



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

SELEP Strategic Board

Ashford College

15th December 2017





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Welcome to Ashford College

Paul Hannan

Principal, Ashford College





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National Infrastructure Commission

Adam Cooper

Policy and Engagement Director





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Strategic Economic Plan: Progress

Adam Bryan

Managing Director

Strategic Board

15th December 2017



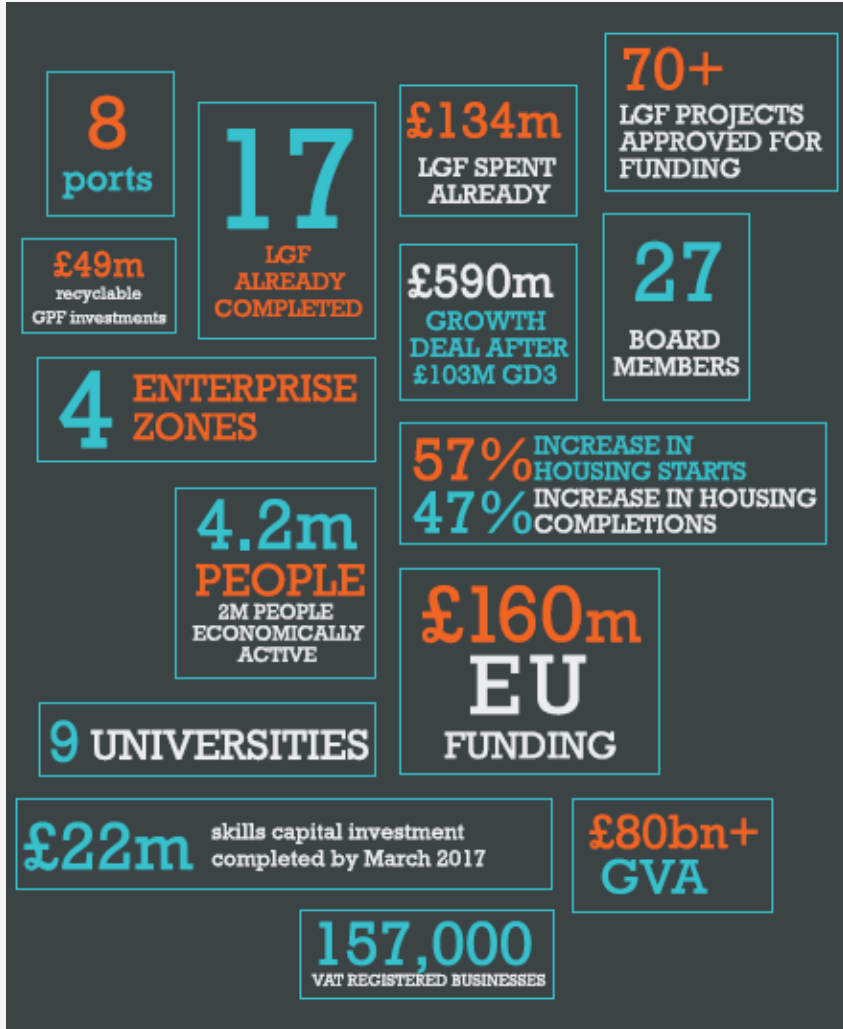
1. Update since September board
2. Structure as agreed
3. Action areas
4. Strategic Ambitions
5. Industrial Strategy
6. Strategic Ambitions II





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Since September



- Evidence base shared
- Consultancy agreement ended
- Strategic ambitions added
- Consultation continuing
 - Robots. Routes. Revenue.
- Industrial Strategy
- Skills Strategy
- Energy





1. **Vision** / shared aim & mission
2. **Define South East** and its challenges
3. **Delivery to date** LGF
4. **Shared Growth Agenda** Define it. Make interventions achievable but scalable in a national policy context (10 points?)
5. **SELEP's role in collaborating to address it** – lobby, influence, working groups
6. **Place-based action plans** – how we respond to the Shared Growth Agenda in the federated areas
7. Immediate **next steps**
8. **Further work** – including issues papers and contextualising other strategy work.

Additionality – Action – Productivity

- Maximising benefit of **LTC**
 - **Thames Estuary** as area for investment
 - Supporting growth in **coastal** areas
 - **Innovation** agenda and universities
 - Iteration of the business support offer through the **Growth Hub**
 - **Creative** freelance hotspot
 - Conditions to help our **ports** thrive
 - Accelerate **housing**
 - **Rural** / natural capital
 - **Digital** infrastructure
 - Principal economic **assets**
 - Role of **Visitor Economy** in supporting growth
 - Capital of **social enterprise**
 - **Tools** afforded by Government
 - Enterprise Zones
 - **Energy**
- 

SEP Strategic Ambitions

A business infrastructure fit to drive UK plc

A digital DNA connecting and energising communities

Resilient places embracing inclusive growth

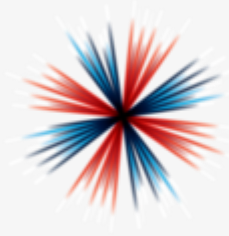
An influential collective voice leading change

Increased productivity driven by innovative businesses and people skilled for the future





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**INDUSTRIAL
STRATEGY**

**Ideas: the world's most
innovative economy**

**People: good jobs and greater
earning potential for all**

**Infrastructure: a major upgrade
to the UK's infrastructure**

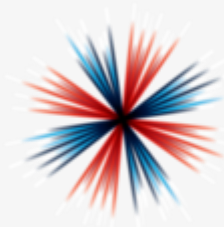
**Business environment: the best
place to start and grow a
business**

**Places: prosperous communities
across the UK**





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**INDUSTRIAL
STRATEGY**

Alignment

A business infrastructure fit to drive UK plc

A digital DNA connecting and energising communities

Resilient places embracing inclusive growth

An influential collective voice leading change

Increased productivity driven by innovative businesses and people skilled for the future

Ideas: the world's most innovative economy

People: good jobs and greater earning potential for all

Infrastructure: a major upgrade to the UK's infrastructure

Business environment: the best place to start & grow a business

Places: prosperous communities across the UK

A digital DNA connecting and energising communities

Increased productivity driven by innovative businesses and people skilled for the future

