Feasibility Study for the Development of Eastside as a Media Quarter

for
Birmingham City Council

Final Report
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Prepared by

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Table of Contents

The Brief

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Olsberg|SPI and DTZ (the "Team"), have been retained by Birmingham City Council ("BCC") to undertake a feasibility study into the development of a media quarter in Birmingham's Eastside (the "Brief").

Eastside encompasses 170 hectares of land, spreading out from the city centre in a triangle, bordered by Digbeth High Street in the South, Corporation Street in the North and Watery Lane in the East. Eastside has been the subject of various waves of change and policy initiatives over the past 20 years. While this has resulted in considerable activity and energy presently in upper Eastside, above the main London rail line, lower Eastside has yet to benefit from significant regeneration and/or commercial investment. The Brief asks for a clear and practicable vision for what an Eastside Media Quarter (the "Media Quarter") might look like and means of achieving this.

In summary, the scope of the Brief requires the Team to:

- develop a strong and clear vision (the "Plan"), purpose and set of values for a Media Quarter,
- define its unique selling points and recommend the strategies that need to be taken to realise this;
- ensure the Plan demonstrates:
    - a commitment to social cohesion and interaction and delivers public value;
    - careful consideration of the history, nature and potential of Birmingham and the Eastside, including existing initiatives and proposals;
- takes on board the views of many stakeholders, and the international context and developments worldwide;
- identify all potential sources of income and investment from the public and private sector, as well as indicating possible synergies and partnerships with other regional and national organisations;
- map proposed and current developments in Eastside and explore how they may be integrated into a Media Quarter;
- indicate the potential economic benefit to be derived from a feasible Media Quarter.

Methodology

The Team used the following methodology to conduct the study:

- an extensive programme of discovery and desk research, including a review of all extant documents, policies and proposals, both current and historical, pertaining to Eastside;
- site visits to Eastside, including the Custard Factory, the Bond, the Arch, Warwick Bar, Curzon Street Station and the environs of all sites;
- consultations with key stakeholders and local and national educational establishments, creative industry practitioners, property developers – a total of 70 consultations have been undertaken;
- a public sector Focus Group event.

What this report does

This report contains the Team's findings and recommendations following this work. It presents a vision for Eastside and sets out a comprehensive raft of recommendations that address the threats to the vision and how it may be realised. It also details a suitable time-scale for the development of a Media Quarter in Eastside.

1. Key Points

Key Points of this report:

The Plan for an Eastside Media Quarter

- Eastside will be a model for the creative, entrepreneurial and sustainable urban environment of 2030 and beyond.
- Embracing the digital age, it will be connected to the rest of the world and reflect the City's unique majority-minority population on global stage.
- It will promote and champion the digital media industries enjoyed by producers, residents and visitors alike as the City benefits from increased economic growth.

The Media Quarter will deliver economic benefits to the City and region

- The economic benefits and social impacts of the Media Quarter will be numerous. Among them will be:
    - Growth of Birmingham's creative industry sector - the Nuclei will contribute to bridging the national average gap by:
        - fostering innovation and creativity, which leads to a more dynamic and economically prosperous sector;
        - supporting the formation of new businesses and entrepreneurs in the creative sectors in a flexible and innovative environment geared to the digital future;
        - realising the potential of all elements of the region's majority-minority community and supporting their integration and entry into the creative industries sector through the provision of training and career development;
        - increasing skills development and graduate retention in the region – the nuclei would link with FE and HE provision in the area and offer enhanced learning experiences through industry contacts;
        - improving the overall efficiency in learning and working practices through digital connectivity connectivity and physical regeneration of the area.
    - Increasing footfall and cultural and business tourism;
    - Enhancing the liveability of the region.

The Media Quarter will deliver on a number of policy agendas

- The Plan has substantial links with public policy agendas locally and nationally – it responds to, amongst others:
    - the AWM Screen, Image & Sound Strategic Business Plan
    - the Creative Cities Plan and the Creative Development Plan for Birmingham
    - the Birmingham Prospectus, BCC
    - the Visioning Study by Prof. Michael Parkinson
- This demonstrates potential support for and investment in the Media Quarter. The City should capitalise on these linkages.

How will the Media Quarter happen?

- The linkages with policy agendas should be capitalised and understood by all.
- The wealth of development activity in Eastside has created an energy which should be harnessed. The various projected and current activities should be drawn together and complemented to form a coherent environment.

- The public sector has a pivotal role to play in funding the development of the Media Quarter, and bringing key partners to the table.

What could go wrong?

- The coherent and organic development of the area risks being inhibited by:
  - incoherent development in Eastside
  - and competing Quarters in the City

What needs to be done?

- The Plan for Eastside should be incorporated into the Masterplan for Birmingham, following the Parkinson report.
- There needs to be joined up thinking and continuity across the City – BCC and AWM important roles to play in 'guiding' development in Eastside and implementing long term, consistent policies
- BCC should use its planning powers strategically to ensure an appropriate mix of development (including mixed-use development) occurs in the area in manner which supports the Plan
- nuclei of activity need to be created to draw the whole Media Quarter together, and attract people into it
- this is where BCC and AWM can make the most impact on the development of a Media Quarter – they will be the principal drivers behind the development of the nuclei
- partnerships will be essential to delivering a successful Media Quarter.

When will all this happen?

- The recommendations should be implemented in three phases.
- Eastside will have several nuclei attractors in 5 years' time
- Strategic planning policy for the Eastside area as a Media Quarter will be incorporated into the next revision of the Local Development Framework, in around 5–7 years time
- Benchmarks for success should be established so that progress can be monitored and successes can be advertised.

2. The Plan

Key Points:

- **The Plan for the Media Quarter is constructed around the following seven key concepts:**

- **Growth -** Eastside will be a model for sustainable growth driven by creativity and innovation, promoting the proliferation of high GVA companies in the heart of the City, specialising in the production and exploitation of media content. Workers, residents and visitors alike will benefit from enhanced economic activity and high profile attractions.

- **Championing the region** – Eastside will celebrate the region's creative industries, and promote the achievements of the region's population and cultural, educational and media practitioners on a national and international scale, increasing the profile of all the sectors represented by the Media Quarter.

- **Connectivity** – Eastside will have a strong international focus, whereby companies and organisations based in the area will have international links. The future's majority-minority population represented by the area will build on its cultural links stretching around the globe.

- **Cultural** – Eastside will showcase all media talent of the region through exhibitions, screenings, installations, public art, and will inspire individuals to be producers as well as consumers of media product.

- **Liveability** – Eastside will be a place where people live in environmentally sustainable and well-designed accommodation. They will be drawn to the area by its quality of place offer and the attractions it offers.

- **Learn** – Eastside will be a centre of learning, home to some of the nation's first class educational establishments that will foster the development of tomorrow's knowledge economy media graduates, boosting the level of highly skilled individuals, and providing them with links to creative industry positions.

- **Work** – Eastside will be the base for a host of innovative and creative SMEs operating within dynamic sectors with high growth potential. High profile organisations will operate out of Eastside, attracting interest, status, and activity to the whole region. The area will retain graduates wishing to work at the cutting edge of the creative industries.

2.1 Overview

Birmingham Eastside's offer will leapfrog other conventional Media Quarters around the world. The overall objective of the Media Quarter will be to **grow** the West Midlands creative industries in such a sustainable manner that delivers economic and social benefits to the entire region.

The Eastside Media Quarter will be the site of the creation and exploitation of media content, acting as a hub of production, consumption and innovation. It will be the model for tomorrow's **work**, **live**, **learn** urban environment, where sustainable, high quality design, innovative use of public spaces, efficient infrastructure will all contribute to an environment where the creative lifestyle of the future can flourish. Eastside's **cultural** offer will be cutting edge, reflecting tomorrow's majority-minority community, so that the diversity of the region's population is represented in the heart of the City. Expertise in communications, cutting edge technology and multicultural links will ensure a level **connectivity** with the nation and the rest of the world. The Eastside Media Quarter will **champion** the region's creative industries and serve to retain graduates within them, promoting the City as a forward-facing competitor in the knowledge economy.

The seven founding concepts (growth, work, live, learn, cultural, connectivity, championing the region) will deliver economic and social benefits to the region. These are described in detail in Section 7 of this report but can be summarised here as:

- Growing the creative industries sector, bridging the gap between the national average;
- Increasing the number of creative industry companies and their productivity;
- Attracting investors and footfall, creating secondary economic benefits in the region;
- Enhancing the liveability of the region;
- Increasing cultural and business tourism, reaping the benefits of both of these;
- Raising the skills level and retaining graduates in the region.

This section articulates in detail the Plan for an Eastside Media Quarter. Careful consideration has been given to the history, nature and potential of the City, Eastside and existing initiatives and proposals. The Team has also taken into account the views of stakeholders, and the international context and development worldwide.

2.2 'Growth'

Eastside will be a model for sustainable growth driven by creativity and innovation, which will:

- encourage and accommodate the formation of new businesses and business models;
- promote the growth of the creative industries
- inspire graduates to remain in the region and seek employment in the West Midlands creative industry sector;
- attract other companies to the region by showcasing the work of the creative industries, and providing a focus for them;
- increase the secondary economic impacts that result from the enhanced desirability of a location, and that contribute to growth of the economy.

More specifically, the Media Quarter will contribute to the growth of:

- the number of jobs available in the creative industries;
- number of companies operating in the creative industries;
- the output of the creative industries of the region
- the profile of the City and thereby the region
- social cohesion, links between communities and thereby the economic and social wellbeing of the region
- competitive edge of the region;
- the profile and contribution of ethnic minority communities;
- access to new markets through the plurality of the Eastside offer.

2.3 'Championing the region'

The Eastside Media Quarter will champion the West Midlands' thriving creative industries and position them at the forefront of an international stage. It will celebrate the diversity of the region's population and culture, and promote the success of its media-related activities in all fields, from education and production to community engagement and artist development.

The successes and outputs of the region's media, arts and cultural sectors will be the defining factor of the Media Quarter – the talent of the region will be intrinsic to the 'Birmingham brand', which the Media Quarter will project to the rest of the nation and the world. It will be this very talent and its achievements that will set Birmingham and the West Midlands apart from other cities and regions.

In the context of a fast-paced global economy, the Media Quarter will play the vital role of being the region's portal to the rest of the world, akin to a 'spokesperson' for the entire region, reflecting its talent and achievements. The Media Quarter will act as a platform on which to showcase the West Midlands creative industries and promote the City as an international epicentre of creativity, innovation and learning.

2.4 'Connectivity'

The Media Quarter will be forward facing, and will embrace the digital future. It will employ the most up-to-date technologies for media production and consumption, and will pioneer digital communication networks which benefit consumers and creative practitioners alike. The expertise of the interactive media companies seated in Eastside will also be represented in the Media Quarter, making it an environment that encourages the engagement with those within it.

The companies and cultural institutions located in the Media Quarter will have a strong outward-looking focus, characterised by their meaningful national and international outlook and business partnerships. Meanwhile, the courses offered in Upper Eastside will attract students from around the world to Eastside. The Media Quarter will therefore have business, cultural and educational links on a global scale.

Eastside will be a place of social cohesion, where the diversity of the region's population is represented. Programmes and activities will bring people from all ethnicities and social backgrounds together, and seek to bring value to 'hard to reach' communities. Birmingham is one of the most ethnically diverse cities in the UK – Eastside will be a place for these to interact and mingle with each other, either in public or work spaces. Through this inclusion, potential trade links will be opened up with the countries of origin of the region's majority-minority population.

Efficient and well-designed infrastructure will connect Eastside to the rest of the City and region and build on the City's existing rail and air networks. The area will link seamlessly to the City centre via pedestrian and cyclist-friendly roads and walkways, while practical public transport networks will open up the area to the surrounding suburbs and districts. Space within the Media Quarter itself will be enhanced by intelligent spatial design that encourages the free flow of people around the area and into the area.

The Media Quarter's multi-layered connectivity will make it a highly desirable location to a variety of different people - companies will want to locate there, young people will want to study there, individuals will want to live there and creative practitioners will want to work and exhibit there.

2.4 'Cultural'

Eastside's cultural offer will be cutting edge and will attract visitors and practitioners from all over the world. State of the art showcasing techniques will bring a vast range of media and arts products to audiences in an array of different spaces and locations across the area. Of primary importance will be showing the work of local and regional artists and providing them with a space to reach audiences.

Alternative cinema be within easy reach of the City centre, potentially widening its audience base and diversifying the usual blockbuster' choice offered by conventional screens. Through its provision of art house cinema screens, the Media Quarter will show independent UK and international films, documentaries and programmes. These screens will provide local directors with a much-needed platform to profile their work.

An important aspect of the Media Quarter will be its non-brand-led approach to entertainment, leisure and retail. Independent cafes and restaurants will locate in Eastside, as will 'non-chain' boutiques and individualistic retail outlets. The current City centre model for leisure revolves around shopping (the Bullring) and drinking (Broad Street). Eastside will act as a counterpoint to these cornerstones by fostering a more authentic ambience and flourishing niche establishments, and celebrating 'non-mainstream' leisure and retail outlets.

2.5 'Liveability'

As advances in digital technology free individuals from being tied to a specific location, live, work and socialising spaces will increasingly converge, leaving individuals free to live and work anywhere. In this digital future, quality of place becomes paramount when choosing a location to base in. Eastside's liveability will be enhanced by the presence of cultural attractions and innovative companies located there.

The heritage of Eastside will make the area highly desirable. The residents of Eastside will enjoy an environment designed on the basis of principles of environmental sustainability and pioneering design. Eastside already boasts impressive Victorian façades and factories – these handsome historical buildings will be retained and refurbished, so as to preserve the striking appearance of the architecture. Sophisticated residential accommodation will be stylishly integrated into the landscape of the area denoted by the striking façades of some of the 19th Century factory buildings that give Eastside its gritty, modern character. Other existing attractive features such as canals and footpaths will be create a special sense of place, whilst also acting as essential parts of the infrastructure of the area.

All the requirements of the creative lifestyle will be met within the Media Quarter, with a mixture of night and day time leisure offerings and cultural experiences at hand in Eastside. This leisure offer will distinguish Eastside from the rest of the City, as it will be based on the work on independent providers and practitioners.

2.6 'Learn'

Eastside will be a centre for learning, offering students some of the most new and innovative HE and FE courses in a range of media and performing arts in the country. Building on the existing provision of the Matthew Boulton College and Aston University, the University of Central England ("UCE") will be relocating its media and arts faculties to the upper Eastside, bringing with them 600 students. The DfES-backed Creative Arts and Digital Media Academy ("CADMA") will provide a mixture of courses ranging from digital media to theatre and dance to young people aged between 14 and 19 years old. These will complement the resources and courses offered by UCE and others[1] at Millenium Point, such as Sonic Arts and Aural Technologies.

Eastside may also build on the HE provision by accommodating high technology research and innovation centres in media related fields such as the Sonic technology and Digital Imaging sub-sectors. These would feed into the courses being offered by the various educational institutions and contribute to graduate retention.

The learning experience of all the students in Eastside will be enriched by the links their courses make with professionals based in the Media Quarter and beyond. This contact with the creative industries will equip students with the tools, training and insight they need to thrive in the knowledge economy of tomorrow.

The institutions based in the Eastside will build a reputation for Birmingham as the epicentre of 21st Century learning. The Media Quarter will attract people from around the world wishing to take part in the most innovative media-related courses, will offer them links with successful creative industry businesses, and will provide the possibility of graduate employment in the area. The Media Quarter will be home to at least one 'centre of excellence'. This will increase the number of highly skilled individuals in the region, pioneer innovative ways of learning, and help to create links between education and industry.

2.7 'Work'

The Eastside Media Quarter will be a hub of activity for innovative creative industry SMEs operating in the most dynamic and high-growth potential sectors. Companies wishing to locate in Birmingham will look first to Eastside for the sort of affordable, flexible facilities required by creative businesses. Building on the current activity located at the Custard Factory, the Bond and the Arch, there will be provision of small and larger spaces for companies to grow into, so that the area as a whole will be home to media companies of various sizes. These will be operational in a number of media sub-sectors, ranging from audiovisual production to interactive design and web services.

High profile organisations will operate out of Eastside, attracting interest, status, and activity to the whole region. The Team believes that it would be highly desirable for the flagship public sector organisations associated with audiovisual media to be located in Eastside. In the same way as Film London's presence in the newly converted Tea Building in London's Shoreditch signifies the agency's engagement with the vanguard of UK filmmaking, the presence of Screen West Midlands and the Birmingham Film Office in Eastside would signal the ethos of the agencies and their mandate to

1 Millennium Point houses the following: UCE department TIC; Birmingham Interaction; Matthew Boulton College; Thinktank; IMAX; Marketing Birmingham; and the Young People's Parliament.

promote and engage with digital content producers across the region. It would also exemplify the City's commitment to the Plan.

Students in upper Eastside will get first hand industry experience through the links between the companies and educational establishments in the area, while the concentration of companies operating in a number of different media and digital content creation fields will contribute to retaining graduates in the region.

Eastside will symbolise the production power and talent of the City's and the region's SMEs, in the same way as the nearby Bullring symbolises the City's retail power. As the principal site of media production and consumption for the region it will be internationally recognised as the nerve centre of the region's creative industry sector.

3. How Will it Happen and What Might go Wrong?

Key Points:

- **The realisation of the Plan will happen:**
    - **by realising the opportunity that Eastside currently offers;**
    - **by pre-empting the risks that may affect the development of an Eastside Media Quarter;**
    - **with careful guidance from the public sector;**
    - **organically and over time – strategic planning and commitment is needed.**

3.1 By linking with public policy agendas

The public policy agendas of AWM and BCC both seek to make the region fit for the knowledge economy. AWM seeks to make the West Midlands the 'leading region for integrated innovative creative digital content, contributing to the region's exploitation of integrated digital technologies for innovative education and entertainment content-creation'[2]. Meanwhile, digital media is widely recognised by AWM as a driver of economic activity - the Screen Image and Sound Cluster ("SIS") places emphasis on the creation and exploitation of digital content. As such, it constitutes one of the five themes of focus for the Innovation and Technology Council, the body which guides AWM priorities and investment in innovation.

From BCC's perspective, an Eastside Media Quarter would be in line with the image of a 'creative cluster' set out in the 2002 Creative Cities policy document[3], and would fit in directly with the recommendations put forward more recently in the Birmingham Prospectus[4]. The later identifies key actions to take forward the overarching strategy for the City, described in the Community Strategy - Taking Birmingham Forward, with the objective of increasing its global competitiveness and make it a 'dynamic regional capital and generator for growth and prosperity' – objectives which the Media Quarter share. The Plan responds to the five themes identified by the prospectus by seeking to:

- make Birmingham a truly global city that recognises the pace of change in the world economy;
- attract investment to make Eastside the natural choice in quality of life decisions;
- link the region to the rest of the world;
- increase the region's competitiveness and share the prosperity this generates with its people;
- provide excellent services that will attract people and encourage them to stay in the region.

Furthermore, the Media Quarter responds to most of the recommended actions detailed in the Prospectus. It would

- diversify and strengthen the breadth of independent retailers in the City and provide start-up premises;

2 *Screen Image Sound 3 Year Strategic Business Plan 2003-08*, AWM, 2003
3 *Creative Cities Plan* (2002) later developed into the Creative Development Plan for Birmingham (2003), both BCC
4 *The Birmingham Prospectus*, Birmingham City Council, November 2006

- be the site of at least one centre of excellence in key growth sectors;
- improve the quality of public space provision in the City;
- be a place where property assets would be used in an innovative manner to deliver regeneration;
- be the locale for a holistic approach to education that integrates industry experience into the fabric of learning provision, with a view to ensuring that Birmingham capitalises on the knowledge economy.

Lastly, Professor Michael Parkinson's 'Visioning Study[5] highlights the City's potential for developing its knowledge based economy. Parkinson's comments about the City include the indication that it needs more diversity to balance the emphasis on large brands and points to the necessity of recognising "the ever-increasing pace of change in a world economy". Furthermore, The study highlights the opportunity for Eastside to have a different type of urban environment characterised by grit and authenticity. These observations will be part of the message upon which the 'City Masterplan' is built. The Plan for Eastside set out in this document corresponds to Parkinson's ethos, and as such links to the Masterplan currently being elaborated for the City.

The public sector agendas and direction explained above demonstrate that there would be widespread support for a Media Quarter that has linkages with them. As work begins on the Masterplan, the time is now right to capitalise on these potential linkages and embed the Plan for an Eastside Media Quarter in policy documents.

3.2 By linking with existing and projected developments

Eastside is emerging from a period of inactivity – the political winds of change have settled, and the McDermo factory exclusion zone that prevented development for an extended period of time has been resolved[6]. With these impediments to progress removed, the area is once again the site of much activity and promise. There is the opportunity to build on this momentum and to link with existing and projected developments in Eastside - now is the opportune time to do so.

The new momentum is evident in the wealth of development activity taking place across Eastside in three broad categories which are in line with the Plan for a Media Quarter:

- **Workspace for creative SMEs:**
  - Existing hubs of creative activity such as the Bond, the Arch and the Custard Factory are all set for expansion in lower Eastside. As these grow, they will provide additional office space for creative SMEs, as well as larger size 'grow-on' space for flourishing companies.
  - Whilst the activity of these hubs has been sizeable, it has remained, until now, relatively introspective and inward-looking. The development of new workspaces provides the opportunity to build on existing activity and take it beyond the existing confines.
  - Creative SMEs will also benefit from the provision of office space in mixed-use development such as Ventureast in upper Eastside.

- **Regional educational establishments are locating media and technology-related courses in upper Eastside:**
  - In a £100 million re-structuring operation, UCE plans to move its entire arts and media provision to Eastside, drawing together faculties, currently sprawled around the City, into one place, helping to define Eastside as a top-level place of learning and innovation.

5 *The Birmingham City Centre Masterplan: The Visioning Study*; Professor Michael Parkinson; BCC, February 2007

6 There remain some concerns about building residential or office space around the Gun Barrel Proof House.

Between four and five faculties will be relocated, including the Birmingham Conservatoire, the Birmingham Institute of Art and Design, as well as a range of interactive media provisions such as Screen Media Lab. All together, this relocation will see the arrival of 10,000 students into Upper Eastside. UCE will also be working with Arts Council West Midlands to deliver flexible exhibition and workshop space through a collaborative strategic project called ARTicle. A postgraduate Centre for Media based in Eastside is at the concept stage.

- This will complement the existing educational establishments newly built in upper Eastside, such as South Birmingham College, Matthew Boulton College (completed in 2006), Aston University and the New Technology Institute, and expanded facilities for Aston Business School and the Academy of Life Sciences, as well as the learning and facilities offered by Millennium Point.
- Ventureast forms part of a £57.3 million joint venture between BCC and AWM, and is intended as a technology led scheme with an extension of Aston Science Park and offices for SMEs. The 6.25 hectares site will house a 1 million sq ft high quality sustainable mixed-use scheme which it is hoped will boost the regeneration of Eastside and will anchor the 'Learning and Leisure Quarter' and the proposed City Park.
- These large scale developments have attracted national interest – the DfES will back the Creative Digital and Performing Arts Academy to be located in the Learning Quarter. This will offer young people in the West Midlands courses in digital media, visual arts and design, technical theatre production, theatre, music, musical theatre and dance, with a-particular emphasis on creative media production. The school will admit approximately 1,000 students aged between 14 and 19 years old.

- **Mixed-use work/live property is being developed with a strong emphasis on sustainable communities and preserving the architectural strong points of the area:**
  - Planning and outline consent was granted to Birmingham Alliance in late 2006 for the building of a 2.2 million sq ft mixed-use space named Martineau Galleries. Plans currently stand for 915,000 sq ft of retail, 250,000 sq ft of office space, 100,000 sq ft of leisure and up to half a million sq ft of residential space (up to 834 apartments), although these figures are subject to change. The landscape will also include airy, open streets and squares, public spaces and public art, and a combination of national and international retailers and caterers, bringing evening activity into the area.. The entire project is worth £650 million and completion is expected 2012 at the earliest.
  - The redevelopment of the Grade C locally listed former Typhoo Tea factory building was granted planning permission in 2005. It will involve the conversion of 300 one and two bedroom apartments, and will include new build units on an adjacent site. Part of the project covers the re-opening of the canal arms, the creation of a public square and a series of courtyard spaces, providing efficient circulation[7].
  - The Warwick Bar area falls in conservation area and includes sites of historical importance, such as the junction of two canals and two listed buildings (the Banana Warehouse and the impressive Fellows Morton & Clayton brick warehouse). The site is to be transformed into a mixed-use space – initial indications are that the breakdown will be 60% residential 40% commercial. There have also been early-stage discussions for the space to include elements of the proposal for a 'Film Centre', as well as a meeting room and cafes. This also shows the support and backing media and cultural proposals for Eastside have met with. Warwick Bar

7 Glenn Howells Architects created these designs for the developer J.Gallagher. However, the land has since been sold on to other developers. These designs should be effectuated, unless the new developers seek to change the planning permission.

is intended to be one of the first low carbon schemes in Birmingham, in response to ISIS' Sustainability Charter and should incorporate principles of sustainability and sound design.

