









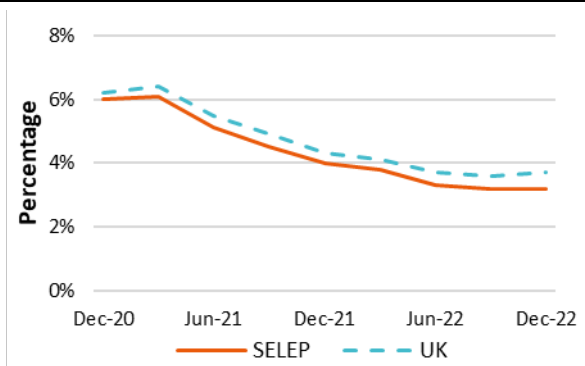
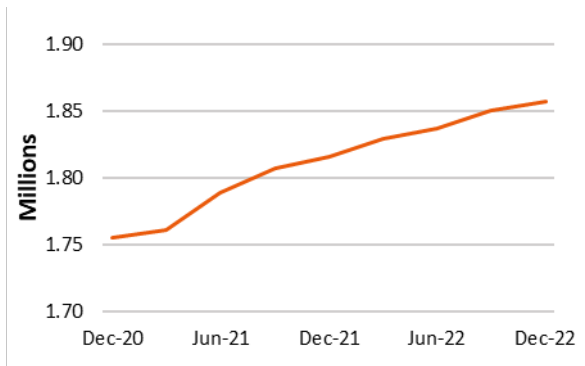
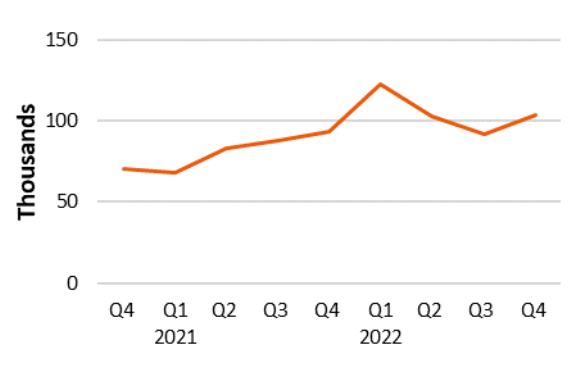
## National (UK) Context Indicators

QUARTERLY GDP		MONTHLY INDEX OF SERVICES		NET ENTERPRISE GROWTH		UNEMPLOYMENT	
<b>£559.2 bn</b>	<b>-0.2%</b> 	<b>99.2</b>	<b>-0.1%</b> 	<b>-25,090</b>	<b>-4,890</b> 	<b>3.7%</b>	<b>0.2%</b> 
Quarter to Sep-22	Reduced since previous quarter -0.4% down compared to Dec-19	Month of Nov-22	Reduced from Aug-22 -0.3% down compared to Feb-20	Quarter to Sep-22	Worse compared to previous quarter -33,255 down compared to 2019	Quarter to Nov-22	Higher than previous quarter 0.1% lower compared to Dec-19
Source: ONS		Source: ONS		Source: ONS		Source: ONS	

## SELEP Indicators

INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
<b>Net Business Growth</b>	<b>-1,465</b>  Q3 2022	<b>-270</b>  Worse compared to previous quarter	Percentage of business stock  <b>SELEP</b> -0.8%  <b>UK</b> -0.9%	 <p>Thousands</p> <p>Q3 2020 Q4 2020 Q1 2021 Q2 2021 Q3 2021 Q4 2021 Q1 2022 Q2 2022 Q3 2022</p>	<p>Quarter 3 of 2022 saw continued net business closures, which was the sixth quarter in a row with net business closures</p> <p>Since the trend for negative business growth started, the accumulated loss is now over 3% of the business stock both locally and nationally</p>
Source: ONS					



INDICATOR	LATEST	MOVEMENT	BENCHMARK	TREND	COMMENTARY
<p><b>Claimant Count</b></p> <p>Source: DWP</p>	<p><b>83,375</b></p> <p>Dec 22</p>	<p><b>1,170</b></p> <p>↓</p> <p>Higher (worse) since September</p>	<p>Percentage of pop. aged 16-64</p> <p><b>SELEP</b> 3.2%</p> <p><b>UK</b> 3.7%</p>		<p>Claimant count has increased slightly in the last quarter, following a reducing trend since March 2021</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><b>PAYE Payroll Jobs</b></p> <p>Source: HMRC</p>	<p><b>1,856,900</b></p> <p>Dec 22</p>	<p><b>7,100</b></p> <p>↑</p> <p>Higher (improved) since June</p>	<p>Compared to Mar-20</p> <p><b>SELEP</b> +3.0%</p> <p><b>UK</b> +3.1%</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, Arts &amp; Other Service, with job growth in Health, Professional services, and Public Admin</p>
<p><b>New Job Postings</b></p> <p>Source: EMSI</p>	<p><b>104,000</b></p> <p>Q4 2022</p>	<p><b>12,000</b></p> <p>↑</p> <p>Higher (improved) on previous quarter</p>	<p>Compared to same quarter 2019</p> <p><b>SELEP</b> +44%</p> <p><b>UK</b> +67%</p>		<p>Quarter 4 saw advertised job vacancies increase again, remaining at historically high levels</p> <p>Advertised job vacancies have been particularly high in the last quarter for caring and personal service occupations</p>



