

# **Creative South East Report**

**April 2008**

# Contents

	<b>Page</b>
<b><u>UK</u></b>	
<b>Creative Industries Overview</b>	<b>3</b>
<b><u>South East</u></b>	
<b>Creative Industries Overview</b>	<b>3</b>
• <b>The Games Industry</b>	<b>4</b>
• <b>Virtual Worlds</b>	<b>6</b>
• <b>Mobile Content and Services</b>	<b>6</b>
• <b>Advertising and Corporate Media</b>	<b>7</b>
• <b>Animation</b>	<b>8</b>
• <b>Film and TV</b>	<b>9</b>
• <b>Music</b>	<b>10</b>
• <b>Publishing</b>	<b>11</b>
<b>Universities and Centres of Excellence</b>	<b>12</b>
<b>Regional Clusters</b>	<b>13</b>
<b>Labour Force</b>	<b>14</b>
<b>Enterprise Hubs and Gateways</b>	<b>15</b>
<b>Business Networks</b>	<b>16</b>

## UK

The UK boasts a powerful Creative Industries sector, illustrated by the growth of the market in recent years. Between the 1997 and 2005 the creative industries grew by an average of 6% per annum, as compared to an average of 3% for the UK economy as a whole over this period.

*(Source: DCMS, Creative Industries Economic Estimates, 2007)*

The sector contributed 7.3% of the UK's GVA in 2005, and totalled exports of £14.6 billion, which equates to 4.5% of all goods and services exported in 2005.

*(Source: DCMS, Creative Industries Economic Estimates, 2007)*

There are almost 150,000 companies working within the industries many sub-sectors, employing approximately 900,000 people across the sector as a whole.

*(Source: SEEDA, derived from ONS data, 2007)*

Employment in the Creative Industries has steadily grown by 3.3% per annum from 1981 to 2006, as compared with 0.8% for the broader UK economy. The largest growth has been in the software, computer games and electronic publishing sector, which accounts for 31% of the creative workforce and has grown by an average of 6.5% a year since 1981.

*(Source: NESTA, 'Beyond the Creative Industries', 2008)*

The games industry is a significant creative force in the UK, with the highest number of games development companies and publishers in Europe. The UK computer games market is the fourth largest in the world after the US, Canada and Japan, with more games consoles sold in the UK than in both France and Germany combined. In 2006, the UK computer game industry recorded sales of £1.6 billion, a 1% increase on 2005.

*(Source: DCMS, 2008)*

In 2005, UK film exports amounted to £967 million, with a trade surplus of £163 million to the UK balance of payments. The UK post-production and visual effects industry is also performing strongly, one of the three largest in the world along with the USA and New Zealand; 76% of the production workforce in the UK film industry is based in London and the South East.

*(Source: UK Film Council, Statistical yearbook 2006/7)*

## The South East

The South East has a well developed Creative Industries sector both in terms of size and growth potential, with established business clusters in a number of sub sectors, including games development, film production and software design.

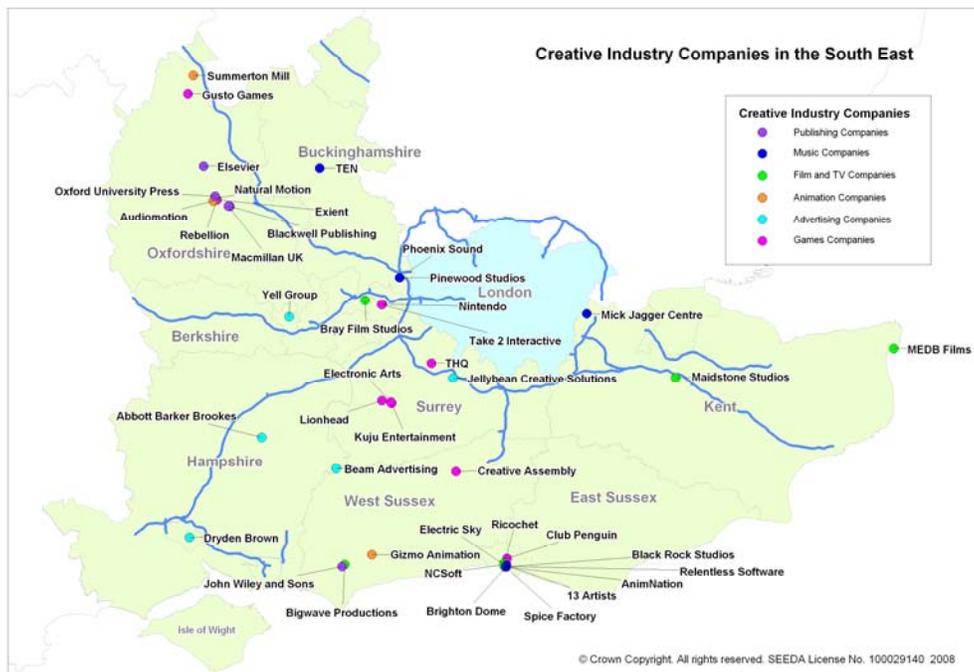
The sector is highly innovative, with growth often characterised by spin-offs, start-ups, new partnerships and diversification. Creative businesses in the region are dominated by self employment and small business. The