A business infrastructure fit to drive UK plc

An influential collective voice leading change

Resilient places embracing inclusive growth



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Skills Strategy Update

Louise Aitken, SELEP Skills Lead





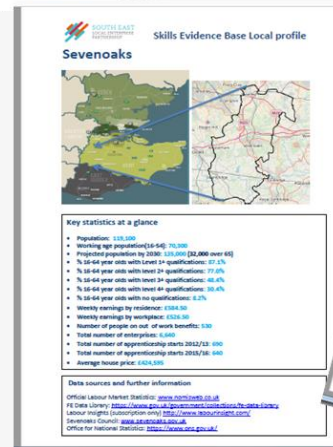
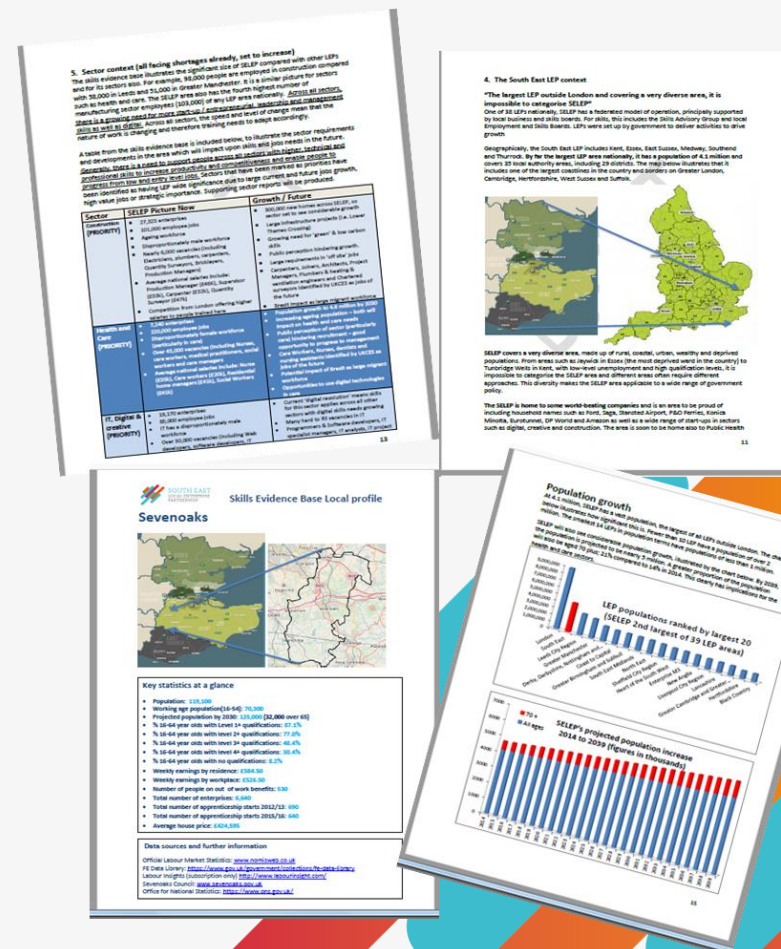
SELEP SKILLS STRATEGY

- SELEP's **Skills Advisory Group (SAG)** agreed that this should be an **employer led concise, ambitious vision** and articulation of shared priorities
- To be **used for lobbying, funding** and **conveying the national importance of the SELEP area**
- Endorsed **by Sector Skills Councils / industry bodies**
- To have **To include a consultation and input from partners**



SELEP SKILLS STRATEGY: PROGRESS

- Draft Strategy – **COMPLETE** and signed off by Skills Advisory Group
- Draft Evidence Base 2nd draft **COMPLETE** and signed off by Skills Advisory Group
- Construction report – **DRAFT COMPLETE**
- District profiles – **UNDER DEVELOPMENT** (Sevenoaks circulated)
- Other key sector reports – **UNDER DEVELOPMENT**
- Brexit and digital reports – **UNDER DEVELOPMENT**

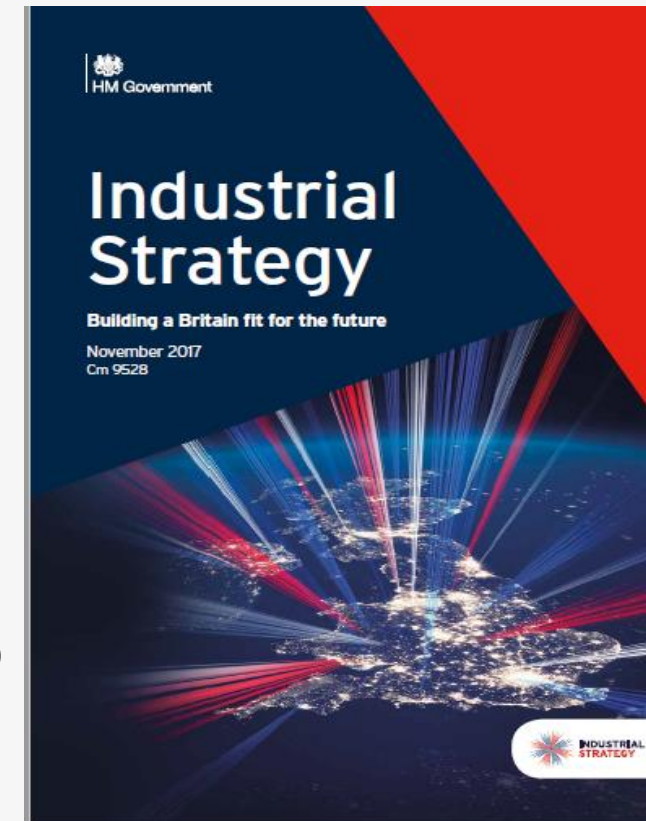




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Skills headlines

- Establish a **technical education system** that rivals the best in the world (T-levels and review of technical education at levels 4 and 5)
- Invest an additional **£406m** in **maths, digital** and **technical** education
- Create a new **National Retraining Scheme** – initially targeting digital and construction (£64m)
- Introduction of **Skills Advisory Panels**
- **Careers Strategy** published £60m for apprenticeships to increase take up by young people and those from disadvantaged backgrounds





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SELEP SKILLS STRATEGY: NEXT STEPS

- Draft strategy and LEP Evidence Base circulated more widely for feedback
- Comments invited by end December/ early January
- Supporting Evidence Base sector reports underway
- Ensuring alignment with LEP Economic Plan & Industrial Strategy
- Feedback at December LEP Board
- Final publication and sector reports early 2018
- Draft action plan underway



Sector Headlines

SECTOR	SELEP PICTURE NOW	GROWTH
Construction	<ul style="list-style-type: none"> • 27,325 enterprises • 98,000 employee jobs • Ageing workforce • Over 6,000 vacancies • Disproportionately male workforce 	<ul style="list-style-type: none"> • Up to 300,000 new homes • Large infrastructure (i.e. Lower Thames Crossing) • Green & low carbon need
Health & care	<ul style="list-style-type: none"> • 7,240 enterprises • 222,000 employee jobs • High proportion female workforce • Over 45,000 vacancies 	<ul style="list-style-type: none"> • Population growth to 4.6million by 2030 • Increasing ageing population • Impact of digital tech • Potential impact of Brexit on migrant workforce
IT, Digital & Creative	<ul style="list-style-type: none"> • 19,170 enterprises • 85,000 employee jobs • Disproportionately male workforce • Over 30,000 vacancies 	<ul style="list-style-type: none"> • Digital revolution (robotics, self driving vehicles) illustrates cross cutting nature of sector • Hard to fill vacancies
Finance	<ul style="list-style-type: none"> • 3,020 Enterprises • 42,000 employee jobs • Strong relationship to London (commuting) • Over 8,000 vacancies 	<ul style="list-style-type: none"> • Trend for some finance companies to relocate from London to parts of LEP due to available workforce / lower rents • Growing IT (Software Skills)