- A possible total of 100 live spaces have been planned for the former UB40 recording studios. Plans for this site also include a possible music college and new recording studios.
- The Irish Quarter will also be the site of substantial mixed-use developments. Planning permission was recently granted for a £400 million development that will provide an innovative approach to live/work space. Buildings will contain living accommodation and an equal amount of offices in a managed workspace situation. This development will bring affordable accommodation to the heart of the City, on or around Moseley Road and Cheapside.
- There is a large amount of land which has not been appropriated as yet and which remains an unrealised opportunity to develop the area. This is the land belonging to Gooch Estates and accounts for approximately 56,500 sq metres[8].

Other significant developments include Curzon Gate, which will bring a number of students into the area, and the City Park, which will serve to link Upper and Middle Eastside[9]. It should be noted that a number of media-related proposals, at various stages of evolution, have been put forward at the time of writing. These are discussed in more detail in Section 5 of this report.

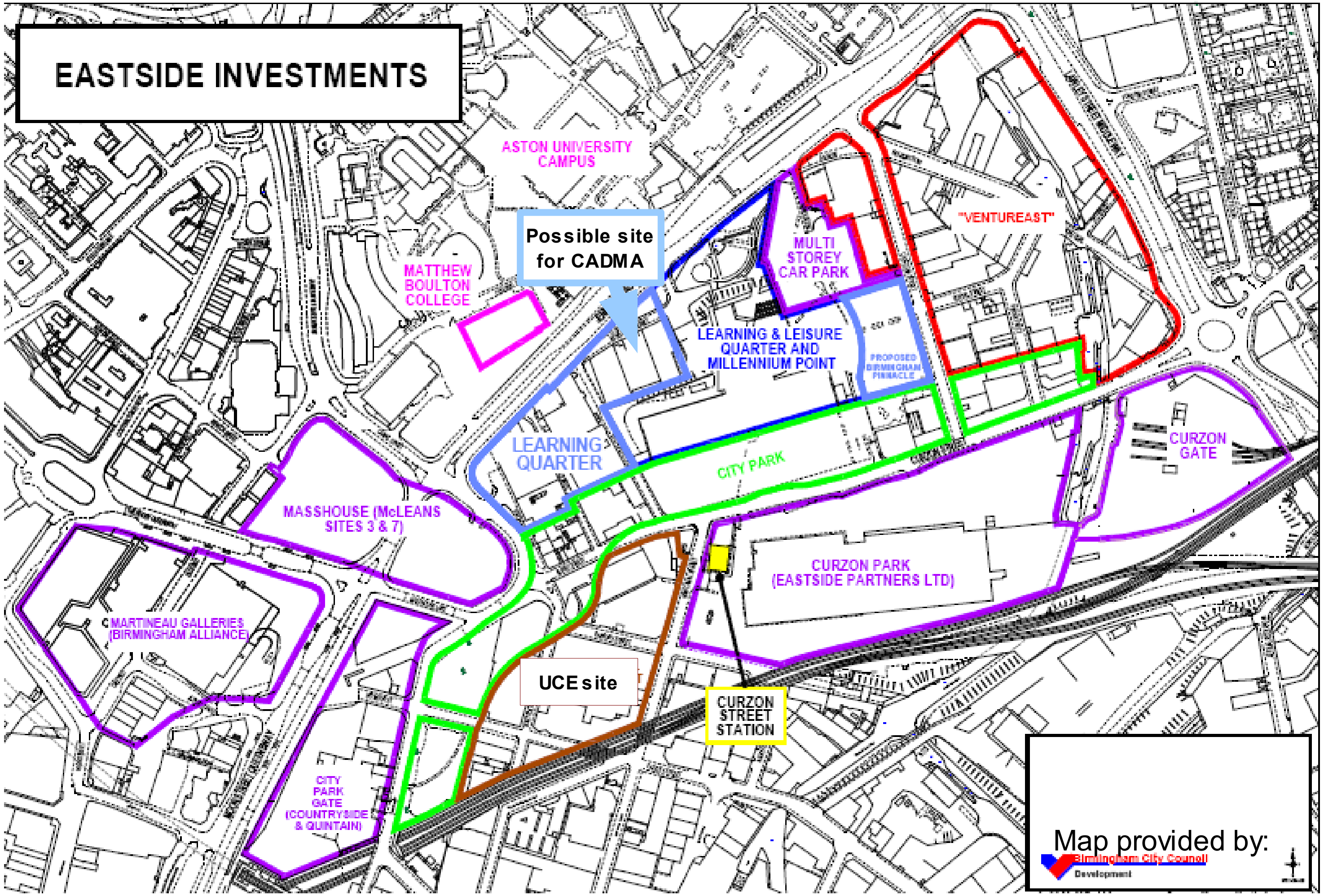
These developments correspond to elements of the Plan for Eastside as described in Section 2, and as such represent steps in the right direction to its realisation. It is a therefore a strategically apt time to capitalise on the activity in the area. However, it should be recognised that an ancillary aim should also be to create a cohesive environment in which all strands of development activity are drawn together. To achieve this cohesion, the current obstacles to development of a cohesive environment must be overcome. There remains much to be done to unite what is currently a fragmented landscape. The obstacle to movement presented by the railway line poses a significant challenge and while the pockets of current development activity in the area have created considerable energy, they do not link to each other.

Another key issue will be that of focus - Upper Eastside is underway and attention should be turned to further south – this is where the Eastside opportunity lies. The following two maps plot development activity across the area. As can be seen from Map 1, Upper Eastside is saturated with projected and existing development activity, while Lower Eastside presents lower saturation of development and pockets of space for potential future development. Furthermore, the type of development in each section is different in broad terms, Upper Eastside being home to large-scale, more corporate projects, while Lower Eastside accommodates smaller-scale, creative industry development. The Media Quarter should work towards allowing dissimilar types of development to thrive.

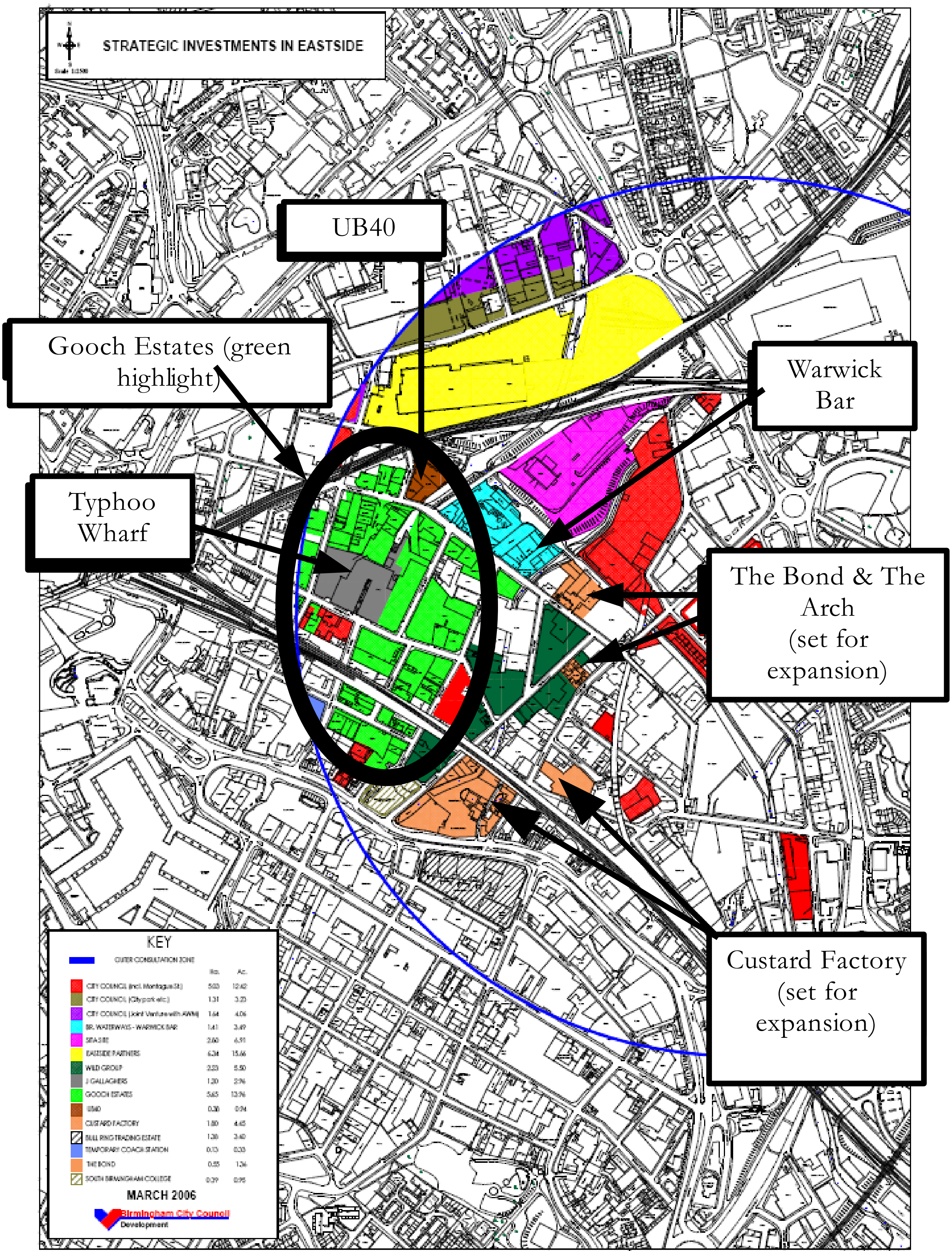
8 Eastside Team, Birmingham City Council, March 2006

9 More detail on these is provided in Appendix 3 of this report.

Map 1: Development in Upper Eastside, above the railway line
Source: Eastside Team, Birmingham City Council.



Map 2: Development in Middle and Lower Eastside.
Source: Map supplied by Eastside Team, Birmingham City Council.



Map supplied by: Eastside Team, Birmingham City Council

3.3 By capitalising on Eastside's existing strengths and distinctiveness

Eastside has a heritage that make it unique. Several locally and statutorily listed buildings are located in Eastside. The area features key historic sites including Typhoo Basin, Curzon Street Station and the Campanile Monastery[10], while the newer Custard Factory occupies the site of the original settlement of Birmingham. Its industrial past is witnessed in number of buildings that have a dramatic and striking quality which could be capitalised upon and used to attract visitors.

These strong features are recognised by English Heritage, which is committed to ensuring that "key urban development and regeneration proposals, for example, the Birmingham Eastside scheme, are able to maximise the potential of the historic environment". Eastside has a history and aspect that sets it apart from other places in Birmingham -.this should be celebrated.

3.4 With the help of strategic public sector guidance

Market forces alone will not lead to the realisation of the Plan. Lessons learnt from examining the development of creative quarters, such as Sheffield's Cultural Industries Quarter, demonstrate that the presence of a coherent raft of public sector support measures are key to ensuring successful development of Media Quarters – this should be noted and accepted. There is evidence of a certain drive behind various projects in the area now that some of the barriers to development have been removed. This energy should be channelled, managed and guided appropriately to create the Media Quarter Birmingham is capable of having.

A vital factor in developing the Eastside Media Quarter will be the careful guidance on the part of public sector organisations. AWM, including the EBNS Regeneration Zone, and BCC will be the cornerstones of this development. As the most powerful and far reaching public sector bodies, they have the responsibility and capacity to see through the long-term process of creating the Media Quarter.

Widespread stakeholder sign-on will be paramount to the sustainability of the Media Quarter. Drawing on their combined ability and experience in forging partnerships, AWM and BCC will need to create the necessary links with partner organisations that would have an interest in the Eastside Media Quarter in order to deliver the ambitions of the Plan.

The time is right for the public and private sector to decide on the long term future of Eastside and build on the current positive, forward facing energy that characterises today's developments in the area. It is the opportune moment to harness this energy in a set of coherent strategies designed to realise the Plan and promote the organic growth of a Media Quarter in Eastside.

3.5 What Could go Wrong?

3.5.1 Not getting the right mix of developments

Eastside is the site of much planned and current activity. While this has created a welcome momentum, there is the risk that if allowed to continue completely unmanaged, further developments in the area

10 *Eastside Heritage Trail, Curzon Street to Deritend*, BCC / Marketing Birmingham

would lead to an incoherent environment that lacks the varied development essential to the creation of a Media Quarter.

As Section 3.2 of this report illustrates, the Learning and Leisure Quarter is progressing, while Upper Eastside is also home to a number of large-scale developments with uses set to range from educational to residential and offices. Meanwhile, mixed-use development is planned at Warwick Bar, plans for the transformation of Typhoo Basin into large-scale residential development have been approved, while the Custard Factory is expanding its provision of office space for SMEs in Lower Eastside.

There is speculation that the land values in area are already beginning to increase as the high profile developments of Upper Eastside progress – a growth demand for residential space within the area, together with a rise in land values increases the desire of developers for residential developments, since these are the most lucrative. If, indeed, land values escalated, BCC would find itself under pressure to allow greater returns by accepting residential planning applications.

In order for a Media Quarter to exist, there needs to be an appropriate mix of types of development. Furthermore, it is important that mixed-use development are supported, as these are part of the Plan for Eastside and the lifestyle it seeks to promote. The difference in scale and nature of development which is already emerging between Upper and Lower Eastside and which present a range in scale, price and use should be supported. A balanced strategy that fosters organic growth is essential. Without a coherent strategy, the public value agenda that is core to the Plan will not be met. Eastside would have little to distinguish it from other Quarters and would not fulfil its potential to be the cultural and economic counterpoint to the rest of the City.

3.5.2 Unhealthy competition between the City's Quarters may weaken the message

The Team is aware of six 'quarters' in Birmingham: the Jewellery Quarter (“JQ”), the Irish Quarter, the Balti Quarter, the Chinese Quarter, the Gay Village and the Learning and Leisure Quarter[11]. The Renaissance Charter drawn up for JQ sets forth a vision for the quarter as 'the City Region's Creative Village', the principles of which are based on providing an environment for creative businesses, characterised by quality buildings and places, improved infrastructure and public realm and sustainability. Furthermore, JQ already houses many high profile creative businesses, to the extent that there is, amongst some, the perception that it already constitutes a Media Quarter.

Whilst the Plan presents a more comprehensive and far-reaching outline for the development of Eastside than is represented by the JQ Renaissance Charter, there is obvious overlap between the ambitions of a potential Media Quarter in the East of the City and those of JQ, and this could be a source of competition within the City.

Eastside's brand will be diluted if it is entirely replicated, and development of its Media Quarter will suffer a lack of focus, which eventually will be detrimental to the success of its ambitions. It will therefore be necessary to distinguish between the two, for example, JQ could be seen as 'craft-based', with innovation, digital media and the knowledge economy as the focus for development in Eastside. In short, it is counter-productive and waste of energy to have Media Quarters in the same city competing for scarce regional resources and national attention.

11 (Parkinson, February 2007)

Whilst the creation of the City Centre Team should draw the management of each Quarter under one team within BCC, there is no indication as to how to the timescale for this shift. Furthermore, the City is divided between several AWM regeneration zones and clusters, which also presents potential for overlap and duplication of efforts.

4. What Needs to be Done to Realise the Plan?

Key recommendations:

- **The Plan needs widespread buy-in from public and private sectors, and the public, in order to be realised.**
- **It should be acknowledged that the Plan is a long term one and the development of a Media Quarter will require a sustained strategy and a high level of commitment from all stakeholders.**
- **The Team has developed robust, practical and implementable set of recommendations. These are designed to ensure that the Plan is realised and that a Media Quarter that fulfils the ambitions of the City and region is developed in an organic and sustainable fashion.**
- **The recommendations are elaborated in this section and are summarised as:**
  - **Across the City there should be joined up thinking, collaboration and continuity of policy direction.**
  - **BCC should use its planning 'power' strategically to guide development in Eastside.**
  - **The public realm of Eastside and its surrounding areas should be improved.**
  - **Eastside needs nuclei of activity.**

4.1 There should to be joined up thinking and continuity across the City

4.1.1 The Plan should be incorporated into the City centre Masterplan

Given the scale of the project and the number of organisations that will eventually be involved, 'joined-up thinking' across the City is necessary. To ensure that this is achieved, the Plan should be enshrined in the City Masterplan that is currently being drawn up. This will ensure that the brief for Eastside is communicated, understood and taken forward as pat of the larger remit of addressing the City as a whole. Any development in Eastside should be part of far reaching BCC and AWM strategies – cohesive decision making is needed to avoid instituting initiatives which are at cross purposes – inclusion in the Masterplan can steer and encapsulate this process.

All organisations should be 'singing from the same hymn sheet' – this means the Plan should be reflected in all policy documents, and there should be consensus as to how to achieve it. The 'roadmap' for the development should be agreed upon and understood by all.

4.1.2 The Eastside Media Quarter should be promoted consistently

All public sector organisations involved in attracting inward investment to the region and City should promote Eastside and the Media Quarter consistently. A clear list of benefits therefore needs to be drawn up, so that bodies such as Locate Birmingham and Marketing Birmingham spread the same message. This message should be encapsulated in a Media Quarter brand. This will:

- ensure unity of purpose when communicating the benefits and 'selling' the Eastside to potential investors, nationally and internationally.
- Communicate the ethos and thinking behind the development of the Media Quarter, and translate this to residents of Birmingham, and visitors to the West Midlands.
- Establish the list of benefits that Eastside offers, so that they may easily disseminated.

4.1.3 Eastside needs unwavering commitment, continuity of leadership, long term funding streams

To realise the Plan, a substantial and unwavering commitment will be required from all organisations involved in Eastside and beyond. Public sector bodies, private sector companies all stakeholders and the public will all need to sign on to the Plan, and get behind the long term effort to make it a reality.

It should be acknowledged that this document sets out a Plan for the long term future of Eastside. Continuity of leadership is needed to carry it through all its stages. This is an important point in relation to funding initiatives, upon which an equally long term mentality should be brought to bear in order that funding streams do not dry up for successful projects that do important work in the area. Furthermore, the City's commitment should override changes in the political landscape, so that shifts in governance do not de-stabilise the progress made towards realising the Eastside Media Quarter.

4.2 BCC should use its planning 'power' strategically

4.2.1 BCC should ensure an appropriate mix of development in Eastside to support the Media Quarter

As the local planning authority, BCC is responsible for controlling development within Eastside. Since much of the existing land and premises within Eastside, as an industrial area, have historically been designated for employment use (whether as business premises (B1), industrial premises (B2) or warehousing (B8)), then any new residential or retail developments within the area will need permission for a change of use.

By using this power strategically, BCC can guide development in Eastside to ensure that it is in line with the Plan. For example, by only granting residential consent if this forms part of an appropriate mixed-use development, this create the type of environment that will support the Media Quarter whilst realising development values that will encourage private investment in the area.

The overall environment and character of the area should also be preserved using the planning powers enshrined within the Conservation Area, of which Eastside is part.

4.2.2 Work should begin on formulating Strategic Planning Guidance for Eastside for incorporation into the LDF

In order for a coherent framework to exist in Eastside, BCC should enshrine the Plan in the next revision of LDF, which is likely to occur in 5–7 years time. This would entrench Eastside's position as the Media Quarter for the region and guide development along principles of environmentally sustainability that can benefit the City's residents and the ambience of Eastside. In order to realise this requires the due statutory process to be followed, which includes requirements for public consultation on the proposed framework. As such, the framework will need to be something that all stakeholders, including developers, landowners, and public sector bodies with interests in the area can support.

The Media Quarter Plan will form the evidence base and foundation for any planning guidance and this should be discussed with BCC's planning department with a view to developing this guidance and taking it through the relevant procedures.

The guidance thus developed can then be adopted within the Local Development Framework ("LDF"), thereby guiding all future development in the area. This would exemplify the City's long-term commitment to the Plan.

This strategic use of BCC planning powers would bring cohesion to the development of Eastside and the growth of a Media Quarter in a transparent manner that was clear to all developers and landowners with interests in the area.

4.3 The public realm should be improved

Eastside has to be more than somewhere people go for a particular purpose and then leave. It has to attract and retain people in the area. For this, access to Eastside from all areas of the region, be it nearby Attwood Green and the City centre or other places in the region, will be key, as will improvements to the public realm that will make people feel more comfortable about spending time in the area. Improvements need to be made on a number of levels:

- Decent street lighting needs to be put in place across the entire Eastside. As night falls, the area becomes deserted. Functioning, bright street lighting would bring a feeling of safety to the area.
- Traffic plans should be altered – the wide noisy, busy roads that cut up Eastside should be narrowed and traffic slowed, with pedestrian crossings placed at strategic points. Pedestrian and cyclist traffic should be facilitated by the provision of pedestrian footpaths and cycle lanes linking the area to the City centre and neighbouring districts.
- Eastside should be served by more than one bus route – it should have a number of bus stops located around the entire area. Just as the Parkinson Report recommends there should be through routes from across the City centre, bus routes should travel through Eastside as well as to it – the area should be connected to the region and communities to the east, west, north and south of it, via public transport links.
- The logistics of moving to, from and around Eastside need to be made easier by the provision of signposts and direction markers. People need to be informed as to how to move from one place to another.
- Eastside needs public spaces of varying sizes. Much can be achieved with the thoughtful placing of benches, green lawns, small public squares, which can act as pockets of air in an urban environment. The public spaces should be designed and positioned to complement the

tendencies of pedestrian traffic and they should work in harmony with the City Park (once realised) and surrounding buildings. Eastside also has a canal network, which provides unique opportunities for picturesque public spaces.

- Public spaces also provide the opportunity for displaying public art, hosting free exhibitions or events, and the intermingling of different people in the area by providing a space to sit, pass through or spend one's leisure time.
- The opportunity that is Digbeth High Street must be realised. It has the potential to be transformed from its 'motorway-like' current appearance into a grand, processional boulevard, fringed with trees and flowers, leading proudly to the City centre. It should also be the connecting factor between Eastside and the neighbouring Irish Quarter. Independent, non-franchise, quirky shops, cafés, and restaurants should spread across both sides of the boulevard. Visitors will be enticed into discovering more of these outlets in side streets leading off the main road. A certain amount of traffic is to be anticipated on this major route in and out of the City centre – alternative traffic solutions should be considered, as the current appearance of the road is not positive for Eastside.
- The River Rea crosses Digbeth High Street – ways of drawing attention and celebrating this natural feature should be explored as it has the potential to be a scenic attraction.

The changes that need to take place are substantive, far reaching and ambitious – they need to be to grow the sector in such a way that it meets the national average, and to deliver the other extensive economic impacts associated with graduate retention, increased skills levels and enhanced liveability of an area. The nature of this work means it does not rely on one agency alone. Some of the pubic realm alterations, such as the infrastructure issues, involve other parts of the City. There will therefore have to be a process of negotiation and discussion between all the relevant organisations that can perform and fund these sorts of changes. This will take time and co-ordination. The agency best placed to begin this process is BCC.

The Parkinson Report calls on the City to initiate the citywide debate that will lead to the necessary public realm improvements being made. The Team hopes the suggested changes for Eastside are effectuated as part of the wider plan for the whole of the City centre that arises from this debate. Improvements to the public realm are key to facilitating more people coming to the area – only once these changes have been made can the rest of the development of Eastside take place.

4.4. Eastside needs nuclei of activity

4.4.1 Establish 'attractors'

The Team recommends establishing centres of activity in Eastside. These centres will provide focus for the region's creative industries, their output and their talent. It is apt that these centres have 'media' or the creative industries as an overarching context as it is well documented that the creative industries are a driver of regeneration in urban environments. They will also provide a reason for people to go into Eastside and move around it. This movement will be part of creating a sense and quality of place that is essential to generating economic benefits and establishing a coherent and accessible environment.

Centres of activity such as the Team propose have the potential to embrace all the agendas set forth in the Plan for Eastside. This recommendation provides a holistic approach to delivering on the ambition of the seven key concepts that underpin the Plan. The centres will:

- ***Be a place for artists to live and grow their work***
  - the centres will provide a range of programmes designed to foster artistic excellence. By offering 'artist in residence' programmes in a variety of disciplines, practitioners from around the region and the world will come to Eastside for sustained periods of time to explore and further their talent, grow their business skills and make contact with others in the field.
  - ***Associated economic impact:*** fostering innovation and creativity leads to a more dynamic sector.

- ***Champion the region***
  - by being a platform on which the creative output can be projected to the outside world;
  - by exhibiting all forms of creative output of the region;
  - by drawing in creatives and other professionals from the region to contribute to learning; and skills focussed programmes run by the centres;
  - by contributing to the skills development of young people
  - ***Associated economic impact:*** attracting businesses, residents, visitors and investment to the area.

