

**London Borough of Southwark  
Camberwell and Peckham  
Creative Enterprise Zone**

**July 2018**

**CEZ Area Research Report**

## Contents

### Research Framework

1.0	Introduction	3
1.2	Creative Enterprise Zone: Definitions	5
1.3	Geographical Delineation	8
1.4	Methodology	9

### Mapping & Findings

2.0	Definitions	9
<b>2.1</b>	<b>Creative Activity</b>	<b>11</b>
2.1.1	Existing Creative Activity	11
2.1.2	Businesses & Labour Data	12
2.1.3	Statistical vs. Direct Data	13
<b>2.2</b>	<b>Space</b>	<b>16</b>
2.2.1	Forms	16
2.2.2	Similarity of Spaces	17
2.2.3	Proximity of Enterprises	19
2.2.4	Ordinary Streets	19
2.2.5	Open Workspaces	20
2.2.6	Lack of Space for Growth	22
2.2.7	Rent Level Spread & Tenure	23
2.2.8	Spatial Threats	24
2.2.9	The Railway Arch Challenge	25
2.2.10	The Meanwhile Site Pipeline	26
2.2.11	Medium-Term Opportunities	27
2.2.12	Long-Term Opportunities	28
<b>2.3</b>	<b>Demographics &amp; Skills</b>	<b>29</b>
2.3.1	Demographics in the Area	29
2.3.2	Deprivation in the Area	30
2.3.3	Deprivation & Creative Activity	32
<b>2.4</b>	<b>Crucial Context for Creative Enterprises</b>	<b>32</b>
2.4.1	Broadband Coverage	33
2.4.2	Infrastructure	33
2.4.3	Licensing & Activity	34

2.4.4	Business Rates (Relief)	35
2.4.5	Last Mile Logistics	36
2.4.6	Business Skills	37
2.4.7	Local Supply Chains	38
2.4.8	Measuring Activity	39
2.4.9	Lack of a Network & Shared Resources	40
	<b>Bibliography</b>	<b>41</b>

## Research Framework

### 1.0 Introduction

This research report has been produced as part of the application by the London Borough of Southwark to the GLA to formulate the framework for a Creative Enterprise Zone (CEZ) between Camberwell and Peckham.

The findings of this research have informed a corresponding Action Plan and Evaluation Framework complementing the application.

Camberwell and Peckham are both home to abundant creative enterprise and activity; from the Bussey Cricket Bat Factory innovations in Peckham during the early 1900s, and progressive health programmes emerging from the Peckham Experiment, during the 1930s, to Bold Tendencies' conversion of a public car park into a cultural centre, and hidden traditional tailors behind town centre shop fronts. This area has always been fertile ground for creative productivity and output.

The recent growth of the creative industries, at a national level and particularly in London, is reflected in the accelerated growth of creative enterprise in the Camberwell and Peckham area.

The proposed CEZ in Camberwell and Peckham is defined by two major factors: firstly, the existence of an organically grown, diverse and complex presence of creative enterprise, and secondly, the benefits and pressures of its location within an inner urban area (London, Zone 2).

The successful establishment, and continuous development, of a Creative Enterprise Zone here will yield valuable insights and proven tools for application in areas elsewhere in the borough, across London, and internationally.

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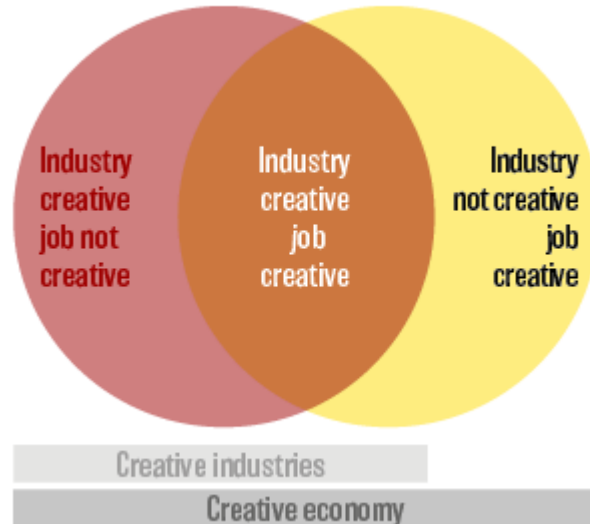
Creative Enterprise Zones: Draft Outcomes Framework (BOP Consulting, May 2018) // Creative Enterprise Zones: Prospectus 2017 (GLA, December 2017) <[https://www.london.gov.uk/sites/default/files/creative-enterprise-zones\\_prospectus-2017.pdf](https://www.london.gov.uk/sites/default/files/creative-enterprise-zones_prospectus-2017.pdf)> [accessed 30 May 2018] // Creative Southwark: Cultural Strategy 2017-2022. (Southwark Council, March 2017) // Images clockwise from top: Bold Tendencies opening; Kwamie working from a shared tailoring workshop in Peckham; GLA Creative Enterprise Zones prospectus.



## 1.2 Creative Enterprise Zone: Definitions

This report is based on three essential definitions that allow capturing creative enterprise activity in the proposed CEZ zone. These are:

Fig. 1



In this research creative enterprises are to be understood as any activity that either involves someone in a creative occupation or is part of a creative industry. This inclusive definition is widely adopted by government bodies (e.g. DCMS) and the research community (e.g. Nesta).

This definition is particularly important to the proposed Camberwell and Peckham CEZ area with its recognised supply chains and ancillary creative enterprise activity.

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Creative Industries Economic Estimates January 2014 (DCMS, January 2014)  
<[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/271008/Creative\\_Industries\\_Economic\\_Estimates\\_-\\_January\\_2014.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/271008/Creative_Industries_Economic_Estimates_-_January_2014.pdf)> [accessed 27 May 2018] // Bakhshi, Hasan, Ian Hargreaves, and Juan Mateos-Garcia, A Manifesto for the Creative Economy (Nesta, April 2013)

Fig. 2



The GLA framework for Creative Enterprise Zones and their four focal points (space, skills, policy and community) aligns with the research findings of this report.

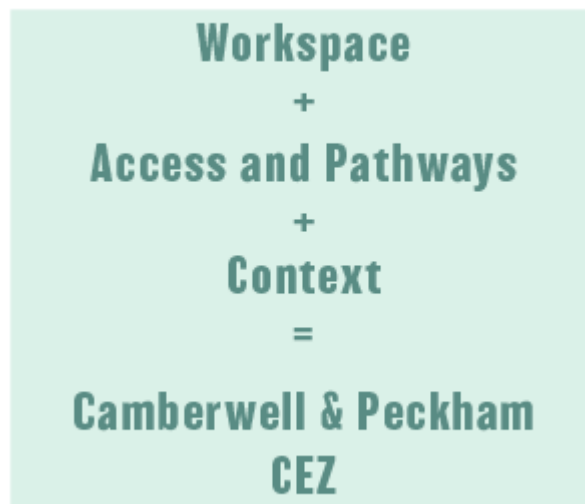
The GLA definition of a CEZ is a direct match to follow highlighted needs in the proposed Camberwell and Peckham CEZ area:

‘[The CEZ] will help start-ups, sole traders, micro-sized and small businesses that reflect London’s ethnic diversity, offering stability and enabling growth. They may help existing clusters of businesses to grow and raise levels of ambition.’

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‘Creative Enterprise Zones: Prospectus 2017’, *ibid.* p. 8-11.

Fig. 3

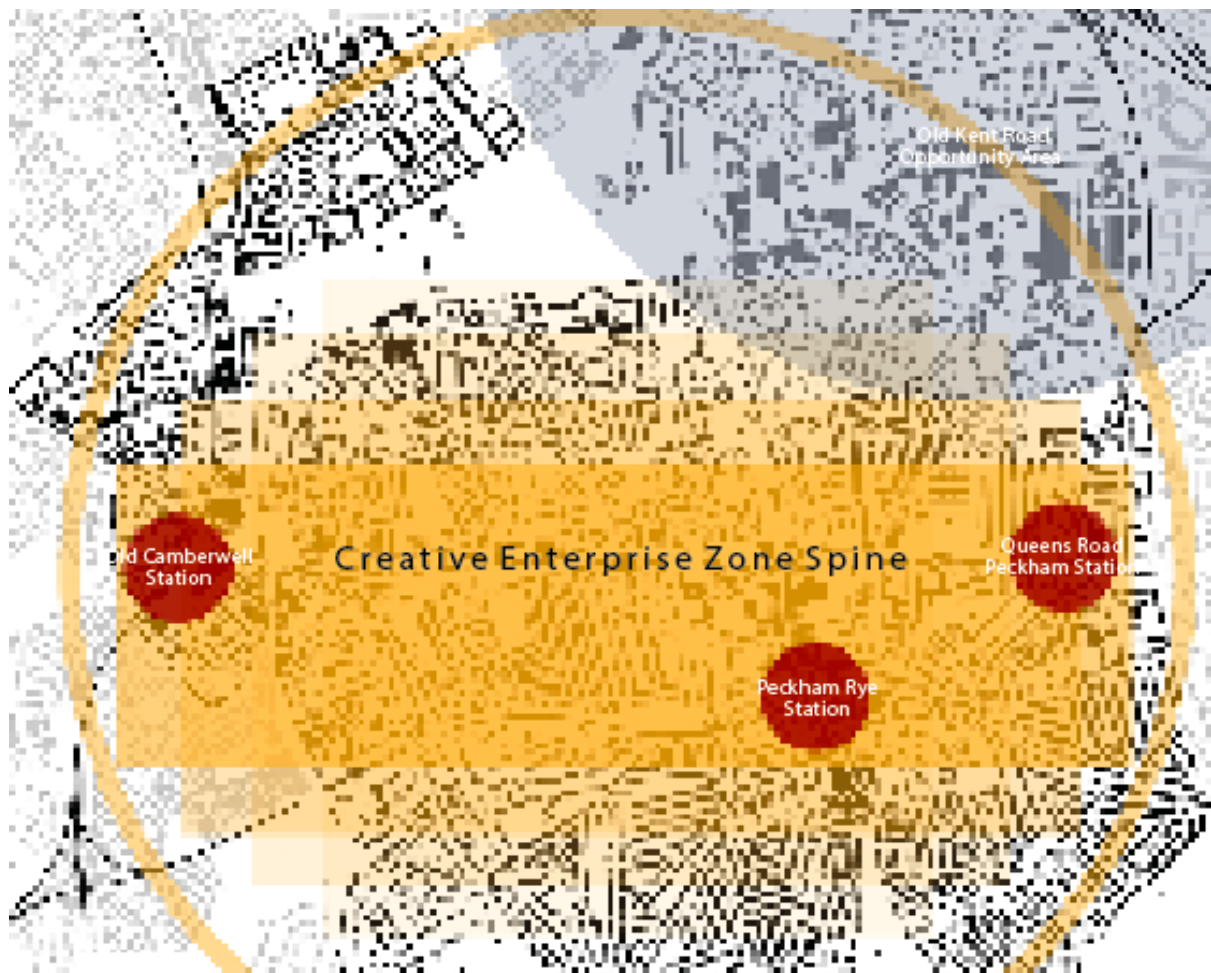


For the purpose of research into creative enterprise activity in Camberwell and Peckham a pragmatic framework has been adopted that will help to interpret findings and develop a meaningful action plan.

