




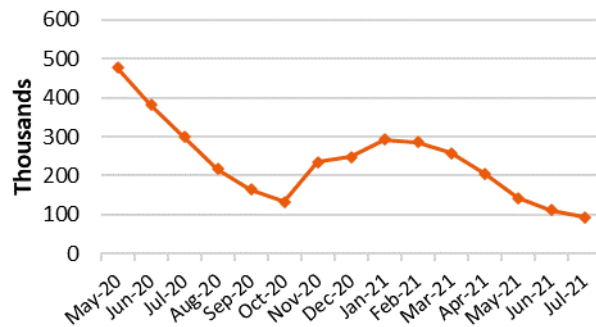





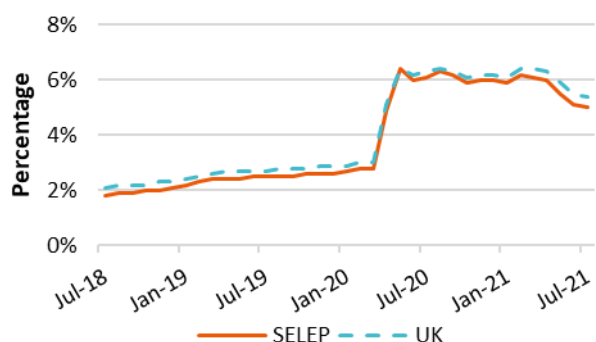

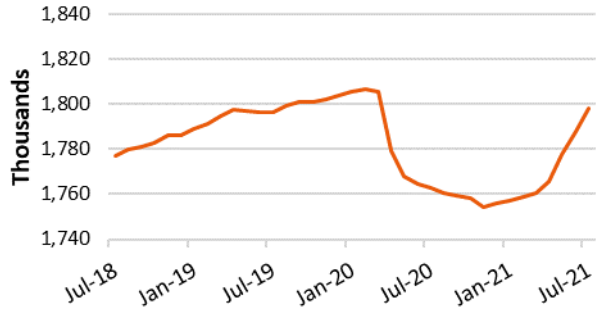

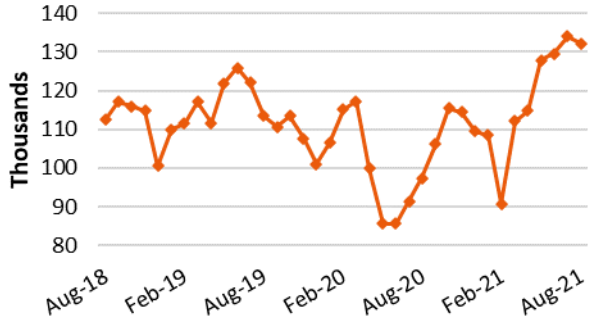
NATIONAL CONTEXT INDICATORS

QUARTERLY UK GDP		MONTHLY INDEX OF SERVICES		UK NET ENTERPRISE GROWTH		UK UNEMPLOYMENT	
£520.6 bn	 4.8%	97.9	 0.0%	29,965	 10,565	4.7%	 0.2%
Quarter to Jun-21	Improved on previous quarter	Month of Jul-21	No change from June	12 months to Jun-21	Worsened from Mar-21	Quarter to Jun-21	Improved from Mar-21
Source: ONS	-4.4% down compared to Dec-19	Source: ONS	-2.1% down compared to Feb-20	Source: ONS	-50% down compared to Jun-19	Source: ONS	0.9% worse compared to Dec-19

SELEP INDICATORS

INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
Jobs on Furlough Source: HMRC	94,600 July	 17,700 Improved from June	Percentage of eligible jobs SELEP 5.4% UK 5.3%		Use of furlough has shown continuous decline since February but even with the removal of restrictions, many jobs remain on furlough Furlough rates are highest in the Arts & Entertainment, Other services, Accommodation and Food, and Transport and Storage sectors, all above 9%



INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
Claimant Count Source: DWP	129,740 July	 1,175 Improved from June	Percentage of pop. aged 16-64 SELEP 5.0% UK 5.4%		<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 in recent months and was at 6.0% in July, down from 8.1% same time last year</p>
PAYE Payroll Jobs Source: HMRC	1,798,200 July	 10,591 Improved from June	Percentage of jobs Feb-20 SELEP -0.5% UK -0.7%		<p>Payroll jobs have been continuously increasing each month since November and are now close to pre-pandemic levels</p> <p>The Accommodation and Food sector has lost significant numbers of jobs while Public Admin. and the Health have gained jobs</p>
Unique Job Postings Source: EMSI	132,184 August	 1,798 Worsened from July	Percentage month change SELEP -1.3% UK -1.3%		<p>Although August saw a slight dip in job postings, this was far less than the usual seasonal movement, with numbers in recent months at record highs</p> <p>In the most recent quarter, the job roles which have seen the largest increase have been Chefs, catering staff, van drivers and sales occupations</p>



Business Resilience and Growth

KEY ACTIVITIES	OUTPUTS	OUTCOME MEASURES
<p>Launch and promotion of the COVID-19 Recovery Fund programme, including business support activities and training for skills. A data dashboard has been developed to monitor progress and KPIs</p> <p>Continued delivery of Growth Hub services across SELEP</p> <p>SSF Clean Growth South East (CGSE) programme supporting businesses to reduce emissions and contribute to net zero; and supply chain mapping of SMEs in the sector.</p> <p>Planet Mark Carbon Battle Bus flagship event at University of Kent in collaboration with KCC, promoting LoCASE and supporting businesses to decarbonise and pledge to net zero</p> <p>Successful webinar held by Digital Inclusion Group (DIG) focused on tackling the digital divide in the South East LEP; and establishment of a SELEP diversity working group</p> <p>Launch of new ESF projects, including the Workplace Training programme offering discounted qualifications including HGV driving; and Essex Retrain, Retain, Gain delivering functional skills, leadership and some sector specific qualifications</p> <p>Ongoing work to support and promote businesses, initiatives and investment in SELEP</p>	<p>Launch Webinar attracted 243 attendees. 330 EOIs to the Visitor Economy fund and 12 grants awarded to date</p> <p>335 enquiries and 207 unique businesses</p> <p>6282 SMEs identified in the supply chain CRM; 406 businesses engaged. 14 events.</p> <p>Carbon Battle Bus event on 3/09/21 with 40+ pledges made; DIG event held 15/7/21 with 33 attendees</p> <p>First SELEP Diversity Group meeting 15/09/21</p> <p>Projects launched summer 2021. 41,667 participants engaged across all ESF projects in SELEP up to Q4 2020</p> <p>Sponsored DigiTech Stream of Novo awards; MP Roundtable 23rd September</p>	<p>Total SELEP GVA in 2019 was £98.9 billion</p> <p>Enterprise 3 year survival rates (2019): SELEP – 56.4%, England – 51.5%</p> <p>Job density per 100 residents aged 16 to 64 (2019): SELEP 78, England 88 (with the main shortfall being in full time jobs)</p> <p>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%</p> <p>Apprenticeship starts (2020/21 to April): 17,730. Down 4.6% from 2019/20 and 21.3% from 2018/19</p> <p>Apprenticeship vacancies (at 7/9/21): 2,048 (1,499 exc. army). 0.83 per 1,000 jobs. Highest sectors: business, customer service, health and food & accommodation.</p>

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- Mapping of innovation support activity and networks to understand the existing SELEP landscape, follow up to BT innovation event and promotion of IUK competitions
- Executive Summary (with refresh) of Skills Advisory Panel Skills Report, aligning to Local Skills Improvement Plans (LSIPs)
- Virtual Careers events to take place 19th/21st October for young people and adults
- DSP data round table event with DCMS to take place in Autumn. Next DIG workshop in November to focus on digital inclusion in the workforce and essential digital skills
- A new digital strategy for the DSP is being developed to align with the Recovery and Renewal Strategy. Due to publish in November.
- SELEP conference on Net Zero to be held on 3rd November
- Review of the South East Business Hub suite of websites
- The XTEND Digital Campus and Centre for Digital Technologies both in South Essex, supporting digital and AI skills are launching October/November



