







SOUTH EAST  
LOCAL ENTERPRISE  
PARTNERSHIP


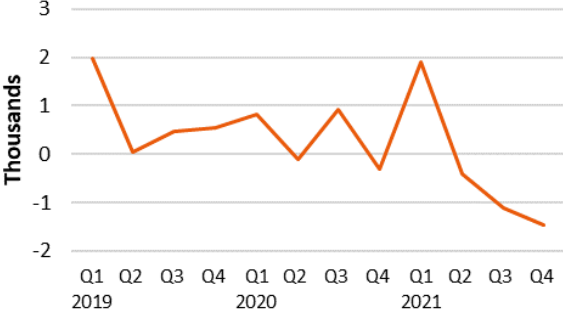
# Economic Recovery and Renewal Quarterly Dashboard


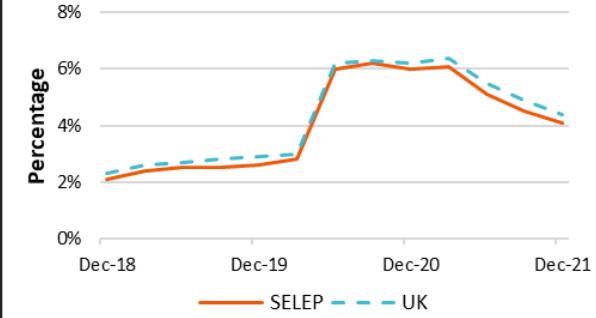

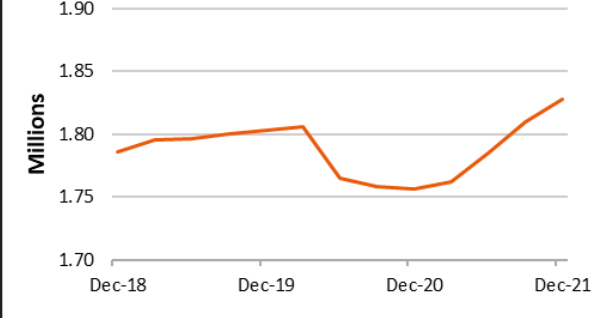

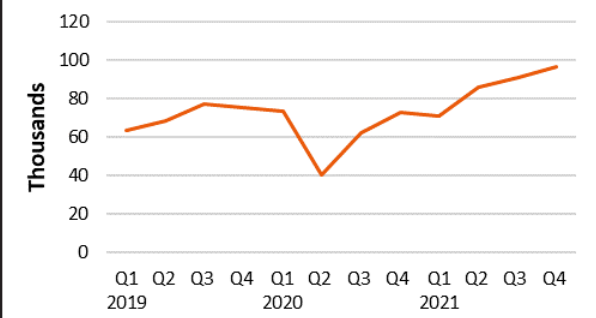
March 2022

# National Context Indicators

QUARTERLY UK GDP		MONTHLY INDEX OF SERVICES		UK NET ENTERPRISE GROWTH		UK UNEMPLOYMENT	
<b>£563.1bn</b>	 <b>1.0%</b>	<b>100.5</b>	 <b>0.4%</b>	<b>-18,980</b>	 <b>-2,500</b>	<b>4.1%</b>	 <b>0.2%</b>
Quarter to Dec-21	Improved on previous quarter	Month of Dec-21	Improved from Sep-21	Quarter to Dec-21	Worsened from Sep-21	Quarter to Dec-21	Improved from Sep-21
Source: ONS	-0.4% down compared to Dec-19	Source: ONS	0.5% up compared to Feb-20	Source: ONS	-27,000 down compared to Sep-19	Source: ONS	0.3% worse compared to Dec-19

# SELEP Indicators

INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
<b>Net Business Growth</b> Source: ONS	<b>-1,465</b> Q4 2021	 <b>-350</b> Worsened from Q3	Percentage of business stock <b>SELEP</b> -0.8% <b>UK</b> -0.7%		<p>After a strong net business growth in quarter 1, the year of 2021 has seen net business closures each subsequent quarter with net closures on an accelerating trend.</p> <p>Net business closure rates since March have been significantly higher across East Sussex.</p>

INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
<b>Claimant Count</b> Source: DWP	<b>103,845</b> December	 11,365 Improved from September	Percentage of population aged 16-64 <b>SELEP</b> 4.1% <b>UK</b> 4.4%		<p>Claimant count has been reducing steadily since February but remains high compared to past levels.</p> <p>The rate for people aged 16 to 24 has reduced most this year and was at 4.4% in December, compared to 4.7% for those aged 25-49.</p>
<b>PAYE Payroll Jobs</b> Source: HMRC	<b>1,827,400</b> December	 17,875 Improved from September	Percentage of jobs Feb-20 <b>SELEP</b> +1.2% <b>UK</b> +1.1%		<p>Payroll jobs have been continuously increasing during 2021 and have been above pre-pandemic levels since September 2021.</p> <p>There have been net job losses in Manufacturing, Retail and Arts &amp; Entertainment over the course of the pandemic, with job growth in Health, Professional services, Administrative services, and Public Admin.</p>
<b>New Job Postings</b> Source: EMSI	<b>97,000</b> Q4 2021	 6,000 Improved from Q3 2021	Compared to same quarter 2019 <b>SELEP</b> +28.8% <b>UK</b> +65.8%		<p>Recent months have seen record vacancy rates, with numbers continuing to increase up to December.</p> <p>Particular hotspots for vacancies relative to the size of the local working age population include Sevenoaks, Maidstone, Dartford, Chelmsford and Lewes.</p>

# Business Resilience and Growth

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
Delivery of the COVID-19 Recovery Fund programme, including business support activities and training for skills. A separate update is available in the Board pack.	318 businesses are accessing business support and 152 business support and visitor economy grants awarded. Over 1000 enrolments/referrals to skills programmes, 331 trained/in training and 74 into jobs.	Total SELEP GVA in 2019 = £98.9bn
Continued delivery of Growth Hub services across SELEP (subject to core Growth Hub funding) and evolution of the Growth Hub delivery model, in line with the national direction of travel for Growth Hubs as it emerges.	740 enquiries and 460 unique businesses (December 21), with activity significantly increased compared to summer months.	Enterprise 3 year survival rates (2020): SELEP 58.2%, England 53%
SAP activities including updated evidence base for the LEP Skills Report and Executive summary of the SAP Skills Report Executive Summary, aligning to Local Skills Improvement Plans (LSIPs).	Executive summary of skills report shared with SAP on 15 February. Promoting SAP member events during National Apprenticeship Week. Feeding into APPG for SME House Builders Call for Evidence on skills. Updated Careers magazine produced with local sector profiles.	Job density per 100 residents aged 16 to 64 (2020): SELEP 76, England 85 (both down compared to 2019)
Supporting Institute for Technology Bid (led by South Essex College) and ensuring alignment to SAP and Major project work.	Successful South East Institute of Technology bid announced with partners including DP World London Gateway, Stansted Airport, Wine GB and Morgan Sindall.	Skills level (2020): Level 4+: SELEP 37.2%, UK 43.0% Level 2+: SELEP 76.9%, UK 78.2% No qualification: SELEP 6.0%, UK 6.6%
DSP activities including drafting Digital Strategy for 2022/23 and working with DSP Chair Professor Hanna-Brown to oversee restructure of Partnership according to the strategy and dependent on funding decisions.	Submission of a year 4 DSP funding case to DCMS at start of February, with decision anticipated in mid to late February.  DSP Strategy to be launched in March.	Apprenticeship starts (2020/21): 24,480. Up 2.4% from 2019/20 and 15.5% down from 2018/19
Launch of new ESF programmes including 'Step Up' to support NEET young people and a community grants programme.	Inception meeting 20 January with programmes now live. First applications for Community Grants submitted and evaluated. National ESF Celebration event on 17 March to include SELEP input.	Apprenticeship vacancies (at 14/02/22): 1,930 (1,681 exc. army). 0.93 per 1,000 jobs.
Developing skills action plan to support Major Projects Group Skills sub-group.	Draft actions agreed with MPG Skills Group on 18 February to be shared for wider feedback.	Highest sectors: health, food & accommodation, information and communications
SSF/ERDF Project: Kent Medical Campus Enterprise Zone.	VIP Opening of Innovation Centre to take place 10 March.	

## KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- Completion of COVID-19 Recovery Fund programmes.
- Monitoring of GBF projects as programme moves towards conclusion and ongoing review of projects which have received approval for retention of GBF funding beyond March 2022.
- Update SELEP Skills website and the data and intelligence pages on the main Selep site inc. strategy indicator reports and bespoke reports.
- Commence Data Analytics Innovation Voucher project with University of Essex, to provide academic support focusing on data gathering around digital skills gaps and provision mapping.
- GPF projects inc. Romney Marsh Employment Hub, The Meeting Place, Enterprise Centre Horizon 120 Business Park & Harlow College remodelling for T levels due for completion in Q1 2022/23.

# UK's Global Gateway

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
Working with Freeport East and Thames Freeport to support full business case development, including to support with Thames Freeport able to begin operations from November as announced in the Autumn Budget.	Thames Freeport submitted its FBC in January 2022. Response expected March/April. Rt Hon Ruth Kelly as Chair is curating composition of the Board. Engagement with Freeport East to support FBC submission in March.	Dover ferry passengers (2021): 3.1 million compared to 4.3 in 2020 and 10.9 million in 2019
Ongoing work through Major Projects Group and MPG Skills group to finalise and publish the MACE report on skills and employment needs across major projects in SELEP area.  Report sets out the combined impact of projects, including a peak estimated workforce of 117,400 between 2025 and 2028.	Mace report completed and discussed with the group January 2022. Recommendations endorsed and action plan in development.  Skills group meeting on 18 February to agree action plan.  Supply chain portal via HGP has been commissioned.	Airport passengers (Q4 2021): 3.1 million which was 50.4% of 2019 level, with UK overall passenger numbers at 45.2% of 2019 level
Working with the DIT ERDF Internationalisation project supporting businesses looking to trade abroad, ensuring promotion and referrals through the Growth Hub.	As of January 2022, a total sum of £821k had been awarded across 108 applications. More promotional events planned for 17 February and 17 March.	Export value of goods (all countries, 2020): £8.3bn (2.9% share of England trade) of which £4.1bn was to EU countries, with overall 18% decline compared to 2019
South East Export Development (SEED) SSF project is working with DIT to address known export barriers in three priority sectors, working to target international markets such as US, Hong Kong, Vietnam, UAE, Ireland and South Korea.	45 Eols received and 18 businesses actively engaged in the project. 17 export readiness meetings have taken place. Trade missions planned in the UAE, Vietnam and Malaysia.	
Work with Transport for the South East and Transport East, to help identify and prioritise transport improvements that will support sustainable movement of goods from our ports. Engagement and feedback to Transport East on draft Transport Strategy.	SELEP response to the Transport East Strategy was submitted January 2022. This was approved by Perry Glading and has been shared with the Board.	

## KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- Next MPG meeting will be held April 2022, following publication of the report and action plan.
- Continue engagement with Freeport East, including participation in innovation, skills, and economic analysis thematic groups.
- Continue to work with Thames Freeport to develop its skills plan.
- Continue to collaborate with industry leads and Maritime UK in our support of the sector.
- Haven Gateway Partnership are establishing a working group to develop the supply chain platform that will support projects within the MPG and beyond.
- Transport for the South East consultation on strategic investment plan commences in June 2022.

