



A future for Maritime Cornwall: The draft Cornwall Maritime Strategy

Public Consultation
8 September 2011

Enfusion and Jim Claydon for Cornwall Council



Covering Letter

Date: 7 December 2011

Dear Stakeholder

A Future for Maritime Cornwall: The Draft Cornwall Maritime Strategy 2011-2030 Public Consultation

With the help of a number of stakeholders we have been working towards the production of a Cornwall Maritime Strategy in order to consider peoples aspirations for the future of Maritime Cornwall and to ensure that this is used as a guide by Cornwall Council when considering development of policy, action plans and operations.

We would like to seek your views on this draft Cornwall Maritime Strategy and supporting documents and would be grateful for your input via the short online questionnaire.

In addition, there is a discussion paper and separate questions seeking your views on creating a Maritime Forum for Cornwall.

This really is a first step for Cornwall and we would hope that this Maritime Strategy will be built upon in the future in order to take account of and support the diverse range of maritime interests that we have.

Even though it is not a statutory plan, once adopted by the Council we would like to see it sat beside and linked to the Core Strategy, the Local Transport Plan, Sustainable Communities Strategy, the Economic Strategy, and the Green Infrastructure Strategy.

Please read the Draft Cornwall Maritime Strategy and supporting documents and complete the questions which can be found highlighted in yellow boxes throughout the text. If you would like paper copies, they are available to view at each of the One Stop Shops or on request by contacting **0300 1234 141** or emailing **maritimestrategy@cornwall.gov.uk**

This public consultation finishes at 5pm on 18 January 2012

I hope that you will make your views known.

Yours sincerely

**Julian German CC
Portfolio Holder for Maritime
Cornwall Council**

A future for Maritime Cornwall:
The draft Cornwall Maritime Strategy

**Cornwall Council
 Public Consultation**

Date:	08 September 2011	
Prepared by:	Toney Hallahan Jim Claydon Ruth Thomas Barbara Carroll Jake Gorton	Enfusion Jim Claydon Ltd Enfusion Ltd Enfusion Ltd Enfusion Ltd
with support from:	Cornwall Council Maritime Strategy Project Team	
Checked by:	Barbara Carroll Project Working Group	Enfusion Cornwall Council
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enfusion

environmental planning and management for sustainability



Treenwood House
 Rowden Lane
 Bradford on Avon
 BA15 2AU
 t: 01225 867112
www.enfusion.co.uk

We would be grateful if you could please fill in your details and answer the questions highlighted in yellow text boxes throughout this document;

Name	
Tel. no.	
Address	
E mail address	
Position (if applicable)	
Service/Team (if applicable)	
Organisation (if applicable)	

Data Protection

The data is collected by Cornwall Council as data controller in accordance with the data protection principles contained within the Data Protection Act 1998. The purpose for collecting the data is for processing the results of this consultation. Any personal data collected will not be shared with any third parties. If you have any concerns regarding the processing of your data then please contact Philippa Hoskin whose contact details are below.

Are you responding as an individual?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If yes, please complete the Equalities Monitoring Form on page 4

Please note that you only need to complete the Equality Monitoring Form if you are responding as an individual, not if you are responding on behalf of an organisation.

If no, please go straight to page 5

Equality Monitoring Form

Cornwall Council is committed to ensuring that our services, policies and practices are free from discrimination and prejudice and that they meet the needs of all the community. For us to check we are providing fair and effective services, we would be grateful if you would answer the questions below. You are under no obligation to provide the information requested, but it would help us greatly if you do.

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About you:

Please enter your postcode

Please give your age

How do you describe your Gender?

Female	Male
<input type="checkbox"/>	<input type="checkbox"/>

How do you describe your ethnic origin? (the ethnic group that you feel most closely reflects your background).

White (e.g. British, Scottish)	<input type="checkbox"/>
Mixed (e.g. White and Asian)	<input type="checkbox"/>
Asian or Asian British	<input type="checkbox"/>
Black or Black British	<input type="checkbox"/>
Cornish	<input type="checkbox"/>
Other Ethnic Group	<input type="checkbox"/>

Do you consider yourself to have a disability?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

Is there anything we can do or put in place which would make it easier for us to offer you an equal service? (For example documents in large print, hearing loop etc).

Do you need someone to help you understand information? (For example someone to read documents with you or an interpreter).

It would help the Council to know of any barriers you have faced when dealing with us.

The draft Cornwall Maritime Strategy 2011 – 2030

Public Consultation

Foreword

Cornwall is truly a maritime region and our culture and heritage have been heavily influenced by our proximity to the sea. Cornwall Council recognises the importance of the maritime sector together with the maritime environment and all that it supports.

Cornwall's rich and varied maritime cultural heritage, of fishing, trade, industry and communications has contributed to people's sense of local distinctiveness, place and cultural identity and is recognised as being a nationally important resource

In modern day Cornwall the maritime world is diverse and consists of everything from surfing to fish markets, from the industries of ship repair and boatbuilding to sailing around one of our many ports and harbours, from gig racing to marine renewable energy. Our marine sector also depends on a healthy and diverse marine environment.

We have worked hard to engage the support and expertise of a wide range of stakeholders during the production of the Cornwall Maritime Strategy and we are grateful for their invaluable input. This is a first step which we hope will result in ensuring maritime issues are at the forefront of peoples' minds.

Cornwall's marine sector accounts for almost one in seven marine jobs in the UK and 8% of the UK's marine industry turnover. Overall it is estimated that Cornwall's marine industry sector contributes more than £130M to the Gross Domestic Product of Cornwall, supporting 14000 jobs. The development potential of Cornwall's maritime sector will be critical to the region's future, long term prosperity.

Tourism is also central to Cornwall's economy; we attract around 5 million visitors annually, who spend £1.2 billion and support 38,000 jobs – 16% of all employment. Our marine and coastal environment, landscape and activities are a key factor in people choosing Cornwall as a holiday destination.

Cornwall's marine and coastal environment draws people from throughout the world. The sheer diversity of maritime wildlife makes Cornish waters a biodiversity hotspot demonstrated in the number of nature conservation and landscape designations covering the sheltered muddy creeks of our estuaries, rugged granite cliffs, rocky reefs, islands and beaches to more specialist habitats such as the ancient maerl beds – the Cornish equivalent of a coral reef, all supporting an amazing array of species including commercially important fish and shellfish.

A high level Cornwall Maritime Strategy represents an important opportunity to engage with all maritime interests. The Strategy will guide the future direction of work, increase the recognition of the importance of the maritime sector and respond to the various challenges and opportunities that lie ahead.

Kyns-skrif a'n Strateji Morek Kernow 2011-2030 Kusulyans Poblek

Raglavar

Kernow yw yn hwir ranndir morek ha'gan gonisogeth hag ertach re beu delenwys yn poos der agan nester dhe'n mor. Konsel Kernow a aswon posekter an rangylgh morek war-barth gans an kerhynnedh morek ha puptra a skoodh ev.