UK's Global Gateway

KEY ACTIVITIES	OUTPUTS	OUTCOME MEASURES
Engagement on the Outline Business Case development for Freeport East and Thames Freeport	Thames Freeport OBC submitted; launch event on 15/09/21. Freeport East bid to be submitted mid-September	Port passengers (2020): 4.86 million compared to 11.97 million in 2019, a 59.4% drop. 70.5% share of UK passengers
Successful Airport Towns Summit held by Catalyst South on 15 th July 2021. Stansted Airport and Stansted College part of business panels.	71 people attended the Summit including, central and local Government and industry	Airport passengers (June 2021): 351,686 which was 12.4% of 2019 level and for UK it was 11.2% of 2019. A 145% increase on May
Working with the DiT ERDF Internationalisation project supporting businesses looking to trade abroad, ensuring promotion and referrals through the Growth Hub	3 grant awards made	Export value of goods (all countries): £10.07bn (2.9% share of England trade) of which £4.69bn was to EU countries
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	Production of videos, reports and market contacts complete	
Utilising GBF investment, work is underway to create a dedicated Logistics Training Facility at South Essex College's Thurrock campus in Grays Town centre. Construction has also started on the Maritime and Sustainable Technology Hub in Newhaven	Thurrock Logistics Centre to open in September	
Development of the Major Projects Group's report on future skills demand and economic impact of large-scale infrastructure investment, via MACE.	Draft report issued by MACE 10/08/21 for SELEP and Project review	
Medway City Estate works to deliver transport and modal shift improvements	Completed	

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- The Freeport OBCs will be assessed by MHCLG and an initial determination of the Seed Capital allocation made. Full Business Cases to be developed by 10/12/21.
- Ongoing work to promote the messaging of the Freeports with local communities and SMEs
- Support for the action planning and next steps following the Catalyst South airport towns summit
- Continue to collaborate with industry leads and Maritime UK in our support of the sector. Exploring opportunities for networking engagement events in early 2022 to provide sector specific information on key priorities such as innovation, decarbonisation and Freeports
- SEED project currently receiving EoIs from eligible companies with a closing date 31/10/21.
- DiT Internationalisation South East Project Advisory Group meeting 18/10/21



Communities for the Future

KEY ACTIVITIES	OUTPUTS	OUTCOME MEASURES
<p>Virtual Roundtable on Net Zero; Housebuilding & Construction. Discussions focused on the barriers and solutions to housing and construction in achieving net zero by 2050</p> <p>Developing Place Leaders Masterclass, delivered by the Institute for Place Management's (IPM) High Street Task Force. Funded by CLGU, with SELEP the first LEP to pilot the approach</p> <p>Meeting of Towns Fund lead officers to promote networking and collaboration on shared issues and opportunities</p> <p>Carbon Pathways (C-Path) SSF Project has created a cloud-based platform that allows stakeholders to design, facilitate, accelerate and monitor investment in the Low Carbon and Renewable Energy Economy</p> <p>Joint project with the Arts Council England (ACE) has commenced to explore how Cultural and Creative industries can be a driver for economic recovery and renewal in High Streets</p> <p>Promotion of the Newhaven Flood alleviation zone scheme which reduces the risk of flooding to approximately 430 homes and 390 businesses in and around the town</p> <p>Series of meetings with Chris Pincher, Minister of State for Housing. Direct industry insight into government around key issues incl. include First Homes, Development Finance for SMEs, Phosphates and Nitrates, Planning and Build Out, Affordable Housing and the current materials and labour shortages.</p> <p>Garden Communities roundtable – 'how to build back beautiful' held to discuss the impact of new government measures to put people and beauty at the heart of the planning process</p>	<p>15 identified industry experts attended first round table event on 12/08/21.</p> <p>46 participants attended on 22/06/21 and satisfaction score was 4.56/5.</p> <p>All 7 SELEP areas attended on 18/06/21, plus Crawley and CLGU lead</p> <p>C-Path online launch 28/9/21. Platform operational and used to support a bid from a SELEP LA for Sustainable Warmth Fund.</p> <p>Consultants appointed and framework agreed. 2 engagement events held.</p> <p>Video to showcase the scheme featuring SELEP and Environment Agency</p> <p>Homes England has planned further engagement and workshops</p> <p>Roundtable with experts from the public and private sector on 22/07/21</p>	<p>Housing growth (2021): 19,373 year to June 21. 3,700 up on 2020. 4% increase (England -1.5%).</p> <p>Commercial space (Mar 2020): 33.0 million square meters floorspace. 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</p> <p>Construction sector workforce: 112,000 jobs in SELEP (2019); Job density per 100 residents aged 16 to 64 – SELEP 9.9, England 3.6; 8.5% on furlough in June 2021 (UK 8.9%)</p> <p>Digital infrastructure (Sept2020), percentage of premises with access: Superfast broadband – SELEP 94.7; England 95.4 Gigabit – SELEP 12.4; England 24.8</p>