**Business Resilience and Growth**

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
Completion of the COVID-19 Recovery Fund programme, including business support activities and training for skills.	A report will be provided to Board in July to include evaluation status and information on the CV-19 projects.	Total SELEP GVA in 2020 = £96.2bn
Continued delivery of Growth Hub services across SELEP and evolution of the Growth Hub delivery model.	Continued discussions to evolve the Growth Hub business model to respond to 22/23 cuts in funding and scenario plan for 23/24. 1,105 interactions across 614 businesses to date (Q4, 2022).	Enterprise 3 year survival rates (2021): SELEP 61.5%, England 57.5%
Skills Advisory Panel (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 17/01/23. Data and LSIP presentations given. Contextual and skills data for LSIPs provided. DSP Catalyst South has been rolled out, led by Solent LEP, with a new Coordinator in post. Opening of the new Construction Centre (and IoT launch) at Chelmsford college on 3/2/23, attended by SELEP CEO.	Job density per 100 residents aged 16 to 64 (2021): SELEP 77, England 87  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	Purchase of E-Shot confirmed to manage the network communications. Network newsletters circulated December and February. University group (U9) met on 23/11/22 to agree a focus on driving innovation funding into region, a sectoral focus for collective activity and business support offering.	Apprenticeship starts (2021/22): 24,590, up 9.4% from 2020/21
GPF Project: Learning and Skills Employment Hub, supporting adults to retrain, upskill and access employment opportunities	Opening of Medway Learning and Skills Hub attended by SELEP CEO on 18/01/23	Apprenticeship vacancies (at 16/01/23): 1,012 or 0.61 per 1,000 jobs
Promoting economic growth and role of partnership across the LEP	SELEP CEO presented at the Kent & Medway Business Summit on 13/01/23 on the impact of the changing economic conditions in the South East.	

**KEY ACTIVITY/DEADLINES FOR NEXT QUARTER**

- CV-19 programme: Evaluation reports for business support projects to be produced, reporting by Quarter 1 of 2023/24
- Catalyst South DSP event to take place in Portsmouth on 20/4/23, including a roundtable discussion with Paul Scully, MP.
- LGF project: Innovation Park Medway (phases 2 & 3) due to complete February 2023.
- 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
- Next meeting of the U9 group will take place in early March to discuss how to progress the three key priorities of the group.



**UK's Global Gateway**

<b>KEY ACTIVITIES</b>	<b>OUTPUTS/OUTCOMES</b>
Working with Freeport East and Thames Freeport	Freeport East received final Government approval on 10/01/23, with SELEP attending Parliamentary Reception hosted by Sir Bernard Jenkin. Local receptions planned for coming months.  SELEP continues to support both Freeports in developing their plans, inc. Thames Freeport on skills and Freeport East on skills and innovation.
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.	MPG continues to deliver against its skills action plan. Key priority to help address technical tutor shortages in the sector. Funding for solutions research approved. Reply received from letter sent to Skills Minister, Robert Halfon MP to update him on our work. Soft launch of the Supply Chain Collaboration Platform, via HGP, in February.
Working with the DIT ERDF Internationalisation project supporting businesses looking to trade abroad, ensuring promotion and referrals through the Growth Hub	The project closed for applications on 5/1/23 and the financial closure date is 31/3/23, with updated numbers to be reported following financial closure.
Continue to work with DIT to address barriers and maximise opportunities for exports	LEP Network are meeting with DIT in February on international trade, with a view to setting up a regular cycle of meetings with DIT.
Engagement with sub-national transport bodies on the development and deployment of their strategies	Lead officers from TfSE and TfE to provide an update to Strategic Board on 10/2/23 on their regional strategies and priorities. TE's Regional Strategy will be submitted to DfT early in 2023. The TfSE Board in planning to adopt their Strategic Investment Plan in March.

<b>OUTCOME MEASURES</b>
Dover ferry passengers (Q4 2022): 1.51 million compared to 2.05 in 2019, or 74% of pre-COVID level
Airport passengers (Q3 2022): 7.5 million which was 84% of 2019 level, with UK overall passenger numbers at 81% of 2019 level
Export value of goods (all countries, 2021): £9.6bn (3.1% share of England trade) of which £4.9bn was to EU countries, with overall 15% increase compared to 2020

<b>KEY ACTIVITY/DEADLINES FOR NEXT QUARTER</b>
<ul style="list-style-type: none"> <li>Continue to work with Thames Freeport to develop its skills plan.</li> <li>Commence solutions based study into tutor shortage issues and collective solutions for piloting.</li> <li>Next MPG meeting 01/03/23.</li> <li>Continue to collaborate with industry leads and Maritime UK in our support of the sector, including their Skills for Green Jobs workstream which is seeking industry and education participation.</li> <li>Continue to support HGP on engagement with the MPG supply chain collaboration platform.</li> </ul>