An ertach gonisegethel morek rych ha liesek a Gernow, a byskessa, kenwerth, diwysyans ha keskomunyans re gevros dhe omglewans a dhiblanseth, tyller ha honanieth wonisogethel leel a dus hag yth yw aswonnys avel asnodh posek kenedhlek.

Yn Kernow a'n jydh hedhyw an bys morek yw divers hag y syns ynno puptra a vordardha dhe varhasow puskes, a dhiwysyansow ewnans lestri ha drehevel lestri dhe wolya a-dro dhe onan a'gan lies porth, a resek skathow-hir dhe nerth nowythadow morek. Agan rangylgh morek ynwedh a greg war gerhynnedh morek divers ha yagh.

Ni re oberis yn kales dhe omworra gans an skodhyans ha konnykter a gevres a gevrenogyon dres askorrans an Strateji Morek Kernow hag yth on ni synsys a'ga ynworrans a bris uhel. Hemm yw kynsa kamm a dhiwedh, del waytyn, ow surhe bos daldraow morek orth bleyn a brysow tus.

Rangylgh morek Kernow a gompt rag ogas hag onan yn seyth soodh morek y'n RU hag 8% a'n treusyans diwysyans morek an RU. Dre vras yth yw dismygys y hwra rangylgh diwysyans morek Kernow kevri moy es £130mvl dhe'n Kowal-Askor Tre a Gernow, yn unn skoodhya 14,000 soodh. Galadewder displegya rangylgh morek Kernow a vydh posek dres ehen dhe sewena dhevedhek hirdermyn an ranndir.

Tornyaseth ynwedh yw kresel dhe erbysieth Kernow; ni a denn a-dro dhe 5 milvil havyas pub bledhen, neb a spen £1.2 bvl ha skoodhya 38,000 soodh – 16% a bub arveth. Agan kerhynnedh, tirwel ha bewderyow morek hag arvorek yw rann a vri rag tus dhe dhewis Kernow avel pennhyns dy'gool,

Kerhynnedh arvorek ha morek Kernow a denn tus a-dhyworth an bys dien. An dhiverseth pur ewn a wodhvevnans morek a wra an dowrow Kernewek dhe vos tyllertomm bewdhiverseth, diskwedhys y'n niver a apoyntyansow tirwel ha gwithans natur, synsys ynna an heyllynow leysek klys a'gan heyllyow, alsyow growanek garow, kribow karnek, enesow ha trethow, dhe vevvaow moy arbennek kepar ha hen weliow marl – an ekwal kernewek a grib goral, oll anedha ow skoodhya array barthusek a ehennow, y'ga mysk puskes ha pysk-krogenyek posek yn kenwerth.

Strateji Morek Kernow a nivel uhel a omdhiskwedh avel chons posek dhe omworra gans pub les morek. An Strateji a wra gedya an tu devedhek a ober, kressya aswonnvos posekter an rangylgh morek, ha gorthebi dhe'n chalenjys ha chonsyow divers usi a-dheragon.

Executive Summary

The draft Maritime Strategy for Cornwall covers the period 2011-2030 and when complete, will provide a unifying and long-lasting policy framework for the planning of Cornwall's land, sea and coast well into the 21st century.

The Strategy proposes the following vision for Maritime Cornwall:

By 2030:

- **Cornwall has a sustainably managed maritime environment, known internationally as an excellent location for work, wildlife and for leisure;**
- **Cornwall's economy is supported by a diverse range of ports, marine-related industries and businesses including environmental technologies; and**
- **Cornwall has a rich maritime heritage, distinctive communities and a healthy maritime natural environment and landscape of which its residents and visitors are justifiably proud.**

This vision is underpinned by seven overarching and cross-cutting themes, each including short, medium and long term aims to help deliver the overall vision for Maritime Cornwall:

- A.** A joined-up approach
- B.** A sustainable future
- C.** Encouraging maritime enterprise and innovation
- D.** Healthy and resilient coastal communities
- E.** A working peninsula
- F.** Connecting land and sea
- G.** Pride, recognition and responsibility for cultural, natural and historic assets

Once finalised, it is the intention that this Maritime Strategy is adopted by Cornwall Council and will be used by the Council to guide the development of policy and programmes across its operations and in its work with other organisations, stakeholders and the community.

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1 The Cornwall Maritime Strategy - an Introduction

1.1 Why do we need a Cornwall Maritime Strategy?

Cornwall has a unique environment and history that is strongly influenced by the sea. With a coastline stretching for over 400 miles and no place further than 20 miles from the coast, Cornwall's future wellbeing will depend on the marine and coastal environment and its management - more so than for most other local authority areas in England.

Planners have historically focused on land use and land based activities, however with increasing pressures on the marine environment and coastal areas, there is a need to integrate maritime issues into spatial and land use planning and to work towards better planning and management of the maritime area¹.

This draft Maritime Strategy for Cornwall is a step in this direction. To help integrate maritime issues into its policy and strategy framework, the Strategy is being prepared alongside Council's Sustainable Communities Strategy 'Future Cornwall', the Local Transport Plan 'Connecting Cornwall: 2030' and the Cornwall Local Development Framework. It also provides an opportunity to consider people's aspirations for Cornwall's maritime future alongside the Council's wider plans for a Green Cornwall.

This is the first time that a dedicated Maritime Strategy has been produced for Cornwall. The draft Maritime Strategy covers the period 2011-2030 and when complete, will provide a unifying and long-lasting policy framework for the planning of Cornwall's land, sea and coast well into the 21st century. The Strategy will be used by the Council to guide the development of policy and programmes across its operations and in its work with other organisations, stakeholders and the community.

Once finalised, it is the intention that this Maritime Strategy is adopted by Cornwall Council and its key partners and that it will then sit alongside and be linked to the Core Strategy, the Local Transport Plan², Economic Strategy³, Cornwall Area of Outstanding Natural Beauty Management Plan, the Green Infrastructure Strategy, Shoreline Management Plan, South West Marine Plans and others. The objectives of the Maritime Strategy will be reviewed on a 5 year basis.

1.2 Where is Maritime Cornwall?

Whilst this is a maritime strategy for all of Cornwall; the Strategy's focus is on the coastal zone and the waters off Cornwall's coast (the inshore zone) from the Tamar Estuary to Land's End to Marsland Mouth. The Isles of Scilly are not covered by this strategy although the significance of their links with Cornwall are recognised.

¹ Whilst marine means relating to or found in the sea, maritime refers to matters or places that border on the sea; or are connected with the sea (Oxford Dictionary, 2010). See glossary and section 1.2 for further details.

² Connecting Cornwall: 2030

³ Cornwall Council Economic Ambition - White Paper

The coastal zone includes natural features such as dunes, rocky shores, coastal cliffs and grasslands, estuaries and intertidal areas. Coastal communities and built features including coastal towns and villages, ports and harbours are also included in the strategy along with heritage assets. No precise boundary between land and sea exists as the inter-tidal area is constantly changing and is covered by more than one administrative regime.

The inshore zone includes the waters off the coast up to a 12 nautical mile limit, however where relevant issues are outside of this zone (for example, potential offshore energy projects), they have been considered in the Strategy.