Sector Headlines

SECTOR	SELEP PICTURE NOW	GROWTH
Engineering & Manufacturing	<ul style="list-style-type: none"> • 103,000 employee jobs • Nearly 12,000 vacancies • Disproportionately male workforce • Ageing workforce 	<ul style="list-style-type: none"> • Public perception of sector hindering recruitment • Ageing workforce increasing replacement demand and technical, high skills
Transport and Logistics	<ul style="list-style-type: none"> • 6,270 enterprises • 79,000 employee jobs • National and international significance (SELEP has 9 ports, high speed rail and regional airport capacity) • Over 8,000 vacancies 	<ul style="list-style-type: none"> • Impact of digital and robotics • Airport and port expansions as well as large warehousing (i.e. Amazon)
Professional, scientific & technical (cross cutting)	<ul style="list-style-type: none"> • 27,950 enterprises • 109,000 jobs • Over 9,0000 vacancies • High level, technical roles 	<ul style="list-style-type: none"> • Technical and high skilled roles likely to increase
Agriculture and Land-based	<ul style="list-style-type: none"> • 6,000 enterprises • 1,000 vacancies 	<ul style="list-style-type: none"> • Important to food security and potential move to UK if imports become more costly • Innovations in areas such as wine production could see more growth

We can make some future predictions based on:

Public Health England relocation to Harlow (Essex) from 2019

Bradwell Power Station (Essex) new build (pre-planning stage only)

Amazon Fulfilment Centre location (Tilbury, Thurrock) – recently opened and still recruiting (2017)

Lower Thames Crossing (Essex, Southend, Thurrock and Kent) (timings to be confirmed)

Cross Rail Essex routes – to 2020

Harlow Enterprise Zone (Essex)

Southend Airport Growth

Stansted Airport (Essex) growth

Port of Tilbury (Thurrock) growth

London Gateway (Thurrock)

Wind farms (Greater Gabbard, Gunfleet Sands, London Array)

Better Queensway Development (Southend)

Up to 300,000 new homes to 2030 across SELEP area

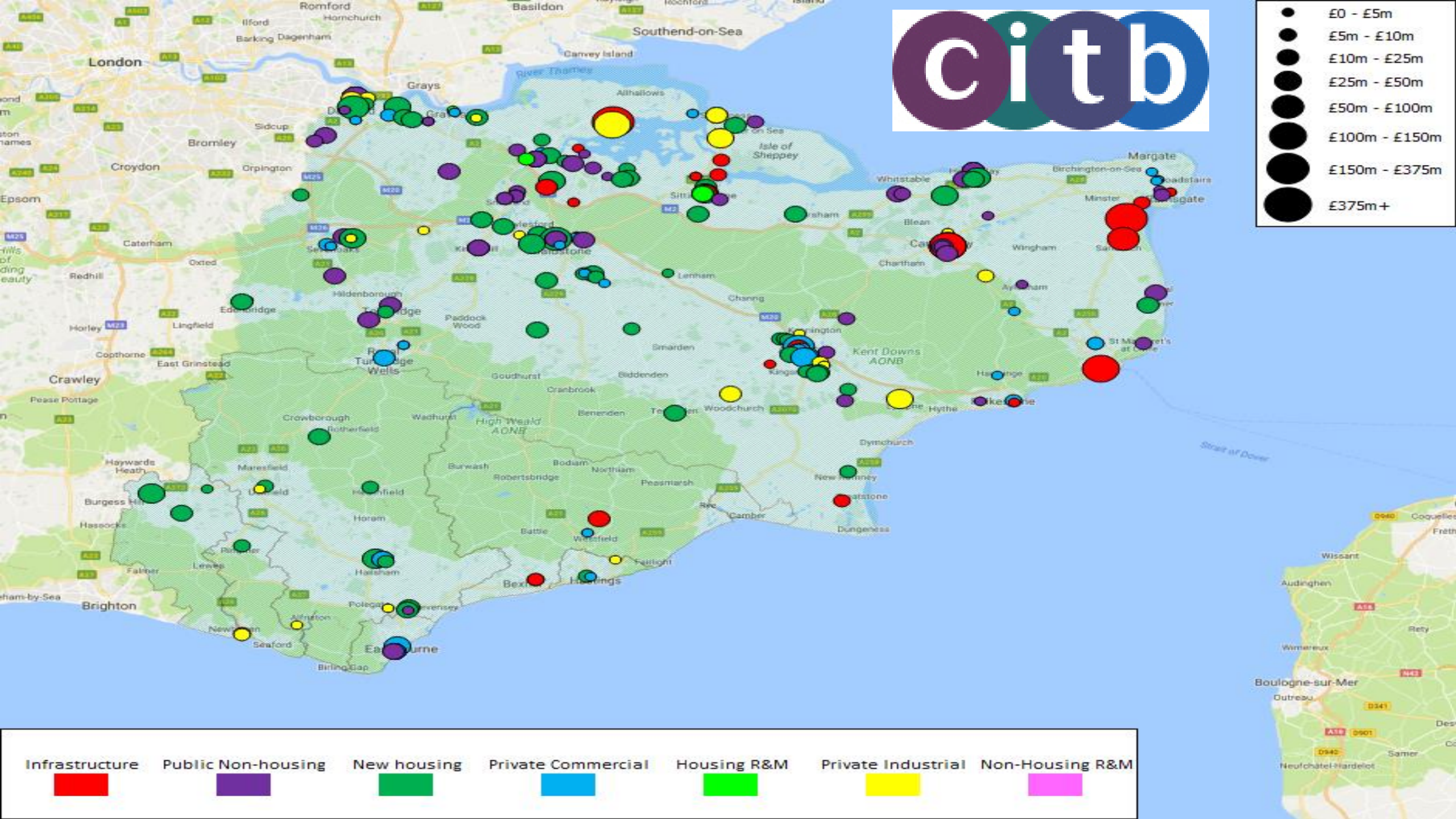
Discovery Park (Sandwich, Kent)

Elwick Place Development Ashford (Kent)

Sittingbourne Town Centre regeneration (Kent)