**Communities for the Future**

KEY ACTIVITIES	OUTPUTS/OUTCOMES	OUTCOME MEASURES
Housing and Development Group (HDG) to respond to the Levelling Up White Paper and other policies and their impact on the housing agenda in the South East.	SELEP has been invited by the Housing Minister to participate in a roundtable event on 24/01/23 to discuss the nature and causes of planning application backlogs, and the views of HDG at its last meeting on 7/2/23 has been sought to inform this engagement.	Housing growth (EPC): 18,450 in 12 months to Sep-22, with 85% energy efficiency rating A or B.
Supporting the implementation of the DCMS Create Growth Programme, led by KCC and South East Creative Economy Network (SECEN)	SELEP wide (and West Sussex) partnership continues to plan for implementation of the £1.275m Create Growth Programme, via a partner steering group. Recruitment and additional procurement underway for February start. Businesses will also enable access to investor networks and businesses can bid into a £7m pot to scale rapidly.	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
Implementation of the 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 <a href="#">SELEP website</a> ).	SECEN met on 18/01/23 and discussed this years' plan with a focus on how to best engage with the public health & culture agenda, and engagement with Arts Council England Initiatives.	Construction sector workforce (2021): 123,000 employee jobs in SELEP, 7.4% of jobs compared to 4.8% for England
SSF Project: Accelerating climate-based solutions project. (LA case study areas agreed are Swale, Lewes, Thurrock, and Colchester)	The project is now complete. A final report is published as part of the February Strategic Board pack, detailing the project outputs and key findings.	Digital infrastructure (Sep-22), % of premises with access to Gigabit broadband – SELEP 62.5; England 71
Promoting economic growth and role of partnership across the LEP	SELEP CEO and Chair presented at the Creative Estuary Symposium on 17/01/23 to showcase how the sector might benefit from major investments in SELEP area. SELEP CEO attended I-Construct event on 25/01/23.	
LGF Project: Beaulieu Park station contract awarded to J Murphy & Sons Ltd	SELEP involved in press release for Beaulieu Park, which includes quote from SELEP Chair. Turf-cutting event to take place in February with SELEP in attendance.	

**KEY ACTIVITY/DEADLINES FOR NEXT QUARTER**

- The Housing and Development Group continues to raise issues due to adverse market conditions, particularly labour market issues and increased materials cost which has now been exacerbated by general inflationary pressures. Brian Horton will provide feedback on the DLUHC roundtable discussion on planning system blockages, led by the Housing Minister Lucy Frazer MP, at the next meeting of the working group
- Implementing the Create Growth Programme, focused on promotion and onboarding businesses into the project



**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. A full report is available in the December Strategic Board pack.</p>	<p>Place campaigns for each of the federated areas of SELEP will run to the end of 2022/23. A report will be provided to Strategic Board in July to include evaluation status and information on all CV-19 projects.</p>	<p>Claimant rate population 16 to 64 (Dec-22): Coastal 4.2%, non-coastal 2.9%</p>
<p>Rural working group to meet to discuss issues pertinent to the rural economy.</p>	<p>The group last met 8/11/22, with discussions focused on energy costs. A letter was sent to BEIS on behalf of the working group, which has been responded to by Government including reference to the follow-up energy support scheme that has now been announced. SELEP is engaged with the new LEP Network Rural LEPs Group, brought together to discuss national collaboration on rural issues. Meeting 15/2/2023.</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 and areas most in need of levelling up, 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>The SELEP area secured over £200M from the <u>LUF Round 2</u>. Dover was most successful with £45M to KCC to improve the flow of traffic from the UK to the EU and £18M to DDC for Dover Beacon. Tendring secured c.£20M for Clacton Civic Quarter; Swale c.£20M for Sheerness Revival and Rother c.£19M for Bexhill culture, community and skills. Canterbury, Folkestone &amp; Hythe, Colchester and Harlow also secured just under £20M each.</p>	<p>Digital infrastructure (Sep-22), % of premises with access to Gigabit broadband – coastal 55.8, non-coastal 65.5</p>
<p>Collaboration activities to bring partners together to advance the growth and prosperity of the SELEP coast</p>	<p>The Coastal Communities Group have agreed to prioritise the visitor economy/ tourism offer for the South East coast in early 2023 and working group members have made introductions to leading national voices on the coastal visitor economy agenda who are due to speak at the next meeting.</p>	<p>Net new businesses per 10,000 working age population (year to Mar-22): Coastal 3.4 (0.6% growth), non-coastal 0.5 (0.1% growth). Second year in a row 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.
- Explore how the Coastal Communities Working Group could collaborate with key partners to advance the inward investment agenda
- Coastal Communities group inviting national partners in to discuss how the South East Coast can be at the forefront of coastal visitor economy development. Next meeting date for be confirmed for late February-early March.