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# The South London Tech Sector: A Framework for Growth



A Report for the  
South London Partnership

October 2017

# South London Partnership

## The South London Tech Sector: A Framework for Growth

October 2017

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## *Executive Summary*

- i. This report provides a framework to support the growth of the South London Tech Sector; a sector which is growing, dynamic and increasingly important to the wider economy of London and the greater South East.
- ii. The Tech Sector is already a significant component of the South London Partnership (SLP) economy (encompassing Croydon, Richmond, Kingston, Merton and Sutton). It employs 17,000 people, is home to 6,500 businesses and is valued at £1.8 billion of GVA per annum. The sector has also seen considerable business growth, expanding by nearly 50% in the last five years, whilst benefitting from a highly skilled labour market of almost 7 million people.
- iii. The sector will play a vital role in the future evolution of our economy and the delivery of our Growth Proposition. It will act as the conduit for the commercial exploitation of innovation and technology, underpinning regeneration and reinforcing an already strong business and employment base.

## **Exploiting Assets and Overcoming Challenges**

- iv. We anticipate that technology will continue to disrupt and afford new opportunities for sub-sector specialisms in our area, including those rooted in science, manufacturing and professional service-based industries. Alongside our strong asset base and significant locational advantages, this forms the rationale for SLP strategic intervention and investment.
- v. The foundations for South London's continued Tech Sector growth are predicated on:
  - Exceptional tech and enterprise assets, including hubs, incubators, contemporary workspaces, educational institutions and innovation centres.
  - An inherently enterprising and entrepreneurial economy
  - High quality knowledge, skills and innovation infrastructure
  - An extensive and grass roots driven network and support ecosystem
  - A track record of investment and access to financial markets

- The quality of our live, work and play environment.
- vi. The Borough level distinctiveness of South London is also key in shaping future Tech Sector growth. Each exhibit unique characteristics, from sub-sector specialisation and the nature of local assets, to the type of future sector development potential and the extensiveness of wider Science and Tech sector capabilities. This distinctiveness is complementary, meaning that each Borough provides a nuanced tech proposition, whilst also contributing to the collective offer of the SLP area as a progressive and growing tech-based economy.
- vii. Issues driving the case for action are also varied, with some challenges being more acute in certain Boroughs, more than others. Our ambitions for the sector are framed by an understanding of the scale of these opportunities and challenges, thereby channelling resources towards areas where the greatest impacts can be made. We have therefore prioritised our focus for intervention around four primary aims:
- Supporting the development of established tech centres and emerging 'elevators' across South London
  - Embedding tech across the wider South London economy
  - Maximising the inclusive benefits associated with the growth of the Tech Sector
  - To raise the profile of South London as being at the heart of a globally significant tech region
- viii. Factors that are acting as particular barriers to growth include:
- Access to modern, flexible and affordable workspace (including the protection of existing provision)
  - Skills aligning with employer needs and systematic skills gaps
  - The need for the expansion of organic tech networks
  - Continued investment in digital infrastructure
  - the need to evolve the distinctiveness and awareness of South London's identity as an investable tech location

## Delivering Tech Sector Growth Collectively

- ix. Our response reflects our desire to adopt a partnership approach, such that we deliver consistently, enhance local distinctiveness, capitalise on South London's scale and deploy scarce resources efficiently. We also recognise the importance of channelling public sector resources carefully and not at the expense of existing local interventions within our existing tech community.
- x. There is inherent value in the SLP's location at the heart of a wider and globally-significant tech super region, which incorporates Greater London and Coast 2 Capital (C2C) and Enterprise M3 (EM3) Local Enterprise Partnerships. Significant and exciting opportunities are presented, within this wider context, building on collective strengths, influence and the sharing of assets which are critical to Tech Sector growth.
- xi. Delivery will be secured through collaboration, where we focus resources where we can utilise our influence and strategic remit to best effect. A myriad of partners, including our Boroughs, will be integral to taking forward activities, accessing funding, utilising assets and building on existing initiatives.
- xii. We will adopt robust governance to formalise new strategic relationships and to support the delivery of on-the-ground activity. In this context, we will use our collective strengths to access and harness funds from a variety of sources.

## What Next: Our Immediate Priorities

- xiii. To ensure this Growth Framework initiates local action and to set a strong foundation for a programme of future interventions by SLP and its partners, we have recommended a series of immediate priorities. We anticipate these will be delivered or underway within a one-year period, from the launch of this Growth Framework.
- xiv. These are:
  - Supporting the development of new and expanded workspace and protect current stock, to meet the needs of start-up and growing tech-based businesses.
  - Promoting and extending the reach of Tech Sector networks and peer to peer support activities, to develop a thriving and organic ecosystem.

- Supporting an educational system that embeds digital skills at the heart of the curriculum to reflect evolving business demands.
- Facilitating and enabling the integration of technology and innovation within wider sectors, which have scope for growth within South London.
- Developing formal partnership arrangements with neighbouring LEPs, to deliver towards commons goals through effective governance.

# 1. Our Tech Sector Growth Framework

- 1.1 The South London Partnership (SLP) sub-region is *'open for business'*. Diverse, thriving, undergoing a period of exciting and expansive change, whilst also being an important part of the preeminent global city.
- 1.2 Across the five SLP Boroughs of Croydon, Merton, Kingston, Sutton and Richmond, considerable physical and economic growth is projected, while major regeneration schemes and large-scale investments in connectivity will accentuate the locational advantages of the sub-region.
- 1.3 The SLP is outward-facing and committed to exploiting the strengths of its partnership spanning five London Boroughs and beyond. The SLP Growth Proposition, published in 2016, reflects these opportunities and outlines the collective ambitions for the area and its future prosperity.
- 1.4 In parallel, our Local Authority partners have developed distinct Borough level economic development policies, which articulate the investment priorities that will deliver sustainable growth and competitive advantages.
- 1.5 The **Tech Sector has an important role to play in the delivery of our Growth Proposition and Borough-specific economic plans**. The sector will act as the cornerstone for future economic growth, inform skills that are key to employability across a myriad of sectors, establish stronger links between enterprise, educators and key assets across the five Boroughs, be a true beacon of the value and investment potential of the SLP area
- 1.6 Supported by Regeneris and Sharp Business Insights, we have undertaken detailed research to establish the current characteristics and performance of the sector within the sub region, and to provide a framework to support its future growth.

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## SLP Growth Proposition:

### Collective Ambitions

- A Programme for Economic Growth
  - Skills for Jobs
  - Making the Links
  - More than the Sum of the Parts
  - Making Best Use of our Space
-



## What is The Tech Sector?

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- 1.7 The Tech Sector, is a significant and growing component of the UK economy. It is also a critical source of national competitive advantage, in the context of an increasingly globalised digital marketplace.
- 1.1 The Tech Sector is inherently difficult to define specifically, given its rapid evolution and the degree to which it is influenced by technological advances. An understanding of the sector and its nuances continues to be refined and there are number of new evidence sources, which provide a valuable framework for analysis.
- 1.2 This study focuses on two Tech Sector definitions:
- 1) **Digital Tech Sector** – as defined by Tech Nation, emphasising enterprise that is built around core digital competencies and is heavily reliant upon technology<sup>1</sup>.
  - 2) **Science and Tech Sector** – as categorised by the Greater London Authority (GLA), which provides a broader definition of the sector and captures science-based industries which are influenced by digital technologies<sup>2</sup>.

## Why Tech?

- 1.8 Technology plays an increasingly prominent role in our daily lives; at work, when on the move and throughout all aspects of the home. This is particularly true of applications and innovations associated with the Digital Tech Sector, which continues to have transformational impacts on society, while also paving the way for new and exciting economic opportunities.
- 1.9 The UK economy has evolved accordingly and is increasingly tech-focused. Tech Nation 2017 reports that the UK Tech Sector contributes 1.6 million jobs and has an economic value (GVA) of £100 billion.
- 1.10 A combination of factors, including world-leading skills and innovation assets, a supportive investment environment and a legacy of being at the forefront of

<sup>1</sup> Tech Nation's Digital Tech SIC code definition uses methodologies created and developed by Nesta and Tech City UK to develop a robust view of the sector.

<sup>2</sup> The GLA's Science and Tech Sector definition draws upon working Paper 64 from GLA Economics, which provides a definition of the 'Science and Technology' category.

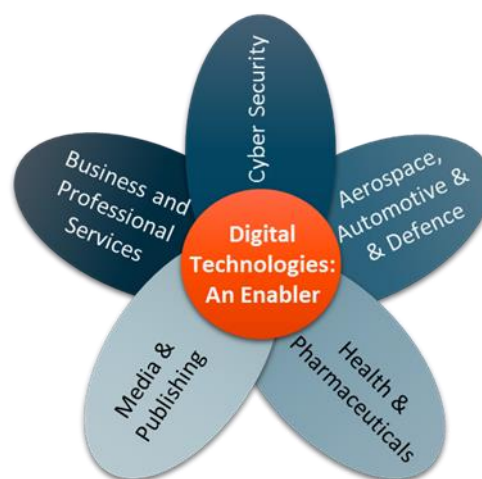
technological advancements, has helped the sector become a critical source of national competitive advantage.

- 1.11 Reflecting this, the development of the Tech Sector is an important policy priority for national government and a prominent part of the 2016 Industrial Strategy Green Paper. Tech has also been a significant focus for the Mayor of London, London LEP and the GLA in recent years reflecting London's position at the heart of the sector nationally.
- 1.12 Emerging thinking from the Mayor of London's response to the Industrial Strategy Green Paper further indicates that technology and digital-focused economic activity is likely to play a significant role within the forthcoming London Industrial Strategy, with an emphasis placed on supporting the growth of the sector and activities that will underpin its future success.
- 1.13 Given the strengths of the Tech Sector within the SLP area, we are well-placed to deliver in the context of these policy drivers, technological evolution and the scale of economic opportunity. The rationale for future investment in the Tech Sector is strong and central to the positioning of an economy which is dynamic, progressive and growing.

## Tech: A Driver for Economic Growth

- 1.14 Tech has the potential to drive the continued growth and development of the South London economy, both as a sector and through its intrinsic value to the evolution of other sectors.
- 1.15 The transformative opportunities associated with a greater policy and investment focus on the Tech Sector are considerable and correlate to each of the SLP's five growth priorities.
- 1.16 This Growth Framework therefore aims to provide a future facing strategy which recognises the importance of tech to our future economy, supporting its future growth prospects.

Figure 1.1 Digital Tech – An Enabler



Source: Regeneris

## South London's Tech Sector: Our Aspirations

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- 1.17 Underpinned by a robust evidence base which maps the sector's value, scale and assets, this Growth Framework outlines our ambitions for the South London Tech Sector. It frames the rationale for intervention, where issues can be addressed and impacts maximised.
- 1.18 We want to support our Tech Sector to continue to grow and evolve, with South London becoming recognised as an established tech-led economy, driven by innovation and enterprise. We want to ensure that all residents are able to benefit from the ongoing tech revolution and the economic opportunities afforded by the growth of the Tech Sector itself, as well as its transformational influence on a wider spectrum of commercial activities.

### Our Aims

- 1.19 We have identified four overarching aims that articulate how we will support the South London Tech Sector:

1. **To support the development of established tech centres and 'elevators' across South London**, emphasising growth potential, local distinctiveness and a culture of enterprise and entrepreneurship.
2. **To embed tech across the wider South London economy**, recognising the significant opportunities for regeneration and investment that exist across the area, and the enabling role that tech can play in supporting the evolution of wider sector specialisms.
3. **To maximise skills, access and participation in Tech Sector**, such that South London's communities can obtain the skills needed to gain meaningful employment and participate in a thriving local labour market.
4. **To raise the profile of South London as being at the heart of a globally significant tech region**, which offers world-class assets, critical mass and considerable collective strengths.