region is also home to a range of larger, more established organisations including Meridian television, BBC South and South East Studios, Electronic Arts and the Oxford University Press. The creative sector as a whole consists of approximately 30,000 companies, employing over 165,000 people.

*(Source: SEEDA, derived from ONS data, 2007)*

The region also has a number of Universities which maintain a strong presence in the sector. Companies establishing themselves in the South East benefit from a large pool of highly skilled employees and a steady supply of quality graduates. Over the period 2005/6 the region produced over 7,500 Creative Media graduates.

*(Source: HESA, 2007)*



## The Games Industry in the South East

The South East is home to many of the world's top gaming companies ranging from publishers and developers, to innovative design houses and specialised mobile content developers. Overall the South East is home to 21% of the UK's Computer games workforce.

*(Source: Skillset Employment Census, 2006)*

Game Companies in the region include:

- SEGA
- THQ
- Lionhead
- Ubisoft
- Creative Assembly
- Gusto Games
- NCSOFT
- Club Penguin
- Nintendo
- Take 2 Interactive
- Kuju Entertainment
- Exient
- Rebellion
- Climax
- Relentless Software
- Black Rock Studio

**Electronic Arts** is the world's leading independent developer and publisher of interactive entertainment software. The company employs approximately 700 people at its publishing house in Chertsey, Surrey where game development and distribution for the UK and the rest of Europe also takes place. The company's most popular titles of 2007 include *Battlefield*, *Army of Two*, *The Orange Box* and *Medal of Honour* | *Airbourne*, *FIFA 2008*.

[\(Source: EA Games, 2008\)](#)

**Ubisoft** is an international developer, publisher and distributor of interactive entertainment products. With a UK business office in Chertsey, Surrey the company has the second largest in-house development staff in the world. Following its release in 2007, the game *Assassin's Creed* became one of the three most popular games for Playstation 3 and Xbox 360 game systems, and in less than four weeks recorded more than 2.5 million units in sell-through sales worldwide.

[\(Source: Ubisoft, 2008\)](#)

**Lionhead Studios** was founded by the respected games developer Peter Molyneux in 2001. The Guildford, Surrey office is responsible for a number of games which have received worldwide critical acclaim. These include *Black and White*, Lionhead's first project, which achieved worldwide sales of over 2 million, and *Fable* which became the fastest selling Xbox game of 2004 with sales topping 1.5 million. The sequel to *Fable*, *Fable 2* is currently under development and due to be released later in 2008.

[\(Source: Lionhead, 2008\)](#)

**Kuju Entertainment** is one of Europe's leading independent games developers on console, PC and wireless platforms. The company has its company HQ in Godalming, Surrey as well as an office in Brighton, East Sussex and a specialist rail simulation studio in Guildford, Surrey. Kuju Simulation was set up in the summer of 2005 and the 'Railsimulator' project was developed in conjunction with Electronic Arts.

[\(Source: Kuju Entertainment, 2008\)](#)

| Based in Sheerwater, Surrey, **Creative Assembly** has grown to employ over 70 staff members. The company is best known for its strategic real time titles such as *Total War* and *Rome*. The most recent addition to the series, *Empire: Total War*, has been developed at the company's studio located in Horsham, West Sussex and is due for release in 2008.

[\(Source: The Creative Assembly, 2008\)](#)

**Black Rock Studio**, a part of Disney Interactive Studios, is one of the premier racing studios in the games industry. Black Rock Studio, formerly known as Climax Racing, was established in early 2000 in Brighton, East Sussex, with the goal of becoming the industry's foremost racing studio. The studio now employs more than 100. Using its proprietary render engine and PACE physics libraries, the studio has become experienced at producing triple-A, critically acclaimed racing titles in very competitive development times. Climax Racing was acquired by Disney Interactive Studios in October 2006 and re-named Black Rock Studio in July 2007.

