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To: Environment and Transport Cabinet Committee – 17 March 2022
Growth, Economic Development and Communities Cabinet Committee – 22 March 2022

Subject: Green Economy - Prospects and Opportunities

Classification: Unrestricted

Past Pathway of report: N/A

Future Pathway of report: N/A

Electoral Division: All

Summary: This report provides an overview of the work and progress to date to support a more sustainable and lower carbon economy within the county. It outlines KCC’s approach and updates on several partnership initiatives working directly with businesses to move towards a greener economy within the county.

Recommendation(s):

The Cabinet Committee is asked to note current and planned activity to support the development of the green economy in Kent.

1. Introduction

1.1 Changes in our climate are already affecting Kent and Medway and a resilient future depends on us acting now in response to the main climate risks that Kent and Medway face, in particular higher temperatures, increased flooding and coastal change, more frequent storms and heavy rainfall, drought, and soil erosion (Kent and Medway Climate Change Risk and Impact Assessment 2019). It is crucial that the impacts of climate change are planned for and considered alongside other drivers of social, environmental, and economic change to reduce the vulnerability of our communities, natural environment, and economy to climate change risks. Rising temperature and consequential changes in the sea level and weather patterns are an “externality” of economic activity, and the public sector has a major role to play in coordinating a response that deals with these changes in Kent.

1.2 The United Nations Environment Programme definition of a green economy is an economy that is ‘low carbon, resource efficient and socially inclusive.’

In a green economy, growth in employment and income are driven by public and private investment into such economic activities, infrastructure and assets

that allow reduced carbon emissions and pollution, enhanced energy, and resource efficiency, and prevention of the loss of biodiversity and ecosystem services.

- 1.3 In recent years, Kent's carbon dioxide emissions have fallen progressively: between 2005 and 2019, per capita CO₂ emissions fell by around 50%¹. However, the UK's commitment to achieve 'net zero' emissions (over a 1990 baseline) by 2050 will require further, far-reaching changes in industrial processes, transport networks, heating systems and construction. Decarbonisation is therefore a structural change that will impact all aspects of Kent's economy, presenting opportunities for the development of new technologies and services and challenges for firms that need to adapt.
- 1.4 The UK Government define clean growth as 'growing our national economy whilst cutting greenhouse emissions,' whilst ensuring 'an affordable energy supply for business and consumers'. The clean growth sector, therefore, by definition, is a sub-sector of the green economy solely focusing on decarbonisation and energy or resource efficiency.

2. Defining the 'clean growth' opportunity, and measuring its size in Kent

- 2.1. Although decarbonisation will affect all sectors of the economy, efforts have been made to identify those areas of activity that are likely to be at the forefront of change, such as those engaged in environmental protection, energy production, renewables, and so on.
- 2.2. This has led to two related definitions of the 'low carbon' or 'clean growth' opportunity. In 2015, a government report defined a 'Low Carbon and Renewable Energy Economy' (LCREE), which is the main source of official data on the size of the 'sector'. The Office for National Statistics also reports on the scale of the Environmental Goods and Services Sector (EGSS).
- 2.3. Drawing on these two sector definitions, the Clean Growth Southeast report, funded by the Southeast Local Enterprise Partnership, was published in December 2021². This maps low carbon businesses across the South East Local Enterprise Partnership, identifies barriers to and opportunities for growth, quantifies the carbon footprint across the region and proposes a pilot Clean Growth Programme to support a green economic recovery and contribute to the Government's Net Zero Growth strategy.
- 2.4. The Clean Growth South East report highlights the potential of low carbon growth in Kent. For example:
 - There are **58 renewable energy projects in Kent** (existing and under construction). These total over 700MW of green energy production per year. 20 schemes currently in the planning pipeline will add a further 1000MW of green energy production per year.
 - Nearly **5,200 Kent and Medway businesses** were highlighted in this report as being part of the clean growth 'sector' in 2021, an increase of 957 from 2015

¹ BEIS, [UK Local authority and regional carbon dioxide emissions statistics](#)

²See Annex 1 for further details of the sector definition.

- This activity equates to over **37,000 employees and £3.18bn** in GVA. For comparison, this is roughly equivalent to Kent and Medway's manufacturing sector in employment and output terms and represents **7% of the total Kent and Medway GVA originating from the clean growth sector**³, and approximately **4% of all employees**⁴ in Kent and Medway working in the clean growth sector.