The three key elements in establishing a successful CEZ are:

- Workspace provision.
- Access to the wider creative economy in light of existing demographic hurdles.
- Supportive context for creative enterprises.

### 1.3 Geographical Delineation







The geographical delineation of the study area is centred around a spine between the former Camberwell Station to Queens Road Peckham Station via Peckham Rye Station.

The borders have been kept deliberately fluid and are guided by insight from the ground, with a view to capture a maximum of creative enterprises along and around the spine. As a result, a substantial 'halo' around the spine stretches all the way north including Burgess Park and East Street Market, and south towards Peckham Rye Park.

The proposed Creative Enterprise Zone also has a special relationship with the Old Kent Road area. Many creative workshops and businesses are currently located in this area and have informed the research. Due to its special status as Opportunity Area (OA) and its profound, imminent changes to its structure, the Old Kent Road OA is considered to be a roll out area for any interventions proven to be effective in the Camberwell and Peckham CEZ.

#### **1.4 Methodology & Research Strands**

##### **Secondary Research**

As a baseline, and to establish the research framework, a broad selection of existing policy reports and studies have been consulted (see Research Appendix and Bibliography).

Apart from **policy and research reports**, **case studies** of successful projects have been evaluated wherever applicable and meaningful in their applications to the specific needs in the Camberwell and Peckham area.

The selection of secondary research includes international, UK and London-specific reports and projects.

##### **Primary Qualitative Research**

It is crucial that the high proportion of freelance and sole trader activity in the area is recognised for a meaningful action plan. As statistics typically do not capture freelancers (see: 'Creative Nation' and Craft Council), **40 qualitative interviews** with a representative bandwidth of creative enterprises across the research area have been conducted (see: Research Appendix).

These interviews were complemented by **area walks** and **consultations with officers** at Southwark Council on specific issues and **workshops with the directors** at Southwark Council, and area **stakeholders**.

To capture specific needs, and to develop a foil for delivering the action plan, the '**Creative Consortium**, Camberwell and Peckham' was further developed and **three workshops** have been held (see: Research Appendix).

##### **Primary Quantitative Research**

Secondary research and interviews have highlighted the discrepancy between the creative activity patterns on the ground and available statistics (e.g. from ONS).

To address this, and to develop alternative, meaningful frameworks for measuring creative enterprise activity, a **quantitative online survey** has been conducted amongst local creative enterprises (see: Research Appendix). Even relatively small samples have confirmed adjacent findings from qualitative interviews.

In order to broaden the scope and to highlight the power of 'big data' analysis for the capturing of nebulous creative enterprise activity, a collaboration with a commercial market analysis provider has yielded valuable insight into employment, turnover and growth potential in the area (see: Research Appendix).

## Complementary Activities

In order to develop a wide awareness of the value of creative enterprises for the local economy and the need for a collaborative framework to strengthen it, three activities with wide appeal have taken place:

- A compendium of high quality **journalistic portraits of 12 creative enterprises** has been developed in collaboration with local newspaper *Peckham Peculiar*, reaching 13,000 readers in print and 24,000 online (13 June 2018).
- At *Camberwell Arts Festival*, **information stands and surveys among attendants** were presented and carried out (23 June 2018).
- A short **documentary of creative enterprises** was developed and released.

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Juan Mateos Garcia, Joel Klinger, and Konstantinos Stathoulopoulos, Creative Nation (Nesta) <[https://www.nesta.org.uk/sites/default/files/creative\\_nation-2018.pdf](https://www.nesta.org.uk/sites/default/files/creative_nation-2018.pdf)> [accessed 29 April 2018]

// Mündner, Sven, 'Creative Camberwell and Peckham: Consortium Meeting 1' (South London Gallery, 2018) // Preece, Sarah, and Sven Mündner, 'Creative Camberwell & Peckham Focus Group: Institutional Models' (Peckham Levels, 2018) // McGinlay, Mark, and Kate McGinlay, eds., *Creative Camberwell & Peckham. Pullout for the Peckham Peculiar, Peckham Peculiar*, June 2018 (London: Peckham Peculiar, 2018)

## Mapping & Findings

### 2.0 Definitions

**Open Workspace** is referred to in-line with the definition by the GLA: 'Open workspaces are managed and run by 'workspace providers' which can come in a variety of sizes, with a range of social to commercial aims, and specialisms in various sectors.'

**Flexible Workspace** is used in regards to spaces that can adapt to the changing needs of a specific tenant (grow or contract) as well as the entire area (e.g. accommodating future trends).

**Growth space** is defined as space needed by local creative enterprises to grow their businesses as opposed to staying in existing premises that artificially limit their growth potential.

**(Artist) Studio** is used here as a simple lockable unit that is occupied either by one or multiple sole traders or other creative enterprises. The emphasis here is on the fact that traditional artist studios are often used as an encompassing concept for creative enterprise activities other than fine art practice. There is no specific tenure pattern attached.

**Meanwhile space** is a quantity of space (usually for commercial activity or community use) that is given to an operator or user for a limited amount of time and under specific terms. The space will then be either let at commercial terms, demolished, or used in a different way. (See: the emerging New London Plan.)

**Night Time Economy** is used here with reference to recent studies, as the economic activity between 6pm and 6am, often linked to creative enterprises, and linked supply chain businesses.

**Micro- / Small Businesses** is used here with reference to employment: micro businesses with up to 10 employees, and small businesses with less than 250 employees.

**Traditional creative vs. new creative enterprises** is used in this report as a crucial phenomenon occurring in the Camberwell and Peckham area. It highlights those creative activities established for many decades (e.g. tailors supplying West-African communities) and how these compares to more recently established creative enterprises that are normally associated with the creative economy (e.g. graphic design, film production etc.).

**Creative cluster** is used as a concentration of creative enterprise activities (including non-creative supply chain activities) in one geographical area (see: New London Plan).

**Creative catalyst** is used here as a venue that has a particularly strong impact on the area, either through hosting many micro-businesses that trade with local enterprises, or through active programming into the (creative enterprise) community.

**Live-Work space** is space that can be used for residential and commercial purposes and reflects the trending patterns of 'working from home'. While previous models are restricted to a simple shared space for both activities, more recent versions show successful interpretations such as 'tethered work-live space' that hold a work unit and a residential unit under one tenure.

## 2.1 Creative Enterprise Activity in Camberwell & Peckham

### 2.1.1 Existing Creative Activity

For many decades the Camberwell and Peckham area has shown high levels of creative activity, fuelled by two large universities with creative programmes, cultural institutions, cheap workspace and informal networks.

The existing creative cluster, however, is not fully studied in its size, outputs, resilience or impact, nor is the current activity connected in a formalised structure that could assist in analysing such activity.

Apart from one independent study on creative enterprises in 2007 on the Camberwell and Peckham area, there is little robust insight into trends and spread.

A starting point is to compare nationwide statistical data with the corresponding factors in the proposed CEZ area (businesses and employment by SIC codes). It is widely acknowledged that creative clusters are difficult to understand through this statistical data only (see: Nesta). Especially difficult is the trend towards freelance work, which has doubled in the creative economy since 2008, and multiple occupation and shared workspace. This results from general statistical data holding little value for understanding the fine grain of the proposed Camberwell & Peckham CEZ area.

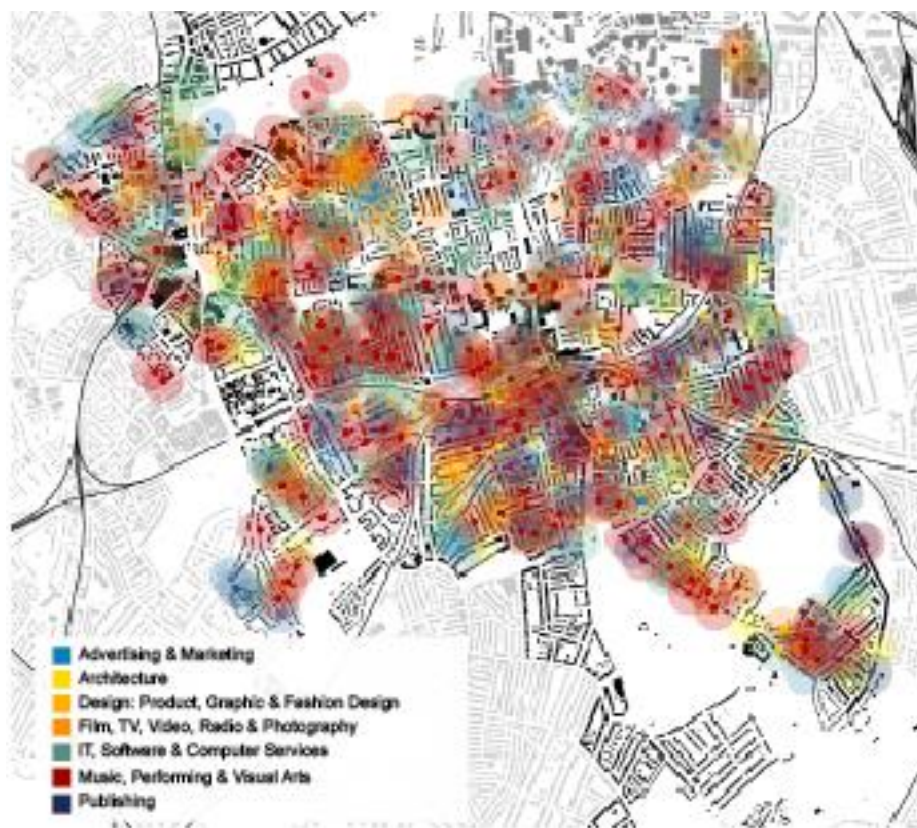
As a starting point, however, the official data (SIC code-related) has been mapped.

#### Conclusions:

- Statistical data from official data sources (ONS, HMRC etc.) do not provide the grain detail necessary to develop meaningful conclusions and action plans to safeguard and strengthen the creative economy in the proposed CEZ area.