# Communities for the Future

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
Housing and Development Group to assess the Levelling Up White Paper and its impact on the housing agenda in the South East at the next meeting.	Meeting on 1st March 2022.	Housing growth (EPC): 17,900 in 12 months to Dec-21, an 11% increase on prior year, with 84% energy efficiency rating A or B.
The South East Creative Economy Network (SECEN) published their Statement of Intent, setting out a refreshed portfolio of sector-led pledges for initiatives that can be delivered in partnership (available to download on the SELEP website).	Statement of Intent published and was endorsed by SELEP Strategic Board in December 2021. SECEN will now work to prioritise interventions and actions for the 2022/23.	Commercial space (March 2020): 33.0 million square meters floorspace.
Successful Homes England and SME Development Finance Virtual Workshop 18/10/21, with a follow up in person event being planned for early 2022.	The date for the follow up workshop is still to be determined.	5 years growth - 0.9 mill sq. metre, 2.8% growth. 0.2% retail growth, 4.7% loss office space, 4.5% industrial growth, 6.8% growth other
Arts Council England/ SELEP Report 'Creative High Streets' finalised and published.	Completion of the report December 2021. Publication and comms activity in February 2022, following webinar launch on 2nd with c.200 attendees.	Construction sector workforce: 124,000 employee jobs in SELEP (2020);
Providing direct industry insight into government around key issues incl. First Homes, Finance for SMEs, Phosphates/Nitrates, Planning and Build Out, Affordable Housing and materials and labour shortages.	Strong engagement continues with monthly meetings with Homes England and DLUHC officials. Seeking to establish new series meetings with new Housing Minister, Stuart Andrews.	Job density per 100 residents aged 16 to 64 – SELEP 4.8, England 3.5; 10.7% increase on 2019 (England reduction of 4.2%)
SSF Project: Accelerating climate-based solutions project. (LA case study areas agreed are Swale, Lewes, Thurrock, and Colchester)	Three businesses recruited for the demand analysis with a further two in pipeline. Land use and habitat mapping completed for all four local authorities.	Digital infrastructure (Sept 2020), percentage of premises with access:
SSF Project: Building Back Better	Following Board approval in February, this project commences activity in March 2022.	Superfast broadband – SELEP 95.5; England 96; Gigabit – SELEP 29; England 46
GBF projects inc. Completion of Tindal Square, The Amelia Scott, Performing & Production Digital Art Facility	Due for completion March 2022.	
GPF Projects: Seven Sisters Country Park Visitor infrastructure uplift and Braintree Active Travel	Newly approved in February 2022.	

## KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- Housing and Development Group discussions, with officials, about concerns in productivity due to adverse market conditions in labour and materials. Engaging local authorities and civil servants on the First Homes policy to maximise the potential benefits and mitigate unintended consequences. Focussing on the impact of the shortages of planners and delays in the system.
- Building Garden Communities roundtable to take place 24 May 2022.

# Coastal Catalyst

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
Ongoing work to develop and utilise enhanced evidence base for coastal work to support prioritisation in delivering the coastal prospectus and wider levelling up.	Evidence base is continually updated and will be presented to the group on 22 February 2022, including levelling up metrics.	Claimant rate population aged 16 to 64 (December 2021): Coastal 5.4%, non-coastal 3.6%, both on reducing trend
COVID-19 Recovery Fund project supporting the South East Visitor Economy, including 100% Revi-VE grant for businesses and development of place-based networks and re-boot campaigns.	115 grants have been paid out totalling £298,762 (66.4% of total grant pot). Element 2 of the project is now well underway with workshops being run through Quarter 4, which will engage 80+ organisations and businesses.	Gross Disposable Household Income (using net household incomes after housing costs) (2018): Coastal 27,000, non-coastal 30,300
Rural working group to prepare submission to the National Food Strategy.	Meeting held 9 February, response to be prepared and submitted to Government in March 2022.	Digital infrastructure (Sept 2021), percentage of premises with access: Superfast broadband – coastal 97.1, non-coastal 94.7; Gigabit – coastal 26.6, non-coastal 30.4
Working with Arts Council England and SECEN to assess how the Creative High Streets work can impact coastal communities, in the context of the levelling up agenda.	Understanding key metrics available. Next SECEN meeting 23rd March 2022. Discussions with Arts Council England on agreed next steps.	Net new businesses per 10,000 working age population (year to Mar-21): coastal 15 (2.7% growth), non-coastal 8 (1.1% growth). The first time in at least 5 years that coastal areas saw higher business growth.
SSF Project: Catalyst for Culture.	330,668 members for performances, 14 new creative commissions, 12 dancers at the Cygnet School, 325 artist & freelancers supported. Final outputs to be reported to SECEN in March.	
GPF Projects inc. Wine Innovation Centre, Britton Farm Development, Digitally Connecting Rural Kent & Medway.	Due for completion in March 2022.	
GPF Project: Food Street in Eastbourne.	Newly approved in February 2022.	

## KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- Rural working and Coastal Communities groups to consider response to Levelling Up White Paper during meetings this quarter – specific dates are currently being determined.
- Regularly updated data and evidence for the Coastal Communities Group.
- Develop a clear plan of action and measurable impact for the Creative High Streets agenda, particularly in coastal communities, engaging with the Coastal Communities and SECEN groups.
- GPF project: Restoring the Glory of Winter Garden due for completion in Q1 2022/23.

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