2.5. Beyond these headline numbers, it is the supporting of the 'supply' of the goods and services that we need on our Net Zero journey that will help us meet the ever-rising 'demand'. Simply put, the more capable our local green economy is of delivering our own decarbonising ambitions, the stronger and more resilient our wider performance will be economically but also from an employment, environmental and social perspective.

3. Current Work Activity

Supporting business decarbonisation and business growth

3.1. The County has been leading the way in spearheading promotion of and engagement with the Low Carbon and Clean Growth agenda for many years under the Low Carbon Kent banner. This aims to support SME *demand* for investment in decarbonisation (increasing business sustainability and reducing risk), as well as the *supply* of new goods and services. The European Regional Development Funded Low Carbon Across the South East (LoCASE) programme has been running since 2016 and has delivered support for over 1,400 small and medium enterprises across the South East Local Enterprise Partnership region, including over £7.5m in grant funding.

3.2. **Waste and the circular economy** figure prominently in opportunities for focus and employment in the Clean Growth South East report. Already we are focussing on these themes through the Interreg Funded Upcycle Your Waste and BLUEPRINT projects. The former looks to find novel and viable business solutions to challenge the status quo of linear waste streams, having already carried out waste surveys on 127 SMEs and spoken to 70 others on barriers and opportunities. The aim is to work up pilots across the county to re-use, repurpose, re-manufacture and reveal a whole new set of business models. BLUEPRINT's focus on increasing recycling rates and behaviour change means its concept was originally about social change, but it delivers economic change through exploring, for example, how to develop enduring closed loop paper cup recycling and social enterprise training of disadvantaged individuals to secure jobs in the circular economy. This aligns with ambitions for refreshed local waste and minerals plans as part of circularity in wider infrastructure and growth strategies. The outcomes of the Upcycle Your Waste pilots are due to be reported in Spring 2022 and will be used to inform the focus of activity for the remaining project delivery until July 2023 when the schemes end.

³ https://www.kent.gov.uk/_data/assets/pdf_file/0012/8202/Gross-Value-Added-bulletin.pdf

This 2021 bulletin reports the GVA statistics from 2019. The total GVA for Kent and Medway in 2019 was £45.211 bn.

⁴ Nomisweb reports the employee numbers from Jul 20 to Jun 21 for both Kent and Medway.

<https://www.nomisweb.co.uk/reports/lmp/la/1941962885/report.aspx?town=kent#tabempunemp>

And <https://www.nomisweb.co.uk/reports/lmp/la/1946157282/report.aspx>

- 3.3. We have also added the theme of circularity in waste to our Steps to Environmental Management (STEM) accreditation and ensure that all businesses engaged (both Kent and beyond, and across any sector, not just those within Low Carbon and Renewable Energy) take the chance to think about their wider impacts, not just to remain compliant with STEM but also to adapt and move towards continuous environmental improvement. It is this cross-cutting theme that will lend itself to the added focus coming out of COP26 as 'net zero' pledges at all levels of our economy seek support to benchmark footprints, design action plans and deliver projects to realise this 'clean growth' potential. As such, work has been undertaken by the KCC Sustainable Business and Communities team and others in the Kent and Medway Climate Change Network (a public sector, officer level group, providing support around the delivery of the Kent Environment Strategy, with a focus on organisational resource efficiency, environmental sustainability and climate change resilience) to link Social Value Key Performance Indicators with KCC and borough/district procurement teams in setting minimum environmental standard for contractors. Support will be offered to engage and involve them to measure and improve their performance, thereby also reducing supply chain emissions as a result.
- 3.4. KCC Business and Enterprise team is leading on the Interreg Funded C-Care project as part of the wider covid-response package This includes a key 'green economic recovery' theme to ensure that we showcase building back better in all sectors. In doing so the scheme enables local suppliers of 'green' goods and services to join a £150K framework for a fully funded (Interreg Channel-programme-derived) voucher scheme for 100 Small and Medium Enterprises (SMEs). The green recovery vouchers will enable the SME to purchase goods and services from a framework comprising almost exclusively of local suppliers for energy efficiency measures, waste reduction interventions, sustainable transport solutions, biodiversity solutions and 'Net Zero' transition planning & feasibility studies. As such, this will be an excellent opportunity for KCC's supply chain to take some small but important steps in the right direction for our small and medium sized enterprise community.
- 3.5. The Kent and Medway Growth Hub is increasingly active in aligning general business support and growth with the green economy, assisting the Greater South East Energy Hub's drive to recruit Kent-based installers to domestic retrofit schemes.
- 3.6. On the withdrawal from the European Union, the Government pledged to establish a new fund, called the UK Shared Prosperity Fund, which will replace European Union structural funds. First details on this Fund were published in January 2022 as part of the Government's Levelling Up paper. The Fund will be allocated against investment plans that District and Borough authorities will draw up, there is no automatic role for the County Council. There is however scope for Districts to include green economy initiatives within their investment plans as these are drafted, as two of the three specified themes for these investment plans are 'local businesses' and 'people and skills'. Investment plans are to be drawn up by summer 2022. Current European Union funding is confirmed until April 2023 and therefore, if the roll out of the Shared Prosperity Fund is delayed, the team and resource currently dedicated to the majority of