## Taking a Spatial Approach

- 1.20 Reflecting the diverse geography of South London, our aspirations for the Tech Sector take a spatial approach. Critically, this seeks to inform policy and action in a manner which acknowledges the need for targeted and sometimes discrete intervention, which is nuanced and able to reflect the variances in the sector at ground level.
- 1.21 This spatial approach is ingrained within the following principles:
- Using the collective strengths of the SLP and overarching Tech Sector offer to achieve critical mass and maximise the area's competitiveness.
  - Recognising the importance and value of local distinctiveness, with each of the SLP's five London Boroughs having unique tech-based sector offers.
  - Targeting investment towards locations with the greatest potential to expand existing centres and accelerate those with scope for significant 'elevator' growth.
  - Embedding tech processes and innovation within the large-scale growth and regeneration that is planned to take place across South London.

### Local Centres and 'Elevator' Locations

- 1.22 The South London Tech Sector is characterised by a hierarchy of economic activity. There are already a number of established **specialisms for tech activity**, focused around our major town centres. We have also identified several '**elevator**' locations, where there is strong headroom for growth potential based on a myriad of factors from connectivity, to wider sector growth and regeneration aspirations.
- 1.23 While tech cuts across the economy and growth should be encouraged across the whole South London area, these locations provide a focal point for future intervention.

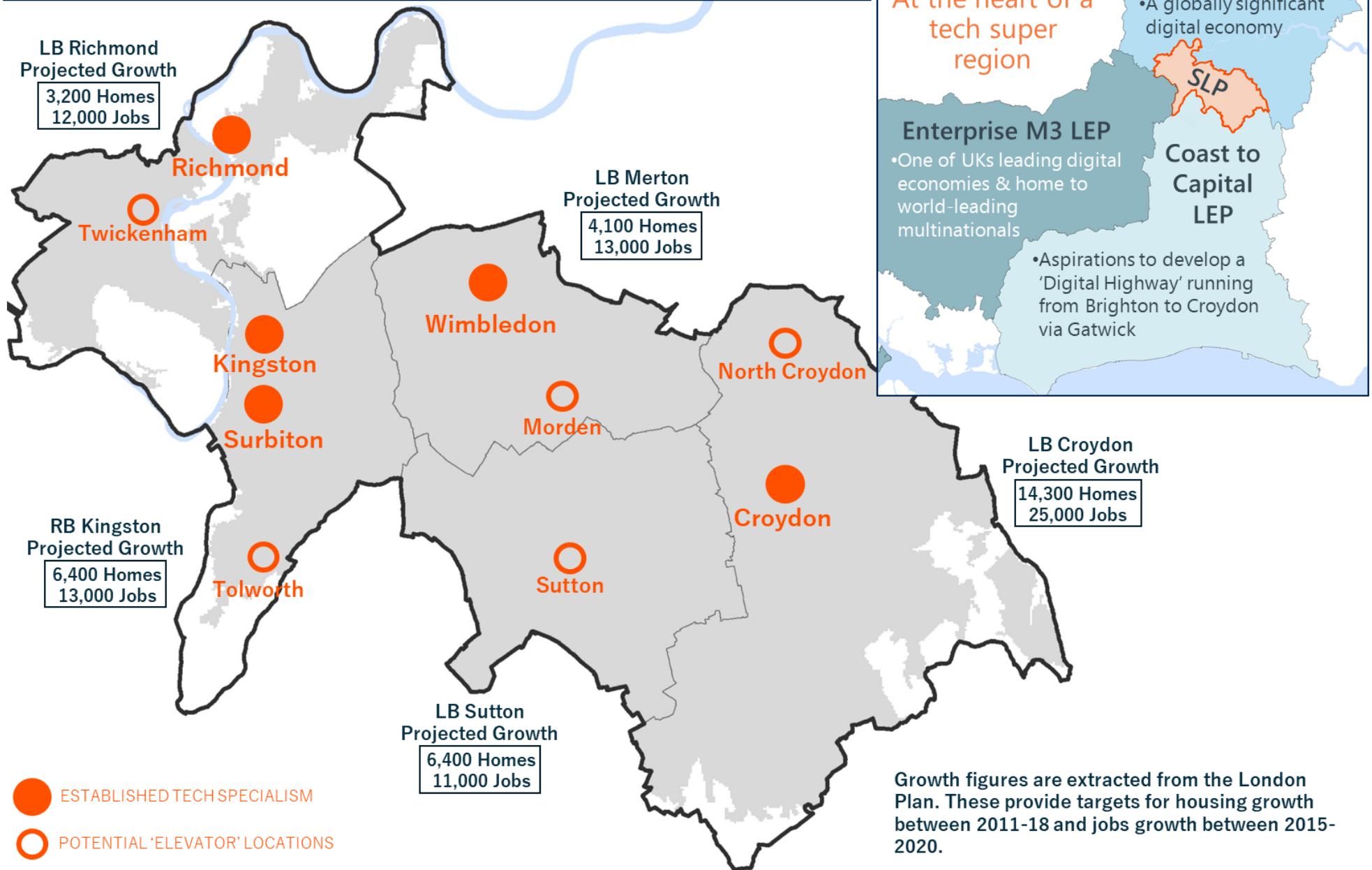
Table 1.1 South London Tech Centres and 'Elevator' Locations

|             | Existing Tech Specialism      | Potential Tech 'Elevator' Location |
|-------------|-------------------------------|------------------------------------|
| LB Croydon  | Croydon                       | North Croydon                      |
| RB Kingston | Kingston upon Thames/Surbiton | Tolworth                           |
| LB Merton   | Wimbledon                     | Morden                             |
| LB Richmond | Richmond upon Thames          | Twickenham                         |
| LB Sutton   | Sutton Central                |                                    |

## South London in a Wider Spatial Context

- 1.24 This spatial approach does not view the SLP area in isolation. We recognise the SLP does not represent a functional economic geography or labour market area, in its own right.
- 1.25 There is significant opportunity to consider the strength of the Tech Sector in the context of our neighbours, including Greater London and the C2C and EM3 Local Enterprise Partnerships.
- 1.26 The Tech Sector has been identified as an important priority for each of these areas, and all three already have globally significant (and diverse) clusters of tech activity. South London sits at the convergence point of these three areas, providing a platform from which to work collaboratively with neighbours and strategic partners to develop and grow a globally-important Tech corridor.
- 1.27 It is also important to acknowledge that tech business activity is not constrained by Local Authority boundaries, as defined by the SLP geography. In reality, enterprise is remarkably dynamic, flexible and driven to access markets, infrastructure and growth assets, based on need and business-specific demands. As a result, South London tech businesses operate in the context of a global marketplace, and utilise an ecosystem of assets and business support which is available in neighbouring London Boroughs and LEP areas.

## South London Partnership: A Spatial Approach to Growth



## 2. Foundations for Success

- 2.1 The SLP area already offers an environment which enables Tech Sector businesses to thrive. The result is a vibrant and dynamic tech-based economy, encompassing wider science-based sectors, with digitisation becoming increasingly relevant.
- 2.2 In recent years, the South London Tech Sector has experienced rapid growth and has become increasing high profile not only in London, but also nationally. Many ingredients have supported the development of the Tech Sector across the area, including organic ground-up and business-led activity; investment into the area by major tech businesses; and targeted public-sector policy.
- 2.3 The South London Tech Sector Evidence Base, which accompanies this Framework, offers a detailed insight into the current performance and characteristics of the sector across South London and the varied assets that underpin it: Some important assets which underpin the sector are introduced below and over the following pages. Supporting this ecosystem of assets to develop and evolve will be critical to the future success of the Tech Sector.

### The South London Tech Sector: Five Defining Characteristics

1. **SCALE:** The South London Tech Sector is already significant in scale: it contributes around £1.7bn per annum to the South London economy, and provides nearly 17,000 jobs across around 6,500 businesses
2. **MOMENTUM:** The South London Tech Sector is growing rapidly, with the number of digital technology businesses increasing by around 2,000 over the past 5 years, representing growth of nearly 50%.
3. **DISTINCTIVENESS:** the sector is ingrained within South London's places, focused around local centres and networks of activity such as Croydon TMRW Hub and Tech City, Wimbletech, and the SW London Tech Cluster.
4. **PROFILE:** while grounded in local distinctiveness South London is home to a number of multinational tech businesses, including PayPal, eBay and Dotmailer, which give the area a profile of global significance
5. **RESILIENCE:** the local Tech Sector is framed within a wider context of local economic diversity, significant labour market and education strengths, strong connectivity, and a strong quality of life; these factors provide a platform for a robust and resilient Tech Sector over the long term.