[\(Source: Blackrock Studios, 2008\)](#)

Since releasing their first product, *DJ: Decks and FX* in 2004, **Relentless Software** has continued to grow. Winning a BAFTA for best social game in 2005, and more recently ranking 2<sup>nd</sup> highest in a poll of UK Independent Game Developers, the Brighton, East Sussex based company excels in the area of social gaming.

[\(Source: Relentless Software, 2008\)](#)

**NCSOFT**, based in Brighton, East Sussex is one of the world's leading developer and publisher of online games. Established in 2004, NCSOFT Europe serves as a central hub for all NCSOFT sales, marketing and distribution operations in Europe.

[\(Source: NCSOFT, 2008\)](#)

## Virtual Worlds

Virtual or Digital Worlds provide 3D interactive web platforms and simulated environments that can be accessed by multiple users. The market for massively multiplayer online games (MMOGs) in the West alone has been valued to be worth more than \$1 billion, with revenues from subscriptions expected to hit \$1.5 billion by 2011.

[\(Source: Screen Digest, 2007\)](#)

**Linden Labs**, the developer of *Second Life*, the largest user-generated 3D virtual world on the web, have recently set up a development office in Brighton; East Sussex. Established since 2003, *Second Life* has an international population and thriving economy, with many of the world's largest organisations having an in-world presence.

[\(Source: Linden Labs, 2008\)](#)

**Club Penguin**, owned by Disney was originally founded in 2005 to provide a safe virtual world in which children aged 6-14 could interact and play games. With currently over 700,000 paid subscribers and 12 million activated users worldwide, the company is expanding, and has recently opened a new office in Brighton, East Sussex.

[\(Source: Club Penguin, 2008\)](#)

## Mobile Content and Services

The strength of the telecommunications industry in the south east has helped to advance the development of content creation in the region. Vodafone, Nokia, Motorola and Samsung all have a significant presence in the region. There are a range of companies in the South East concentrating on the development of mobile technology, including:

**Affinity Studios**, based in Brighton, East Sussex has focused exclusively on the development of games for mobile devices since 2000. The company has over 15 years of games development experience, and currently offers games ranging from poker to touch down football to download from their website.

*(Source: Affinity Studios, 2008)*

**Future Platforms** in Brighton, East Sussex was founded in 2000, with the ambition to take digital media beyond the PC. Since then they have built a strong reputation in the mobile industry for interface design and technical innovation, developing complex mobile services and advertising campaigns.

*(Source: Future Platforms, 2008)*

**Yamgo**, a mobile TV company created in 2001, was one of the first companies to publish extreme sports videos on mobile phones. Based in Oxford, the company provides a global web and mobile TV platform for live and pre-recorded content distribution and a social networking service that enables consumers to watch, share and broadcast videos over any WAP enabled phone with video support.

*(Source: Yamgo, 2008)*

## **Mobile Services**

A number of companies have also grown up in order to provide services to the mobile content sector. Examples of key players providing mobile services in the region include:

**Mobiya**, in Thame, Oxfordshire is a mobile classified advertising company providing an entirely automated classified platform, from self-service to cross-media publication. The service supports both text-based and video advertisements, and is targeted at newspaper publishers, media giants and classified portals.

*(Source: Mobiya, 2008)*

**iCrossing** in Brighton, East Sussex is a digital marketing agency, using digital media in innovative ways to help clients achieve measurable marketing success. They offer mobile marketing, including mobile advertising, mobile search optimisation and mobile site development.

*(Source: iCrossing, 2008)*

## Advertising and Corporate Media

The South East region also has a successful advertising and corporate media sector. The advertising sector employs over 13,000 people in over 2,100 companies.

*(Source: ONS, 2008)*

17% of the UK's corporate production employees are also based in the region, which benefits from its close proximity to London.

*(Source: Skillset Employment Census, 2006)*

Based in Liphook, Hampshire, **Beam Advertising and Marketing Associates** are a marketing and communications agency providing a full range of services including advertising, graphic design, multimedia and copywriting. Clients include blue chip organisations from a variety of sectors including IBM and Hitachi.