London Entertainment resort (previously Paramount) – plans only

Growth of Gatwick Airport



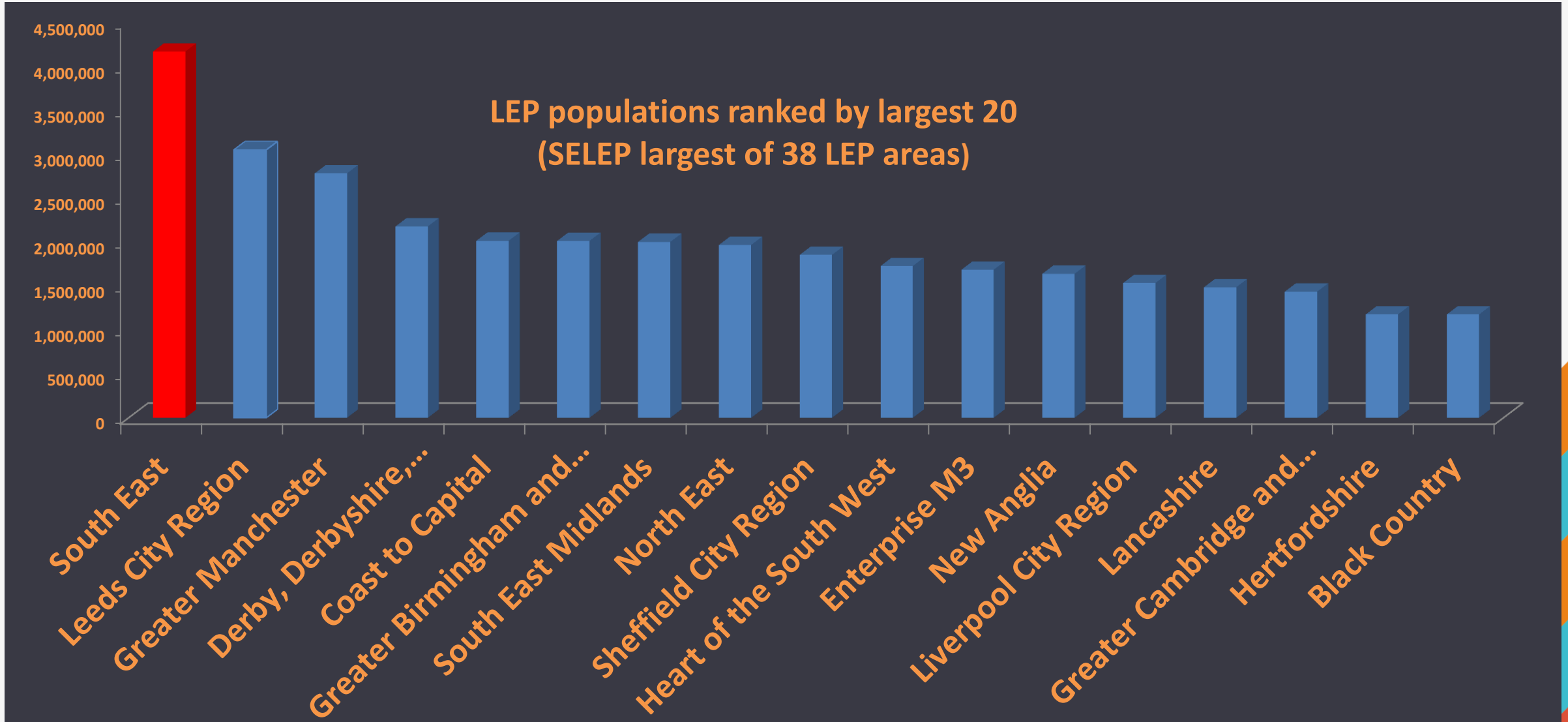
Evidence Base Headlines

- The SELEP area has large numbers of employees and / or enterprises in health, care, manufacturing, construction, finance, IT & creative, logistics and finance.
- There are also large numbers of vacancies and projected growth due to factors such as 300,000 new homes projected across the SELEP area and specific events such as Public Health England's relocation.
- Apprenticeship starts across the SELEP area have stayed fairly static over the last few years, remaining at around 32,000 in the context of a nearly half a million 15-24 year olds.
- The SELEP area has had nearly 368,000 job vacancies in the past 12 months, with large numbers in priority sectors.





