

Summary Report

Artists' Studio Provision in the Host Boroughs: a review of the potential impacts of London's Olympic Project

Commissioned by

National Federation of Artists' Studio Providers

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The National Federation of Artists' Studio Providers

Unit 5
Toynbee Studios
28 Commercial Street
London E1 6AB

www.nfasp.org.uk
ask@nfasp.org.uk
020 7426 0067

David Powell Associates Ltd

4 Albion Buildings
1 Back Hill
London EC1R 5EN

www.dpa-ltd.co.uk
info@dpa-ltd.co.uk
020 7713 8100

Summary

Over the last 40 years, one of the world's largest and most sustained communities of visual artists has grown up in East and South East London. In the boroughs now hosting London's Olympic project, the studios and workspaces for many thousands of artists have, in very large part, been set up and run by artists themselves. The oldest and most established studio providers originated like this and have matured into development organisations providing secure and affordable space for a wide diversity of art practices to flourish, for educational and creative opportunities for the wider public, and for a range of regeneration benefits to their communities.

More than a quarter of the UK's studio buildings are located in the five host boroughs (Greenwich, Hackney, Newham, Tower Hamlets, and Waltham Forest). Some three dozen studio providers offer 940 affordable studio spaces for visual artists, with another 2,900 artists on their waiting lists. Many more artists are working in a variety of informal situations, which can be short term, expensive or unfit for purpose.

Regeneration pressures have always made achieving security and affordability difficult. Developments related to London's Olympic project exacerbate this and are now compounded by the uncertainties in the financial and property markets. Studio providers work effectively with local regeneration and development partners, their best practice securing affordable, long-term workspace for this world famous artists' community.

To secure and extend these opportunities requires stronger and more consistent support within planning frameworks, regeneration policies and local and sub-regional priorities. Local authorities, statutory regeneration agencies, the Mayor of London and Arts Council England each have an essential role to play in the development of sustainability of creative communities in East and South East London.

The National Federation of Artists' Studio Providers will work with the local authorities, the agencies involved in the delivery of the Olympics and with social and commercial developers to try to ensure that existing artists' studios do not become a casualty of the development pressures associated with 2012 or the longer term. This research, and the studio providers' substantial evidence of effective and sustainable development practice in providing affordable creative workspace, set out how artists' studios can contribute to Olympic legacy and to the long-term regeneration of local communities.



Executive Summary

1. Introduction

Since the 1960s, artists have been occupying former industrial and other buildings across East and South East London to use as studio spaces. The host boroughs (Greenwich, Hackney, Newham, Tower Hamlets, and Waltham Forest – the host boroughs in East and South East London which are closest to the Olympic park) are now home to several thousand artists and the galleries and professional services and businesses which support and supply them.

Driven by the need for affordable space for an increasingly wide variety of visual arts practice, over the years hundreds of buildings have been brought into temporary use as productive working spaces. Far fewer have been converted into long-term affordable premises, and waiting list and occupancy levels are always high.

This studio ecology has always faced pressure from local and national regeneration programmes – the Thames Gateway remains the Government's national regeneration priority – as well as from the piecemeal redevelopment of older industrial buildings into apartments, offices and other commercial space. The development of the Olympic facilities adds another layer of development pressure and organisational complexity.

This research and the actions that will follow from it are driven by the need to foster a better understanding of the contribution of artists' studios to local communities and to the host boroughs

as a whole, and to identify planning and regeneration mechanisms which might support more affordable and sustainable workspace for artists.

This report was commissioned by the National Federation of Artists' Studio Providers (NFASP) and funded by Arts Council England London and the London Borough of Newham. It sets out to review the impact of London's Olympic project on artists' studios in the host boroughs. It focuses on the needs of visual artists for long-term, affordable, sustainable workspace.

The research maps existing studio providers in the host boroughs and reviews where and why their properties are at risk. It identifies a range of planning, regeneration and development agencies whose role is influential on the survival and sustainability of the workspaces offered by studio providers. It is concerned with the particular needs of the specialised, relatively low-income cluster of visual arts activity, which is important to the host boroughs and to London as a whole.