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Mateos Garcia, et al, *ibid.* // 'Creative Business Activity by SIC Codes in the Proposed Camberwell & Peckham CEZ Area' (Southwark Council, 2018) // Jenkins, Kayte, Exploring the UK Freelance Workforce in 2016 (IPSE & Small Business Research Centre Kingston University, February 2017) // Fleming, Tom, Report on the Findings of the Camberwell Creative Sector (tom fleming creative consultancy, December 2007)



Creative Industry businesses identified by SIC codes and postcode in analysis provided by Mint Data to LB Southwark in May 2018. Businesses are widely spread with no distinctive concentration where, anecdotally, there should be. 'Creative Business Activity by SIC Codes in the Proposed Camberwell & Peckham CEZ Area', *ibid.*

### 2.1.2 Official Creative Activity & Labour Data

A closer look at official statistics reveals in greater detail that these figures do not capture the full extent and character of creative enterprise activity on the ground. All official statistics have been screened to understand the data available for the proposed CEZ area. The results are as follows:

**Employment statistics as captured via SOC** codes (Standard Occupational Classifications, Office for National Statistics) are mainly limited due to their infrequent measurement linked to Census data (latest data set from 2011).

At the last count, the total number of employees in the proposed CEZ was 7,981 which amounts to just under 10% of all economically active CEZ residents in 2017. It is reasonable to assume that the number has grown, especially around self-employed and creative activity.

**Business counts and categorisations as captured by SIC codes** (Standard Industrial Classification) are limited in reach, as it does not incorporate creative enterprise activity and omits large parts of creative enterprise activity due to the nature of classification. It does, however, provide a helpful benchmark from which to assess the proposed CEZ's recent growth, scale and employment characteristics. These benchmarks have been established as:

- The number of Creative Industry Businesses in the area has grown by 74% between 2010 and 2017. This compares to 34% London wide.
- 97% of businesses are of a micro scale, employing under 4 employees.
- Only 1% are categorised as small, with between 10-49 employees, contrasting with 4.5% for the London average.
- 25% of businesses in the CEZ area are classified as creative compared to 19% across London.

Creative Industry Business Size	CEZ	London
Micro 0-4 Employees	97%	89%
Micro 0-9 Employees	99%	94%
Small businesses (10-49 employees)	1%	4%
Medium / Large (50-250+ employees)	0%	1% / 0.2%

**74%**  
growth of creative industries  
businesses in the proposed  
CEZ area.

Creative vs. Non Creative	CEZ	London
Total Creative (SIC Codes)	1,055	96,915
Total Businesses	4,125	505,655

**97%**  
are micro-scale businesses  
in the area.

Demographic	CEZ	London
Self-employed	16.8%	13.5%
Self-employed (male)	16.1%	17.6%
Self-employed (female)	17.3%	9.4%

**25%**  
of businesses in the CEZ area  
are classified as creative.

Top: All data based upon the DCMS's Creative Industry SIC codes and ONS / Nomis 2017 Business Count: 'Nomis - Official Labour Market Statistics', Nominis - Official Labour Market Statistics <<https://www.nomisweb.co.uk/>> [accessed 23 June 2018] Bottom: ONS Annual Population Survey, 2017. 'Office for National Statistics', ONS <<https://www.ons.gov.uk/>> [accessed 23 June 2018]

### 2.1.3 Statistical vs. Direct Data

A direct sample comparison of mapped creative economy activity in the proposed Camberwell and Peckham CEZ shows the importance of data available in order to design meaningful interventions for the creative economy.

The left-hand map shows creative businesses as tracked by business SIC Codes. The right-hand map shows business rates relief granted as a better indicator of micro creative enterprise activity (see also 2.4.4).



The key differences become apparent around big clusters of shared workspace such as Peckham Rye car park (Peckham Levels) and Copeland Park where multiple creative (freelance) practitioners occupy larger units. This does not feature in the statistical SIC data.

**Conclusions:**

An action plan needs to be complemented with a comprehensive, bespoke and continuous evaluation framework that tracks freelance, multiple-occupier activity on premises, through direct surveys, membership statistics or demographic/social media analysis.

**Mapping of SIC Codes**



Areas where a high concentration of creative enterprise activity is expected through observation on the ground (Peckham Levels & Copeland Park) do not show a correlation in SIC Code mapping according to the DCMS creative business categories (see red circles). Creative enterprise activity across the proposed CEZ area. 'Creative Business Activity by SIC Codes in the Proposed Camberwell & Peckham CEZ Area.' Ibid.

## Data from Business Rates Relief



Data received from Southwark Council Income department as part of this research, showing a high density of small business units and related Business Rates relief in places that SIC statistics do not (see red circles). This suggests a closer correlation between Business Rates relief and observations on the ground, however, no reliable conclusion can be drawn between Business Rates relief data and creative enterprise classifications. To complement this, a survey on the ground was conducted as part of this research report to complement the official data. Due to time constraints this survey is not comprehensive (see Research Appendix). Yet, it highlights the need for broad and continuous surveying on the ground as part of the CEZ framework. 'Tell Us about Your Creative Business in Camberwell and

## 2.2 Space for Creative Enterprises in Camberwell & Peckham

Access to suitable space is a vital factor to sustain, grow and develop the creative economy in the Camberwell and Peckham area. The crucial factors will be to safeguard forms that are unnecessarily under threat; prevent large clusters to fail; and use planning processes wisely to safeguard and develop space that is in-line with the needs of the creative economy. Without the right quantity and quality of space the creative cluster will most likely fail.

### 2.2.1 forms of Creative Space

Apart from a few larger clusters of workspace (e.g. railway arches, Copeland Park) the creative enterprises are largely nestled into the existing urban grain of Camberwell and Peckham.

**Traditional ground floor shop units** play a key role in providing space for creative activity around beauty services and tailoring, as well as supply chain businesses (DIY stores, material stocks) for creative activity, and increasingly cafés and restaurants as a wider support network for freelancers and creatives. **Stand alone commercial blocks** are key in providing several units for creative enterprises next to each other and in providing flexible space for changing industry trends or individual business expansion. Some **industrial units** are scattered across the area and are vital in allowing for 'dirty & dusty' activity to be near the creative economy cluster (e.g. a metal worker supplying a sculptor). Where the above forms are generally 'under threat' and in retreat in the larger context of regeneration, increasing numbers of **speculatively built and unused ground floor shop units** become part of the commercial landscape.

#### Conclusions:

Clear, coherent and firm planning policy is necessary to identify, safeguard and promote forms and land use designation that is conducive to the creative economy. This policy should equally prevent the speculative development of space without specified uses and tenants.

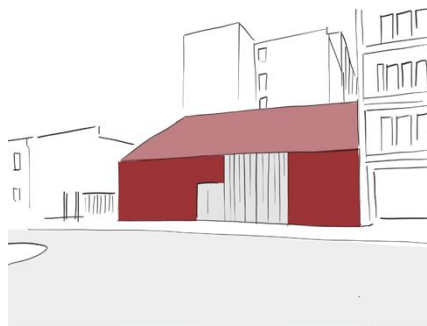




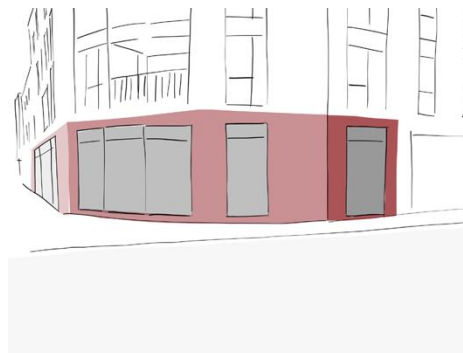
(Modified) shop fronts especially in town centres. These ground floor shops have multiple adoption cycles and often have multiple occupiers.



Stand-alone commercial buildings hosting multiple businesses and freelance practitioners in one block.



Industrial units nestled into residential blocks. These units are increasingly rare in the proposed CEZ area but are vital in keeping the creative economy supply chain in close proximity.



Speculatively built ground floor commercial units that are not occupied. This typology is increasingly prevalent in the proposed CEZ area and a lost resource to the economy.

### **2.2.2 Similarity of Creative & Traditional Micro Enterprise Space**

Both traditional creative enterprises and trending creative industries in the proposed CEZ area show similar patterns of tenure for their operational spaces. These include:

- Multiple occupation units (ground floor shops and/or industrial units) with mostly informal rental arrangements (no contract, Tenancies at Will). This pattern is highlighted as 'urban mutualism' by Suzanne Hall' in Ordinary Streets.
- Formal shared workspace occupation with a range of informal and formal rental arrangements.
- Markets as a trading platform with mostly simple contractual arrangements.

All of the patterns above are widely used, allow flexibility for micro businesses and startups. They also are strikingly similar across various ethnic groups, industries (graphic design, traditional tailoring etc.) and could be used to enhance exchange between currently siloed enterprise communities.

The structure of the above tenure patterns for all its flexibility, however, does not allow business growth and is cost-inefficient in the long run for businesses.

### Conclusions:

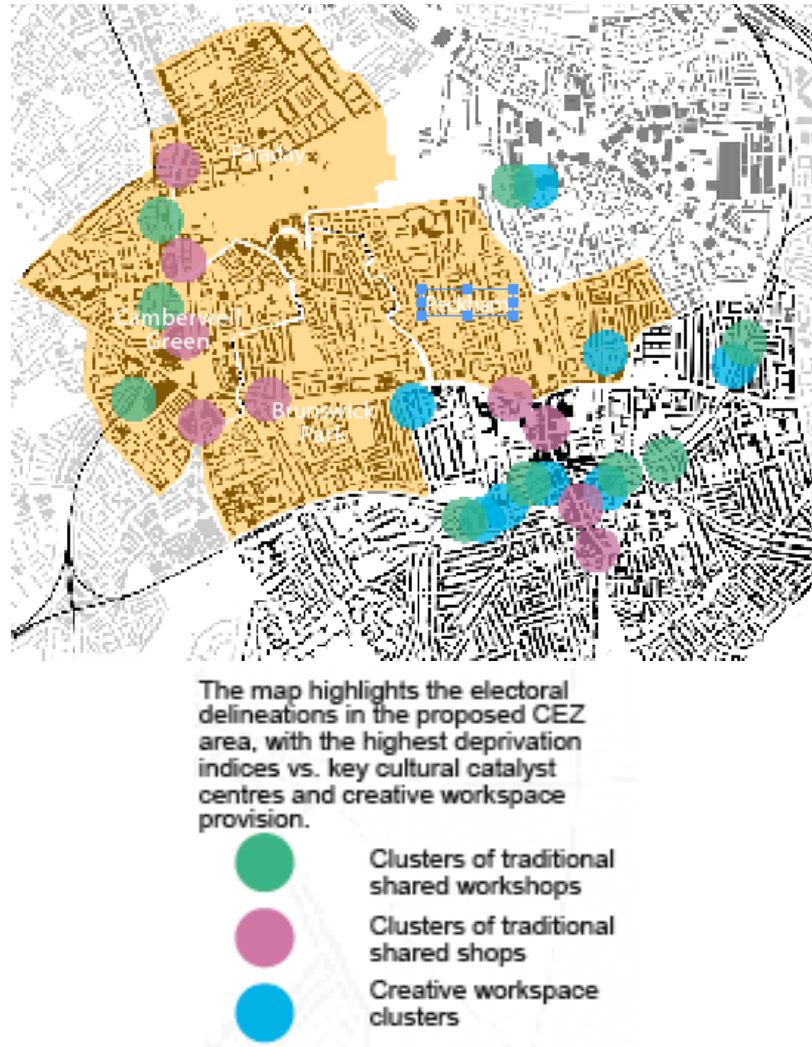
- Multiple occupation of units and shared workspace models as predominant commercial space provision in the area would benefit from clear advice around tenancies and flexible business rates structures.
- 
- Market activity, multiple occupation and shared workspace should be actively promoted in planning and wider policy for the area.