the work highlighted in this paper will be impacted if KCC is unable to invest more in terms of base funding for staff.

- 3.7 In March 2021, the Government launched the UK Community Renewal Fund, a one-year pilot scheme to allow communities and businesses to trial new approaches and innovative ideas at the local level, ahead of the launch of the above UK Shared Prosperity Fund. In the UK Community Renewal Fund prospectus, local businesses and organisations were encouraged to submit project bids that *‘Support decarbonisation measures – for example encouraging local businesses and organisations to reduce greenhouse gases through investment in new technology or energy efficiency measures that can have bottom line benefits and improve business productivity’*. KCC officers promoted the opportunity to bid across business, university, college, and voluntary and community sector networks.
- 3.8 In November 2021, the Government announced that the following two Kent-based projects, focussing on clean growth, had been awarded UK Community Renewal Funding:
- The Net Zero Pathway for Change project, led by the Kent Invicta Chamber of Commerce, which will provide businesses in Kent with further access to carbon reduction advisers, workshops, University collaboration through innovation grants, and funding to support the implementation of carbon reduction activities.
 - The Growing Green project, which is aligned to the work of the Growing Kent & Medway consortium and led by NIAB EMR. ‘Growing Green’ will enable micro- and small and medium enterprises in the horticultural and food and drink sectors, which don’t normally access innovation support, to embark on an innovation journey for the net-zero economy. It is an integrated and incentivised business support programme that is developed and tested through co-innovation between businesses, Research and Development specialists and business support providers.
- 3.9 Across all of the above, **KCC’s business engagement strategy revolves around a joined-up service provision**. When KCC business-facing teams are speaking to a firm about a particular project that might be most pertinent to them, we also introduce other sustainability aspects which might not be on their agenda and always try to cross-refer across teams and directorates where relevant. This extends to programmes delivered by our partners: for example, through the Kent and Medway Growth Hub. As every business moves towards a low carbon business over the medium term, this joined-up approach will become increasingly important.

Developing skills for a low carbon future

- 3.10 Skills provision and shifting requirements to meet the ambitions of the region have been explored by South East Local Enterprise Partnership Skills Board and the Kent and Medway Employment Task Force. Skills for decarbonisation were highlighted by gaps exposed nationwide by the collapse of the Government’s Green Homes Grant; the Kent and Medway Workforce Skills

Evidence Base also demonstrates the cross-sectoral nature of low-carbon skills and identifies them as a high priority.

- 3.11 Recent progress includes Mid Kent College's new training centre which is set to fill a role in training and re-training a workforce for installation of renewables such as heat pumps as well as focus on modular construction and retrofitting. This is funded by the Department for Education's Strategic Development Fund, which a consortium of Kent colleges was awarded in 2021. In parallel, the emerging Local Skills Improvement Plan, being led by Kent Invicta Chamber of Commerce, will develop new solutions to 'short course' provision to meet employer need.
- 3.12 A follow on Low Carbon Homes conference previously funded by Triple A (our successful Horizon 2020 project) will look to further develop the sector locally and regionally later in 2022 through LoCASE support.

