Cultural Education District (CED) at the site. This will form the UCL East and will be home for the London College of Fashion (LCF) at the UAL. This builds on the existing university presence in London, alongside universities such as Loughborough.

The universities are recognised as vital *centres of excellence for teaching* and hence building higher skills for the local creative workforce. For example, under the Government's Teaching Excellence Framework (TEF) run since 2017, higher education institutions in the region obtained four golds, three silvers and two bronzes to signify excellence in teaching, with Golds including the University of the Creative Arts, the University of Essex and University of Kent. But, in addition, they also have a strong track record for *active research* and delivering innovative projects alongside industry partners and the Government to inspire new business developments. This means they provide a central role, enhancing the capacity to innovate and exchange knowledge and ideas locally and hence can make an active contribution to building effective creative innovation hubs and clusters within the Estuary. This is seen working in practice for example in some of the existing cluster sites presented earlier, such as the Chatham development, where the dedicated Institute of Cultural and Creative Industries at the University of Kent is based. This means, not only are universities vital to advancing continuous development and hence improvements in creative business performance, but stimulating enterprise to establish the next generation of creative and cultural entrepreneurs. This community therefore already provides a strong platform from which to extend the capabilities of the TEPC's creative and cultural industries moving forward, as part of the TEPC vision and work programme.

3.4 Optimising skills system reforms

"But past success doesn't ensure future performance." Whilst there were important foundations for the creative sector within the skills institutional infrastructure in the region, many stakeholders referenced the challenges of keeping up with a constantly changing skills world; especially nationally imposed skills policy developments. Not only has this affected the nature and range of skills programmes offered, but there have been ongoing

changes in governance, funding and accountability structures affecting how education providers operate locally and their skills delivery – this is something that is also often cited in the literature.⁸³ A key question for TEPC partners has been, how to support local education and skills partners across the Estuary, to continually evolve in a way that ensures continuity in meeting local skills objectives over the long-term, thus protecting local skills strengths and assets. In the context of Covid-19, it seemed more partners have wrestled with what the new skills norm is, in a more turbulent world, experiencing regular phases of disruption.

Consequently, the review has also reflected with stakeholders across the Estuary about *what they have regarded as the most significant education policy developments to influence over the last decade to maintain their local skills identity and long-term skills missions*.

One of the biggest changes of the Government, since 2016, has been the major programme of reform of technical education - set out in the publication of the post-16 Skills Plan.⁸⁴ Indeed, the skills minister of the time stated that this was *“the most ambitious post-16 education reforms since the introduction of A’Levels 70 years ago.”* Given its scale, many of the paths of reform are still not complete 5 years later, and therefore it has become important to reflect on its key features in its own right.

Technical education reforms and the post-16 skills plan

The post-16 Skills Plan was based on the findings of the independent panel led by Lord Sainsbury⁸⁵ as well as earlier work of the Wolf Review⁸⁶. This acknowledged that with a persistent productivity problem since the financial crisis of 2008, and long-running, deep-rooted skills deficiencies in the UK economy, more radical steps have been needed to enhance the *effectiveness* of the skills system, *incentivising lifelong learning*, and providing *a high quality education for everyone* to access throughout their lives. Not only does this aim to put the English *technical education system on a par with the standing of longer running more traditional pathways* through the UK’s higher education system, but other world leading technical systems in Germany, Austria, Switzerland and Scandinavia. Such developments have recognised, that technical education, which is more connected to employers and faces into work, in a dynamic and continually evolving economy, is a vital mechanism in the UK to keep training, and in turn the skills of the workforce, up to date, and ensure a better talent

pipeline in future. Indeed, it reinforces many of the core principles at the heart of the TEPC Vision.

The national reform programme has committed to creating 15 new technical education routes or pathways, developed in partnership with employers. It is being overseen by a new skills body: the Institute for Apprenticeships and Technical Education (IFATE), supported through employer-led, hence sector-driven, Route Panels connected to each pathway. These Route Panels oversee and review the detailed work of targeted groups of employers, represented on a range of trailblazer groups and qualification panels, which are directed to shape the content of the education programmes connected to roles in each pathway. This is believed to be vital to enhance the relevance of the technical programmes and keep abreast of ongoing labour market developments. It also in principle provides a clear basis for stakeholders across the Estuary to shape their local technical offer.

Apprenticeships and T’Levels

In essence, the technical reform programme consists of new: *Apprenticeships*, providing work-based pathways designed around a job; and *T’Levels*, offering college-based pathways delivered around a work placement and concrete work experience opportunities provided by an employer⁸⁷. The programme defines discrete career pathways known as *occupational maps*, which shape where Apprenticeships and T’Levels are to be developed. There are two covering the main creative industries, including one in *creative and design* occupations and another for *digital* roles, for example. In turn, this means there are now two industry-led Route Panels, supported by the IFATE, shaping two of the most relevant creative pathways. These also oversee and review the detailed work of targeted groups of employers working on the development of new proposals for Apprenticeships and/or T’Level qualifications through the aforementioned IFATE trailblazer groups and T’Level panels.

A core aim of the technical education reforms being run by the IFATE is to *simplify* and *streamline* qualifications and education pathways across the education and skills system and to improve *progression routes and transitions* between academic and technical routes, creating *greater clarity about what routes are available*. It is hoped this will better supply a talent pipeline in future and reduce current and potential skills deficiencies,

⁸³ Institute for Government (2017) [All change](#).

⁸⁴ [Post-16 skills plan and independent report on technical education - GOV.UK \(www.gov.uk\)](#)

⁸⁵ Independent Panel on Technical Education [Sainsbury panel report \(formatted version\) \(publishing.service.gov.uk\)](#)

⁸⁶ DfE (2011) Review of vocational education: the Wolf report. [Review of vocational education: the Wolf report - GOV.UK \(www.gov.uk\)](#)

⁸⁷ DfE (2018) T-Level Action Plan [T Level Action Plan 2018 \(publishing.service.gov.uk\)](#)

shortages and gaps. Apprenticeships therefore can now provide in principle an alternative technical work-based pathway from advanced Level 3 to higher and degree levels from Level 4 through to 7. The T'Levels programme also aims to support progression over the medium term, but is on a slower reform trajectory, with qualifications for creative areas not available until 2023.

Repurposed employer engagement

A further intention of the technical education reforms has been to strengthen employer engagement to enhance the relevance of what is delivered, and ensure it meets industry needs. The new model for technical education, working through the IFATE, has replaced responsibilities formally undertaken by the UK Commission for Employment and Skills (UKCES) which was shut down in 2017. It also marks a departure from central public funding for the national network of SSCs, first established in 2002, to work with and represent the interests of industry, sector by sector. Despite changes in public investment in sector skills bodies since 2010, some still exist and this includes SSCs operating in the creative industries to support the design of industry-led skills products and programmes – such as Cultural and Creative Skills and ScreenSkills (formerly Creative Skillset). But, the IFATE has had to develop wider engagement mechanisms to create closer connections between employers and providers more generally to enhance the *quality* and *relevance* of technical education. Many of these have been centrally driven.

The solution has largely been provided through the various employer panels, whether operating strategically through the Route Panels or at a grassroots level through the trailblazers and T'Level panels. These seek to provide the basis to facilitate the ability to co-design skills products in collaboration with industry representatives. In addition to the Route Panels and wider trailblazer groups, the IFATE also consults with wider industry trade bodies and industry experts including members of the Industrial Strategy Creative Industries Council.

The IFATE then uses these channels to more effectively, and regularly, update the standards for occupational competency that need to be achieved for Apprenticeships as well as the content of the T'Level qualifications, in response to ongoing labour market developments. These new

Apprenticeship standards replaced the previous Apprenticeship Frameworks in 2020 and in England it marks a move away from the UK-wide, underpinning framework of National Occupational Standards (NOS).⁸⁸ But, NOS are still used by partners in the skills systems in Scotland, Wales and Northern Ireland. In parallel, A'Levels have been reformed to give a high-quality option for students choosing an academic route. At the time of writing, a total of around 60 Apprenticeship standards had been approved across the creative and design pathway. Further, quite radical, steps to enhance the breadth and depth of employer engagement, and hence to boost take up of Apprenticeships, are provided through various financial policy measures. Indeed, in 2017, the Government introduced an Apprenticeship levy on UK employers to fund the new Apprenticeships and to ensure the programme was co-funded, with contributions from the state, employers and individuals - through their salaries. Levies are only one example of the full range of policy levers designed to encourage employers to train on a collective basis – so called collective measures.⁸⁹ The current Apprenticeship Levy is charged at a rate of 0.5% of an employer's annual pay-bills, in excess of £3 million. Its philosophy is based on collecting enforced, small financial contributions from many employers to enable the funding and design of more significant employer-led training activities that would have not happened otherwise. As such, it can be accessed by a larger business community, supporting stronger collaboration over training, especially amongst smaller businesses⁹⁰.

Where employer-funded, levy-grant schemes are clearly hypothecated and employers see, and can control, the use of funds, such schemes have driven strong employer engagement. They are usually deployed where business communities have common interests, such as across key sectors. There are many international examples where pooled resources are seen to enhance business networking, collaboration and knowledge exchange, and raise the capacity and capability for training, especially in smaller companies, which lack spare resources and expertise to direct at such activities (see for example the Skillsnet Scheme in Ireland⁹¹). It therefore offers some potential in principle in the Estuary to drive stronger employer-led skills solutions and hence more relevant skills programmes. Indeed, the London Mayor seeks to access some of the national levy funds to offer more flexible,

⁸⁸ The NOS will continue to operate to inform apprenticeships and wider technical training in the wider nations of the UK. The NOS are now overseen by Skills Development Scotland on behalf of the wider national Governments with the closure of UKCES [Home \(ukstandards.org.uk\)](https://www.ukstandards.org.uk)

⁸⁹ UKCES (2009) Review of Employer collective Measures. [\[ARCHIVED CONTENT\] UK Government Web Archive - The National Archives](#)

⁹⁰ OECD (2019) Getting Skills Right: Future Ready Adult Learning. [Getting Skills Right: Future-Ready Adult Learning Systems | en | OECD](#)

⁹¹ [About Us - Workplace Learning | Skillnet Ireland](#)

industry-led skills provision for the region for example.⁹²

In England the Government is seeking to limit payment of the levy to larger employers making up less than 2% of UK employers. Levy paying employers are required to access training and assessment through a Digital Apprenticeship Service. In addition, each employer receives an allowance of £15,000 to offset against their levy payment. There are still open questions about how effectively these measures are. This is not least because rules driving use of the levy are said to be too restrictive, and funds expire and return to the HM Treasury after 24 months if not used.⁹³ This has been quite considerable.

In February 2018, the Government responded to feedback from the business sector by allowing levy-paying employers to transfer up to 10% of the annual value of their levy funds to other organisations in their network and/or supply chains to pay for apprenticeship training and assessment. This was increased to 25% from April 2019, and is an area being kept under continual review. The study has been exploring the implications for the shape and nature of employer involvement in technical skills programmes in the Thames Estuary.

The National Retraining Scheme

The Government has also taken additional steps to stimulate rates of adult learning alongside the technical education programmes provided by Apprenticeships and T'Levels. In 2017, it established a new *National Retraining Scheme* which has aimed to pilot the delivery of training directed at critical skills shortages such as in digital skills and construction. A core goal has been to respond to industrial restructuring more systematically and hence to target the individuals at risk of unemployment, because of business closures and redundancies due to globalisation, technological and changes. As well as responding to skills most in-demand, the Scheme has also sought to target those adults "hardest to reach", in training terms, who are low skilled. The resulting programme it created "*Get help to retrain*" designed an online and offline service, which supported users to identify and input their current skills and then based on these skills, offer suggestions for training and alternative employment. Whilst Get help to retrain will not continue beyond the piloting phase in its own right, it nevertheless is providing considerable learning, drawing on the experiences of around 3,600 participants who accessed training through the on-line digital services and support. Indeed, the insights are being used to enhance the delivery in future of wider skills programmes, especially those part of the

adult training landscape. In particular, it is shaping the use of the £2.5bn National Skills Fund announced in the 2019 Conservative Government Manifesto. Part of this has been deployed to develop regional schemes for adult skills training, known as *boot camps* and are available within the Estuary (these are explored further below).

Institutes of Technology

The Government has also been pushing forward other policy reforms in further and higher education to enhance the range and quality of specialised technical provision. One crucial part of these reforms has been seen with the *Institutes of Technology* (IoTs). These new skills institutes have aimed to complement the Government's wider technical education reform programme, and to further support connections and collaborations within the local skills delivery infrastructure. This is especially between further and higher education institutions, although in the case of Barking & Dagenham College, this involves a partnership with Coventry University – London.

Over the last year or so, the Government has encouraged bids to establish a network of IoTs across England. These are based on collaborations between further education (FE) providers, universities and employers. It hopes to ensure comprehensive coverage across as many regions as possible, and partners within parts of the Thames Estuary have already seized the opportunity, as seen with the IoT in East London, at Barking & Dagenham College. Whilst the national focus has prioritised STEM training, including in construction and infrastructure technologies, advanced engineering and robotics, at a time when we are seeing increasing fusion between different creative disciplines and technology in the economy, this also needs to acknowledge the need for an increasingly multidisciplinary approach as evidenced at the East London IoT.

Box 11: Barking and Dagenham College

An IoT has recently been opened at Barking and Dagenham College. To ensure this is relevant to the needs of the economy, locally and nationally, and sufficiently demand-led, the Institute has been developed in partnership with businesses, students and local stakeholders. The businesses involved include: Huawei, Saint Gobain, Transport for London. The IoT will be working in specialisms seeking to meet the needs of the following sectors: Construction and Infrastructure; advanced engineering and robotics; creative and digital sectors covering areas such as animation and games design, 3D design and graphic design.

Source: East London Institute of Technology ⁹⁴

⁹² [Skills for Londoners Framework 2021](#)

⁹³ HoC (2020) Research Briefing: effectiveness of the apprenticeship levy. [Effectiveness of the apprenticeship levy - House of Commons Library \(parliament.uk\)](#)

⁹⁴ [East London Institute of Technology \(eliot.ac.uk\)](#)

The growth of “createch” is recognising the new business opportunities, opened up from blending new technologies such as immersive and virtual technologies, machine learning and artificial intelligence, and widening applications to new business areas, products and services. This in turn is driving “skills fusion” in the economy and changing employers skills requirements, where technological advances are blending expertise, knowledge and skills across disciplines. The IoTs aim to enhance the local *higher technical education offer* with a particular focus on strengthening pathways at Levels 4 and 5 being encouraged by the DfE. This is a further chance to specialise skills development and training in createch courses in sectors critical to the future economy such as the Digital economy, Animation & Games Design, 3D Design and Graphic Design. Whilst the first 12 IoTs were selected through a Government-led competition and opened from September 2019, at the time of writing a second competition was open to establish a further eight partnerships.

Higher Education reforms

With broader developments in education pathways within technical education, it is of interest that the Government has also focused over this period on the core mission of universities, and their functions. For instance, in 2018, it established a new regulator for higher education - the Office for Students (OfS). This has sought to modernise the regulatory framework for higher education providers and hence set clear, common and consistent requirements around quality and standards for providers moving forward to support learning aims, and progression. It has also placed an enhanced focus on innovation in teaching and learning, to achieve successful student outcomes. Building on wider commitments across the skills system to enhance employer engagement, it has also sought to ensure higher education is responsive to industry needs. This has placed an increasing focus therefore on advancing learning methods and increasing graduates' prospects (that is high-skilled, graduate level employment and/or further study) and work-readiness. At the same time, in revisiting provider registration regulations, there has been a particular emphasis on making it easier too for a wider range of high quality providers including colleges and HEIs, as well as universities, to deliver higher education. This has been seen with the development of IoTs and has focused, especially between Level 4 and 5, and included technical education, such as Apprenticeships.

Furthermore, there have been steps to support greater complementarity, efficiency and

effectiveness in the core strategic objectives of universities. In particular, this has sought greater alignment around research, teaching and knowledge exchange, through the development of “excellence frameworks”. Indeed: the *Research Excellence Framework* (REF) provides a basis to independently assess the quality of higher education research; the *Teaching Excellence Framework* (TEF) evaluates excellence in teaching at HEIs in driving successful student outcomes; and the *Knowledge Exchange Framework* (KEF) reviews the effectiveness of sharing and using outcomes from research – here a key intent has been to secure practical improvements in policies and practices for the benefit of the public, businesses and/or communities. These have placed an increasing focus on the role of universities in shaping creative education and research locally, as well as nationally, and encouraging universities to support the needs of regional communities and clusters – this is whether through business and talent development, innovation, and/or enterprise.

Reforms to the Careers System

At the same time as reforming education, alongside a refreshed Industrial Strategy, the Government has also repurposed its Careers Strategy.⁹⁵ This has recognised the important complementary role of the careers system, combined with education, in helping people of all ages better understand their career options and hence the best pathways for them to pursue into work and through the labour market.