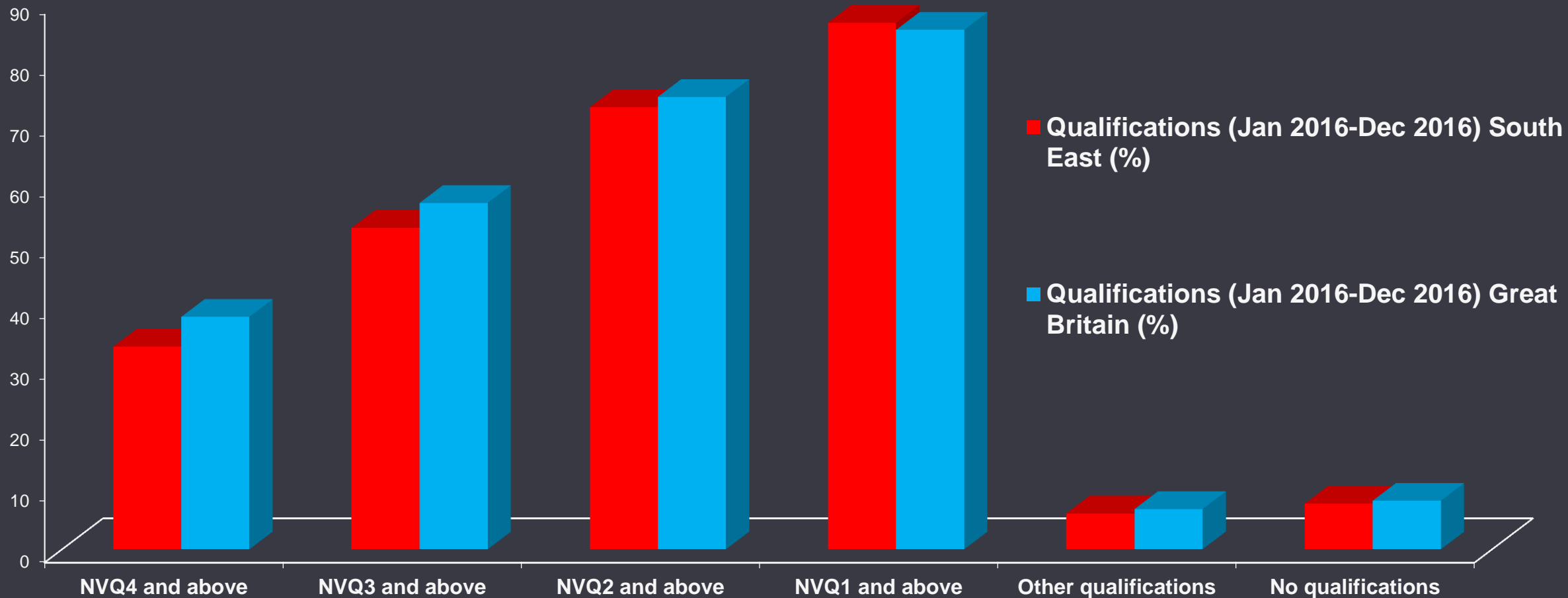
Evidence Base: Size and Scale





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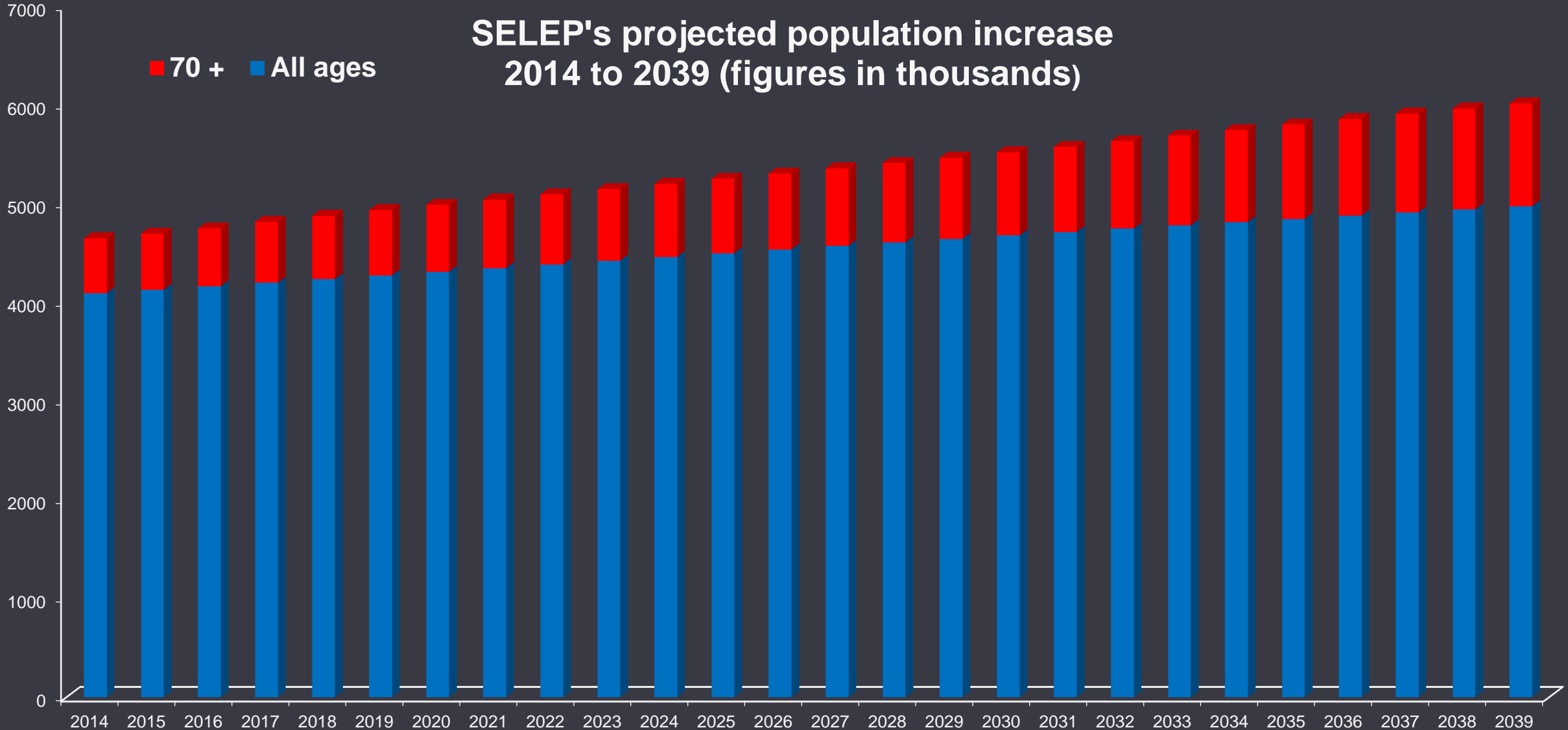
Our Skills Levels are below average and significantly below other LEP areas





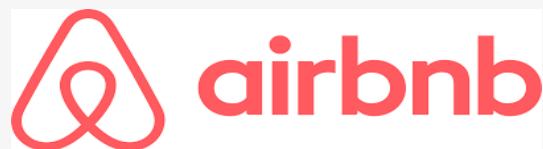
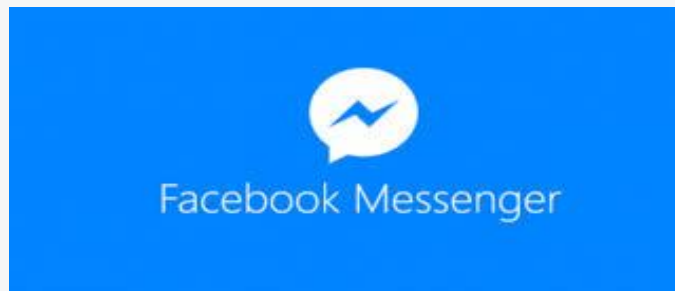
Growth is coming!

SELEP's projected population increase
2014 to 2039 (figures in thousands)



Growth is coming – the fourth Industrial Revolution

Things that didn't exist 10 years ago





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SKILLS STRATEGY: Draft Vision

To help deliver a flourishing and inclusive economy across the biggest LEP in the country by equipping employers, adults and young people with the skills, conditions and aptitudes required for significant growth today and tomorrow.





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SKILLS STRATEGY: Draft Priorities

As educators, local authorities, employers, voluntary sector, employers and providers we agree to:

- *Increase apprenticeships and industry relevant qualifications for all ages, particularly in priority sectors and at higher and degree level*
- *Simplify the landscape for employers, stakeholders and individuals*
- *Build an inclusive economy and reduce polarisation*
- *Raise awareness of jobs and growth across SELEP and the area's size, scale, national and international significance*
- *Foster the spirit of pride, innovation and enthusiasm across SELEP to bring about change*

SKILLS STRATEGY: Existing / developing work

- Supporting the **Enterprise Adviser Network in schools** (LEP wide meeting in Kent (September))
- Supporting a **local authority apprenticeship levy proposal** concept developed by Kent County Council)
- Investing in **infrastructure and facilities** through LGF
- Developing shared priorities and actions for ESF and future funding
- Exploring **new solutions** to problems (Skills portal)
- Working with partners such as National Careers Service) on **apprenticeship videos** and more

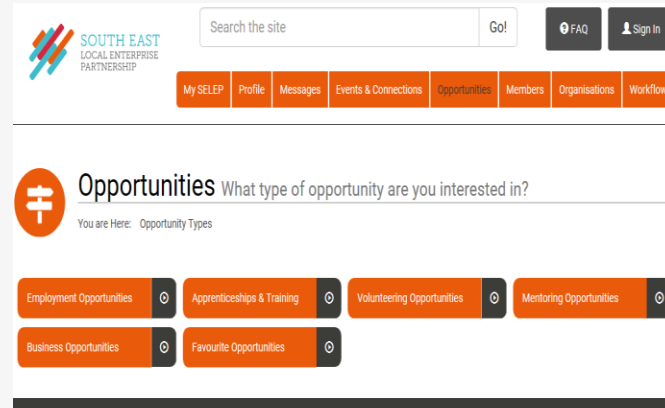
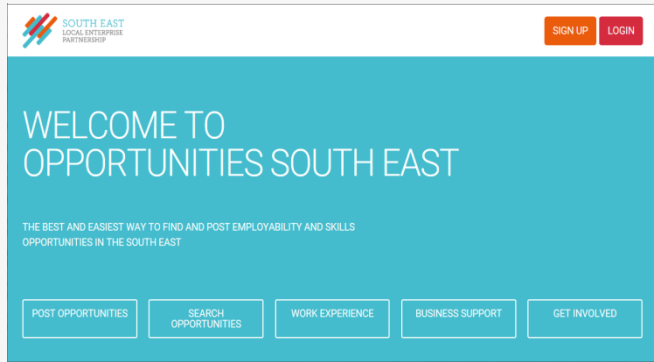