Decarbonising transport

- 3.13 Our current approach, bringing together KCC teams such as Transport Innovations, Waste, Planning and Business & Enterprise to implement the Kent Environment and Energy & Low Emissions Strategies showcases how KCC's approach is broad, realising that local businesses and communities are intrinsically linked in realising Net Zero ambitions and driving change. For example, KCC's commitment to cover two years of delivery revenue costs in order to secure Highways England funding for a fleet of 48 electric vans (through the KCC Transformation Fund) has meant that the Kent REVS (Realising Electric Vans Scheme) has been able to successfully launch, enabling over 175 interested businesses and charities around Kent to sample for free a range of models for up to two months. This has also meant working with our Local Authority partners in developing charging infrastructure and is set to be further enhanced by the EV600 initiative to install charging hubs across the county. Public private partnerships such as this can have wider benefits when looking at options for developing infrastructure. Whilst this activity is making inroads to decarbonising the KCC fleet of vehicles and of enabling some community level activity KCC's role is much wider than this and requires the organisation, through its commitments in the Kent Environment Strategy and the Energy and Low Emissions Strategy, to consider and enable transport innovation to contribute county wide to the decarbonisation of the transport sector.

Active travel schemes (including those offering bike, e-bike, or e-scooter rental/repair for example) mobility as a service and other initiatives are also becoming increasingly popular as part of local planning.

Developing renewable energy

- 3.14 This in turn ties in with the Interreg funded Inn2POWER project and offshore wind supply chain work KCC is looking to build on by looking at Green Hydrogen infrastructure and opportunities through part-funded specialist support, backed by the expertise and learning of European partners. With three hydrogen production sites at various stages of development in Kent and

Medway, upwards of 30MW of additional currently unreported supply could finally break the 'chicken and egg' situation and enable promotion and support of demand as well as infrastructure supply. Having both a supply of hydrogen to be used for fuel and the associated infrastructure to make use of the fuel could be an important part of the county's armoury in contributing to tackling road transport emissions as a chief source of emissions and carbon footprint in the region, as well as decarbonisation of the natural gas grid through blending. Hydrogen can be used to replace natural gas in grid infrastructure either wholly or by adding as a blend to natural gas supplies and is highly efficient with 1kg hydrogen gas generating the same energy as 2.8kg of natural gas. The Energy Network Association suggest that blending 20% hydrogen into the existing UK gas grid will reduce carbon emissions by the equivalent of 2.5 million cars a year, without any changes needing to be made to people's cookers, boilers, or heating systems. With the increasing use of hydrogen and technical advances, the costs of production, distribution and product manufacturing will become increasingly affordable for businesses across Kent enabling businesses to benefit from both reduced emissions and costs through increased efficiency. The Thames Estuary is particularly ambitious on hydrogen's role as an economic driver locally, with opportunities and future plans outlined in The Thames Estuary Growth Board's Hydrogen Route Map published in October 2021.

Investing in natural capital

- 3.15 The role of natural capital and carbon sequestration will be of paramount importance to Kent reaching its Net Zero ambitions. The green economy includes some crucial players and sub-sectors (such as landscape designers, grounds maintenance and arboriculture firms) which need to be included in this theme. As such, initiatives and pledges like Plan Tree, Plan Bee and the wider adoption of increased biodiversity awareness and investment in local and regional strategies are developing. On this issue, there is a South East Local Enterprise Partnership wide 'nature-based solutions' study underway (led by East Sussex CC but including KCC as a stakeholder) and Kent Wildlife Trust is also seeking to explore the role that our business community can do to help realise the wider 'local offsetting' ambitions through their supply chains.

Supporting future investment

- 3.16 The Low Carbon Kent partnership through South East Local Enterprise Partnership helps businesses who are looking to deliver low carbon services and innovation by accessing European Regional Development Fund (ERDF) grant funding and innovation support. We've recently secured Government agreement to not only continue this in the South East but also form a partnership with Local Authorities in three other Local Enterprise Partnership areas – EM3, Coast2Capital and Solent – to realise the same shared ambitions across the South and East.
- 3.17 The launch of the last European Regional development Fund project *South East New Energy* in January 2022 will further identify and tackle barriers to rapid decarbonisation by focussing on community energy, large energy users, net-zero housing (including retrofit) and piloting innovation opportunities.