# SLP Tech Sector Scale & Strengths...

## LB RICHMOND KEY ASSETS



- PAYPAL
- EBAY
- ALLOCATE SOFTWARE
- UNION STREET
- HAYMARKET



- RICHMOND ENTERPRISE & EDUCATION CAMPUS



- SOFTWARE DEVELOPMENT
- HARDWARE MANUFACTURING

## RB KINGSTON KEY ASSETS



- NEW CALL
- IKON SCIENCE
- INTELLIGENT ENVIRONMENTS



- CANBURY WORKS
- MAPLE WORKS
- KINGSTON COWORKS
- KINGSTON NEST
- THE EXCHANGE



- DIGITAL PUBLISHING

KEY



ANCHOR BUSINESSES



PHYSICAL ASSETS



SUB-SECTOR SPECIALISM\*

\*ALL SLP BOROUGHS HAVE SUB-SECTOR SPECIALISMS IN DIGITAL CONSULTING


## LB MERTON KEY ASSETS



- WINSHUTTLE
- METAPRAXIS
- SOFTWAREONE



- WIMBLETECH



- SOFTWARE DEVELOPMENT



17,000  
JOBS



6,500  
BUSINESSES




+46%  
BUSINESS GROWTH  
IN PAST 5 YEARS




6.8M  
POTENTIAL  
LABOUR MARKET


## LB CROYDON KEY ASSETS



- PEGASUS
- MORTGAGE BRAIN
- DOTMAILER




- TMMRWHUB
- MATTHEWS YARD
- SUSSEX INNOVATION CENTRE




- HARDWARE MANUFACTURING
- DATA SERVICES


## LB SUTTON KEY ASSETS



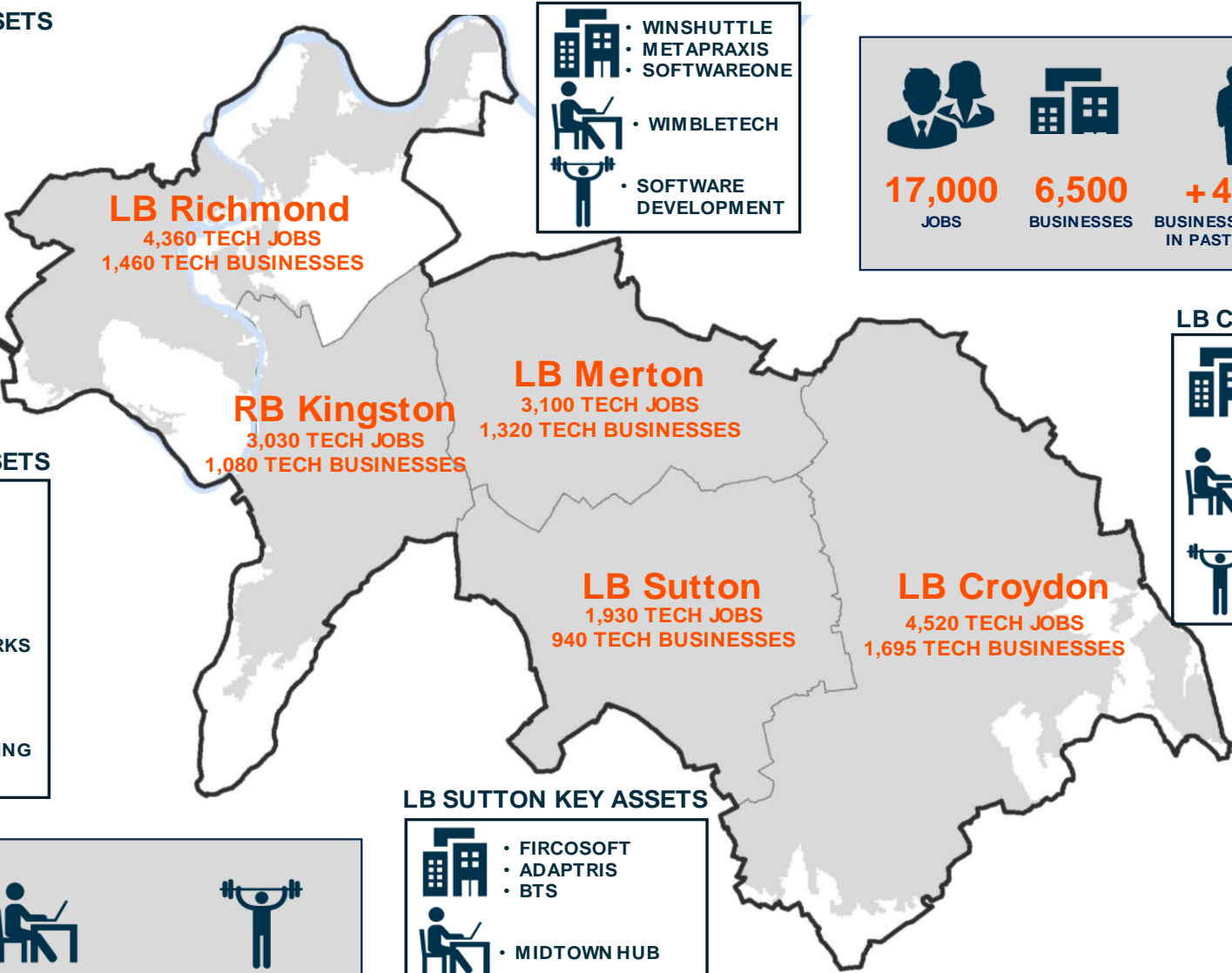
- FIRCO SOFTWARE
- ADAPTRIS
- BTS



- MIDTOWN HUB



- HARDWARE MANUFACTURING





## Tech and Enterprise Growth Assets

- 2.4 The SLP area hosts a variety of tangible assets that provide tech-based companies with the facilities and capabilities they need to expand. Predominantly built around the location of physical premises, these span the breadth of SLP's Boroughs and offer valuable space and assets from which tech-based enterprise can emerge, grow and succeed.

### Tech and Enterprise Growth Assets

- A network of incubators, work hubs and accelerators which provide Tech Sector specific support and work/touch-down space, including the **TMRW Hub** in Croydon and **Wimbletech** in Merton.
- Other assets provide a wider array of facilities, including SME workspace, co-location encouraging clustering and provisions that accelerate the commercial application of innovation. This includes **Kingston Nest**, **Matthews Yard**, **Sussex University Innovation Centre (SINC)** and **Richmond Enterprise and Education Campus**.
- A variety of affordable workspace across the SLP area, including co-working space, incubators and artists' studios, including **Start-up Croydon**, the **Midtown Hub** in Sutton, **Canbury Works** in Kingston, **Wimbledon Arts Studios** and **Richmond Library**.
- SLP's tech business have access to a breadth of business support and information which accelerates growth and the realisation of commercial aspirations. This includes sector-specific assistance offered by **Croydon Tech City** and **Tech City UK** and the **Coalition for a Digital Economy (Coadec)**.
- Wider business support is available via the **London Growth Hub**, individual Borough services including the **Croydon Small Business Commission**, **Chambers of Commerce** and **London & Partners**.

- 2.5 These assets offer competitive advantages and lie at the heart of an ecosystem which has enabled tech-based companies to flourish across the SLP area.

## Tech Networks and Peer to Peer Support Mechanisms

- 2.6 Our Tech Sector benefits greatly from a variety of bespoke and in some cases, discrete networks and business support mechanisms. These have evolved organically and are evidence of an active business community, which has helped to create new networks, tech community collectives and a willingness to share ideas and collaborate. The result is an ecosystem that is inclusive, open and an important component of SLP's attractiveness as a destination for tech-based businesses.

### Tech Networks and B2B Support Assets

- The SLP area benefits from a variety of **B2B networks**, some of which are tech-focused with a loyal enterprise following. This includes **Croydon Tech City**, which provides acts as a conduit for tech companies to engage, gain further insights, understand policy/regulatory changes and also attend topical events. Beyond this, a number of other networks exist, some in less formal guises and over wider geographies, providing a variety of business support and B2B interaction, such as **Shaking Hands**, **SW London Tech**, **Richmond New Tech** and **Digitech Wandsworth**. The area also forms part of the annual **London Tech Week**.
- The SLP Tech Sector harbours an environment which embraces innovation, seeking to maximise the commercial impact of research and technological application. This is evident through the extensiveness of formal and informal activities, including **hackathons** and **meet-ups**, which are regular occurrences across the five Boroughs. This is well-placed to be developed, extending the reach of grass-roots activities, building local support capacity and making an invaluable contribution to a wider ecosystem which supports the start-up and expansion of tech-related businesses.
- Beyond the more complex and technical interactions between businesses and entrepreneurs, SLP also hosts a variety of relevant activity. This includes educationally-focused **coding clubs**, and the gathering of informal and localised business groups, increasing the employability and availability of suitably-skilled labour.

- 2.7 Whilst these elements are integral ingredients of the SLP 'offer', they do not happen in isolation and the intrinsic value of these activities is in the ability for networks to exist and thrive across wider geographic boundaries, not being exclusive to the SLP area.

## Diverse Base of Tech Businesses

- 2.8 We are home to an enterprising economy, which flourishes thanks to a blend of supportive infrastructure, a talented labour market and the quality of life afforded within each of our places. South London is a great location to start a business, including being host to a number of tech-based start-ups, as well as home-based enterprises.

### Business & Enterprise Strengths

- The SLP area has a number of tech specialisms. In trading business terms, **Digital Consulting** and **Software Development** are the most substantial, whilst the quantum of employment is greatest within these same sub-sectors, with **Telecommunications** also prominent. Specialisation varies across each of the constituent SLP London Boroughs.
- The SLP area had over **9,500** business start-ups in 2015, representing **16%** of the total business base. The emergence of new businesses is particularly strong in some locations, such as town centres and areas concentrated commercial activity.
- Self-employment levels across the SLP area are proportionately high, representing some **14%** of the total workforce. Geographically, areas to the North West of the SLP area exhibit the highest levels of self-employment
- Home-working is an important component of the SLP economy and is higher than comparator areas, including London as whole. In total, nearly **60,000** people work primarily for home.
- The presence of large employers, such as **eBay** and **PayPal**, offer significant supply chain and clustering opportunities for Tech Sector businesses. This extends to corporates and anchor public sector institutions, who are becoming increasingly digitised, with operational processes reliant upon technology.

- 2.9 There is an opportunity to build on our enterprising culture and ensure this is a central part of the area's distinctiveness and competitive advantage for tech-based businesses.

## Knowledge and Skills Infrastructure

- 2.10 The SLP area benefits from valuable skills and innovation capital, which is well-positioned to support the evolution of the Tech Sector. This extends through the education system, from schools, sixth form and Further Education colleges to high quality universities.
- 2.11 Increasingly, these educational institutions are working closely with employers, including those from the Tech Sector, to support a skills base that can serve the needs of modern and growing businesses.

### Knowledge and Skills Infrastructure Assets

- SLP benefits from high quality Higher Education institutions, which have an increasing reputation for excellence. They align courses with employer needs and provide graduates with the skills that can make them employable and productive. This includes **Kingston University** and the **Sussex University Innovation Centre (SINC)**, which offer relevant courses and directly support Tech Sector businesses.
- Further Education Colleges across the SLP area, are also employer-led and are continuing to respond to changing skills agendas, particularly around the importance of advocating vocational routes to employment and delivering apprenticeships. **Carshalton, Kingston and Richmond Adult Community Colleges** are all actively providing skilled labour, whilst **Croydon College** is developing proposals for an **Institute of Technology**, responding to the need for digital skills.
- The end-to-end **school system** offers a high-quality education to young people, with an established focus on career development and employment opportunities in the SLP area.
- **Strategic educational relationships** extend beyond the SLP area, with alliances and collaborations extending to neighbouring LEPs, across London and also to corporate partners.
- The SLP Skills Strategy<sup>3</sup> provides a greater degree of insight into local challenges and provides an evidence-based foundation to support the development of tech talent which meets the needs of the local employers.

<sup>3</sup> South London Skills Strategy (2017)

- 2.12 Continued investment in skills and employability is a strong fit with a national agenda, which continues to place great importance on productivity and economic competitiveness.

## Compelling Investment Location

- 2.13 SLP offers a cluster of investable locations; these have developed an identity as centres of tech-based activity, 'open for business', offering the right blend of locational factors and access to finance. The result is a collection of areas which are attractive to businesses of all sizes, securing major inward investment whilst also providing existing SMEs with the ability to scale-up and pursue international trade opportunities.
- 2.14 South London is an increasingly well-known and marketed business destination and a draw for tech-based enterprise, especially around established centres and 'elevator' locations. Further regeneration will continue to strengthen its attractiveness to investors.

### Investment and Infrastructure Assets....

- South London benefits from its locational advantages, as a bridging point between Central London and desirable South-Eastern counties. It attracts a variety of investors to the area, including **multinationals** and **large corporates**, such as Lidl's relocation to Tolworth, **SMEs** and **start-ups**. It has also secured major public-sector relocations, such as **HMRC's commitment to a long-term lease at Croydon's Ruskin Square**.
- The SLP area is subject to large-scale development and regeneration, affording new opportunities for inward investment and a greater tech presence. This includes the proposed development of the **London Cancer Hub** in Sutton.
- Businesses are well-positioned to access international markets and establish strong export pipelines. A wealth of support is available, including **London & Partners' Business Growth Programme** and the **Mayor's International Business Programme**, alongside Borough level activity to identify fast-growing tech businesses, wider support services and grass roots initiatives such as the **South London Export Club**.
- Tech businesses in South London are located within **one of the most active and valuable investment markets in the world**. Access to finance and funding schemes operate to support the needs of businesses at varying scales, from start-ups, rapidly growing SMEs and larger organisations seeking significant capital investment. Funding sources are numerous and include **financial institutions**, the **British Business**

**Bank, angel investors, crowd sourcing and investment available from public sources such as Local Authorities, LEAP and Central Government Departments.**

- 2.15 There is a significant opportunity to reinforce the identity of South London as an investment location, whilst promoting and coordinating the breadth of business support on offer.

## An Attractive Place to Live and Work

- 2.16 South London is an attractive place to live and work, offering a quality environment and access to skilled labour that enterprise requires. The SLP Tech Sector benefits from a considerable and skilled labour market, encompassing large parts of London and the South East at its fullest extent<sup>4</sup>. This provides a significant pool of talent, from which the Tech Sector can recruit (albeit in the context of a competitive and tight labour market).
- 2.17 It also benefits from a tremendous array of retail, leisure, culture, and sports facilities, providing a varied lifestyle offer, clustered around SLP's main commercial and retail areas. The natural environment, including assets such as the River Thames and Richmond Park, also acts as a major draw to prospective employees and investors.

### Labour market strengths...

- The SLP functional labour market area working age population is large and totals **6,825,200**, 11% of which are located in the SLP area.
- SLP exhibits an economic activity rate of **81%**, peaking at **80%** across the functional labour market area, suggesting a high level of labour market participation.
- SLP benefits from a higher proportion of people with higher level qualifications than London and the functional labour market area; **55%** at NVQ4+.
- SLP has a higher proportion of people employed in **higher skilled occupations**, including those most directly related to the Tech Sector, versus London and the wider functional labour market area.

- 2.18 We must work hard to retain and extend access to this labour pool, ensuring the brightest and most entrepreneurial talent is attracted to our Tech Sector businesses.

<sup>4</sup> The functional labour market area represents a more accurate reflection of the workforce that serves the SLP area. This is based on commuting patterns and the inward/outward flow of workers from neighbouring areas, using a lower limit threshold to establish a geographical boundary.