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Emerging Project ideas and priorities

You can try out the pilot skills portal at <https://my.opportunitiesoutheast.co.uk>

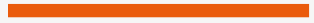


Virtual Reality for all sectors





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FURTHER INFO

<http://www.southeastlep.com/skills>





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Capital Programme Update

Rhiannon Mort

Capital Programme Manager


SELEP Strategic Board

15th December 2017



Capital Programme Management

Highlights

- A total of **20 projects completed** to date
 - **£134.373m** LGF spend to date (as reported in October 17)
 - **78** Projects approved by the Accountability Board
 - Accountability Board has awarded **£454.263m** to date
- 

Capital Programme Management

Projects completed to date

Swallows Business Park	Tonbridge Town Centre Regeneration
Sovereign Harbour	M20 Junction 4
Colchester Broadband Infrastructure	A26 London Rd/ Speldhurst Jct/Yew Tree Jct
Colchester LSTF	Maidstone Gyratory Bypass
Colchester Town Centre	Folkestone Seafront on site engineering works
Thames Gateway South Essex – LTSF (Essex)	Rathmore Road
A414 Maldon to Chelmsford	Maidstone Sustainable Access to Employment
Colchester Park and Ride	A20 Junction Improvements – DWDR
Medway City Estate Connectivity (Phase 1)	Southend Growth Hub (Phase 1)
Thames Gateway South Essex – LSTF (Southend)	Capital Skills Projects

Projects to complete by end of 2017/18

- Newhaven Flood Defence (LGF funding aspect)
- Colchester Integrated Transport Package
- A414 Pinch Point Package
- Ashford International Connectivity (Ashford Spurs)
- Medway Cycle Action Plan
- A127 Kent Elms Corner
- Southend Central Area Action Plan – Phase 1
- London Southend Airport Business Park – Phase 1



Capital Programme Management

LGF funding decisions by the Accountability Board on the 17th November 2017

- A133 Colchester to Clacton (£2.740m)
- M11 Junction 8 (£2.734m)
- A414 Chelmsford to Harlow (£2.173m)
- Mercury Rising Theatre (£1m)
- Sandwich Rail Infrastructure (£1.025m)

LGF funding decisions by the Accountability Board on the 15th December 2017

- STEM provision at the Colchester Institute Braintree Campus (£2.5m LGF)
- Health and Care provision at Colchester Institute Colchester Campus (£2.5m)



Capital Programme Management

LGF spend position

- ✓ £56.975m LGF spend in 2015/16 and £75.895 in 2016/17, including DfT retained schemes
- ✓ Further **£112.364m forecast in 2017/18** (£97.153m) excluding retained schemes)

2017/18 LGF spend forecast

SELEP Total	East Sussex	Essex	Kent	Medway	Southend	Thurrock	Retained schemes
£112.4m	£26.4m	£14.1m	£34.2m	£5.9m	£7.5m	£8.9m	£15.2m

Capital Programme Management

Forecast LGF spend position (£m)

	Planned Spend in 2017/18 (as restated in September 2017)	Total Forecast Spend in 2017/18 (as reported in October 2017)	Variance*	Variance* (%)
East Sussex	25.999	26.404	0.405	1.56%
Essex	17.867	14.099	-3.768	-21.09%
Kent	32.236	25.923	-6.313	-19.58%
Medway	12.299	5.910	-6.389	-51.95%
Southend	13.508	7.517	-5.991	-44.35%
Thurrock	12.293	8.905	-3.387	-27.55%
Skills	0.096	0.096	0.000	0.00%
M20 Junction 10a	8.300	8.300	0.000	0.00%
LGF Sub-Total	122.597	97.153	-25.443	-20.75%
Retained	31.126	15.211	-15.915	-51.13%
Total Spend Forecast	153.723	112.364	-41.358	-26.90%

Capital Programme Management

Forecast LGF spend forecast relative to LGF allocation available 2017/18 (£m)

	(£m)
LGF allocation in 2017/18	92.088
Carry forward from 2015/16 and 2016/17 to 2017/18	26.428
Total LGF available to spend in 2017/18	118.517
Total LGF revised planned spend in 2017/18	97.153
Variance*	21.363

*Difference between the total LGF available to spend in 2017/18 and the updated 2017/18 spend forecast.

Mitigation

Option	Mitigation
1	Bringing forward future year LGF spend on scheme in the 2017/18 programme
2	Bringing forward 2018/19 LGF scheme to spend in 2017/18
3	Transfer of LGF between partner authorities
4	Re-profiling of spend between LGF projects and local authority capital programme
5	Hold of LGF by SELEP between 2017/18 and 2018/19

Mitigation

Accelerated Spend

- Eastbourne and South Wealden Walking and Cycling LSTF package (£0.750m)
- Devonshire Park (£1.600m)
- A131 Chelmsford to Braintree (£0.750m)
- M11 Junction 8 Improvements (£0.500m)

