









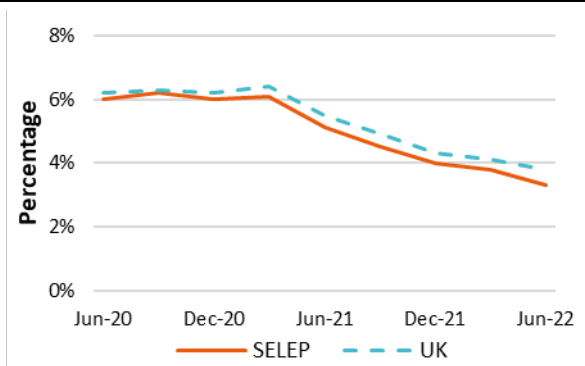
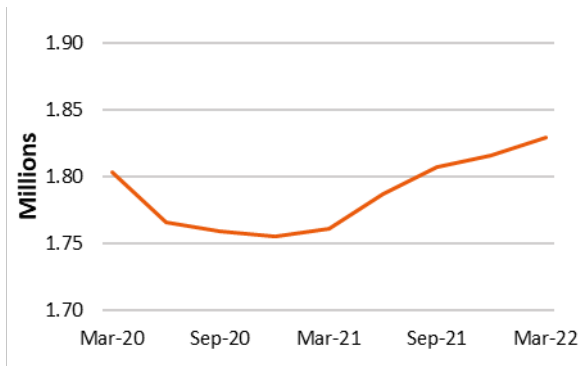
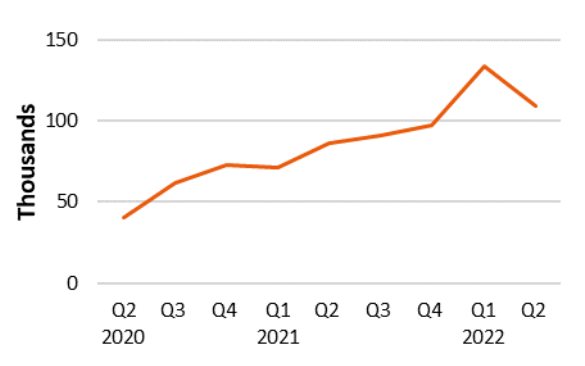
National (UK) Context Indicators

QUARTERLY GDP		MONTHLY INDEX OF SERVICES		NET ENTERPRISE GROWTH		UNEMPLOYMENT	
£560.1 bn	0.2% 	101.3	-0.6% 	-20,200	-19,380 	3.8%	0.1% 
Quarter to Jun-22	Improved on previous quarter	Month of Jun-22	Reduced from Mar-22	Quarter to Jun-22	Worse compared to previous quarter	Quarter to Jun-22	Higher than previous quarter
Source: ONS	-0.2% down compared to Dec-19	Source: ONS	1.1% up compared to Feb-20	Source: ONS	-22,500 down compared to 2019	Source: ONS	0.0% change compared to Dec-19

SELEP Indicators

INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
Net Business Growth	-1,195	-795 	Percentage of business stock SELEP -0.7% UK -0.7%	 <p>Thousands</p> <p>Q2 2020 Q3 Q4 Q1 2021 Q2 Q3 Q4 Q1 2022 Q2</p>	<p>Quarter 2 of 2022 saw continued net business closures, which was the fifth quarter in a row with net business closures</p> <p>Across SELEP local authority areas, only Tendring and Thanet had net business growth in quarter 2</p>
Source: ONS	Q2 2022	Worse compared to previous quarter			



INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
<p>Claimant Count</p> <p>Source: DWP</p>	<p>84,665</p> <p>June 22</p>	<p>-12,285</p> <p>↑</p> <p>Improved from December</p>	<p>Percentage of pop. aged 16-64</p> <p>SELEP 3.3%</p> <p>UK 3.8%</p>		<p>Claimant count has been reducing steadily since March 2021 but remains high compared to pre-pandemic levels</p> <p>The rate for people aged 16 to 24 has reduced most, and is now lower than for those aged 25-49</p>
<p>PAYE Payroll Jobs</p> <p>Source: HMRC</p>	<p>1,838,200</p> <p>Jun 22</p>	<p>7,700</p> <p>↑</p> <p>Improved from March</p>	<p>Compared to Mar-20</p> <p>SELEP +2.0%</p> <p>UK +2.1%</p>		<p>Payroll jobs continue to increase and have been above pre-pandemic levels since September 2021</p> <p>However there have been net job losses in Manufacturing, and Arts & Entertainment, with job growth in Health, Professional services, and Public Admin</p>
<p>New Job Postings</p> <p>Source: EMSI</p>	<p>109,100</p> <p>Q2 2022</p>	<p>-24,600</p> <p>↓</p> <p>Reduced on previous quarter</p>	<p>Compared to same quarter 2019</p> <p>SELEP +40.6%</p> <p>UK +55.9%</p>		<p>Quarter 2 saw a fall in advertised job vacancies, following a year of record vacancy rates</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
SELEP Annual Conference 'South East Futures: Our Evolving Economy' held, focusing on what the changing economic conditions mean for businesses and how we are encouraging growth and investment	Annual Conference and AGM held 7/10/22 with 96 attendees. Full details can be found on the SELEP website	Total SELEP GVA in 2019 = £98.9bn
Completion of the COVID-19 Recovery Fund programme, including business support activities and training for skills. A further report on programmes and planned evaluations will be provided to the Strategic Board in December.	Digital Skills Programme has completed. The Covid Recovery Academy and Digital Bridge have been extended (within original budget) enabling this support to continue. Digital and start-up business support programmes have exhausted their grant pots and have each produced an interim evaluation report.	Enterprise 3 year survival rates (2020): SELEP 58.2%, England 53%
Continued delivery of Growth Hub services across SELEP and evolution of the Growth Hub delivery model.	Work to realign activity to new budget and more sustainable model. 1,459 interactions across 831 businesses (Q2, 2022)	Job density per 100 residents aged 16 to 64 (2020): SELEP 76, England 85 (both down compared to 2019)
SAP/Skills activities including delivery against the Skills Strategy and Skills Report, aligning to Local Skills Improvement Plans (LSIPs) and overseeing future plans and priorities for the Digital Skills Partnership (DSP)	SAP met on 8/9/22 and confirmed it will continue to meet, potentially focusing on sector deep dives and skills data and intel, incl. to support the LSIPs. DfE funded data analyst advertised 26/9/22 to support this work.	Skills level (2021): Level 4+: SELEP 36.3%, UK 43.5% Level 2+: SELEP 76.8%, UK 78.1% No Quals: SELEP 6%, UK 6.7%
Implementation of the Strategy Network approach to strengthen two-way communication between SELEP and businesses and stakeholders	SELEP website updated with details about the network approach and the work of the 10 SELEP working groups. First network newsletter sent 5/10/22.	Apprenticeship starts (2021/22): Forecast 25,400, up 13% from 2020/21
GBF: Horizon 120 business and innovation park in Braintree	Official opening of The Plaza at the Horizon 120 business park held on 29/9/22, following completion of the new building in June 2022	Apprenticeship vacancies (at 05/10/22): 996 or 0.55 per 1,000 jobs. Significant fall compared to
Supporting the submission and, if successful, implementation of the DCMS Create Growth bid	SELEP part of a partnership led by KCC to submit a bid to the DCMS Create Growth Programme. This bid covers the entirety of SELEP and also West Sussex. DCMS will shortly be announcing the successful bidding areas.	