## Local Distinctive Tech Strengths

- 2.19 Our Tech Sector growth prospects are also driven by the distinctiveness of constituent Boroughs and the extent to which the characteristics of these are nuanced but complementary. Each offers a different growth proposition, building on local strengths and specialisms, whilst collectively combining to inform the overarching SLP Tech Sector offer.
- 2.20 The distinctiveness of each Borough is exemplified through respective sub-sector specialisation. Each Borough exhibits its own Digital Tech strengths:

| Table 2.1 SLP – Digital Tech Sub-Sector Specialisms |            |             |           |             |           |
|-----------------------------------------------------|------------|-------------|-----------|-------------|-----------|
|                                                     | LB Croydon | RB Kingston | LB Merton | LB Richmond | LB Sutton |
| Data Services                                       |            |             |           |             |           |
| Digital Consulting                                  |            |             |           |             |           |
| Digital Publishing                                  |            |             |           |             |           |
| Hardware Manufacturing                              |            |             |           |             |           |
| Software Development                                |            |             |           |             |           |
| Telecommunications                                  |            |             |           |             |           |

Source: BRES (2015)

|  |                           |  |              |
|--|---------------------------|--|--------------|
|  | LQ <sup>5</sup> 1.0 – 1.5 |  | LQ above 1.5 |
|  | LQ below 1.0              |  |              |

- 2.21 Our Boroughs are not uniform, supporting different components of a tech-based economy. Whilst Croydon has established strengths in Hardware Manufacturing and Data Services, Kingston is home to Digital Publishing businesses and Merton hosts enterprise whose commercial output is focused on Digital Consulting and Software Development. There are also synergies, however, giving SLP additional Tech Sector significance, collectively.
- 2.22 Considering the wider Science and Tech Sector, opportunities for growth are varied too, with sectors and assets being distributed differently. In this context, Health and Life Sciences activity offers a significant platform from which to develop Sutton's future tech proposition.

<sup>5</sup> A Location Quotient (LQ) is a measure of concentration of activity in one area, compared to another. In this case sector characteristics in the respective areas have been compared to London where a LQ of higher than 1.0 indicates a higher degree of specialisation in the area



- 2.23 Distinctiveness is also apparent when considering how the Tech Sector is being hindered by challenges and barriers to growth. In some areas, these are more significant, such as issues associated with unemployment and deprivation being acute in Croydon. In Kingston and Richmond, permitted development planning policy has constrained workspace supply.
- 2.24 The distinctiveness of our Boroughs is also reflected in the presence of assets; both tangible and intangible. This includes subtle factors that have been drawn out from our research and local conversations, which suggests that the SLP area continues to nurture an environment that supports the growth of the Tech Sector and is an attractor to start-ups.
- 2.25 Within this is a dynamic that incorporates a spirit of entrepreneurship, an ecosystem of peer-to-peer support and a willingness for tech-based businesses to access services and markets across a much wider geography, matching the globalised environment within which they trade.
- 2.26 The key elements that define the distinctiveness of each Borough are outlined in turn overleaf. These qualities are brought further to life by viewing some of the most distinctive local assets in more detail through a series of case studies. These case studies include a range of successful tech businesses, networks, workspaces and events, which offer a platform for Tech Sector growth and success.

## London Borough of Croydon

- There is a considerable mix of both established larger and anchor businesses, alongside start-ups and small businesses looking to be based in or around the Tech Sector. Important businesses include Pegasus, Mortgage Brain and Dotmailer. The tech supply chain is extensive within the Borough.
  - The Borough is a significant draw to businesses, taking advantage of its proximity to London, regeneration schemes and the established 'tech scene', which is well known and the source of considerable on-the-ground momentum.
  - Croydon is home to a number of innovative businesses, with an expanding focus on health and science-related tech, with opportunities to build on links with neighbouring Borough assets.
  - Several different organisations, networks and individuals are driving the sector forward, including Croydon Tech City, SINC, TMRW Hub, Shaking Hands, Business Improvement Districts and Croydon Council.
  - A strong ecosystem of business support, including access to finance (Croydon Enterprise Loan Fund), promotion of growth businesses, with scope to develop sub-regional initiatives with neighbouring LEPs.
  - Croydon benefits from a variety of workspaces, including TMRW Hub and SINC which support and help facilitate collaboration amongst the start-up community.
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Contact: Ben Holt  
Website: [www.sinc.co.uk](http://www.sinc.co.uk)  
Social Media: @sinc\_innovation

**Sussex Innovation Croydon (SINC)** has been providing flexible office space, business support, networking and sign-posting for businesses in Croydon since October 2015. The centre occupies two floors in the iconic One Croydon building (which also houses other tech businesses) next to East Croydon Station with its easy commute to and from Brighton (where Sussex University is based), Gatwick Airport and central London. SINC is now full, with capacity for 30 business tenants, though in time the businesses move on to other offices, often in the same building and others take their place.

SINC's objective is to help create economic growth and jobs for the region and they work with ambitious companies with new ideas who are seeking and able to scale up and grow. SINC provides businesses with physical and virtual membership options, offering a community environment, use of co-working/events space, and a host of networking events and activities. The centre provides support for start-ups, growing businesses and corporate innovation and taps into support from the University via their Catalyst Team programme. This utilises mentored students and graduates of the University to provide flexible and cost-effective support for businesses.

Ben Holt, Director of Sussex Innovation Croydon, is a firm believer in partnership and seeks to find opportunities to work with the 20+ business support organisations in the borough, the Council and other partners to enable start-up and grow-on support for SINC members. His team is currently supporting a new start-up company (Heads above the Cloud which specialises in 3D scanning, Augmented and Virtual Reality) with sales and marketing support to help create a value proposition and to segment their target market. The company has been running since late 2016 and is reviewing options with regards to accessing funding and how best to scale their company.

At the other end of the spectrum, SINC has also supported INTCAS which is set to become the first tech business in Croydon to become a 'unicorn', defined by venture capitalists as a tech start-up company that reaches a market value of \$1 billion through private and/or public investment. The business is a global technology platform that connects students to the global education industry. It enables students to understand their career options and decide their pathway through school, college, university and into employment. INTCAS has been working on the concept since 2010 when they started a 3-year applied research campaign across 27 countries, interviewing over 1,200 families and students and over 1,100 agents, 165 companies across 32 industries to develop a 360-degree view of how students are attracted, recruited and managed. Very much a success story of SINC and for Croydon, they will soon be moving out of SINC and into larger 'independent' office space in the same building.



Contact: Francois Mazoudier, Chairman  
Website: [www.TMRW.co](http://www.TMRW.co)  
Social Media: @TMRWhub

Francois Mazoudier is the founder of **TMRW**, South London's largest Tech Hub and runs Tech Leaders Capital, small investment club made up of Technology CEOs. He successfully responded to a tender invitation from Croydon Council to refurbish a 1960s building, build it and then operate a tech hub within it. The project's purpose is to create new digital businesses and to support relocating businesses by providing office space, mentoring and advice.

Part funded by the Mayor of London the project creates new high-growth companies, keeps innovators and businesses in Croydon and attracts new businesses from outside the borough. TMRW hub delivers this whilst generating a significant income for the Council and is totally self-sustaining requiring no subsidies or contributions from the Council. Having proven that it works well in Croydon, Francois is keen to replicate the model elsewhere if he can find a similarly innovative Council to work with.

Part of the reason he was attracted to Croydon was hard data: with over 30 million rail journeys made annually through East Croydon station, amazing infrastructure and a large, educated, middle class working population, Croydon had all the attributes needed by a tech hub.

The co-working and office space is 21,000 sq ft, provides 350 co-working and dedicated desks, 10 private offices and event space for 350 people. Its café was awarded "Best Independent Café" by the locals and offers a 3D printing lab free of charge to local creators, Gigabit internet and Wi-Fi throughout. The space is divided into chargeable desk space, collaboration space and a corporate innovation area. The latter has 50-desk spaces sponsored by 3 corporate sponsors, the tech start-ups get free desk space in the area and can work on a real project with a corporate. Francois is most excited about this part of the business as it provides a fast-tracked opportunity for innovative companies to find, work with and sell to large SMEs and BigCorp in need of innovation, a real win-win. It is however his role as CEO of Tech Leaders Capital and his extensive black book of tech contacts that is driving the success and corporate support of the TMRW businesses.





Contact: Bradley Mathews, CEO  
Website: [www.alliapp.com](http://www.alliapp.com)  
Social Media: @theallergyapp

Brad Mathews, co-founder and CEO of **AlliApp**. Together with Camilla Bruun, an Immunologist from Copenhagen, built AlliApp, an intelligent, Cloud+Mobile Personal Allergy Tracker. AlliApp is not another social media picture App: it's big, meaningful and truly saves lives. It sits at the crossroads of 3 big tech trends: mobile-everything, Quantified Self and eHealth.

Nearly half the people in the UK have allergies today, and it is growing exponentially, yet nobody has the hard facts to make a proper diagnosis. This platform records and helps identify your allergy trigger/s in record times, backed by real hard facts. The founders have managed to bootstrap it, build a quality team, two products (iOS and Android), get their first few thousand users (without marketing spend or specialist staff), and garnered the endorsement of the NHS (the NHS Trust is now installing their App in the allergy clinics) and are now ready to scale the business.

Brad has been based at the TMRW Hub in Croydon for a year and is speaking with mentor Francois Mazoudier (founder, TMRW Hub) about scaling up. The rest of the team are based around the UK and in Copenhagen but Croydon enables fast transport links and the TMRW hub is a great space with like-minded people, Brad is looking forward to bringing more scientists and developers to the location.

The project is largely self-funded and they are keen to find the right investors to scale up with to ensure the ethics behind the project are kept. They want to 'do the right thing' by keeping the app free at point of use, and work with central government departments (e.g. DWP), clinical commissioning groups, local authorities, health providers, doctors, nurses, health visitors, parents and schools (the list is endless) to reduce sick days. Brad thinks they will only need one round of investment funding to take the app to the next level (version 2.0) to reach 1m people. The main hurdles for the team are (1) finding investors that care about social benefit first and profit second and (2) the time it takes the public sector to approve an initiative - the NHS pilot took 2 years to complete, a lifetime for a start-up business from a cash flow perspective.

The opportunity is there for local Councils to take a funding stake (similar to the model operated by large businesses to other businesses at the Council supported TMRW Hub model) in AlliApp (or similar innovative and ground breaking local businesses) to help this and other similar early stage businesses to reach their objectives. Much like a business angel a Council can (with due diligence and appropriate risk evaluation) advocate for a business, remove or reduce barriers, help signpost and introduce and provide funding at a critical juncture in the growth trajectory of a business. This needn't be altruistic, by taking a stake in a business there is scope for ROI both in terms of cash from the capital investment but also in the case of a business like AlliApp potentially by reducing out of work days and increasing productivity and health benefits for residents and local employees.



Contact: James Hanlon  
Website: [www.getaio.co.uk](http://www.getaio.co.uk)  
Social Media: @MertonChamber

James founded his business MHN 10 years ago in Edinburgh and still manages a team based there. The business has evolved into a consultancy but he retains intellectual property rights to a prototype health tech solution and will revert back to delivering this should funding become available for private pharmaceuticals or the NHS to purchase the product. James came back to live in Croydon several years ago and set up his latest venture **Get AIO**, an innovative expense management app that enables you to front-load a budget for expenses for any staff member and set it to approval quickly and easily via the app – saving both employee and the business time and money.

Get AIO is one of the many examples of businesses based at SINC that are benefiting from the support on offer, the networking and the flexible nature of the centre. SINC also provide free use of the events space once a month for the **'Digital Croydon' meet-up** and have recently taken over providing beer and pizza for the attendees from James who funded this through his own business for the first year and is still supporting Richard Bray, the founder, organiser and facilitator of the monthly meet-up. The event enables networking for developers based in Croydon and neighbouring boroughs, with presentations and discussions.

James is keen to manage his cash flow and breakeven point with his business and is seeking to ensure that he retains and creates optimum opportunities for his business to gain the right type of investment at the right time. His business is new to market, interacts with XERO and other accounting software products, and provides the opportunity for large businesses to manage their expenses across their employees in a more cost-effective way.

Key to the future success of the business for James is managing the sales pipeline and routes to market. As a successful small business owner he understands where his own strengths lie and where he needs support and additional insight. He has turned to SINC for sales and marketing support and often bounces ideas around with both the team and with peers.