New projects in LGF programme

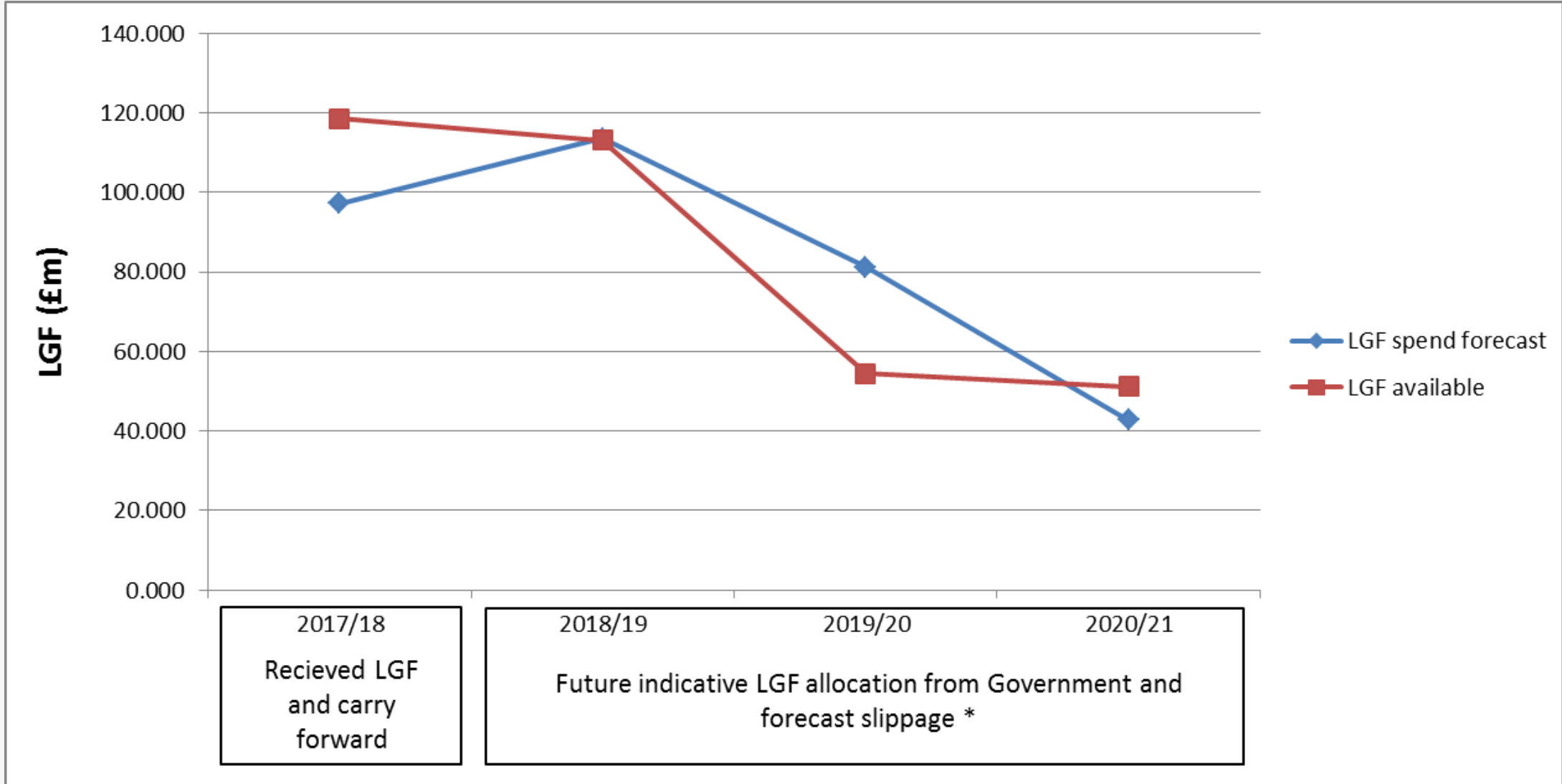
- Sandwich Rail Infrastructure – infrastructure to enable Kent to host the Open Championship (2020) and future events
- Mercury Rising Theatre – regeneration of theatre to enhance the cultural sector and tourism economy in Colchester, Essex





Capital Programme Management

Mitigation



Capital Programme Management

Chelmsford ITP – Mill Yard (Essex)

- Due to complete in March 2018
- Partnership working between SELEP, ECC, Chelmsford City Council, Greater Anglia and Network Rail
- Station redevelopment and accessibility improvements
- Supporting the delivery of **2000 homes** in the town centre



- **£3m LGF allocation** (£2m LGF spend to date)
- Developer and Network Rail contributions
- (£1.3m developer contributions and **£3.2m** National Station Improvement Programme).





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Capital Programme Management



- Project due to complete in May 2018
- Phase 1 of the project is near completion

North Bexhill Access Road (East Suusex)

- 2.4km single carriageway road link between the A269 and the Bexhill Hastings Link Road
- **£16.6 m LGF allocation** approved in November 2015
- To unlock planned employment growth in North Bexhill, including **780 new homes** and **38,000m² of commercial floorspace**.
- The construction of the first 20,000m² business space is due to commence on opening in spring 2018.



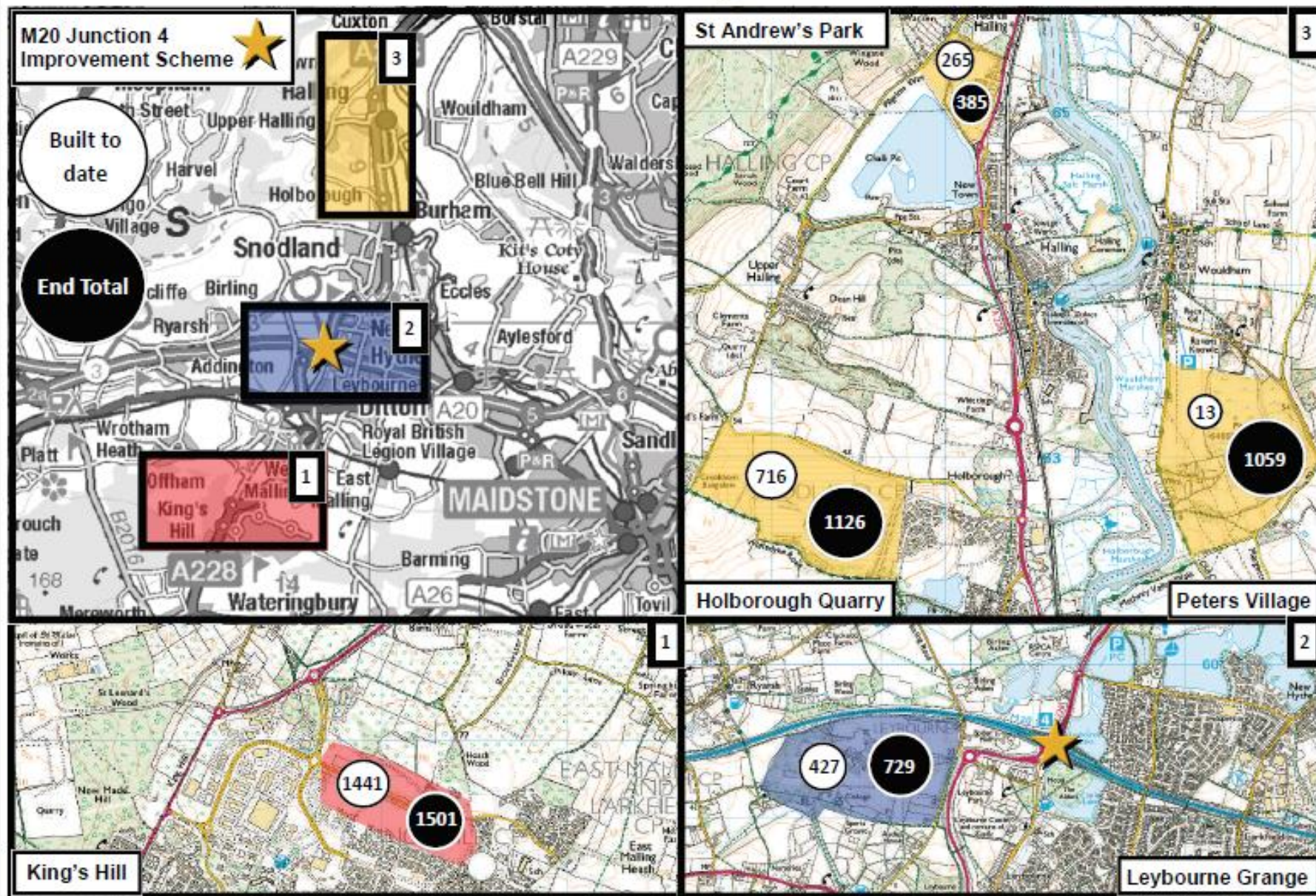


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M20 Junction 4 (Kent)