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER
<ul style="list-style-type: none"> • Evaluation of COVID-19 Recovery Fund programmes to be completed • Digital Skills Partnership to be rolled out to the Catalyst South geography, to be hosted by Solent LEP with continued SELEP (and Skills Advisory Panel) involvement • GBF project: First and Second Floors, Building 500, Discovery Park, Sandwich (Discovery Park Incubator) – to complete October 2022; development of Javelin Way, Ashford to complete Dec 22 • LGF: Innovation Park Medway (phase 2&3) to complete November 2022; Kent and Medway Edge Hub to complete December 2022 • 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 • Supporting local areas to progress Investment Zones, following EIOs submitted 14/10/22



UK's Global Gateway

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
Working with Freeport East and Thames Freeport following full business case submission	Continue to support both Freeports in developing businesses cases and plans. Supporting Thames Freeport in its skills planning and Freeport East on economic modelling, skills and innovation. Also, working with Freeport East on agreeing governance arrangements for a joint representative.	Dover ferry passengers (Q2 2022): 1.42 million compared to 2.97 in 2020, or 47.7% of pre-COVID level
Ongoing work through Major Projects Group on skills, supply chain engagement and low carbon/sustainability. Implementation of skills action plan to support Major Projects Group Skills sub-group.	A series of actions have been identified by the SWG to support the delivery of the MPG skills action plan. Key priority to help address technical tutor shortages in the sector. The Supply Chain Collaboration Platform, via HGP will be launched during October 2022.	Airport passengers (Q2 2022): 6.5 million which was 79.5% of 2019 level, with UK overall passenger numbers at 77.4% 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 at 31/09/22, a total of £2,139,370 in grants have been awarded across 302 applications.	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	50 Eols received with 30 businesses actively engaged to date across the UAE, Ireland, Vietnam and Canada. At least 100 SMEs exposed to new contacts/opportunities. The final outputs are in the process of being fully captured as the remaining virtual programmes of activity are delivered.	
GBF Project: North Kent College new Performing & Production Digital Arts Facility	Building in use and fully operational in September for new academic year. Launch event 11/10/22	
Working with the Maritime sector and Maritime UK (MUK), to promote regional activities and collaboration	Roundtable event hosted by Viking Maritime on 20/07/22 to discuss potential next steps for a South East MUK supported regional cluster. SE regional event 13/10/22 to promote interest in and collaboration for the next round of the DfT Clean Maritime Demonstration fund. Application submitted by Uni of Kent and Port of Dover to UKRI Investment Fund to build Short Straits Centre for Digital Borders and Planning in Dover.	

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER
<ul style="list-style-type: none"> • Next meeting of the MPG is being held 24/11/22, to continue discussions on decarbonisation and skills plan. • Continue engagement with Freeport East – working towards SELEP Board approval for a joint representative on the incorporated Freeport East Board. • 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, including a further meeting in November regarding cluster development and engagement in local bids. • Support local engagement with Lower Thames Crossing consultation