1.3 Cornwall's Maritime Character

Cornwall's marine and coastal environment and distinctive geography provide the setting for this strategy. Its geology, wildlife, landscapes and seascapes have heavily influenced Cornwall's history and still today help to forge its character and cultural identity, whilst providing the basis for a strong maritime economy and coastal communities. The seas around Cornwall contain a unique, rich and varied heritage - both cultural (for example, historic wrecks) and ecological. Historically the extensive and varied coastline was a base for fishing, shipping, industry and transport and the traditional coastal communities that have developed are now the mainstay of today's tourist industry. Cornwall's unique coastal setting, its Area of Outstanding Natural Beauty and the South West Coast Path also provide a consistent draw for tourists, such that tourism now plays a significant and growing role in the Cornish economy.

Cornwall's ports, harbours and rivers play an important role in the transportation of goods, services and passengers around the coast and to destinations in UK waters and beyond. Ports and harbours are vital to Cornwall's character and maritime activity. They are important contributors to the economy serving as gateways into and out of the region and providing a base for trade and employment serving local, national and international markets. For a long period agriculture, fishing, mining and mineral extraction (most particularly china clay) have fuelled Cornwall's economy and shaped its landscape. Boat building and repair are growing industries and renewables and marine-related environmental technology continue to expand providing opportunities for local businesses.

With 11 European and 61 national coastal and marine nature conservation sites and much of its coast subject to protective landscape designation, Cornwall has a justified reputation for its natural beauty and marine and coastal wildlife.

High quality beaches and bathing waters help attract tourists and locals alike to engage in outdoor recreation and water sports, including surfing, angling, sailing, walking and boating, alongside activities such as coasteering, kayaking and kite-surfing, or simply relaxing on the beach. In deeper waters yachting, recreational fishing and diving also attract active visitors.

1.4 How this draft strategy was prepared

Consultants Enfusion and Jim Claydon were commissioned by Cornwall Council in June 2010 to assist in preparing a high level and strategic document to guide Cornwall's maritime future and the Council's maritime functions.

Working closely with the Council's multi-disciplinary Maritime Strategy Project team, the project began with an information and evidence gathering exercise and consideration of Cornwall Council's activities and wider plans and strategy documents. This information was summarised into nine themed topic chapters, which can be found in the Annex: Background Information:

- 1 The marine and coastal environment
- 2 Maritime and coastal heritage and culture
- 3 Maritime economy and regeneration
- 4 Climate change
- 5 Renewable energy and resource industries
- 6 Maritime tourism and recreation
- 7 Maritime transport
- 8 Fisheries and aquaculture
- 9 Communities and education

For each of these topics, key opportunities and issues were identified and are detailed in the annex.

A key element in the preparation of this strategy was a one day stakeholder workshop held in October 2010, to which various maritime stakeholders from across Cornwall and neighbouring authorities contributed their aspirations, issues and ideas about the future for maritime Cornwall.

Subsequently, emerging ideas for the strategy were grouped in overarching cross-cutting themes, which were then developed into a draft vision, aims and a more detailed strategy for Maritime Cornwall. Further revision then took place with the Council's Maritime Strategy Project Team.

Those stakeholders who were invited to the workshop and other interested parties were asked to comment on an informal consultation draft in December 2010. The comments received were then considered and incorporated, where possible into the current draft Strategy and background annex which is the subject of this public consultation.

The final draft will be considered by elected members of Cornwall Council.

2 The future for Maritime Cornwall

2.1 The wider picture - marine planning in the UK

The need for marine planning was recognised by government in the Marine and Coastal Access Act (2009) and publication of the Marine Policy Statement (MPS) in March 2011. Marine plans that cover matters relating to marine development and conservation will be produced over the next few years for areas across the UK. They will be prepared by the Marine Management Organisation (MMO), together with local authorities and other agencies. Cornwall sits within the South West England inshore plan area (including the Severn Estuary coast to the north and South Devon coast to the east); which is in turn enveloped by the South West offshore plan area (map available at: http://marinemangement.org.uk/marineplanning/areas_all.htm).

The MPS sets out the UK's high level marine objectives and the requirements for marine plans. In advance of the production of these plans Department for the Environment Food and Rural Affairs will identify Marine Conservation Zones (MCZ) as part of the Marine Protected Areas network in 2012. This will be based on recommendations from local stakeholders involved in Finding Sanctuary, a partnership project which aims to secure a healthy and productive future for the coasts and seas of south-west England.

Before producing the plans, the MMO will conduct a strategic scoping exercise to provide an understanding of how realistic objectives can be developed in each Marine Plan area, whilst being consistent with national objectives and targets. Cornwall's Maritime Strategy will be a significant input into both the strategic scoping exercise and the Inshore Marine Plan for South West England and its production will therefore ensure that Cornwall is better prepared to influence the Marine Plan.

2.2 Which factors will influence the future of Maritime Cornwall?

Alongside the national and local policy context, there are a range of other factors that are likely to influence the future of maritime Cornwall. Whilst the future is difficult to predict, trends can help point us to the challenges that are likely to be faced over the lifetime of the strategy. In developing the draft strategy, these key trends or future drivers helped to predict likely future issues and opportunities. The key trends that may affect maritime Cornwall are summarised in table 2.1.

Table 2.1 Key trends and factors influencing Maritime Cornwall 2011-2016

National marine policy

- The new policy focus on marine planning and conservation at the European and national level (including designation of Marine Protected Areas) will continue. This responds to increased competition for space in the maritime area and a need to seek compromise and agreement between sectors and interests.

Economic interest

- Commercial interest in marine resources will increase, recognising potential economic and social benefits, including energy, exploitation of seabed resources, marine food resources and pharmaceuticals.

Governance

- Localism is championed by central government and Cornwall Council, providing opportunities for communities to exercise greater control. The demise of regional planning and creation of the unitary authority in Cornwall gives more power to the Council to shape the local agenda.

Investment

- The economic recession and central and local government cutbacks are likely to limit funding and investment, however, Cornwall still has funding and investment opportunities, such as the European Convergence programme.

Demographics and housing

- Development pressure and housing affordability on the coast is already a significant problem and is likely to be exacerbated due to a decrease in house build rates during the current economic downturn, second home ownership, continued migration into Cornwall and smaller household size.

Travel and leisure

- More people are choosing to holiday in the UK, with increased visitor numbers in Cornwall likely. The tourist season is extending and growth is likely in the leisure industry, especially adventure and sustainable tourism.

Climate change

- Global warming may lead to increasingly uncertain weather patterns, particularly if the Gulf Stream weakens. Negative effects include sea level rise, acidification, changing species distributions and increased flood events.

Green Cornwall and the Energy Peninsula

- Cornwall aims to become a world leader in renewable energy and sustainable development and is developing a low-carbon economy, including enhanced capacity in wind, solar, wave and tidal power.

Rising oil prices and peak oil

- The resulting increase in travel and transport costs will drive solutions such as alternative fuel sources, sustainable transport, and more local food and goods production. Coastal shipping may be more important for the movement of goods, increasing the role of small ports.