- ***Be connected and connect Eastside***
  - each centre will be connected virtually to the rest of the world in terms technology, partnerships and business links;
  - centres will have international links as a result of the diverse communities they will attract, who themselves will be producing and consuming media product;
  - centres will have mandates to be socially inclusive, to embrace the region's diversity through the multicultural nature of all programmes run;
  - centres will connect with artists and media practitioners across the region, and will encourage them to network and connect with each other;
  - each centre will reflect the international agenda of the Plan through the people it welcomes through its doors, by the links it will have agencies across the world and the nature of the work done and displayed in each centre.
  - ***Associated economic impact*:** increased efficiency in learning and working practices, enhanced competitive position by being physically and virtually permeable.

- ***Provide a cultural offer***
  - via exhibitions, displays, events and performances, visitors to Eastside will engage with the creative output of the City and the region;
  - the media output on offer at the centres will reflect the various cultures that make up the West Midlands, and engage people from all backgrounds as producers and consumers of creative content.
  - the proliferation of media literacy and appreciation of all cultures, European and non-European, will inform the programming of all centres.
  - ***Associated economic impact:*** the level of production and consumption of cultural product is an indicator of the strength of the creative industries.

- ***Be a place to learn***
  - the centres will link with and complement the courses offered by the educational establishments in upper Eastside such as the Music Conservatoire, UCE's BIAD, and activities taking place at Millennium Point;
  - the centres will also provide links between education and industry through programmes offered;

  - the type of learning that takes place there will be of the kind that equips young people to take their place in the knowledge economy, and that enriches people of all ages and backgrounds through the diversity of its provision.
  - ***Associated economic impact:*** increased graduate retention and skills development.

- ***Be a place that fosters the work of SMEs and other organisations***
  - centres will all include workspace for various kinds of media-related companies. The Media Quarter would also provide the perfect home for media-related agencies such as Screen West Midlands, the Birmingham Film Office, the National Centre for Open Source.
  - ***Associated economic impact:*** growth of the sector, contributing to overall competitiveness in the knowledge economy.

These top level provisions and programmes will make the nuclei of activity 'attractors' that draw people to Eastside, distinguish the Media Quarter from the rest of the City and anchor the principles of diversity, multiculturalism, social cohesion, innovation and learning for tomorrow's knowledge economy, at the very heart of the City. While other Media Quarters are built on the principle that fostering the growth of SMEs in incubator-style premises will lead to economic benefit, the Eastside Media Quarter would be constructed upon other principles – that the fostering of socially beneficial activity contributes to the wellbeing of society and thus influences in a positive manner the economy at large.

4.4.2 Events across the Centres and Eastside

The Media Quarter and the three Centres would offer the perfect environment for multi-event seasons or festivals. Birmingham is already the site of many media-related events, such as Fierce and SuperSonic, which attract local and international crowds. The Centres would provide the opportunity to spread these events across the Eastside, by locating elements of them in each of the Centres. In addition, the Digital Film Events, once conceived and finalised, will be unique to Birmingham. This multi-event season in particular will require several venues – Eastside provides the most suitable environment to host the pioneering events.

5. Options for the Eastside Nuclei of Activity

Key points:

- **The Team proposes three options for the nuclei of activity:**
  - Option 1 – three centres
  - Option 2 – Hub and Satellites model
  - Option 3 – One Multi-purpose Centre

- **Three themes should anchor the Media Quarter and provide the basis for the programming of the nuclei of activity:**
  - Centre for Digital Vision
  - Centre for Sound
  - Centre for Youth

5.1 Overview

The Team has elaborated three options for the nuclei of activity in Eastside and recommends that the nuclei be anchored to three 'themes'. Although approximate capital costs and sustainability assessments have been provided, only a feasibility stage can provide concrete figures on which to base a full evaluation.

The Team recommends that a decision be taken on which option to pursue. This could be followed by a call for proposals for the realisation of the chosen option. The rest of this section could act as source material for a brief for this tender process, which would be designed to draw out the most imaginative solutions for Eastside.

5.2 Using themes that have resonance to anchor the Media Quarter

5.2.1 Three themes

On the basis of extensive research and a thorough and in-depth consultation process, the Team has identified three themes which have particular resonance with Birmingham and the West Midlands. The themes are:

- film and the visual arts;
- music and the sonic arts[12];
- youth.

These concepts should be used to anchor the Media Quarter and provide additional focus for the centres, as they celebrate the strengths of the region and also have the most potential to link with organisations, educational establishments, public bodies, private companies. Interactive media and diversity will pervade all aspects of their programming and provision. The media activity that takes

12 Sonic arts can be described as the meeting of music, technology and art. The term sonic art is used to encompass the creation of digital programmes used to create performance based products.

place in Eastside should be focused on these themes, and as such the nuclei of activity should reflect these in their programming, output and activities.

These themes have been chosen because they:
- have the potential to trigger the most economic activity and revenue streams;
- link to existing and proposed strategies across the City;
- have the potential to involve partners from the public and private sector.

5.2.2 Pertinence of three themes

Digital Vision
The production of creative digital content is flourishing in a number of sub-sectors throughout the West Midlands. The profile of film in Birmingham is rising steadily with the backing of a number of film-related organisations. The region has the third highest number of employees working in broadcast television outside London.

There are a number of digital and moving image related strategies, both current and under discussion, in Birmingham – such as the Technology and Innovation Centre and the Digital Event and Festival Showcase. The region is also home to some of the nation's most successful computer games companies. It is also a hotbed for innovation in the emerging Serious Games sector. This demonstrates that this theme is clearly important in a media and cultural context.

Artist-orientated organisations such as Rhubarb Rhubarb VIVID are already pioneering for the sort of mentoring of local talent and international focus that the Plan for Eastside calls for, however, creatives from all content and visual media disciplines from the City's varied ethnic communities lack a significant space to showcase work. The theme of digital vision would support the work of these organisations and place work artists' at the heart of the city, where it can be accessed and appreciated by all.

Sound
Birmingham is a centre of innovative music and has been recognised as such on a global scale – the city was named one of the world's five music 'hotspots' by Billboard magazine in 2007[13]. Capitalising on this theme will provide the diverse music genres produced in the region, such as Bhangra and Raga, the opportunity to be showcased in one area. In three years time, Eastside will be the location for 600 music students as a result of the relocation of the Conservatoire and music courses being brought to the UCE developments in the area. Sonic Arts and Aural Technology are already being offered as Higher Education courses. There is the opportunity to profile this and the extant wealth of music activity across Birmingham by focusing on the theme of music and the sonic arts in Eastside.

Youth
Birmingham has a young population with almost 20 per cent aged between 16 and 24 years. Over 60 per cent of the population is under 44 years old. The City is therefore an interesting and vital test bed for emerging mass market products and emerging niche markets eg: BME and youth markets.

The West Midlands is home to nine universities and an HE and FE student population of over 169,000. In addition to the existing provision of the Matthew Boulton College and Aston University, the University of Central England ("UCE") will be relocating its media and arts faculties to the upper

13 Other cities named were Brisbane, Beijing, Berlin and Marseilles.

Eastside, bringing with them 600 students. The DfES-backed Creative Arts and Digital Media Academy ("CADMA") will provide a mixture of courses ranging from digital media to theatre and dance to young people aged between 14 and 19 years old. These will complement the courses offered at Millenium Point, such as Sonic Arts and Aural Technologies. There is the opportunity to capitalise on and work in partnership with these institutions to complement their work by providing students with the opportunity to experience the creative industries at first hand, thus increasing their skills level and ability to enter this high-growth sector.
There are also activities in Eastside and wider national political and social agendas that link to this theme and would offer funding and partnership opportunities. These are described in some detail in Section 6.2.1 of this report.

5.2.3 Interactivity and Digital

Innovations in digital technology impact on the creation, production, distribution and consumption of media content. That the population of the UK becomes familiar with digital technology has become a matter of priority for today's governments. The facility to understand, partake and operate within tomorrow's knowledge economy, for which digital technology is a major driver, is of the utmost importance to all individuals, and is a matter of survival for most economies.

New and emerging digital technologies have had tremendous impact on all elements of the media sector and media consumers, whether it is in the field of the visual arts, audiovisual production, music or film. What emerges from this finding is the fact that any sustainable and long term Media Quarter has to embrace 'digital', otherwise it would be redundant in tomorrow's world. This proposition for a Media Quarter therefore has digital and interactive technologies and practices at its heart. This is why 'interactive media' should cut across all centres.

Indigenous activity in this area already exists in Eastside and interactive media is a strong feature of the region as a whole. The Custard Factory houses number of companies whose primary activity is focused on second-generation web based communities and hosted services (web 2.0), creating portals for user-generated content, web optimisation or 'seo'[14] and developing interactive content for a variety of platforms. The West Midlands is home to high profile games companies, while five universities across the region (Warwick, Staffordshire, Birmingham, Wolverhampton and Coventry) produce a steady flow of games graduates. In addition, Coventry's recently established Serious Games institute is a new initiative designed to transfer the ideas, skills, technologies and techniques used in commercial entertainment games to local SMEs[15].

Audiences are increasingly demanding and expect to access content on a variety of platforms, to take part in self-guided research, to experience multi-layered presentation. All three Centres will have to do more than take this into consideration in their programming – they should be epicentres of innovation in digital and interactive media, capable of anticipating a rapidly changing multi media context - this should be reflected in their output, their exhibition technology and curation, the subject matter they deal with, their delivery of interactive participatory frameworks and their choice of partnerships and collaborators. Visitors will expect to engage and interact with what they see at the Centres online, through portable mobile devices, and on demand. Interactive media companies based at the Centres should be involved in the process and delivery of interactive solutions across the Media Quarter, not just at the Centres but across all initiatives such as public art displays and events located in Eastside.

14 Search engine optimization (SEO) is the process of improving the volume and quality of traffic to a web site from search engines via "natural" ("organic" or "algorithmic") search results

15 http://www.coventry.ac.uk/newthinking/html/serious.htm

The interactive aspect of the Media Quarter will be key to generating economic impacts – it mean that Eastside is virtually permeable, and can be accessed and understood from around the world. This will attract investors, business and visitors.

5.2.4 Diversity

Championing the region's diversity would demonstrate a commitment to the 'integration' of its various communities. Birmingham will be the UK's first 'majority minority' city – it needs its ethnically diverse population to be represented in across the city through a variety of events, activities and themes. Looking outwards, to the countries linked to the region's ethnic population, there is also the notion that 'new' mass markets such as Bollywood films, black publishing, urban music etc, have not always been well exploited – these would be targets for Eastside activity.

All three centres should work on partnerships with community representation organisations to ensure that the Media Quarter is as ethnically diverse as the region. Exhibition programmes should adopt a flexible and pragmatic approach to guarantee a responsive policy that has buy-in from all communities. All Centres will have a mandate to promote the greater inclusion of BMEs in the participation and delivery of their programming, and to support their entry into creative industries and their access to high level employment. The Youth Centre in particular will focus on creating industry links and enhancing media business and entrepreneurial skills in young people, with a view to increasing the number of BME-owned media businesses in the region. This is a necessary step to the greater integration of people from all ethnicities and background in the media sector, as the Mayor's Commission on the Creative Industries has noted: “Employment under-representation of BMEs reflects the general problem that people like to work with people they know – it’s how many people get their first jobs in an industry. If diversity is really to be increased then what is really needed is BME owned businesses and BME access to power and decision-making in the creative industries”[16].

5.3 Option 1: Three Centres

5.3.1 Overview

Option 1 involves the creation of three centres, each on capitalising on the region's media offer by being focused on one of the themes mentioned above. The three centres would be:

- Centre for Digital Vision – focus on Film and Visual Arts
- Centre for Sound – focus on Music and the Sonic Arts
- Centre for Youth – focus on young people's learning and experience

5.3.2 A National Centre based in Eastside

Music/Sonic Arts and Youth have the potential to deliver an asset to the region in the form of a national centre that would place it firmly on a national and international stage. The Team therefore recommends that in addition to the centres of excellence in education, such as CADMA, Eastside should also be the home of a 'National Centre for Youth' or a 'National Centre for Sound'.

16 Creative London, Seminar paper on *Fostering Diversity to Breed Success*, 2003

Youth

The most obvious benefit of a National Centre for Youth is that it would be the only one of its kind in the UK, and possibly in Europe. With this uniqueness comes status, and the image of Eastside as a place where innovative thinking is welcome, pioneering work in the realm of social cohesion is done and the value of fostering happy, enriching, diverse experiences for young people is understood.

There is scope to build on the work currently being done by the Young People's Parliament (YPP) and the University of the First Age (UFA), both of which are currently based in the Millennium Point. The National Centre for Youth would provide a dedicated space for both these UK-wide organisations to extend their facilities and the scale of their initiatives. It may be the that the Centre becomes the seat of the Young People's National Parliament, while UFA's various strands of activity, such as Summer Challenges, Super Learning Days, and Young People Leadership, could be broadened to reach out to more communities across the nation. All these programmes would also benefit from the proximity of industry contacts. Being located in the Media Quarter would enrich and enliven the valuable work being undertaken by the UFA and YPP.

Such a centre would also capitalise on the ongoing shift in focus of national policy to address social cohesion and youth issues. More specifically, it would link with the UK-wide policy initiative 'Youth Matters' as described previously. The Youth Opportunities Fund and the Youth Capital Funds are just two of the initiatives Youth Matters aims to deliver. These funds aim to empower young people and give them more choice and influence over provision and facilities[17]. Under the 'Things to do, places to go' initiative and the Education and Inspections Act 2006, local authorities have a duty to secure access for young people in their area to sufficient positive leisure-time activities. These duties include requirements to:

- secure access to sufficient youth work activities;
- ascertain young people's views on positive activities;
- publicise positive activities;
- consider alternative providers of positive activities or services to enable young people to access activities[18].

A National Centre for Youth would allow the City and the region to meet these requirements and leapfrog other regions in doing so.

Sound

A National Centre for Music and the Sonic Arts would provide the profile and focus that this particular sub-sector needs. With no equivalent of the public sector screen and film agencies, the sector is disadvantaged in terms of funding and political influence. Although the City hosts many different music-related activities ranging from festivals to education, not enough is being made of the potential of this sector and the local and regional industry needs a range of industry-driven production and marketing resources. The UK is the world's second largest producer of music after the USA with almost 10% of sales – this is considerable given the context that the music industry is worth $130 billion. As key consumer benefit of broadband according to all major providers[19], music is an increasingly important economic driver in the digital era. A national Centre champions this sector would offer the potential to link with the relocated UCE Music Conservatoire, the Sonic Arts innovation and learning taking place in Millenium Point, as well as the CAMDA courses soon to arrive in upper Eastside.

17 Section 6.2.1 of this report gives more information about how this UK-wide initiative has the potential to fund the creation of the Youth Centre proposed for Eastside.
18 http://www.everychildmatters.gov.uk/youthmatters/thingstodo/
19 www.ifpi.org

The sector also offers valuable cultural and social benefits. Music is pervasive – it reaches everyone, regardless of age, ethnicity and background. It is one of the most effective ways to engage with the most disaffected young people. It is inter-generational like no other art form. Its popularity and proliferation is evidenced through the global value of the industry and the amount of activity that surrounds it. Music and the Sonic Arts offers the region the potential to connect internationally with Birmingham's twin city, Chicago, which also hosts pioneering events in this field, such as the 'Third Coast International Audio Festival' ("TCIAF"). More needs to be made of the potential of the industry in view of its undeniable relevance to all communities and ages.

Either of these would be a point of focus for the nation's activities, companies, organisations and pioneering thought associated with these themes. Eastside would then be the logical choice for headquarters of any UK agency operating in these fields. The internationally recognisable status in either Youth or Music and Sonic Arts would give the Media Quarter another distinguishing feature to set it apart from other core cities and promote the image of the Media Quarter being a place where innovative thought and initiatives are fostered and brought to life. High profile status also has the added benefits of attracting a greater number of investors and partners.

The Team acknowledges that the proposals for this option is ambitious and that it needs to be in order to accommodate all aspects of the Plan and plans for a Centre of national status.

5.3.3 Programming of the Centre for Digital Vision and the Centre for Sound

Between them, the Centres would champion all aspects of film and the moving image, visual and creative arts, music and sonic arts of the region. They would achieve this through their planning and editorial content, through their provision of workspace for creative SMEs as well as services and initiatives designed to support and engage creatives, artists and the diverse community of the region. These are indications only and further detail would be provided during the course of a feasibility stage.

The exhibition programme: would consist of the exposition of projects, presentations, commissions and initiatives produced and conceived by a team of experienced curators and organisers attached to the Centre. Artists working in film, video, sound, new and emerging media forms as well as traditional visual art forms, based around the region and the country, would showcase their work at the Centre in the form of film screenings, audiovisual, visual art, audio installations, exhibitions, music performance and audio installations. Creative SMEs based in Eastside would be showcased in the Centres so that Eastside would reflect the media produced there.

The Centres would accommodate a variety of technical requirements, offering both fixed and flexible facilities. The Digital Vision Centre would provide digital projection facilities for screenings to large and small audiences. It would have a remit to showcase local media and film product, but also to bring alternative film to Birmingham, as a counterpoint to the blockbuster City centre offer. The Digital Vision Centre would therefore be a key provider of a different film experience in the City centre, and play a vital role in bringing regional talent to its screens in the heart of the City.

The Sound Centre would an equally important role in showcasing Birmingham and regional talent in the music field. Its showcasing events would profile the work of students of the Conservatoire and Sonic Arts courses in upper Eastside as well as practising artists and researchers in these fields. This activity is important to encouraging a greater understanding and appreciation of the breadth of the Music sector.

Programmes of artist support and community engagement would involve the provision of artists' facilities and spaces for the wider community to engage in a variety of activities. Spaces would be available to practitioners for production activities, and may involve the provision of production equipment, building on and possibly incorporating the AWM Digital Central programme. A programme of collaborative activities would provide a framework between artists and community groups to engage as participants and producers of moving image and digital art forms, discovering self expression and collective learning, to produce works of valuable self expression and social benefit. Both Centres will thus provide the means and framework for individual self-empowerment and facilitate the local, regional, international recognition of the region's talent and communities.

Artists in Residence schemes would be offered by both institutions. These could take a number of forms, and there are many examples of similar successful schemes to draw on. The principle aim of the Centre's schemes would be to advance the contemporary practice of artists, producers, directors, curators, and educators, and would seek to advance work that has the potential to engage with the diverse community and audiences on a regional, national and international level. The schemes would attract artists practising in the visual arts, digital and technological arts, filmmakers, musicians and sound designers. Again, the Eastside location of the Centres should be capitalised, as these schemes should provide contact with industry professionals located in the area, engaging them as tutors and mentors. There is also the potential for a strand focused on learners – the CADMA may offer Artist in Residence posts based at one or more of the Centres in association with dedicated trusts such as the Leverhulme Trust, which aims support 'the residency of an artist of any kind, or nationality, in an institution in order to foster a creative collaboration between the artist and the staff and/or students of that institution.

SMEs would be based in offices located at each Centre. Office spaces would be occupied by creative SMEs operating in the audiovisual, interactive, digital, music and sound sectors. Major public bodies associated with these sectors would also be encouraged to locate there. The presence of Screen West Midlands, the National Open Source Centre, Music West Midlands etc. would send out the message that Eastside is the recognised hub of media activity for the region.

Social and networking spaces, with cafes, bars and restaurants offering round the clock facility access. All those accessing the Centres would intermingle in independently run outlets catering to all manner of tastes.

5.3.4 Programming of the Youth Centre

Young people represent the largest group of consumers of media in the world and as such are a huge audience and potential producers of the future. As has been mentioned previously, there is tremendous scope to develop and further the provision of youth-focused services that is currently being delivered by the City and region. The government's Youth Matters agenda and the potential to work within it has already been understood by some Birmingham-based organisations and programmes, such as First Light Movies and the University of the First Age. The Youth Centre would provide a context and opportunity to expand on these and reach out to the region and nation as a whole.

The importance of media literacy in the context of fostering skills that enable individuals to become employed in the 'knowledge economy' is increasingly being acknowledged. As more research is undertaken in this area, it is also becoming apparent that different social groups may have very different orientations to the media, and develop different kinds of literacy that reflect this. Media literacy involves a range of responses not simply a cognitive process. The programming of the Youth Centre would endeavour to provide young people with a range of activities and events conceived with an innovative approach, pioneering thought, inspiring direction and non-patronising integrity. These would deliver on policy agendas and link with the activities and courses provided by the educational institutions soon to be based in upper Eastside. The Media Quarter would bring a considerable young presence to the City centre, whilst reflecting to the world the talent and product of the diverse youth community it works with.

Overall, the Youth Centre would be contributing the fostering innovation and creativity amongst the young population of the region. It will increase the skills levels from an early age, empowering individuals with the tools to enter the creative industries and compete in the knowledge economy.

The Youth Centre would be different from the Digital Vision Centre and the Sound Centre because its facilities, programmes and management would be entirely geared to young people who would visit the Centre either as individuals or as part of school groups. Strands of programming would largely be based on those of the Digital Vision Centre and the Sound centre and leisure and office spaces would also be incorporated appropriately in the building.

Exhibition space / Performance spaces would showcase the work of the region's youth in all creative media fields. The Centre would have a mandate to showcase schools from the entire region, increasing awareness and inclusivity. A media exchange programme with the twinned city of Chicago might offer the opportunity to broaden the remit of this strand and extend the horizon of young people on either side of the Atlantic.

Activity space / teaching programmes would be industry-focused. They would involve the residency of media practitioners, artists and creators in a cross-section of media fields, based in Eastside and further afield. These people would engage with entire classes on a project-by-project level. The educational provision of upper Eastside is entirely FE and HE focused. While the Youth Centre would link with courses being offered at these institutions, and provide complementary programmes, its provision would be focused on 11 to 18 year olds. Some of the facilities located at the centre would accommodate whole classes or groups of classes, either running in conjunction with schools or providing add-on facilities.

A primary purpose of the Youth Centre is to bring young people into the City centre who otherwise may not visit it. The Media Quarter will have a role to play in creating a bridge with young people from disaffected and isolated communities by being a place where they can engage in creative self expression and definition in an innovative and aspirational learning context that embraces the digital future they will be part of. The Youth Centre will provide activities aimed at increasing business and entrepreneurial skills amongst some of the region's most hard-to-reach communities, so as to encourage a culture of business ownership and enterprise that is crucial to a greater ratio of ethnic minority proportion in the media industry.

5.3.5 Location of the Centres

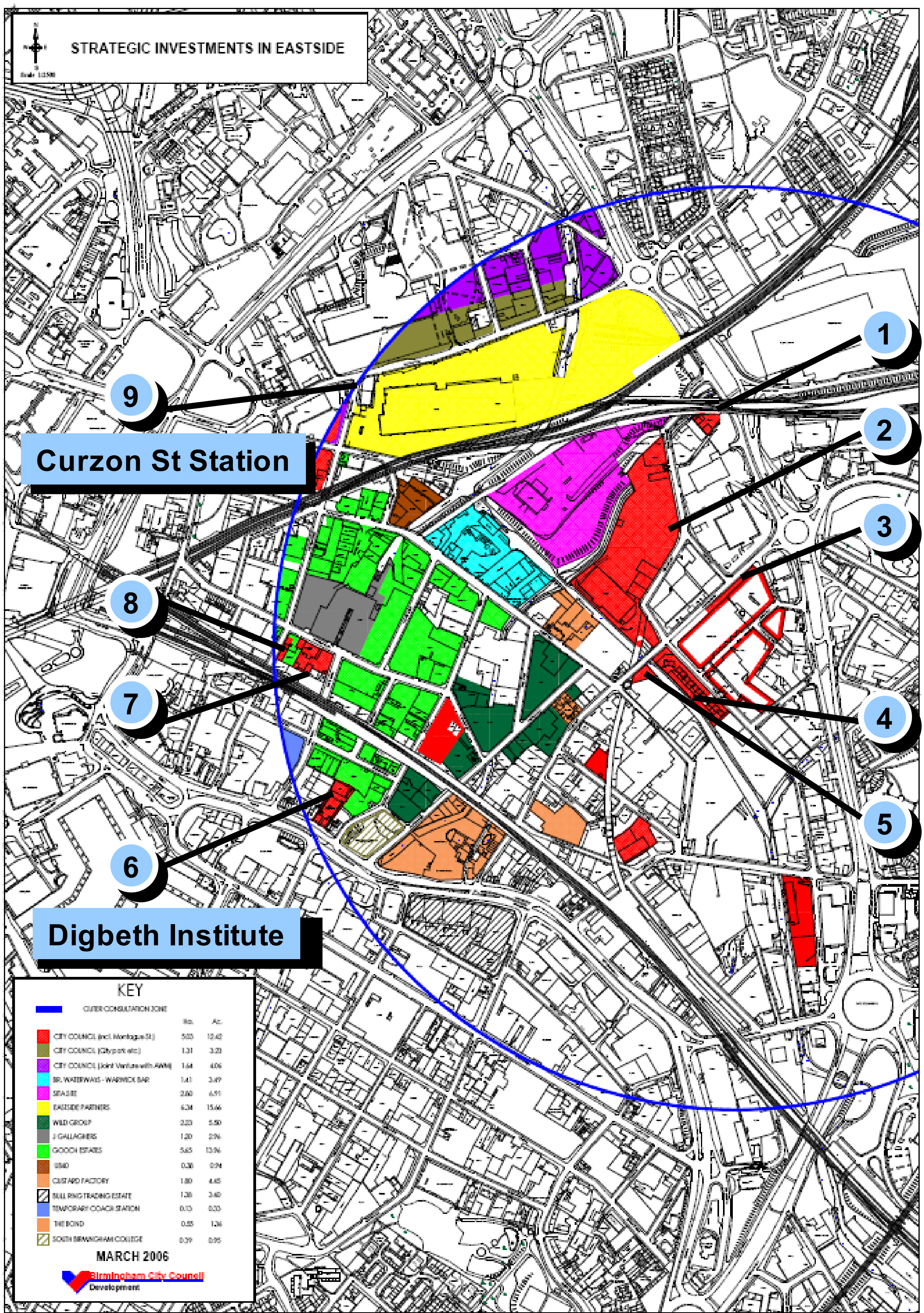
The three Centres have a combined surface area exceeding 3,300 sq ft, so that collectively the Centres could represent considerable amounts of activity. As has been mentioned before, Eastside needs nuclei of activity to draw people into the area and retain them there. It also needs to shed its current fragmented nature. The location of the Centres is key to this. The geographical location of the Centres will be of strategic importance to weaving together the variety of activity in the Media Quarter. The Team therefore envisages that the Centres be placed in triangular formation so that visitors will be encouraged to discover different parts of the area depending on which Centre they visit, their footfall naturally creating a coherent and connected environment.