## Royal Borough of Kingston Upon Thames

- Kingston has a vibrant mix of tech businesses including those spinning out from Kingston University. Larger employers include BAE Systems, SEGA, Alliance Health, Bausch & Lomb and Nikon.
  - Kingston University plays a big part in the tech scene as an employer, educator of future talent and facilitator of business start-ups, with ambitions to further embed tech into its curriculum and retain graduates within the SLP area.
  - Kingston College has several linked apprenticeship programmes and courses to help upskill young people to work in the local tech scene and to obtain the more general digital skills required in a broader spectrum of occupations.
  - There is an outward-facing tech scene, hosting a range of workshops during Google's Tech Week and London Tech Week, and with South West London Tech Cluster.
  - There are a range of co-working, maker or workspaces available or forthcoming in New Malden, Surbiton, Kingston and Kingston Hill at the University campus, as well as early stage start-up space offered by University faculties.
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Contact: David Randall  
Website: [www.canburyworks.co.uk](http://www.canburyworks.co.uk)  
Social Media: @CanburyWorks

**Canbury Works** is a temporary, flexible workspace club for local businesses formed in December 2016 and launched with the on-site CRE-8 Lab in March 2017. A private limited company with 4 directors, it is 100% owned by the tenant company, London Orthotics Consultancy Limited (LOC). LOC co-created Canbury Works with Maple Works co-founder David Randall in a deal brokered by accountants Kingston Burrowes. LOC vacated the premises when they scaled up to larger space on a nearby plot before the end of their lease term.

The Canbury Park Road site is steeped with innovation and tech history as it is situated between buildings of the historic Sopwith and Hawker aircraft factories, something that Canbury Works draws inspiration from at every opportunity. David Randall, who manages the space with Ben May from the co-located CRE-8 maker space, saw an opportunity to replicate their experiences of co-working and maker spaces like FabLab London and Makerversity. They are supported by Rahul, from Polynomial.

As well as the CRE-8 lab, Canbury Works has event space, desk space and private offices. The venue hosted events during London Tech Week in June 2017 and is already a popular venue for corporate training and development. Resident companies include Indian tech firm Sasken and Korean investment agency YoungUK which links Korean investors to Venture Capitalists who want to invest in small UK businesses.



Contact: David Randall  
Website: [www.mapleworks.co.uk](http://www.mapleworks.co.uk)  
Social Media: @MapleWorks

**Maple Works** was founded in September 2013 and is now fully established with 75 members, a mixture of small businesses and freelancers. It provides flexible, affordable desk space in three open plan offices and has a private meeting room with AV equipment, teleconference phone and complimentary fruit, a 3d printing studio run by BlackEdge 3d, and a hot drinks service point, ice machine for cold drinks, kitchen and patio.

Although Surbiton Station is nearby with easy access to Waterloo, Maple Works is very much a hyperlocal amenity with most service users living in the immediate area. Local people have used it to offer massage therapies, physiotherapy and hypnotherapy (Wellness Works), as well as training and personal development (Mind Works). Charities and community groups are also managed out of Maple Works including Surbiton Farmers Market, Surbiton Festival, Rotary Club and Young Enterprise groups.

Two thirds of the 75 members are creative, digital or engineering businesses including gaming start-up Harmonize Studios, online store All by Mama, and chatbot and engagement analytics start-up, Botskill. Digital Agency Calibrate Digital has recent graduated from Maple Works having scaled from two founders into an 8-person business.





Contact: Ben May  
Website: [www.cre-8.org](http://www.cre-8.org)  
Social Media: @cre-8\_stuff

**CRE-8 Make+Test** is led by founder Ben May, a prototype engineer for 30 years. The lab co-locates four resident experts, who run their own companies and are experienced hardware development professionals, and specialise in equipment (including 3D printing, CNC machining and test equipment) to assist small businesses with the development of commercial end-product as well as early stage conceptualisation. Most maker spaces are very front-end helping to achieve first demonstrator products but unlike CRE-8 less able to help develop concepts through to full production. .

CRE-8 Make+Test is an incubator first, and a maker space second, whereas other maker spaces are typically workshop facilities first and business support second. Being located within Canbury Works, members of the former can use both spaces and benefit from all types of peer to peer collaboration. The ambition is to support local physical product developers, designers, inventors, innovators, entrepreneurs and established product based businesses and the lab is attracting some local design consultancies that lack the facilities of their larger competitors.

The team are reviewing their options for becoming a Community Interest Company (CIC) and other operating models and currently use the CRE-8 brand. They are seeking partnerships, collaborations and funding to develop the concept. Businesses can access both space and experts on a monthly fee basis and pay a small additional charge for equipment use. The team recognise that businesses can run out of capacity to scale-up and learn new skills, and this model allows start-ups to buy additional capacity or sub-contract to the resident experts so that they can focus on other elements of their business without losing ground. Unlike digital tech businesses that can operate virtually, this hardware end of tech works best when the extended team is co-located.



Contact: Dominic O'Meara,  
Founder and CEO  
Website: [www.baagloo.com](http://www.baagloo.com)  
Social Media: #baagloohero

After leaving Saatchi & Saatchi, Dominic O'Meara started his ad agency, Community, 13 years ago in Amsterdam. Recognising the emerging growth in mobile media he founded **Baagloo** Limited in October 2012 in London as a 'mobile first' media channel to support in-store marketing for Clients like Adidas, Canon and Philips. Baagloo has evolved into a fully consumer facing Social Network, the first in the world to share advertising revenue direct with users and their chosen charities.

The app enables users to let friends know which business/place they are visiting, share the location, photos, website and posts. Posts earn advertising revenue in the form of baaCoins, which can be exchanged for cash sent via PayPal to the user or to a charity listed on the site. The more followers, the more views, the more baaCoins earned per post.

Already serving 12million impressions per month, Baagloo has a global user base and last year received funding from a Chinese Venture Capitalist valuing the then fledgling business at £2.75m. The funds were used to upgrade the tech from it's Drupal prototype to a more sophisticated 'lighter' Node.js that can handle larger volumes of traffic as Baagloo begins to scale. The app was a Consumer App of the Year finalist at AppsWorld 2016 alongside competition from the likes of EasyJet.

Dominic describes it as Instagram meets Just Giving meets Trip Advisor and with mobile ad spend set to overtake print this year, reaching \$55bn, he says it is set to sky rocket to \$200bn by 2019. A mere 0.1% of Facebook's traffic would bring 2.1m users to Baagloo, and annual ad revenues of about \$30m. That would propel Baagloo's valuation to about \$300m. The future looks bright for Kingston based Dominic and his team of developers based all around Europe.

## London Borough of Merton

- The Borough is dominated by smaller employers, although some larger businesses, such as Geeks, are located in Merton. A significant number operate from home, flexible locations and in conjunction with other employment.
  - There is a successful and important co-working space and Tech Sector 'cluster' at Wimbletech, gelling the local tech community and attracting interest from outside the Merton and sub-region as well as running initiatives such as HackWimbledon.
  - Merton Chamber of Commerce provides Tech Sector specific business support and has influenced a series of initiatives, including introducing businesses to coding clubs, such as those at Merton Park Primary School.
  - There is a strong appetite from the business community to increase the provision of business support to include advice, help with strategy and finance, accelerator facilities and greater collaboration opportunities.
  - The provision of workspace remains dynamic, with new facilities opening, such as Mainyard Studios.
-



Contact: David Fletcher, CEO  
Website: [www.wimbletech.com](http://www.wimbletech.com)  
Social Media: @wimbletech

**WimbleTech** was founded by David Fletcher 3 years ago when he was looking for local workspace for his start-up tech business, [www.uevoc.com](http://www.uevoc.com). Like many businesses interviewed, he worked with overseas developers and used coffee shops, Google Campus and Wimbledon Library to run the remote teams.

Whilst working at the Library David realised that all start-ups needed was access to power, Wi-Fi, desks and chairs. He approached Merton Borough Council and the Library Service to discuss his vision of developing the 'WimbledonTechCampus' a small tech-hub for start-ups south of the river, in Wimbledon.

The idea was to support start-ups through a collaborative culture of development, learning, celebrating and sharing success by harnessing businesses in the Borough, the support of the Council and Wimbledon Library and by bringing in 'experts' to share insights on finance, recruitment, marketing, etc.

The Council provides reduced rental cost and David keeps the model simple. Providing hot-desking or scale up office space on an attendance or virtual membership model, networking events, monthly meet-ups and larger Wimbledon (Raspberry Pi) Jam conferences. E-newsletters and collaboration tools are used to engage the members, and mentors are sought to help businesses to scale up.

The WimbleTech model has now been rolled out to 10 locations across London, all are central sites and near stations and most are located within under-used spaces in libraries or public buildings. The relevant local authority enables graduated rent for the space and is always involved in the development of the initiative.



Contact: DJ Walker-Morgan  
Website: [www.meetup.com/HackWimbledon/](http://www.meetup.com/HackWimbledon/)  
Social Media: @codepope

Instigated and facilitated by DJ Walker-Morgan (aka @codepope) and enabled by WimbleTech who provide the space for free, **HackWimbledon** is a fortnightly Saturday meet up and a fantastic demonstration of the collaborative and positive nature of the tech community. Funded largely from his own pocket (with a £5 discretionary donation) with support from volunteers, the meet-up, is facilitated by DJ who provides insight and introductions, guidance and encouragement.

Unlike a traditional hackathon which focusses on a shared project, this is a hack space for makers and creators. Users bring a range of projects to the group and the members collaborate, support and add insight into how to develop the project. Group hack challenges are also set. Users projects include electronics, using Raspberry Pi, learning to code (using the Primary School 'Scratch' tool) and more advanced programming.

Attendees were varied and included a teenager and her mother who had attended the WimbleTech Raspberry Pi Jam and who were interested in finding out more; a city worker who runs a code club at his child's school in Croydon; a retired woman teaching herself programming; a student from Kingston University wanting to learn from more experienced peers and an inspirational teacher from a Croydon school learning robotics to be a better teacher and stay one step ahead of her students.



Contact: Ray Kinsella  
Website: [www.mertonchamber.co.uk](http://www.mertonchamber.co.uk)  
Social Media: @MertonChamber

Merton Park Primary School has run an after-school **Code Club** for 10 and 11 year olds for 5 years. The club was started by Nicola Schofield and is attended by between 12-25 children weekly with 4 regular adult helpers with programming experience.

It is part of a network of 5,913 code clubs that reaches 82,000 children in the UK and more internationally. Sponsored by the Raspberry Pi Foundation the network runs 75 projects offering step-by-step guides that help the children develop programming skills whilst creating animations, games and websites. The club has also helped teach digital skills to every class at the school. Apart from undertaking projects using tools like the BBC Microbit to make games, the club also spend a lot of time discussing new technology, how it might work and the implications for data collection, privacy, etc.

The Code Club is well resourced by businesses genuinely excited to help children develop their digital skills. For example, Outofthebit software company taught Year 6 about Games Design and the club visited local Geeks web design company one of 23 small enterprises based at the Generator Business Centre, Mitcham, which is managed by Merton Chamber of Commerce who introduced the business to the Code Club. HSMML worked with Year 6 and the Code Club teaching them about Virtual & Augmented Reality and, separately, years 5 & 6 were told about sound and light engineering by a local expert.

The children are regular participants in 'I'm An Engineer Get me Outta Here' and have visited the Philharmonic Orchestra that held a Virtual Orchestra Day looking at tech and music. The group won prizes in two categories at the National Appathon for their app 'Dig-i-spy' and the presentation category at the IBM Robo Challenge.