*(Source: Beam, 2008)*

**Dryden Brown**, located in Southampton provides advertising and B2B marketing to a range of UK and International clients. The organisation offers solutions which incorporate web and media into campaigns and are quick to download.

*(Source: Dryden Brown, 2008)*

**Jellybean Creative Solutions** has over 18 years experience providing B2B communications and devising B2C campaigns for clients in the food industry. From their Leatherhead office in Surrey, the company has worked on campaigns for companies including Jordans, Twinings and Ovaltine.

*(Source: Jellybean Creative Solutions, 2008)*

The **Yell Group** is a leading international directories business operating in the classified advertising market through printed, online and phone-based media. With their UK HQ located in Reading, Berkshire the company reported profits for the first half of 2007 of £114.7 million.

*(Source: Yell Group, 2008)*

**Abbott Barker Brookes**, is a business to business creative consultancy based in Alresford, Hampshire. Established in 1991, the company has over 17 years experience of working with a diverse portfolio of clients, producing logos, literature and point of sale material as well as adverts and product catalogues.

*(Source: adoubleb, 2008)*

## Animation

In addition to a thriving computer games industry, the South East boasts a talented animation sector. This is characterised by high levels of technical and creative skills with many animators also involved in cross-platform working with the region's computer games industry.

Based in Oxford, **NaturalMotion** is the creator of a ground breaking 3D character animation technology - Dynamic Motion Synthesis, which creates high-quality 3D character animation in real time by combining artificial intelligence, biomechanics, and dynamics simulation. The company's first product 'endorphin' uses this approach to dramatically accelerate 3D animation production, and most recently, it has been used in Playstation 3 and Xbox 360 to create unique game movements.

[\(Source: Natural Motion, 2008\)](#)

Based in Brighton, East Sussex, **AnimNation** undertakes high quality 2D and 3D Animation and 3D Visualisation in a variety of styles. The company also provides post production services including video compositing and editing. Animation has produced work for clients including Nickelodeon, CBBC and Robinsons.

[\(Source: Animnation, 2008\)](#)

Located in Banbury, Oxfordshire, **Summerton Mill** was formed after a meeting at a networking event. The company has produced a 13-part children's animation series for the BBC, using stop frame animation, from its base in the Colin Sanders Innovation Centre.

[\(Source: summertonmill, 2008\)](#)

**Audiomotion** in Oxford is a multi-award winning motion capture studio, specialising in providing motion capture services to the game development and film and television industries. Their 6,000 sq ft facility equipped with a Vicon MX40 system gives Audiomotion the largest in-house capture area in the country. Past projects include the 'Alive with Technology' advertisements for Citroen and work on the film *The Poseidon Adventure*.

[\(Source: Audiomotion, 2008\)](#)

**Gizmo Animation** is a graphics, animation and design company based in Arundel, West Sussex. The company works in a wide variety of formats, from standard and high definition to NTSC, and provides graphics and animation to both the broadcast and corporate side of the industry.

[\(Source: Gizmo Animation, 2008\)](#)

## Film and TV

The South East was the birthplace of commercial film-making in the UK and has a history which dates back to the 1930's, the pioneering age of filmmaking. The region holds a highly significant position in the international film industry, overall, about two thirds of the UK film industry is based in the South East and London

[\(Source: Screen South Annual Review 06/07\)](#).

Recent film productions shot and supported in the South East include the new Bond film, *The Quantum of Solace* and *Sweeney Todd*, which were both filmed at Pinewood Studios.

### **Pinewood/Shepperton Studios**

Pinewood film and television studios are based in Buckinghamshire, with Teddington and Shepperton studios also included within the Pinewood Studios Group. Pinewood's current facilities include the large 007 silent stage and the largest external water tank in Europe, and are set to undergo significant extension. 'Project Pinewood' will see the creation of the world's first purpose-built 'live-work' community, greatly extending the studio's film sets and residential areas. This will include vocational training for the national and international film and television industry within a sustainable community.

[\(Source: Pinewood/Shepperton, 2008\)](#)

The South East accounts for over 10% of the UK's production companies, with over 1,500 based in the region. This figure includes companies making feature films, corporate audio visual material, programmes for broadcast television, commercials and consumer products.

[\(Source: SkillsSet, 2006\)](#)

**Bray Film Studios** are based in Windsor and were once the home of the Hammer horror films during the late 1950's and early 1960's. Today the studio is a thriving advertisement and music video production facility.