KCC's position in the partnership should enable us to focus on some of these key priorities and benefit from shared objectives of the wider collective in adopting best practice and learning across our local economy.

4 Financial Implications

Public sector funding

- 4.1 Most of the projects/initiatives outlined above are funded from Government and European Union grants and funding streams. Historically, the European funds (especially ERDF) have been especially important in supporting the low carbon agenda, and much of our business support activity has been reliant on these sources. KCC does fund core staff roles within the Sustainable Business and Communities team and provides revenue funding totalling £277,000 per annum (21/22 budget) to both support the delivery of the Kent Environment Strategy and the Energy and Low Emissions Strategy and to enable match funding for the numerous Interreg schemes that are underway. The emerging risk for the future delivery of green economy activity is the end of Interreg funding in 2023 and the subsequent loss of 78% of the staff team currently engaged in activity contributing to the green economy work.
- 4.2 There is still some uncertainty regarding future funding, given that the last EU-funded projects will end in mid-2023. Further clarity around the framework for future funding has been provided in the Government Levelling Up White Paper released in February 2022 (see 3.6 above), but this offers limited opportunity to the County Council. Whilst we consider these implications we continue to seek to be as well placed as possible to take advantage of new funding streams and strategic partnerships as they develop, be that via Greater South East Energy Hub, Clean Growth Working Group, South East Local Enterprise Partnership, or other emerging partners.
- 4.3 The County Council is well-placed to contribute capability and knowledge to the ongoing development of a green economy in Kent. The Government's Heat and Buildings Strategy October 2021, Net Zero Strategy and Review October 2021, and Environment Act November 2021 are unclear in the short term whilst secondary legislation is enacted. Certainly, inclusion of circular economy principles and practice in upcoming waste frameworks has enabled these areas to be explored further for contractors and our own teams to realise potential benefits for the local green economy.

5 The scale of wider opportunities

- 5.1 The opportunity to explore partnerships with 'Green Energy' projects should not be overlooked. Clean Growth South East assessed investment in over 1,500 current and future clean growth projects and mapped a significant pipeline of Clean Growth investments expected in the South East of England in the short, medium, and longer term. In the short to medium term out to 2030, the most significant investments in the sector are expected to be in Offshore wind, Transport infrastructure (including major road infrastructure and port development projects), and in the development of regional Nuclear Power sites. Investment is also expected in power transmission, Oil & Gas Decommissioning, Energy Storage and Solar Photovoltaics.

- 5.2 In the longer term out to 2050, cumulative capital investments of £122bn are foreseen in the Clean Growth Sector with the largest investments being made in Offshore Wind, Transport and Nuclear projects. Smaller but still significant investment categories include Oil & Gas Decommissioning, some remaining gas exploitation, Solar Photovoltaics and Energy Storage. Offshore Wind, Transport and Nuclear represent consistent and significant opportunity areas for the South East Local Enterprise Partnership region and opportunities for public sector collaboration with industry to support and encourage investment in these areas could support Clean Growth across the region at a large scale. The assessment also shows support should be offered where possible to the continued growth in the areas of Oil & Gas Decommissioning, Solar Photovoltaics and Energy Storage.
- 5.3 It is noted that this modelling includes solely the initial capital investment in development of energy sector project sites, or in the construction of transport infrastructure projects of national significance. The assessment does not include the ongoing investments related to these new and existing developments for instance, spend necessary in maintaining transport infrastructure and in operating and maintaining renewable energy projects. In the offshore wind sector alone, operations and maintenance of projects located in the East and South East of England is expected to incur a total cumulative cost in the region of £30bn in the period up to 2050.
- 5.4 It is also noted that hydrogen developments have not been included for the purposes of our investment forecast analysis due to the limited published information sources in the region and across the UK at the time of this assessment. However, there are significant plans to develop hydrogen production facilities in the region in the planning pipeline. These caveats on the assessment provided indicate that the Clean Growth Opportunity for the region and its supply chains may be even more significant than the investment forecasts suggest.