The Team has ascertained that there is a total of nine BCC-owned sites of varying sizes but collectively representing 50,300 sq. ft[20], illustrated on Map 3. The Team believes that these could accommodate the Centres. It would be a matter of priority that BCC secure the required land in order to assure that development can proceed.

Site 7, located at the Corner of Bordesley St and Oxford St; includes 'Ladbrooke House' and is behind Typhoo Basin. There would be the potential to use this site for development of one of the options. It should also be noted that there would be potential to develop one of the Centres in Upper Eastside. Although all plots of land are allocated, there some do not yet have allocated use. AWM is also in possession of 1.5 acre site to the West of Millennium Point – it currently in discussions with an interested party regarding development of this site, however, there is the chance that the site may be liberated if the party does not allocate a use for the site.

20 Excluding Curzon Street Station building

Map 3: BCC land ownership across Middle and Lower Eastside
Source: Eastside Team, BCC, March 2006.



Source: Eastside Team, Birmingham City Council

Legend for Map 3 – Locations for sites 1 to 9	
1	'Belmont Passage', next to the railway line, along the Rea river
2	On the Canal, Montague St – this is the largest single site
3	Along Great Barr St, backing on to Mc Dermo
4	Along the Grand Union Canal, backing on to Glover St
5	Near site 4, on Heath Mill Lane
6	'Digbeth Institute' on Digbeth High St
7	Corner of Bordesley St and Oxford St; site includes 'Ladbrooke House' and is behind Typhoo Basin There would be the potential to use this site for development of one of the options.
8	Meriden St and railway
9	On New Canal St, at crossroads with Banbury St

5.3.6 Capital costs of three Centres

Approximate capital costs for the creation of the Centres suggested as Option 1 have been calculated for their development as new build and as conversions. The square footage and capital costs are based on the initial specification for each Centre as outlined above. It should be noted that the numbers provided are broad indications of cost. A thorough specification would have to be created as part of a feasibility stage in order for more accurate numbers and costs to be provided. The summary table illustrates the outcomes of these calculations, details of which are provided in Appendix 1 of this report.

Option 1 – Three Centres	**Size (sq.m)**	**Capital Costs (£m)**	
		New Build	**Conversion**
Digital Vision Centre	1963	3.1	2.4
Sound Centre	1775	3.0	2.1
Youth Centre	1425	2.4	1.7
Grand Total	**5163**	**8.5**	**6.2**

5.4 Option 2: Hub and satellites

5.4.1 Description and programming

Option 2 would consist of the creation of one centre, the Hub, and several smaller centres, the Satellites, around it. The hub and satellites would be anchored around the three 'core' themes described under Option 1. Again, interactive and diversity themes would cut across all programming and editorial content.

Programming offered by the hub and satellites would deliver all the elements of Option 1. The audiovisual, sound, and youth strands would demand the same level of technical and space provision of the Hub, so it would to have fixed and flexible facilities in these areas to meet all the requirements of the various strands and audiences. This would mean that some of its facilities would be geared to catering to one strand, while there would also be spaces available that could be adapted to various strands. The Hub would be the site of larger scale activities than the satellites, and there would be provision for the larger scale offices of anchor tenants and the public sector agencies associated with the creative industries.

The satellites would provide the smaller and more temporary spaces needed for exhibitions screenings, socialising in bars, cafes and restaurants. They could also be the location for the artists in residence schemes described in Option 1. The ground floor of residential or office buildings would be the location of the satellites.

The hub and satellites option tie in with the existing framework in Eastside, and present immediate solutions to some of the obstacles faced by organisations such as Rhubarb Rhubarb and VIVID, by offering a number of spaces in which their existing projects can be taken. It would also tie in to the existing provision of the Custard Factory, which accommodates a venue, retail and exhibition space on the ground floor. However, Option 2 dilutes the distinctiveness of Option 1 – it reduces the scale of ambition for the Media Quarter and removes the associated economic benefits of having a national Centre located in Eastside. A Hub could not offer the focused purpose nor the scale of undertaking that a National Centre for Youth or Music could bring to the region.

5.4.2 Location of the Hub and Satellites

As in the case of Option 1, the geographical location of the hub and its satellites would be of strategic importance to creating a coherent and connected Media Quarter. Careful attention should be given to the positioning of the satellites in order to encourage movement between the satellites and hub. Multi events and seasons, such as the Digital Event and Festival Showcase, would be well suited to making use of the hub and satellites as they would provide a number of different locations around the Media Quarter. This spreading out of programming could be made to encourage physical movement around Eastside, and the eventual discovery of the whole area, if, for example, visitors were to purchase tickets in one location, and move across to various satellites to attend different events or elements of the season.

This model is more compact than Option 1, as the Satellites would be no more than a few minutes walk from the Hub. Accordingly, the space impact is more contained, whereas Option 1 would have a much larger impact across Eastside.

The Team believes there is land on which hub could be built – this would likely be on site 2 as designated on Map 3, as this is the largest single area owned by BCC. The provision of satellites will be dependent, at least partly, on public/private sector partnerships although there are a number of smaller BCC-owned sites that could also be used. Any number of Satellites could be created, provided the right relationships were forged. It should be noted that there may be an opportunity to create these satellites imminently, given the recent acquisitions made by the Custard Factory. However, the City should ascertain whether the location of these fulfils the requirement that the satellites promote the movement around Eastside.

5.4.3 Capital costs of hub and satellites

As for Option 1, the table below represents approximate estimations of capital cost amounts, based on initial specifications for a large hub and related satellites. As mentioned previously, the number of satellites created is dependent on a variety of factors, notably the forging of workable public/private partnerships that can deliver on the agenda.

Option 2 – Hub and Satellites	Size (sq.m)	Capital Costs (£m)	
		New Build	Conversion
Hub and Satellites	2850	4.5	3.3

Details of these calculations can be found in Appendix 1 of this report. As the satellites would be housed within buildings that have other uses, it may be possible to provide these facilities through the use of Section 106 agreements on individual developments within Eastside. This is discussed in more detail in Section 6.2.1 of this report.

5.5 Option 3: One Multi-purpose Centre

5.5.1 Description and programming

The creation of a single multimedia centre has been considered by the Team. This centre would draw together all the provision described for Option 1 and 2 under one roof and could potentially provide a more efficient use of space.

This option offers a couple of positive features. The provision of a large scale multimedia centre would have the capacity to answer the City's current and ostensible need for a mid-sized venue. Option 3 presents the obvious and immediately recognisable advantage of having reduced overheads as all provisions are drawn into one centre. From funding perspective, the City has already voiced considerable support for proposals that have been put forward, along the lines of this specification.

5.5.2 Location of the Multi-purpose Centre

According the information available, indications are that it would be possible to locate a centre of this scale below the railway line, on site 2 (see Map 3). There is also the possibility that, under the right circumstances, land around Curzon Street station would be available. While locating a multimedia centre in upper Eastside may be an option, the Team does not consider this a viable strategy for the development of a Media Quarter. Firstly, Millennium Point already exists there; secondly, a multimedia centre in upper Eastside would not function as an attractor for other parts of Eastside. Considerable development activity is already taking place in this part of the City - plans need to be made to spread it across the whole of Eastside.

5.5.3 Capital costs of multi-purpose centre

Approximate costs have been calculated on the basis of initial specifications. As for the previous options, these should be considered as indications only.

Option 3 – Multimedia Centre	Size (sq.m)	Capital Costs (£m)	
		New Build	Conversion
Multimedia Centre	3500	5.4	3.8

5.6 Preferred Recommendation for nuclei of activity

An integral part of the success of the Media Quarter is the creation of nuclei of activity. The Team suggests that Option 1 responds to the true needs of the City and region as identified by extensive research and consultation, and as illustrated by Parkinson. The Team acknowledges that these recommendations come at a time when some of the City's major institutions, such as UCE, are looking to draw a number of campuses and faculties together in order to cut overhead costs, and the creation of three centres may present as a diversion from this impetus to 'conglomerate'. However, there is strategic purpose to the creation of three centres and their geographical triangulation, as explained previously in this report.

Option 1 best fulfils the Plan for a Media Quarter because it:

- creates a critical mass of activity throughout the entire Media Quarter;
- links the various parts of Eastside together;
- promotes movement around the Media Quarter and retains people there;
- provides the opportunity for a centre of excellence in Eastside;
- provides the opportunity to profile music and the sonic arts which are currently under represented on public agendas;
- distinguishes the Media Quarter from others in the City and the world; and
- promotes a cohesive, all inclusive and integrated Media Quarter;
- has the potential to deliver several centres of excellence which, in turn, are more likely to deliver the full range of economic benefits described in Section 7 of this report.

The Team acknowledges that certain proposals put to the City, such as that for a Digital Diversity Centre and a Film Centre, contain some of the same programming elements as the three Centres. Option 1 does not preclude creating centres of the same scale and type as those suggested in these current proposals.

5.7 Sustainability of the options

An initial assessment of the sustainability of the three options can be made by examining the possible revenue streams of the options and whether it is likely that there will be sufficient revenue streams to support each option. This comprises the analysis of two elements – the capital cost of building the Centres and the operational costs of the day-to-day running of them.

The capital costs are likely to be funded by the public sector, unless a large-scale commercial element is incorporated into the Centres, such as residential, retail or commercial offices. AWM and BCC in particular can bring additionality to the development of the Media Quarter in this area. It may be that organisations such as ACE would invest in such a capital project, while contributions from Section 106 agreements should also be explored with developers. The funding possibilities are discussed in further detail in Section 6.2 of this report.

The Team suggests that the following revenue streams would contribute to the sustainability of each of the options once built:

A variety of revenue streams would render the Centres sustainable. These might include, but not be limited to, rental or facilities, and service charges for:

- the workspace[21];
- the artists' studios[22];
- exhibition space
- screens
- production space
- teaching space
- business support services

If a specialist organisation was taking tenancy within the Centres to run them, they would pay rent, however a reduced rate or even free premises, at least in the initial period, may be an incentive to attract, for example, a national body.

Funding from the Learning and Skills Council or HE institutions may be available for teaching activities and covering items beyond rental, e.g. overheads, core staff costs, operational costs, etc. Bars and cafes would generate income, albeit modest, in the form of rental and/or franchise revenue from a private provider; and/or, as per the typical current approach, a share or all of the profit if run in-house. Tickets sales for all chargeable events would also generate income. Again, ticketing might be subcontracted out to an external provider such as Ticketmaster.

The sustainability of a Centre would be greatly enhanced if it were a centre of excellence, as this status would attract additional sources of funding. Another method of increasing the sustainability of the Centres is to make parts of them 'artist-run'. These types of spaces are distinct from public art galleries, museums and commercial galleries and spaces can vary in structure and models. Their output can vary from gallery exhibitions, off-site public artwork, fostering the artwork of communities and particular mediums. Strategies such as hosting screenings, festivals, publishing books, holding seminars and readings, organising residencies and forums are all means which contribute to their sustainability and fulfilling their mandate. Artist-run spaces are non-profit organisations, formed and directed by artists to support the production and producers of media. Examples of this type of network exist all over the world[23] and are generally recognised as contributors to urban regeneration. Organisations such as Vivid, Ikon and Rhubarb Rhubarb could collaborate on such schemes.

It is beyond the remit of this study to elaborate business plans for each of the options, which would go some way to indicating their sustainability. However, the Team believes that the revenue streams outlined above would have the capacity to sustain the Centres' operational costs on a day-to-day basis. Options 2 and 3 may be considered more sustainable on the basis of overhead costs, but apart from presenting associated problems of their own, the cost of overheads is not the criteria the City should use if it is truly going to deliver the ambitions inherent in the Plan.

21 Research suggest c. £10/sq. ft., however this should be benchmarked against offices such as those at the Custard Factory. Prices will alter according to the specification and the market being targeted.

22 Same issues of price and specification as previous bullet point apply.

23 Examples of artist-run spaces include City Racing (London), BANK (London), Sparwasser HQ (Berlin)

6. Planning the Media Quarter

6.1 The Three Phases of Development

6.1.1 Phase I – immediate next steps

Phase I of development will lay the foundations for the Media Quarter. The first action needed is for the Plan to be agreed, and disseminated. This will involve a process of public presentation of the Plan. Discussions should be held to determine what might be the best method of achieving this sort of communication. A prospectus will be drawn up and designed as part of this stage. It may be that a series of public presentations are conducted, or that smaller, more interactive events in across the City and region are organised. As the Media Quarter will have regional and national impact, consideration should be given as to how the Plan will is communicated beyond the City. An objective of the dissemination process will be to achieve buy-in from all necessary parties – communities, private and public sector agencies. AWM and BCC will also need to embark on a process of 'educating' their entire agencies. In addition, steps should be taken to incorporate the Plan into the Masterplanning process for the whole City.

A next step will be organise a tender process or call for proposals for the Centres. Simultaneously, the relevant planning documents should be written by BCC and all planning departments informed of the changes. While the propositions put forward will set out next steps necessary for the relevant centre, initial approaches can be made to funders on by BCC and AWM. It should be understood that the focus of development should be Middle and Lower Eastside, given the level of activity in Upper Eastside – BCC should seek to secure and retain land in these areas that may potentially be used for Centres. Once an option for the nuclei of activity has been decided, it should be brought forward as part of Phase I. Improvements in the public realm should also be implemented. The exact time-frame for the completion of these elements of the Plan will be dependent on a number of factors such as:

- the chosen option for the nuclei of activity;
- the timing and amount of funding secured for this option;
- the City's time-frame for developing Digbeth High Street;
- the timing of developments that are contributing to public realm and other improvements through Section 106 agreements.

A wider and more long-term consideration for BCC and AWM will be the creation of an appropriate brand that can summarise and communicate the long-term endeavour of developing a Media Quarter in Eastside.

Lessons learnt from the study of emerging Media Quarters around the world show that while they are based on ambitions of economic growth and creative excellence, the outcomes of development are difficult to measure. The City should establish range of goals for Eastside as a whole to achieve over time. These should provide the framework for a number of success criteria and milestones for progress by which the Eastside Media Quarter will be monitored. The Team suggests these 'benchmarks of success' correspond to the seven guiding concepts of the Media Quarter.

6.1.2 Phase II - further developments

Longer-term considerations should be addressed during Phase II. For example, planning guidelines should be submitted for inclusion in the LDF. If the creation of several nuclei of activity has been opted for under Phase I, the City should aim to deliver further Centres in Phase II. In addition, public realm improvements should be completed so as to realise the full benefits of a connected environment.

Continuity of leadership and implementation should be ensured in this 'transition phase'. It is likely that Eastside will be experiencing different stages of development at this time. The Team is aware of activity which is due to be finalised within a broad time-frame – ARTicle is due to begin in 2007, while larger scale projects, such as Martineau Galleries and CADMA in Upper Eastside, will reach completion between 2010-13 time-frame at the earliest.

6.1.3 Phase III - ensuring continuity

Phase III will focus on building on existing work and maintaining progress. The same principles applied in Phase I and II should apply. Whilst ensuring continuity of leadership, the City should ensure that programmes offered by the Centres remain cutting edge and maintain links with current policy agendas of the time.

Over time, the City should use the benchmarks established in Phase I to monitor the progress and development of the Media Quarter. Successes should be communicated and documented across the world, so that Eastside continues to be promoted as a thriving and dynamic place to do business and live.

6.1.4 Summary of responsibilities and development timescale

	ACTION	RESPONSIBILITY
PHASE I Next 2-5yrs	Disseminate Plan	BCC / AWM
	Incorporate Plan into Masterplanning process	BCC
	Vision of LDF documents written and measures taken	BCC
	Put out tender for creation of Centres	BCC / AWM
	Establish and retain possible sites for development of nuclei of activity	BCC [possibly AWM as well depending on land ownership]
	Beginning branding?	BCC/ AWM?
	Establish Centres according to Option 1 or 2	BCC, AWM and partners
PHASE II Next 10 yrs	Complete nuclei of activity	BCC, AWM and partners
	Complete public realm improvements	BCC/ private developers
PHASE III Next 20 yrs	Ensure effective programming of Centres and adherence to Plan	BCC/ AWM
	Monitor progress of Media Quarter	BCC/AWM in collaboration with tenants of Eastside

6.2 Funding the development of a Media Quarter in Eastside

6.2.1 Possible sources of funding

There are three strands of activity that will require funding:

- capital costs for building and developing the Centres;
- project and initiatives in Eastside;
- public realm improvements.

The costs for the first element have been estimated earlier in this report, and it has been noted that it will be primarily the responsibility of AWM and BCC to raise the funds for capital development of the Centres. With regard to the last two elements, it should be noted that until clear proposals are put forward following a feasibility stage, and until the City has committed to serious plans for public realm improvement, it is not possible to ascertain what sort of amounts of funds will be required. However, the Living Landmarks bid contains a £12 million chunk that would be allocated to public realm improvements across Eastside in the event the bid is successful, although this represents a relatively small amount considering the scale of work needed. It is also not guaranteed that these plans would be carried forward if the HLF bid is unsuccessful.

Other than BCC and AWM, it should be highlighted that other sources of funding may include, but are not limited to: ERDF, ACE, UKFC. Eastside contains a number of listed buildings and falls within a Conservation Zone, two factors which could draw in the interest of HLF funds.

Section 106[24] of the Town and Country Planning Act 1990 allows BCC, as the local planning authority (LPA), to enter into a legally-binding agreement or planning obligation with a land developer over a related issue. The obligation is sometimes termed as a 'Section 106 agreement'. Such agreements can cover almost any relevant issue and can include sums of money. S106 agreements can act as a main instrument for placing restrictions on the developers, often requiring them to minimise the impact on the local community and to carry out tasks, which will provide community benefits.

Section 106 agreements could support the development of the Media Quarter both directly and indirectly, as described below:

- Directly, S106 agreements could be made with developers to provide space within their developments to provide elements of the satellites, under the hub and satellites model for the Centres. This would have the added advantage of embedding the facilities of the Media Quarter within new mixed-use developments. A more traditional direct approach would be to use S106 for public realm improvements (and maintenance) around Eastside.
- Indirectly, S106 agreements can be made for cash contributions from developers, which could then be pooled from more than one development to fund one or more of the initiatives needed to contribute to realising the Plan (as long as these initiatives were relevant in planning terms to the developments in question and the contribution was invested within a reasonable timeframe).

Policy agendas may make funds available for the activities undertaken in the Media Quarter. Of particular relevance with regard to a potential National Centre for Youth is the Youth Matters policy,

24 Section 106 of the Town and Country Planning Act 1990 allows the local planning authority (LPA) to enter into a legally-binding agreement or planning obligation with a land developer over a related issue (a 'Section 106 agreement'). Such agreements can cover almost any relevant issue and can include sums of money. S106 agreements can act as a main instrument for placing restrictions on the developers, often requiring them to minimise the impact on the local community and to carry out tasks, which will provide community benefits.

an extension of the Every Child Matters agenda. Youth Matters proposes that young people aged between 13 and 19 years old, should have[25]:

- more things to do and places to go in their local area - and more choice and influence over what is available;
- more opportunities to volunteer and to make a contribution to their local community;
- better information, advice and guidance about issues that matter to them, delivered in the way they want to receive it;
- better support when they need extra help to deal with problems.

Dedicated funding is available to support objectives of both these agendas. The Youth Capital Fund is aimed at enabling local authorities to develop new approaches to strategic investment in youth facilities, particularly in deprived neighbourhoods.

There is a total of £115 million available through the Youth Opportunity Fund and the Youth Capital Fund over 2006 to 2008 (£31 million per year for the YOF and £26.5 million a year for the YCF). Some of the objectives of both funds are to:

- change the way that local authorities and their partners provide activities and facilities for young people, especially in deprived neighbourhoods, increasing the responsiveness of providers to what young people want;
- provide opportunities for young people to develop their confidence, knowledge, skills and abilities, gaining recognition and accreditation;
- increase young people's engagement with services and with the democratic process at local level;
- increase the well-being of young people ;
- improve 'things to do and places to go' in line with what young people want in their neighbourhoods;
- give a voice to young people, particularly disadvantaged young people, in relation to things to do and places to go, conveying a powerful message to young people that their needs and aspirations are important [26].

The proposal for a National Centre for Youth would fulfil all government funding requirements and therefore there is the real possibility of securing funding under the Every Child Matters agenda.

Birmingham-based national organisation First Light has already been elected to lead the consortium charged with the £6 million Youth Media Fund, which complements the aims of Every Child Matters and Youth Matters and that will help deliver a range of initiatives to support media projects targeted at disadvantaged young people.

The five themes that anchor the Media Quarter have been chosen, as mentioned previously, to secure the most possible buy-in from relevant stakeholders. It is therefore possible that the concepts brought together under the banner of the Eastside Media Quarter will attract the direct investment of companies with an interest in digital innovation, the screen industries, the sonic and visual arts and other future-facing concerns. Corporate sponsorship of this kind can have positive PR impacts. Advertising and PR strategies could also be used at the funding stage. The Team has recommended a tender process should decide on the best specification to take the Centres forward – this could be an international call for proposals from designers, architects and developers. Such a strategy could boost the profile of Eastside, put Birmingham's plans on the global map and potentially attract sponsors from the world over.

25 http://www.everychildmatters.gov.uk/youthmatters/whatisyouthmatters/
26 http://www.everychildmatters.gov.uk/youthmatters/youthfund/

Of key importance to securing funds will be the ability to form relevant partnerships and get stakeholder buy-in on a local and regional, national and international level. By some accounts, AWM and BCC have successfully delivered capital projects in the past as a result of forging strategic partnerships. It will be important to combine clarity of vision and unity of purpose with this track record of expertise in order to secure partnerships for the realisation of the Media Quarter's ambitions. Particular attention should be paid to the funding requirements of each organisation in stages of creating the specifications and programme strands for each Centre. Potential partners are identified in the following section of this report.

6.2.2 Partnerships are essential

Public sector intervention on the part of BCC and AWM will be essential to the realisation of the Plan and the creation of the Centres. Without their input, it will likely not be possible to raise the capital to fund the creation of the nuclei of activity The longevity of the Centres will depend upon partnerships with key organisations that would have an interest in seeing their realisation. AWM and BCC will be key therefore not only because of their ability to fund capital costs, but also because of their ability to bring important partners to the table.

Before embarking on the process of seeking out partners, the Plan must be agreed and steps taken to incorporate it into the Masterplan for the City centre. Once this consensus of approach has been reached, BCC and AWM can begin dialogue with potential partners' buy in for the Centres, in particular. Key stakeholders may include, but not be limited to:

- **Local and regional:** Birmingham Artists; b:RAP (Birmingham Race Action Partnership); Coventry University's Serious Games Institute; Culture WM; Film Birmingham; Innovation and Technology Council; Music West Midlands; Rhubarb Rhubarb; Screen West Midlands; TIC; UCE; University of Birmingham; University of the First Age; VIVID; Young People's Parliament;
- **National:** ACE; BFI; British Interactive Media Association; Commission for Racial Equality; DFES (Youth Capital Funds; Youth Media Fund) and the Youth Opportunities Fund); Disability Rights Commission; DCLG; DCMS; DTI; Equal Opportunities Commission; First Light Movies; Learning and Skills Council; Media Trust[27]; MLA; National Computing Centre; Open Advantage; UKFC; UK Youth Parliament; (Media Box)
- **International:** Apple; BT; Chicago's TCIAF; Cisco; HP; International Visual Communication Association (IVCA); Microsoft; Sonic Arts Network; Sony.