Based in Kent, **Maidstone studios** have 20 years of television production experience. There are 5 studios at the site which are suitable for a range of programming uses. The studios are currently home to the talk show *Trisha* and the children's programme *Art Attack*. Studio 5 is one of the largest in the UK with a 12,000 sq foot studio floor.

[\(Source: Maidstone Studios, 2008\)](#)

### **Film and television producers in the region:**

Based in Brighton, East Sussex, the film company **Spice factory** has co-produced or financed over 45 feature films, with a combined spend of over \$600 million (£305 million) worth of production. Spice factory leads the world in industry co-productions and has worked with many industry leaders and world class talent. Films the company have either produced or financed include, *Beowulf and Grendel* and *The Merchant of Venice* – with Al Pacino.

[\(Source: Spice Factory, 2008\)](#)

**Bigwave** productions are based in Chichester, West Sussex and produces high end science and wildlife documentaries for worldwide broadcasters. Titles currently in production include *Saved by Dolphins* for the BBC and *Death the Inside Story* for Channel 4 and the Discovery Channel. Previous productions have included the popular *Revenge of the Crocodiles* for the BBC.

[\(Source: Bigwave, 2008\)](#)

**MEDB Films**, based in Ramsgate, Kent is a one-stop-shop for independent filmmakers in the UK. The company offers a significant pool of creative partnerships including links to financiers and other companies.

Facilities at the post-production centre in Ramsgate include a new twelve seat HD screening room.

[\(Source: Medb Films, 2008\)](#)

With an office in Brighton, East Sussex **Ricochet** is one of Britain's leading independent television companies, producing factual and entertainment programmes for networks in the UK and US. Recent successes include *Supernanny*, which is now airing in 47 countries, *No Going Back* and *Its Me or the Dog*. The company employs over 150 people across its Brighton, London and Los Angeles offices.

[\(Source: Ricochet, 2008\)](#)

**Electric Sky**, based in Brighton, East Sussex is an innovative distribution and rights-management company. Specialising in quality factual programme distribution, the company has a diverse catalogue featuring over 1000 hours of programming and a vast network of contacts in the international marketplace. The company has continued to grow since it was established in 1998.

[\(Source: Electric Sky, 2008\)](#)

## Music

The South East region is well represented in all areas of the music industry from composers to producers, distributors, publishers, artists, concert promoters, venues, festivals, record companies and online music entrepreneurs. The region is also home to a range of summer festivals and a number of high quality recording studios.

With its new recording facility located at Pinewood studios, **Phoenix Sound** is able to record and mix music for a variety of media. The studios are fully equipped with 5.1 surround monitoring and a complete range of multitrack resources. Clients include both film and television companies as well as games companies such as Sony recording scores for upcoming PlayStation games.

[\(Source: Phoenix Sound, 2008\)](#)

**TEN**, the entertainment distribution company, covers over 14 acres and employ 400 people in Aylesbury, Buckinghamshire. The company is owned by Cinram International and distributes on behalf of Sony Music UK and Warner Music UK among others.

[\(Source: Cinram, 2008\)](#)

**13 Artists**, the independent booking agency based in Brighton, East Sussex has grown to include a number of prestigious acts since being founded in 1999. Artists include the Arctic Monkeys, The Kooks and Radiohead.

[\(Source: 13 Artists, 2008\)](#)

Some of the numerous music venues across the region include the **Brighton Dome**, which has recently undergone a multi-million pound rebuilding and refurbishment to become a world-class flagship facility for all kinds of music presentation. The **Mick Jagger Centre** in Dartford,

Kent, a purpose built music and arts venue that has two fully equipped flexible performance areas, a Music Technology suite and a visual arts suite. **Concorde 2** and **Barfly** are both venues in Brighton, East Sussex which promote up and coming live bands and hold regular club nights.

Music festivals in the region include **The Great Escape**, a 3 day festival run annually by Barfly, featuring over 200 acts in 25 venues across Brighton. The **Brighton Festival**, now in its forty second year is a 3-week mixed arts festival held in venues across the city, with music ranging from Classical to Afro-funk and Gypsy.

## **Publishing**

The South East has a thriving publishing sector, which covers a wide range of areas including the publication of print, magazines and scientific and academic journals.

**Oxford University Press** is one of the largest publishers in the UK and the largest university press in the world. The organisation publishes more than 4,500 new books a year. It also has a presence in over fifty countries, and employs over 3,700 people worldwide.