## London Borough of Richmond

- Richmond has several high-profile medium and large businesses including PayPal, eBay, Haymarket Publishing, the NPL and Butterworth Laboratories. There is also an active SME tech business base with businesses such as Tech 21 and Online Edge and others who often provide digital marketing support.
  - There is a cluster emerging near Richmond Station, with Reed, Not on the High Street and a series of smaller businesses based in workspaces or in the vicinity.
  - There are a number of existing or forthcoming co-working or maker spaces, including Richmond Library and planned future offered by Haymarket Publishing and Richmond upon Thames College and the National Physical Laboratory.
  - Key business support assets include the Federation of Small Businesses, Chamber of Commerce and Start-up Richmond and Richmond New Tech Meet-Up, which provide mentoring, training and support for pre-starts and start-ups in the Borough.
  - Richmond Adult Community College and Richmond upon Thames College offer skills and training relevant to the Tech Sector and are looking to establish a new Enterprise Hub through the use of the Mayor of London's Regeneration Fund.
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**Richmond MakerLabs (RML)**, founded by Andrés Muñoz Piniella a Director of HUG, is a grass roots member-led project for the community which Ham United Group (HUG) support, fund and host. Promoted as a “*digitally-enabled arts and crafts club, hackspace, a hackerspace, a makerspace, a making laboratory, and a making community*” where people who need or can offer help with anything electrical, mechanical or technical collaborate and contribute to a DIY style.

The space is accessible to the entire community with sewing machine, 3D printers, laser cutters, servers and other tools/equipment available. There is no monthly subscription just a minimum suggested donation of £1 per visit and people are encouraged to join the HUG free membership. It is open every Tuesday evening and typically around 15 people attend.

Andrés Muñoz Piniella founded RML in his spare time during the last 3 of his 10 years working at nearby National Physical Laboratory (see case study), where he worked primarily in Laboratory Facilities Management, assembling and prototypes, calibration, analysis and nano-tech analysis. He joined the Kingston-based CRE-8 Lab resident expert team and launched C4AD CIC, a not for profit Community Interest Company that reinvests profit in the community. Services include laboratory facilities management as well as engineering, making and testing of products. His business is ingrained in S\*T\*E\*A\*M (Science, Technology, Engineering, Arts and Maths) and helps businesses and social enterprises to develop from their prototype.



Founded in 1900, **National Physical Laboratory (NPL)** is one of the world's leading National Measurement Institutes (NMI). Owned by the Department for Business, Energy and Industrial Strategy (BEIS), the mission of NPL is to provide the measurement capability that underpins the UK's prosperity and quality of life, their ethos is that measurement accelerates innovation.

Always at the forefront of science, engineering and technology, NPL has set measurement standards that have a global impact, leading the way in dark fibre, atomic clocks and a vast array of other technology that will create a legacy for hundreds of years and shape the future course of technology. Alan Turing (the WWII code breaker) proposed the Automatic Computer Engine (ACE) at the Teddington site in 1946 and in 1965 Donald Davies developed the concept of packet switching, without which there would be no internet – the key to today's digital world. NPL's work on time is leading the way globally.

NPL's role is highly diverse, working on world-leading science and engineering that impacts healthcare, environmental monitoring, advanced manufacturing and the development of next-generation technologies and techniques with the potential to further transform our lives; from new antibiotics to tackle resistance and more effective cancer treatments, to unhackable quantum communications and superfast 5G. Based in Teddington, South-West London, NPL employs over 500 scientists and is home to 388 of the world's most extensive and sophisticated measurement science laboratories.

NPL also has regional bases across the UK, established to increase both the volume of measurement research in the UK and the impact of the national measurement infrastructure on the UK's prosperity and quality of life, including bases at the University of Surrey, the University of Strathclyde, the University of Cambridge, and the University of Huddersfield's 3M Buckley Innovation Centre.





**STARTUP**  
**RICHMOND**

Wandsworth  
DigiTech

DELIVERING  
REMARKABLE  
GROWTH

**Contact: Helen Roberts**  
**Website: [www.startuprichmond.com](http://www.startuprichmond.com)**  
**Social Media: @Richmondstartup**

**Helen Roberts** has delivered **Start-up Richmond** since 2011 for pre-starts and start-ups from any sector in the LB Richmond and provides monthly events, training, growth accelerator clinics (for 10-12 businesses) as well as mentoring. Initially launched as part of the nationwide Start-up Britain business support programme, Helen has continued to deliver this through her own business, **CPG Executive Consulting** which provides business support for SME's through government backed programmes, despite the government funded initiative coming to an end.

One such project is **DigiTech Wandsworth**, funded by Wandsworth Council and live since January 2017. In its first 5 months' the project supported 550 businesses and provides a monthly meet-up group, online support, masterclasses and workshops on specific themes, including attracting and retaining talent, how to position their business and get ready for funding, and digital marketing. The initiative supports a range of businesses in graphic design, hardware, software, cyber security, biotech and fintech. Attendees include home-workers who are typically difficult to identify and engage. Some work on their business along-side their day job and will go live once their business has been sufficiently established.

Helen is one of the facilitators of the South West London Tech Cluster, plays a key role in supporting Richmond New Tech Meet-up and through DigiTech will work with the two groups to co-host a tech conference in September 2017. She is convinced there is an opportunity to create a tech accelerator in southwest London and is keen to involve corporate tech and Kingston University alongside her other networks.



**SW London**  
**TechCluster**

**Contact: David Randall**  
**Website: <http://swlondon.tech>**  
**Social Media: @SWLondonTech**

The **SW London Tech Cluster** initiative emerged in June 2016 inspired by the highly successful tech ecosystem creation initiative in neighbouring Croydon, 'Croydon Tech City'. A group of local stakeholders are driving the initiative forward including tech PR agent Rose Ross, Helen Roberts from DigiTech Wandsworth and Tech London Advocate David Randall, founder of both Maple Works and Canbury Works.

The initiative is about developing the tech ecosystem in South West London to improve workflows between local members of digital industries, including tech founders, employers, freelancers, mentors, investors, educators, trainers and suppliers. The team are keen to play to the strengths of the area including transport connectivity to London and the rest of the UK, to ensure they are complimentary to but not the same as other clusters and networks. Recognising the value of the organically grown cluster, their definition of tech includes big data, hardware as it interfaces with big data, the internet of things, software and firmware - and they believe that design creates technology as much as anything else.

The peer to peer collaboration involves WimbleTech, DigiTech Wandsworth, Croydon Tech City and TMRW Hub as well as the wider area. Links with DigiTech Wandsworth and Richmond New Tech (RNT) have helped to promote major conferences in Richmond Borough in 2016 and a second conference in Wandsworth in October 2017. Initiatives the cluster is exploring include the creation of a 'local community- led stock exchange' to support local start-ups and growing businesses, which is similar to crowd-funding models.

## London Borough of Sutton

- Sutton has a number of larger businesses including G4S, Reed, Newsquest as well as health-related employers such as The Royal Marsden, The Institute of Cancer Research and Epsom & St Helier Hospital. Sutton is largely dominated however, by smaller tech businesses, dispersed widely across the Borough.
- Business support is provided through a variety of agencies, including the Council, Business Improvement District, Chamber and Federation for Small Businesses, with some links to the Tech Sector via the South West London Tech Cluster.
- Sutton tech businesses provide valuable supply chain support to sector enterprise in neighbouring Boroughs, such as Croydon
- Co-working space is on offer in Sutton town centre, such as the Mid-Town Hub, providing desk and office space, facilitated by Sutton Business Improvement District.
- The Council is leading the London Cancer Hub project, with scope to further to work with science and health tech businesses across the SLP area.





Contact: Andrew Vorster, MD  
Website: [www.AndrewVorster.com](http://www.AndrewVorster.com)  
Social Media: @andrewvorster

**Andrew Vorster** was Vice President of Technology Research and Development at Visa Europe where he worked for 10 years and is a local Sutton resident. Since leaving the organisation in 2014 he has run his own consultancy focusing on horizon scanning technology and supporting organisations to solve their tech based problems.

A story teller at heart, which has roots in his South African heritage, during his last few years at Visa Europe Andrew spoke at over 150 events a year. He has continued to talk as key note speaker at national and international events, like Money 20:20 in Copenhagen in June 2017, about technology and the future. He describes himself as a connector of the dots between challenges and helps businesses to identify ways to solve their technology problems. He believes that most successful companies do not develop in isolation and require collaboration and networking as well as incubation or acceleration to help them excel.

In addition to his own services to large and small businesses across London, he is also a mentor for the Start-up Bootcamp initiative. He would like to provide entrepreneur in residence services to an incubator or accelerator and would be a useful contact for The Exchange in Kingston or for the sub-region to harness to support small businesses. He is particularly excited about the prospects for and energy around the tech sector in neighbouring borough Croydon, seeing it as the 'Silicon South' of London. We were introduced to him through Croydon based networking group and tech enthusiasts, Shaking Hands, who had also introduced him to TMRW Hub founder, Francois Mazoudier. We have since introduced him to SWLTC and Richmond New Tech to review opportunities to contribute to the tech conference in Wandsworth in September 2017.

**GOODCHOICE.IT**  
Strategy | Support | Solutions

Contact: David Lane, MD  
Website: [www.goodchoice.it](http://www.goodchoice.it)  
Social Media: @goodchoiceit

David Lane started **Good Choice IT** 11 years ago (2006), it is a local business and it has evolved with the changing needs of its clients. The company moved from engineering and fixing problems to business and consultancy services and now manage projects and develop strategies to mitigate against cyber-attacks for instance. Their work is more defined by the nature of their clients now than by the tech itself and they no longer provide services to fix laptops or support with software or hardware or website development.

The company provide resources to larger clients who are within walking distance of their business near Sutton town centre or across London and Surrey. Their own staff are fragmented with some outsourced to the Philippines when David couldn't find the local talent to meet his business needs. David's skills include Unix and Windows System Administration, Leadership, and Project Management and he is passionate about explaining how businesses succeed through the use of technology and loves delivering real measurable business benefits for his clients.

### 3. The Case for Action

- 3.1 The case for intervention is informed by a vibrant and dynamic Tech Sector, present and active across South London. This is further reinforced by a strong national economic footprint, supported by an ambitious national policy direction.
- 3.2 Moreover, a combination of grass roots enterprise and a fertile network of business support and growth assets has cemented an established Digital Tech Sector in South London, with considerable scope for further development and expansion.
- 3.3 However, despite positive momentum and sentiment, the evidence base and qualitative insights which underpin this Growth Framework highlight a series of challenges and issues that are acting as barriers to the potential growth of the sector.

#### Unlocking Tech Sector Barriers to Growth...

- Access to modern, flexible and affordable workspace
- Access to a labour market which offers the skills that match business need, in a sector which is dynamic and rapidly changing
- Expanding the reach of formal and informal tech-based networks
- Extending next generation digital infrastructure to all businesses and residents
- Developing a concise and recognisable South London tech 'brand'
- Acknowledging specific barriers to participation and growth impacting the Boroughs

- 3.4 A combination of opportunities, challenges and latent potential, set a clear and powerful rationale for SLP and its constituent Boroughs to take action. Our recommended approach is driven by local sentiment and an understanding as to what has been important to the sector's success, to date. As such, our prioritisation of interventions is shaped by:

- Ensuring public sector interventions are targeted and don't disrupt or hinder the organic nature of existing business-driven and grass roots initiatives.
- Genuine on-the-ground sentiment and business experiences, which offer a richness of picture and expose the most pressing issues.
- The need to invest in a limited number of activities, that will have maximum impact in the context of scarce public-sector resources.

- 3.5 We therefore recommend leveraging the strengths of the SLP partnership to facilitate positive change.

## Tech Shaping the Future of the SLP Economy

- 3.6 Whilst tech-based activities are already having a profound effect on the South London economy, the true potential of this is seen in possible future impacts and how these will play a central role in the delivery of our overarching Growth Proposition. This demonstrates the disruptive and cross-cutting influence of Digital Tech, with its ability to increase our economic productivity, enhance our environment and ensure our citizens are rewarded through prosperous and inclusive opportunity.
- 3.7 Given recent rapid advancements in technology, it is quite conceivable that the impacts of Digital Tech will extend beyond what we can reasonably predict.