Sustainable fisheries and aquaculture

- Maintaining sustainable fish and shellfish stocks is important and will be controlled by the MMO and CIFCA (Cornwall Inshore Fisheries and Conservation Authority). Consumer demand for sustainably sourced fish is likely to increase.

Natural and historic environment

- There will be continued pressure on, and degradation of the natural and historic environment, jeopardising the future value of environmental goods and services.

Technology and internet

- Technological innovation will continue apace. Knowledge-based industries, including those with a maritime theme, will continue to expand. Improved information technology makes Cornwall a more attractive place to do business.

3 The draft strategy

3.1 A vision for Maritime Cornwall:

By 2030:

- Cornwall has a sustainably managed maritime environment, known internationally as an excellent location for work, wildlife and for leisure;
- Cornwall’s economy is supported by a diverse range of ports, marine-related industries and businesses including environmental technologies; and
- Cornwall has a rich maritime heritage, distinctive communities and a healthy maritime natural environment and landscape of which its residents and visitors are justifiably proud.

This vision is underpinned by seven overarching themes, each including a high-level objective and short, medium and long term aims to achieve the objective. Once agreed, the draft strategy will be further developed into an action and implementation plan. The themes are:

- A. A joined-up approach
- B. A sustainable future
- C. Encouraging maritime enterprise and innovation
- D. Healthy and resilient coastal communities
- E. A working peninsula
- F. Connecting land and sea
- G. Pride, recognition and responsibility for cultural, natural and historic assets

Question 1. Regarding Section 3.1: Do you agree with the wording of the vision for Maritime Cornwall?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve the Vision?

3.2 The draft Strategy

A. A joined-up approach...

Objective A: To work towards more integrated approaches to managing the maritime area, encouraging partnership working across organisational, sectoral and geographic boundaries

Aims

- A1** Establish a Cornwall Maritime Forum open to those organisations with an interest in the marine and coastal environment and economy; with the objective of further promoting and coordinating maritime interests in Cornwall.
- A2** Implement a simplified and coordinated approach to management and decision making in the maritime area, both within the Council and working with partner organisations on economic development and based on the principles of Integrated Coastal Zone Management (ICZM).
- A3** Ensure that maritime, coastal and terrestrial concerns and issues are planned in an integrated way within a coordinated framework of plans and strategies.⁴
- A4** Continue to encourage and support cross-border integration and cooperation with France, the Isles of Scilly, Devon and Plymouth (including through the Tamar Estuaries Consultative Forum) and other South West counties over the management of the maritime area.
- A5** Ensure Cornwall is well prepared to influence and engage with Marine Planning and the designation and management of Marine Protected Areas in the South West through setting up appropriate governance arrangements with relevant authorities and stakeholders and developing a strong evidence base⁵.
- A6** Work in partnership with the Marine Management Organisation to assist in the delivery of its functions and where there is overlap with the Local Planning Authority at the coast. Support improved inter-agency management and enforcement of local byelaws, fisheries legislation and Marine Protected Areas.
- A7** Aim to produce a maritime Supplementary Planning Document for Cornwall.⁶
- A8** Consider producing maritime action plans including place-based action plans which support the objectives and strategies set out in this document.
- A9** Develop a network of maritime champions within the Council and partner organisations.

⁴ Examples of taking an integrated approach include Shoreline Management Planning and work on Cornwall Beach Management Strategy and Estuary Management Plans. Another example is to undertake an integrated assessment of landscape and seascape, including historic landscapes/seascape.

⁵ For example by building upon the data collation for the Finding Sanctuary Regional Profile and the Coastal Observatory.

⁶ This would enable maritime policies to become a material consideration in the development control system. Appropriate developer levies could also be considered to contribute to the management of the maritime area.

Question 2. Regarding Section 3.2 Objective A: A joined-up approach...

Do you agree with this objective and the aims A1-A9 listed?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve this section?

B. A sustainable future...

Objective B: To work towards a sustainable, low-carbon future for maritime Cornwall that encourages appropriate economic growth and protection of Cornwall's unique natural environment

Aims

- B1** Work to enhance the economic and sustainable use of marine resources⁷, including sustainable fisheries, shellfisheries and aquaculture and identify and pursue opportunities that integrate both environmental and economic objectives.⁸
- B2** Promote the development of the marine renewables industry, including supporting research and development into wave, tidal and wind energy.
- B3** Protect Cornwall's unique and distinctive maritime natural and historic environment and seek opportunities for environmental growth and enhancement through habitat creation and species recovery and sustainable management.⁹
- B4** Support the implementation and management of the UK Marine Protected Area network, maximising opportunities for collaborative working with other designated areas such as the AONB where appropriate.
- B5** Support work to maintain and improve Cornwall's water quality (inland and coastal), implementing the Water Framework Directive and working with other organisations to minimise sources of litter and pollution and to control invasive species.¹⁰
- B6** Seek to minimise and manage noise and light pollution and wildlife disturbance in coastal areas, including noise from water craft and light pollution from shipping and coastal development.
- B7** Gain a better understanding of the potential for in-combination and cumulative effects of plans and projects on the marine natural and historic environments and the risks and opportunities presented by climate change.
- B8** Encourage the use of sound environmental practices by businesses, landowners and other organisations operating in the maritime area and river catchments.

⁷ For example, through environmental accreditation schemes.

⁸ For example, the Wave Hub

⁹ Examples include through the Cornwall Biodiversity Action Plan and Shoreline Management Plan process. This will help to increase resilience of the natural and historic environments to the effects of climate change and other cumulative pressures.

¹⁰ For example through initiatives such as Fishing for Litter and Clean Cornwall

Question 3. Regarding Section 3.2 Objective B: A sustainable future...

Do you agree with this objective and the aims B1-B8 listed?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve this section?

C. Encouraging maritime enterprise and innovation...

Objective C: To promote maritime enterprise as a key component of Cornwall's economic revitalisation and international excellence

Aims

- C1** Work towards securing a sound economic future for Cornwall through working with industry to provide a wide range of jobs/skills in maritime employment.
- C2** Support the Cornwall Economic Forum, Local Enterprise Partnership (LEP) and Cornwall Marine Network in promoting and developing maritime enterprise.
- C3** Help Cornwall to develop excellence in the provision of marine education and training across the full range of maritime industries and the environment (including higher education and vocational training).
- C4** Harness the potential of marine renewables within the context of a broad-ranging strategy for sustainable energy production in Cornwall to create an internationally recognised centre of excellence.
- C5** Support the infrastructure required for maritime enterprise, including the availability of high speed broadband.
- C6** Build on existing strengths of the maritime economy including ports and shipping, sustainable recreational and commercial fishing, ship repair, leisure, superyacht and boat construction, marine renewables and emerging knowledge-based industries.
- C7** Promote and support the role of tourism in local economic development, including sustainable tourism, adventure tourism, and seaside holidays.

Question 4. Regarding Section 3.2 Objective C Encouraging maritime enterprise and innovation...