6 Other implications

- 6.1 Other implications including legal, equalities and data processing are considered on a project-by-project basis as part of the governance for grant funding and project delivery. In a general sense, the increased scrutiny and tightening of standards and supply chain transparency means that the 'green economy' now resonates strongly with more stakeholders, communities, and the society as a whole. There are the obvious links of local and national planning constraints/opportunities that cut across many of the themes of this paper.

7 Conclusions and potential opportunities and priorities for the future

- 7.1 KCC has, for many years, been pro-active in championing and supporting the green economy both working in partnerships and directly supporting businesses via access to specialist advice and grants to invest in green infrastructure and processes to support a lower carbon economy. It is partly for that reason that we received the national Association of Directors of Environment, Economy, Planning & Transport (ADEPT) Delivering Clean Growth award in 2021. There

is an opportunity to build on this and extend it, in the light of the increasing salience of decarbonisation, to all aspects of Kent's economic strategy.

Supporting business opportunities

- 7.2 The Clean Growth South East programme has begun to build a recognisable programme, current database, and a network of businesses through delivery of the pilot programme. There is an opportunity to keep this running acting as an umbrella brand through which information and business opportunities relevant to the Clean Growth Sector across the South East Local Enterprise Partnership area can be cascaded. This activity could be managed by the SELEP (subject to its future funding and role), KCC or a nominated third party as appropriate. Low Carbon Kent will seek in 2022 to further build resources and an environmental toolkit to help transition more firms - whatever their sector - to a low carbon economy
- 7.3 Achieving clean growth goes hand in hand with reducing carbon emissions. The Clean Growth South East report explored how an analysis of the region's carbon footprint can inform the areas where practical support and achievable interventions targeting Clean Growth could have the greatest impact on carbon emissions across the region, targeting areas of the economy that contribute the greatest portions of the region's carbon emissions, transport, and domestic emissions.
- 7.4 It is recommended that interventions specifically supporting innovative companies in the transport and domestic energy efficiency sectors across the supply chain are considered, helping bring to market new services or solutions to address carbon emissions in these areas, and to support the growth of a local supply chain and base of expertise.

Working with larger firms

- 7.5 There may also be opportunities for specific projects or programmes to be run in collaboration with regional point source carbon emitters. These are identified points (organisational or sector specific) of largescale emissions the region with whom a targeted intervention could be developed. This will engage these emitters and, through action with them and their supply chain, focus on carbon emissions through energy efficiency at these sites and through their supply chains.

Mainstreaming decarbonisation

- 7.6 Beyond actions to support firms in the 'vanguard' of decarbonisation, public sector support for business could be linked with greenhouse gas reductions, with Key Performance Indicators focussed on achieving ambitious emissions reductions, (as well as more traditional measures such as the number of businesses targeted, jobs created or GVA generated).
- 7.7 More broadly, delivering a lower carbon Kent will be central to the emerging Kent and Medway Economic Strategy, reflecting the themes set out in this paper (and building on the additional evidence base in the Clean Growth South East report). The reduction in emissions from KCC financial support for

business is likely to be a tiny fraction of what KCC can, and should, itself achieve. Therefore, although beyond the scope of this paper, this will also need to be reflected in KCC's approach to transport, property and other areas in which the Council can make a significant contribution to decarbonisation.

8. Recommendation(s)

8.1 The Cabinet Committee is asked to note current and planned activity to support the development of the green economy in Kent.
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Annex 1: Defining the low carbon 'sector'

Since 2015, data collected by the Office for National Statistics (ONS) via a survey of business within the LCREE definition has been the primary source of official information on LCREE activity in the UK and is used by BEIS as the official metric to quantify the Clean Growth economy.

The Office for National Statistics (ONS) also reports annually on the Environmental Goods and Services Sector (EGSS) framework, adopted under the United Nations System of Environmental Economic Accounting. The EGSS is made up of areas of the economy engaged in producing goods and services for environmental protection purposes, as well as those engaged in conserving and maintaining natural resources, aiming to quantify the green economy.

For the Clean Growth South East study commissioned using South East Local Enterprise Partnership (SELEP) funding, KCC and partners adopted a definition for the clean growth sector in line with both LCREE and EGSS frameworks, against which to quantify and measure the performance of the local sector. This definition details sub-sector categories, mapped against the relevant Standard Industrial Classification (SIC) Codes covering key business classifications that contain energy, low carbon, and renewables activity.