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Hall, Suzanne, City, Street and Citizen, 1 edition (London: Routledge, 2013) // LSE Cities, Ordinary Streets <<https://www.youtube.com/watch?v=9bKWv2ljyIM>> [accessed 29 May 2018] // Young, Adriana, Planning & Selling Rye Lane <<https://issuu.com/betterthanliving/docs/ryelane>> [accessed 29 May 2018]



### 2.2.3 Proximity of Creative & Traditional Micro Enterprises



Creative workspace clusters near areas that are also occupied by traditional micro businesses:

They are not only similar in size and habitation practice, but also adhere to similar ad hoc, short-term rental structures.

While in Peckham the geographical spread is nearly identical between traditional and creative enterprises, the Camberwell area shows very little creative workspace provision.

#### Conclusions:

The profound similarity in spatial uptake and rental practice is an opportunity that can be exploited for greater diversity.

There is a danger that incoming creative workspace demand increases displacement pressure on traditional activity and spaces.

## 2.2.4 Ordinary Streets = Mature Productivity

A lot of productivity is hidden in ordinary streets.

While the focus has been on young startups being run out of bedrooms, Camberwell and Peckham shows a high percentage of mature and highly productive freelance consultancy and services run out of family homes.

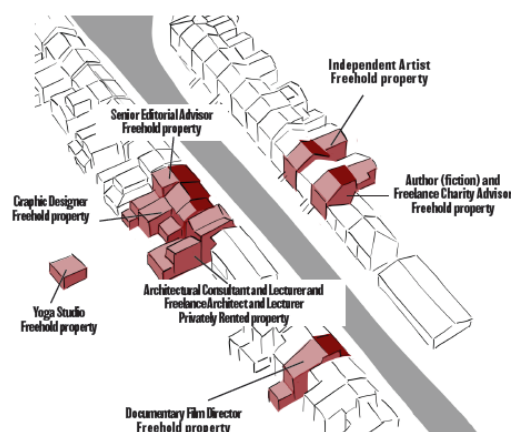
This shows many signs of the densification aspirations in the New London Plan (GLA) and shows very high productivity levels.

### Conclusions:

- A high percentage of household productivity is located in privately rented and freehold properties and out of the remit of direct intervention.
- Key attractions for this activity to remain and flourish in the area are general positive operating conditions such as childcare, educational facilities, transport links across London, parks, and a generally creative environment.
- Similar opportunities should be available to forthcoming generations.
- While this model is sustainable and productive, it does not improve productivity (Creative Nation, 27-32), nor is there a secure path into this model for the next generation of creative freelancers.

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Cauldwell, Caroline, and Eliza Easton, Creative Freelancers (Creative Industries Federation, July 2017) <<https://www.creativeindustriesfederation.com/sites/default/files/2017-07/Creative%20Freelancers%201.0.pdf>> [accessed 27 May 2018] // Jenkins, *ibid.* // 'The London Plan - The Spatial Development Strategy for Greater London - Draft for Public Consultation' (Mayor of London, 2017) // Mateos Garcia, et al, *ibid.*



An example of a typical residential street in the Camberwell and Peckham area highlighting the rich concentration of mature creative activity run out of private space.

## 2.2.5 Low Density of Open Workspaces

As mapped above, creative enterprises operate from a great range of informal spaces.

In general, security of tenure, pressure on rent levels (2.2.7), and potential threat to premises (2.2.8-9) will only increase pressure on existing operating models of existing creative enterprises in the proposed CEZ.

In other parts of London, especially the north east (e.g. Hoxton, Shoreditch, London Fields), an increasingly dense network of formalised (shared) workspace provision has encountered some similar pressures on creative enterprise activity. This includes studio spaces, work units, office units and shared desktop space.

Surprisingly, the formalised shared workspace offer in the Camberwell and Peckham area is significantly lower than in the north east or even in neighbouring Brixton, though demographics' activity patterns are largely similar.

### **Conclusions:**

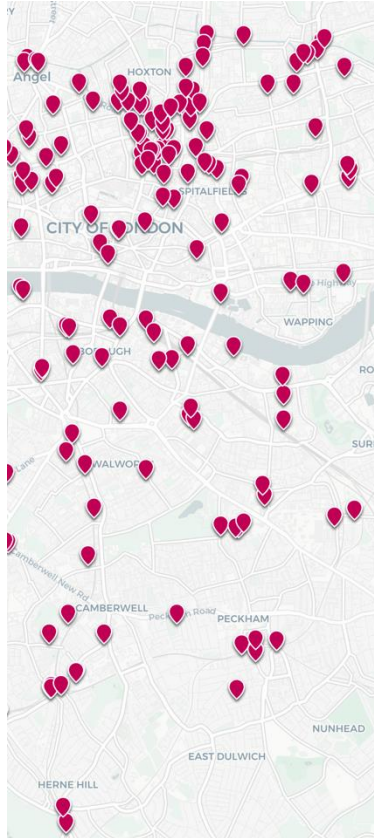
- Increased provision of shared workspace facilities with formalised and robust tenure structures would help mitigate a net loss of creative enterprise activity due to increasing pressure on existing workspace forms in the area.
- Priority planning policy and guidance can help to increase the offer in the area and formalise existing workspace arrangements in case of refurbishment.

### References

Creating Open Workspaces, Regeneration Guide (GLA, July 2015)

<[https://www.london.gov.uk/sites/default/files/regeneration\\_guide\\_2\\_-\\_creating\\_open\\_workspace.pdf](https://www.london.gov.uk/sites/default/files/regeneration_guide_2_-_creating_open_workspace.pdf)> [accessed 30 May 2018] // 'London Workspaces' (GLA)

<<https://maps.london.gov.uk/workspaces/>> [accessed 30 May 2018] // Cultural Infrastructure Plan / Artists' Workspace Study / Preliminary Data of Existing and Emerging Open Workspace for Creative Enterprises (GLA, June 2018)



Relatively low-density of open workspaces available in the Camberwell and Peckham area in comparison to northern parts of London. 'London Workspaces', *ibid.*



'Cultural Infrastructure Plan / Artists' Workspace Study / Preliminary Data of Existing and Emerging Open Workspace for Creative Enterprises', *ibid.*



### 2.2.6 Lack of Space for Growth

While over the past years creative enterprises have been attracted to the Camberwell and Peckham area, the current spatial offer creates a danger of stagnation in three ways:

- Supply is not meeting demand for creative enterprise space with workspace providers such as Copeland Park having waiting lists of 500+.
- Due to lack of overall space, creative enterprises do not move to a more suitable space when circumstances change: businesses that have growth potential stay put due to space restrictions; businesses that shrink hold on to their venues and enter into sub-lease chains of their workspace.
- Additional pressure is created by creative enterprises that sub-let their original premises in other London locations (e.g. Shoreditch) at higher rental premiums and occupy less expensive units in the Camberwell and Peckham area.

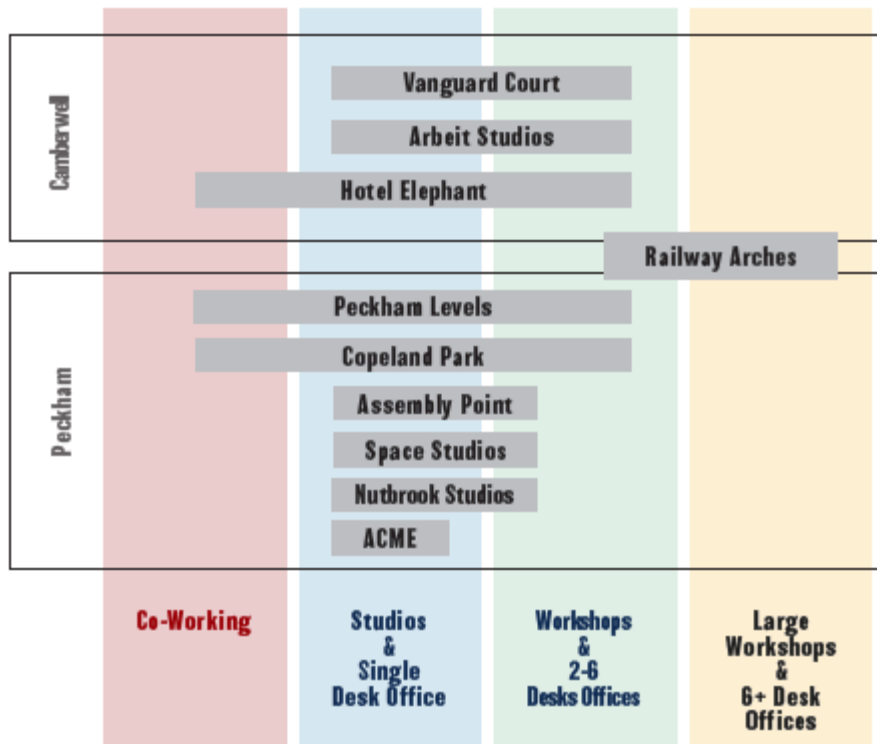
A crucial element in creating sustainable creative clusters is to address the 'ladder of growth' in order to evolve from the early stages of establishment (e.g. Bazalgette, 39). In terms of space in the proposed CEZ area, a lack of space to move on to from incubation stage units is major hurdle in regard to a successful growth trajectory.