The report proposes a number of actions which NFASP should undertake to promote the importance of artists' studios in providing long-term affordable workspace for working communities which make a unique and highly valued contribution to the quality of life and reputation of the boroughs in which they are based.

2. Studio groups and buildings in the host boroughs

The London-wide context

There are at least 135 studio organisations and 252 studio buildings in England alone, providing affordable studios for around 5,000 artists¹. London has more artists' studio buildings than the rest of England combined, with more than two thirds of this space located in the east and south east of the capital. Research² in 2005 reported:

- Studios in London provide space for around 2,000 artists, with more than 3,500 artists on waiting lists in the capital.
- The majority of studios have been started by artists themselves: this is a movement generating substantial social capital.
- A significant number of buildings are 'at risk'. Very few studio buildings are owned by artists or studio providers – nearly 80% of the total space is rented. Nearly three quarters of the buildings are more than 50 years old; 11% were considered, in 2006, to be in poor condition.

¹ NFASP website June 2008 <http://www.nfasp.org.uk>

² *A survey of artists' studio groups and organisations in England* (2005) and *London Digest: a survey of Artists' Studio Groups in London* (2006), Acme Studios, London. See main report section 1.3 for full research references.

- Rents in London are the most expensive nationally, averaging £7.54 psf per year. This inclusive figure was considered a benchmark of an 'affordable' rate in 2006 and was updated to £8.50 psf in 2007.
- 24% of the studio units in London were located in Hackney: 30% of studios by floor space were in Tower Hamlets.

Artists' studios in the host boroughs

This 2008 research identifies 28 studio providers operating in the host boroughs (24 actually located there) and 58 buildings where more than 50% of the occupants are visual artists. Hackney has the highest concentration of the host boroughs' studio groups and studio buildings, with 52% of buildings, 36% of units. Tower Hamlets has 34% of studios, but 58% of studio units. Newham, Waltham Forest and Greenwich have between them the remaining 14% of the host borough studios.

Most studio providers are formally incorporated and have studio provision as their priority. Other providers include three commercial landlords and the London Borough of Waltham Forest. Many studio groups are less formal, often occupying buildings as subtenants or in other quasi-commercial arrangements. There are even less formalised groups which are emerging the whole time: the vast majority of these will not have been mapped in this brief survey or in other earlier research.

3. Security of studio tenure

Only three of the 58 buildings identified in the host boroughs are owned by a studio provider. There have been no changes to the list since 2004, indicating that this is not a continuous process. Buildings are rented from private landlords (70% in 2008 - less than in 2004), local authorities (22% - up on 2004) and from the Crown Commission, Registered Social Landlords and others.

Sixteen studio buildings have leases expiring by 2012, five by 2008. Seven of these are expected to renew on affordable terms, five to vacate and the status of four of these is not known. Closures continue to occur. SPACE, for example, reports 10,000 sq ft of studios lost in the last four years.

A number of recent and new studio developments are under contract or in advanced planning. SPACE has 15 units at the Triangle in Hackney, and has taken on management of the Barking Malthouse from London Thames Gateway Development Corporation. New projects include Acme Studios' 21 studios at Leven Road in Tower Hamlets (the first UK model of affordable studios in a social housing project) and ACAVA will have 12 new studios within a large supported housing project in Canning Town.

Informal arrangements

Many artists, whether they are already on studio providers' waiting lists or not, create informal working arrangements for themselves, in a wide variety of more or less regular arrangements with owners, landlords and occupiers. Whilst this

may suit some artists, others, by inexperience or through lack of choice, find themselves in expensive, insecure or inappropriate workspace to the detriment of their practice.

Affordability of rents

A range of rents are offered by studios in the host boroughs. An affordable rent is now (2008) considered to be between £9 and £9.20 inclusive psf per year for visual artists' studios in London. Affordability for young and established visual artists diminishes above this and it is considered that anything over £12 psf becomes increasingly difficult for visual artists to afford unless they share or take much smaller spaces.