- Motorway bridge widening
- **Project completed** in February 2017
- **£2.2m LGF** allocation and £3.6m developer contributions
- Unlock 3,729 dwellings and 104,000 square metres of commercial development
- 31 small or medium enterprises SMEs sub-contracted during construction works of which 20 were local

M20 Junction 4 Housing Build Out Rates



Capital Programme Management

Tonbridge Town Centre Improvements (Kent)

- Public realm improvements, including widening and resurfacing of the pavements, street furniture, traffic calming and 20mph speed limit
- Phase 1 completed in June 2016 and second phase completed in April 2017
- £2.4m LGF



- **150 FTE jobs created to date** – through new retain business premises
- 142 new homes delivered in town centre area
- **Vacant premises reduced** from 30 in January 2016 to 16 in January 2017



Capital Programme Management

Chatham Town Centre Place-making (Medway)



- Station improvements
- Improved cycle and pedestrian connectivity
- Improving the link and public realm between Chatham Railway Station and Chatham Town Centre and Waterfront area and provision of a new civic space.
- Project due to complete in June 2018

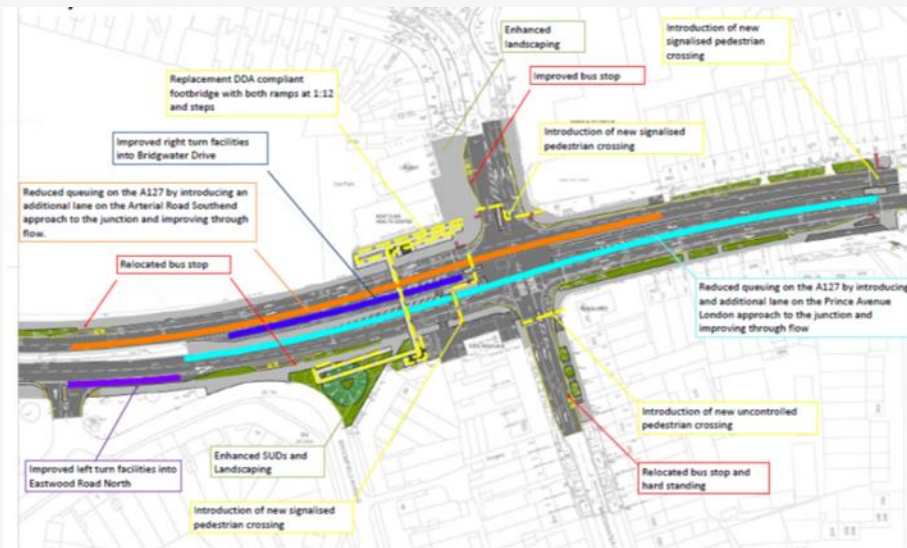
- £4m LGF investment (£1.98 LGF spend to date),
- Network Rail contributions - £0.900m
- 150 homes delivered to date



A127/A1015 Kent Elms Junction Improvement (Southend)

- Junction improvements to support London Southend Airport and the Southend and Rochford Joint Area Action Plan (JAAP)
- Project to release land and create 7,380 high value jobs

Capital Programme Management



- Element 1 (Eastbound carriageway works) **completed in June 2017** and phase 2 due to be completed in June 2018
- £4.3m LGF allocation and £0.941 Southend Borough Council contribution

London Southend Airport Business Park

- Project to create employment and deliver a pioneering innovation centre for start-up businesses together with grow-on space at the 20.88 hectare site



- **£23m LGF** allocation and **£8m Southend BC** contribution
- Project will deliver:
 - ✓ **85,148m²** – New Commercial Floorspace (sqm)
 - ✓ **164** – Gross Permanent Jobs (direct)
 - ✓ **3,551** – Gross Permanent Jobs (indirect)
 - ✓ **84m GVA** benefits



Capital Programme Management

	Jobs	Commercial Floorspace (m ²)	Houses	Other benefits
East Sussex	-	3000 - b1(c)	-	0.5km new road and 2km new cycle route built
Essex	3377	-	3331	28.88km road resurfaced and 3.41km new cycle route built
Kent	166	-	748	0.8km road resurfaced and 2.1km new cycle route
Medway	28	-	115	0.38km road resurfaced and 14.2km cycle route built
Southend	-	-	-	1.26km road resurfaced and 0.2km new cycle route
Thurrock	-	-	-	No project benefits reported to date

Growing Places Round 1 projects

- Priory Quarter, Hastings – Phase 3, (£7.000m GPF)
- North Queensway, (£1.500m GPF)
- Bexhill Business Mall, (£6.000m GPF)
- Sovereign Harbour, (£4.600m GPF)
- Parkside Office Village, (£3.250m GPF)
- Chelmsford North East Urban Expansion, (£1.000m GPF)
- Enterprise West Essex: Harlow Enterprise Zone, (£3.500m GPF)
- Workspace Kent, (£1.500m GPF)
- Live Margate, (£5.000m GPF)
- Discovery Park, (£1.400m GPF)
- Rochester Riverside, (£4.410m GPF)
- Chatham Waterfront, (£2.999m GPF)
- Grays Magistrates Court, (£1.400m GPF).



Growing Places Round 2 projects

- Colchester Northern Gateway (£2.000m GPF)
- Eastbourne Fisherman (£1.150m GPF)
- Fitted Rigging House (£0.800m GPF)
- Innovation Park Medway (£0.650m GPF)
- No Use Empty (£1.000m GPF)
- South Essex College Centre for Advance Automotive and Process Engineering (£2.000m GPF)
- Charleston Centenary (£0.120m GPF)
- Javelin Way Development (£1.597m GPF).



Capital Programme Management

Name of Project	Outputs defined in Business Case		Outputs delivered to date	
	Jobs	Houses	Jobs	Houses
Priory Quarter Phase 3	440	74	74	0
North Queensway	865	0	0	0
Rochester Riverside	402	450	0	0
Chatham Waterfront	211	115	0	0
Bexhill Business Mall	299	0	125	0
Parkside Office Village	169	0	120	0
Chelmsford Urban Expansion	2,105	0	365	0
Grays Magistrates Court	200	0	69	0
Sovereign Harbour	299	0	75	0
Workspace Kent	198	0	87	0
Harlow West Essex	4,000	1,200	0	0
Discovery Park	130	250	0	0
Live Margate	0	66		9
Totals	9,318	2,155	915	9