#### Conclusions:

- Workspace provision in the proposed CEZ area needs a holistic approach which creates offers across the scale in terms of size and suitability for maturity of enterprise.
- An increase of workspace provision paired with programmes to move enterprises on from early stage space will help to avoid 'stagnation'.

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Brooke, Rory, Greg Openshaw, Lucy Farrow, Fiona Scott, Gemma Drake, Rob Harris, and others, *Supporting Places of Work: Incubators, Accelerators and Co-Working Spaces* (URS, January 2014) // 'Creating Open Workspace', *ibid.* // Bazalgette, Sir Peter, *Independent Review of the Creative Industries*, September 2017.



Shown example workspace providers are not comprehensive, but represent the bulk of structured workspace provision in the proposed CEZ area. Scattered, privately let units are not considered.

### 2.2.7 Workspace Rent Level Spread & Tenure Pressure

Cost of workspace for creative enterprises in the area are currently in-line with overall London trends.

While existing artist studio contracts may benefit from old preferential rates, new offers tend to be above the area average (£22 per sq. ft.) and above the London average (see: GLA workspace study). This is mainly fuelled by long waiting lists and pressure from incoming mature creative enterprises from other London areas (see: 2.2.6).

Co-working space prices are currently slightly below the London average, as the area only recently started to be known for this offer.

#### Conclusions:

- Rent level trends show an increasing pressure on creative enterprise space and will have to be addressed in a coordinated way to avoid an imminent stagnation or loss of creative activity.

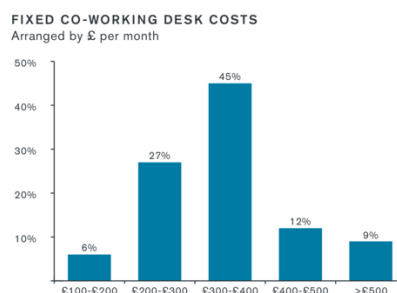
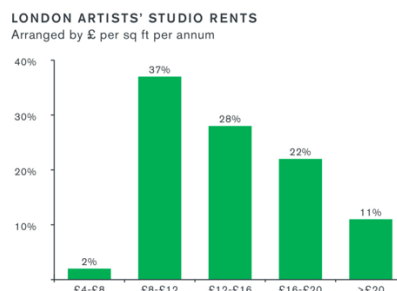


Studio Space Rent Spread		
Rent p. sq. ft.	Landlord/Operator	Notes
£ 0-17	Railway Arches	net rent / 6 mth. to 5 year contract
£12	ACME Studios	all inclusive costs except electricity
£ 16	Vanguard Ct. Unit	net rent / 5 year contract
£ 25+	Copeland Plk. Studio	net rent / all < 5 year
£ 5-35	Peckham Levels Studio	net rent / < 5 year contracts
£ 35	Vanguard Ct. Studio	net rent / Tenancy at Will

**Studio Market Average Rent in Peckham and Camberwell Area**  
£22 per sq. ft. net rent\*

**Indicative Shared Desk or Membership for Shared Workspace Rates in the Camberwell and Peckham Area**  
£ 150 - 330 per month (approximately 40 sq. ft. per desk)

Spread of rent levels drawn from primary research (interviews) with studio operators and Creative Enterprises. \*Area rent level research by Peckham Levels, primary research (interview).



'Creating Open Workspace', ibid. p. 21.

## 2.2.8 Spatial Threats - 'Too Big to Fail'

Apart from a general pressure through demand and a lack of space designed for enterprise growth, there are systemic threats to the current space provision for creative enterprises, represented by a handful of bulk space providers that are 'too big to fail'. The loss of any of them would have a severe impact on the creative activity in the entire area.

Imminent systemic threats to suitable space provision are mainly represented by:

- The looming sale of the commercial space portfolio of Network Rail. Many of the affordable workshops suitable for manual processes and craft are located in railway arches and have either already been put under pressure, or occupiers are worried

that their sale will result in terminated contracts or unaffordable rents. The majority of occupants interviewed stated that they would have to leave the area (see also: 2.2.9).

- Development pressure on Camberwell and Peckham high streets through land assembly and imminent re-development.

More abstract threats are represented by the sheer percentage of space provision of Vanguard Court and Copeland Park, as examples. Both are privately owned and could become subject to re-development.

### Conclusions:

- The systemic risk should be spread by a strategic area workspace provision plan to reduce the area's exposure from a 'too big to fail' dilemma
- Careful planning should be implemented to create suitable workspace on site re-provision in case of incoming development of these sites.
- Emergency plans should be developed in case any of the above sites do 'fail' to provide creative enterprise space (e.g. structured decanting).



Spread of rent levels drawn from primary research (interviews) with studio operators and Creative Enterprises.

### 2.2.9 The Railway Arch Challenge

Approximately 2.7 km of railway arches run through the proposed CEZ area, containing over 200,000 sq. ft. of potential letting space. The majority of these arches are under the ownership of Network Rail who are currently planning to sell their assets to a third party.

The majority of arches are occupied and nearly all tenants are on very short-term leases. A vast number of tenants are involved in creative enterprise activity (e.g. furniture designers, knifemsmiths) or the connected supply chain (e.g. metalworkers, carpenters). Railway arches are not only cost effective workspace provision for startups, but also allow light industrial activity to be undertaken with great level access required by many of these businesses.

Through Network Rail's sale of its commercial portfolio, the future of existing creative enterprise tenants and major development sites in the CEZ is highly uncertain.

LBS have developed a number of gold standard collaborations with Network Rail with secure, long-term leases and strategic use concepts that benefit creative enterprises and the wider area. These include:

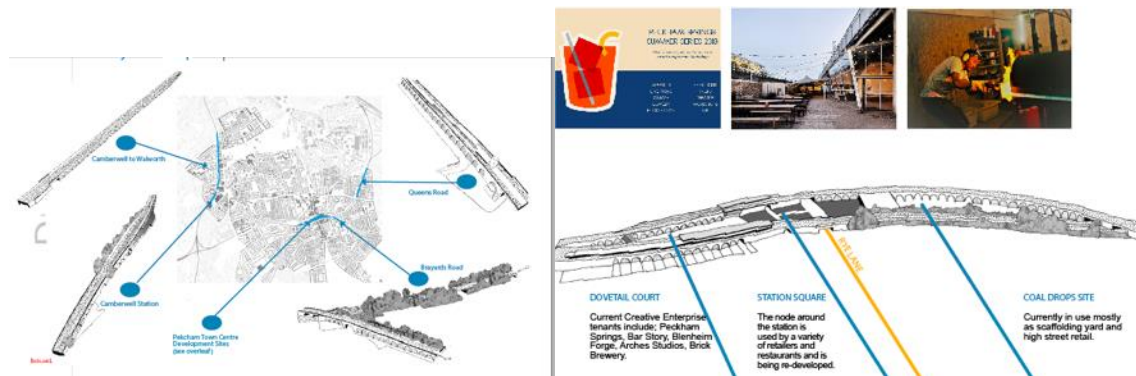
- Spa Terminus
- The Lowline, London
- Hotel Elephant
- The Coal Line

### Conclusions:

- The railway arches in the proposed CEZ area should be considered as part of any strategy review to safeguard space

‘Spa Terminus | Wholesalers & Food’ <<https://www.spa-terminus.co.uk/>> [accessed 15 June 2018] // ‘The Low Line | Better Bankside’ <<http://www.betterbankside.co.uk/buf/the-low-line>> [accessed 15 June 2018] // ‘Hotel Elephant Workspace’, Hotel Elephant Workspace <<https://hotelelephant.co.uk/>> [accessed 23 June 2018] // ‘Peckham Coal Line’, Peckham Coal Line <<http://www.peckhamcoalline.org/>> [accessed 15 June 2018]

## Railway Arches Spread



### 2.2.10 The Meanwhile Site Pipeline

Camberwell and Peckham creative enterprise activity has recently benefited from Meanwhile space provision.

Meanwhile space provision has recently seen trends towards ultra-short-term space handed over by private developments to creative enterprises as part of planning obligations.

The meanwhile space provision in the Camberwell and Peckham area following a successful collaboration with Bold Tendencies at Peckham Rye car park, is now mainly initiated by Southwark Council.

The success factors of Meanwhile provision in the area are:

- Establishment of a Meanwhile site provision ‘pipeline’ with a series of opportunities delivered, in progress, and identified for possible future use. This ‘pipeline’ helps to retain creative enterprises in the area after a specific Meanwhile use is terminated.
- Thorough briefs for and complex contractual arrangements with successful bidding operators of Meanwhile sites.

- Internal learning processes for future Meanwhile projects in place.

### **Conclusions:**

- Following a successful engagement with Bold Tendencies, Southwark Council has adopted a proactive attitude towards Meanwhile opportunities. This should be continued.
- The Meanwhile pipeline should be established as a structured programme and communicated as such to the wider creative enterprise community.

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Derived from primary research interviews with Southwark Council Culture, Planning and Regeneration departments, Bold Tendencies and Peckham Levels (see: Research Appendix).

### **2.2.11 Medium-Term: Specific Development Opportunities**

Across the proposed CEZ, key sites have been identified for re-development. Some of these sites also hold the potential for significant commercial space provision.

In order to address the pressure and specific threats to creative enterprise spaces in the area, these sites can not only absorb pressure, but be put to use to deliver a long-term vision for sustained creative enterprise growth in Camberwell and Peckham.

As none of the sites have incorporated advanced stages of re-development proposals, there is still an opportunity to align them with a wider creative enterprise strategy.

### **Conclusions:**

- A vision and workspace strategy should be developed and implemented across all identified development sites to address the long-term needs of creative enterprises and to establish a sustainable growth trajectory for the sector.
- The opportunity sites for new, sustainable and strategic workspace provision are evenly spread across Camberwell and Peckham and help towards fostering an even development of the CEZ throughout the area.

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New Southwark Plan: Preferred Options. New and Amended Policies (Southwark Council, June 2017)

<<https://www.southwark.gov.uk/assets/attach/3870/NSP%20Full%20New%20and%20Revised%20Policies%20optimised.pdf>> [accessed 29 May 2018] // Peckham and Nunhead Area Action Plan (Southwark Council, November 2014) <<https://www.southwark.gov.uk/planning-and-building-control/planning-policy-and-transport-policy/development-plan/area-action-plans?chapter=4>> [accessed 29 May 2018] // 'The London Plan - The Spatial Development Strategy for Greater London - Draft for Public Consultation' (Mayor of London, 2017)



Key development sites in the proposed CEZ area that could hold a significant workspace quantity. This does not represent all development sites in the area.

### 2.2.12 Long-Term Spatial Opportunities

In the long-term, spatial opportunities for commercial workspace provision hold many opportunities to create sufficient space for a resilient and sustainable creative enterprise cluster in Camberwell and Peckham.