Box 12: Creative Careers Programme

The Creative Careers Programme (CCP), is an integrated industry-led initiative that is working to raise awareness to the routes into the creative industries. , Launched initially in England in 2019 via funding from DCMS, the programme is a partnership between The Creative Industries Federation, Creative & Cultural Skills and ScreenSkills. It has been developed through engagement with a range of businesses, industry bodies, schools and teachers. Arts Council England and the Welsh Government via Creative Wales funded further developments of the 2020-2021 programme. Key CCP activities include:

- 400 work experience opportunities supported via a partnership with Speakers for Schools
- 317 employers engaged as speakers reaching over 72,000 students
- Website for Discover! Creative Careers launched as a key tool and resource for young people – along with teachers, parents and guardians – to find information about creative careers
- 250 'Enterprise Advisers' enlisted to provide support to school leadership
- 28,000 students participated in immersive employer-led opportunities



⁹⁵ [Careers strategy: making the most of everyone's skills and talents \(publishing.service.gov.uk\)](https://publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/781107/careers-strategy-making-the-most-of-everyones-skills-and-talents.pdf)

- Engagement of over 1,000 creative employers and leaders, and
- Over 120,000 students participated in recent online Discover! Creative Careers activities.

Its flagship event, Discover! Creative Careers Week is a call to arms for the creative industries to open their doors, physically and online, to introduce students from all backgrounds to the various job roles that exist. In 2019 hundreds of employers hosted thousands of students in their buildings to take part in tours, workshops and tasks and provide immersive, hands-on experiences. Discover! Creative Careers Week has recently adapted to a digital delivery model. The CCP has also facilitated regional training for CEC Enterprise Coordinators and provided specialist Enterprise Advisors to support school leadership teams with their Careers Strategies.

Source: Discover! Creative Careers [website](#)

A key intention of Government recently has been to tackle the variation in activities in different localities, and to enhance the overall national service, by offering more integrated and high-quality careers information, advice and guidance. In particular, the Strategy has sought to amplify and better coordinate the activities of local partners such as schools, colleges, universities, ITPs, employers, local authorities, LEPs, Jobcentre Plus and career professionals. By working through nationally funded agencies and initiatives such as the Careers Enterprise Company (CEC)⁹⁶, the National Careers Service (NCS)⁹⁷ and Ofsted, the Government has sought to raise the standards of careers services, using eight Benchmarks of good career guidance, developed by the Gatsby Charitable Foundation, and assessing support across each benchmark.

With sector-specific funds initially from DCMS and the Arts Council England, the Creative Industries have also been able to develop their own dedicated programme of careers support to supplement the core national services, and further enhance awareness to growing opportunities in creative careers - Discover! Creative Careers. As these national and sectoral careers programmes have become more embedded across the Estuary, stakeholders consulted in the study noted their value in amplifying people's interests in careers within the creative economy. Indeed, SELEP reported increasing work with, and through, such networks and making full use of the resources in running local events and providing services with local partners.

3.5 A future way forward from 2020?

Yet, a new decade, has not stifled the Government's long-term skills ambition, and a new

⁹⁶ The [CEC](#) was established in 2014 to provide high impact careers and enterprise support to young people (aged 12-18) and to coordinate employers, schools, colleges, funders and providers locally. It manages a national network of Enterprise Coordinators, trained to work with providers to provide careers advice, supported by businesses acting as Enterprise Advisers.

wave of skills reforms has been ignited, following the 2019 election, which is setting out a clearer path for the years ahead – the consequences of which the TEPC project will also need to take into account. As the Government has put in place policy measures to accelerate its wider programme of reform, it has also been important through the research, to briefly reflect on these developments within the region, with specific reference to the TEPC Strategy. In so doing, we have sought to begin to unpack the implications, especially for providers across the Estuary, and to explore with local stakeholders the additional impact on future skills opportunities and challenges.

These further reforms have largely sought to: *advance developments around technical education; rebalance skills delivery; and create a simpler, more coherent and streamlined system, that better supports lifelong learning.* Some of the specific measures have included:

- **Strengthening strategic oversight** of the skills system, with the establishment of a national *skills and productivity board*⁹⁸ A key aim is that this group can provide regular expert and independent advice on the skills priorities most in demand, and of highest value, to the economy, nationally and locally;
- **Commissioning an assessment of the Post-18 Education system and funding** (ie via the Augar Review⁹⁹) to understand how to *improve system capacity, enhancing access* to learning for diverse groups, whilst ensuring cost-effectiveness and *value for money*;
- **Improving system effectiveness and streamlining progression opportunities** through various *strategic reviews of the qualifications and skills offer* in different parts of the education system. This included: Level 3 and below qualifications (excluding T'Levels, A'Levels and GCSEs) and Higher Technical Education (Level 4 and 5) – these reviews have sought to establish what groups of qualifications should continue to be funded alongside A'Levels, T'Levels and Apprenticeships;
- **Intervening to rebalance and strengthen technical education pathways**, including between further and higher education and to *boost the function of further education colleges* in the skills system. For example, there have been further steps to: boost the *creation of more high-quality Apprenticeships*;

⁹⁷ The [NCS](#) was established in 2012 to provide information, advice and guidance through face-to-face and telephone advice, web chat and email.

⁹⁸ [Skills and Productivity Board - GOV.UK \(www.gov.uk\)](#)

⁹⁹ Augar Review (2019) [Independent panel report to the Review of Post-18 Education and Funding \(publishing.service.gov.uk\)](#)

strengthen alternative *technical pathways at L4 and 5*; and improve the delivery infrastructure with for instance a further wave of new *Institutes of Technology*.

- **Enhancing employer engagement**, especially with a range of high-quality employer-led courses, and reviews of employer funding such as through the skills levy.

The £2.5bn National Skills Fund, announced as a Conservative Manifesto funding commitment in 2019, has provided additional funding for emerging policies. Over the course of year, future skills priorities have become clearer, with a range of policy announcements, including: the Covid-19 recovery plans - Plan for Jobs¹⁰⁰ and the winter economy plan¹⁰¹; the Skills white paper – Skills for Jobs January 2021¹⁰²; and culminating most recently in refreshed Industrial Strategy – Plan for Growth March 2021.¹⁰³ With the Comprehensive Spending Review (CSR) expected in the autumn 2021, this will be an opportunity for the DfE to provide even further clarity to their plans for this life of Government.

Overall, these have arguably sought to help businesses and employees through the immediate crisis created by the Covid-19 pandemic. This includes significant investment to grow a more highly skilled workforce, which is seen as one vital component to economic and social recovery in a post-Covid-19 climate. The Government recognises that the skills challenges of the past, even pre-Covid-19, are persistent and deep-rooted, and is pushing forward further reforms as part of its Levelling Up agenda with even more urgency.

The Government has looked to the autumn Spending Review 2020 (SR20)¹⁰⁴, to kick start long-term economic growth, setting a broader context for the CSR in 2021, and, hence, education and training commitments in the years ahead. Crucially, this sees education and skills policy as a vital pillar of the UK economic strategy. More specifically, this has had a number of dimensions that it will be important to track for local partners, responding to the needs of the creative economy, such as within the TEPC. Indeed, specific recent developments aim to:

- *Stimulate lifelong learning for all age groups*, on the back of the Covid-19 pandemic and more generally in response to wider industrial restructuring in the economy, with measures which raise the publicly funded skills contribution and facilitate access to additional financial support to fund wider learning. In particular, this sees for example extensions to public funding to provide a *lifetime skills*

guarantee that encourages lifetime “*habits of learning*” by raising the individual platform of skills¹⁰⁵. These measures aim to help those who want to upskill or need to reskill at any stage of their life or career to do so, and support progression, although generally seek to prioritise funds towards *highly valued subjects* albeit as defined by the DfE. Unfortunately, there is a real risk that this excludes many creative subjects.¹⁰⁶

At the same time the funding system is being transformed to offer more flexible loans for in-demand higher technical courses (ie above Level 3). Indeed, there is the objective to trial *lifelong loan entitlements* for four years of post-18 education, to enable closer alignment between further and higher education pathways. Although implementation is not expected until 2025, to enable the detail to be worked out, the stated intent has been made clear. That is, the flexible entitlement aims to enable people, who want to break up and “space-out” their study to split it into segments, transferring credits between colleges and universities, and supporting more part-time learning. In turn, this could mean that adults will be able to train and retrain through a fuller range of higher technical courses at Level 4 and 5 as stand-alone packages of training as well as being part of a fuller education pathway. This also raises issues about the potential of modular and credit based training programmes in future, and the degree to which they can be supported locally.

- *Enhance the technical education skills offer through stronger employer engagement* especially with a range of high-quality employer-led courses and skills initiatives. These are intended to better meet industry needs, especially in priority areas such as the creative industries. Crucially, this states the goal to enhance the local infrastructure and to enable employers to play a more central role. This would mean working with local stakeholders to shape *Local Skills Plans* and strengthen technical skills provision to better meet local labour market needs. A new *Strategic Development Fund* aims to enable the development of industry-led skills products and delivery models incrementally testing and evaluating new approaches. A key goal of Government is to enhance technical

¹⁰⁰ [A Plan for Jobs 2020 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/a-plan-for-jobs-2020)

¹⁰¹ [Winter Economy Plan - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/winter-economy-plan)

¹⁰² [DfE \(2021\) Skills for Jobs](https://www.gov.uk/government/consultations/skills-for-jobs)

¹⁰³ HMT (2021) [Plan for Growth](https://www.gov.uk/government/consultations/plan-for-growth)

¹⁰⁴ HMT (2020) Spending Review. [Spending Review 2020 documents - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/spending-review-2020)

¹⁰⁵ Currently, the government pays for a first A-level equivalent qualification up to the age of 23. This therefore extends the offer of a fully funded college course to all people over 18 in England without an A-level or equivalent qualification, but *only* for courses deemed to be valued by employers

¹⁰⁶ [Qualifications in new funded offers - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/qualifications-in-new-funded-offers)

pathways, such as supporting the take up and growth of high quality Apprenticeships and more programmes at Levels 4-5 to complement those available at L6 and above.

Indeed, on Apprenticeships, the Government has committed to piloting more flexible delivery models to support Apprenticeships in industries with more flexible working patterns, such as the creative industries. Further, to stimulate opportunities, as part of a post-Covid-19 recovery, incentive payments are being offered to employers for hiring a new apprentice until March 2021. A new *Apprenticeship pledge* is also being introduced from August 2021, to allow employers who pay the Apprenticeship Levy to transfer unspent levy funds in bulk to small and medium-sized enterprises (SMEs) in their sector, business network and/or supply chain - unspent funds will still expire after 24 months. In addition, the Government will set up, from August 2021, a new online service to help better match levy paying employers with SMEs that share their business priorities.

Furthermore, in terms of stimulating new qualifications at Levels 4-5¹⁰⁷, the IFATE has been commissioned to introduce a dedicated national approval scheme to ensure the knowledge, skills and behaviours employers want at this level are provided. Currently, the IFATE has opened the approvals process to start to consider applications for new qualifications and this has focused initially on the Digital route as a pilot. Applications were made through Awarding Bodies by December 2020. Approved qualifications will be confirmed in 2021, with the first teaching of the qualifications from September 2022.

- *Invest in Further Education* to boost access to high quality, in-demand courses for young people and adults. The intention here has been for the Government to help deliver *in-demand and valued* subjects some of which can be more expensive to deliver such as engineering, health, and advanced maths as well as many creative subjects. For instance, there is additional funding made available directed to priority subjects in the form of a High Value Courses Premium (HVCP).¹⁰⁸ Whilst some priority funding such as for the HVCP initially backed

some creative courses, this has not universally been the case and as such “priority assessments” of what courses are in high demand will have to be kept under close review.

- *Push forward with reforms in higher education* to ensure provision is of the highest quality, meets sector-recognised standards, achieves value for money and strengthens the English higher education sector and its international reputation. This has focused on reviewing and updating key policy tools such as the regulatory framework for registering higher education providers¹⁰⁹, and the Teaching Excellence Framework, as well as funding models¹¹⁰. Again, any variable impacts for ensuring consistency in creative higher education has been an area of local concern.

The Government therefore has committed to a range of additional concrete policy measures through 2020, and the future skills and education programme is still evolving as we progress towards the Comprehensive Spending Review in autumn 2021. At face value, if the Government remains true to its commitments, there is clear alignment with the skills policy goals of the Estuary, as outlined earlier – and with that there is an opportunity to continue to optimise for the Creative Industries’ local strategic priorities, that is: early learning and the future talent pipeline; adult lifelong learning and progression; as well as supporting in-work transitions.

As such, this could offer significant opportunities for future skills action within the TEPC moving forward as well as other local areas across England. However, the devil is also in the detail. As such, a key imperative is making sure such developments can be effectively exploited over time to enable the local skills system to evolve in the “right” ways that remains responsive to changing labour market needs and continues to best support local creative skills developments in the Creative Industries as a priority sector in the region. In that wider and developing skills context, as policy implementation continually evolves, our research project has provided a chance to explore what distinct actions, specifically targeted to local industry needs, will continue to be prioritised in future. So, with a better understanding of the local skills infrastructure, and evolving policy landscape, it has been important to explore the tangible implications, opportunities and challenges ahead within the Estuary.

¹⁰⁷ DfE (2020) Reforming Higher Technical Education. [DfE consultation overview template \(publishing.service.gov.uk\)](https://www.gov.uk/government/consultations/reforming-higher-technical-education)

¹⁰⁸ The purpose of the HVCP is to provide extra funding to grow the number of students studying *selected* and *substantial*, level 3 study programmes. These include T Levels and selected A level subjects or Sector Subject Areas (SSAs). Without the additional funding there is a risk substantial and hence expensive courses will

be de-prioritised by providers regardless of external demand, due to competing pressures on funding. Funding will first be paid through mainstream 16-19 allocations for the 20/21 academic year. [16 to 19 funding: High Value Courses Premium - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/16-to-19-funding-high-value-courses-premium)

¹⁰⁹ [OfS \(2021\) Consultation on regulating quality and standards.](https://www.gov.uk/government/consultations/consultation-on-regulating-quality-and-standards)

¹¹⁰ [DfE \(2021\) Teaching Grant Guidance 2021/22](https://www.gov.uk/government/consultations/teaching-grant-guidance-2021-22)

Key takeaways

The research examined the post-16 education and skills system within the Estuary to understand the distinctiveness of the skills offer and regional specialisms and hence needs of the Creative Industries locally.

Whilst there was not a dedicated pan-Estuary skills strategy for the creative economy at the time of the study, drawing on the separate skills strategies locally, high-level objectives were transparent. The overriding goal was to create a more *responsive, and employer-led creative education and skills infrastructure* for the region in future. Three strategic objectives were identified, to:

- **enhance entry opportunities for young people** and the future talent pipeline;
- **support lifelong learning and progression** routes for adults; and
- **encourage in-work transitions** into the sector, widening access and the diversity of the future creative workforce.

In advancing its strategic objectives, the local skills system has evolved some important core features, to help better meet the needs of the creative economy, not least it has developed:

- **A recognised baseline infrastructure in post-16 creative education** across the Estuary, through further and higher education courses and pathways and routes into work;
- **Well-established education routes** – *academic routes* via A'Levels to university, and *technical routes* on to further study through traditional Applied General Qualifications;
- **An experienced local skills ecosystem** supporting greater specialism through a range of local skills institutions, including a network of around 120 post-16 schools, 50 further education colleges, 13 universities and around 30 ITPs – on which to build future partnership working;
- **A network of specialist creative centres of excellence** Some *publicly funded* (eg University Technical Colleges, National Colleges for the Creative Industries, the National Skills Academy for the Creative Industries; & Institutes of Technology). Some *internationally renowned creative institutions* such as: The University for the Creative Arts; and Ravensbourne; Others *industry recognised* (eg Screenskills select; BFI Film Academy; and the ACE Education Programme). This network is vital to extend the scale, depth and reach of the creative offer regionally, and in turn its responsiveness to local industry and individual needs.
- **Customised sector-specific skills programmes** that crucially add value to the mainstream, baseline offer and build policy continuity over time around local priorities. These are enabled by industry expertise locally and regional and sectoral funding that can provide the space to act (eg the Digital Skills Partnerships, Creative Estuary, New Creatives, the Talent Accelerator, Creative Enterprise Zones and sub-sector plans such as the screen industries plan in London).

But in a dynamic environment of ongoing change, the future success of the system will depend on its ability to be agile and responsive to continual drivers of change to meet evolving industry needs. Not only do these involve international forces and megatrends (around globalisation, innovation and technological and climatic change) but significant policy developments. These include for instance steps to:

1. **Strengthen national strategic oversight** with the establishment of a national *Skills and Productivity Board* to provide regular expert advice on skills priorities most “*in demand*” to the skills system;
2. **Assess the Post-18 Education System and funding** (ie via the Augar Review) to understand how to *enhance capacity, access and value for money*;
3. **Enhance system effectiveness and streamline progression opportunities** - various *strategic reviews of the qualifications pipeline have been commissioned* to establish what should continue to be funded alongside A'Levels, T'Levels and Apprenticeships;
4. **Rebalance and strengthen technical education pathways**, between further and higher education, on the back of the post-16 Skills Plan. For example, there have been further steps to *boost more high-quality Apprenticeships (L4+)*, and set up more *IoT*s; and
5. **Enhance employer engagement**, especially with a range of high-quality employer-led courses, skills initiatives (ie flexible apprenticeships) and distinct funding streams (eg the Skills Accelerator Fund).