Effort should be made to work with local artist organisations in order to bring about the artist-run schemes that would add to the sustainability of the Centres. This would involve collaboration with existing networks such as Rhubarb Rhubarb and VIVID, building on the valuable links they have already made and adding value to the projects they commission.

27 "Media Trust works in partnership with the media industry to build effective voluntary and community sector communications" - http://www.mediatrust.org/about-us

7. Economic benefits of a Media Quarter

7.1 Overview

Across the globe, policy makers are placing increasing strategic emphasis on the economic importance of both cultural and heritage activities in general and the value of the creative industries in particular. In the new knowledge economy, as traditional manufacturing jobs migrate to low cost production centres, the importance of capitalising on cultural and creative industry activities, which can be retained within western economies, is of rising importance.

It is a truism that all cities are strategically placed. Historically, cities have grown and flourished in areas which represent key locations and crossroads for the trade links of industry. As manufacturing leaves these locations it is important to fill the gap left behind. As cities in the western world seek to fill those gaps with regeneration projects, which increase the attractiveness of those cities' offers, it is important that those offers be strategic in nature. Across the UK, all major post-industrial cities are banking heavily on cultural activities. This is as a result of the high number of well-established economic advantages to be gained from such investments.

The vision which this report articulates for Eastside is strategic in nature, in that the Media Quarter that is being suggested harnesses the dual potential economic power of both cultural activities and a creative industries hub. Indeed, the various vectors of the vision, which inform the purpose and outputs of the Quarter, demarcate the Media Quarter as unique. This will allow Birmingham to leapfrog comparable cities with similar regeneration intents. This section outlines the general well-established benefits of both a cultural centre and a creative industries cluster and then outlines the specific economic advantages resulting from the proposed Media Quarter.

7.2 General Economic Benefits of the Creative Industries and Cultural Centres

7.2.1 Economic Benefits of a Fixed Point Cultural Institution

In general, any fixed-point cultural institution, such as an arts centre, museum or art gallery, will generate a number of economic benefits. This is principally as a result of the fact that with such an institution the attendant spend associated with the institution will be experienced within the locus of the location of the building. Amongst the many well established economic benefits of a fixed point cultural institution include:

- Tourism;
- Footfall;
- Real estate value (both commercial and residential)
- Attractiveness/liveability of a city
- Strengthening the economy
- Multiplier effects

7.2.2 Tourism

In countries across the world, cultural and heritage sites form the backbone of tourism initiatives or local/regional regeneration projects. Examples of these include the Museo Guggenheim in Bilbao and the planned Acropolis Museum in Athens. Policy-makers for the creative/cultural industries, heritage sector and the tourism sector are increasingly becoming aware of the linkages between the sectors, and the importance of harnessing and maximising the economic value of tourism. In recent years, the cultural and heritage sector itself have paid strong attention to this potential value. A number of reports have sought to quantify the actual value of such tourism activities.[28] Whilst understanding the quantified extent and nature of the economic impact of cultural tourism remains an on-going task in many locations, it is clear that the economic benefits of such projects are already strongly embedded in policy-making decisions. Cultural activities, although inherently valuable in their own right, would not be funded to the degree to which they are without a high-degree of expected economic return.

7.2.3 Footfall

Successful centres implement numerous public leisure activities specifically designed to attract large groups of people both from the immediate community and further afield. These activities encourage footfall within the area as residents of a community, town, city and even other cities are drawn to the events. Individuals attending these events will often browse retail outlets, choose to patronise local restaurants and coffee houses and other businesses in the neighbourhood. This increased activity contributes to a larger market for neighbouring businesses, leading to 'retail vitality'.

7.2.4 Liveability / Attractiveness of the City

In the same way as cultural landmark buildings generate an economic effect as a result of tourism, so too such buildings increase the attractiveness and liveability of city to current and future residents. The nature of the proposed Media Quarter proposed is plural and inclusive. It is designed to appeal to the entire spectrum of the region's population. However, and in particular, recent research suggests that the existence of such facilities attract highly educated, highly skilled workers.[29] In a digital age, where it is becoming increasingly possible for highly skilled workers to conduct business independent of the location of their work spaces, it is all the more important to ensure that a city offers cultural experiences which cannot be found elsewhere. In turn, and as Richard Florida points out, the existence of a the “creative classes” in a city generates subsequent corollary benefits. Florida argues that “the presence of such human capital in turn attracts and generates innovative, technology-based industries.”[30]

7.2.5 Strengthening the Economy

The revenue derived from Creative and Cultural Industry (“CCI”) activities can contribute significantly to the local economy. For example CCI industries are a major driver of the London economy with one in five new jobs in London being created in the creative industries and adding more to London's output per annum than all other production industries combined. Successful enterprises will have strong revenue streams derived from their activity. These businesses create jobs for local residents and may also attract individuals with specific skills from outside the area and are often seen as high wage employers. Successful businesses will often re-invest in the area, seek to diversify and develop

28 *Viva City!* Oxford Economic Forecasting, July 2006

29 See for example the work conducted by the Work Foundation for the City of Manchester, *Manchester: Ideopolis, Developing a Knowledge Capital.*

30 R Florida (2001) *The Geography of Bohemia*, New York: Carnegie Mellon University.

alternative income streams, and utilise ancillary services thereby adding to the local wealth of the area/region.

7.3 The Economic Value of Creative Clusters

7.3.1 Creative Industries and National and Supra-National Policy

The particular economic value of the creative industries has been the subject of much policy attention both at a UK and EU level. Policy makers' interest in the creative industries is centred around the "added value" of the creative industries within the wider knowledge economy. With high-levels of broadband penetration reaching most corners of Europe, there is an increasing realisation amongst policy makers that the creative industries have an important and particular role to play in the vibrancy of Europe's economy.

At the European level the Lisbon Agenda (the European Commission's action plan for the growth of the knowledge economy in Europe) has highlighted the importance of the creative industries. In the UK the Creative Economy Programme was launched in November 2005 with the aim of turning the UK into one of the world's foremost creative hubs. The European Commission's recent Cultural Communication, stressed the contribution of the cultural and creative sectors towards the goals outlined in the Lisbon Agenda. This contribution takes the form of both direct economic impact and 'soft' links between creativity and innovation and European regional development and attractiveness.

7.3.2 European Creative Clusters

Section 9 of this report provides details of, and the specific lessons learned from, a number of creative industries clusters throughout Europe. In general, however, the economic value of such developments is well established. It is in recognition of the value of such clusters that cities such as Cologne, and Trollhättan have invested in audiovisual clusters. More recently, Terrassa (Catalonia) has decided to follow suit. Macro urban development and regeneration policies in many European cities have invested in the economic value of such clusters, with some paying particularly attention to new media and 'culture and recreation' facilities.

The economic advantages of clustering are well established and indeed are the motivating logic behind such concentrated groupings of similar business types. The creative cluster, however, presents distinct economic advantages in particular. Specifically, the added value of the creative industries and their high rate of growth explain the economic attractiveness of such investments. It has been statistically proven that the creative sector is out performing traditional industry sectors and on occasion even the ICT sector.

- The creative sector's growth in 1999-2003 was 12.3% higher than the growth of the general economy.[31]
- In 2004, 5.8 million people worked in the creative sector, equivalent to 3.1% of total employed population in EU25. Total employment in the EU decreased in 2002-2004, employment in the sector increased (+1.85%).[32]

31 *The Economy of Culture*, Study prepared for the European Commission (DG Education and Culture) by KEA Economic Affairs, October 2006.

32 *Ibid*

- The creative sector turned over more than €654 billion in 2003. Car manufacturing industry was €271 billion in 2001. ICT manufacturers was €541 billion in 2003 (EU-15 figures)[33]
- The creative sector contributed to 2.6% of EU GDP in 2003. Real estate activities accounted for 2.1% The food, beverage and tobacco manufacturing sector accounted for 1.9%. The textile industry accounted for 0.5%. The chemicals, rubber and plastic products industry accounted for 2.3% [34]

Beyond such raw data, investment in the creative industries is being made for a number of 'softer' but still economic reasons. Such reasons, which combine the economically tangible with the less tangible, are social reasons. Examples of these include:

- increasing the intellectual capital of a city;
- skill development and skills transfer to businesses which work in partnership with the creative industries;
- renewal and diversification of the city.

All such aims work towards the successful socio and economic prosperity of a city – the ultimate aim of urban regeneration.

7.4 Bridging the Gap with the National Average

"The creative industries are at the heart of the world economy. A major source of employment across Europe and North America, some of the world's largest companies are creative businesses – publishers and music labels, advertising agencies, film and television studios, media and entertainment companies."[35]

The Media Quarter will be pivotal in growing, promoting and supporting the West Midlands creative industries sector. This will be essential to bridging the national average gap currently experienced by Birmingham.

A recent study[36] of Birmingham's creative industries shows that whilst the city has a number of strengths, it currently fails to punch its weight in comparison with both its closest peer, Manchester, and the national average. Whilst the Media Quarter cannot close this gap on its own, it would act as a focus for development of the sector and thereby act as the catalyst for unleashing the growth potential that Birmingham's creative industries have still to tap.

A recent study of Birmingham's creative industries shows that:

- At least 25,925 people were employed in the creative industries in Birmingham in 2005 (and in reality freelancing is likely to increase this number significantly)
- This represented 5.2 % of employment in the total economy in Birmingham
- Moreover, this employment made a particularly strong contribution to the local economy, accounting for £1 billion of GVA, 8.7 % of Birmingham's total
- Historic growth rates for the creative industries have been strong, at 4.4 % per annum compared to the whole economy average of 0.8 %

33 *Ibid*
34 *Ibid*
35 *Facts and Figures*, CreativeLondon
36 Lutz, J. et al. (2007) "Making the Business Case: Baseline and Growth Study of the Creative Industries in Birmingham", prepared for Birmingham City Council, Centre for Urban and Regional Studies, The University of Birmingham

However, the study also highlights the weaknesses of the creative industries in Birmingham, especially when benchmarked against Manchester's creative industries and the UK average. Such an analysis shows that the creative industries in Birmingham remain weak in comparison with the national average, employing relatively fewer people, generating lower GVA per head than the UK as a whole or Manchester. Only advertising, architecture, and radio & television are revealed as specialisms of the Birmingham creative economy, and then only marginally, compared to Manchester where 6 of the 9 DCMS creative sub-sectors have above average employment.

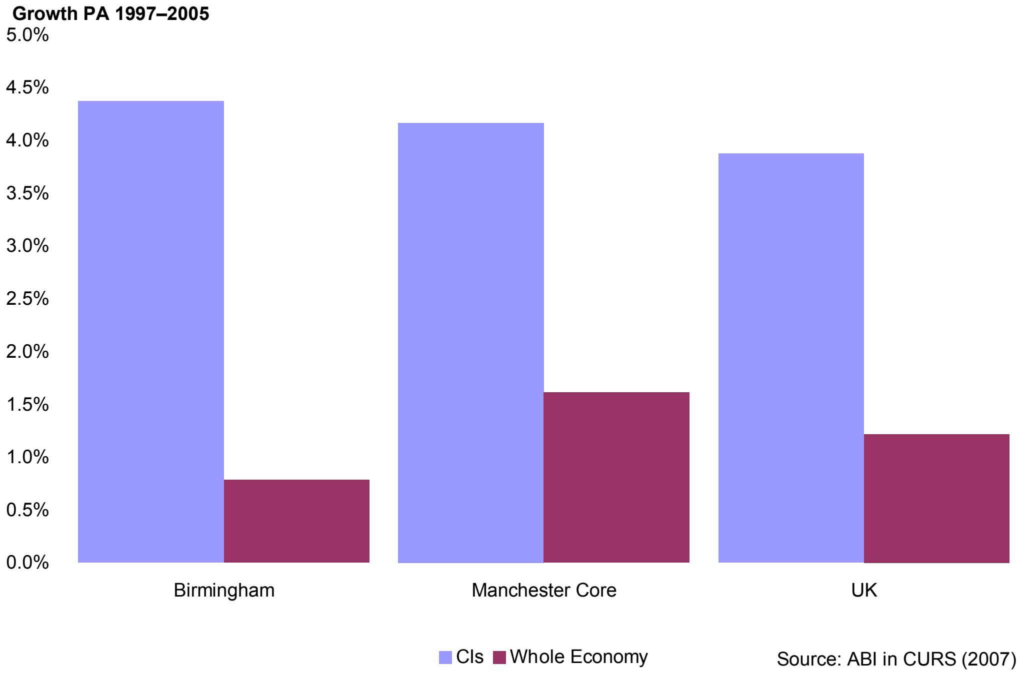
In current terms, the gap for Birmingham against the relative size of creative industries found in Manchester and the UK as a whole translates into the following employment and, therefore, GVA shortfall.

GAP	**Manchester**	**UK**
Employment	2,432	3,842
GVA @ current levels	£81,078,378	£128,065,419
GVA @ prevailing averages (i.e. Manchester & GB respectively)	£82,992,543	£169,871,566

If Birmingham were to close the GVA gap it has between both Manchester and the UK, this would further increase the contribution of the creative industries to the City's economy:

Positively for Birmingham, the historic growth of the creative industries between 1998 and 2005 has, on average, outstripped both the national trend and the performance of Manchester. In line with the picture nationally, this rate is significantly higher than growth rates in the wider economy, as shown below.

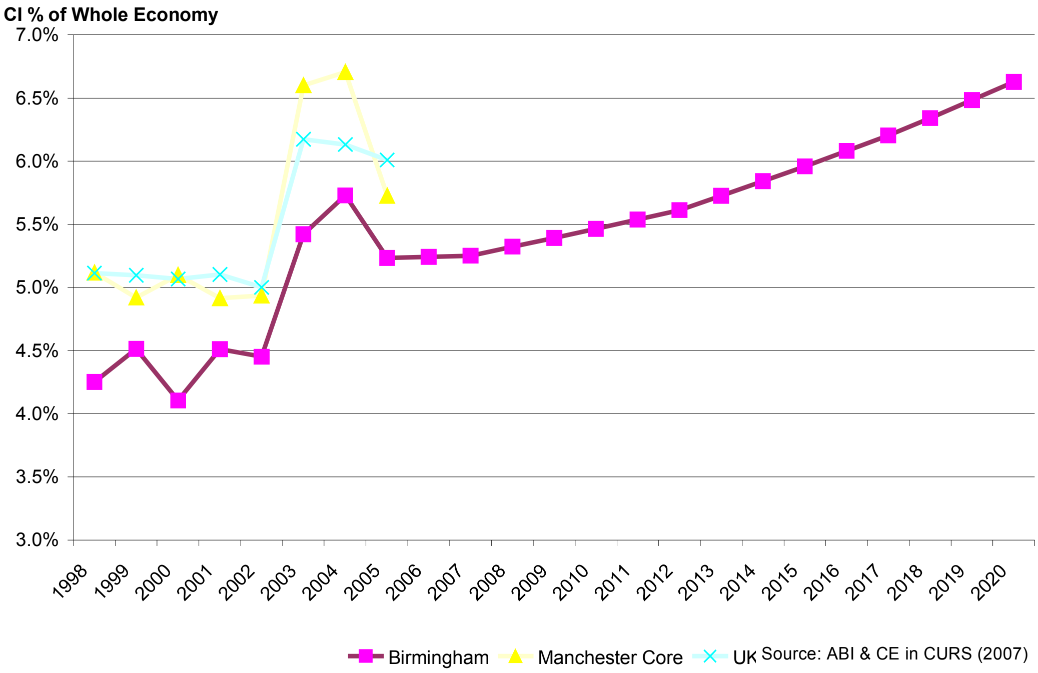
Average Annual Growth Rates, 1997–2005



Whilst these rates suggest that, assuming part trends continue, there could be a natural process of catch-up for Birmingham's creative industries, the performance gap with both Manchester and the UK could take several years to narrow. And in reality, Birmingham's high growth rate is likely to slow, since it is partly a result of the relatively small size of the sector at present. Moreover, new developments such as MediaCity:UK in Greater Manchester are likely to see significant further growth that Birmingham is unlikely to match without further support. Indeed the risk is that UK 'regional' media activity becomes concentrated in and around Greater Manchester once MediaCity:UK is established, undermining Birmingham's current position.

Whilst the CURS report does not provide equivalent forecast data for Manchester and the UK, the data it provides for Birmingham shows that on historic trends, the city's creative industries are at least a decade behind their counterparts' current position.

Historic and Forecast Growth Rates for the Creative Industries relative to the Whole Economy, 1998–2020



The creative employment impact of the Media Quarter is likely to be relatively small, even if the indirect employment supported through the multiplier effect is included, as shown in the table below. But if this forms the heart of a wider commitment and focus upon supporting the media and wider creative industries, then the catalytic effect could be considerable.

	Direct Jobs	Myerscough multiplier
Digital Vision Centre	17	37
Sound Centre	17	37
Youth Centre	3	7
Grand Total	**37**	**82**
Hub & Satellites	27	60
Multimedia Centre	53	116

* NB this option incorporates larger workspace provision, which accounts for the higher job figures
Source: DTZ calculations using standard EP employment densities plus Mysercough's (1977) seminal study of multiplier effects in the arts

Doing nothing leaves Birmingham short of at least 2,400 jobs generating £80 million of GVA, the number that would be expected if the city performed as well as its nearest peer, Manchester. Ultimately, closing the gap with the national average would create approximately:

- 3,800 additional jobs, generating £170 million of GVA

7.5 Specific Economic Benefits of the Media Quarter

The Media Quarter has been conceived around seven foundation concepts, reflected in the nuclei of activity, all of which are linked to tangible economic benefits. The economic benefits of the Media Quarter in relation to the founding concepts are noted below:

7.5.1 Growth

- The Media Quarter will contribute to the success of the creative industries in the region – it responds to all the findings of the Mayor of London's Commission on the Creative Industries, which identified the following impediments to success for the creative industries[37]:
  - access to property on reasonable terms and negotiating those terms;
  - access to markets;
  - people and industry information;
  - lack of showcasing and international promotional opportunities;
  - lack of start-up and Intellectual Property advice;
- The Media Quarter will contribute to bridging the national average gap as noted in Section 7.4 of this report.

7.5.2 Work

- The economic value of the creative industries overall is well articulated and acknowledged by all G8 countries. Businesses operating in this sector are noted for being high added value, and for delivering economic benefits on a number of levels. By housing a high concentration and a variety of creative businesses, the Media Quarter will a place that promotes the growth of the sector, and encourages the formation of new businesses in an innovative and flexible environment apt for the digital future.

7.5.3 Championing the region

- The Media Quarter will send out a visible and confident statement about the global importance of the region and the excellence of its creative industries.
- This message will attract national and international business interest as well as cultural tourists.
- The value of cultural and business tourism – a sometimes overlooked area of tourism is the value of the business tourist. Often a business tourist will look to include either a visitation to a local or landmark cultural establishment as part of his/her trip. Given the dual-nature of the Media Quarter as business centre and landmark building, the Media Quarter would attract both the cultural visitor and the spend power of the business visitor.

7.5.4 Connectivity

- The connectivity of the Media Quarter will be apparent on three fronts:
  - the physical infrastructure of the Media Quarter with the rest of the City, the nation and the world;

37 Creative London; http://www.creativelondon.org.uk/server.php?show=nav.009004002

- the cultural connections the Media Quarter will have with the various countries of origin of the diverse population of the region, which will be represented in the Media Quarter;
- the virtual connections of the Media Quarter will make it accessible through digital communications channels. This will be witnessed through Digital Birmingham, but also through the fact that the content and production of the Centres will be accessible remotely, thus opening up the Quarter to the rest of the world and building audiences.

- Each of these fronts has the potential to generate economic impacts:
    - physical infrastructure:
        - again, this will help promote tourism and increased visitor numbers. As explained above, cultural tourism generates specific economic impacts;
        - footfall will be increased;
        - sound infrastructure will increase the overall efficiency of traffic, incentivising increased visitors and residents to experience the Media Quarter, and improving liveability.
        - Increased efficiency has knock on economic benefits for learning, working and living processes;
    - cultural connection: this has the potential to offer preferential access to overseas markets for distribution and cultural exchange -see below;
    - virtual connections also contribute to opening up the Media Quarter to another audience, other than the one that physically comes to visit it. In the digital future, a virtual presence is essential to generating tourism and putting the Media Quarter and all it stands for on the map.

7.5.5 Cultural

- In general, any fixed-point cultural institution will have economic impacts in the precise are in which they are located. A study by DTZ in association with LSC, examining the impact of the cultural industries in the London borough of Southwark found that the Tate generated the following economic impacts on the immediate surrounding area:
    - £155 million in direct visitor expenditure
    - a net income impact of £247 million
    - 2,300 jobs in direct employment

  Whilst the proposed Media Quarter does not benefit from being located in the capital nor benefit from the international visibility of the Tate, nevertheless these figures point towards the significant economic potential of cultural institutions.
- The plurality of the Media Quarter offer will make it substantially more attractive than other cultural offers around the world, and will contribute to making a distinctive mark on the global stage. The diversity of the region is a strength that will be part of the overall message of the Media Quarter, contributing to its power to generate business and cultural interest.
- The different communities of the region can be a means of accessing and developing foreign markets for creative products and services. Events such as London's India season, India Now, running from July to September 2007 seek to capitalise on this potential. India Now celebrates past and present Indian culture, with the objective of highlighting the strong economic and cultural links between London and India. Market access has been noted as a key factor in increasing the economic prosperity and activity of the creative industries by the Mayor's office.
- The further international impact of the Media Quarter has already been noted above.
- Recent research emerging from North America, principally by Richard Florida, indicates that high levels of diversity within a region (measured on a variety of indices) have enjoyed the

fastest economic growth over the last decade.[38] The culturally diverse has an economic value too. The ethnic diversity of a region has associated overseas markets – these provide additional possibilities of receiving and exchanging cultural products.

7.5.6 Liveability

- The liveability of Eastside will make it a highly desirable location for people to live and work. It will attract the 'creative class', which is characterised by its employment within the creative industries and its lifestyle. Economic impact studies such as Cambridge Econometric's *Economic Impact of the UK Screen Industries* point to the secondary economic benefits, generated by the local spend of a highly skilled local workforce, gained by regions of having this kind of community located within it.[39]
- Uniquely, the Media Quarter combines the cultural, the creative and the innovative. Such a combination is economically potent. If, as Richard Florida argues, the cultural is the precursor of the technological, then the nature of the proposed Media Quarter is likely to fasten such economic benefits. The concept of the Media Quarter straddles the cultural to the technological. In the light of such a link, Birmingham would be well-placed to both increase the attractiveness/liveability of the city and be seen as city in which further technological investments should be made by industry.

7.5.7 Learn

- It will be attractive for the students in Upper Eastside to be located within a thriving Media Quarter, and to have convenient access to the provisions of the Centres.
- Graduate retention and the impact this has on growing the sector will be helped by two factors:
  - The Centres will encourage ambition and entrepreneurship in young people, as they will be part of showing what the creative industries can produce and what working in this sector can lead to. This in turn will contribute to growing the sector.
  - Effective learning and subsequent employability of graduates will be enhanced by two factors:
    - the location of educational establishments in such close proximity to creative businesses;
    - the Centres will provide the space for genuine interaction between the HE sector and industry.
- The number and variety of media and technology related courses on offer and the research and development operations located in Eastside will make it a place of intellectual capital.

7.6 The Media Quarter will grow the Screen, Image & Sound Cluster

The Centre(s) proposed would respond directly to the recommendations for growing the Screen, Image & Sound Cluster, put forward in recent analysis of the sector[40], in the following ways:

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38 Richard Florida quoted in *Fostering Diversity to Breed Success, Notes from Seminar*, Creative London, February 2003
39 *Economic Impact of the UK Screen Industries*, Cambridge Econometrics and Optima Consulting, 2006
40 *Screen, Image & Sound Cluster, Preliminary Impact Study*, Burns Owen Partnership, July 2007

- The centre(s) clearly provide such a focus and platform for specific CI support that is called for under the recommendation for 'Infrastructure for flagship projects'
- Networking is recommended as the bedrock for regional support – by providing a physical focus for the CIs and the location for agencies and networking events, the centre(s) can help to raise the profile and access to support for the specific CIs involved
- By providing workspace of various types of businesses on site together with business support infrastructure (e.g. temporary or permanent offices for existing business support agents and/or the presence of national centres of excellence on site), the centre(s) play an important role in:
  - supporting business start-ups, as per recommendation 2 of the sector analysis;
  - providing a route for "graduate retention and progression", as per recommendation 3; and
  - through the centres of excellence, supporting "high growth" companies, as per recommendation 4.
- all this provision is within one of the main centres for the CIs within the West Midlands and within the existing focus for CIs of Eastside
- A core focus of the Centre(s) is "skills development", as per recommendation 5. This ranges from the provision of the Youth Centre, where imparting basic CI relevant skills is the central remit from an early stage.
- The other Centre(s) provide education, training and development opportunities (e.g. artists in residence). The centres of excellence and presence of combined or interlinked specialist centres provides a route and focus for "business innovation and 'convergence'" as per recommendation 6.
- The centre(s) will have a brand and profile raising role through their flagship status, and, as part of this, can host events, band performances and other showcases to promote the West Midlands and especially Birmingham as the centre for the CIs, as per recommendations 7 & 10 for growth the cluster[41].
- The presence of centres of excellence within the Media Quarter is also likely to result in the gathering and analysis of "evidence and intelligence" as per recommendation 9.

