



The south west has varied economic activity with the key sectors being tourism - worth £6bn Gross Value Added (GVA) to the area; logistics - port activity is significant for import export due to poor road infrastructure encouraging short sea shipping and contributes £16.4bn to UK GVA; fishing - largest commercial fleet in England landing a value of £36m in 2014; communications - the south west region is a landing point for a significant number of transatlantic cable connections; as well as advanced manufacturing, renewable energy and military.

There are four local enterprise partnerships of relevance in the south west marine plan area: Cornwall and Isles of Scilly, GFirst (Gloucestershire), Heart of the South West, and West of England. The aims of these organisations are the creation of additional employment and to increase GVA.



Opportunities

- O1. potential for green energy projects in the Severn Estuary and off the Cornwall coast - tidal lagoons to have tourism and recreation functions [1]
- O2. identify and protect areas of future aquaculture potential, a sector underrepresented in the south west despite good environmental conditions [1]
- O3. development of ports and harbours in response to the UK and international needs as identified in port and harbour masterplans (Bristol's container docking facility construction) [1, 2]
- O4. diversification of tourism activities to provide sustainable maritime year-round employment potential in areas reliant on this industry such as Salcombe [1, 2]
- O5. encourage local workforce training to respond to growth areas (seafish training) and maintain local knowledge of specific maritime sectors (South West Employment and Skills Partnership) [3, 4]

Challenges

- C1. balancing need to expand or maintain port and harbour activity with environment needs (Falmouth Harbour and maerl beds) [1]
- C2. sustaining dredging regimes around ports to maintain access and safe navigation to ensure continued competitiveness (HMNB Devonport and Bristol Port) [2]
- C3. economic challenges for coastal communities with reliance on a limited number of sectors (fishing, tourism, recreation)
- C4. sector growth is constrained by environmental limits and isolation due to lack of terrestrial infrastructure in turn limiting financial investment and skills development



Evidence sources

[1] MMO Coastal Offices expertise on locally relevant issues
[2] Marine Policy Statement

[3] MMO1119 Economic baseline for marine plans (in press)
[4] SA report cards