4. Local opportunities and challenges: future-proofing a creative skills system

4.1 Introduction

In an environment shaped by ongoing change, the research has sought to understand the specific local effects that these continuing policy reforms have had on the skills system within the Estuary. A key focus, more specifically, has been to explore local stakeholders' perspectives of change, and the impact on their attempts to meet local skills objectives and industry priorities in the TEPC. It has been of particular interest to investigate the perceptions of *opportunities and challenges*, and to understand whether ongoing developments are accelerating the delivery of local skills objectives or impeding progress, by displacing skills activities and resources. A key intention has been to offer insights on how to enhance local skills action in future.

4.2 Delivery opportunities

There are many examples of how the local ecosystem across the Thames Estuary has sought to seize opportunities offered by change, whether that has been responding to the dynamism of the labour market or the evolving skills policy reforms. A key intention has been to preserve and strengthen the creative education and skills offer locally, despite ongoing turbulence and disruption. Indeed, activities have broadly aimed to protect and support local strategic skills objectives around: early entry for young people into the sector and a strong future pipeline; progression, especially for adults; and in-work transitions into creative careers.

Responding to the future priorities of the Creative Industries Locally

Crucially, there was evidence that skills partners across the Estuary were already responding to change. Processes to anticipate evolving employment and skills requirements were seen as key to ensuring local programmes were responsive and remained relevant. Local providers were highly sensitised to the pace of economic developments externally, driving changes in different Creative Industries operations and employment needs.

In the absence, of specific futures research for the region, national sources such as those from the DfE's recently funded Working Futures study, were providing a steer for some on likely future trends. Presuming OBR's prediction of an economic bounce back in the next year are right, people anticipated a strong return to growth for the creative economy. Indeed, the data suggested that, if national trends were to be replicated that in 2027 many of the key sectors of the Creative Industries would be expected to cover a greater share of the economy than now, at 7.6%, and to exceed other priority sectors such as manufacturing

(6%) and construction (6%). Relatedly, employment has been forecast also to grow at a faster rate over that period than for the economy as a whole.¹¹¹

In the context of ongoing developments associated with the *future of work*, providers showed awareness of the impacts on creative work and learning, through rapid advances in technology and innovations in products, services and ways of working. They discussed an increasing *fusion of skills* in the labour market over time¹¹² and in particular, a merging of technology with wider technical creative skills and expertise – evident for example in growing createch skills. This underlined the importance of regularly updated skills research and labour market information (LMI).

There was recognition that online, labour market and skills intelligence hubs across the region were helpful in tracking general labour market changes within different parts of the Estuary – such as the London employment and skills hub¹¹³ and the skills and LMI hub by SE LEP¹¹⁴. Importantly, this had a role to build on national sources, such as Working Futures, provided through data-packs from the DfE for the local Skills Advisory Panels via SE-LEP and the GLA.

But, there was an expressed *hunger* for more *frequent, granular and future focused research and local labour market intelligence* to offer insights to teaching staff about how to adapt creative skills programmes and learning. In part, this was placing an onus on individual providers finding their own solutions. Indeed, many were working even more closely with creative businesses, pulling on their own dedicated employer engagement teams, to adjust their course design and curriculums to support future skills requirements. These partnerships therefore recognised the significance of priority creative sub-sectors in key clusters in the region. For example, there was a *focus on growing specialisms in Film, tv and screen industries, Design, Music and the performing and visual arts, Advertising and marketing as well as the Digital sector*. These teams reported working through local business networks, with individual as well as groups of businesses, facilitated by wider industry and membership bodies such as Creative and Cultural Skills, the Association of British Theatre Technicians, the Institute of Practitioners in Advertising and ScreenSkills, as well as awarding organisations such as UAL and BTEC. These developments have also included key anchor employers in the sector such as: the BBC, Sky and Timeline TV, Bluebell TV and BT. Universities and specialist research institutions in the region, have played an important role too, understanding labour market developments and have been a further source of intelligence for some providers, facilitating new ways of adapting,

¹¹¹ DfE (2020) [Working Futures](#) – creative sectors covered included: computing; film broadcasting and music; architectural and related; advertising; publishing; arts and entertainment; libraries and museums.

¹¹² Carey et al (2019) Skills Talent and Diversity in the Creative Industries. [CIPEC](#)

¹¹³ [Skills and Employment Hub | London City Hall](#)

¹¹⁴ [Labour Market Information - South East Skills](#)

working and learning. For instance, Kent University has a number of research centres leading pioneering research around new approaches to deploying technologies in different parts of the sector such as the Institute of Cultural and Creative Industries. These cover areas including the use of artificial intelligence, machine learning, data mining and visualisation, and are exploring innovative and virtual approaches to the creation, performance and dissemination of creative content such as music. Such thinking has been of particular interest recently through the pandemic, given the impact of public health measures on traditional ways of operating.

Clearly, *understanding and responding to such changes are becoming an important feature of local customisation of courses* in the region and developing a more distinct *local creative offer*. This is demonstrated in various ways. One is seen in the growth of new programmes in *multiple disciplines* being offered by local providers, in courses such as: design and technology (for Fashion, textiles and product design); Arts and technology 3D design, Interactive design and architecture; Cinematic architecture; Digital media and journalism; Advertising and Digital Marketing; Graphic design and Computer Animation; Music and Audio Technology; Creative Coding; and Creative and Cultural Entrepreneurship, with enhanced management and leadership.

It was also affecting teaching and learning methods and the nature of skills delivery. *Covid-19 was perceived to have accelerated moves towards new digitally enabled forms of working and learning*, which it was felt would have lasting effects.

"Following lockdown our performers are learning to perform virtually through multi-media as well as physically. Training programmes have to support this response."

As such the social and economic lockdown of the health crisis had stimulated innovations in thinking, amongst teaching staff, learners and businesses, creating some space, and unique conditions, to test and trial new blended learning models as a response. For example, the National College for Creative Industries had used the time to develop new programmes such as one for creative entrepreneurs. It was felt this would be important far beyond the post-covid recovery period.

Sector-specific all age skills developments

With the increasing move to technologically enabled ways of working, as well as the digital sector being an important creative growth industry, some stakeholders particularly valued the contributions provided through *customised, sector-specific programmes*. Some of these were nationally inspired and funded albeit locally designed and delivered. One *such example is the local Digital Skills*

Partnership run by SELEP. With direct funding by DCMS, this is part of a new network of around 6 DSPs across the country, bringing together digital expertise from businesses, education providers, public sector organisations and the charitable sector to design and deliver digital programmes and services to enhance digital capability across the region – this is offered to businesses as well as residents locally. By working with Google, IBM and local digital SMEs, the SELEP DSP has already been able to offer a wide spectrum of support since it was established in 2019, ranging from basic digital skills such as getting online for the first time, to more sophisticated training to take up digitally focused roles such as coding and building websites. The programme has clearly been able to embrace skills priorities across the skills pipeline, supporting young people and adults, in general cross cutting skills, as well as in specialist digital skills.

Interestingly too, having been established before the Covid-19 crisis, the DSP has become an important focal point for new funding streams and hence advancing digital skills to support a post-pandemic recovery. For instance, during the crisis it developed free online services with access to around 4,300 courses to potentially 10,000 learners, working in partnership with the online Higher Education learning platform Coursera. *A key intention was to support learning career transitions especially to those affected by the crisis. As such, it has provided another important basis for learning within the local delivery infrastructure to exploit future policy developments.* With further funding opening up to regions through the national digital boot camp initiative, future opportunities to extend programmes locally were recognised.

Other stakeholders pointed to wider locally developed programmes becoming more dedicated to specific creative sub-sector skills that had been enabled by increased local flexibilities. It was hoped these might have wider applications and in turn benefits. In London, for example, devolution had facilitated more targeted work with industry leaders to try to more effectively meet skills shortages for creative sub-sectors. This includes a *London skills plan for the Screen Industries* and a £7m *Digital Talent Programme* (for young people aged 16-24 years old) to increase the quality and volume of industry-led training in London. As these become established, they may offer the potential for wider applications to other clusters across the Thames Estuary. With recent parallel developments to be initiated in parts of Kent in the screen industries, for instance, (to cement investment opportunities in and around Ashford, supported by industry bodies such as ScreenSkills), this offers one concrete example where investments may be more immediately accelerated elsewhere in the region.

Clearly too, there were wider benefits identified around *Creative Estuary*, funded out of the DCMS' CDF. While the Covid-19 pandemic had slowed down delivery across its different projects, local stakeholders still mentioned some of the positive outcomes attached to early developments, and had high hopes for the future – especially if a post-Covid-19 recovery could be supported. One example was in reference to key events such as *Estuary 2021, annual arts festival* – which forms one part of Creative Estuary.

Whilst the full interactive event has been postponed until the summer 2021, a launch event for Creative Estuary as a whole, conducted in the autumn 2020, was able to continue despite the pandemic. With around 300 virtual attendees, this was seen as a key enabling, communication and partnership mechanism, contributing to building the capacity, capability and profile of the TEPC project, as well as the pathway to the fuller Estuary 2021 itself. Such events are important in bringing together diverse stakeholders from creative businesses and cultural practitioners and artists with education, providers developers and investors across the region. It provides a basis to promote specific cluster-site activities within the Estuary, at different points in time, through a variety of media. Consequently, it aims to build the local creative identity, and with that investment to enhance future growth opportunities, including local skills action. The preparations for the Estuary 21 festival seeks to extend awareness and reach of these initial projects to wider global audiences, through featured installations, immersive story-telling, murals, and specific tours. Stakeholders already recognised the value of Creative Estuary, in building foundation activities which, in turn, were vital in enabling wider skills projects. But, whilst generally supporting enhancements in skills locally, Creative Estuary has also aimed to strengthen skills activities through its own customised programmes.

More specifically, *the Re:Generation 31 project*, organising job placements for Under 25s within the Creative Industries, was also said to be playing a distinct role, bolstering early learning prospects to nurture the future talent pipeline and attract diverse, younger talent into the sector. Although active steps to organise concrete placements had had to be postponed during the early phases of the pandemic, stakeholders reported that early activities were, once started, beginning to link local partners across providers and business communities, public sector organisations (eg Job centres) and charities. As such 15 placements were in the process of being established in 2021. This in turn had the potential to bring wider benefits by better connecting skills programmes, such as Apprenticeships with wider employment initiatives such as Kickstart, and joining up pathways and

opportunities. The long-term hope was that overall employment and skills outcomes would be improved for the Creative Industries over time supporting continuity in learning and employment progression. Such developments are therefore already considering ways to better, and more flexibly, support, smaller employers in the area, and to provide more varied work experience and skills opportunities for new potential entrants to the sector. A key intention is not only to better meet their business needs but enhance opportunities for locally disadvantaged individuals too. With the scheme covering wage costs, this has also provided an additional incentive to engage. With a year's extension given to Creative Estuary by DCMS, stakeholders have felt that current delays will not impede the achievement of these longer-term benefits. With an evaluation programme already integrated into Creative Estuary, this is providing a basis to learn from any innovation in employment and skills practices piloted through the project, and hence to support wider take up. Such initiatives while small scale, are valued sources of learning locally.

One further concrete example of responsiveness to national-led opportunities to *enhance the local creattech education offer and lifelong learning is also seen with the IoT initiative* (highlighted earlier). This is another important illustration of how the Estuary is already working to encourage stronger collaboration in the post-16 skills sector, which is bringing together further and higher education providers in the region, as well as employers. With ongoing commitments to this initiative in future, by the current Government, and subsequent commissioning rounds planned, there are broader discussions within the Estuary about submitting further bids to widen the IoT network across the area. As such partners are keen to share lessons from East London and to extend the IoT offer into South Essex and North Kent.

Local skills partners, said they were being encouraged *to share learning around skills delivery and course developments through provider networks more generally*, uniting colleges and universities, co-ordinated through the TEPC community. These networks were also being supported by the LEPs and TEPC dedicated projects like Creative Estuary. This was building the basis for stronger collaborations and was beginning to overcome and counter an initial climate of competition, which has built generally across the education sector in the past decade or so, especially with pressures on funding. Indeed, a future stated goal is to be able to bring together the full range of training programmes and creative subjects being developed, and delivered, across the region *into one offer or prospectus, advertising opportunities across the creative spectrum from Art*

and Design, Media and Broadcasting to Music and the Performing and Visual Arts. Its hoped this will help to facilitate and streamline access, not only to courses but funding support (that is, tracking future developments such as those around more flexible student loans), and encouraging better engagement amongst employers as well as individual learners.

Embracing evolving skills policy reforms

There was also evidence that institutions in the area were responding to growing opportunities offered by the developing technical education reforms, and trying to *buy-into the new programmes*, to strengthen both entry and progression routes in the sector. Indeed, local partners reported, for example, that they were *members themselves of trailblazers* shaping new Apprenticeship standards and/or had *refreshed local creative technical education programmes*. This is requiring local stakeholders to work strategically at a national and regional level, as well as locally, with the Creative Industry Partners in the new emerging skills infrastructure. This includes Partners already recognised by Central Government as members of the IFATE Route Panels, those involved in working groups for the Creative Industries Council (CIC) and/or those forming trailblazer groups. A number of relevant Apprenticeship standards have been developed with industry partners.¹¹⁵

Furthermore, whilst many of the local providers have already established a strong track record in working with creative businesses, and have well established technical portfolios of industry-recognised courses and programmes, they were also *responding to Government run registration programmes attached to the technical education reforms*. Indeed, there are a range of providers already registered for the delivery of apprenticeships, who can now run technical education programmes in the region. These include not only public assets such as FE colleges and Universities such as South Essex College, North Kent and Mid-Kent College, but ITPs too such as Access Creative College, Big Creative Education, All Spring Media and the Bauer Academy, for example. This means that many of these now have Government recognition as well as being industry accredited (through schemes such as Select run by ScreenSkills).

With the developments in higher education of Degree Apprenticeships, this also includes local universities such as Ravensbourne University London and the University of Kent. These are offering higher degrees and Degree Apprenticeships relevant to the Creative Industries in cross-cutting areas such as

management. Some of the courses at Ravensbourne University for example were again responding to the employment and skills requirements of growing creative sub-sectors in the economy including: a BSc Digital and Technology; BSc Broadcast and Media Systems Engineering; Advertising and Media Executive (level 3); and Junior Advertising Creative (level 3). With Government's public commitments to support moves by universities to test and trial more flexible, modular alternatives in future to the traditional academic routes such as the three year degree, there will be futures opportunities to grow such programmes in the area. This includes considering options for more course at higher levels from 4 to 5.

Box 13: Degree apprenticeships - University of Kent

The University of Kent is running an evolving programme of Higher and degree apprenticeships in partnership with employers. One particular cross cutting area that can offer potential for creative businesses is the Chartered Manager apprenticeship. This is underpinned by the Chartered Manager BSc at Kent and runs for four years. The programme is being offered for those individuals with a range of management responsibilities including for people, projects, operations and/or services to deliver long-term organisational success. After completing the apprenticeship the Professional manager will be capable of managing complexity and will obtain leadership responsibility for setting and delivering organisational objectives through a wide range of functions.

Modules covered through the course include: Digital information systems; business analysis tools; financial accounting; human resource management; strategy analysis and tools; new enterprise development; project management; research and consultancy methods; global business environment; business ethics and sustainability management; introduction to marketing; leadership and management development.

Source: www.kent.ac.uk

That said, the specialist nature of creative education and technical training does mean that not all the providers training the local population are located in the Estuary itself. Indeed, many have sites operating out of London and/or other parts of the UK, for instance, which connect to the local labour market within parts of East London, South Essex and/or North Kent. Members of the TEPC provider network such as the National College were already training learners in other parts of the country and expected this to increase following changes in practices and individual and business demands in a post Covid-19 world. Indeed, with a growth in modern blended learning methods, and online training across the skills system, which has been accelerated by the Covid-19 crisis, this may

¹¹⁵ New apprenticeship standards pertinent to the region include roles such as a Cultural learning and participation officer; Registrar (creative and cultural); Cultural heritage conservator (degree); Museums and galleries technician; Cultural heritage

conservation technician; Archivist and records manager; Assistant puppet maker; Scenic construction technician, Scenic artist; Hair, wigs, make-up and prosthetics technician; Costume performance technician.

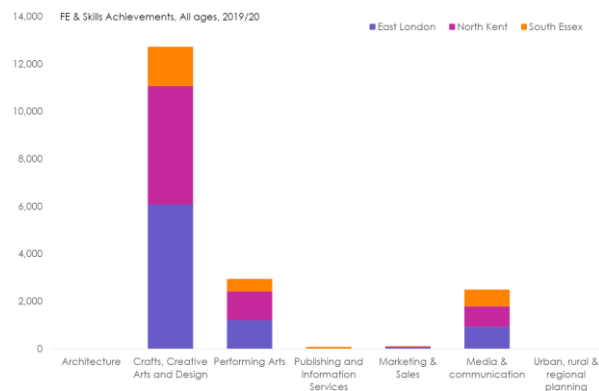
enhance opportunities for learners to engage with more specialist providers outside of the region in future.