Table 3.1 South London Tech Sector – Future Value to the Economy

| SLP Growth Proposition Priority | Tech Sector Value                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A Programme for Economic Growth | <ul style="list-style-type: none"> <li>Tech Sector identified as a priority for SLP's future economic growth potential.</li> <li>Tech Sector has wider relevance to other priority sectors, such as its intrinsic value to Life Sciences and Engineering.</li> <li>Sector benefits from a strong existing business/employment base, Borough level distinctiveness and entrepreneurial activity.</li> </ul>                     |
| Skills for Jobs                 | <ul style="list-style-type: none"> <li>Technical and digital skills are increasingly relevant to all business activity, underpinning SLP's future economy.</li> <li>Education curriculum is adapting to reflect the disruptive impacts of technology and becoming a core educational facilitator.</li> </ul>                                                                                                                   |
| Making the Links                | <ul style="list-style-type: none"> <li>Tech Sector is supporting the delivery of smarter, integrated and more efficient infrastructure and connections.</li> <li>Tech Sector industries driving the need for high quality and ubiquitous digital infrastructure access, at work and home.</li> <li>Tech Sector offers the opportunity to operate flexibly, embrace new ways of working and trading internationally.</li> </ul> |
| More than the Sum of the Parts  | <ul style="list-style-type: none"> <li>Tech Sector has regional relevance offering the chance to establish strategic alliances with London and neighbouring LEPs.</li> <li>Tech Sector offers a compelling 'hook' from which to reinforce the SLP inward investment and FDI proposition.</li> </ul>                                                                                                                            |
| Making Best Use of our          | <ul style="list-style-type: none"> <li>Tech Sector development opportunities support the physical and</li> </ul>                                                                                                                                                                                                                                                                                                               |

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|       |                                                                                                                                                                                                                      |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Space | virtual regeneration of SLP's town and commercial centres. <ul style="list-style-type: none"><li>• Opportunity for public sector estates and spaces to be adapted to develop Tech Sector growth potential.</li></ul> |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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## 4. Actions to Support the Growth Framework

- 4.1 This Growth Framework recommends targeting SLP resources and influence to add value to existing activities. The emphasis is on addressing the issues and opportunities that will create maximum impact, whilst ensuring actions are delivered across the five Boroughs.
- 4.2 The delivery of these actions would require a commitment to collaboration, making effective use of the SLP collective and identifying where Boroughs and wider partners are best-placed to take the lead in delivery. They also support the Mayor of London's aspirations for the sector, which are likely to be prominent within the proposed London Industrial Strategy.

## Aim 1: Supporting the Development of Established Tech Centres and Emerging Elevators

**Rationale for recommended Action:** To ensure that the SLP area builds on its strong foundations as a tech-based economy, reinforcing the importance and competitiveness of existing centres and prospective 'elevator' locations.

Table 4.1 Aim 1 – Priority Activities

| Activities                                                                                                                                                                        | Areas of Focus                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Proposed SLP Outcomes                                                                                                                                                                                                                                                                                                                                 | Lead                                                                              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <b>Priority Activity 1.1:</b><br>Support the development of new and expanded workspace and protect current stock, to meet the needs of start-up and growing tech-based businesses | <ul style="list-style-type: none"> <li>Ensure workspace provision is matched to demand and areas of greatest need.</li> <li>Specification of flexible, shared/open, affordable and well-connected workspace.</li> <li>Build on exemplar delivery models already operating across SLP and London.</li> </ul>                                                                                                                                                    | <ul style="list-style-type: none"> <li>Increase in availability of workspace in tech centres and 'elevator' locations.</li> <li>Baseline of existing provision and exemplar workspaces established.</li> <li>Borough level planning policy used effectively to protect and enhance existing supply.</li> </ul>                                        | Boroughs, working with GLA, existing workhubs, and external providers.            |
| <b>Priority Activity 1.2:</b><br>Promote and extend the reach of Tech Sector networks and peer to peer support activities, to develop a thriving and organic ecosystem            | <ul style="list-style-type: none"> <li>Providing financial support for new and expanded tech support networks and an SLP coordinator.</li> <li>Promote and communicate network and meet-ups to businesses – particularly homeworkers.</li> <li>Explore options to link together different networks and hubs across the area to enhance critical mass.</li> <li>Consider the function and value of adjacent or regional networks for SLP enterprise.</li> </ul> | <ul style="list-style-type: none"> <li>Appointment of an SLP Tech Sector network coordinator</li> <li>Baseline of existing tech networks established.</li> <li>Online promotion of tech networks and peer-to-peer support established</li> <li>New 'satellite' or virtual networks established in each Borough, linked to existing assets.</li> </ul> | Boroughs in partnership with SLP and existing and nascent tech hubs and networks. |

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|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| <p><b>Priority Activity 1.3:</b><br/>Accentuate and communicate the distinctive character and tech-based offer of our centres and 'elevator' locations</p>                                     | <ul style="list-style-type: none"> <li>Investment in assets and infrastructure supporting the growth of sub-sectors.</li> <li>Develop compelling marketing to inform inward investment activity.</li> <li>Exploit links to existing employers, local assets and major development activity.</li> </ul>                                                                                                | <ul style="list-style-type: none"> <li>Borough strategies produced to develop sub-sector specialisms, such as the Health and Life Sciences Opportunity in Sutton.</li> <li>Centre and 'elevator' locations undergoing regeneration and investment in key infrastructure to support Tech Sector growth.</li> <li>Strategic inward investment proposition developed, in tandem with London, EM3 and C2C LEPs.</li> <li>Brokerage of relationships between wider sector employers and local tech businesses</li> </ul> | <p>SLP and the Boroughs, in partnership with workhubs, GLA, LEAP and L&amp;P.</p>         |
| <p><b>Priority Activity 1.4:</b><br/>Ensure a coordinated business support and access to finance offer, which responds to the needs of tech-based businesses and is appropriately marketed</p> | <ul style="list-style-type: none"> <li>Coherent signposting to local, regional (Growth Hub) and national support services</li> <li>Avoid duplication and target investment towards gaps in provision and need.</li> <li>Balance homeworker and micro business needs with those of larger anchor employers.</li> <li>Explore innovative delivery platforms and financial instrument models.</li> </ul> | <ul style="list-style-type: none"> <li>London and C2C Growth Hubs full reflect tech-based business support provision across SLP.</li> <li>Emphasis on online support, enabling universal access across Boroughs.</li> <li>Access to Finance schemes established to support Tech Sector business requirements.</li> <li>Increased business support engagement by tech enterprise.</li> </ul>                                                                                                                         | <p>Boroughs and tech workhubs and networks in partnership with SLP, the GLA and LEAP.</p> |

**What does success look like?** A series of thriving tech centres across the SLP area. Measures of success will include: number of tech jobs and businesses; acceleration of tech businesses; business start-up and survival; increased interaction with the homeworking element of the sector.

## Aim 2: Embedding Tech Across the Wider South London Economy

**Rationale for recommended Action:** To ensure that all components of the SLP economy are tech-enabled, thereby maximising the benefits across a wider spectrum of sectors and commercial activity, particularly linked to planned regeneration and forecasted economic growth.

| Table 4.2 Aim 2 – Priority Activities                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| Activities                                                                                                                                                                  | Areas of Focus                                                                                                                                                                                                                                                                                                                     | Proposed SLP Outcomes                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Lead                                                                   |
| <b>Priority Activity 2.1: Facilitating and enabling the integration of technology and innovation within wider sectors, which have scope for growth within South London</b>  | <ul style="list-style-type: none"> <li>• Emphasis on Creative and Cultural, Life Sciences, Business and Professional Services, Retail and Sports Science sectors.</li> <li>• Consider the importance of major developments (London Cancer Hub).</li> <li>• Brokering connections with assets, institutions and funders.</li> </ul> | <ul style="list-style-type: none"> <li>• Evidence that wider sector businesses are actively using technology and providing supply chain opportunities to local companies.</li> <li>• Actively pursuing the opportunity to embed tech into all new developments, through construction, infrastructure and also enterprise location and start-up occupancy.</li> <li>• Successful bidding for funding to support the commercialisation of innovation and technology across SLP's Boroughs.</li> </ul> | SLP and Boroughs in partnership with businesses, institutions and L&P. |
| <b>Priority Activity 2.2: Enhancing digital connectivity across SLP, securing the highest specification speeds to support business growth and technological application</b> | <ul style="list-style-type: none"> <li>• Ambition to be class-leading, including ultrafast and 5G connectivity across SLP.</li> <li>• Consider fixed and mobile provision and increasing technological convergence.</li> <li>• Adopt innovative approaches to investment and market</li> </ul>                                     | <ul style="list-style-type: none"> <li>• Established strong relationships with commercial suppliers, leveraging further ultrafast fixed and mobile broadband coverage.</li> <li>• Successfully accessed the UK Digital Infrastructure Fund to cover 'not spots' with ultrafast broadband provision.</li> <li>• South London competitively positioned with accelerated 5G coverage, aligned to tech centre</li> </ul>                                                                                | SLP and Boroughs in partnership with GLA and developers.               |

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|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|
|                                                                                                                                                                    | engagement.                                                                                                                                                                                                                                                                                                     | and 'elevator' locations.                                                                                                                                                                                                                                                                                                                                                                                               |                                                                |
| <b>Priority Activity 2.3: Supporting an educational system that embeds digital skills at the heart of the curriculum to reflect evolving business demands</b>      | <ul style="list-style-type: none"> <li>• Pursuing exemplar and trailblazer skills initiatives.</li> <li>• Develop an understanding of business needs and impacts of technology.</li> <li>• Embed digital skills at all levels, from schools through to higher education.</li> </ul>                             | <ul style="list-style-type: none"> <li>• Established an exemplar Institute of Technology at Croydon College, with links to SLP schools and FE Colleges.</li> <li>• Formed strong relationships with tech 'champions' to support a curriculum that creates skilled labour needed by tech businesses.</li> <li>• Commissioned research which outlines future Tech Sector skills requirements.</li> </ul>                  | Boroughs and SLP in partnership with local schools, FE and HE. |
| <b>Priority Activity 2.4: Creating economic development and planning policies which reflect the role of technology in new development and regeneration schemes</b> | <ul style="list-style-type: none"> <li>• Place tech and innovation principles at the heart of design and planning policy.</li> <li>• Explore tech benefits in relation to community cohesion and environment.</li> <li>• Proactive approach removes commercial barriers to investment in technology.</li> </ul> | <ul style="list-style-type: none"> <li>• Economic development and planning policy developed which deploys tech at the heart of sustainable commercial and residential development.</li> <li>• Wider benefits of tech evidenced as part of a significant regeneration scheme in the SLP area.</li> <li>• Evidence that developers are forthcoming with tech proposals and see this as defining SLP character.</li> </ul> | Boroughs                                                       |

**What does success look like?** South London evolves as a future facing economy which has tech embedded at its heart and driving competitive advantages across all sectors. Measures of success will be broad and will include, broadband/mobile coverage, digital skills within the labour market and the evolution and continued competitiveness of the local 'knowledge' economy.



### Aim 3: Maximising Skills, Access and Participation in Tech Sector

**Rationale for recommended Action:** The development of the Tech Sector presents an opportunity to extend the benefits of economic prosperity and employment to disparate and challenging groups, as part of a commitment towards an overarching inclusive growth policy. The development of skills, particularly digital competencies, are likely to be a key component of the Mayor's London Industrial Strategy.