Do you agree with this objective and the aims C1-C7 listed?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve this section?

D. Healthy and resilient coastal communities...

Objective D: To ensure Cornwall has healthy, safe and vibrant coastal communities that have a strong relationship with the sea and coastal environment

Aims

- D1** Use programmes and initiatives to nurture the strong relationship between coastal and inland communities and the sea, coast and beaches.¹¹
- D2** Understand the value of the marine environment in supporting active and healthy lifestyles; promote beach and water-based activities to visitors and locals of all ages and abilities.¹²
- D3** Promote coastal walking and cycling as a means of healthy and enjoyable transport; continue to promote and enhance the South West Coast Path.
- D4** Support sustainable levels of water-based and coastal recreational activities including sailing, surfing, angling and diving – for residents and visitors.
- D5** Support regeneration initiatives that maintain the viability and vibrancy of coastal towns and villages.¹³
- D6** Ensure coastal communities are well-prepared for future events and shocks, including natural hazards, climate change, coastal change and socio-political changes¹⁴. Particular focus will be given to preparing for sea level rise.
- D7** Support and work in partnership with the police and other enforcement agencies to reduce crime and anti-social behaviour in the maritime area.

¹¹ For example, through Adopt-a –Beach schemes, Coastal Partnerships and 'Sense of Place', a lifelong learning programme that promotes local distinctiveness.

¹² Through organisations and initiatives such as the Blue Gym (www.bluegym.org.uk) in association with health providers.

¹³ For example through Town and Parish Plans

¹⁴ For example, through Shoreline Management Planning and Emergency Plans.

Question 5. Regarding Section 3.2 Objective D Healthy and resilient coastal communities...

Do you agree with this objective and the aims D1-D7 listed?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve this section?

E. A working peninsula...

Objective E: To recognise, protect and further develop the 'working harbour' role of Cornwall's estuaries, ports and harbours

Aims

- E1** Work towards more coordinated management of and advocacy for ports and harbours, to encourage further economic development and minimise conflicts between operational, leisure and environmental uses¹⁵.
- E2** Analyse the strengths, issues and opportunities in relation to Cornwall's ports and harbours to gain a better understanding of their roles.
- E3** Future-proof maritime areas for maritime-related business and community uses through protecting waterfront land in urban environments and ensuring that ports and waterfront locations are at the heart of regeneration schemes.
- E4** Protect port infrastructure where it is sustainable and economically viable to do so.
- E5** Encourage the development of maritime-related industry and associated facilities.
- E6** Promote port development that facilitates the expansion of other economic activities, including renewable energy, leisure and freight handling. Encourage the evolution of Cornwall's ports and harbours so that they continue to be an important part of modern maritime Cornwall.
- E7** Ensure that ports and the coast accommodate the promotion of leisure/recreational activities and coastal access without adverse effects on economic activity and environmental quality.
- E8** Maximise the opportunities for supporting and promoting sustainable local fisheries and aquaculture; including the provision of shore side facilities for handling and processing landings.
- E9** Promote opportunities for recreational sea angling and support conservation management of Cornwall's inshore waters.

¹⁵ One example of how this may be achieved is through creating zones for leisure based activities in waterways, rivers and in ports.

Question 6. Regarding Section 3.2 Objective E a working Peninsula...

Do you agree with this objective and the aims E1-E9 listed?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve this section?

F. Connecting land and sea...

Objective F: To better connect Cornwall's coastal communities and destinations and support sustainable, low carbon transport

Aims

- F1** Further develop and promote water-based movement, for freight, commuting and leisure and develop infrastructure that caters for changes to maritime trade and transport.
- F2** Seek design solutions to better connect people with waterfront land, the sea and estuaries (including walkways, attractive public realm design, public slipways and boating facilities and the removal of physical barriers)¹⁶ and seek to ensure that coastal communities are better connected to each other.¹⁷
- F3** Improve inter-modal connections with terrestrial transport (for example coordinating bus and ferry timetables) to ensure truly integrated transport.
- F4** Ensure efficient use of waterfront infrastructure, for example through investigating the shared use of facilities.
- F5** Deliver measures to enhance and support the South West Coast Path and coastal public open spaces, including beaches.

Question 7. Regarding Section 3.2 Objective F Connecting land and sea...

Do you agree with this objective and the aims F1-F5 listed?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve this section?

¹⁶ For example strategically through Connecting Cornwall Local Transport Plan. One practical example is to provide pedestrian crossings and use traffic calming measures on busy roads and investigating misconnections and improving and developing multi-use paths,

¹⁷ For example through investigating misconnections and improving and developing multi-use access paths.

G. Pride, recognition and responsibility for cultural, natural and historic assets ...

Objective G: Cornwall's natural and maritime historic environment and culture is renowned worldwide, and is a source of pride and inspiration to residents and visitors

Aims

- G1** Inspire and engage people about Cornwall's coast and seas and encourage them to have pride in the marine environment in active partnership with the Council.¹⁸
- G2** Support the existing Voluntary Marine Conservation Areas.
- G3** Promote within Council departments and beyond, a better understanding of the the marine and coastal natural and historic environments and ensure that relevant Council functions are undertaken with respect to these.
- G4** Promote and encourage maritime cultural activities and industries.¹⁹
- G5** Ensure Cornwall's unique maritime heritage is protected and enhanced through appropriate conservation and promotion.
- G6** Maintain and enhance the distinctive character of local coastal towns and villages; promote high quality seaside architecture and design that is sensitive to local seascapes, landscapes and townscapes.
- G7** Promote Cornwall's maritime history and its benefits to residents and visitors and encourage tourism that recognises, protects and enhances the maritime historic environment.²⁰
- G8** Further encourage maritime-based arts and cultural activities, including festivals, events and venues.²¹
- G9** Gain a better understanding of Cornwall's natural marine resources and their value to health and wellbeing, tourism, recreation and the economy and assess the status of landscape and seascapes in order to safeguard these assets.

¹⁸ For example, through encouraging participation in Clean Cornwall week; the Beachcare project, coastal fora and Voluntary Marine Conservation Areas.

¹⁹ For example sailing and yacht clubs, beach based holidays, the pilchard industry.

²⁰ By understanding the historical processes that have influenced the present marine and coastal environment, suitable policies can be developed for its future management. Examples include Polperro museum of smuggling and fishing, National Maritime museum, diving at historic wrecks

²¹ Examples include Henry Lloyd Falmouth Week and Tate St Ives

Question 8. Regarding Section 3.2 Objective G Pride, recognition and responsibility for cultural, natural and historic assets...

Do you agree with this objective and the aims G1-G9 listed?

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any suggestions on how we could improve this section?

Question 9. Do you have any general comments about the Draft Cornwall Maritime Strategy?

Development of a Cornwall Maritime Forum Discussion Paper and Questionnaire

Background

This discussion paper and questionnaire has been prepared by Cornwall Council as part of their work to engage with all maritime interests, increase the recognition of the importance of the maritime sector and respond to the various challenges and opportunities that lie ahead, such as the new Inshore and Offshore plans which need to be produced by the Marine Management Organisation.