Protecting patterns of creative participation

We have explored current patterns of participation in post-16 creative further education and technical skills up to Level 6 across the Estuary to understand the shape of the talent pipeline in more depth, scale of demand and to consider the implications for the future.

This also makes it possible to get a sense of the potential effects of ongoing policy reforms in the area – that is the scale of future demand and how patterns of take up might change between different education pathways. This closer analysis has highlighted a significant demand for traditional Applied General Routes in creative subjects across the Estuary, with 18,364 achievements from Level 1 to 6. That said, it has confirmed national trends which have seen a concentration in take up at lower qualification Levels.

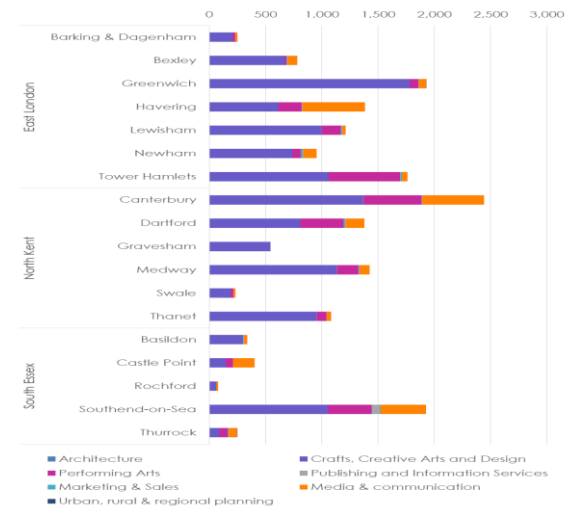
Figure 8: FE & skills achievements in the Estuary



Source: ILR 2019/20

Indeed, most achievements were in qualifications at Level 2 and 3, with 66% at Level 3 and 19% at Level 2. In line with the Augar findings, therefore, given the stronger more traditional pathways, from Level 3 into further study at universities, very few achievements in the region have been obtained in creative subjects at Level 4 and above.

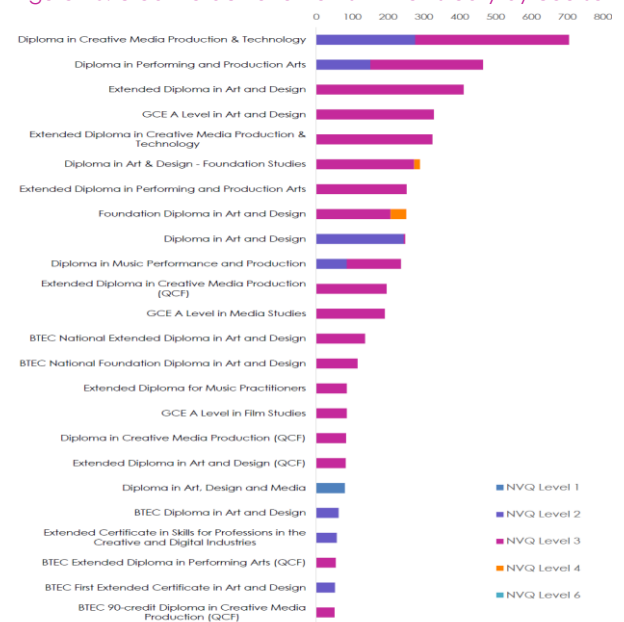
Figure 9: creative achievements by sub-region



Source: ILR 2019/20

A more detailed focus of the subject areas which Applied General Courses are most in demand – these types of courses dominate the top ten of achievements. More specifically, we see that the highest achievements are within the Diploma in Creative Media Production and Technology, followed by the Diploma in Performing and Production Arts.

Figure 10: creative achievements in the Estuary by course



Source: ILR 2019/20

It shows that, out of the total FE and skills achievements in the region, most (69%) were within practical, work-based courses in Craft, creative arts and design. This was then followed by Performing arts (16%) and Media and communications (14%). In line with the labour market composition, most of the achievements (45%) are delivered by providers within East London, followed by North Kent (39%) and then South Essex (16%).

This is perhaps unsurprising given the growing presence of these sectors in the region, and within some of the more significant clusters in Purfleet and Here East. In addition, the GCE A'Level in Art and Design is also amongst the highest achievements – ranked 4th in the distribution, despite the level of take-up generally in A'levels having seen a significant decline in recent years.¹¹⁶

4.3 Delivery challenges

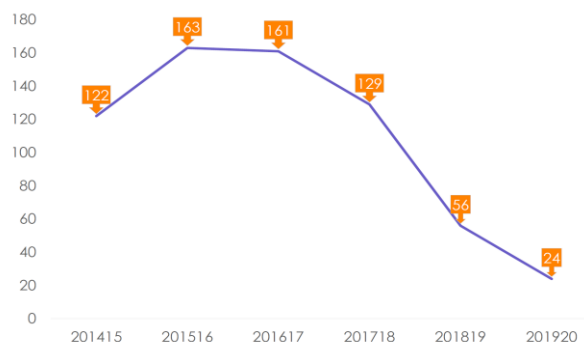
Whilst the review has identified some distinct sector activities, in response to changes in local creative needs within the Thames Estuary skills system, and there are positive developments connected to the ongoing education reforms, the research has also identified a number of significant challenges that stakeholders are seeking to overcome. These will be important for local partners within the TEPC to work through with Government moving forward. This is especially, if the region is to enhance its ability to provide the most effective skills offer for the Creative Industries within the Estuary and hence to meet the sectors long term strategic skills objectives – that is for a steady pipeline of talented individuals to get in and on in the creative industries locally. It's to these we now turn.

Low patterns of participation

One particular area of concern highlighted by stakeholders related to the low levels of participation and engagement amongst creative employers and individuals in the Government's flagship technical education programme; that is the *new Apprenticeships*. In contrast to the traditional well established Applied General Technical programmes delivered in the region, the take up of the new Apprenticeship standards was very low, albeit growing from a very low base in the Creative Industries across the economy as a whole. Indeed, in 2019/20 there were only just over 1,000 starts nationally across England for creative areas included for example in the Arts, Media and Publishing subject group and 500 achievements.

But, perhaps more worryingly, this has meant the new Apprenticeship programme, which had been brought in by IFATE to improve on the traditional Apprenticeship Frameworks, still had lower levels of engagement several years after its introduction, despite attempts to develop some new creative standards. So, in 2015/16 there were higher apprentice achievements (163). But by 2019/20 when the old frameworks were switched off, and only the new standards were deployed, numbers plummeted to 24 – see figure x.

Figure 11: creative apprenticeship achievements in the Estuary over time



Source: ILR various years since 2014/15 to 2019/20

Consequently, we have seen levels of participation overall falling over time, and the reform programme, therefore has not countered these falls, with the alternative, “newer” pathways. More specifically, this has highlighted a number of design and delivery issues regarding the Apprenticeships that the research has needed to explore (below).

As a result, the take up of new technical programmes such as Apprenticeships is failing to make the progress intended by Government, especially in creative areas, despite funds being diverted to these new programmes. Furthermore, *with ongoing Government reviews of broader qualifications, and potential rationalisation of alternative established creative vocational/technical courses at the same time, this has risked making participation rates even worse, and undermining future entry into the sector.* Stakeholders within the Thames Estuary voiced concerns about the potential detrimental impact of recognised programmes being switched off before new programmes were ready such as at Level 4 and 5. Relatedly, they feared this hampered the ability to resolve a number of deep rooted and persistent skills deficiencies for the Creative Industries in the region, especially where future funding limited alternative well-recognised education and training pathways (such as wider Applied General routes). Local labour market evidence shows that these skills problems were evident, even before Covid-19. But, in the context of the current crisis, on the back of ongoing changes in industry skills needs, this has further enhanced the risks that these skills deficiencies will worsen and could impede long-term economic recovery.

Persistent creative skills deficiencies

The PEC has reviewed a range of evidence pointing to pressing and persistent skills challenges across the Creative Industries to understand this picture further¹¹⁷. Indeed, recent skills surveys have shown 42% of creative employers nationally¹¹⁸ have

¹¹⁶ Carey et al (forthcoming) creative skills monitor 2020-21.

¹¹⁷ See for example Giles et al (2020) creative skills monitor.

¹¹⁸ Spilsbury et al (2019) The migrant and skill needs of creative businesses. [Creative Industries Policy & Evidence Centre \[pec.ac.uk\]](https://pec.ac.uk/)

reported skills issues (40% of employers in London and 33% in the South-East), where they struggled to recruit people (for new roles or to replace staff that have left) with the required skills; or where staff lacked the skills required to do their job effectively and meet business needs.

Skills deficiencies, in particular, are affecting the ICT and digital sector and Games, Film and TV (including 'VFX and Animation') and parts of the Performing and visual arts. These are all areas with a significant presence in the Thames Estuary. The Migration Advisory Committee (MAC) includes in its latest Skills Shortages Occupation List¹¹⁹ the key occupations that this involves: Designers of various types, including Games Designers (included within 2136: Programmers and Software Development Professionals); UX and VFX Designers (part of 2137: Web Design and Development Professionals); 3D artists, animators, VFX artists, storyboarders; and a whole host of other roles included within the Artists code (3411).¹²⁰ In addition, dancers and musicians¹²¹ are also listed.

When it is considered that the Creative Industries workforce is highly international, this potentially raises further skills concerns. Indeed, the collective effects of Covid-19, Brexit and changes in immigration rules, may inhibit the ease with which migrant workers can stay in the UK in future. Given, in turn, that many international workers are employed in some of the highly skilled and specialist creative roles, where skills deficiencies are more prevalent, this could reveal a further, more *significant latent skills demand*, when they leave. For instance, in London, 52 % of businesses employed at least one non-UK worker, compared to a national average of 22%, so the scale of the international workforce at risk is considerably higher than the economy as a whole, in parts of the Estuary.¹²²

Covid-19 has undoubtedly suppressed labour market needs overall over the last year, and many areas of the Creative Industries have been severely affected. But, equally some areas such as gaming have been thriving and the crisis has unlocked innovation too, across the sector which has kept other businesses afloat. Furthermore, as the recent OBR forecasts point to an economy bounce back by mid 2022, this raises an increasingly pressing challenge of how to deal with this persistent, underlying latent skills demand as the economy opens up – in other words as the creative economy bounces back so will the

skills deficiencies unless corrective training and skills development is started now.

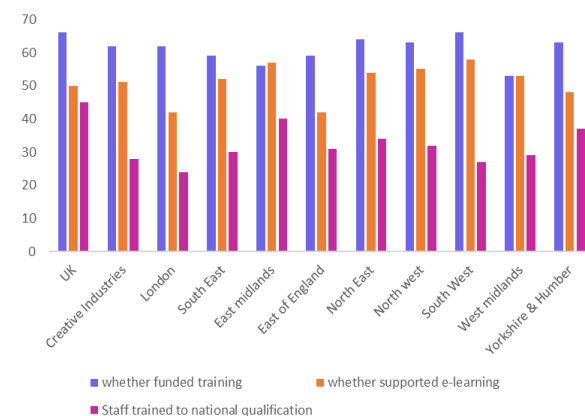
Local labour market evidence drawing on the UK Employer Skills Survey, alongside wider sources¹²³ shows the main skills lacking are specialist skills or knowledge to perform the role (68% of those with a skills shortage vacancy - ssvs), advanced ICT and digital skills (53% with a ssvs) and transferable skills (eg 43% ability to manage own time and 38% customer handling). Other evidence (such as from Cultural and Creative Skills)¹²⁴ also mentions the importance fundraising and leadership skills, especially amongst sole traders and micro-businesses.

With just under half (44%) of employers in the sector recognising they are not meeting their training needs, and wanting to do more, *this highlights an additional priority area for action – that is working with those local employers who have already acknowledged a need to change*. The outbreak of the Covid-19 pandemic has only made this more urgent. Local partners building closer relationships with employers in the local economy, have recognised that the effective customisation of local skills programmes requires a deeper understanding of creative businesses attitudes and commitment to skills investment and the training of their workforce.

Employer management practices & investment in skills

Patterns of participation have been partly explained by the nature of creative businesses management practices and levels of employer investments in skills and training. These practices are embedded and hence hard to shift.

Figure 12: creative businesses skills investment



¹¹⁹ MAC (2020) Review of the SOL. [Review of the shortage occupation list: 2020 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/86442/Review_of_the_shortage_occupation_list_2020.pdf)

¹²⁰ Technical artist • UI artist • VFX artist • Character artist • Junior animator • Lighting artist • Storyboard artist • Concept artist •

Layout artist • Previsualisation artist • VFX production coordinator.

¹²¹. The current requirements for musicians on the SOL is; "skilled orchestral musicians who are leaders, principals, sub-principals or numbered string positions, and who meet the standard required

by internationally recognised UK orchestras (including London Symphony Orchestra, London Philharmonic Orchestra, Philharmonia Orchestra and Royal Philharmonic Orchestra)".

¹²² PEC (2019) [The migrant skills needs of creative business in the UK](https://www.pec.org.uk/publications/the-migrant-skills-needs-of-creative-business-in-the-uk/).

¹²³ Giles et al (2020) Creative Skills Monitor.

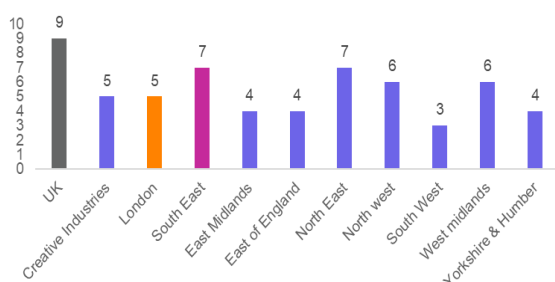
¹²⁴ CCS (2018) Building a Creative Nation.

Source: Employer Skills Survey 2017

Reference was made, for example, to the *historically low levels of training and development in the creative industries as highlighted in local labour market assessments, supporting ongoing progression development and lifelong learning*. While there is some variation by firm size and sub-sector, employers across the sector were reported to be far less likely than average to have offered training for their staff on a range of training measures. Indeed, only 59% of Creative employers in the South-East and 62% of Creative employers in London funded any training in the last 12 months (which is below the UK economy average at 66% and Creative Industries average at 62%). In turn, their employees working in the sector responding to individual surveys were also less likely to report having received training.¹²⁵ Engagement in new modern forms of e-learning were similarly at lower levels, and there were few employers deploying nationally recognised qualifications to acknowledge skills attainment through learning. It was also of concern that training levels, on a range of measures have been in decline over recent years, despite growing skills demands in the labour market.¹²⁶

Lower training levels were clearly a feature of broader management practices. Indeed, low proportions of businesses were adopting a wide range of high performance working practices (HPW), which drive a more people-centred management approach. A comprehensive approach to HPW was only seen in 9% of creative businesses as a whole and was at lower levels in London and the South-East.

Figure 13: creative businesses take up of HPW



Source: Employer Skills Survey 2017

Further, a closer look has revealed that there were also low levels of engagement in different parts of the skills system. For instance, in alignment with the student participation figures discussed earlier, business data shows the take-up of Apprenticeships remained at 2% of creative employers in London and 5% for those in the South-East. This is lagging behind national levels (which are also quite low

highlighting that only 10% of employers across the economy as a whole offer Apprenticeship opportunities). This therefore provides further insights into the low participation numbers in education and training.

Furthermore, local labour market information shows that those Creative employers that do provide Apprenticeships are more likely: to do so for new staff; are of a shorter duration; involve working with commercial providers; and they have only begun to engage with Apprenticeships more recently. Stakeholders also raised concerns that Government's focus on higher-level Apprenticeships and levy-paying employers has increased the risk that minority groups and smaller employers are being excluded and hence the full potential of what apprenticeships can bring is not being realised.¹²⁷

While the levels of Creative employers engaged in and offering work placements were higher according to survey data (at around 44% of creative employers compared to 38% for the economy as a whole), which is a critical component of technical education, they still form a minority of Creative businesses across the sector overall. That said, where Creative employers were taking on education leavers, the majority of those recruiting from colleges and universities did find them well prepared for work – indeed 68% of employers who recruited college leavers find they are well prepared for work and around three quarters of those taking on higher education leavers.

However, this positive perspective did not enhance extensive partnerships between Creative employers and education and training providers more generally across the skills system. For instance, most employers if they accessed training externally, said they worked with commercial providers (ie 43% of Creative employers in London and 51% in the South-East) with only 4% of Creative employers in London and 2% of employers in the South-East working with the FE sector. This compared to only 5% of Creative employers in London, working with HEIs and 1% of employers in the South-East.

That said, on a more positive front, the total training picture was not entirely clear cut. Indeed, a more detailed examination revealed that many non-trainers (66%) may still be supporting learning, albeit more informally and/or driven by the individual's self-motivation. This is perhaps unsurprising given the high levels of self-employment, smaller businesses operating in the sector, and the nature of working patterns, which are often more project-based and

¹²⁵ Giles et al (2020) Creative Skills Monitor.