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- SECEN publication of a shortened Creative Prospectus which will set out the assets and high-level priorities of the sector in the South East
- Consultants are due to publish the ACE report, including case studies from towns across the SELEP area, by the end of October 2021
- Second Virtual Roundtable event on Levelling Up: Spotlight on Coastal– Health Inequalities & the Productivity Challenge to take place in Autumn 2021
- Finalise report and agree next steps with the IPM's High Street Task Force to support SELEP's role as a convenor of best practice / partnership engagement
- Support the development of business cases for the Towns Fund, to be submitted to Government at the end of October 2021 with funding released for the first wave of projects by March 2022
- Homes England and SME Development Finance Virtual Workshop 18th October 2021
- SELEP speaking at South East Construction Expo and featuring in South East Business Magazine (Oct/Nov edition)



Coastal Catalyst

KEY ACTIVITIES	OUTPUTS	OUTCOME MEASURES
<p>Development of enhanced evidence base for coastal work, including working with the SELEP Coastal Communities working group to support prioritisation in delivering the coastal prospectus.</p> <p>Rebuilding Confidence and Supply in the Visitor Economy SSF Project is underway, with the first stage of delivery providing insight into key consumer trends and sentiment analysis</p> <p>The Catalyst for Culture SSF project continues to deliver outputs through the development of a new partnership between established performing arts institutions of national and international standing in the SELEP region</p> <p>The Buy Local South East SSF project faced challenges due to the ongoing impacts of Covid-19 for businesses and consumers but has now completed</p> <p>The Gourmet Garden Trails SSF projects was impacted by ongoing restrictions in early 2021 but is getting back on track</p> <p>Launch of COVID-19 Recovery Fund project supporting the South East Visitor Economy (including a 100% Revi-VE grant for VE businesses and the development of place-based networks and re-boot campaigns)</p> <p>Supporting the award of Rural Community Energy Funding (RCEF) by the Greater South East Energy Hub</p> <p>Progress with GBF projects including Mercury Theatre Rising and Jasmin Vardimon Creative Hub.</p>	<p>Evidence base complete and presented to the coastal group 22/9/21.</p> <p>Delivery of destination confidence campaigns (e.g. Big Weekends); 4 virtual resilience workshops.</p> <p>92 artist/freelancer opportunities supported and multiple successful events promoted</p> <p>Completed in July</p> <p>Marketing campaign to take place in September/October</p> <p>12 Revi-VE grants awarded</p> <p>8 SELEP community energy projects supported through a total £1,060,000 RCEF</p> <p>Reopening of Mercury Theatre and topping out ceremony for Jasmin Vardimon in June</p>	<p>Claimant rate population aged 16 to 64 (June 2021): Coastal 6.4%, non-coastal 4.6%</p> <p>Gross Disposable Household Income (using net household incomes after housing costs) (2018): Coastal 27,000; Non-coastal 30,300</p> <p>Digital infrastructure (Sept2020), percentage of premises with access: Superfast broadband – coastal 96.7, non-coastal 93.8 Gigabit – coastal 13.8, non-coastal 11.8</p> <p>Net new businesses per 10,000 working age population (Mar 2019-Mar 2020): Coastal 7 (1.3% growth), non-coastal 14 (1.8% growth)</p>

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- SELEP Rural Working Group to hold a Roundtable to discuss the recommendations set out in the National Food Strategy and provide a view from the SELEP region to DEFRA on the critical recommendations to be actioned through from the report. Expected to take place in October 2021.
- Delivery and evaluation of SSF project on England's Creative Coast, bringing together cultural and tourism sectors, due to complete end of November
- SSF project: Accelerate Opportunities within the Newhaven Enterprise Zone is due for completion. Marketing activities delivered and the capital enhancement works at Avis Way commissioned
- Riding Sunbeams Solar Railways GPF project to be fully commissioned in October, connecting the world's first megawatt scale community renewable solar energy plant directly powering the direct current railways located in the heart of East Sussex
- Tendering Bikes and Cycle Infrastructure GBF project to complete in December, delivering a bespoke bike scheme and cycle network infrastructure within Jaywick Sands and Clacton aimed at tackling inequality within one of the most deprived areas of the country