Table 4.3 Aim 3 – Priority Activities

| Activities                                                                                                                                                      | Areas of Focus                                                                                                                                                                                                                                                                                       | Proposed SLP Outcomes                                                                                                                                                                                                                                                                                                                  | Lead                                                                                                            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| <b>Priority Activity 3.1: Maximise the opportunities for employment in tech-based businesses by expanding SLP's culture for enterprise and entrepreneurship</b> | <ul style="list-style-type: none"> <li>Effectively communicating economic opportunity in tech-based businesses.</li> <li>Targeted activity to support start-ups, innovation spin-offs, and homeworkers.</li> <li>Making best use of existing assets, such as workspaces and networks.</li> </ul>     | <ul style="list-style-type: none"> <li>Tech-based advocacy and careers advice embedded within local schools, FE and HE.</li> <li>Increased numbers of tech-based start-ups and other indicators of enterprise and entrepreneurship.</li> <li>Networks and hubs expanding their membership base and reach to new businesses.</li> </ul> | Boroughs in partnership with SLP and existing and nascent tech hubs and networks.                               |
| <b>Priority Activity 3.2: Developing educational projects and initiatives, to respond to Tech Sector employer skill shortages and gaps</b>                      | <ul style="list-style-type: none"> <li>Croydon College Institute of Technology project and Kingston University initiatives.</li> <li>Strengthening employer links with schools, FE and HE institutions.</li> <li>Making informed use of available labour market and skills data/research.</li> </ul> | <ul style="list-style-type: none"> <li>Croydon Institute of Technology established, providing appropriately-skilled labour to SLP businesses.</li> <li>Area Based Review recommendations implemented to address skills gaps and shortages.</li> <li>Curriculum development better-aligned to labour market and skills</li> </ul>       | Croydon College in partnership with Croydon Council and SLP; other FE and HE providers with support of Boroughs |

|                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                            | data.                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Priority Activity 3.3: Expanding access to apprenticeships and vocational routes to employment</b>                           | <ul style="list-style-type: none"> <li>• Exploration of new delivery models and the concept of an Apprenticeship Hub.</li> <li>• Innovative use of the Apprenticeship Levy to support SME training needs.</li> <li>• Providing more effective and integrated careers advice to all learners.</li> </ul>                                    | <ul style="list-style-type: none"> <li>• Apprenticeship numbers linked to tech-related disciplines increased, with effective use of the Apprenticeship Levy.</li> <li>• Awareness and take-up of vocational pathways embedded into careers advice.</li> <li>• Apprenticeships used to provide alternative employment pathways to hard-to-reach and long-term unemployed groups.</li> </ul> |
| <b>Priority Activity 3.4: Increasing ambition and aspiration to participate in meaningful employment within the SLP economy</b> | <ul style="list-style-type: none"> <li>• Using tech/innovation as a stimulus to spark interest in economic opportunity.</li> <li>• Technology used to facilitate innovative outreach to hard-to-reach groups.</li> <li>• Proactive expansion of work experience opportunities, mentoring and traineeships with tech businesses.</li> </ul> | <ul style="list-style-type: none"> <li>• Young people and those looking become economically active pursuing tech-based careers and start-ups.</li> <li>• Technology used to deliver compelling employment and skills messages.</li> <li>• Tech-based companies taking the lead in offering work experience in conjunction with SLP education providers.</li> </ul>                         |

**What does success look like?** A more prosperous South London community, benefitting from stronger skills and employment levels and enhanced levels of inclusion. Success can be measured by skills levels, employment levels, number of tech related apprenticeships and training opportunities, levels of labour market containment, and overall prosperity.



## Aim 4: Raising the Profile of South London as Being at the Heart of a Globally Significant Tech Region

**Rationale for recommended Action:** SLP's location places it at the heart of a globally significant tech region, including London and neighbouring LEPs, providing the foundation for collaboration and access to a wider base of assets relevant to the Tech Sector.

Table 4.4 Aim 4 – Priority Activities

| Activities                                                                                                                                                              | Areas of Focus                                                                                                                                                                                                                                                                                       | Proposed SLP Outcomes                                                                                                                                                                                                                                                                                            | Lead                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| <b>Priority Activity 4.1: Establishing a collective brand and identity for South London and the wider tech corridor, aligned to Tech Sector strengths and ambitions</b> | <ul style="list-style-type: none"> <li>Balance the benefits of location, connectivity, lifestyle and diversity.</li> <li>Opportunity to tie to new and existing events, such as London Tech Week.</li> <li>Tackle negative perceptions, such as geographic location and transport access.</li> </ul> | <ul style="list-style-type: none"> <li>Coherent SLP tech brand created, outlining Borough level distinctiveness and respective tech offers.</li> <li>Increased participation in tech events, such as London Tech Week, and other showcase opportunities.</li> </ul>                                              | SLP in partnership with the Boroughs, existing tech hubs and networks. |
| <b>Priority Activity 4.2: Securing an increase in valuable inward and foreign direct investment based on the strengths of the regional Tech Sector</b>                  | <ul style="list-style-type: none"> <li>Alignment with inward investment and FDI agencies.</li> <li>Establishing regional referral processes and handover of opportunities.</li> <li>Variances in message and the offer need to be carefully considered.</li> </ul>                                   | <ul style="list-style-type: none"> <li>Evidence of tech inward investment success, aligned to work with partner agencies and proactive inward investment marketing.</li> <li>Collective coordination of inward investment, directing tech enterprise to the location most relevant to the sub-sector.</li> </ul> | SLP and the Boroughs in partnership with L&P.                          |
| <b>Priority Activity 4.3: Delivering strategic investment in critical infrastructure need to secure Tech Sector start-ups, accelerated</b>                              | <ul style="list-style-type: none"> <li>Lobbying for new infrastructure.</li> <li>Leverage the benefits from collective procurement and buying power.</li> <li>Rationalise common infrastructure</li> </ul>                                                                                           | <ul style="list-style-type: none"> <li>Working closely with the GLA, LEPs and Whitehall to make the 'case' for tech infrastructure investment.</li> <li>Submission of regional funding</li> </ul>                                                                                                                | SLP and the Boroughs in partnership with GLA, LEAP and                 |

|                                                                                                                                                             |                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                  |                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <b>growth and inward investment</b>                                                                                                                         | <p>priorities, including digital connectivity.</p> <ul style="list-style-type: none"> <li>Sharing of infrastructure assets (Innovation South Science and Innovation Audit).</li> </ul>                                                                                                       | <p>bids and delivery of collective procurements with strategic tech partners.</p> <ul style="list-style-type: none"> <li>Equivalent asset audit undertaken for the SLA area, providing a forensic level of Tech Sector understanding.</li> </ul> | <p>central government.</p>                                                               |
| <b>Priority Activity 4.4: Develop formal partnership arrangements with neighbouring LEPs, to deliver towards commons goals through effective governance</b> | <ul style="list-style-type: none"> <li>Development of common strategy and tech policy positions.</li> <li>Co-development of business cases, funding bids and private sector partnerships.</li> <li>Collective bargaining with Government on matters of strategic tech importance.</li> </ul> | <ul style="list-style-type: none"> <li>SLAs signed with C2C and EM3 LEPs, as well as LEAP.</li> </ul>                                                                                                                                            | <p>SLP in partnership with the Boroughs and LEAP, Enterprise M3 and Coast 2 Capital.</p> |

**What does success look like?** South London successful positioned as being located at the heart of a tech ‘super-region’ and recognised as a tech focused economy, in its own right. Indicators of success will include the delivery of new infrastructure, the number and nature of inward investments, and the level and impact of collaboration with neighbouring LEP areas.

## Priority Activities

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- 4.4 In order to develop and grow the SLP Tech Sector, there are a series of immediate activities that we recommend should be prioritised.
- 4.5 These provide a strong foundation from which to build upon, setting the scene for follow-on action, whilst also enhancing the quality of intelligence at SLP's disposal. These actions are a subset of those identified as part of a wider set of interventions, listed on the following pages.
- 4.6 In conjunction with these activities, we would recommend that SLP develops a **Tech Sector Delivery and Monitoring Framework** that enables it and its partners to:
- Take forward this baseline of the Tech Sector, including businesses, socioeconomic indicators and a record of key assets, such as tech-focused networks and hubs.
  - Provide enhanced monitoring capabilities so that performance and records can be tracked, updated and used to shape the case for future interventions.

## Recommended Immediate Activities

**Priority Activity 1.1: Support the development of new and expanded workspace and protect current stock, to meet the needs of start-up and growing tech-based businesses**

- Further work to ensure workspace provision is matched to demand and areas of greatest need.
- Build on exemplar delivery models already operating across SLP and London.

**Priority Activity 1.2: Promote and extend the reach of Tech Sector networks and peer to peer support activities, to develop a thriving and organic ecosystem**

- Financial support for new and expanded support networks and an SLP coordinator.
- Promote and communicate networks and meet-ups to businesses – particularly homeworkers.
- Explore options to link together different networks and hubs across the area to enhance critical mass.
- Consider the function and value of adjacent or regional networks for SLP enterprise.

**Priority Activity 2.3: Supporting an educational system that embeds digital skills at the heart of the curriculum to reflect evolving business demands**

- Pursuing exemplar and trailblazer skills initiatives lined to the Tech Sector.
- Develop an understanding of business needs and impacts of technology.
- Embed digital skills at all levels, from schools through to higher education.

**Priority Activity 2.1: Facilitating and enabling the integration of technology and innovation within wider sectors, which have scope for growth within South London**

- Emphasis on Creative and Cultural, Life Sciences, Business and Professional Services, Retail and Sports Science sectors.
- Consider the importance of major developments (London Cancer Hub).
- Brokering connections with assets, institutions and funders.

**Priority Activity 4.4: Develop formal partnership arrangements with neighbouring LEPs, to deliver towards common goals through effective governance**

- Development of common strategy and policy positions with regards to tech.
- Co-development of business cases, funding bids and private sector partnerships.
- Collective bargaining with Government on matters of strategic tech importance.

## 6. Roles, Responsibilities and Resources

- 6.1 This Growth Framework, whilst being developed by the SLP, **cannot be delivered in isolation**. In order to achieve our aims, a **partnership approach should be adopted**. Shared ownership will ensure that we deliver consistently, reflect local distinctiveness, capitalise on South London's scale and deploy resources efficiently.
- 6.2 It is also important that this framework is viewed in the context of existing strategies, policies and activity, with the intention of adding maximum value, scaling up impactful local and grassroots interventions, whilst avoiding unnecessary duplication.

### The Role of SLP and Partners

- 6.3 SLP is positioned to support this in its capacity as a **strategic partnership** and will have a distinct role to play in the delivery of the Framework. While SLP will take the lead on certain activities, where it is best-placed to do so, wider ownership and responsibility will be integral to the Framework's success. We anticipate that SLP Boroughs, in particular, will play an important role in progressing delivery and coalescing our priorities with relevant local projects, initiatives and investment.
- 6.4 We have also identified a variety of public sector organisations and bodies who are integral to sector growth: including FE and HE partners, the GLA, LEAP and London & Partners, and neighbouring LEPs such as EM3 and C2C.
- 6.5 Perhaps most critical of all, it will be important to work in close partnership with the private sector. South London's tech spaces, networks and businesses are largely responsible for the organic growth of the sector and support ecosystem to date and, reflecting their experience, knowledge and capacity, should continue to take the lead in driving the future growth and evolution of the sector.

### Governance and Resources

- 6.6 SLP has a robust governance processes in place. There is an opportunity to reinforce these, reflecting the potential for strategic and regional relationships with London and neighbouring LEPs, as well as organisations who can facilitate Framework delivery. We will seek to formalise these, such as securing Service Level Agreements, to ensure our approach to partnership delivery is robust, inclusive and effectively monitored.



- 6.7 Recommended priority activities will require financial investment. This Framework will be delivered by making best use of the SLP partnership, its collective buying and bidding power, as well as leveraging access to funding from individual partners and the private sector.
- 6.8 While public sector funding remains constrained, there are a number of funding sources which could be accessed to support delivery. These include Borough funding streams, GLA and LEAP funding sources (such as the Good Growth Fund which focuses on workspace and the Skills for Londoners scheme which includes the £7m Mayor's Digital Talent Programme), and national funding sources. These funding streams and opportunities to lever resource should be monitored on an ongoing basis, particularly in the context of ongoing political change.

### **A 'Live' Framework**

- 6.9 Crucially, this Framework and Evidence Base should be viewed and used as a live resource: the dynamic nature of the Tech Sector and the fluid political, strategic and economic landscape means that SLP and partners will need to work in a flexible and proactive way to respond to opportunities and challenges as they emerge.

Good evidence is crucial in this: while the support evidence base provides a strong platform of intelligence, it will be important for the SLP and partners to work closely with the local tech community to continually keep 'ahead of the data' in understanding how the local Tech Sector is performing and evolving. The strong existing tech networks and communication lines provide an excellent platform to build on in this respect. SLP has an important role to play in working with the Boroughs to link together these networks and to create critical mass and conversation across the area.



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