¹²⁶ Giles (2021) [Employer Skills Survey 2019. Skills Bulletin 8.](#)

¹²⁷ OECD (2021) Future-proofing adult learning in London

highly flexible, and can inhibit training off the job and in traditional ways. Whilst there is a significant challenge to overcome in that many of these activities are “invisible” and are not, therefore, recognising or accrediting the skills and knowledge updated to ensure it is of a consistent standard and quality, it does suggest that there may be more of an appetite to learn than suggested by the headline figures.

When this is combined with the fact that two thirds of training employers in the Creative Industries had provided or organised training via digital tools, online learning, e-learning or self-learning over the last 12 months, it starts to *offer insights into how to stimulate wider engagement in learning and skills development – that is through more flexible delivery options, that work with the prominent working patterns of those in the sector, and provide room for more modern, modularised, digitally enabled, blended and online learning.* Local providers talked about the wider potential here. These opportunities have clearly been accelerated with the Covid-19 crisis.

So, partners felt it was crucial to work more closely with employers and their workers in future across the Creative Industries to learn more about varying patterns of training behaviour, and training needs, and indeed how this was shaped by broader management practices. This was crucial if levels of engagement in skills programmes were to be enhanced and lifelong learning supported. Local providers understood that current attitudes towards different types of skills delivery, are very much shaped by the composition and needs of the sector. This calls for significant local flexibility in future to enable local partners to adapt and deliver technical education and wider skills programmes in ways to incentivise more employers and individuals in the creative industries to take part rather than to be driven away. As such, *there was a general feeling that national programmes needed to provide more room for local tailoring, building on the shape and nature of actual education and industry partnerships and local intelligence and knowledge.*

We explored the practical issues affecting institutional operations and skills delivery to understand what steps local partners were taking to effectively develop and deliver high quality skills programmes. More specifically, this sought to understand what was getting in the way of providers being more responsive to Creative Industry needs and enhancing future participation and engagement in the ways they desired.

Institutional challenges

Various providers we spoke to supported steps to repurpose and reinvent the skills system in future. This was especially at a time of growing uncertainty and change. This acknowledged the vital

contribution that education and training providers make in driving economic recovery and growth at the cold face of delivery. But, support was conditional on needing to address ongoing *institutional operating* and *skills delivery challenges* that are centrally determined and can reduce the authority to act locally.

In such a context, there was support for moves towards *a whole-skills system approach that would enable colleges, universities and other providers to work more effectively together towards local strategic goals, rather than in competition.* This offered the potential to build on local partnerships already established with wider local players such as the LEPs and local authorities in the development of regional action plans such as the TEPC. It therefore provided a basis to enhance engagement with employers and individuals in the region, to clarify how local skills needs can be met, alongside national needs, and, by so doing, to be more responsive to labour market changes. Indeed, individual institutions could in principle outline their contribution to the whole.

But, it was recognised that nationally set governance frameworks needed to be flexed to allow this in practice. This was especially given the view that employers and individuals as “customers” have growing expectations as they contribute more to education provision through fees, and wider funding measures such as the Apprenticeship Levy. This therefore presented increased challenges operationally for different education providers to *ensure they had genuine space and flexibility to meet more exacting expectations.* In light of this, there was significant frustration with the prevailing conditions, in which institutions currently operated, and many obstacles were highlighted that *inhibited local autonomy and effective action in practice.*

Challenges were reported right across the skills system. Stakeholders highlighted frustration with the *endless cycles of policy change and reform*, which interrupted policy continuity locally, displaced resources, constrained long-term planning and in turn impeded the effectiveness of local action. They referenced the lack of a coherent structure or framework within the post-16 skills system, with clearly defined and considered roles for different education providers locally, across different parts of the education pathway, thus enabling stronger collaboration and partnerships between schools, colleges, universities and ITPs working within the TEPC. As such, there was a sense that where local partnerships were working, and local leadership was growing, this was in spite of, rather than supported by, the system.

As policy announcements were made on an incremental basis, it was felt this created *tensions*

between national and local priorities, and understanding the sum of parts. As a consequence, reference was made to a poor, and often conflicting, alignment between national policy priorities and the local commitments of colleges, universities and wider providers seeking to respond to local institutional needs. This risked undermining and displacing already limited resources, and attempts to shift the dial, especially on some long running and deep-rooted issues in areas such as productivity, Levelling Up, and inclusive growth. This was compounded by the absence of an up to date national skills strategy from 2016 to 2021. Over this period, it was noted there had been various changes in the shape of Government, ministerial responsibilities, and funding and oversight bodies, (seen with changes from BIS to BEIS and the DfE and from, SFA, and HEFCE to ESFA, and OfS) which had added to the perceptions of policy turbulence.

“Success seems to be increasingly measured in terms of the volume of announcements rather than the difference they make in terms of improved outcomes”

Relatedly, stakeholders raised the *challenges of the current governance and performance institutional frameworks* for colleges and universities. It was felt attempts by Government to constrain overall public funding levels for providers and to meet changing national policy agendas, was focusing available funding and accountability on short term and/or narrow input and output measures. This worked against long-term strategic outcomes. It also forced providers to operate in a quasi-market and to compete with each-other for limited resources or potential students, rather than working to overarching goals for a geographical area or region. Whilst historically this has been more of an issue for further education colleges, and private providers, universities are increasingly concerned about future pressures on funds too.

With changes in financial accounting for higher education loans, the scale of the public subsidy has become more visible, and with that the exposure of Government to unpaid student debt. Traditionally, universities have been able to rely on public funding top-ups to subsidise student fees in high cost subject areas through the funding system, such as in creative subjects, and cross subsidies for teaching between other areas such as research and the recruitment of international students. But, with the higher education funding system being under review, funding is far less certain. As the Government increasingly moves towards a strategy of prioritisation within HE, and cuts are likely in areas it considers to be less strategically valuable such as creative education, this has caused some concern across the HE sector, at the time of the study.

Specific reference was also made to a decade of public austerity, especially since the global crisis of

2008, which had placed increasing pressures on funding levels overall, due to a period of funding cuts. Covid-19 was clearly seen as making a hard situation worse, as providers absorbed the additional pressures of supporting students as they managed public health measures and the movement and delivery of services and facilities on-line. The effects of Covid-19 and Brexit were also raising questions about the viability of additional income streams for universities through international students.

The situation was thought to have been compounded by the *complexity and short term nature of the education funding regime*, largely focused on annual cycles. Annual grants based on student numbers were subject to variation, from year to year and within year, especially in the case of colleges, pending student continuation and completion rates. New skills programmes such as Apprenticeships, were adding to this complexity, often having their own separate funding streams to be managed rather than being integrated into the overall grant.

Funding was further complicated by variations in entitlements by types of courses and the age (or wider characteristics) of the learner, which were thought to be too rigid. It was *often difficult for providers to square the circle between the local learning and skills demands of individuals and employers with funding incentives. This was especially for older individuals, who were wanting to pursue alternative careers and to top-up or repurpose their skills later in life.* Public funding was often only available for those individuals that lacked qualifications and therefore excluded adults already in work, wanting to pursue in-work transitions, and to access short courses to fill gaps in knowledge and skills. Providers expressed huge frustration that they could not support many individuals and smaller employers locally who did not have the financial means to pay for the full cost of training. This risked large numbers of people becoming disconnected from the labour market and failed to embrace the realities of industrial restructuring and the need for significant investment in reskilling and up-skilling as originally envisaged in schemes such as the National Retraining Scheme. It therefore also raised risks in tackling skills deficiencies.

Stakeholders felt providers were increasingly being incentivised to focus on provision that is less costly, efficient and financially viable, and therefore low risk, encouraging a focus on areas of more *sustainable student demand* - that is measured by higher completion and continuation rates, and hence lower drop-out rates. There has been a concern that this threatens growing skills priority areas locally such as in creative subjects, and therefore, undermines attempts to respond to local

needs and widen and deepen participation and engagement. This is especially in relation to engaging more *“hard to reach”* groups in niche markets and *isolated, rural locations* and/or providing *specialist training* for smaller groups, such as SMEs.

In this context, there were wider policy developments and funding changes threatening the future education progression pathway for the Creative Industries. For instance, concerns were also raised about recent policy decisions affecting the funding of vocational subjects such as in creative further education, for subjects at Level 2 and 3, and including the new Level 3 lifetime skills guarantee. These have sought to *simplify the system* by *directing funding to in-demand and priority subjects and in so doing have offered further examples of deprioritised creative subjects vital to the Creative Industries*. These actions have potentially cut off long established Applied General Progression routes well recognised by the sector. When combined with funding pressures over HE, this has further heightened concerns. This is especially if proposals currently being tested to restrict funding and policy developments within HE to a narrower range of priority subjects, such as STEM, are followed through. Such developments clearly risk future participation levels in deprioritised creative subjects, and hence the likelihood of disrupting the future talent pipeline into the sector further.

Financial uncertainties were thought to be further aggravated by the increasing use of short term funding pots (such as the National Skills Fund and the Strategic Development Fund) to cover core programme costs, which put the long-term future and hence the sustainability of activities related to them at more risk. This is seen, for instance, with recent announcements also suggesting that the financing of part of the lifetime skills guarantee will be provided through the National Skills Fund. Concerns about the sustainability of public funding for this skills activity, relate to the fact that the fund has a life of only 5 years. Furthermore, such funds can clearly be cut, and changed, at short notice.

More widely, the challenges this presents are evident in a *“patchwork quilt” of local initiatives, presenting a mix of fluctuating, customised and mainstream initiatives and programmes*. With many of these only running for a fixed term, this raises problems of ensuring continuity in practices over time and enabling consistency in local skills support of the sort that is more likely to overcome skills issues and enhance local skills impacts.

Institutional leaders therefore reported that they are all-too-often wrestling with the means to survive, and/or protect valued skills programmes, rather than the broader strategic long term needs of the local economy, community and indeed the broader skills system. Local frustrations were clearly

evident as colleges, universities and ITPs work to retain a sufficient focus: advancing relevance, quality, standards, and value for money; maintaining the levels of educational attainment; and ensuring the responsiveness of provision. But, in turn, there was a desire to protect long term aspirations around the core local objectives, that is: supporting early entry and preserving education pathways; driving skills and employment progression in key sectors such as the creative industries; and enhancing and widening access routes, supporting in-work transitions.

Of course, the Government is still considering the governance and funding of further and higher education, following the Augar review and in the run up to the CSR in the autumn 2021. It is looking at ways to offer more flexibility and autonomy in some parts such as multi-year funding settlements for colleges to give local institutions more space to act. Furthermore, it is reviewing Local Skills Improvements Plans and how to support and enable the local institutional infrastructure. But, whilst the outcomes remain unclear, and with significant and mounting national debt, this still leaves much institutional uncertainty.

Problems with implementation

Further challenges were identified around skills delivery and programme implementation. On one reading of the patterns of participation, it was felt to be understandable that such a *substantial programme of reforms in the skills and education system over the last few years will clearly not have an immediate, over-night effect*, and hence growth in take up. Indeed, as highlighted earlier, the Post-16 Skills Plan in 2016 was reported by the then skills minister as *“the most ambitious post-16 education reforms since the introduction of A-levels 70 years ago”*. Similarly, the present Secretary of State for Education has called the current reforms in the Skills Strategy white paper 2021 *“pioneering”* and said that they *“are set to revolutionise post 16 education.”* In such a context, skills systems are complex and, therefore, it will inevitably take time for new skills programmes and initiatives to be fully understood, new infrastructures to establish, for traditional behaviours to change and for fresh engagement to be stimulated, so these new patterns of participation can embed. Yet, local stakeholders raised concerns about *how the reforms are being too centrally driven*, which they felt were hampering its progress and overall effectiveness. Indeed, many highlighted problems associated with the *incremental and fragmented approach* to implementing reforms, with frequent policy announcements around new developments. It was felt this had added to system complexity and raised the potential for confusion about *“what the current system was”*.



An *incremental programme of ongoing change in the medium term was seen to be working against strategic goals to support system simplification and to enhance progression routes*. Some policy decisions were thought to be too atomised and this impeded co-ordination and alignment across the system. For instance, funding decisions over *priority, in-demand* subjects affecting creative subjects in further education did not align with decisions in higher education. This meant pathways, especially through technical education risked becoming more fragmented and disconnected, thus inhibiting progression.

Furthermore, *education policy decisions were also thought to be in conflict with Government commitments to the sector elsewhere*, which again could impede local aspirations and delivery. For instance, reference was made to the fact that the Industrial Strategy in 2017 (and latterly the Plan for Growth in 2021), and hence broader economic, enterprise and innovation policy, recognises the importance of the Creative Industries to the UK economy. This was evident through investments such as the dedicated Creative Industries Sector Deal and Creative Industries Industrial Council – of course for the region Creative Estuary was also further concrete evidence of that. There was clearly then a tension between a strategic, cross government recognition for the importance of creative education and skills but this was *not* being followed through in skills delivery at a grassroots and institutional level.

Again, the absence of a refreshed national skills strategy from 2016 to 2021, was believed to have aggravated this situation, as it had been challenging to understand how different reforms introduced at a local level, or at different points in time, have worked together as part of *"a joined-up system"* the Government has stated it wants.

Relatedly, concerns were raised about *the time the reforms were taking to implement – some would say too long*. The wider turbulence in the external environment due to Brexit and the advent of the Covid-19 were also reported to have added to the complexity of this situation.

For instance, it was felt the fall in Apprenticeships was partially due to the fact that not all the parts of the system had been established, and reforms had been underway since 2016. Reference was made to the long lead times to co-design and approve new Apprenticeship standards with groups of employers, and put them in place. The old frameworks were only switched off in 2020, and many standards were reportedly still to be developed. There was concern that not enough allowance was made for the time it takes for local partners to establish and implement the Apprenticeship programmes locally. That is: identifying which providers have been registered by DfE to deliver the programmes; confirming there are end-point assessors authorised by the system to assess the training; and then encouraging local employers to place new apprentices and take part.

Ongoing centrally-driven changes to the delivery infrastructure were also thought to impede progress, displacing resources as stakeholders adjusted, and inhibiting continuity in policy and practice locally. *The complexity of change and full implementation was often under-estimated*. For example, whilst there was now opportunity for the region to benefit from a repurposed National College for the creative industries, it was noted how long the policy had taken to create and establish, being first announced in 2013. The implementation pathway for the National Colleges Initiative across the country as a whole, had perhaps been more complicated than originally foreseen by Government, and indeed had not been trouble free as a result. Clearly such developments offered an opportunity for learning, and strengthening the future delivery infrastructure such as in the context for IoTs for example. But, it was stressed that this would only happen if there was a *recognition of the value of having an institutional memory*, and drawing lessons from the past, even if programmes had had a different political orientation originally.

Relatedly, there was a question about whether such initiatives were of adequate scale and hence sufficiently resourced and funded from the outset to then deliver.¹²⁸ The recent evaluation for National Colleges for instance pointed to the lack of central support and funding from DfE in helping the colleges to get established in the form of start-up grants. Local partners had had to wrestle with a host of quite complicated delivery challenges this presented, whilst managing high policy expectations. This has therefore undoubtedly limited the ability to accelerate and scale up the achievements of outcomes in practice until now.

Furthermore, although the IoTs were announced as an initiative in 2016 to strengthen higher technical education routes, the first wave of actual institutes did not actually open until autumn 2019, with

¹²⁸ Industrial Strategy Council (2021) Annual report

subsequent waves still being reviewed and not yet confirmed or launched. The timings of such developments have clearly affected the speed with which they have been able to respond to local demands. This has therefore raised some similar concerns about the challenges of marrying expectations with delivery complexities.

The Challenges of Employer Engagement

Another significant area concerned the policy intention of Government in the latest Skills Strategy, and Plan for Growth, to again consider how to *reshape the infrastructure for better engagement with industry*. This included, for instance, a review of LEPs and pilots to test and trial new engagement tools, including with the establishment of *new employer hubs and networks or local college business centres*¹²⁹. In that context it was noted that this was not the first time steps had been taken to *“put employers at the heart of the skills system.”* Some stakeholders referenced many industry bodies that had come and gone over the years to engage with industry more systematically, and represent the interests of their members, through their industry networks. These had moved from Industry Training Bodies to Industry Training Organisations, lead bodies, National Training Organisations, SSCs, and Industrial partnerships. Similarly, at a regional level there had been further changes with: Training and Enterprise Councils; Learning and Skills Councils; Employment and Skills Boards; Regional Development Agencies; and now LEPs.

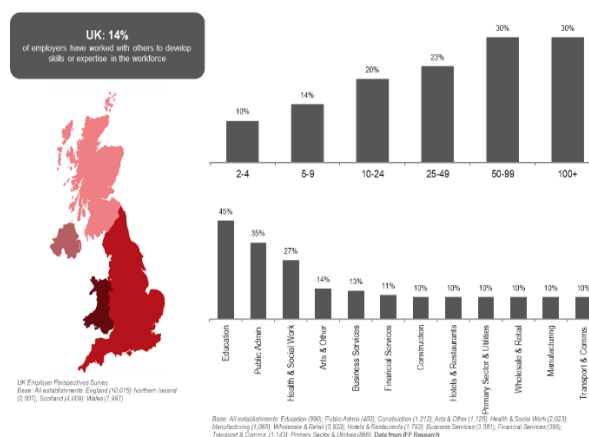
While there were still some organisations that existed as legacy institutions, such as some SSCs as we saw earlier, including for the screen industries (ie ScreenSkills), it was recognised how fragmented and piecemeal the skills landscape was more generally for strengthening and broadening employer engagement around skills. This was especially if the system was to move beyond skills solutions for individual firms. Local skills institutions discussed their individual employer engagement solutions. But, there were clearly limits to scaling up from these to ensure the needs of the Creative Industry communities locally, regionally and nationally were strategically met, and co-ordinated.