The proposal for a Cornwall Maritime Forum has come out of the development of the draft Cornwall Maritime Strategy 2011-2030, which has involved considerable stakeholder input and is also the subject of this public consultation.

The Current Situation

There are currently a number of organisations and partnerships within Cornwall who focus on the coast and marine issues, but they tend to be specialist in their nature, such as the Cornwall Marine Network(business), the Cornwall Marine Liaison Group (environment), the Cornwall and Isles of Scilly Coastal Action Group (shoreline management) to name but a few. The Maritime Forum would seek to be an umbrella partnership bringing together everybody with a maritime interest to work across different sectors and provide a maritime voice for Cornwall when dealing with others which reflects our unique situation.

What could the Cornwall Maritime Forum deliver?

A Cornwall Maritime Forum could deliver a variety of services, examples of which are listed below:

- Create a network of informed maritime stakeholders from across all maritime sectors
- Increase the profile of maritime issues within Cornwall
- Ensure members of the Forum are better placed to engage with and respond to changes under the Marine & Coastal Access Act 2009 and wider EU legislation
- Promote an integrated approach to maritime matters within the county improving the cross-sectoral management of our coast and inshore waters
- Help to monitor and deliver the forthcoming Cornwall Maritime Strategy
- Provide a mechanism for developing cross-sectoral maritime projects and initiatives when required
- Ensure Forum members are aware of opportunities to engage in national debate and shape government policy
- Provide a voice for Cornwall on matters affecting our coastal communities, businesses and environment both within Cornwall and on the national maritime agenda
- Act as a conduit to disseminate information between government departments/ agencies/non-departmental public bodies (particularly the Marine Management Organisation) and maritime stakeholders in Cornwall
- Provide a platform to attract decision makers (e.g. from Defra and the MMO) to speak to a large audience in Cornwall, encouraging dialogue.

How could this be delivered?

Cornwall Council has no firm view as to which organisation(s) should coordinate the development of a Cornwall Maritime Forum, or how it should be funded and delivered. However, given the current economic climate, if there is a consensus in support of a Cornwall Maritime Forum, whichever model was adopted would have to demonstrate cost-effectiveness and partnership working.

It is envisaged that many of the potential actions of a Maritime Forum could be delivered through a website and e-newsletters, organisation of conferences, workshops and meetings and delivery of projects and initiatives for which funding would be sought.

Question 10. Do you consider that there is a need for a Maritime Forum for Cornwall?

- | | |
|--------------------------|---|
| <input type="checkbox"/> | Yes If yes, please continue with the questions below which request your thoughts specifically on the development of a Maritime Forum for Cornwall. |
| <input type="checkbox"/> | No If no, please go to Page 25 Annex Background Information and read onto the final question |

Question 11. The proposed Maritime Forum could offer a range of services.

Please Tick to show your level of agreement for potential Forum functions listed below;

Ideas	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Regular e-newsletters disseminating relevant information (e.g. consultations, events, legislative, policy and project updates) to Forum members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bi-annual Forum conferences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A Forum website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provides a formal conduit between members and government departments, agencies and Non Departmental Public Bodies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provides representation for maritime Cornwall on wider local, regional and national networks and platforms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Co-ordinates Forum responses to national debates and local consultations to ensure maritime issues are adequately considered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies and develops potential projects, strategies and policies relevant to maritime Cornwall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Question 13. Are there any other functions/services that could be provided but are not included above? If so, please describe below;

Question 14. Do you have any ideas about how a Cornwall Maritime Forum should be established, administered and coordinated?

Question 15. Funding of a new Forum could be secured through a number of options including membership fees, conference delegate fees and partnership contributions. Is it appropriate to raise revenue for the Forum through membership fees? Please mark with an 'x'.

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If yes, please suggest a figure for the annual membership fee?

For individuals £

For organisations £

Question 16. Would your organisation/team be able to offer additional annual financial support for the Forum through a partnership contribution scheme?

<input type="checkbox"/>	No
<input type="checkbox"/>	£1 - £500
<input type="checkbox"/>	£501 - £1,000
<input type="checkbox"/>	>£1000 - £5000
<input type="checkbox"/>	>£5000

Question 17. Would you, your organisation or team be able to offer additional support for the Forum? Please tick as many as is appropriate.

<input type="checkbox"/>	No
<input type="checkbox"/>	Providing conference/meeting facilities
<input type="checkbox"/>	Providing advice through seat on steering group
<input type="checkbox"/>	Providing IT support
<input type="checkbox"/>	Providing administrative support
<input type="checkbox"/>	Other - please describe below

Question 18. Are there any further comments you wish to make on any aspect of a Maritime Forum for Cornwall? If so, please describe below;

Please go to Page 25 Annex Background Information and read onto the final question

Glossary

Area of Outstanding Natural Beauty (AONB):	An area of countryside considered to have significant landscape value in England, Wales or Northern Ireland. Designated under the 1949 National Parks and Access to the Countryside Act.
Convergence:	An economic regeneration programme administered by the European Union for economically deprived areas. Convergence funding for Cornwall and the Isles of Scilly runs until 2013 and will invest in activities with a long-term impact on the economy of Cornwall and the Isles of Scilly.
Cornwall Marine Network:	An organisation dedicated to supporting the marine sector in Cornwall via initiatives that improve profitability and encourage growth through quality and innovation.
Environment:	The surroundings or conditions in which a person, animal, or plant lives or operates (Oxford Dictionary, 2010).
Green Cornwall:	A scheme led by Cornwall Council which looks at ways in which the Council can reduce its impact on the environment and become a leader in its use of renewable energy and environmentally-friendly transport.
Heritage:	That which is inherited from the past and includes 'natural heritage' which is the inheritance of fauna and flora, geology, landform and other natural resources, and 'cultural heritage' which is the legacy of physical remains of buildings, artefacts and landscapes as well the more intangible practices and expressions of a group or society.
Historic environment:	All aspects of the environment resulting from the interaction between people and places through time, whether visible, buried or submerged, and landscaped and planted or managed flora (PPS5, CLG 2010).
Inshore:	The waters off the coast up to a 12 nautical mile limit.
Local Development Framework:	The Local Development Framework or 'LDF' is the term used to describe the set of documents which will eventually include all of a planning authority's Local Development Documents. The aim of this suite of documents is to guide development in the Local Authority's area.
Local Enterprise Partnerships (LEPs)	Locally-owned partnerships between local authorities and businesses. LEPs aim to play a central role in determining local economic priorities and undertaking activities to drive economic growth and the creation of local jobs.
Local Transport Plan:	Sets out a Council's transport strategy and policies for maintaining and improving all aspects of the area's transport system.
Natural Assets:	Natural assets are assets of the natural environment. These consist of biological assets (produced or wild), land and water areas with their ecosystems, subsoil assets and air (OECD, 2010).