41 *Ibid*

8. Context of the Parkinson Report

8.1 Overview

Parkinson's Visioning Study identifies five key drivers of competitiveness: Innovation and skills; economic and cultural diversity; connectivity; strategic capacity; quality of place. These five elements are identified as areas of focus when moving forward in the development of the City Centre – as such, they should be the 'DNA' that informs any evolution of the Birmingham landscape. The Team has taken this into account – indeed it is recommended that The Plan for Eastside presented in this document be incorporated into the Masterplan, which is being created to take forward the ideas of the Parkinson Report. To facilitate and justify this process, this section illustrates in what manner the Plan captures all five of these drivers and seeks to create a part of the City where they would all be in evidence.

Innovation and skills: there is a strong emphasis on making Eastside a place where innovation in media takes place and where skills to enter the knowledge based economy are honed. Not only would some of this take place in the Centres proposed, but the Centres would have strong links with the academic institutions already on site in upper Eastside and would complement the courses and activities they offer, either by providing the space and facilities to house their activities, or by providing complementary sessions to courses being run at the institutions themselves. The Centres and the Media Quarter in general would promote much closer links between universities, local government and the industry.

8.2 Economic and cultural diversity

The Media Quarter will answer the needs of the region's creative industries – it will provide workspace, facilities and services for media companies, it will provide exhibition space to showcase the region's creative output, and it will foster national and international links to benefit the companies located in the area. The totality of this provision will assist the West Midlands as a whole in diversifying its economy and completing the transition from predominantly manufacturing-based economy to a knowledge-based one. Cultural diversity would be at the heart of the Eastside offer – there would be a strong mandate to display the work of creatives from all ethnic backgrounds working in a variety of fields and the programming of each of the Centres would cater to people of all ages and background. It would also draw people in from around the region, so that the population of the West Midlands would see itself reflected in the Media Quarter as well as engaging in its output.

8.3 Connectivity

An integral part of the Team's recommendations is the fact that Eastside needs to be future-facing in terms of its physical and virtual connections to the rest of the City, region, nation and world. On the one hand, the Team applauds all Parkinson's suggestions for systematic, deep-rooted, strategic improvement of the public realm and infrastructure of Eastside and the wider City centre, such as the call for a more 'permeable' environment, inter-connected by public paths and cycle routes, and better street lighting. The Team echoes the call for "corridors of connectivity and information" and for articulating the City to the average citizen, business or visitor and states that the development of a Media Quarter and the Plan for Eastside will only be achieved if substantial public realm improvements are made. This report puts forward the premise that any development for the future would be pointless if it did not take into account and integrate the technology of the future – Parkinson too notes the necessity to embrace the digital future.

8.4 Strategic capacity

This report calls for the unity of purpose, continuity of leadership and long-term partnership approach that Parkinson signposts as a key driver for competitiveness. The Plan contained in this document provides the direction for Eastside for the next 30 years and beyond, and it calls for the international approach, the strong marketing and self-confidence, sustainable development and coherent focus required. These elements are where the public sector can truly bring value, as they have the capacity to see through the long-term process of realising the Plan.

8.5 Quality of place

The Plan aspires to a Media Quarter based on the characteristics that Parkinson considers deliver quality of place. It will bring representatives of all sections of the region's population together in one place located near the City centre. It will offer visitors, residents, workers, a multicultural experience, and young people a welcoming, accessible ambience and activities. It will be the site of festivals, celebrations and popular events. The Media Quarter will embrace its history and heritage through its outputs and architecture, and it will be an integral, accessible part of a sustainable, permeable City centre.

8.6 Delivery

The Team acknowledges Parkinson's call for a delivery vehicle. If the City decides to create the 'City Development Company' that Parkinson suggests is needed to deliver the Masterplan, once it is created, it may be an idea to have a section of that deal with the Eastside. Or else the City Development Company may operate in a different way, concentrating all resources on one development at a time, as Parkinson suggested may be more appropriate. The most logical course of action would be for the recommendations contained in the Team's report to be integrated into the Masterplan, and delivered as part of this in due course.

9. Case Studies

9.1 Overview

This section presents detailed case studies of four urban regeneration programmes led by the development of a Media Quarter. The key findings emerging from the Team's benchmarking of comparator media clusters in Cologne (Germany); Seoul (South Korea); Barcelona (Spain); and Sheffield (UK) are followed by an exploration of the lessons that may be drawn from this analysis. More detail on the benchmarked cases can be found in Appendix 2 of this report.

The subjects of all four case studies were selected on the basis of their similarities with Birmingham Eastside, which are summarised as both Eastside and the case study subject:

- involve the re-development of a discrete quarter within an urban centre;
- are embedded within wider strategies for urban regeneration based on the creation of creative clusters to harness the social, economic, and cultural returns from the creative and cultural industries, as well as new technologies and new media; and
- have received considerable public and private investment.

9.2 Summary Case Study Findings

9.2.1 Cologne, Germany

The creation of Cologne's MediaPark was based around the redevelopment of an inner-city ex-freight depot into a quarter for film, television, radio, and ancillary media services. The MediaPark is part of a strategy to regenerate the city-centre and the local economy by building on Cologne's historical strengths as a media hub, and constitutes a cornerstone of the city authorities' promotion of Cologne as a 'Media City'. The MediaPark has also benefited from concerted public-sector support and complementary policy measures enacted by both the city municipality and the Northrhine-Westfalia ("NRW") regional government. The Media City project began in 1980 and is still ongoing – construction on the MediaPark was initially scheduled for completion in 1995, but has been delayed by construction problems and financial restrictions. Investment to date is in the vicinity of €700 million.

The complex is owned and managed by a limited company born from a Public-Private Partnership between the municipality of Cologne, the Northrhine Westfalia regional government, and private investors. Public-private partnerships have provided financial support for media projects and for a regional film fund, as well as the development of networking events including the annual Cologne Conference, all of which have contributed considerably to the development of the MediaPark. The MediaPark offers tenants a network of advanced communications technology as well as eight groups of architecturally innovative buildings each catering to a different media subsector.

The impact of the Media City initiative has been strongly positive, resulting in the creation of an estimated 50,000 additional jobs in Cologne, the development of ancillary events and trade fairs, as well as physical infrastructural regeneration.[42] The MediaPark has also become a significant tourist attraction within Cologne, attracting an estimated 4.5 million visitors a year, with associated economic benefits.

42 It should be noted that this is a consequence of the larger Cologne and NWR regional plan for economic and cultural development, rather than solely the result of the MediaPark's development.

9.2.2 Seoul, South Korea

Seoul's Digital Media City ("DMC") is geared towards the infrastructural redevelopment of the city's Sangam-Dong district, as part of a wider initiative to create a digital media and entertainment cluster dubbed the Sangam New Millennium Town in the outskirts of Seoul. Acquisition of land for the project began in 2002, and the DMC is slated for completion in 2010. Investment has thus far totalled 1.6 trillion Korean Won, or €1.3 billion.

The development has been spearheaded by the Seoul Metropolitan Government, in partnership with the Seoul Metropolitan Development Corporation and the city's Business Agency. The objective of the plan is to foster economic growth and promote job-creation in high-technology industries by creating a "futuristic info-media industrial complex that will serve as a centre of information technology in northeast Asia." A further objective for the DMC to interlink with existing new media and content firms located in Seoul, and to promote innovation and partnerships between new arrivals and existing operators. As such, the DMC is part of the South Korean government's larger policy agenda to transform the national economy from manufacturing-dominated to service and technology-led, and to promote Seoul as regional commercial centre.

Upon completion, the complex is expected to create an additional 270,000 local jobs, and induce capital inflows to the tune of 16 trillion Korean won (approximately €13 billion)[43].

9.2.3 Barcelona

Barcelona's 22@ development aims to regenerate the city's post-industrial Poblenou area and contribute to Barcelona's ongoing social and economic development. The project was started up in July 2000 as part of the City of Barcelona's Amended Metropolitan Master Plan (also known as the 22@ Plan). €180 million have thus far been invested in the project.

22@ is being taken forward by Barcelona City Council alongside a range of both private and public-sector partners. 22@ comprises seven distinct but overlapping strands of activity, each centred in a separate area of the complex and geared towards operators in different industries including media, information technology, and biomedical among others. Among the strands of activity are also separate initiatives catering to education and business development, as well as a range of complementary social initiatives to promote local skills development from the secondary-school level up. The initiative is intended to:

- promote urban renewal and economic growth;
- create a new city model in line with the realities of the "knowledge society", that is, knowledge-intensive and service-based; and
- feed into an existing policy promoting media and audiovisual activity as a means of increasing Barcelona's international profile and internal social cohesion.

There is as yet little information available as to the economic impact of the development. All new buildings in the 22@ district have been sold or rented prior to their completion. However, the Barcelona Field Studies Centre has cautioned that 22@ successes have yet to be consolidated and that the complex is currently "more of a project than a reality".[44]

43 http://web.mit.edu/cre/research/ncc/casestudies/seoul.html

44 Barcelona Field Studies Centre, "22@: Update: More a project than a reality", 26 July 2007, available from http://geographyfieldwork.com/22@Update.htm

9.2.4 Sheffield

Sheffield's Cultural Industries Quarter is an initiative geared towards the regeneration of the post-industrial inner-city. Although regeneration of the area began as early as the 1980s, the CIQ was formally launched as part of the Sheffield City Centre Masterplan 2000. The aim of the Masterplan is to leverage activity within the cultural and creative industries, as well as growth in high-technology industries, to ensure Sheffield's ongoing economic development. It is unclear how much has been invested to date.

The project has been taken forward by Sheffield City Council and its purpose-created CIQ Agency, with funding provided by the Heritage Lottery Fund, the Townscape Heritage Initiative and other public-sector bodies. Initiatives include revamping historic buildings and complexes into cultural venue and mixed-use developments providing integrated living and working spaces geared towards creative industry practitioners.

Despite the fact that the project has been taken by the Sheffield City Council, Sheffield's regeneration project is currently lagging behind other post-industrial British towns, such as Manchester for instance. A policy disconnect between the CIQ Agency's efforts and those of wider city and regional development authorities has been blamed for lagging physical regeneration of the CIQ and other target areas.

9.3 Lessons Learned

Upon analysis of the four case studies, a number of points emerged that could be considered pointers for best practice in the development of a Media Quarter. These are summarised below:

- When the Media Quarter is embedded within a larger policy agenda for economic and cultural regeneration via the knowledge economy, as well as the presence of coherent public-sector support measures for the creative industries, this contributes substantially to the successful development of media and creative quarters.
- Similarly, private-public partnerships and private sector buy-in provide much-needed sources of finance, having contributed to the successes of the DMC in Seoul and Barcelona's 22@ district in particular.
- There is a need to capitalise on existing strengths and local skills. Seoul's DMC has benefited from Seoul's reputation for cutting-edge technology and an existing skill pool of digital content companies and high-technology service providers, while Sheffield's CIQ has built upon the city's history as music and cultural hub.
- A concentration of high-profile tenants – such as international corporations, broadcasters, and companies which commission a large volume of content – often acts as a draw to other companies.
- The presence of educational and research institutions within the Media Quarter or in its immediate vicinity is advantageous in that it provides a stead output of skilled labour, thus promoting the creation of local employment, and helps to address existing skills gaps.
- The development of mixed-use complexes incorporating living and working space as well as cultural and entertainment venues are beneficial to Media Quarters' long-term sustainability and organic growth after initial public sector-led infrastructural development. The presence of a variety of tenants within the Media Quarter is similarly critical to Media Quarters' long-term successes.

- Evidence of technological innovation and the provision of cutting-edge infrastructure can also present an advantage in attracting creative talent and international corporations, as evidenced by the case of Seoul's DMC.

Appendix 1. Build Costs

A1.1 Summary cost for three options

Option 1 – Three Centres	Size (sq.m)	Capital Costs (£m)	
		New Build	Conversion
Vision Centre	1963	3.1	2.4
Sound Centre	1775	3.0	2.1
Youth Centre	1425	2.4	1.7
Grand Total	**5163**	**8.5**	**6.2**

Option 2 – Hub and Satellites	Size (sq.m)	Capital Costs (£m)	
		New Build	Conversion
Hub and Satellites	**2850**	**4.5**	**3.3**

Option 3 – Multimedia Centre	Size (sq.m)	Capital Costs (£m)	
		New Build	Conversion
Multimedia Centre	**3500**	**5.4**	**3.8**

A1.2 Capital Costs for Option 1

Option 1 – Three Centres					
NEW BUILD	**No**	**Area (sq. m)**	**Total Area (sq. m)**	**Rate/sq. m**	**Cost**
VISION CENTRE					
Foyer/Lobbies	1	90	90	£1,900	£171,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£2,200	£88,000
Offices	8	25	200	£1,300	£260,000
Staff/storage	2	40	80	£1,300	£104,000
Exhibition Space	2	80	160	£2,000	£320,000
Screen 1 - large	1	350	350	£1,400	£490,000
Screen 2 - small	1	140	140	£1,400	£196,000
Projection	2	25	50	£1,400	£70,000
Artists Spaces	3	30	90	£1,000	£90,000
Bar/Café	1	220	220	£1,500	£330,000
Production etc Space	2	40	80	£1,750	£140,000
Teaching/Activity Space	1	40	40	£1,300	£52,000
Sub-total			1570		£2,353,000
Circulation/plant etc.	25%		392.5	£1,900	£745,750
TOTAL			**1962.5**		**£3,098,750**
SOUND CENTRE					
Foyer/Lobbies	1	90	90	£1,900	£171,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£2,200	£88,000
Offices	8	25	200	£1,300	£260,000
Staff/storage	2	40	80	£1,300	£104,000
Exhibition Space	2	80	160	£2,000	£320,000
Performance Space	1	350	350	£1,800	£630,000
Artists Spaces	3	30	90	£1,000	£90,000
Bar/Café	1	220	220	£1,500	£330,000
Production etc Space	2	40	80	£1,750	£140,000
Teaching/Activity Space	2	40	80	£1,300	£104,000
Sub-total			1420		£2,279,000
Circulation/plant etc.	25%		355	£1,900	£674,500
TOTAL			**1775**		**£2,953,500**
YOUTH CENTRE					
Foyer/Lobbies	1	90	90	£1,900	£171,000
Toilets etc	1	40	40	£2,200	£88,000
Staff/storage	2	40	80	£1,300	£104,000
Exhibition Space	1	80	80	£2,000	£160,000
Performance Space	1	350	350	£1,800	£630,000
Production etc Space	3	40	120	£1,750	£210,000
Café	1	220	220	£1,500	£330,000
Teaching/Activity Space	4	40	160	£1,300	£208,000
Sub-total			1140		£1,901,000
Circulation/plant etc.	25%		285	£1,900	£541,500
TOTAL			**1425**		**£2,442,500**
GRAND TOTAL			**5162.5**		**£8,494,750**

Option 1 – Three Centres					
CONVERSION	**No**	**Area (sq. m)**	**Total Area (sq. m)**	**Rate/sq. m**	**Cost**
VISION CENTRE					
Foyer/Lobbies	1	90	90	£1,000	£90,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£1,500	£60,000
Offices	8	25	200	£800	£160,000
Staff/storage	2	40	80	£800	£64,000
Exhibition Space	2	80	160	£1,800	£288,000
Screen 1 - large	1	350	350	£1,400	£490,000
Screen 2 - small	1	140	140	£1,400	£196,000
Projection	2	25	50	£1,400	£70,000
Artists Spaces	3	30	90	£800	£72,000
Bar/Café	1	220	220	£1,500	£330,000
Production etc Space	2	40	80	£1,500	£120,000
Teaching/Activity Space	1	40	40	£700	£28,000
Sub-total			1570		£2,010,000
Circulation/plant etc.	25%		392.5	£1,000	£392,500
TOTAL			1962.5		£2,402,500
SOUND CENTRE					
Foyer/Lobbies	1	90	90	£1,000	£90,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£1,500	£60,000
Offices	8	25	200	£800	£160,000
Staff/storage	2	40	80	£800	£64,000
Exhibition Space	2	80	160	£1,800	£288,000
Performance Space	1	350	350	£1,300	£455,000
Artists Spaces	3	30	90	£800	£72,000
Bar/Café	1	220	220	£1,500	£330,000
Production etc Space	2	40	80	£1,500	£120,000
Teaching/Activity Space	2	40	80	£700	£56,000
Sub-total			1420		£1,737,000
Circulation/plant etc.	25%		355	£1,000	£355,000
TOTAL			1775		£2,092,000
YOUTH CENTRE					
Foyer/Lobbies	1	90	90	£1,000	£90,000
Toilets etc	1	40	40	£1,500	£60,000
Staff/storage	2	40	80	£800	£64,000
Exhibition Space	1	80	80	£1,800	£144,000
Performance Space	1	350	350	£1,300	£455,000
Production etc Space	3	40	120	£1,500	£180,000
Café	1	220	220	£1,500	£330,000
Teaching/Activity Space	4	40	160	£700	£112,000
Sub-total			1140		£1,435,000
Circulation/plant etc.	25%		285	£1,000	£285,000
TOTAL			1425		£1,720,000
GRAND TOTAL			**5162.5**		**£6,214,500**

A1.3 Capital costs for Option 2

Option 2 – Hubs and Satellites					
NEW BUILD	**No**	**Area (sq. m)**	**Total Area (sq. m)**	**Rate/sq. m**	**Cost**
HUB					
Foyer/Lobbies	1	90	90	£1,900	£171,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£2,200	£88,000
Offices	16	25	400	£1,300	£520,000
Staff/storage	3	40	120	£1,300	£156,000
Bar/Café	1	220	220	£1,500	£330,000
Artists Spaces	3	30	90	£1,000	£90,000
Production etc Space	4	40	160	£1,750	£280,000
Sub-total			1150		£1,677,000
Circulation/plant etc.	25%		287.5	£1,900	£546,250
TOTAL			1437.5		£2,223,250
SATELLITES					
Screen 1 - large	1	350	350	£1,400	£490,000
Screen 2 - small	1	140	140	£1,400	£196,000
Projection	2	25	50	£1,400	£70,000
Exhibition Space	1	80	80	£2,000	£160,000
Performance Space	1	350	350	£1,800	£630,000
Teaching/Activity Space	4	40	160	£1,300	£208,000
Sub-total			1130		£1,754,000
Circulation/plant etc.	25%		282.5	£1,900	£536,750
TOTAL			1412.5		£2,290,750
GRAND TOTAL			**2850**		**£4,514,000**

Option 2 – Hub and Spokes					
CONVERSION	**No**	**Area (sq. m)**	**Total Area (sq. m)**	**Rate/sq. m**	**Cost**
HUB					
Foyer/Lobbies	1	90	90	£1,000	£90,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£1,500	£60,000
Offices	16	25	400	£800	£320,000
Staff/storage	3	40	120	£800	£96,000
Bar/Café	1	220	220	£1,500	£330,000
Artists Spaces	3	30	90	£800	£72,000
Production etc Space	4	40	160	£1,500	£240,000
Sub-total			1150		£1,250,000
Circulation/plant etc.	25%		287.5	£1,000	£287,500
TOTAL			1437.5		£1,537,500
SATELLITES					
Screen 1 - large	1	350	350	£1,400	£490,000
Screen 2 - small	1	140	140	£1,400	£196,000
Projection	2	25	50	£1,400	£70,000
Exhibition Space	1	80	80	£1,800	£144,000
Performance Space	1	350	350	£1,300	£455,000
Teaching/Activity Space	4	40	160	£700	£112,000
Sub-total			1130		£1,467,000
Circulation/plant etc.	25%		282.5	£1,000	£282,500
TOTAL			1412.5		£1,749,500
GRAND TOTAL			**2850**		**£3,287,000**

A1.3 Capital Costs for Option 3

Option 3 – Multimedia Centre					
NEW BUILD	**No**	**Area (sq. m)**	**Total Area (sq. m)**	**Rate/sq. m**	**Cost**
Foyer/Lobbies	1	90	90	£1,900	£171,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£2,200	£88,000
Offices	40	25	1000	£1,300	£1,300,000
Staff/storage	3	40	120	£1,300	£156,000
Bar/Café	1	220	220	£1,500	£330,000
Artists Spaces	3	30	90	£1,000	£90,000
Production etc Space	2	40	80	£1,750	£140,000
Screen 1 - large	1	350	350	£1,400	£490,000
Screen 2 - small	1	140	140	£1,400	£196,000
Projection	2	25	50	£1,400	£70,000
Exhibition Space	1	80	80	£2,000	£160,000
Performance Space	1	350	350	£1,800	£630,000
Teaching/Activity Space	4	40	160	£1,300	£208,000
Sub-total			2800		£4,071,000
Circulation/plant etc.	25%		700	£1,900	£1,330,000
TOTAL			**3500**		**£5,401,000**

Option 3 – One Multi-purpose Centre					
CONVERSION	**No**	**Area (sq. m)**	**Total Area (sq. m)**	**Rate/sq. m**	**Cost**
Foyer/Lobbies	1	90	90	£1,000	£90,000
Box Office	1	30	30	£1,400	£42,000
Toilets etc	1	40	40	£1,500	£60,000
Offices	40	25	1000	£800	£800,000
Staff/storage	3	40	120	£800	£96,000
Bar/Café	1	220	220	£1,500	£330,000
Artists Spaces	3	30	90	£800	£72,000
Production etc Space	2	40	80	£1,500	£120,000
Screen 1 - large	1	350	350	£1,400	£490,000
Screen 2 - small	1	140	140	£1,400	£196,000
Projection	2	25	50	£1,400	£70,000
Exhibition Space	1	80	80	£1,800	£144,000
Performance Space	1	350	350	£1,300	£455,000
Teaching/Activity Space	4	40	160	£700	£112,000
Sub-total			2800		£3,077,000
Circulation/plant etc.	25%		700	£1,000	£700,000
TOTAL			**3500**		**£3,777,000**

Appendix 2. Benchmarking

A2.1 Benchmarking research

Rationale for Case Study Selection

The case study projects were selected on the basis of their similarities with the type of development envisaged in Birmingham, to enable the extraction of lessons in best-practice of greatest relevance to the ongoing development of the Eastside media quarter. The projects all demonstrate the following characteristics:

- They involve the re-development of a discrete quarter within an urban centre;
- They are embedded within wider strategies for urban regeneration based on the creation of creative clusters to harness the social, economic, and cultural returns from the creative and cultural industries, as well as new technologies and new media; and
- They have received considerable public and private investment.

Key Concepts: Creative Clusters and Creative Quarters

Clusters are defined as "geographic concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries, and associated institutions (for example, universities, standards agencies, and trade associations) in particular fields that compete but also cooperate".[45] Among their common attributes are the following:

- They tend to be geographically focussed, often in larger urban centres;
- They involve interaction and exchanges with competitors, suppliers, customers, government line and regulatory agencies, industry and professional associations and university and other R&D organisations; and
- They need to share market-relevant information to keep up to date.

There is little consensus regarding a definition of the term 'creative quarter'. While 'creative quarter' is often used to signify a creative cluster, the two concepts are not necessarily synonymous. Creative quarters can be understood as developments of physical and technological infrastructure catering to creative industries, resulting in the concentration of human skills, business capital and support services requisite for the development of a creative cluster.

In using creative industries to support urban regeneration, roughly three models are used by public policy-makers[46]. These can be broadly defined as:

- The cultural production model, characterised by public investment to stimulate local creative production in order to create employment for instance. This can be conceived of as a supply-led model.
- The cultural consumption model, which can be understood as a demand-led model, whereby city authorities invest in flagship infrastructure and event hosting in order to build a city's image or brand as a cultural/creative centre in order to attract creative professionals. This can be activity-led, with a focus on attracting events such as the Olympics, or seeking accolades such as the title of 'European Capital of Culture' – as in the case of Glasgow – or constructing a hallmark building, such as the Guggenheim in Bilbao.

45 Michael E. Porter, "Clusters and the new economics of competition", in *Harvard Business Review,* Nov/Dec 1998

46 Bianchini 1993 and Garcia 2004, in Luke Binns, "Capitalising on Culture: An Evaluation of Culture-Led Urban Regeneration Policy", working paper for the Futures Academy, Dublin Institute of Technology, 2005

- The community arts-focus model, a more recent and alternative approach. This seeks to promote regeneration from the bottom up, via wide public participation in creative industries and initiatives, rather than by imposing a public policy-led programme of urban rejuvenation. While this model is able to address 'softer' aspects of regeneration, such as social cohesion and identify, it is less useful in addressing the rejuvenation of derelict physical infrastructure for instance.

The case studies presented below incorporate various aspects of these three models to differing degrees of effectiveness. Lessons learned are included at the end of each case study.