Some stakeholders highlighted the *progress that had been made over time, strengthening a range of local business networks across the region*, and it was hoped that future national policy developments could recognise and amplify what already existed locally - *“rather than throwing out the baby with the bathwater”*. Indeed, there was said to be many business communities supported by the LEPs in the region and/or local authorities. Some of these had been sector specific such as the *South-East Creative, Cultural and Digital Sector Project*.

Others were *more general and connected to the local growth hubs* (such as Business, Essex, Southend and Thurrock - BEST). There were also wider Business Partnership networks run by different local authorities, linked to those of broader partners (such as the Federation of Small Business, Essex Chambers of Commerce and its local hubs - in Basildon and Southend - and the SELEP's Growth Hub – ie the South-East Business Hub). These have already therefore provided the basis for practical action on the ground through the delivery of targeted initiatives and support services, co-designed with local employers, which could it was thought, by some, be extended to incorporate skills developments in future.

That said, it was acknowledged that there were challenges due to the lack of long running traditions of businesses working together to develop common sector-wide training and skills solutions – as seen for example in Northern European Countries such as Germany and Denmark. National surveys have illustrated the problem for the UK, pointing to very low levels of employer networking (with only 14% of businesses on average and 12% of creative employers nationally) co-designing skills programmes across business communities such as for sectors.

Figure 14: Extent of employer collaboration around skills initiatives



Source: UK Employer perspectives survey

However, there were examples of existing programmes based on the principles of collective measures, mentioned earlier, which offered the potential to enhance business investment and strengthen employer networking in the region. These included the Business Rate Pool initiative in Thurrock and the Business Improvement District in Southend-

¹²⁹ DfE (2021) Skills for Jobs

on-Sea¹³⁰. That is, where business networks pool resources to co-create tailored programmes that can offer tailored business development and support services to meet the needs of those communities. These existing programmes had already co-invested locally in business networks to support a more vibrant entrepreneurial ecosystem, accessing events, and offering state of the art facilities and flexible workspaces, for example.

Whilst the current networks had not met the needs distinctly of creative businesses, or indeed considered skills, they have offered insights for how future programmes might be further developed and co-designed for the sector as part of the TEPC project. By drawing on this existing infrastructure and the experience of previous business support programmes for the creative industries (such as the SECCADs programme highlighted earlier), the region has key ingredients for growing a new re-purposed business engagement offer for the creative industries moving forward. Wider policy developments may serve as helpful enabling tools and can kick start action.

Indeed, with evolving policy developments connected to new funds, such as the National Skills Fund and Strategic Development Fund, this could provide concrete opportunities to improve the local delivery landscape for the creative economy. Wider new initiatives announced within the Plan for Growth such as the *Help To Grow* management scheme (HTG) may also offer further local potential in future to grow the capacity of local business networks and to strengthen their leadership and management and growth through skills. HTG will be available to local universities that have the Small Business Charter (such as the University of Kent) and could be important particularly in supporting SMEs in the region

One recent example locally, which might have wider future application across the region, has been provided by the GLA. It has deployed Covid-19 recovery funds to develop a series of *sector specific Skills Academies*, as part of its London Recovery Programme.¹³¹ These Academies are working closely with employers to better co-ordinate skills, careers and employment support and to ensure programmes are delivered to better meet local employers' needs, especially in those sectors hard hit by the pandemic such as parts of the Creative Industries. The one within the Creative Industries is targeting freelancers, many of whom have lost opportunities to work during the pandemic. The Creative Academy is piloting an ATA delivery model, which involves working with training

agencies as intermediaries to help freelancers navigate the skills system and better access the training they need. In short, the ATAs tend to recruit, employ and arrange training for apprentices on behalf of creative employers, thus doing much heavy lifting in terms of diagnosing and meeting training needs. In the context of the Government trialing more flexible Apprenticeship schemes, this may be a model that has wider regional application.

For many stakeholders, therefore, these developments highlighted a need to be more realistic about the complexity of initiating skills system changes and to place more of a focus on the practical challenges as well as opportunities of implementation. Changes can and do hugely displace resources, and it takes time to rebuild local capacity and capability and embed the new infrastructure to enable an impact on skills to take place. There was concern that many of these institutional infrastructures had not been maintained and that this would happen again. Reference was made to the intention of Government to revisit the LEPs' role, representation and geographical coverage, and it was hoped that this did not lead to further fundamental institutional changes, which risked undermining the strong partnerships in the region.¹³²

Sector specific implementation challenges

Finally, a number of the *implementation challenges outlined were sector-specific*. Indeed, there were concerns that too many of the nationally-led initiatives were inflexible in their requirements for different industries. In a rapidly evolving economy, *there were questions about the relevance and agility of the current system for key priority sectors*. This raised quite specific implementation challenges for the Creative Industries especially. Indeed, nationally-led initiatives risked inhibiting aspirations to customise courses and programmes to meet fast paced changes in local and/or sectoral needs. In turn, it was felt this raised the risk that the future skills system will fail to develop the skills the Creative Industries require, with fewer creative learners and businesses engaging.

For instance, whilst the Route Panels have been appointed to ensure technical education programmes are employer-led for some sub-sectors, creative employers still worry about gaps in provision which may impede future skills investment. In part this appears to reflect a lack of new Apprenticeship 'standards' for some job roles – such as in Film and TV. This has been backed by broader research¹³³. Furthermore, the staged introduction of new programmes is feared to be too slow for parts of the

¹³⁰ UKCES (2010) Review of Collective Measures. Final report. <https://webarchive.nationalarchives.gov.uk/20140108111042/http://www.ukces.org.uk/publications/er10-final-report>

¹³¹ OECD (2021) Future-proofing adult learning in London

¹³² [New levelling up and community investments - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

¹³³ Screenskills (2018)

sector. Indeed, T'Levels for the creative economy will not be in place until 2023. As funding changes, and some subjects are cut, especially well recognised Applied General courses, before others are in place, this may further detrimentally affect levels of skills provision and take up in future.

In addition, *the composition, structure and working patterns of creative businesses has presented quite distinct delivery challenges* in meeting the standard Apprenticeship delivery requirements, which is believed to be affecting take up. Indeed, given that the Creative Industries are dominated by SMEs and micro-businesses, and freelancing, with short-term and fluctuating project-based working, creative SMEs struggle to cover the cost of apprentice salaries for a consistent period or accommodate time away from the workplace to meet standard requirements such as the 20% of training that is 'off-the-job'. The 12 month contract rule can be difficult to commit to where companies work mainly on short-term projects and would only be able to offer sporadic work and training episodes. This has clearly added support for piloting more flexible Apprenticeship delivery in future.

Some stakeholders also questioned *the reliance on single exam-based, end-point, assessments*, especially if largely desk-based assessments. Wider creative subject areas, such as some of the existing Applied General Courses, have developed assessment processes, through the full length of a training programme, as a better basis to capture developments in the originality, quality and focus of the creative work over-time, and equally the building of practical expertise and capabilities. Single exam-based assessments can present challenges in fairly grading the multiple dimensions of creative projects, and if the regular assessments of providers and employers are not formalised this can inhibit moderation of the final outcomes. Due to such inflexibilities, SMEs have fewer employees who are eligible to undertake the training.

Similarly, *there were concerns that the design of T'Levels will also be restrictive as they start to come in from 2023, unless there is room for greater customisation for the sector*. For example, there are questions as to whether the standardised, 20% work placement component will be feasible, particularly in rural areas across the region, where there are limited numbers of creative employers. If colleges work with businesses further away this will of course have implications for running costs that need to be recognised for all involved partners. Furthermore, there are concerns as to whether businesses can ensure the health and safety of young adults when work is often irregular, episodic and/or outside of 9 to 5 hours. This might be further aggravated again

by the high proportion of micro-businesses who often have more limited capacity to support students to fulfil the requirements for 315 hours of training time over a continuous and un-interrupted training period. In this context, *greater flexibility could enable creative businesses to develop tailored options to work with local providers to support T'Level delivery and supplement college work with different forms of practical work experience*.

Another sector-specific issue identified locally related to the *network of available and registered providers for technical education and Apprenticeships*. There was some concern that the process for registering and updating providers was too slow and inflexible, and risked missing niche and evolving specialist areas. Other stakeholders, including creative businesses, questioned whether all providers currently fully understand the specialist skills of the sector, especially in new emerging areas. This aligned with wider research which has shown that where specialist training requirements are also for smaller business communities, and hence small pockets of learners too, funding rules can limit the ability of providers to respond cost-effectively, with clear, high quality "future-proofed" learning pathways to support entry and progression within the sector. As a result, this may limit over time the number of providers who can run commercially viable courses for shorter durations and at lower scale, risking persistent gaps in parts of the training market, and future skills deficiencies. Again, this is an area that will require detailed monitoring.

Others questioned *the value the Creative Industries are realising from their Levy contributions and how this is invested*. Unlike wider levy programmes run in other countries, highlighted earlier, or indeed some of the existing local business programmes, in the UK, employers have limited controls over how their investments are spent through the Skills Levy. While the Creative Industry Council forecasts that the sector will invest £75 million in Apprenticeships through levy contributions¹³⁴, research by ScreenSkills suggests that the sector struggles to spend a little over one quarter of that. Indeed, they estimate that around £35m is likely to be lost from the Creative Industries without additional flexibilities about how the funds are accessed by employers and spent¹³⁵. For instance, historically unspent levy funds have been reclaimed by the HMT after 24 months. Furthermore, funds, before that time has elapsed, can only be accessed by those employers registered through a digital account, and then can only be deployed for training against standards already recognised by the system. The focus on the

¹³⁴ Bazalgette (2017) Independent Review of the Creative Industries. [Bazalgette review sets recommendations for continued growth of UK's Creative Industries - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/618113/bazalgette-review-sets-recommendations-for-continued-growth-of-uk-s-creative-industries.pdf)

¹³⁵ [ScreenSkills \(2018\)](https://www.screen-skills.org/2018/05/24/levy-impact-report/)

levy-paying employers, has also risked de-emphasising the needs of smaller businesses. As such, this has perhaps not unlocked the step change in training behaviours originally sought by Government in 2016 when the Levy was announced. Indeed, the CIPD recently confirmed that nearly £2bn of employers' levy funds nationally expired and was returned to the Treasury between May 2019 and March 2021 because employers were unable to spend the money themselves on Apprenticeships.¹³⁶

Stakeholders noted that the Government has started to consider how to resolve some of these delivery issues. Indeed, a new *Apprenticeship pledge* is being introduced from August 2021, to allow employers who pay the Apprenticeship Levy to transfer unspent levy funds in bulk to SMEs in their sector, business network and/or supply chain. Whilst unspent funds will still expire after 24 months, the government intends to introduce, from August 2021, a new *online Apprenticeship service* to help match levy paying employers with SMEs that share their business priorities to increase the likelihood that funds can be spent as intended. It was hoped that the Government working with the Creative Industry Representatives and employers in taking forward its new proposals would be able to tailor solutions to better support employers in the creative sector - although at the time of writing the precise practical implications of this were as yet still to be determined. In addition, there was also some positive reactions locally to recent announcements to explore how to

offer greater flexibility in Apprenticeship delivery, with the government committing to test new delivery models in providing apprenticeships (such as ATAs), especially for SMEs, and experimenting with front-loading training for certain apprenticeship standards. While it was noted that these were medium term developments, that needed to be piloted, there was nevertheless great interest in what longer term benefits they might offer for creative businesses in the local area.

Concluding remarks

This research has provided a chance to explore what can be done by partners working together in a local area to strengthen actions around skills and to respond to the local needs of the creative economy more effectively. But, in an external climate, continually exposed to change, whether that's ongoing policy developments or the disruption of long running megatrends and unexpected by economic shocks, such as Covid-19, this clearly makes any response challenging. Indeed, there is limited room to standstill and partners must wrestle with how to unlock benefits and manage threats over time. Whilst economic drivers and policy reforms bring opportunities, they also bring uncertainty, and there are *many system constraints*, especially from nationally imposed policy measures, which can limit local innovation. We set out key future considerations in the final section, and options for optimising local skills outcomes.

Key takeaways

In an environment shaped by ongoing change, a key focus has been to explore with local stakeholders' how they are continually *evolving the local skills system to maintain its currency and ensure creative specialisms* are enhanced.

Skills partners across the Estuary were *actively responding to a transforming labour market*, as well as policy developments, anticipating changing skills requirements to keep programmes relevant.

Customised programmes were being updated to meet specific, new and emerging needs in sub-sectors and enhancing learning of disadvantaged communities, evolving flagship programmes in areas such as Apprenticeships. With a fusion in technology and skills, more joint, and multi-disciplinary, courses were being provided.

At the same time, however, there were also significant underlying problems still to address that left unresolved, risked persistent skills deficiencies in future. For instance, there were various nationally imposed *"system process issues and bureaucracies"* inhibiting local innovation and customisation and in turn institutional responsiveness locally. This was evident in rigid funding and governance frameworks for skills institutions, frequent central policy churn which risked misalignment between national and local priorities and inflexible centrally-driven programme implementation, limiting local and sectoral variations.

The Government's Plan for Growth sets out the long-term policy agenda, identifying over 180 policies¹³⁷. With additional policy commitments expected to be announced in the next 12 months, including a new sector vision potentially for the creative industries. This starts to set a long term context for this work and local priorities on which to build.

This means the policy landscape, including for skills is continually evolving. It is important any local skills response considers, and exploits, such developments, as a basis to pool precious resources and expertise and accelerate positive impacts.

¹³⁶ CIPD (2021) [Employers lose £2bn in unspent apprenticeship levy](#)

¹³⁷ Industrial Strategy Council (2021) Annual report

5. Final reflections & priorities for the future

5.1 Introduction

In this final section we bring the story together: recapping on what was done and why; drawing out final reflections; outlining the main conclusions around what has been learned; and offering insights about future areas for research and action.

A key out-standing question for local partners, looking ahead, is how best to act in future in the local skills system in the light of ongoing labour market and policy developments to enhance the skills offer for the Creative Industries in a local region.

We have explored through the research possible ways to enhance future activities across the Thames Estuary. But, in doing so, our overriding goal has been to draw lessons that could have wider relevance and application for other regions and local skills systems. In outlining future considerations, we have therefore also drawn on wider international good practice on what are key priorities for “future-proofed” systems.¹³⁸

5.2 A quick recap of our approach

This research has sought to advance our understanding of the practical realities, opportunities and challenges of enhancing future growth within regional creative clusters through investment in skills. Previous PEC research has highlighted some significant skills challenges to overcome to ensure the creative economy in future has the most highly skilled workforce. This is not least in terms of tackling deep rooted creative skills deficiencies, as well as responding to new emerging, future employment and skills requirements. This research has sought to understand the most pressing creative skills issues locally and what local partnerships, especially involving specialist skills institutions and experts, are doing alongside industry, to develop effective creative education and skills solutions.

Place-based strategies provide an opportunity to add value to mainstream skills and employment provision, through the closer customisation of programmes, which aim to better meet the needs of the local economy, and hence local employers. As such they have been increasingly supported by Government as part of broad policy reforms to improve the working of the skills system. Crucially, place-based approaches can advance opportunities for success by strengthening the operation of institutional networks, serving creative industry needs, where businesses, providers, suppliers and specialists within the local infrastructure work more closely to secure improvements and share best practice through knowledge exchange and collaboration. The intention of the research therefore was to draw insights and learning from what local partners, in one chosen area as a case study, have practically tried around skills activities, and to offer lessons more

widely. The Thames Estuary was selected because it had been backed by Government as having potential, following the Thames Estuary Growth Commission, and it had identified the Creative Industries as a sector priority with the development of the TEPC Vision. Furthermore, the launch of the Industrial Strategy in 2017, provided further targeted sector funding to the region, through the CDF, to amplify place-based, cultural-led regeneration and inclusive growth.

Of course, the Covid-19 pandemic brought a new and distinct wave of disruption to the study, with many parts of the Creative Industries and the skills system, substantially affected by public health measures, seeing several phases of economic lockdowns, and wider social distancing which has hit engagement the Creative Industries hard, as well as education. But, given that many of the skills challenges had existed before the crisis, and the skills and talents of the workforce are so key to recovery, this arguably made the focus of the study even more urgent. In other words, it has been useful to explore what actions are growing in importance to strengthen the effectiveness of the local skills institutional infrastructure and system, and hence, to support a more confident future recovery of regional creative clusters through creative skills.