Marine:	Relating to or found in the sea (Oxford Dictionary, 2010).
Marine and Coastal Access Act (2009):	UK legislation that aims to ensure clean healthy, safe, productive and biologically diverse oceans and seas, by putting in place better systems for delivering sustainable development of marine and coastal environment.
Marine Conservation Zones:	Enacted through the Marine and Coastal Access Act (2009), MCZs protect nationally important marine wildlife, habitats, geology and geomorphology.
Marine Policy Statement (2010):	The overarching policy framework for the UK marine area. It provides the high level policy context within which Marine Plans will be developed, and sets the direction for marine licensing and other relevant authorisation systems.
Marine Protected Areas:	Protected areas whose boundaries include some area of ocean. In the UK, MPAs are set up primarily for the conservation of marine biodiversity and to protect species and habitats of international or national importance.
Marine Management Organisation (MMO):	An organisation established to make a significant contribution to sustainable development in the marine area and to promote the UK Government's vision for clean, healthy, safe, productive and biologically diverse oceans and seas.
Maritime:	Bordering on the sea; connected with the sea, especially in relation to seaborne trade or naval matters (Oxford Dictionary, 2010).
Natural Environment:	The ecological units that function as natural systems including landscapes, flora and fauna, freshwater and marine environments, geology and soils (Natural England 2008). The natural environment is concerned with biodiversity and geodiversity.
Seascape:	There is no legal definition for seascape in the UK. The European Landscape Convention (ELC) defines landscape as "an area, as perceived by people, whose character is the result of the action and interaction of natural and/or human factors". The draft Marine Policy Statement states that, in the context of that document, references to seascape should be taken as meaning landscapes with views of the coast or seas (Marine Policy Statement, 2010).
Shoreline Management Plan (SMP):	A Shoreline Management Plan (SMP) is a large-scale assessment of the risks associated with coastal processes and which helps reduce these risks to people and the developed, historic and natural environments.



A future for Maritime Cornwall: The draft Cornwall Maritime Strategy

Proposed consultation draft **Annex: Background information**

Contents:

1. The marine and coastal natural environment
2. The marine and coastal culture and historic environment
3. Maritime economy and regeneration
4. Climate change
5. Renewable energy and resource industries
6. Maritime tourism and recreation
7. Maritime transport
8. Fisheries and aquaculture
9. Communities and education

8 September 2011

Enfusion and Jim Claydon
for Cornwall Council

1 The Marine and Coastal Natural Environment

- 1.1** Cornwall lies on a long peninsula with no inland area more than 20 miles from the sea. It has a coastline of over 400 miles with 158 miles designated as Heritage Coast²². The inherent quality and beauty of Cornwall's marine and coastal environment has consistently attracted visitors, and much of its industry (for example fishing and tourism) is reliant on the continued health of this environment (see also sections on Maritime Tourism and Recreation and Fisheries & Aquaculture)²³. This section focuses on the natural environment (heritage assets are discussed in the Culture and Heritage section).²⁴
- 1.2** Cornwall's coastline is composed of an extensive range of natural features, including granite cliffs, small rocky coves and headlands, sand dunes and sandy beaches²⁵. The north and south coasts of Cornwall have differing characteristics. The north coast is flanked by the Atlantic Ocean, and is exposed to the prevailing south-westerly to north-westerly winds associated with low-pressure weather systems which move in from the Atlantic. As a result it has a wilder nature, with rugged sheer cliffs, steep valleys and a greater number of dunes. The south coast, on the English Channel, contains more sheltered beaches and tree-lined estuaries²⁶. Of the twelve separate areas that make up the Cornwall Area of Outstanding Natural Beauty (AONB), ten cover sections of the Cornish coastline (landscape and seascape), including the Fal, Helford, Fowey and Camel Estuaries²⁷. The Tamar is also an AONB in its own right.
- 1.3** The coast and seas of Cornwall host a wide range of biodiversity with habitats including estuaries, rocky shores and reefs, mudflats, dunes, sub-tidal sand banks, maerl beds, eel grass beds and kelp forest. Many species found in Cornish waters are at the edge of their southerly or northerly range. The Cornwall Biodiversity Action Plan (BAP) aims to protect these key marine environments and specific species with action plans for corals, molluscs, fish and their coastal habitats²⁸. There are 87 marine BAP species (crustaceans, mammals, fish, molluscs, cnidarians, algae, etc) within the coastal waters of Cornwall and the Isles of Scilly²⁹. Cornwall also has a rich marine wildlife, which includes basking sharks, dolphins and rare corals.

²² A Heritage Coast is an area of UK coast designated by Natural England. Designation aims to conserve the natural beauty of the landscape, ensure the environmental health of inshore waters, improve accessibility and support sustainable socio-economic development.

²³ The valuation of ecosystem goods and services is an approach being promoted by the UK Government that seeks to recognise the value of environmental goods and services. Further information is available at www.defra.gov.uk

²⁴ It is noted that the distinction between the natural and historic environment is not clear, due to embedded historic elements in the environment.

²⁵ Cornwall Council (2010). Cornwall LDF Core Strategy, Draft Topic Based Issues Paper: Coast and Maritime.

²⁶ Cornwall Council (2010). Cornwall LDF Core Strategy, Draft Topic Based Issues Paper: Coast and Maritime.

²⁷ Cornwall Area of Outstanding Natural Beauty. <http://www.cornwall-aonb.gov.uk/> (accessed 25,8,10).

²⁸ Cornwall Biodiversity Initiative (2004) Cornwall Biodiversity Action Plan, Volume 3, Action Plans 2004. <http://www.cornwallwildlifetrust.org.uk/>

²⁹ Cornwall Council for CISCAG (Cornwall and Isles of Scilly Coastal Advisory Group) (2009) Cornwall and Isles of Scilly SMP2, Strategic Environmental Assessment (SEA) Scoping Report.

- 1.4** Cornwall's valued biodiversity is recognised by European statutory designations, covering a range of coastal and maritime habitats including heaths, woodlands, bogs, estuaries, mudflats, salt marshes, coastal dunes, sand beaches, sea cliffs and islets. Eleven of these designations include a marine or coastal component, for example the newly designated Lizard Point Candidate Special Area of Conservation (cSAC) and long-standing Fal and Helford SAC. Furthermore, Cornwall has 61 Sites of Special Scientific Interest on the coast, some of which also include intertidal habitats and species.
- 1.5** Cornwall's six Voluntary Marine Conservation Areas (VMCAs) [Polzeath, St Agnes, Isles of Scilly, Helford, Fowey and Looe] provide an additional focus for coastal and marine habitat protection, public awareness and engagement. Ongoing work through the 'Finding Sanctuary' partnership project³⁰ will identify potential new Marine Conservation Zones to form part of the UK Marine Protected Area³¹ network by 2012.
- 1.6** Key pressures on the environmental (water) quality of Cornwall's estuary and coastline arise from industrial (including historic mining), agricultural and sewage pollution sources and currently only 26% of estuaries and 44% of coastal areas are assessed as being of good ecological quality³². Key pressures on the dependant maritime biodiversity include coastal squeeze, invasive species, pollution, fisheries, habitat loss, climate change and recreational pressures.
- 1.7** Management of Cornwall's coastal defenses, including natural protection such as sand dunes, is addressed through a Shoreline Management Plan (SMP). The SMP has recently been reviewed to take in to account national research on the long-term evolution of the coast³³ and the reviewed document, SMP2 will integrate the principles of Integrated Coastal Zone Management (ICZM) which are embedded in the new Marine and Coastal Access Act 2009.