In this context there are three geographical areas that play specific roles:

- The Peckham area has sufficient new workspace provision identified in new developments to accommodate shifting workspace provision and to alleviate potential loss from expired Meanwhile provision or loss from re-developments.
- The Camberwell area holds the biggest growth potential for creative workspace. At key sites such as the Magistrate's Court, new workspace provision created should address spatial needs that are currently in low supply in the area (e.g. flexible space for businesses in more mature stages).

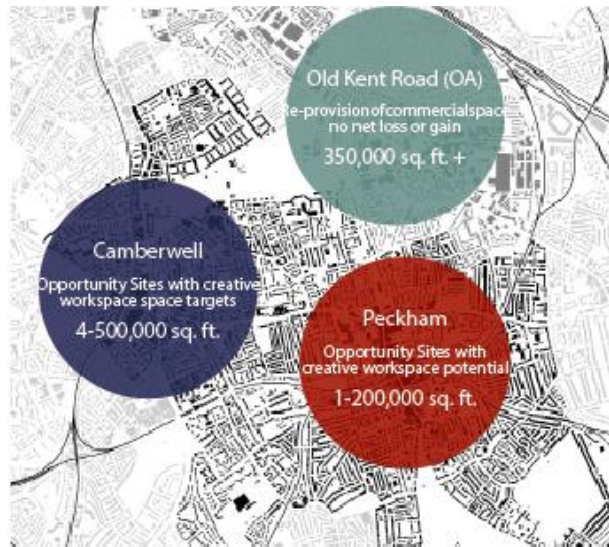
#### Conclusions:

- In the long-term Camberwell and Peckham has the potential to develop a resilient spatial offer for creative enterprises which can be complemented by light industrial space provision.
- A resilient and overarching framework is required to ensure that the right space (mix of forms and land use, detailed design) is delivered gradually and with an appropriate variety of tenures.

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Peckham and Nunhead Area Action Plan, *ibid.* // Old Kent Road: Area Action Plan & Opportunity Area Planning Framework Consultation / DRAFT (Southwark Council, December 2017) // 'Southwark Council Adopted Policies Map' (Southwark Council, 2015) <<https://geo.southwark.gov.uk/connect/analyst/mobile/#/main?mapcfg=Southwark%20Adopted%20Planning%20Policies%20Map>> [accessed 29 May 2018]





Approximate aggregated commercial space targets and/or planning conditions for the Camberwell and Peckham area. Also showing targets for no net loss re-development of commercial space in the Old Kent Road Opportunity Area.

## 2.3 Creative Demographics & Skills in Camberwell & Peckham

As an existing creative cluster the Camberwell and Peckham area is drawing on, and is embedded in, a complex set of demographics. It is vital to consider creative enterprises and residents of all age groups from the start.

A first glimpse shows that bridges between a young residential demographic and creative enterprises have to be developed and strengthened to ensure that the cluster is resilient and benefits local residents across all demographic facets.

### 2.3.1 Demographics in the Area

The demographic across the proposed CEZ area is ethnically diverse. A large proportion of the area (political wards until May 2018, including Faraday, Camberwell Green, Peckham and Brunswick Park) shows significantly higher ethnic diversity in comparison to the wider borough. In these wards the broad Black ethnic group is the single largest ethnic group. According to the 2011 census, 54% of the Southwark population were White and 27% Black. Across the above wards a greater proportion of the population are from a Black minority group (42%) and less identifying as White (38%).

These wards also comprise a larger proportion of children than the rest of Southwark.

It is generally acknowledged that diversity both in terms of race and age in the creative sector is not fully addressed yet.

A 2014 report from Arts Council England shows that across the creative and cultural workforce as a whole, 7% of employees in 2011/12 are from a Black and minority ethnic background (14.6% overall BAME percentage of the population). This has been confirmed by a more recent review of the creative industries in the UK which shows that 11.4% of creative industry roles were held by BAME employees, above the industry average, but below the BAME proportion of the UK's population. According to Peter Bazalgette, 'this is particularly noticeable in London where the BAME proportion is higher.' (Bazalgette, 42).

Yet, a general flaw in these studies is that often traditional, ethnic creative jobs (e.g. bespoke tailoring of West-African Sunday bests) are not taken into account. As these jobs are mostly freelance occupation, it is imperative for the proposed CEZ to capture and

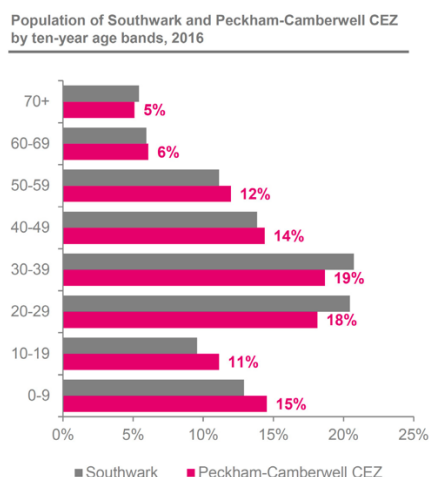
monitor this creative activity, as well as support and safeguard it to ensure the diverse creative sector in Camberwell and Peckham is sustained.

### Conclusions:

- Establish a robust evaluation framework that captures all creative enterprise activity including traditional and ethnically rooted enterprises and freelance work (e.g. traditional tailoring and nail design).
- Promote traditional and ethnically rooted creative enterprises as part of the creative cluster in the proposed CEZ area.
- Establish clear access routes for children into the creative sector. Showcase creative activity and career opportunities to young and BAME demographics in the context of reduced creative education at secondary school level.

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Fenton, Kevin, Profile of Camberwell to Peckham Creative Enterprise Zone (Southwark Council, May 2018) // Parkinson, Andy, and Jamie Buttrick, Equality and Diversity within the Arts and Cultural Sector in England (Arts Council England, September 2014) // Bazalgette, ibid.



Fenton, ibid.

### 2.3.2 Deprivation in the Area

The wards previously highlighted also show high levels of deprivation; a factor that has been widely acknowledged as being a barrier to widespread participation in creative activity.

62% of residents in the highlighted Southwark wards do (Faraday, Camberwell Green, Peckham, Brunswick Park, pre-May 2018). A considerable proportion of children in these areas live in poverty, from 15% in Brunswick Park, to 35% in the Faraday ward.

Ethnic minorities and individuals from disadvantaged backgrounds are facing the biggest challenges in regard to entering in and progressing through creative industry sectors. Approximately 92% of creative industry jobs are currently occupied by more advantaged groups of the workforce, and across the sector social mobility is a big challenge. 11.4% of creative industry roles were held by BAME employees, which is higher than the industry average, but below the BAME national demographic average.

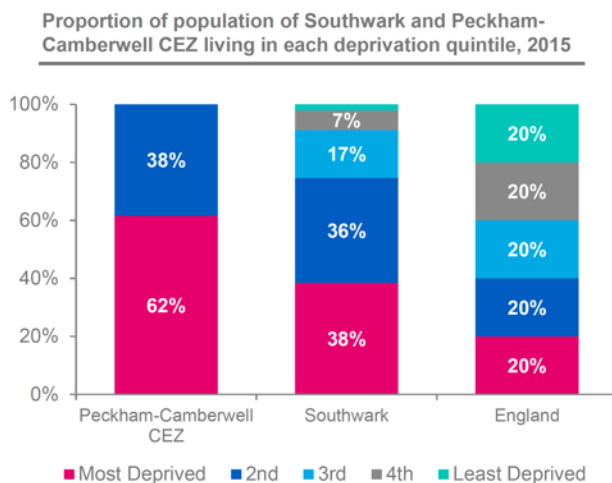
Access to the rich cultural offer of the area has only been addressed at institutional level (e.g. Peckham BMX, South London Gallery's Art Assassins, Bold Everywhere). Bridges into the creative enterprises and careers, however, are rare and often only temporary (as is addressed by London Youth Support Trust).

**Conclusions:**

- An Action Plan should firmly address the need for sustainable and continuous bridges for young and local residents into creative careers, especially from deprived backgrounds.

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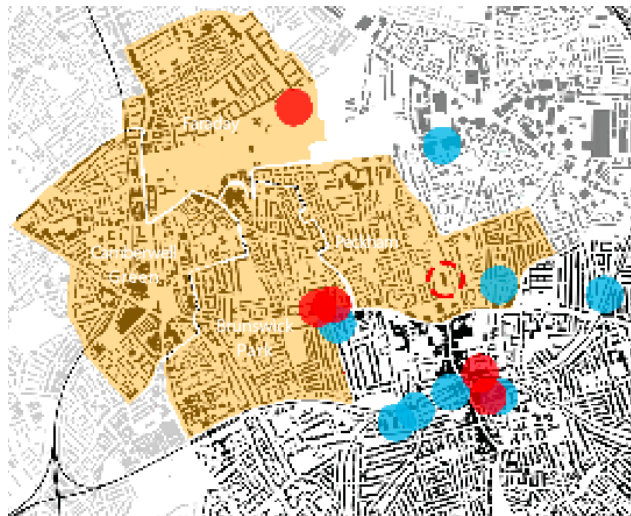
Fenton, *ibid.* // Bazalgette, *ibid.* // 'Peckham BMX Club' <<http://www.peckhambmx.co.uk/>> [accessed 11 June 2018] // 'Art Assassins - South London Gallery' <<https://www.southlondongallery.org/projects/art-assassins/>> [accessed 11 June 2018] // 'Bold Tendencies | Community & Education' <<http://boldtendencies.com/community-education/>> [accessed 11 June 2018] // 'Peckham Enterprise Centre', London Youth Support Trust <<http://www.lystbusiness.com/our-centres-old/peckham-enterprise-centre/>> [accessed 11 June 2018]




Fenton, *ibid.*



### 2.3.3 Deprivation & Creative Activity



The map highlights the electoral delineations in the proposed CEZ area with the highest deprivation indices vs. key cultural catalyst centres and creative workspace provision.

-  Key creative catalysts
-  Emerging creative catalyst
-  Key creative workspace clusters

A top-line mapping exercise shows that creative enterprise in the proposed CEZ area does not mix geographically. Creative catalysts (institutions or places that show high concentration of creative enterprise activity that is accessible for, or reaching out to, the general public) and creative workspace clusters are located outside, or at the borders, of areas with high deprivation indices (Faraday, Camberwell Green, Peckham and Brunswick Park wards pre-May 2018).

#### **Conclusions:**

The establishment of new creative catalysts and creative workspace offers should be located in areas with higher deprivation to nurture the trickle effect and encourage increased exposure of creative activity to neighbourhoods that traditionally do not engage in creative activity.