Communities for the Future

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
<p>Housing and Development Group (HDG) to assess the Levelling Up White Paper and other policies and their impact on the housing agenda in the South East.</p>	<p>The HDG met most recently in July and discussed the continued impact of high costs and labour shortages on the sector alongside the ongoing uncertainty in terms of the future planning framework. DHA Planning also hosted an affordable housing roundtable including many members of the group, which was an opportunity for developers and DLUHC to discuss the First Homes policy. Engaging with the group on the development of expressions of interest for investment zones.</p>	<p>Housing growth (EPC): 18,199 in 12 months to Jun-22, with 84.9% energy efficiency rating A or B.</p> <p>Commercial space (Mar-22): 32.4 million square meters floorspace. 5 years growth - 0.1% retail growth, 6.5% loss office space, 3.1% industrial growth, 6.1% growth other</p> <p>Construction sector workforce (2020): 124,000 employee jobs in SELEP</p> <p>Job density per 100 residents 16 to 64 – SELEP 4.8, England 3.5; 10.7% increase on 2019 (England reduction of 4.2%)</p> <p>Digital infrastructure (May-22), % of premises with access to Gigabit broadband – SELEP 60; England 69</p>
<p>Implementation of the South East Creative Economy Network (SECEN) Statement of Intent, which sets out a refreshed portfolio of sector-led pledges for initiatives that can be delivered in partnership (available to download on the SELEP website).</p>	<p>Discussions taking place on sector mitigation and disruption planning linked to cost of energy. And also, on the levelling up/growth agenda in the context of the new governmental priorities. Engagement on the Creative High Streets Report continues, and this work has been referenced in the recently published Kent High Street Toolkit.</p>	
<p>SSF Project: Accelerating climate-based solutions project. (LA case study areas agreed are Swale, Lewes, Thurrock, and Colchester)</p>	<p>4 local authorities and 8 businesses participated in the demand analysis. The supply analysis focussed on 4 case study local authority areas, engagement with environmental NGOs, community-based organisations and protected area authorities and government agencies, as well as engagement with 4 farm clusters. Most analysis is now complete with a synthesis report to be drafted by w/c. 17/10/22.</p>	
<p>GBF: Braintree Active Travel</p>	<p>Completion of the delivery of elements of the package of sustainable transport improvements for Braintree including cycle paths, footpaths junction and crossing improvements in September 2022</p>	

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- GBF Project: Tindal Square – completion expected in November 2022
- 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 – building on the recent roundtable discussion. Working with Homes England to address the impact of the shortages of planners and delays in the system. Continue to provide direct industry insight into government around key issues with monthly meetings with Homes England and DLUHC officials. Seeking to establish new series meetings with new Housing Minister, Lee Rowley MP.



Coastal Catalyst

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
<p>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</p>	<p>Visitor Economy programme continues to run place re-boot campaigns through Quarter 2 and Quarter 3 of 2022/23 to reinvigorate the visitor economy by increasing consumer confidence, footfall and spend. Outputs to be reported to Strategic Board in December.</p>	<p>Claimant rate population 16 to 64 (Jun-22): Coastal 4.3%, non-coastal 2.9%, both on reducing trend</p>
<p>Rural working group to prepare submission to the National Food Strategy</p>	<p>Working group members were engaged on the National Food Strategy and feedback from this was sent through to DEFRA colleagues in March 2022. The group is due to meet in November and will discuss the progress of this and the wider Rural agenda.</p>	<p>Gross Disposable Household Income (net household incomes after housing costs) (2018): coastal 27,000; non-coastal 30,300</p>
<p>Supporting partners to address key issues impacting our coastal communities, including investment to tackle delays approaching Folkestone and the Port of Dover, and to reduce the negative impact on local residents, businesses and communities.</p>	<p>Letter sent to Secretary of State for Transport, Grant Shapps MP from SELEP Chair on 1/9/22 to seek Government support in unlocking both public and private investment. Are now seeking reengagement post ministerial change.</p>	<p>Digital infrastructure (May-22), % of premises with access to Gigabit broadband – coastal 51.5, non-coastal 63.1</p>
<p>Collaboration activities to bring partners together to advance the growth and prosperity of the SELEP coast</p>	<p>Eastern Arc event on 22/9/22 'The Collaborative Coast' brought together academics, LAs, LEs and other stakeholders to build collaboration around renewable energy, green-blue economy, art, culture and tourism and health & wellbeing, incl. an address from Prof. Chris Whitty.</p>	<p>Net new businesses per 10,000 working age population (year to Mar-21): Coastal 15 (2.7% growth), non-coastal 8 (1.1% growth). First time in 5+ years that coastal areas saw higher business growth</p>

KEY ACTIVITY/DEADLINES FOR NEXT QUARTER

- Provision of regularly updated data and evidence to inform the work of the Coastal Communities Group.
- Review impacts of the Creative High Streets agenda, particularly in coastal communities, engaging with the Coastal Communities and SECEN groups- working groups have now been informed and engaged