*(Source: OUP 2008)*

Also based in Oxford, **Blackwell Publishing** is part of the John Wiley & Sons group. Blackwell publishes books and journals for the higher education, research and professional markets. Most journals are published on behalf of scholarly societies ensuring that the content is of the highest quality and relevance. The company is eager to take advantage of new technologies which could make production processes more efficient and deliver content directly to readers.

*(Source: Blackwell Publishing, 2008)*

Based in Chichester, West Sussex, **John Wiley & Sons** specialises in scientific technical and medical books and journals. The company publishes in a variety of formats

*(Source: Wiley, 2008)*

With its UK corporate office located in Oxford, **Elsevier** is the world's leading publisher of science and health information, serving more than 30 million scientists, students and health professionals worldwide.

*(Source: Elsevier, 2008)*

**Macmillan UK** has offices in Basingstoke, Hampshire and Oxford representing two of the publishing house's major divisions. Palgrave Macmillan in Basingstoke specialises in academic scholarly and reference publishing in the humanities and social sciences, while Macmillan Education in Oxford publishes educational and ELT material for a worldwide market.

*(Source: Macmillan UK, 2008)*

## **Universities and Centres of Excellence**

The regions 24 Universities and Higher Education Institutes offer undergraduate, postgraduate and further education courses in a wide range of creative subjects. Approximately 7,500 creative media graduates are added to the labour force annually. Many of the universities offer consultancy services and work with successful businesses in the region.

**The University College for the Creative Arts** is one of the UK's leading providers of specialist art and design education and has five locations across the region including Canterbury, Epsom, Farnham, Maidstone and Rochester. Areas of focus include sustainable design, where research is conducted into sustainable construction. This includes research into use of recycled plastics and fewer components.

*(Source: [University College of the Creative Arts](#))*

**University of Portsmouth, Creative Technologies Department** has expertise in a wide range of areas. These include digital media and computer animation, computer graphics and virtual reality, computer games development and digital content production, music, sound and television production and artificial intelligence networks. The department offers thirteen undergraduate and post graduate courses and focuses on ensuring their graduates also leave with the relevant business skills, required to succeed in establishing a business.

**Oxford Brookes University** has the longest history of publishing education and training in the UK. The university's International Centre for Publishing Studies is one of the leading international organisations in its sector. The centre provides postgraduate and undergraduate programmes as well as a range of other training opportunities and research programmes. It is advised on curriculum content by a board consisting of senior industry representatives.

*(Source: [The Oxford International Centre for Publishing Studies](#))*

**Oxford Publishing and Digital Media** specialises in book, magazine, journal and electronic publishing, broadcasting and digital media. Aiming to meet the needs of the traditional publishing and media business the centre also provides support and expertise to those within these industries that find themselves increasingly incorporating 'digital' into their way of thinking.

*(Source: [Oxford Publishing and Digital Media, 2008](#))*

**Southampton Solent University, School of Media** has close links with the creative industries particularly in the areas of television, popular music, radio and film production. In partnership with Meridian Television, the University has established the UK's first ITV Centre of Excellence which provides students with access to a high tech training and research facility.

*(Source: [Solent University, 2008](#))*

**Kent University, School of Drama, Film and Visual Arts** has been at the forefront of developing film studies as an academic subject. Kent are

one of the three major universities in the UK for film studies, and one of the most well-regarded departments in Europe.

*(Source: Kent University, 2008)*

## **Regional Clusters**

There are more media companies in Brighton and Hove than in any other town in the South East, employing around 5,000 people. A large proportion of these are web design companies, although other media sectors are represented. These include animation, e-learning, and games developers.

*(Source: Wired Sussex, 2008)*

The Oxfordshire publishing sector is estimated to be worth £1.27bn. Oxford is a leading location for academic and STM publishing, home to two leading educational publishers and two major ELT publishers, and, arguably the birthplace of children's publishing. A total of 5,100 employees work with more than 285 publishing companies in Oxfordshire.

*(Source: Oxfordshire Publishing Cluster: Initial Scoping Study, Oxford Innovation, 2006)*

The film/TV studios in the region provide a base for a cluster of supply companies. There are over 250 independent companies based at Pinewood, Shepperton and Teddington Studios providing expertise, services and resources to film, television and commercial productions.