A2.2 Germany - Cologne

Overview

- Cologne is Germany's fourth largest city, with a population of just over 10 million inhabitants, and is located in the densely populated region of NRW.
- In 1980, the municipal and regional governments adopted a concerted strategy promoting Cologne as a "Media City". This strategy was intended to transform Cologne into a cutting-edge location for digital telecommunications production. The lead project in Cologne's ongoing development as a Media City was the MediaPark initiative, a project to redevelop an ex-freight depot into a media quarter for film, television, radio and ancillary media services.
- Since the launch of the Media City initiative, Cologne has gone from being one of several media centres in Germany to being the foremost television and media centre in the country.

Key Statistics

- **Dates of development:** The Media City project began in 1980 and is ongoing. Construction of the MediaPark itself started in 1980 and, although scheduled for completion in 1995, was only completed in 2003, having been beset by construction and financial problems.
- **Location:** Northwest of Cologne's city centre
- **Area covered by development:**
  - Original area designated for redevelopment: 200,000m^2 (approx. 50 acres)
  - Extent of development completed in 2003: 175,000 m^2 (approx. 43 acres)
- **Level of investment to date:** Euro 700 million
- **Main investor:** MediaPark Entwicklungesellschaft mbH ("MPK"), a limited company born of a Private-Public Partnership between the municipality of Cologne, the government of NRW, and private investors. The company acquired ownership of the land and the marketing rights for the development in 1991.
- **Sectors targeted:** Television (main medium), film, radio, as well as ancillary services such as media research, management, and consultancy.

Background to the Development

- **Rationale:** Cologne experienced a serious decline in manufacturing and industrial activity in the 1980s. In order to diversify the economy and pull the city out of its financial slump, Cologne's municipal authority, in collaboration with the regional government of NRW, formulated a concerted policy to support the development of Cologne as a "Media City". The MediaPark was at the forefront of this strategy. The objective of building the MediaPark was to develop the infrastructural and technological capacity with which to attract a range of media production houses and related services.

- **Previous industry concentration:** Cologne had a significant media presence prior to the launch of the Media City programme and the construction of the Media Park. The city was already home to Germany's largest regional broadcaster, Westdeutscher Rundfunk, as well as a number of German-language radio stations such as Deutsche Welle (the German equivalent of the BBC World Service) and Deutschlandfund (a national public-service radio broadcaster). In addition, Cologne has a long history as a centre for printed media and publishing. The Media City initiative therefore built on the city's existing strengths in media.

Key Features

- The MediaPark's key infrastructure comprises high-speed data networks and eight groups of architecturally innovative buildings, catering to different media sub-sectors and also incorporating housing. Among the main developments are:
  - The Princedom, a 14-cinema multiplex which premieres international and local film and attracts a large number of visitors to the MediaPark complex
  - The MusicTower, which caters to the needs of the music industry
  - The M7 Publishing house and art and media-focused bookshop
  - Cultural institutes such as the Stiftung Kultur, a culture museum established in 1996, the Literaturhaus and the Stadtsparkasse Köln.
  - The KOMED media and communications institute, which functions as an educational and research institute for a variety of media and communications sectors, a conference and event centre, and additionally houses production and post-production space for film and television.
- In addition to the 4.5 million visitors a year which the MediaPark's facilities attract, the MediaPark now houses a stated 5,000 people working in 250 companies from a broad range of media sectors. Among the companies located in the MediaPark are a significant number of media companies (including BBC Worldwide Germany, Radio Köln, EMI Music Germany), IT companies, and media service providers (including lawyers, management consultants, recruitment firms and public relations). The location of such a range of media production houses and service-providers side by side has enabled MediaPark to function as a self-contained centre of expertise.
- However, the largest corporations, including major broadcasters RTL and Deutsche Welle, are located outside the Media Park itself. In fact, a defining characteristic of Cologne's media sector is the dispersal of its constituent companies around the city centre, rather than their geographical concentration in a particular area of the city.
- The overall effect of the Cologne and NWR strategy, which includes the MediaPark development as well as studios on the urban periphery and the creation of media support bodies, has been strongly positive, with a stated 50,000 additional jobs having been created in the communications and media industries.

Main Drivers of the Development

- The development of private commercial television in Germany, which coincided with the development of MediaPark and the larger push to promote Cologne's development as a Media City. The NRW government allocated regional broadcasting licenses preferentially to broadcasters who relocated in the region, prompting the relocation of broadcasting giant RTL to Cologne from its previous base in Luxembourg in 1992.
- Cologne's municipal authorities have acted in concert with the NRW regional government to create a supportive policy environment encouraging the development of a media cluster in the region. Specific policies have included financial support for media projects and planning in concert with private investors, as well as the creation of a regional film fund, the Filmstiftung

NRW, and the development of networking events, such as the annual Cologne Conference, created in 1991 and now an international broadcasting trade fair.

- The municipal government has also promoted the development of education and training bodies to address a perceived long-term skills gap, and has encouraged the location of these institutions in the MediaPark. Among these are KOMED, the RTL Journalism school, and the Bertelsmann media academy.
- RTL's relocation itself attracted a variety of independent television companies, including VOX, VIVA, SuperRTL and others, as well as a number of private-sector support and facilities companies.
- The municipal government has overhauled the surrounding transport infrastructure, extending the existing public rail network and subway system, and creating new highways linking the MediaPark to Cologne's city-centre.

Lessons Learnt

- Cologne's MediaPark has benefited strongly from being embedded within the municipality of Cologne's larger policy to promote Cologne as a Media City.
- The municipality's policy coordination with the regional government of NRW, as well as concerted policy measures to develop a media cluster in the region, notably including incentives provided to media companies to relocate in the region, have similarly been instrumental in the MediaPark's ability to attract a large number and range of media companies.
- However the strong supportive role which the city of Cologne and the NRW government have played are factors unique to the historical context and public-sector organisation of Germany, and may therefore be difficult to replicate elsewhere.
- The presence and relocation of important broadcasting corporations has provided an additional market impetus for the development of Cologne as a Media City, acting as a draw for independent television companies to locate in the city.
- The MediaPark has succeeded in bringing together a range of media sector companies and service-providers, despite the location of large media concerns outside of the media quarter itself. Hence the geographical concentration of important companies within the MediaPark has not been prerequisite to the media quarter's success in economic terms.
- The location of educational and research institutions within the MediaPark has enabled the quarter to address a long-term skills gap and generate a pool of skilled labour for the media companies located in the media quarter.

A2.3 South Korea – Seoul

Overview

- Seoul is the capital of South Korea and the fifth largest city in the world in population terms, with over 10 million inhabitants.
- The Seoul Metropolitan Government began developing a media quarter called the Digital Media City ("DMC") in Seoul's Sangam-Dong district in 2002, as part of a larger project to develop a media and entertainment cluster in the Sangam New Millenium Town.

Key Statistics

- **Dates of development:** Construction began in 2002 and is due to complete in 2010.
- **Location:** Sangam-Dong district, 7km (4 miles) Northwest of Seoul central business district.
- **Area covered by development:** 550,000 m² (approx. 136 acres)
- **Level of investment to date:** Euro 1.3 billion (1.6 trillion South Korean Won)

- **Main investor:** Seoul Metropolitan Government. Development is being taken forward in partnership with Seoul Metropolitan Development Corporation and the Seoul Business Agency.
- **Sectors targeted:** Multimedia, IT, Entertainment industries, as well as content industries and those which require use of information, communication and media technologies.

Background to the Development

- **Rationale:** The DMC, and the larger Millenium City initiative overall, seeks to build upon South Korea's extant strengths in the multimedia, IT and entertainment industries, which developed following national programmes of service-oriented economic restructuring in the 1960s, and to consolidate South Korea's transition from a manufacturing to an innovation economy. The aims of building the DMC also include promoting Seoul as an east-Asian hub for commerce. In addition, the development is expected to further the economic returns on South Korea's cultural expansion across Asia and, increasingly, the United States and Europe, in the shape of South Korean music, games, animation and day-time television offerings.
- **Previous Industry Concentration:** The Sangam-Dong district previously housed an ecological park, "intelligent" residential homes, as well as the 2002 Seoul World Cup Stadium.

Key Features

- The DMC features cutting-edge technology, such as portable broadband and wireless networks, as well as physical infrastructure catering to the wide variety of the DMC's prospective tenants.
- The objective of Seoul's Metropolitan Government in developing the DMC was not simply to create a new urban centre of product distribution and consumption but rather to foster the development of a locus for new service, digital technology and culture-related industries. To this end the government and planners have set aside land allotments and different zones catering to a mix of tenants. These include business zones for entities such as digital media R&D firms; entertainment and media production companies; digital media technology companies; and digital broadcasting centres; but also space for schools and university campuses, residential housing, commercial and convention facilities, and entertainment zones. In addition the DMC's physical area has been separated into a number of zones in which different media sectors are to be concentrated. These are the Experimental Park; the IT-Art Park; the Media Plaza; and the Exhibition Plaza.
- A major feature of the project is Digital Media Street, the DMC's main causeway and its organisational spine, linking the various different districts. It will host entertainment and retail establishments, technology companies, prestige housing, R&D institutions, and universities. The Digital Media Street was designed by a team of MIT urban designers and Seoul researchers, and is intended to function as a living laboratory environment to promote the public's interaction with the DMC environment via digital displays and the provision of digital technology services.

Main Drivers of the Development

- The DMC builds on the innovation and market strength of more than 10,000 small-scale Internet, game, and telecommunication firms already located in Seoul. Seoul is also the location of Intel's research and development centre, which was established in 2004 and which focuses on digital content innovation and cross-platform digital delivery.
- The DMC must be seen within the context of the South Korean government's concerted efforts to turn South Korea into the world's foremost knowledge-economy. The South Korean government has consistently provided a regulatory framework encouraging competition among digital content providers and has ensured that cutting-edge digital infrastructure has been

created throughout the country. South Korea's population of "netizens" is widely acknowledged as ranking among the world's most internet and technology-savvy populations.
- Initial metropolitan government funding has been used to leverage the involvement of private technology partners and developers.
- The metropolitan authority is revamping the transportation infrastructure linking DMC to Seoul's city centre. As part of the Seoul Development Institute's 10-Year Urban Rail Transit Master Plan (2007-2010), extensions to Seoul's existing light rail transit system are expected to link the DMC to the central transit system by 2016.
- The metropolitan government hopes to attract tenants to the DMC via its provision of tax incentives and favourably-priced land for particularly desirable tenants. These are expected to act as "magnets", attracting other firms to the area thanks to their business relationships and because their presence brands the area as a prestige location.

Lessons Learned

- A joined-up media-oriented strategy, supportive policy environment and an existing skills base have been key to the successful development of the DMC.
- Seoul's flagship digital infrastructure and international reputation for being among the world's technological avant-garde, as well as the pan-Asian popularity of South Korea cultural products, have enabled the city to build a global brand which has been advantageous to the DMC's development (and to which the DMC is expected to further contribute upon its completion).
- The cutting-edge technological innovation and interactive digital offerings, particularly those on the DMC's Digital Media Street, have added to the profile of – and international interest in – the DMC development.
- The Seoul Metropolitan Government's allocation of preferential land prices to particularly high-profile companies is expected to attract other companies to the DMC via their existing business relationships and the prestige value which they will impart to the site.

A2.4 Spain – Barcelona

Overview

- Barcelona is the capital of Spain's Catalunia region and has a population of approximately 1.5 million people. However the Barcelona area encompasses 37 towns which are home to upwards of 3 million people.
- As part of a wider strategy for Barcelona's metropolitan development, and within the context of a series of town-planning initiatives, Barcelona launched the 22@ plan in 2000 to transform the post-industrial neighbourhood of Poblenou into "an innovative district offering modern spaces for the strategic concentration of intensive knowledge-based activities". The initiative is intended as both an urban rejunevation and refurbishment project and as a more ambitious initiative to develop a new city model in response to the economic and social realities of the "knowledge society".[47]

Key Statistics

- **Dates of development:** The 22@ plan was launched in 2000 and is scheduled for completion in 2008.

47 Pla 22@ - Barcelona City Projects, Municipality of Barcelona,

- **Location of development:** Poblenou, a post-industrial quarter to the West of Barcelona's city-centre.
- **Area covered by development:** 200 000 m² (approx. 200 acres)
- **Level of investment:** Euro 162 million invested to date, of a total of Euro180 million public funds set aside for the strategy.
- **Main investor**: Barcelona City Council, in partnership with a range of public and private investors.
- **Sectors targeted:** Media, ICT, biomedicine and energy have been identified as priority sectors, but 22@ also seeks to identify other knowledge-intensive services and activities (including research and teaching, design, publishing, and "culture").

Background to the Development

- **Rationale:** Barcelona experienced a strong economic slump from the 1960s to the 1980s, in line with the degradation and obsolescence of its industrial quarter. In order to rejuvenate the city's economy, the municipal authorities therefore adopted an overarching policy promoting knowledge-intensive economic activity. The strategy's stated objectives also included increasing the city's international profile and its internal social cohesion. The media and audiovisual sectors were identified as priority sectors for Barcelona on the basis of their economic dynamism and cultural significance.
- **Previous Industry Concentration:** Previously an industrial area with informal housing, whose tenants have only recently been legally recognised by the city of Barcelona.

Key Features

- The 22@ strategy involves seven different but partially overlapping initiatives and key areas of focus. These are:
  - 22@media seeks to draw together the primary public and private bodies working in the audiovisual sector within a multi-disciplinary reference centre. The main components of the strategy are the development of the Barcelona Media Park, featuring a Communication Campus affiliated with Barcelona's Universitat Pompeu Fabra and providing audiovisual training, research and production facilities, and the Audiovisual Production Centre, to feature production sets, technical facilities and office space. 22@Media also includes plans for a Media Innovation Centre and an audiovisual business incubation scheme.
  - 22@ICT involves a number of projects to develop Barcelona's ICT facilities and attract international investment in research and development for ICT. Among these are the construction of an industry services centre (the Technology Centre), an ICT dissemination forum (the ICT House), an Interface Building regrouping ICT SMEs, and the launch of initiatives such as Living Lab (a platform of private and private companies to innovate and launch new mobile technology) and the ICING (Innovative Cities for the Next Generation) Project, an international project involving the municipal authorities of Helsinki, Dublin, and Barcelona to pioneer a new model of city.
  - 22@biocorporation seeks to create and attract biotechnology companies to Barcelona. To this end the strategy involves providing support to biomedical companies transitioning out of their incubation period, as well as the creation of a Biomedical Research Park and a Science Park providing research and development facilities to these companies and fostering synergies between established and new companies.
  - 22@campus involves the development of the Barcelona Technology and Business Campus, a joint venture on the part of the province of Catalunia, the Barcelona and Sant Adria del Besos City Councils and the Barcelona City Council and providing research and development, education, and business facilities for energy, mobility and water technologies

  as well as architecture and urban planning. The Campus will also house a new Industrial Engineering School.
  - 22@entrepreneurs involves the launch of a number of initiatives for the incubation and development of new businesses from initial incubation to finance services, tutorship and consultancy. The strategy includes housing space for new entrepreneurs. It is being developed in partnership with the Barcelona Regional Development Agency and the Polytechnic University of Catalunia.
  - 22@technology supports the creation a number of technology centres including the ALSTOM Technology Research and Development Centre, the Barcelona Media Innovation Centre, the ICT Technology Center and the Graphic Arts Technology Centre. It is being developed in collaboration with the Network of Technology Centres and the Centre for Innovation and Business Development.
  - 22@poblenou comprises a series of social initiatives to promote the skilling-up of Barcelona's population in digital technology and media. The initiative involves the creation of an 22@ Association of (participating) Companies and Institutions, to facilitate cooperation between participating companies and provide support services, and the launch of the Poblenou Digital initiative – which aims to foster the knowledge and use of new technologies among Poblenou's population – as well as the Educational Project – geared towards providing training for young people in secondary schools.
- The six publicly-funded infrastructural development plans outlined above (the 'soft' 22@poblenou initiative notwithstanding) account for the development of roughly 53% of Poblenou's surface area. The remainder of the development is being undertaken according to a number of public and privately-funded plans, 70 of which have been approved by the Barcelona City Council to date. These schemes are designed to encourage not only the growth of knowledge-based commercial sectors but also promotes using the 22@ space for housing and education in order to promote the organic growth of innovation and culture.
- Since start up, more than 250 new companies and institutions have become tenants, of which over more than a half correspond to one of the four priority sectors for the 22@ plan (media, ICT, biomedicine and energy). All new buildings in the 22@ district have in fact been sold or let prior to their completion.

Main Drivers of the Development

- The 22@ strategy is embedded within a larger range of town-planning projects and a municipal policy designed to consolidate and extend Barcelona's economic development in the context of the knowledge economy – that is, to promote knowledge-intensive economic activity, with a particular focus on media communications and technology - and to foster the city's urban renewal via the development of these industry sectors. Among these projects is the Delta Plan, which aims to turn Barcelona into southern Europe's foremost logistics and distribution zone, and the creation of a Forum area, to host high technology convention centres and auditoriums and a marina port.
- Fundació Barcelona Media, a non-profit foundation, has been set up to perform research and support innovation and training for the media industry. Public support projects include:research into media production technologies, content management, content business models, network technology, urban management and many others. The Fundació also spearheads the Barcelona Media Park which aims to bring together main public and private agents of the audiovisual sector with a focus on innovation, higher education, media incubation and residences for entrepreneurs and professionals related to the communication sector will come together.
- Due to a shortage of available land in Barcelona, it is believed that half of new office space in Barcelona will in the future be concentrated in the 22@ district. However, investment consultants Cushman Wakefield Healey & Baker and the Barcelona Field Studies Centre have

warned that 22@ has yet to consolidate its successes, and that the complex is as yet more of a project than a reality.[48]

- Furthermore, the collapse of the dot-com bubble in March 2000 has had a negative impact on the growth of the 22@ district, leading observers to speculate that the area will represent a concentration of service industries and office space, rather than technology-intensive content companies.[49]
- Nonetheless, the 22@ strategy has succeeded in securing a number of high-profile and technology-oriented tenants. For instance, Yahoo!'s has established its first research location in Europe in the Barcelona Media Park. The Research Centre is to operate in association with the Barcelona Media Innovation Center and will concentrate on research in the areas of Web search and mining, harnessing the strengths of the European academic search community through collaborations and joint projects. In addition, the shared service centres of General Motors, T-Systems, and Diamond Cluster have all set up shop in the 22@ area.

Lessons Learnt

- The support of Barcelona's municipal government, via public investment in infrastructural development and an overarching policy of fostering public-private partnerships have been critical to 22@Barcelona's successes to date. The seven strands of the 22@ initiative have been spearheaded by the City Council with the buy-in and partnership of a variety of local and regional authorities, development agencies, and educational and research institutions. The creation of such an integrated and coherent strategy has been critical to the 22@ initiative's early successes.
- The 22@ strategy has been geared towards securing a mix of tenants which includes production houses, ancillary service providers, R&D and educational bodies, but also private residents, in order to encourage an organic process of cultural rejuvenation.
- The location of "magnet" tenants such as Yahoo! Research Europe and high-profile multinational corporations in the 22@ area has raised the initiative's profile.
- Encouraging collaboration between public and private sectors, in both R&D and commercial ventures, has contributed significantly to the success and rate of regeneration.

A2.5 UK – Sheffield

Overview

- Sheffield is a city located in the South Yorkshire region of England, with a population estimated at 520,700 in 2005.
- The Sheffield City Council adopted an official policy of supporting the culture and media industries as an engine for regeneration in the mid 1980s. The Cultural Industries Quarter (CIQ) in the city's centre has since emerged as a creative community of artists, musicians and film-makers in a post-industrial district of Sheffield's inner city.
- Sheffield City Council subsequently elaborated a strategy incorporating the continued development of the CIQ within the larger Sheffield City Centre Masterplan 2000. This out a comprehensive strategy for the economic, physical, social and cultural changes to provide the basis for sustainable investment and growth over the coming decade. The Masterplan proposed a programme to meet the following goals, among others:

48 Barcelona Field Studies Centre, "22@: Update: More a project than a reality", 26 July 2007, available from http://geographyfieldwork.com/22@Update.htm

49 Barcelona Field Studies Centre, "22@: Update: More a project than a reality", 26 July 2007, available from http://geographyfieldwork.com/22@Update.htm

- Building a new high-technology based economy;
- Creating a vibrant city as a centre for learning, culture, retail, business, leisure and living; and
- Improving accessibility to the city centre by all modes of transport[50].

Key Statistics

- **Dates of development:** Ongoing since the 1980s. City Council programme of improvements started in 2000 and is ongoing.
- **Location of development:** Sheffield inner city.
- **Area covered by development:** 244,000 m² (85 acres)
- **Level of investment:** [data]
- **Main investor:** Sheffield City Council, but delivered by **t**he Creative Industries Quarter Agency (CIQ Agency). Also Central Government via regional development agency Yorkshire Forward, as well as Heritage Lottery Fund, Arts Council England, and a range of private-sector investors and educational institutions.
- **Sectors targeted:** Creative industries as defined by the Department for Culture, Media and Sport. Includes advertising, film and video, architecture, music, art and antiques markets, performing arts, computer and video games, publishing, crafts, software, design, television and radio, and designer fashion.

Background

- **Rationale:** In order to address the infrastructural and socio-economic downturn engendered by the decline of the steel and other heavy industries from the 1970s on, the City Council has built upon Sheffield's history as a cultural location to promote culture as an engine for regeneration.
- **Previous industry concentration:** None in the CIQ area itself. Sheffield is focus of the creative industries in South Yorkshire and has a legacy as a creative location, notably for music.

Key Features

- A stated 300 organisations employing around 3,000 people in a range of cultural activities including film, TV, video, radio, photography, media, new media design, music and performing arts, fine art and traditional crafts, are now located in the CIQ.
- A number of initiatives have been developed by the CIQ Agency since 2000. These developments are guided by a Quarter Action Plan. Among the recent developments are:
  - The Cube live/work project, undertaken in partnership with the Regional Housing Board and Derwent Living. The object of the initiative is to broaden the working and living options for people living in the CIQ and thereby contribute to new business creation and growth in the quarter. The Cube project offers a series of live/work units complete with high technology.
  - Plans to restore and convert historical industrial buildings to preserve and enhance Sheffield's industrial heritage.
  - The conversion of the former bus depot to mixed-use development with a high student accommodation component to strengthen the relationship between the CIQ and Sheaf Valley Quarter, another quarter under redevelopment according to the Masterplan 2000 programme.
  - The development of Persistence Works, the UK's first purpose built artists' studio complex, which houses the premises of, among others, the Yorkshire ArtSpace Society.

50 Sheffield City Council's website on the Sheffield City Centre Masterplan 2000, http://sccplugins.sheffield.gov.uk/urban_design/master_plan.htm

  - A revamp of Sheffield's mass transit system, in particular the improvement of the Railway Station, to strengthen the CIQ's transport ties to Sheffield's city-centre.
- The CIQ Agency also provides support services to the creative industries located in the CIQ, including public relations, event management services, and ancillary activities such as retailing, catering and leisure.

Main Drivers of the Development:

- The CIQ Agency was set up by the Sheffield City Council in 2000 as an arms-length body to drive the CIQ strategy and maximise its growth potential, as well as to promote the growth of the cultural and creative industries in the Yorkshire and Humber region more generally. The CIQ Agency's stated objectives are:
  - To put the CIQ on the creative and cultural industries map, thereby establishing Sheffield as a major creative city;
  - To encourage appropriate property and environmental development through partnerships with developers, investors, local businesses and other Sheffield development agencies;
  - To enable the CIQ to become an economically and socially dynamic district where people work, live and relax;
  - To support the needs of the Quarter and the people and organisations within it;
  - To develop projects which engage businesses, communities and young people and grow the sub-regional creative and digital economy.
- There is a strong graduate output from local universities as well as a strong educational presence in and around CIQ, hence a local skill pool for the creative and cultural industries. A new School of Drama and Music Technology has recently been developed adjacent to the CIQ, complete with theatre for showcasing new creative talent. Sheffield's Hallam University has also spearheaded a large number of creative initiatives within the CIQ.
- A joined-up strategy to renew Sheffield's public transport and transportation infrastructure dovetails with more specific plans to connect the CIQ to the city centre. Initiatives such as "Connect Sheffield", which seeks to create a more legible and navigable urban environment by rationalising road signs for instance, complement the downgrading of the highways which currently sever the CIQ from the rest of the city centre.
- A range of internationally renowned events and animation activity, such as the lovebytes New Media Festival and the International Documentary Film Festival, is raising the profile of the CIQ and the creative drive of Sheffield. These activities will be showcased in the studios, galleries and venues orientated around the quarter's pedestrianised core at Paternoster/Brown Street and Arundel Street.