The great diversity, the different scale and the technical demands of thousands of individual artists' practices require a wide variety of types of studio. For many artists, smaller spaces are not appropriate.

4. Demand for studio spaces

The host borough studio providers have c2,900 artists on their waiting lists. This level of demand has stayed this strong over the last five years or more. Many artists state that a studio base in one of the host boroughs is a priority. There is clear evidence of demand from European and other international artists. There is no evidence that the market is oversupplied. Occupancy levels in well managed studios remain very high and turnover very low.

5. The impact of the Olympic project

Artists' and providers' perceptions

Artists and providers feel that London's Olympic project is already having a detrimental effect. This is experienced in a number of ways such as increasing land and property prices, heightened interest leading to a greater demand for space and the host boroughs attracting new (more commercially profitable) creative and other small businesses. Other regeneration dynamics, such as the new transport links like the Underground in places like Dalston, will be equally if not more influential on the sustainability of studio provision. Different parts in each of the host boroughs are more or less affected by commercial or Olympic driven regeneration.

The process of clearing the Olympic park of light industrial occupiers has significantly reduced the number of potential studio spaces within and around the Lower Lea Valley. It also appears to have dispersed some of the specialist trades and services that support visual arts practice.

Olympic impacts on host borough studios

Regeneration and development activity related to the Olympic project has already increased the commercial pressures on building stock appropriate for artists' studios and is putting existing leased property under increased threat. New affordable, long-term studio developments are offering smaller numbers of studios per development, which, in some cases, increase development and management costs for studio

providers, almost all of whom are social rather than commercial enterprises.

The informal studio sector and artists operating outside provided studios appear to be falling into more opportunistic, less affordable and less sustainable studio arrangements, as more short-term properties or less appropriate commercial studios are available. Continued unfulfilled demand and lengthy waiting lists often push artists into less formal, sometimes less favourable arrangements.

Planning, regeneration and cultural policy, strategy and funding are affected by London's change of political leadership, the agency and policy implications of which are not yet fully known. Local planning reviews, Local Development Frameworks, the London Plan and the Olympic Legacy Masterplanning Framework have not yet specifically identified how they might best retain existing or support the development of new long-term, affordable workspace.

The report in its final section identifies the range of local, sub-regional and London-wide agencies, both those specifically tasked with Olympic development responsibilities and those whose work is related to Olympic and other major regeneration programmes in the host boroughs.

6. Opportunities for affordable studio developments in cultural, planning and development strategies

Local authorities, statutory regeneration agencies (such as the London Thames Gateway Development Corporation, the Olympic Delivery Authority and the London Development Agency), the Mayor of London and Arts Council England each have an essential role to play in the development of sustainability of creative communities in East and South East London. The National Federation of Artists' Studio Providers will work with the local authorities, the agencies involved in the delivery of the Olympics and with social and commercial developers to identify opportunities in regeneration and planning frameworks, and in master planning and Olympic legacy discussions for securing existing and new affordable workspace. It will work with agencies and developers to ensure that existing artists' studios do not become a casualty of the development pressures associated with 2012 or the longer term.

Host boroughs

The host boroughs work closely together on a range of Olympic related opportunities, and are led by Hackney in cultural matters through the Cultural Partnership Board. Opportunities have already been explored for involving artists' studios in future host borough festivals.

Individual boroughs are reviewing their Local Development Frameworks. There are currently a number of opportunities to

advocate a clearer priority for and better understanding of the role of artists' studios in development and regeneration. Key arguments include the delivery of affordable workspace for local skilled employment, and contributions to local distinctiveness and prosperity.

Sub-regional and London-wide partnerships

Thames Gateway London Partnership (TGLP) offers a sub-regional platform for inclusion in Gateway-wide consultation on planning, economic and related matters. London Councils provides another level of coordination and leadership related to culture, legacy and the Olympics.