### 2.4 Crucial Context for Creative Enterprises in Camberwell & Peckham

As much as creative workspace and a pro-active engagement with diverse demographics in creative enterprise activity is a priority for the proposed Camberwell and Peckham CEZ, this creative cluster relies on a sustainable and strong support framework. Infrastructure, networks, licensing, skills training, housing and shared resources are aspects that require alignment, encouragement and support to create sustainable operating conditions for creative enterprises.

### 2.4.1 Internet Coverage

Creative enterprises thrive on strong, reliable and fast broadband connections. The connection between productivity and broadband speed has been widely established, as has the understanding that pressure on workspace can be buffered by flexible workspace patterns supported by broadband connectivity.

Within the proposed CEZ area, especially in the core town centres, broadband speed is still often below 24Mb/s and prevents creative enterprises relying heavily on this infrastructure to operate and grow.

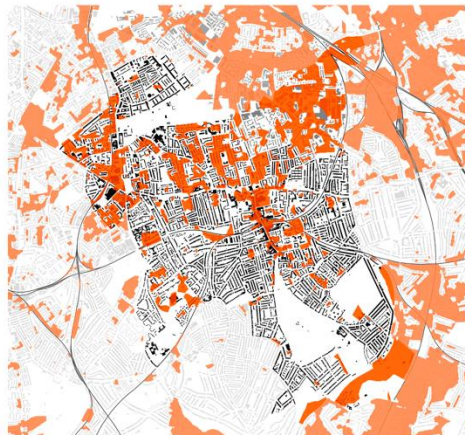
A current, borough-wide strategy to roll out 5G and superfast broadband are in planning.

#### Conclusions:

- The proposed CEZ has the potential and would greatly benefit from being a 5G testbed area.
- The superfast broadband currently rolled out across Southwark Council properties should be aligned with the creative enterprise workspace strategy for the CEZ area.

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'UK Digital Strategy 2017', DCMS, 2017 <<https://www.gov.uk/government/publications/uk-digital-strategy/uk-digital-strategy>> [accessed 11 June 2018] // Bazalgette, ibid.



'IMA Infrastructure Mapping Application for London' <<https://maps.london.gov.uk/ima/>> [accessed 3 June 2018]

### 2.4.2 Infrastructure

Given the high percentage of freelance workers in the proposed CEZ area (see: 2.2.4) connected to creative industries and creative enterprise, the secondary infrastructure supporting the freelance work pattern is crucial. Secondary infrastructure refers to, for example, transport, childcare and education.

Connectivity to other parts of London is a key location driver for the Camberwell and Peckham area which is served well via the Rail, Overground and bus networks.

Childcare facilities, schools and parks are often forgotten, secondary area assets that support freelancing parents. The proposed CEZ area shows a good provision of these

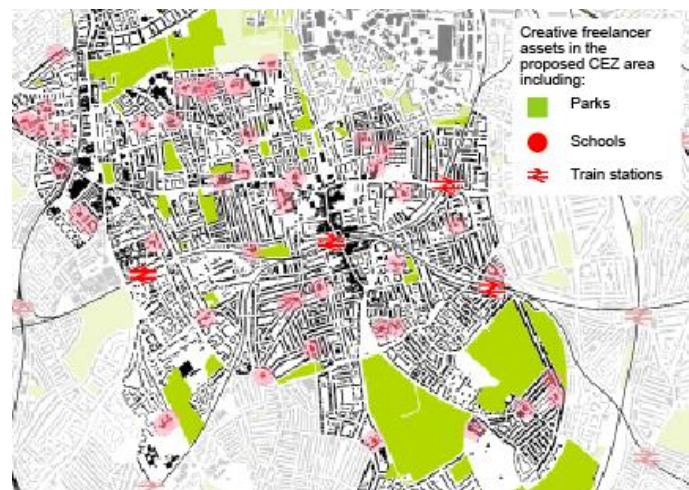
assets with primary (e.g. Belham School) and secondary schools (e.g. The Charter School East Dulwich) being recently developed.

**Conclusions:**

- Camberwell and Peckham key secondary assets to creative enterprises need to be protected, maintained and further developed in-line with existing policy.

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Cauldwell and Easton, *ibid.*



Creative freelancer assets in the proposed CEZ area including: parks, train stations, schools. Southwark Council.

**2.4.3 Licensing & Activity**

Licensed activity, including bars, cafés, restaurants and the night time economy venues are an essential part of creative clusters.

Cafés, bars and restaurants have been identified as quasi-workspace and meeting venues for freelancers - a substantial component of the creative enterprise activity in the proposed CEZ area.

The night time economy has been recognised not only as a powerful, standalone economic driver, but also as a network that is intrinsically linked with other creative enterprises. Prop-making, music creation and hospitality being secondary jobs for freelancers and creatives at the beginning of their careers; all of the above thrives hand-in-hand on a local level with the night time economy (see: Night Time Economy SPD, esp. 2.14 and 6.23, and Sound Diplomacy, 2018).

The Camberwell and Peckham area has recently benefited from a growing, diverse offer of both Food and Beverage (F&B) businesses and music venues. This emergence, however, is haphazard as new licenses are not always easy to obtain (see: Peckham Town Centre Saturation Zone) and operations of night venues have been under threat (see: Chronic Love Foundation (CLF), Peckham).

## Conclusions:

- A clear area-wide strategy to identify opportunity clusters for F&B businesses and night time venues including respective supply chain businesses is needed.

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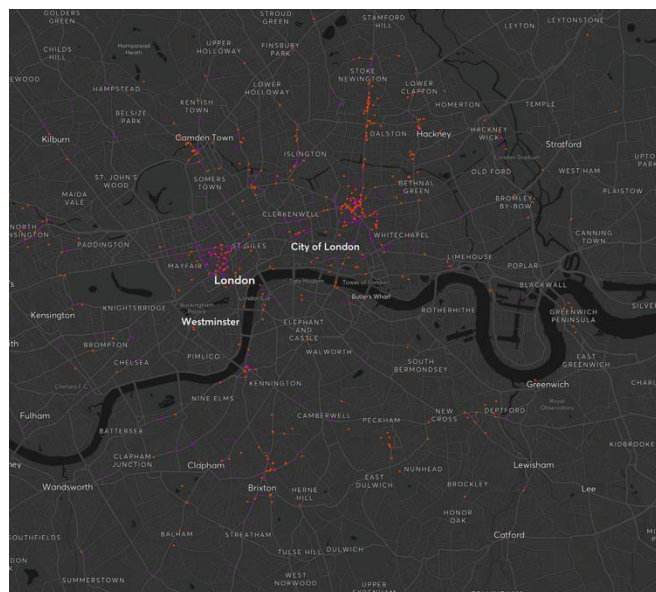
Mayor of London, Culture and the Night Time Economy. Supplementary Planning Guidance (GLA, April 2017)

<[https://www.london.gov.uk/sites/default/files/ntc\\_spg\\_2017\\_a4\\_public\\_consultation\\_report\\_fa\\_0.pdf](https://www.london.gov.uk/sites/default/files/ntc_spg_2017_a4_public_consultation_report_fa_0.pdf)> [accessed 27 May 2018] // 'The Clubbing Map' (NESTA, 2017)

<<https://nestauk.github.io/clubbingmap/>> [accessed 27 May 2018] // 'The London Plan - The Spatial Development Strategy for Greater London - Draft for Public Consultation', *ibid.* // 'The Freelance Revolution: London's Best Places to Work From', HuffPost UK, 2014

<[http://www.huffingtonpost.co.uk/barchick/the-freelance-revolution-\\_b\\_5697933.html](http://www.huffingtonpost.co.uk/barchick/the-freelance-revolution-_b_5697933.html)> [accessed 27 May 2018] // Seijas, Andreina, A Guide to Managing Your Night Time Economy (Sound Diplomacy, June 2018)

<[https://static1.squarespace.com/static/593eb2a837c58172ed556cbb/t/5a7059089140b7ba-d70d8700/1517312288258/663+SOUND+DIPLOMACY+Night+Time+Booklet\\_English\\_V6.pdf](https://static1.squarespace.com/static/593eb2a837c58172ed556cbb/t/5a7059089140b7ba-d70d8700/1517312288258/663+SOUND+DIPLOMACY+Night+Time+Booklet_English_V6.pdf)> [accessed 7 June 2018] // Cauldwell and Easton, *ibid.*



The Clubbing Map', *ibid.* // 'London Music Facilities' (GLA, 2018)

<<https://maps.london.gov.uk/music-facilities/>> [accessed 8 June 2018]

## 2.4.4 Business Rates (Relief)

### Local Context

The CEZ is characterised by micro enterprises who occupy small spaces and so are eligible for some form of small business rates relief.

Only 21% of business premises in the CEZ are liable for full business rates.

It is likely that future re-valuations by the VOA will mean that significantly fewer enterprises are eligible for relief.



VOA re-valuations can also have a significant effect on the viability of town centre uses such as music venues, which are integral to the character of the CEZ but their profitability does not keep pace with local land values

Business rates liability will also be treated as a significant risk by developers and operators of new creative workspace destinations.

Consideration to the risk of future voids and consequential liabilities for creative work, retail and performance space landlords and developers needs to be considered if it is to help deliver the large scale opportunity sites that have been identified within the CEZ.

### Case Study: Waltham Forest Discretionary Relief Policy

- The LB of Waltham Forest have implemented a new category of rate relief targeted at open workspaces which include co-working, incubators and accelerators, as well as workshops and studios with shared common facilities.
- The flexible workspace operator (rather than end user of such spaces) will be liable for business rates and need to pass on the cost to their customers in an all inclusive monthly rent/usage fee.
- Waltham Forest have addressed this issue by making flexible workspaces for small businesses and start-ups, particularly those in the creative industries exempt from paying business rates for the first 12 months and pay much lower rates for a further four years.
- The introduction of this rate relief means more affordable space and makes it much easier for local entrepreneurs, as the workspace operators can pass on the savings to businesses in the form of reduced rent.



79% of all registered business premises in the CEZ are eligible for business rates relief.

Business Rates data do not directly identify creative enterprises, this map gives an accurate baseline reflection of the location and clustering of creative enterprises in the CEZ compared to ONS business census data (which are evenly scattered across the CEZ and largely focused upon residential addresses). Source: Southwark Council Income Team.

### 2.4.5 Last Mile Logistics

Last Mile Logistics are a vital element in creative enterprise clusters to strengthen local supply chains.