The research has been conducted in three phases. It first sought to explore the key priorities and distinct features of the TEPC Vision, and the position of skills interventions within it, alongside a wider package of support. It then has aimed to understand the strengths and the distinctiveness of the skills offer itself within the Estuary for the Creative Industries. Finally, it reviewed how the local skills system has had to evolve, both to external drivers, such as Covid-19, and more generally to ongoing policy developments, to retain its currency and relevance and to enhance the effectiveness of skills investments locally.

5.3 What are the key features of the TEPC approach?

The Vision was launched in 2017 as a major partnership project across the Thames Estuary to build on current core creative assets in the area, and unlock long term, transformational, culture-led improvements across East London, North Kent, and South Essex. Whilst initiated by the Mayor of London and the LEAP, the SELEP and the SECEN, it has grown into a quite substantial partnership project, involving 18 local authorities, various industry and cultural bodies and intermediaries, as well as individual creative businesses and providers.

The TEPC Vision has involved an ambitious programme of locally run projects and investments, centred around an existing network of creative production hubs or clusters across the Estuary to create a *stronger creative and cultural identity* for the region. Of course, the Vision has been about a

¹³⁸ See for example the [work of the OECD](#)

much wider range of actions than skills and education alone.

Indeed, it has aimed to *develop a more supportive cultural and creative infrastructure* across the Estuary, and hence a cross-cutting *package of investments and support*, to drive cultural-led improvements and regeneration locally and a high performing creative sector. This has included better co-ordinating multiple activities and services regionally and sub-regionally around: accessing investments; research and development and innovation; technological adoption; as well as leadership supporting skills and business development, to name a few. The Vision seeks, therefore, not only to enhance local skills opportunities, but to: raise the profile and attractiveness of the area to new talent and investment; and to make a significant contribution to a more sustainable and equitable growth, bringing wider economic, employment, social and cultural benefits to the region. As such, the TEPC project has been concerned as much with the role of a stronger creative economy in driving social innovation, enriching the community, and creating more opportunities for people of all backgrounds to progress. In the current climate, these goals have become even more important, with the publication of the Plan for Growth, and its focus on *Levelling Up* as well as *"building the economy back better"*.

The PEC researchers worked with local stakeholders to explore, and make more explicit, the key design *factors* and *working principles* behind the TEPC Strategy. It was important to understand what they thought was *already adding value and making a difference locally*, as well as being key to the project's future success in the long term in the region.

What factors in the TEPC project offer wider insights for success elsewhere?

As the TEPC has identified the Estuary as a significant strategic location for the Creative Industries, backed by Government, stakeholders felt this placed an emphasis on the importance of *place-making* and developing a clear and *compelling vision* to illustrate this and bring to life the *power of a place-based approach*. Reference was made to the scale of the ambition, and its importance in driving innovation and more radical, new thinking, as well as a basis to stimulate investment. Key to this was setting *long-term objectives locally and an inspiring goal*, which allowed time for experimentation and new practices to mature, embed and have an impact. Indeed, the original Vision set out a 30-year horizon and the broader TEGB strategy has a line of sight up to 2050.

"It's a hugely ambitious project, seeking to transform the Estuary to be the best production hub in the world"

Yet, this was seen as a significant challenge as well as an opportunity too. That is, it raised questions as to how to retain focus over time, and ensure continuity in actions, especially given the short-term nature of policy cycles and changes of Government seen in the UK. This undoubtedly risked cycles of changing and competing priorities.

A strong starting position for the TEPC Strategy was said to be that it was *asset-based* and thus, "real". This centred around existing local creative capabilities and strengths in the local institutional infrastructure, with key anchor institutions, including high-growth firms, and expert creative agencies, which provided the basis to leverage value. Such an approach also reflected local attempts to learn from leading international practice which has suggested that the *most successful cluster growth is emergent rather than created*.

Of course, in the context of the study, skills institutions, universities and colleges were also thought to be key. Having foundations locally, was seen as vital to create a strong, *distinct and identifiable global TEPC brand* for the region on which to build in future, that partners could recognise, and back. *A clear cultural and creative identity was felt to be an important galvanising force for attracting future investment, business, and talent* and hence driving growth – thus providing the basis for a long-term investment plan including private as well as public investment. Crucially, for example, it gave local trade and investment agencies something concrete to work with.

Varying perspectives were provided around what this identity was about. For some they spoke in broad terms about the structure of the creative economy as a whole across the region and referenced the potential of growing the current network of creative hubs within the Estuary into an internationally-recognised, creative *super-cluster*. This covered a diverse range of Creative Industries rather than specialising in single sub-sectors. Some of this thinking had been informed by initial research for the TEPC proposal, which drew on international good practice about the growth dynamics of global regional clusters. In addition, others emphasised specific world leading sub-sectors that they felt were crucial to the future success of the TEPC. These were wide ranging and included the Screen Industries, Film and tv, the Performing and visual arts, the Digital and IT sector, Design and in particular the Fashion Industry; and broader Crafts. Further, those who referenced specific sub-sectors often also talked about specific creative clusters and production sites, in particular parts of the Estuary. Those identified most often were the larger more mature clusters in Purfleet and Stratford. But others mentioned with a strong sector identity included: Dagenham and Ashford with their connections to the Screen Industries and Film and tv; Poplar for

Clothing design and Fashion; and some of the coastal towns such as Southend-on-Sea, Margate and Folkestone largely for arts, crafts and cultural activities - with for example Metal at Southend-on-Sea, the Creative Folkestone Quarter and the Turner Contemporary at Margate.

Furthermore, for many, the opportunity offered by the location was key to the identity: given its proximity to already high performing areas in London and the South-East; its rich culture, history and economic heritage; its strong institutional infrastructure, serving the creative economy, particularly in skills, with the National College for example; and the availability of land and affordable homes and workspace. In particular, the advantages of the region were felt to provide conditions that *favoured performance-enhancing features of the sector* – that is the sector was seen as: highly innovative and pioneering, dynamic, export-orientated, and highly entrepreneurial, given the high degree of micro-businesses and freelancers.

Leadership and *governance* were also seen as vital, not only through the Board and working groups attached to the TEPC itself, but through the linkages to wider Boards and Governance Groups in different parts of the Region such as the GLA, the LEP, the TEGB, wider local authorities and key local institutions including the universities and colleges. In addition, national links to central Government were also highlighted. On the one hand, this stressed the importance of strategic oversight and governance to monitor, co-ordinate and oversee delivery directly of the TEPC Vision and associated projects within the Action Plan. Relatedly, there were key functions to oversee such as the development of evaluation and management information tools to monitor progress and capture learning. For instance, frequent reference was made to the dedicated evaluation attached to Creative Estuary, and its peer network.

But, on the other hand, it was also about horizon scanning, optimising opportunities ahead and anticipating, mitigating, and responding to, any evolving threats – the Covid-19 crisis had clearly been one significant example of that. In this regard, a key role was influencing wider leaders and decision makers. Many stakeholders raised the significance of the TEPC Board working to extend the breadth and reach of its influencers, operating through a network of advocates, ambassadors and champions for the Estuary to grow its identity, promote the work it is doing and help identify and secure future investment opportunities. For example, reference was made to the helpful role of linking to the TEGB, and its newly appointed members in the

last year. These networks were already being instrumental in strengthening activities and the local ecosystem across different parts of the Estuaries portfolio. One area cited related to enhancing links with industry such as through the various industry-led advisory bodies. These “influencers” were highlighted as the additional *“glue that knits key parts of the TEPC project together”* at a strategic level.

Relatedly, a further essential component was seen to be the importance of *partnerships* and the *institutional infrastructure*. That is, the success of the TEPC project to draw upon and combine the efforts, resources and expertise of the wider TEPC consortium and interest groups to drive stronger Estuary-wide action. Whilst it was recognised that distinct projects of individual partners would be important, the *power of place-making*, across the Estuary, was seen to depend on individual partners uniting behind common goals to aggregate resources and, in turn, effects to deliver a greater sum of parts. This, therefore, emphasised the importance of collaboration with different partners working together at multiple levels, to access resources, skills, training, innovation, research and technical support. This aligned with wider evidence pointing to the potential benefits of agglomeration and co-location to cluster growth, where partners and institutions in the local infrastructure reach a critical mass to bring significant advantages from working together. At the same time, with greater clarity in partnerships sub-nationally – improving local to local working - there is a need to work through and develop local to national partnerships and to optimise the alignment of local with national priorities.

Stakeholders referenced the “hard work” that had gone into building stronger partnerships and the progress that had been made in securing greater collaboration rather than competition. There was an expressed desire within the Thames Estuary to *protect as well as strengthen the capacity and capability* of the local ecosystem for innovation, knowledge exchange and talent and business development in a way that would be sustainable. In such a context, concern was expressed about the Government's review of the LEPs and local infrastructure in the 2021 budget¹³⁹. Whilst there was recognition of the importance of ensuring strong representation amongst partners and members involved in governance, it was hoped that this review did not inspire widespread restructuring to further displace valuable resources at what was already considered to be a challenging time.

In turn, the TEPC Action Plan was thought to have provided the basis to develop a *cross-cutting, multi-*

¹³⁹ [New levelling up and community investments - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

tiered framework, to help create a more supportive pan-Estuary creative infrastructure and *package of locally customised support services*. Stakeholders highlighted the value of seeking to bring together, and better co-ordinate, multiple funding and policy tools, to ensure they were sufficiently operating through a “pro-creative” lens - in principle even if hard to deliver in practice. This was seen as vital to unlocking the fully potential of more tailored services locally. This covered areas such as planning, innovation, business development and enterprise, and most crucially for this study, skills. Tangible examples were identified that were already making a difference.

For instance, new projects initiated by partners, operating within the TEPC structure, such as those attached to Creative Estuary, as a CDF project, were thought already to be distinctly adding value by: forging multi-agency and more integrated working; and bringing wider projects initiated at an institutional level together, so that they were also visible under the TEPC umbrella - that is whether established by a local authority for example or education provider. Indeed, the Estuary, annual arts festival, as part of Creative Estuary, was thought to have made a significant contribution in bringing together creative practitioners and artists across the region. The Re:Generation 31 project was also said to be connecting skills providers, with new networks of local employers, as well as linking skills programmes with wider Government employment initiatives such as Kickstart.

New funding streams coming on-line were providing a further basis to fill gaps in support services, make connections and/or accelerate impacts for the creative economy. For example, the Covid-19 recovery funds had been used to enhance local business support services and skills programmes, with the development of the Sector Academies for the Creative Industries in London, being one example. Having generally reflected locally with stakeholders about core aspects of the TEPC project and its structure, we looked more closely at the picture with regard to skills and the operation of the skills system.

5.4 Understanding the local skills system

The research examined the post-16 education and skills system within the Estuary in more depth to *understand the distinctiveness of the skills offer and key specialist areas*, contributing to the TEPC and hence needs of the Creative Industries locally.

Key strengths in the local skills infrastructure

Initial research underpinning the original TEPC Vision concluded¹⁴⁰ that there is a **recognised baseline**

infrastructure in post-16 creative education, operating across the region. This is seen to provide vital steps through further and higher education pathways and into work. The current study has sought to explore this position further.

Whilst there was not a dedicated pan-Estuary skills strategy for the creative economy at the time of the study, according to stakeholders the TEPC project was seeking to stimulate and co-ordinate Estuary-wide skills activities for the Creative Industries, building on the foundations of the separate skills strategies locally. The intention was to create a more *integrated and responsive, employer-led creative education and skills infrastructure* for the region in future – operating across schools, colleges, and universities through industry recognised and respected further and higher education and “into-work-based” pathways. Importantly, this has started to bring common multiple objectives together to support better integration across the local skills system. At a strategic level this has been to:

- **enhance entry opportunities for young people** and the future talent pipeline;
- **support lifelong learning and progression routes for adults**; and
- **encourage in-work transitions** into the sector, widening access and the diversity of the future creative workforce.

It is clear that over time *a mature and experienced local skills ecosystem* has developed across the Estuary to deliver a range of specialist creative courses and this is supported by local skills institutions. This involves a wide network of around 120 post-16 schools, 50 further education colleges, 13 universities and a number of ITPs – 20 in London and 8 in the South-East specialise in creative subjects. In addition, there are wider skills development agencies for creative sub-sectors in the region such as Screen South, with a wealth of experience in developing customised creative skills initiatives.

The local institutions have **established a creative offer which largely supports one of two pathways: traditional academic routes** via A'Levels to university, *as well as technical routes* on to further study - albeit in terms of more traditional Applied General Courses rather than Apprenticeships in the case of technical pathways. This is evident in the qualifications of an increasingly highly skilled and qualified creative workforce, with just under three quarters of creative workers holding degrees or postgraduate degrees on average overall.

In addition, the local ecosystem is enhanced further through a **network of specialist creative centres of excellence**, which have achieved recognised

¹⁴⁰ Thames Estuary Production Corridor: Case for Investment. Hatch Regeneris, We Made That, & Tom Fleming Creative Consultancy

status. For instance, *some providers' courses had achieved industry accreditation* such as in the screen industries. In addition, the *local institutional infrastructure also included publicly funded (and Government backed) specialist providers*, serving the needs of the creative sector. This involved University Technical Colleges, National Colleges for the Creative Industries and the Digital sector, the National Skills Academy for the Creative Industries; and IoTs, for instance. More recently, in the context of some of the technical education reforms this has also seen an update to the Government registered providers, which had resulted in more providers being able to deliver technical education across the region, capturing Apprenticeships and T'Levels in creative areas.

Furthermore, there are also some important *internationally renowned creative institutions* that are closely connected to the local skills infrastructure and have earned a global reputation for creative higher education. These include: the Courtauld Institute of Art; The University for the Creative Arts; Guildhall School of Music and Drama; Norwich University of the Arts; RADA; The Royal Central School of Speech and Drama; Royal College of Art; Royal College of Music; London Academy of Music and Dramatic Art; Ravensbourne; Trinity Laban Conservatoire of Music and Dance; the UAL. Whilst they are not all located in the region, their close proximity to the area, is highly valued.

Crucially, this specialist local skills network has depended on developing and nurturing some important and distinct sectoral partnerships locally, nationally, and internationally to draw upon vital technical expertise to shape and update skills programmes over time. This has included *wider partners such as awarding bodies* such as UAL, BTEC, OCR and City and Guilds in the region, as well as businesses themselves. Further, providers referenced the importance of a range of *industry-led forums* and panels across the region, accessed on the back of local business networks and communities. Indeed, many providers in the Estuary had their own *dedicated employer engagement teams*. These were crucial to enhancing employer engagement locally and accessing important industry insights and intelligence as a basis understand ongoing changes and trends in the sector. Interestingly too, providers were recognising the need to work through broader communities to scale up their activities and extend the breadth and reach of what they were doing, especially in creative sub-sectors with high numbers of micro-businesses and freelancers. *Some new delivery models were being trialled in the region including working with industry and membership bodies as well as through ATAs who can recruit, employ and arrange training for apprentices on behalf of employers.*

Furthermore, given the widening sector expertise, this has also enabled some **additional sector-specific, and more customised programmes to be developed**. Indeed, opportunities had been unlocked through dedicated sector funding from DCMS for example through the initiatives such as Digital Skills Partnerships and Creative Estuary. This had supported local skills innovations such as Re:Generation 31, which aims to develop creative skills for young people in smaller creative businesses, alongside the Apprenticeship programme, by customising job placements to local employer communities' and their business needs.

Together this skills infrastructure has clearly already evolved to serve the Creative Industry needs within the Estuary. While it was acknowledged that not all of the local workforce will be trained locally, this has provided some important local skills expertise to support the creative economy within the Estuary and beyond, and there was a desire to protect and preserve this local knowledge moving forward. That said it was also recognised that one of the *biggest current and future issues moving forward was ensuring skills provision remains relevant over time* in response to ongoing changes in the labour market and skills policy. As such the research has also needed to consider and anticipate threats, the future priorities they raise and strategies to continually resolve them.

Delivery challenges to overcome

Although the review has identified some important strengths within the Thames Estuary skills system, that have been further amplified in the context of change, the research also illustrated wider challenges faced in the region. These effectively bring to life the sorts of issues local areas go through given the turbulent labour market and skills policy environment they must embrace.

So, while various local partners and in particular skills providers we spoke to supported steps to repurpose and reinvigorate the skills system to ensure it was future-proofed, and highlighted many positive developments in recent policy announcements, there were also significant underlying problems still to address. Indeed, it was clear that left unresolved, these were likely to present ongoing obstacles getting in the way of ensuring effective delivery and future success in meeting local objectives.

For instance, there were various *nationally imposed and constructed "system process issues and bureaucracies"* inhibiting local innovation and customisation and in turn institutional responsiveness. This was evident in rigid funding and governance frameworks for skills institutions, frequent central policy churn, which risked misalignment between national and local priorities and inflexible centrally driven programme

implementation, limiting local and sectoral variations.