Lower Lea Valley, Olympic Park and the Olympic Fringe

There is a complex web of agencies involved in development and preparation for the cultural and economic legacy of the 2012 Games. NFASP should work closely with the London Development Agency (LDA), Arts Council England (ACE) and others to ensure that the right level of intervention is made in legacy preparations, as part of the Legacy Masterplanning Framework. Other influential bodies are the London Thames Gateway Development Corporation (LTGDC), which already supports studio related initiatives in Barking, and the Lea Valley Regional Park Authority (LVRPA).

The Mayor, GLA and London Development Agency

The Mayor's new directions for culture are beginning to emerge with the publication of *Cultural Metropolis*, and should form an important context for the expected review of aspects of the

London Plan. The LDA will remain an important funder, landowner and regeneration agency and has yet fully to take advantage of the expertise which lies with studio providers in delivering and managing affordable workspace for a high-profile, highly skilled creative community.

Cultural Agencies

ACE, one of the funders of this research, plays a leading role in its support for the artists' studio sector, and also as an advocate for the particular contributions from and requirements of studio providers. It plays a leading role in the London Living Places Partnership which brings together London's funding and policy agencies, the LDA and Government.

Registered Social Landlords

RSLs already benefit from the expertise of studio providers in jointly delivering new studios in the host boroughs. There are significant opportunities to extend this, and to involve the new Housing and Communities Agency.

Higher Education Institutions

HEIs remain a relatively under-exploited area for shared development activity with studio providers within the host boroughs.

Commercial Developers

Opportunities for identifying new development opportunities, building on studio providers existing contacts, will be identified through a closer engagement with planners and regeneration

officers in the host boroughs, and by developing relationships with developers and regeneration agencies, networks and partnerships in East and South East London and nationally, supported by better appreciation of the contribution of studios to local regeneration, and the available expertise and mechanisms.

7. Summary of Actions

Recommendations for action are set out in Section 7 of the report. They are allocated in the first instance to the National Federation of Artists' Studios Providers or to Arts Council England (as the national policy and development agency most engaged with Olympic related planning). The recommendations respond to the following types of challenge and opportunity.

Local Planning and Strategic Priorities

NFASP proposes to engage more closely with the host boroughs Cultural Partnership Board, the five individual boroughs, Thames Gateway London Partnership, London Thames Gateway Development Corporation, and others:

- to encourage them to specify policy and practical support for sustainable, affordable visual artists' workspace
- to promote best practice in achieving affordable new developments in partnership with RSLs, commercial developers and others.

NFASP proposes to engage more closely with the five individual boroughs who are currently reviewing the Local Development

Frameworks to encourage them to specify practical policies for sustainable, affordable visual artists' workspace

Olympic Legacy

NFASP proposes that the Mayor of London, ODA, and LDA should place specific policies to retain and encourage new affordable workspace development for visual artists within the Olympic Strategic Regeneration Framework and the Legacy Masterplan Framework.

Arts Council England London and other agencies with a cultural remit in London Thames Gateway should press the case for artists' studios, as a specific category of activity and distinct from creative and cultural workspace, within the London Plan, with the LDA and in the consultation processes for the Olympic Strategic Regeneration Framework and the Legacy Masterplan Framework.

Funding and other support

Arts Council England London, where possible in concert with other agencies with a cultural and regeneration remit in the host boroughs, should press the case for the establishment, in and for the long term, of Lottery funded capital programmes for social and cultural enterprises such as artists' studios.

Further research would be helpful to understand more clearly a number of issues identified in this research, including the scale and nature of demand for artists' workspace in the host boroughs, the extent of informal workspace models, and the

scale and timing of investment needs of the sector in the host boroughs.

NFASP needs to consider how best to extend its support for the sector among newer, more fragile and less formal groups in the host boroughs and elsewhere, supported by ACE and others.

Potential development partners

The actions proposed in summary above would engage NFASP with the local authorities, their local and sub-regional partnership arrangements, with local delivery bodies such as LTGDC, with the Mayor's agencies and with the Olympic and Paralympic delivery and legacy planning bodies. Further exploration is required with Registered Social Landlords, the Housing and Communities Agency and with commercial developers and owners.