*(Source: Pinewood Studios, 2008)*

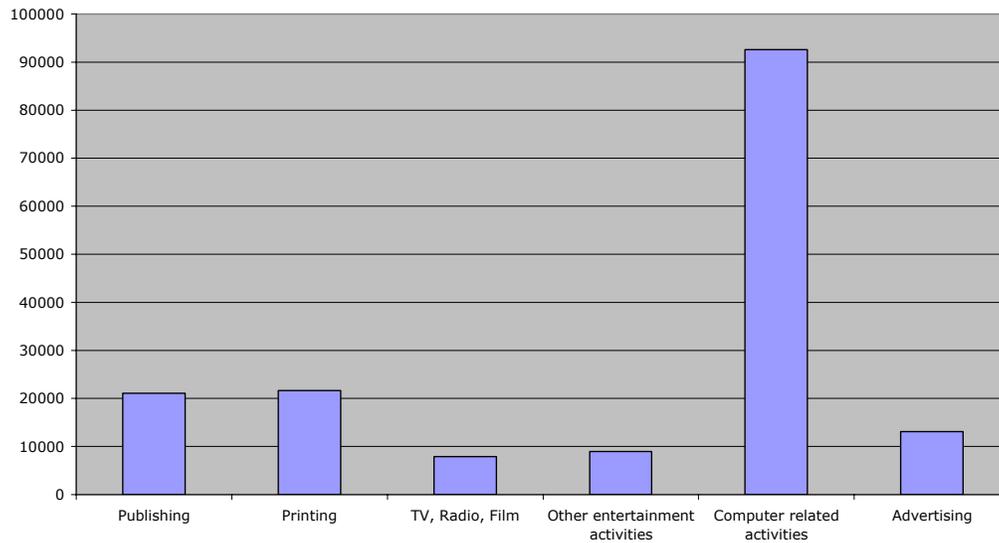
There is also significant cluster of TV production and corporate media companies centred around Maidstone studios in Kent and a further cluster centred around the Southampton area with the presence of ITV Meridians HQ

*(Source: South East Media Network, 2008).*

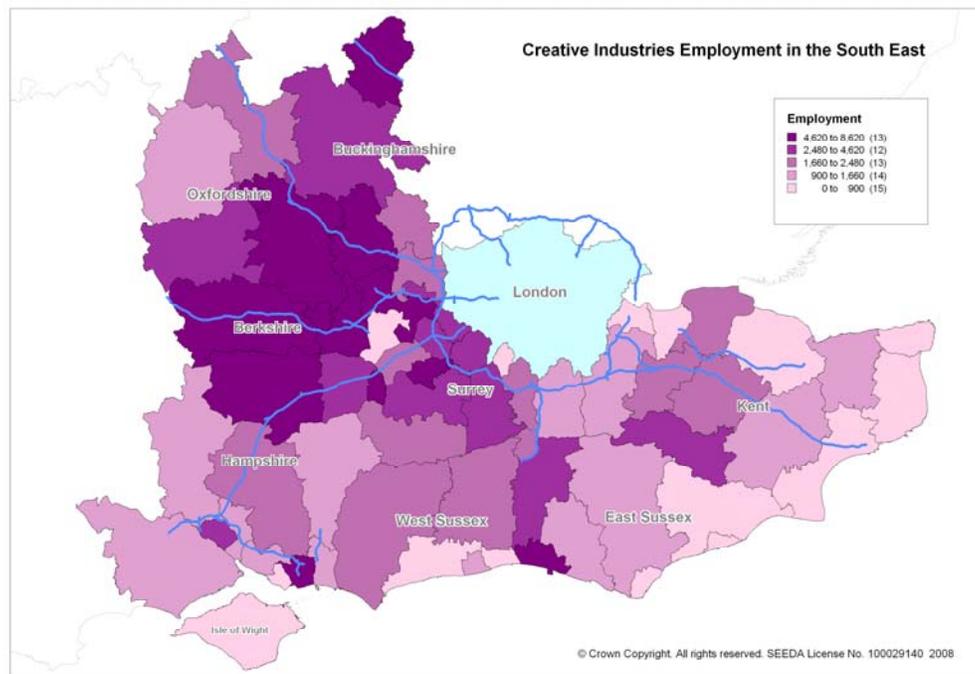
## **Labour Force**

There are over 165,000 employees working in the Creative Industries sector in the South East, 18% of the UK total.