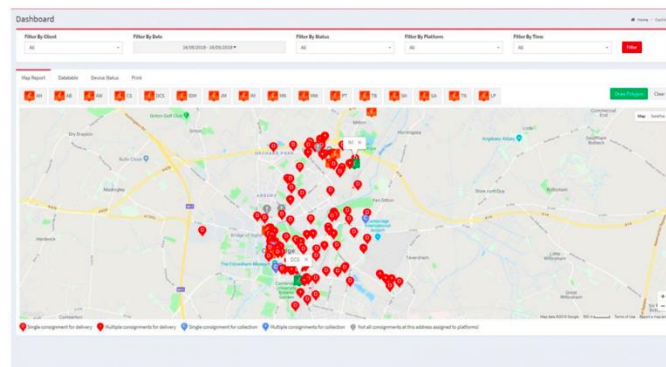
In the Camberwell and Peckham area, deliveries are currently executed by conventional and nationally structured logistics providers, and drop-off centres are haphazardly and inefficiently arranged in local off license shops or nearby cafes, for example, Peckham Refreshment Rooms. There is a clear lack of a comprehensive, local distribution provider that could address specific and local needs to cumulatively reduce the carbon footprint of transportation.

A positive example for such a local, zero-carbon logistics network has been established in Waltham Forest by *Outspoken! Delivery*. This provider caters to intra-area deliveries and also acts as a collector point for UK and international deliveries into the area to local enterprises.

**Conclusions:**

- There is huge potential to actively encourage and facilitate setting up a zero-carbon, local delivery service that caters to the needs of creative enterprises.
- The establishment of such a network can be supported by including adequate space within the planning aspirations for the area.

‘Last Mile Logistics, Courier and Delivery Services’, Outspoken! Delivery  
 <<https://www.outspokendelivery.co.uk/>> [accessed 11 June 2018]



Last Mile Logistics, Courier and Delivery Services’, *ibid.*

**2.4.6 Business Skills Among Creative Enterprises**

From primary research undertaken for this report, it has become evident that creative enterprises in the proposed CEZ area have a situation-driven approach to skills.

With regard to business skills (start-up support, accounting, controlling, management) businesses often do not know where to train or seek support. With regard to industry-specific skills, creative enterprises in the area either work with the skills available in their networks; buy skills in on a project basis; or train on the job.

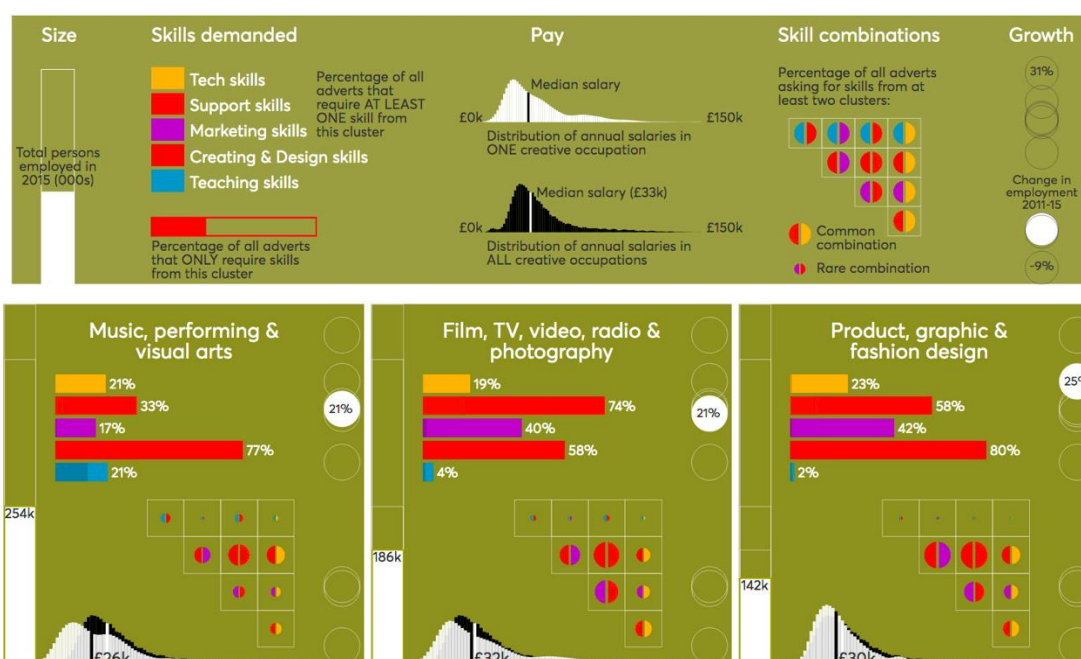
Southwark Council has developed an adult learning programme with excellent premises in Peckham's town centre. The programme, however, does not offer skills training that would address specifically the needs of creative enterprises listed above.

The skills need identified for creative industries by Nesta shows that creative (sub-)sectors increasingly demand not only direct industry skills (e.g. design skills), but also complementary skills (tech., support, marketing, secondary design and teaching skills). Many of these secondary skills are not taught in formal degree education and practitioners and businesses would benefit from formal educational offers within the CEZ area.

### Conclusions:

- Existing education programmes and facilities in the area should identify and offer secondary skills courses that are most needed by the creative enterprises operating in the area.
- Business advice and skills (accounting, legal, financing etc.) could be offered through a central first advice centre and complemented by a professional mentor scheme.

Sleeman, Cath, and George Windsor, 'A Closer Look at Creatives: Using Job Adverts to Identify the Skill Needs of Creative Talent' (Nesta, 2017) <<http://data-viz.nesta.org.uk/creative-skills/index.html>> [accessed 5 June 2018] // 'Southwark Council Adult Learning Service: Course Guide 2017-18' (Southwark Council, 2017)



Excerpt from the summarised findings of Nesta on creative skills demand for the respective creative sectors.

### 2.4.7 Local Supply Chains

Creative clusters do not just create value as an inward-operating network, they contribute to local economic development and productivity. (see: Creative Nation, Fact 6).

Through primary research interviews and surveys this report shows that creative enterprises in the Camberwell and Peckham area have established and rely heavily on locally-based supply chains and networks.

These networks cannot be mapped in their entirety and complexity across all creative practitioners and sub-sectors.

Anecdotal evidence, however, shows that creative practitioners draw on non-creative businesses to efficiently develop their products and services.

A case in point is a local furniture designer based in a railway arch near Peckham Rye station. Both pre-production and post-production around the workshop-based creative activity is supplied by non-creative suppliers within a one-mile radius and includes: a timber supplier; CNC machining; and spray painting services.

This supply chain is also complemented by the services and retail offer of well-stocked shops, for example, Khan's Bargain on Rye Lane, the merchandise of which features in many artworks produced in the Peckham area.

### **Conclusions:**

- As part of a CEZ framework and a consortium of creative practitioners, continuous member-monitoring should be used to establish the resilience of local supply chains.

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Mateos Garcia et al, *ibid*.

### **2.4.8 Measuring Activity & Engagement**

Measuring creative enterprise activity is a complex undertaking and official statistics often only reflect a fraction of the activity in a cluster, for example, they omit the detail of freelancer activity (see: 2.1.1-2.1.3).

Recently, new approaches to measuring the depth, impact and spread of creative enterprises have been developed based on statistical data paired with social media activity. Creative Footprint has measured the music industry: taking into account framework conditions such as, number of venues per resident, content, for example, style of promotion, and space, for example, social engagement. While this approach works for a specific industry within the creative sector, the methods of aggregating, correlating and analysing multiple sources of information are important towards the development of a holistic picture of creative enterprise activity on the ground.

As the proposed CEZ area shows a high percentage of freelance activity that does not show up in official statistics, a reliable continuous measuring framework is necessary.

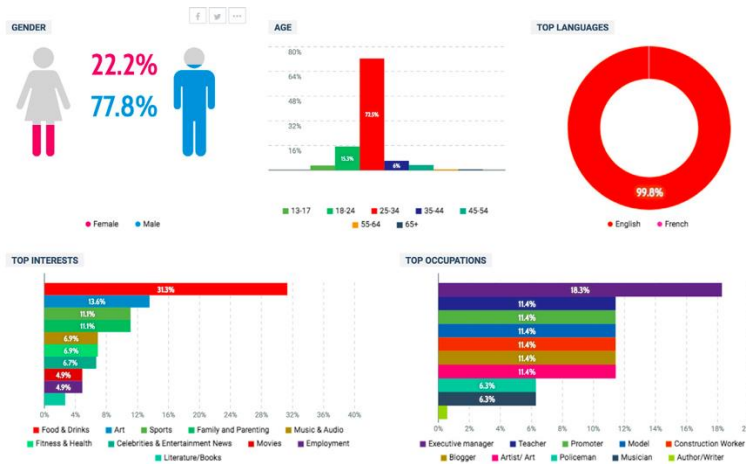
Established businesses and marketing intelligence providers, such as Experian, hold information aggregated from official statistics (see: Companies House, ONS etc.) and online sources, such as social media activity, show business income, background and preferences. While this information is usually used to target audiences and customers, this intelligence can also show creative enterprise activity and engagement with an area.

### **Conclusions:**

- For continuous measurement of creative enterprise activity, engaging a professional marketing intelligence agency to develop a regular, custom designed activity report is needed.



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#### 2.4.9 Lack of a Network & Shared Resources

Creative enterprises benefit from shared resources and formalised networks to reduce production costs; increase operational scope; and share access to vital information, business support and local knowledge.

Shared resources have started to emerge in the proposed CEZ area, for example, print workshops at Peckham Levels; proposed workshops with engagement programmes from UAL: Camberwell. The depth and bandwidth of these resources is, however, limited. Successful examples in other areas of London such as the Blackhorse Workshop, show the sustained benefits of and to creative enterprise activity.

The primary research through the emerging Camberwell and Peckham Consortium has shown that a formalised network is one of the primary needs repeatedly voiced by creative practitioners in the area.

#### Conclusions:

- A formal network for business support and access to vital information and finance should be encouraged.
- Shared workshop and tool resources would support sustainable creative cluster activity.

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The Blackhorse Workshop allows creative practitioners to access machinery, workshops and other facilities, 'Blackhorse Workshop', Blackhorse Workshop <<http://www.blackhorseworkshop.co.uk/>> [accessed 13 June 2018]

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#### Disclaimer

This document is the result of an internal creative process in the summer 2018. The Council's Culture Team together with other departments and Beispiel explored the current state of creative enterprise activity in Camberwell and Peckham and opportunities for strengthening the sector. This work was undertaken as part of the Mayor of London Creative Enterprise Zone competition.

The document should be read as the basis of ongoing work to create a borough-wide Creative Enterprise Zone. Data included may be out of date at this point and should be verified before quotation.

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