Key Messages from the Research

Studios: an effective and resilient provider of affordable workspace

Studio providers have 40 years of development experience in providing fully-let, affordable workspace for thousands of artists in hundreds of buildings across East and South East London.

These studios support artists at the most fundamental level of development and production, maximising the time they can devote to their art practice. At rent levels half to one third of physically comparable space on the open market, providers create a significant subsidy for art and artists.

However, the accumulation of regeneration pressures, the impact of the Olympic project and the current development climate threaten a resilient and successful sector, which has contributed greatly to London's reputation as the world's leading city for creative and cultural activity.

More than a quarter of the UK's studio buildings are located in the five host boroughs (Greenwich, Hackney, Newham, Tower Hamlets and Waltham Forest). Some three dozen studio providers offer 940 affordable studio spaces for visual artists, with another 2,900 artists on their waiting lists. Only three (of 58) buildings are owned by not-for-profit providers: nearly a quarter have leases of less than five years which are under threat of non renewal.

Studios: demand, and good practice in developing and providing them

Demand for long-term affordable studios in East London remains buoyant, as evidenced by growing waiting lists over the last few years, sustained levels of demand and feedback from artists on waiting lists.

There is no evidence of any immediate threat of over-supply of affordable studios. Developers and planners concerned about this may well be confusing commercially developed "creative workspace" and affordable, sustainable workspace for visual artists which is under consideration in this research and report.

Studio providers demonstrate good practice in developing models for medium- and longer-term use of light industrial and similar buildings.

There appears to be a significant amount of informal, short-term studio space-making with formal and informal groups organising spaces for themselves in a variety of more (and often less) beneficial or sustainable arrangements.

Studio providers, developers and regeneration agencies: mutual benefit

Studio providers are confident that they have a number of development and management models offering property owners and public agencies the certainty of 100% occupancy in well managed workspace, for lower income workers.

Delivery agencies and other public bodies, Registered Social Landlords and commercial property owners have established mutually beneficial long-term arrangements with a range of studio providers.

Studio providers own only a very small number of the properties they occupy. They hold a variety of lease and licence arrangements from commercial owners, public agencies and delivery bodies. Only one local authority directly provides studios to artists.

Studios and their local contributions: reasons for supportive planning and regeneration frameworks.

Artists and studio providers contribute to the local economy, to place making and to the vitality and distinctiveness of local and community life. They contribute greatly to the wider cultural reputation of some boroughs and their local authorities.

Studio provision is neither consistently nor adequately represented in Local Development Frameworks, reflecting a low policy status and priority among local authorities and delivery bodies. At best, it may be covered by statements of intent or priority relating generically to creative workspace.

NFASP and its members need to engage with local planning reviews, master planning opportunities and with the Olympic legacy and London Plan processes.

Affordable, sustainable artists' studio provision has not yet been secured in Olympic legacy discussions and planning and needs

to be differentiated from other cultural and creative workspace.

Strategic agencies: the need for support

The important contribution of affordable and sustainable studio provision for visual artists in their own right is recognised by the Host Boroughs Cultural Partnership Board and within related host borough programmes. However, current and future studio developments are not yet secured within the overall legacy master planning frameworks being developed by LDA and ODA.

ACE's three-year programme intentions up to 2011, offer advocacy support for the sector, confirm existing levels of support for NFASP and a number of providers, but offer no new resources directly to tackle existing studio waiting lists, nor to mitigate or exploit new Olympic impacts.

Olympic Impacts

Property conditions for studio providers are already made difficult by the impact of East London's long-term regeneration agenda and the effect of developments spreading east from the City and Canary Wharf. This has been exacerbated by the increased demand for industrial property in areas surrounding the Olympic park, and most recently by the credit crunch and adverse conditions which developers and builders are facing.

As with other cultural activities and agencies, and others providing affordable cultural and creative sector workspace, studio providers fear that the demands of the Olympic project for extra resources will diminish support and attention to their own demands and requirements.