### Creative Industries Employment Breakdown



*(Source: SEEDA, derived from ONS data, 2008)*



### Enterprise Hubs and Innovation Centres

The Enterprise Hub Network focuses on entrepreneurial individuals and companies, helping them to bring ideas to market quickly and profitably. The Network is built around a team of commercial experts, based in Hubs across the South East. They draw on a wide range of specialists to help

support entrepreneurs and businesses realise their potential and typically help businesses at early or developing stages of growth, helping member companies to go further, faster.

The region has twenty three Enterprise Hubs, the High Wycombe and Slough Hubs focus especially on the creative industries sector and offer flexible work space.

**High Wycombe Enterprise Hub** is a centre for design excellence, focusing on the needs of design and design related companies. The hub encourages collaboration in a range of ways from nurturing design talent to sharing best practices and methods for running a growing business successfully. The hub has close links with the Design Council, the British Design Initiative, Southern Arts and the Design Promotion Department at the British Council. It also has links variety of trade organisations including the Chartered Society of Designers.

*(Source: [enterprise hub network, 2008](#))*

**Thames Valley Enterprise Hub** focuses on the creative media, information and communication industries. The hub is ideally located with a number of key players nearby including IBM, Oracle, ICL and Microsoft. Pinewood and Elstree studios and the Ealing Media Village are also located in close proximity.

*(Source: [enterprise hub network, 2008](#))*

**Surrey Enterprise Hub** works intensively with 12 portfolio companies and 15 network companies that comprise a cluster of creative industries companies in the region. The Hub has broad strengths in the digital media and media technology sectors.

*(Source: [enterprise hub network, 2008](#))*

Other Enterprise Hubs in the South East working with clients in the creative industries sector include, **East Sussex, Gatwick Diamond and West Sussex, Sittingbourne, Solent, and Southampton.**

There are also several innovation centres in the South East that encourage the development of creative companies by offering flexible work space. **The Brighton Media Centre** offers serviced space in central Brighton with additional services including IT support and photo studios.

*(Source: [www.mediacentre.org](http://www.mediacentre.org), 2008)*

## **Business Networks**

**South East Media Network (SEMN)** is a business led consortium providing strategic focus for the region's digital content sector, it exists to enable the South East of England's digital content businesses increase their share of the global market. SEMN provides two way communications between businesses, policy makers and support organisations. It informs local, regional and national strategies and drives improvement in business performance. SEMN is made up of a number of member networks and

clusters across the South East regions, all of which offer networking events, tailored business services and skills and training development.

*(Source: [www.southeastmedianetwork.co.uk](http://www.southeastmedianetwork.co.uk), 2008)*

**Screen South** offers a number of services to business including funding information and working with industry to encourage standards of excellence. Screen South also holds networking events. The organisation acts as an advocate for the regions film and video industry both nationally and internationally.

*(Source: [Screensouth](http://Screensouth.com), 2008)*

**Arts Council England - South East** focuses on sustaining and promoting art in the region. During the year 2006 – 2007, the council awarded £626,709 to individuals and arts organisations in the South East, through grants for the arts open access schemes.

*(Source: [Arts Council](http://Arts Council), 2008)*

**Lighthouse in Brighton, East Sussex** provides creative and professional development opportunities for film makers, screen writers, digital artists and animators. The organisation provides access to training and mentoring programmes for artists and filmmakers, bursaries, and a commissioning programme which is designed to provide opportunities for artists and artist groups to develop new work in a supportive environment.

*(Source: [www.Lighthouse.org.Uk](http://www.Lighthouse.org.Uk), 2008)*

**Wired Sussex** are an independent non-for-profit organisation based in Brighton, East Sussex. They work with digital media companies of all shapes and sizes, helping them to develop and grow. Services include regular events and conferences for companies and individuals working in digital media, as well as assistance for job seekers and recruiters.

*(Source: [www.wiredsussex.com](http://www.wiredsussex.com), 2008)*

*With thanks to: SEMN, Wired Sussex, UKTI, Screen South, Oxford Innovation Network, Oxford Economic Partnership, Surrey Economic Partnership, PACT, IASSE, Thames Valley Enterprise Hub, Enterprise Hub Network and The Production Guild*

<b>Disclaimer</b>
-------------------

The overview includes information compiled from various reputable sources and other methods like structured interviews & surveys, conference material and information available in the public domain. As data and information sources are outside our control, SEEDA makes no representation as to its accuracy or completeness. All responsibility for any interpretation or actions based on this overview lies solely with the reader.
---