Lessons Learnt

- Despite careful planning, there is a policy disconnect between the CIQ Agency and the mainstream of Sheffield City Council's policies, and consequently those of other regional partners, such as the Regional Development Agency, illustrates the need for a coordinated policy directive and wide stakeholder buy-in for cultural regeneration to be fully effective.
- Sheffield's physical regeneration has lagged behind that of other Northern post-industrial cities, such as Manchester, which has hindered the city's emergence as a cultural and creative location. This highlights the importance of combining cultural regeneration initiatives with wider cultural and physical rejuvenation.

Appendix 3. Mapping of Eastside

1 SPI's Approach

- Understanding how the landscape of Eastside has been shaped by various policies and strategies is essential to this study. To do so SPI embarked on a process of discovery of key historical and current initiatives pertinent to this study. The results of this are presented below grouped accordingly: Physical infrastructure; Policy/ Political initiatives; Economic/Business strategies; social and cultural initiatives.
- Our findings reveal that a number of initiatives have been implemented, both across Birmingham city and specific to Eastside, that impact on the development of a Media Quarter. Desk.
- Research to date has revealed over 40 initiatives and policy documents that directly or indirectly impact on the development of a media quarter in Eastside. SPI has examined these initiatives and identified a number of them to be of particular relevance to this work.

2 Physical Initiatives

- Eastside is Birmingham's largest physical regeneration project transforming 170 hectares[51] of land adjoining the Birmingham city centre with an aim to expand the city centre. Core Eastside investments and developments include:
  - Eastside City Park
  - Masshouse (McLeans Sites 3 & 7)
  - City Park Gate –
  - Martineau Galleries
  - Learning & Leisure Quarter and Millennium Point
  - Learning Quarter (including Matthew Boulton College)
  - Ventureast
  - Curzon Gate/Park
- other physical initiatives are also listed under this heading.

3 Eastside City Park

- Eastside City Park will be Birmingham's first new major city centre park. It covers eight acres in Eastside bordering on Curzon Street Station and Millennium Point and stretching from the Digbeth Branch Canal through to the Bullring development.
- The park has specific design requirements, it should accommodate wildlife rich spaces with trees and plants and the park should be a model for current best practice in landscape design, construction and maintenance. The park should be a centre of culture, life and activity, stimulating experiences and encouraging social interchange, a heart of artistic life and a cultural hub.
- As proposals have taken shape, the development of the park has been steered by the city council in association with CABE Space, the government adviser on parks and open spaces, in conjunction with stakeholders and other advisory organisations.
- City Park is currently on round two of a bid for the Big Lottery Fund Living Landmarks competition for an approximate total of £25 million.

51 Source: http://www.birmingham.gov.uk

4 Masshouse (McLeans Sites 3 & 7)

- Masshouse Developments Limited is a partnership between the David McLean Group, Nikal and the Royal Bank of Scotland. The scheme represents an investment likely to exceed £350 million, and create an expected 2,600 jobs.
- The Masshouse development is taking shape on the first of the sites created after the demolition and clearance of the elevated Masshouse Circus and the construction of a tree-lined boulevard leading from central Birmingham into Eastside. It is close to Birmingham's Bullring shopping centre and minutes away from the city's traditional commercial centre.
- The Masshouse scheme is to be a mixed-use development (a mix of residential, commercial, retail and leisure). The residential element of the investment will include apartments, the first new homes to be created in Eastside, aiming to create a community of over 550 new residents and 4,000 office workers.
- The McLeans site 3 will be residential and site 7 will be mainly office based. CPOs have been issued for the land.

5 City Park Gate

- City Park Gate is the second stage of the Masshouse development using the land cleared by the demolition of the elevated Masshouse Circus and the creation of the Moor Street Queensway bus mall.
- This scheme is a mixed-use 2.23 hectares (5.75 acres) development to be built by Countryside Properties and Quintain in Eastside. City Park Gate is a joint venture between Birmingham City Council, Countryside Properties and Quintain Estates and Development plc. The £100 million scheme is intended to be an example of sustainable city centre development and high quality design, with the prospect of 730 jobs being created. It is expected that the City Park Gate development will include residential space, office accommodation, and a major store.
- Demolition for City Park Gate is scheduled to take place in 2008.

6 Martineau Galleries

- Martineau Galleries is another Eastside development opportunity created from the removal of the Masshouse Circus. The 5.6 hectares (14 acres) redevelopment of the Toys R Us store, and the Priory Square Shopping Centre is intended to create a mix of retail, leisure and office uses, as well as residential elements at the junction of High Street, Bull Street and Dale End.
- The proposed mixed-use site will also include a residential tower, a major department store, car parking facilities, and opportunities for entertainment and cultural uses. It is expected that open spaces and a new public square, inspired by examples like Covent Garden, will be part of the site. This aims to enable people to move freely through and around the site.
- Outline planning consent was granted on 30 March 2006 and work on Martineau Galleries is currently scheduled to begin in 2008.

7 Learning & Leisure Quarter and Millennium Point

- This £114 million development designed by Grimshaw & Partners was one of the Millennium Commission's regional landmark projects to celebrate the new millennium. Opening in September [2001], the Millenium Point was the first major new development in Eastside.
- The Learning and Leisure Quarter is home to a range of educational establishments, including a number of University of Central England schools, South Birmingham College, Matthew

Boulton College (completed in 2006), Aston University and the New Technology Institute, and expanded facilities for Aston Business School and the Academy of Life Sciences.

- The learning quarter encompasses these learning institutions and organisations in the existing area around Millennium Point.
- Funding for Millennium Point included the maximum lottery grant of £50 million from the Millennium Commission, £25.6 million from the European Regional Development Fund and £5.9 million from Advantage West Midlands, plus a commercial bank loan and sponsorship. Founder sponsors of Millennium Point are Specialist Computer Holdings, GPU Power, Jaguar, Dunlop, HSBC and Severn Trent plc.
- Millenium Point has been built to encourage science, technology and education in Birmingham and the wider region. It houses a number of organizations and facilities including The University of the First Age; the Young People's Parliament, and commercial leisure, retail and office space around a public mall – the hub with the two largest being Thinktank (museum & science attraction) and an IMAX cinema.
- The Technology and Innovation Centre, part of UCE, is home to Film Production and Television Production and hosts Research and Development Courses and business activity in multimedia mobile technology.

8 Ventureast

- Ventureast is a £45million development in Eastside set to create 5,000 jobs. Ventureast is being developed by Arlington Securities, an investment management and property development business and is a technology led scheme with an extension of Aston Science Park and offices for SMEs.
- The aim is to bring forward a 1 million sq ft high quality, sustainable mixed-use scheme, which will boost the regeneration of Eastside. The site itself covers 6.25 hectares and has been put together as part of a £57.3m joint venture between the City Council and AWM. The proposed mixed-use scheme aims to anchor the proposed Learning and Leisure Quarter and the City Park, and aid the integration of Millennium Point as part of the city centre.
- Development work on Ventureast is in its early stages, having commenced in early 2007.

9 Curzon Gate

- Curzon Park was purchased by Grainger Trust PLC and Development Securities for £33.5 million with an expected development value of £350 million.
- An outline planning application was submitted in July 2007 for a mixed-use development consisting of large offices with the scope to accommodate big businesses, residential, a hotel, retail, medical, leisure and parking. Development will be phased over ten years. Construction is expected to begin in early 2008.

9a Curzon Gate

- Curzon Gate is situated on the former site of the Castle Cement works in Eastside and is adjacent to the Branch Canal. It is part of the former Parcelforce site and is being developed by Eastside Partners.
- The site will contain 260 private residential dwellings and up to 750 student units in a canal-side setting. Contemporary buildings will include a number of affordable housing units situated above a two-storey car park.

- Curzon Gate should feature a range of other amenities including a café, a gym and retail facilities and include a public open space (Curzon Park). The Curzon Gate/park scheme is currently at outline planning application (March 2007).

10 Warwick Bar

- Warwick Bar has a rich canal side industrial heritage. The site includes bridges, locks, warehouses, canal offices basins and other buildings, which provide the potential for reuse for sensitive mixed-use development (The proposed uses for Warwick Bar include: a film centre and auditorium, an art gallery of international stature, a hotel, up to 600 new homes, flexible business space cafes, bars, shops and restaurants). ISIS has three listed buildings and is in the very early stages of development.

11 Typhoo Basin

- Typhoo Basin is focused upon the Bordesley Canal Wharf where the Digbeth Branch Canal used to extend through to Bordesley Street. Typhoo Basin is the setting for two large factory buildings, which front onto Bordesley Street. Both are locally listed and within the Warwick Bar Conservation Area. There is the opportunity to extend the canal basins to create additional water space and to establish residential and visitor moorings in the area[52].

12 DEP International (UB40 Studios)

- This development is being carried out by Concept Solutions.
- The original, residential led scheme for this site has received planning approval for expansion to include the studios.

13 The Custard Factory

- The Custard Factory covers 20,234 sq m of space and is home to a community of artists and small creative enterprises. Devonshire House is a Grade Two listed building, fronting onto Digbeth High Street, for which The Custard Factory has secured a grant from AWM to refurbish the building to provide workspace and studios for small businesses
- Bennie Gray has also acquired buildings on the corner of Floodgate Street and Fazeley Street / Liverpool Street.
- The UCE is currently in discussions to locate ARTicle there. This is a collaborative strategic project with Arts Council WM reflecting a range of contemporary arts and media practice; collaboration with artists and artists led groups in the city and the region; collaboration within Eastside and other UCE resources and links with artist residency and international projects. The project will be focused on a flexible exhibition and workshop space including a dark space for video installation. The total space will be 3,000 sq feet.

14 Birmingham Unitary Development Plan (UDP) now subsumed under the Local Development Framework (LDF)

52 Source: City Centre Canal Corridor, Development Framework (April 2002)

- The UDP contains policies and proposals to guide the development and the use of land in Birmingham up to 2011. Birmingham's most recent UDP was adopted in 1993 then reviewed in 2000 and 2005.
- A new national planning system came into effect in 2004 requiring Local Authorities to maintain a Local Development Framework (LDF). The LDF would deal with a variety of plans and include existing plans such as those formerly covered under the UDP.
- BCC's development plan also takes into consideration the Regional Spatial Strategy. Other plans will be included as they are created.

15 The Birmingham Needle

- This was a development proposal of the Screen West Midlands and the Birmingham Needle Group in 2003
- It put forward the concept of a tall structure to act as an icon for the creative industries.
- The building was to be located in Eastside close to Curzon Street Bridge and would contain managed accommodation, a cinema, bars and commercial and education workspaces
- This proposal was not realised possibly due to lack of funds.

16 Policy/ Political initiatives

- Listed here are:
  - East Birmingham and North Solihull Regeneration Zone – Implementation Plan 2006-09
  - Birmingham Economic Strategy – 2005-15;
  - Community Strategy 2004-10;
  - Scoping Study: Support Structures for the Creative Industries in the West Midlands, 2004;
  - Creative Cities Strategy – 2002/3;

17 East Birmingham and North Solihull Regeneration Zone – Implementation Plan 2006-2009

- The objective of this plan is to enhance the economic competitiveness of the zone by facilitating the physical development opportunities to support business development and the expansion of inward investment
- this will be achieved through seven strategic investment plans. One of these focuses on Eastside and Digbeth.
- The Eastside and Digbeth Growth Through Enterprise Strategic Development Plan encompasses and extends beyond the learning and leisure quarter emphasis on supporting enterprise and expanding the Creative Industries
- Approximately £40million of AWM funds has been earmarked for this plan and it is hoped that this sum will be matched by £130m from other sources

18 Birmingham Economic Strategy: 2005-2015

- BCC's Economic Strategy builds on the previous strategy formulated in 1998.
- Eastside is identified as a key factor in the City's vision for future economic and employment growth

- It views Eastside as based around the themes of learning, technology and heritage, with the potential to add to the City's tourism offer.
- The key object for Eastside in this strategy is to "attract investment and employment opportunities to Eastside through the development of clusters of creative activity in a Learning, Technology and Heritage quarter, thereby regenerating the eastern side of the City Centre"**.**

19 Community Strategy 2004-2010

- The Birmingham Strategic Partnership's Community Strategy is a plan borne out of public consultation. It aims to put forward a framework to improve the economic, social and environmental well-being of the city till 2010.

20 Scoping Study: Support Structures for the Creative Industries in the West Midlands, 2004

- To ascertain the level of support available to creative industries the Advantage West Midlands and Culture West Midlands commissioned a scoping study in 2004.
- The study identifies a "wealth of support that is available to the creative industries in the West Midlands regardless of location or creative sector". It points to a "healthy level of interlinking" between the various support initiatives. Support covers finance, capacity building, and strategy advice and training.
- Overall more technological industries of Film & Video, Interactive Leisure Software, TV & Radio, Software and Computer Games receive a high level of support when compared with the Advertising, Art & Antiques Market, Designer Fashion and The Performing Arts.
- The Study made several recommendations, which included the need for the West Midlands creative programmes to have more more policy and strategic links with the UK's Creative Economy Programme at the national, regional and sub regional levels. The study also pointed to the need for a needs analysis into the demand side of creative business and beneficiaries of services in the West Midlands.
- Birmingham and Solihull was identified as the key centres of support structures for creative industries.

21 Creative Cities Strategy 2002/3

- This strategy was conceptualised by the Birmingham City Council in 2002 and updated in 2003 via the document called the Creative Development Plan. This document identified the weakening competitive position of manufacturing, the need to diversify and the recognition of the creative industries as a high growth sector across the UK.
- It focused on taking Birmingham in new directions in business capability and building talent and expertise through learning with the aim to become the UK's second city for creativity and innovation and a true European City of Culture by 2008. It was hoped that this strategy would consolidate Birmingham's UK and international role in creative industries.
- It formalised the BCC intent to position the Creative Industries at the heart of the regeneration agenda to be developed in collaboration with BCC strategic partners Advantage West Midlands, Business Link, Learning & Skills Council, the Arts Council, West Midlands and others.
- The strategy envisaged introducing these new directions via 10 major projects. Of particular relevance is 'Project 2: Eastside as a Cultural Quarter' which would focus on screen based media and music;

22 Economic/Business strategies

- Listed here are:
  - Digital Central;
  - Screen Media Lab;
  - Film Birmingham;
  - Digital Birmingham;
  - Marketing Creative Birmingham;
  - Marketing Birmingham's W1;

23 Digital Central

- This is a consortium initiative funded by the AWM that aims to secure national recognition for West Midlands' digital media and music industries. Partners include: UCE Birmingham Screen West Midlands, Maverick Television, Hi8us Midlands and Channel 4, Ideas Factory West Midlands. Digital Central is hosted by UCE at its Screen Media Lab premises in Eastside.
- It is organised into three themes that are networking, showcasing and innovation.
- It supports entrepreneurial culture for digital media and music.

24 Screen Media Lab

- This is part of the UCE Birmingham's Department of Media and Communication. It supports enterprise and innovation in screen media
- and visual design. The centre offers screen, sound and post-production equipment, including High Definition equipment and an audio suite.
- It houses a number of projects including Digital Central.
- It is located in Digbeth, on Heathmill Street.

25 VIVID

- VIVID is an independent exhibition space, and has been located in Eastside since April 2005.
- It focuses on media arts and provides research, production and exhibition facilities on Heath Mill Lane, Digbeth.

26 Film Birmingham

- A BCC led initiative, Film Birmingham has only been active since 2006.
- Film Birmingham supports film and television projects in production in Birmingham
- Film Birmingham is has actively supported a digital agenda. This has involved a Digital Film Event planned for 2008. A 3-year business plan has been commissioned for this event.

27 Digital Birmingham

- Digital Birmingham is a city wide collaboration between the BCC and BT to encourage citizens and businesses to exploit the benefits of digital technologies (such as computers, the Internet, mobile phones, digital television etc). It is seen a one more step to Birmingham's goal to become a leading European digital city.

28 Marketing Creative Birmingham

- This study was commissioned by the Birmingham Creative Partnership Board in 2004 to develop a marketing framework for creative Birmingham to "raise the profile of the creative and cultural industries in the context of its stated mission to position Birmingham as the leading regional capital for the creative industries by 2008".
- The Eastside development was one of the areas focused on in the study. Their research: points to:
  - respondents seeing the presence of iconic buildings and landmarks as important to Eastside's success.
  - "little detail to the vision of Eastside as a creative based quarter"
  - key offer of Birmingham is its breadth, depth, range and diversity. However, this also represents a problem. It is difficult to discover and reach all creative

29 Marketing Birmingham's W1

- W1 is supported by the BCC and co-financed by NEC Birmingham and Marketing Birmingham. It is a physical office set up in London to market the city to key industry players and enable Birmingham reach key policy decision-makers.
- It focuses Birmingham's strategy on attracting inward investment

30 Social and cultural initiatives

- Listed here are:
  - First Light Movies;
  - Curzon Street Station Pre-Feasibility Study;
  - Film Centre
  - Midlands Creative Arts and Digital Media Academy
  - Lower Eastside Dialogues

31 First Light Movies

- First Light is a UKFC funded nation-wide initiative that provides funding and expertise to enable young people aged between five and 18 to create short digital films. It has been running since 2001 and is one of the only organisations of its kind and has a strong focus on working with young people from all backgrounds, including some of the most disenfranchised children in the UK.
- The organisation delivers initiatives with the help of local partnerships around the UK, and works with young people from schools, youth groups, film clubs.
- The organisation is leading the consortium of organisations charged with managing the government's Youth Media Fund (Media Box), worth £6 million and due to run till 2008. This funding comes out of the government's Youth Matters agenda, whereby the treasury has pledged to improve the image of young people in the UK.
- First Light is based in Eastside, and has a satellite office in London.

32 Lower Eastside Dialogues

- Lower Eastside Dialogues is a series of events aiming to set the agenda for the emerging learning and cultural quarter over the next three months.
- The Dialogues will be explored themes of Urban Design, Digital Cities and Heritage and will keep the Eastside at the forefront of creative and learning environments and push the boundaries of what can be done in the development of Birmingham's cultural quarter.
- The Dialogues have succeeded in bringing together innovative thinkers and individuals involved in all aspects of the creative industry, to define the vision for Eastside.

33 Creative Networks

- The Creative Networks[53] at the Technology Innovation Centre (tic) brings all parties involved in screen-based media in the West Midlands together. This includes the diverse and often disparate creative companies, freelancers and associated businesses in the region.
- Creative Networks seeks to promote successful business development and collaboration, and long term sustainability through knowledge and use of innovative technologies and creative practices.
- Regular monthly face-to-face networking events are held at tic. These events offer opportunities for companies to network and make pitches, detailing the resources they are seeking or the projects and challenges they are planning.

32 Digital Event and Festival Showcase

- This proposition is in consultation phase. It will draw together digital and film activity from around the city and region. The focus will be on content creation and consumption.

34 Curzon Street Station Pre-Feasibility Study

- Commissioned in 2006 by the BCC, this study explores opportunities for a 'state-of-the-art centre for image-based digital media equipped with archive, exhibition and cinema facilities for media consumption, production and research, reflecting the diverse needs of Birmingham's communities and media industry' to be housed in the Curzon Street Station.
- Envisions new technologies to encourage creativity, enterprise and innovation. It will provide residents and visitors to the centre, with new range of experiences.
- Sees the Curzon Street Station as an "international centre for image culture, providing a focus for moving image production, screening and education for the region".
- bring together the interests and needs of the community, universities and the wider education sector as well as the business and creative sectors of the city.

35 Film Centre in Eastside

- This is a current proposition that has received much local support to date.
- The Film Centre would comprise three state of the art digital and conventional projection capabilities.
- A fourth screen would be dedicated to non-commercial, art house product.
- The Film Centre would also include digital art galleries and would showcase work by artists, filmmakers, photographers, entrepreneurs and digital artists.

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53 http://www.tic-online.com/mediavault/cn/newsletter/cn_news_april05.htm

- Programming would reflect and contribute to the cosmopolitan and international nature of the city's communities, screening product from, for example: Bollywood. Hollywood. Pinewood. Brummiewood.

36 Midlands Creative Arts and Digital Media Academy

- This is a proposal for a creative arts academy for 14 to 19 year olds, offering courses in digital media, visual arts and design, technical theatre, production, theatre, music, musical theatre and dance.
- The school would have a strong focus on creative media production and would develop links with local and national media providers.
- It aims to become the regional school of excellence for creative and media arts.
- Access to resources will be important- the school will become a 24/7 centre of learning, both in its physical space and in its outreach

37 Funding for Creative Projects

- There are a number of financing initiatives available for creative projects within Birmingham and the West Midlands.
- Sources of these range from private sector initiatives such as the venture capitalist fund Advantage Creative Fund to public sector sources under the Creative Cities banner (Creative Birmingham funds) to regional funds from the regional development agency Advantage West Midlands.

Appendix 4. Consultation List

Organisation	Name	Title
Arlington Securities	James Pitt	Head of Eastside Development
Arts Council	David Drake	Head of Visual Arts, West Midlands
AWM	Stuart Webb	ICT Cluster Manager
AWM	Roger Allonby	Former Head of Partnerships
AWM	Michael Ryan	Sector Co-ordinator, LSC
AWM	Michael Ryan	Sector Co-ordinator, LSC
AWM	Jon Bloomfield	European Unit
AWM	David Furmage	Screen Image & Sound Cluster Manager
AWM	David Furmage	Screen Image & Sound Cluster Manager
BCC	Val Birchall	Head of Arts
BCC	Dominic Moore	Senior Project Officer for Eastside
BCC - Eastside Team	Mark Reed	Project Manager
BCC - Eastside Team	Assad Hamed	Projects
BCC, East Birmingham Planning and Regeneration Team	Roger Hale	Programme Manager and Co-ordinator
BCC, Jewellery Quarter Regeneration Partnership	Andy Munro	Operations Director
BCC, Planning and Regeneration	Phillip Singleton	City Design Advisor
BCC, Planning and Regeneration - Investment, Enterprise, Employment	Jack Glonek	Assistant Director
BCC, Transforming Education	Nick Matthews	Project Co-ordinator

Organisation	Name	Title
Birmingham Alliance / Land Securities	Helen Rainsford	Development Manager
Birmingham Library	Brian Gambles	Head of Library and Archive Services
Birmingham Library	Brian Gambles	Head of Library and Archive Services
Birmingham Science City, AWM	Phil Extance	Project Director
Blitz Games	Mary Matthews	Strategy and Business Development Manager
Capsule Arts	Lisa Meyer	Founder
Centre for Urban and Regional Studies	Jane Lutz	Director of Graduate Studies
CFNX	Lucan Gray	Director
Channel 4	Stuart Cosgrove	Head – Nations and Regions
Character Shop	Paul Howell	Managing Director
Compass Land	Mark Thomas	Director
Concept Development Solutions	Tony Corbet	Development Director
Concept Development Solutions	Tony Corbet	Director
Creative & Cultural Skills	Alison Tickell	Consultant
Creative Partnerships	Anita Bhalla	Board Member
Culture West Midlands	Gavin Willetts	Strategic Development Manager
Custard Factory	Bennie Gray	Managing Director
Custard Factory	Bennie Gray	Owner, Designer, Developer
Development Securities	Roger Squire	Board Member, Projects

Organisation	Name	Title
Digital Central (Screen Media Lab UCE)	Dave Harte	Manager
Digital City Initiative	Sylvia Broadley	Digital Birmingham Innovation Manager
Eastside Partnership	Peter Stratton,	Director
End Board Productions	Sunandan Walia	Director
Film Birmingham	Suzie Norton	Director
First Light	Pip Eldridge	CEO
Glenn Howells Architects	Glenn Howells	Managing Director
HEFCE	Yvonne Perry	Acting Regional Consultant
HLF	Katie Foster	Chair, HLF West Midlands Committee
Hotbed Media	Jo Dyer	Chief Executive
ISIS Regeneration	Nick Bird	Development Manager
John Moores University, Liverpool	Michael Parkinson	European Institute Urban Affairs
Kinetic	Bob Gosh	Founder, Director
Locate Birmingham	Micheal Loftus	Professional and Financial Services Sector
MADE	Julia Ellis	Director
MADE	Jayne Bradley	Partnerships and Projects Manager
Major Key Studios	Phil Savage	Manager
Marketing Birmingham	Tim Manson	Marketing Manager
Maverick TV	Jonnie Turpie	Head of Digital Media

Organisation	**Name**	**Title**
MLA West Midlands	Jon Finch	Chief Executive
OOM Gallery	Pogus Ceasar	Photographer, film-maker; broadcaster
PACT	Sarah Jane Kerr	Director of Nations and Regions
Regen WM	Adrian Passmore	Chief Executive
Regen WM	Adrian Passmore	CEO
Seeing the Light	Rhonda Wilson	Director
Skillset	Amy Thomas	Midlands Regional Manager/Radio Sector Manager
Swish/ Eastside Dialogues	Roger Shannon	Director
SWM	Steve Chapman	Head of Regional Partnerships
UCE Birmingham	Steve Smith	Head of Screen, Sound & Interactive Media
UKFC	Tim Cagney	Head of Partnerships
Vivid	Yasmeen Baig-Clifford	Director
-	Neil Watson	Independent Consultant
-	Natasha Carlish	Independent Filmmaker, Producer and Director