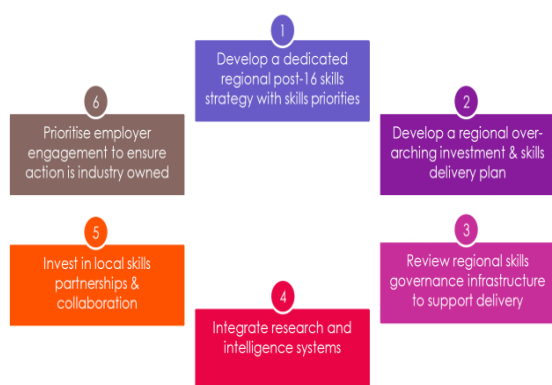
Such effects risked therefore limiting individual and employment engagement in the skills system and worsening skills deficiencies in future locally. It is therefore vital that local partners within the TEPC, work through these different issues with partners including central Government moving forward. This is vital, if the region is to enhance the skills offer for Creative Industries within the Estuary and the effectiveness of the local skills system. Given that these issues are unlikely to be distinct just to this region, there will clearly be benefits in linking up with regional and national partners with an interest in the creative economy. We set out possible next steps below.

5.6 Priorities for the way ahead

A key out-standing question for local partners, looking ahead, is how best to act in future, nationally as well as locally, to enhance the skills offer for the TEPC? This is especially in the light of ongoing skill challenges, and in the context of continuing change in a post Covid-19 recovery, both regarding external economic and labour market developments as well as in policy.

We have explored through the research possible ways to enhance future activities across the Thames Estuary as part of the TEPC project moving forward. But, in doing so, our goal is also to draw lessons that could have wider relevance and application for other regions and local skills systems.

Figure 15: priority areas for action



Drawing on lessons learned by stakeholders working within the Estuary, and connected to the TEPC project, and wider international good practice on “future-proofed” systems, we have outlined a number of areas to consider:

A single post-16 skills strategy for the region

It is recommended that a dedicated post-16 skills strategy and action plan is developed for the TEPC to oversee and better co-ordinate skills activities and funding, supporting the creative economy

within the Estuary over the long term. A specific post-Covid-19 skills vision for the TEPC can *articulate distinct local education, skills and training priorities, and provide further clarity about how they will be met*. There are a number of benefits in taking such action. Taken together these could provide a strong steer on the sorts of practical actions that might be taken locally to respond to the Skills White paper – Skills for Jobs – and its requirements to develop and implement local skills improvement plans. It can also provide a chance to respond to CSR skills priorities.

Firstly, a new over-arching strategy provides the basis in a post Covid-19 context, to *revisit and refresh the skills objectives and ambition for the Estuary* – that is clarifying what are the *over-arching, shared goals in future*, as the region recovers? This will provide a basis to explore how the pandemic has disrupted and changed the local economy, and to assess how long-lasting any effects are – particularly for the Creative Industries. Covid-19 has clearly had a significant shock locally, but it has also brought opportunities, inspired by much innovation, and this has applied, especially to the creative economy, with new business applications stimulated by createch for instance.

There are currently varying interpretations amongst stakeholders about *what the TEPC identify uniquely stands for*, and this might present a chance to reinvigorate, and, in so doing, to clarify the *specific priorities this raises for skills and, in turn, the specialist institutions and skills programmes locally*. In other words: what are the creative sub-sectors and specialisms currently important across the Estuary and how have they changed?; in what creative hubs and networks are these located?; how are these expected to change moving forward?; and what current and future employment and skills requirements does this raise for the local skills system?

It can also enable *better connection between different parts of the skills system*, supporting effective delivery, and ensuring *continuity in delivery*, from schools through to adult skills training, upskilling and reskilling. As such, it is possible to also consider how to *balance multiple and potentially competing priorities*, and the different types of skills provision. It would also be vital to work through the tensions between national and local priorities and programmes and how to resolve conflicts. This, therefore, would need to directly embrace the regions strategic objectives, including not only: improving the skills and entry opportunities of young people; but how to raise the skill level of adults, sufficiently reaching disadvantaged communities and/or hard to reach employers, especially freelancers and micro-businesses; and how to support wider in-work transitions of adults moving from declining areas. The *over-arching strategy can link to individual institutions skills plans to be clear*

how different local institutions are contributing to the whole, raising participation levels and funding commitments.

"We have very distinct skills missions and priorities and need the space to deliver them"

It can also more usefully *facilitate better integration between skills and wider policy areas* in the broader TEPC framework, aligning investment more effectively between policies around business enterprise, innovation, employment and skills. A key goal here is, thus, to avoid the risk of *"silo-working"*. For example, current employment and business enterprise initiatives funded through the Covid-19 recovery fund are supporting back to work services and training, through short-term initiatives such as Kickstart and Sector Work Academies. But, if connected to broader education programmes such as Apprenticeships, they could facilitate wider career transitions and long term development and progression to further study, and through career pathways, with additional long-term employment benefits.

Research more widely points to some of the key ingredients in ensuring the effective development and delivery of such a strategy – these include considering issues of: *scale; longevity and policy co-ordination*¹⁴¹. That is:

- ensuring local partners have the space and resources to meet the scale of ambition and priorities *with an appropriate level and blend of skills activities and customised programmes, sufficiently targeted and funded* - in this case, of course, to meet the needs of the creative industries.
- Working to ensure *core activities are protected locally and can run over the long-term*, and, hence, be funded for enough time to have an impact.
- In addition, as the range of creative skills programmes and courses that are supporting the needs of the creative economy are not the exclusive domain of any single partner or indeed the entire focus of their work, there *needs to be sufficient co-ordination across different parts of the skills system. This can work to optimise the creative skills outcomes* achieved over time. The co-ordination will be more effective if all the *key relevant local skills institutions are identified* and there are shared goals and hence regional commitments.

The development of linked collaborative networks across the Estuary provides a good starting point for developing and agreeing this strategy.

An over-arching investment & skills delivery plan

¹⁴¹ See for example [the Industrial Strategy Council \(2021\) Annual Report](#).

Once a focused strategy is in place, it's important to ensure this is supported by *a clearly specified delivery or route map. This should cover how to meet distinct outcomes across the region*. Whilst there is, arguably, clarity in the TEPC community about the strategic objectives locally, and shared goals, these priorities are shaped by individual strategies and plans of different partners amongst the GLA, LEPs, local authorities and individual providers for example. Any problems encountered in delivery then risk being contained at a very local institutional level and arguably may prove harder to resolve. In turn, this may inhibit what can in practice be delivered in sufficient scale to meet local strategic skills objectives, and, hence, threatens the level of impact. *A regional-wide delivery plan can be a practical means to recognise the goals and objectives of varying individual institutional plans but to amplify and accelerate impacts through the more effective integration of activities and partnerships across funding sources where there are shared goals.*

As we saw earlier, there is considerable complexity across the skills system, with different programmes and courses for different age groups in different parts of the education pathway being funded in different ways and for varying lengths of time. Some programmes are funded through annual institutional grants, and some are funded through short term funds nationally and/or locally - for example, the current National Skills Fund is a 5 year fund. Individual institutions will have different *programme lines* for different types of delivery. In turn varying skills institutions are restricted in what they can do individually by limits in their governance and funding arrangements.

..."Money always comes with some kind of bells and whistles, which limits how it can be used in reality. But is this always necessary? What further flexibilities can be provided?..."

Current skills system reforms, in the short term at least, do not appear to be resolving such complexity quickly. As such, an over-arching plan for the region including for skills investment, and a clearer strategic position could add considerable clarity and value about where and how to target local skills action to ensure sufficient preparations are put in place for the long-term, and appropriately funded. This can seek to integrate planning across policy areas and hence multiple funding sources, including central Government (eg ideally uniting thinking and action between DfE, BEIS and DWP as far as funding rules allow).

Figure 16: Drafting TEPC Skills Delivery Plan

Objective	Type of intervention	Delivery partners	Resourcing	Funder	Milestones	Links to wider initiatives
Early learning						
In-work transitions						
Lifelong learning for adults						

A more co-ordinated delivery plan and route map for the region can help retain continuity in local planning and action. It provides the basis to think ahead, and to be more systematic about where existing initiatives are working, identify gaps and to target activities to really add value and avoid duplication.

Consequently too, it provides a strong basis to counter unfavourable policy decisions, which are likely to impede local delivery objectives, with local partners working together to make their case. One such example includes recent proposed cuts to skills programmes, which have a strong local industry recognition and value, combined with the Government selection of “in-demand” courses which deprioritise creative subjects. Here, the GLA has taken steps to challenge the Government’s list of what should be a priority and seeks to protect funding in creative areas within the region.

In shaping future proposals to resolve persistent skills challenges and meet long-term strategic goals, there is room to deploy a more scenario based, “future-back approach” as a means to enable new, more ambitious, aspirational thinking. The future-back approach enables attention to be focussed on new ways of doing things. In the current climate this recognises the increasing dynamism of a futures economy, and growing cycles of economic shocks and disruption, and accepts new solutions may be needed in response. The approach therefore provides an opportunity to consider experimenting, to think and act differently and more innovatively and to create the conditions for incremental improvements, learning and capacity building.

Ongoing policy developments outlined in the Plan for Growth reference a number of future funding opportunities in cross-cutting policy areas such as skills (eg National Skills Fund and Strategic Development Fund) as well as for regions (including the Community Renewal Fund, UK Shared Prosperity Fund, and Levelling up funds) and sector specific funds (such as through the revised creative sector vision and deal). This has *the potential to support plans for ongoing experimentation, and piloting locally to grow local capacity, capability, and policy continuity, as well as building on the progress and good practice of existing successful schemes* such as the DSPs and Creative Estuary. In the context of Government evolving sector visions for priority

sectors in the Plan for Growth in the next 12 months, and refreshing the Sector Deal for the Creative Industries, these will be important policy developments for different regions such as the Thames Estuary to influence. It also starts to set out a strategic agenda around where to work with Government and to enhance place-based activities.

Refresh regional skills governance

Any changes in an Estuary-wide skills strategy would, ideally need to be supported by *an appropriate governance system*, serving such skills needs. This helps to ensure proportionate and clear lines of responsibility between different existing governance groups at different levels and parts of the Estuary - so the governance system may in the development of the strategy also require review. Any governance refresh will need to ensure *the right skills stakeholders* are involved and their roles and accountabilities are clear. It will also need to consider how to align and co-ordinate financial arrangements. In short, where collective activities are identified, appropriate accountability mechanisms need to be in place to guarantee resources are allocated effectively, in a way that ensures that those with responsibilities have sufficient funding and capacity to delivery to the required standards and cost-effectively. In addition, it is important to put in place effective management information and evaluation mechanisms to monitor progress and delivery of outcomes.

“If you can’t measure it, it doesn’t count.”

Some of the TEPC programmes, such as Creative Estuary, have their own dedicated evaluations integrated into the programme. For other initiatives evaluations are led nationally by Government (such as in relation to the National Colleges, UTCs and IoTs). But, it would be also beneficial to track wider developments to ensure there is sufficient information more holistically across the TEPC project. For example, with the use of performance dashboards and measurement frameworks, capturing outcome and impact measures as well as tracking activities through input and output measures.

Box 17: Developing a performance scorecard

Objectives	Activities	Programme resources & inputs	Programme goals (outputs/outcomes)	Local/regional goals (outcomes/impacts)	National goals (outcomes/impacts)
Early learning	<ul style="list-style-type: none"> Design & pilot flexible apprenticeship programme in selected production sites 	<ul style="list-style-type: none"> Investment secured from strategic bodies and Government Increase partnership working in the Estuary Investment in creative, cultural and supporting infrastructure 	<ul style="list-style-type: none"> Numbers of young people enrolling as apprentices Number of young people securing apprenticeship gigs Number of young people from more diverse backgrounds 	<ul style="list-style-type: none"> Number of creative and cultural jobs and businesses supporting young apprentices within local clusters Number of Estuary young residents employed in creative and cultural jobs in the Estuary 	<ul style="list-style-type: none"> Reduction in skills shortages in creative priority sectors Improvement in economic output in creative priority sectors
In-work transitions					
Lifelong learning for adults					

Integrate research and intelligence systems

By revisiting the skills strategy, there is an opportunity to take stock of current local LMI sources and how they are updated. One key factor to consider is whether current research and intelligence sufficiently captures the future and *understands the implications of future drivers of change and megatrends*, such as technological and wider innovations, for creative sub-sectors in the region and their skills and employment developments. As such, the development of the strategy can inform new research, "getting under the skin" of creative careers of the future and what this means for future learning and skills provision.

It may be beneficial to align and *integrate intelligence and information systems*, across the Estuary, filling gaps in knowledge. Stakeholders within different parts of the Estuary generally valued the skills information hubs currently created and managed by the LEPs. But providers in particular were calling for more regular, granular and future focused intelligence on the creative economy that better captured detailed sub-sector employment and skills requirements to help them more effectively anticipate and adapt skills provision to meet future career developments and changes. There was a call for this information to be better co-ordinated with Government funded LMI sources, currently used by the Skills Advisory Panel¹⁴². Furthermore, others wanted the data to be enhanced to capture all parts of the Creative Industries – so for example to ensure consistent definitions were used and that information adhered to the DCMS definitions of the sub-sectors as far as possible to facilitate alignment between national and local policies. As such, the intelligence system could perhaps better follow the principle of *"collect information once and use many times."*

The perceived pace of change in the sector combined with its importance in the National economic strategy – Plan for Growth - was felt to present a special case for more Government funding for research within the Creative Industries to enhance official statistics and hence increase understanding of developments within the sector in different local areas. This was thought to be especially key within selected regions, such as the Thames Estuary, where the sector was a known local priority and there were established regional creative clusters. It therefore raised an important commissioning and oversight role for the new Skills and Productivity Board.

Invest in regional skills partnerships

Throughout the research the importance of collaboration and partnership working has been emphasised, and this calls for strong partnership agreements. This will help to develop and clarify the

multiple levels of "local-local" collaborative working. The strength of the skills system is that the local infrastructure supports skills institutions that specialise in different creative areas, offering diverse expertise and capability. At times, individual institutions will be operating individually on distinct projects. But, the power and effectiveness of the TEPC Project, and in turn a local skills system more generally, if it is to effectively meet the needs of the creative economy overall, is that it can bring together those partners to collaborate over common shared issues and goals. This will be key to ensure the system can be more co-ordinated, support progression and in turn can scale up the activities and benefits. This means at times there may be the need to pool resources, co-create and work in together. At other times it may call for distinct specialisation in areas where there are unique local gaps in provision that need to be filled. In addition, as greater clarity is achieved in partnerships sub-nationally – improving local-local collaboration - there is a need to work through and develop local-national partnerships too and to optimise the alignment of local with national priorities. As such, local areas need *to review their partnership arrangements and agreements to ensure roles and responsibilities on core Estuary projects are clearly defined.*

Prioritise employer engagement

Nowhere is the importance of partnership more evident than in relation to employer engagement. It is vital to review, and refresh working arrangements with industry, strategically and through local businesses networks, to improve the basis for stronger collaboration. Industry clearly has a vital role to play in the effectiveness of any local skills system shaping content and securing engagement. The TEPC has seen some significant challenges engaging businesses within the system. This is in no small part, as we have seen earlier, due to the fragmented and piecemeal nature of the institutional infrastructure, serving business needs and industry - not helped by cuts in Government funding. It is also complicated by the structure of the Creative Industries and the large number of small businesses. That said, there are some local attempts to enhance engagement. Due to the complexity this will not be feasible to resolve through any single solution, but, it will need a strategic approach, which extends beyond the individual actions of single providers working alone.

The development of provider networks across the Estuary, and the linking between different groups that has been developing over time, provides a useful basis to facilitate networking and stronger partnership working in future, especially with employers. Indeed, Creative Estuary has already helped to facilitate broader connections across the

¹⁴² [Skills Advisory Panels: Data sources \(publishing.service.gov.uk\)](#)

skills system. Once a dedicated skills strategy is in place, it may be beneficial to review and adjust these working arrangements accordingly, and in particular, to reflect on where and how improvements might be made in collaborative working.

This could encompass a range of activities. It might include for example *mapping employer networks locally and identifying stronger networks and options to improve in future*. Providers currently mentioned a range of options; sometimes through formal industry-led advisory boards across the Estuary; others involved large, anchor institutions; sometimes through supply chains; sometimes with business networks supported in sub-regions of the Estuary; and further examples were developing with intermediaries such as industry and professional membership bodies and ATAs. But mapping active networks should provide a basis *to take a more strategic approach to working with employers in the region in future and better co-ordinate future engagement practices*. For instance, where specialist providers such as the National College for Creative Industries have developed new skills initiatives, during Covid-19, deploying different models of blended delivery, there are likely to be advantages in sharing the curriculum and programme details more widely amongst providers in the region to enhance the overall relevance of the local skills offer and reduce wider development and delivery costs.

The Skills White paper and dedicated skills funds (such as the Skills Accelerator Fund, Strategic Development Fund and National Skills Fund) provide a vital opportunity to review and improve actions here, offering funding to local partners to work together to co-create and test new engagement and skills delivery models. Furthermore, wider regional funds such as the Community Renewal Fund and forthcoming UK Shared Prosperity Fund offer further opportunities for experimentation and testing new partnerships over the long-term, combined with future sector specific funds. Indeed, any revised and updated creative sector vision could enable any effective models and programmes piloted in the short-term to be scaled up and made more sustainable in the future. This therefore provides fertile ground for peer-to-peer networking and sharing best practice through knowledge exchange. These can be regionally distinct or expand national initiatives such as the proposed *college business networks*.

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