³⁰ Finding Sanctuary is the first of four regional projects tasked with designing Marine Conservation Zones (MCZs) around England and recommending them to Government in June 2011 <http://www.finding-sanctuary.org/page/home.html> (accessed, 25,8, 2010).

³¹ Marine and Coastal Access Act, 2009, http://www.opsi.gov.uk/acts/acts2009/pdf/ukpga_20090023_en.pdf

³² Environment Agency (2009) River Basin Management Plan. South West River Basin District. Main Document.

³³ Cornwall and Isles of Scilly Coastal Advisory Group <http://www.ciscag.org/index.html> (accessed 1, 9, 2010).

Key trends: Marine and coastal environment

- There is increased pressure and cumulative impacts on the coastal and marine environment (e.g. coastal squeeze, pollution, fisheries, invasive species, water quality). Development & population pressures associated with infrastructure, housing, port activities and increased accessibility, in particular through recreation/ tourism are particularly concentrated at the coast.
- Loss and fragmentation of biodiversity (habitats and species) including from sea level rise and warming of seas due to climate change
- The Marine Protected Area network and an increasing focus on the strategic management of marine activities may help reduce the rate of biodiversity losses in the maritime area.

Key Issues

- Continued decline in marine and coastal biodiversity, including commercially important species with adverse economic effects (e.g. on tourism, maritime industries).
- Data and information for the marine environment is improving but significant gaps remain and the evidence base for marine environmental management needs to be improved, e.g. there is a lack of information on the effects of marine activities on the environment and the effects of newly emerging industries/activities unknown.
- Increasing cumulative impacts and pressures on maritime biodiversity, heightened by the effects of climate change.
- Increasing awareness of environmental issues.

Opportunities

- The protection and enhancement of the coastal and marine environment is a key priority and should inform and influence all policy and strategy development within the County.
- Increased recognition and protection of marine biodiversity through Marine Protected Areas and Marine Conservation Zones.
- Opportunities for a more integrated management approach through the establishment of new Inshore Fisheries and Conservation Authorities.
- Integration of coastal management processes through the Marine and Coastal Access Act 2009.
- Environmental growth through habitat creation and species recovery, linking to the Shoreline Management Plan; future-proofing the maritime natural environment against the effects of climate change.
- Delivering an integrated approach to management requires partnership working and will need to combine raised awareness with consideration of potential cumulative effects.
- A productive healthy environment will support diverse recreation for residents and visitors and support maritime industry, particularly tourism and fishing.

2 The Marine and Coastal Culture and Historic Environment

- 2.1** Cornwall has a rich marine and coastal heritage that has contributed to the strong sense of place and maritime cultural identity amongst Cornish communities³⁴. Cornwall's extensive and indented coastline of coves, estuaries and creeks, accessible between hard and exposed headlands has been the base for maritime activity for millennia while historically its geographic position has placed it at the forefront of the nation's communications and military strategies. Fishing, coastal trade, small-scale shipbuilding, communications and military defense have all helped to shape a distinctive Cornish marine and maritime historic environment extending from the coast, through the inter-tidal zone out to inshore and offshore waters. Fishing and shipping industries have played a key role in Cornish culture and the traditional coastal communities that developed are now the mainstay of today's Cornish tourism industry. Increasingly tourism and recreation are drawing from and influence marine and maritime heritage assets.
- 2.2** Cornwall's historic environment is recognised internationally and includes one of England's 17 listed World Heritage Sites (WHS)³⁵. The Cornish mining heritage comprises the most authentic and historically significant surviving components of the Cornwall and West Devon WHS mining landscape for the period 1700 to 1914. This extraordinary legacy of pioneering metal mining contributes a striking aspect of Cornwall's historic landscape and seascape³⁶. Although most of these mining landscapes are inland, they share a common identity and several are in coastal locations, reflecting the importance of industrial maritime trade, and include the Port of Hayle, the St Just and St Agnes Mining Districts and Charlestown Harbor³⁷.
- 2.3** There are thousands of recorded shipwrecks located off the coast of Cornwall, seven of these wrecks are statutorily protected³⁸. Two further wrecks are WWI submarines and are Protected Military War Graves. Over 100 Scheduled Monuments ranging from Bronze Age barrows to WWII gun batteries and over 2500 Listed Buildings, including well preserved harbours, docks, quays and fish cellars, lighthouses and coastguard stations dot the coastline. Over a third of the 145 conservation areas in Cornwall are coastal towns and villages, and 15 Registered Parks and Gardens shelter directly along the south coast³⁹.
- 2.4** Marine archaeology is also important and there are over 50 known inter-tidal and inshore sites of palaeo-environmental deposits. These include the remains of submerged forests that provide evidence for the early prehistoric environments of Cornwall and demonstrate how climate change has contributed to sea-level rise in the past.

³⁴ Cornwall Council (2009). Design Statement for Cornwall, 2009.

³⁵ Department for Culture Media and Sport. <http://www.culture.gov.uk/ukwhportal/>

³⁶ <http://swo-portal.limehouse.co.uk/portal/sote/soe2010>

³⁷ Cornwall Council for CISCAG (Cornwall and Isles of Scilly Coastal Advisory Group) (2009) Cornwall and Isles of Scilly SMP2, Strategic Environmental Assessment (SEA) Scoping Report.

³⁸ English Heritage, Protected Wreck Sites (<http://www.english-heritage.org.uk/professional/advice/our-planning-role/consent/protected-wreck-sites/>)

³⁹ Information about marine heritage assets is available from the Cornwall & Scilly Historic Environment Record, Historic Environment, Cornwall Council (<http://www.cornwall.gov.uk/default.aspx?page=8528>)

- 2.5** Cornwall has a rich arts heritage built on its dramatic maritime landscapes and light. The Tate at St Ives provides a contemporary backdrop for Cornish arts and is an example of how the area's historic built environment continues to be enriched with internationally and nationally significant high profile examples of good and innovative design. Other notable examples include the National Maritime Museum Cornwall. The historic environment is a valued and finite resource that creates distinctive places that attract visitors and inward investment⁴⁰. Unique to Cornwall, for example, is the Minack Theatre, carved out of rock on the cliff face near Land's End.
- 2.6** Many of the key challenges for managing the marine historic environment are understood⁴¹ and being dealt with but there is still more to do, particularly with reduced funding for English Heritage and the Heritage Lottery Fund. The 2010 State of the Environment Report for the South West recognises that there is limited information about our marine and coastal historic environment making it difficult to assess significance, identify pressures and avert threats.

Key trends: The Marine and Coastal culture and historic environment

- Climate change is predicted to increase tidal flood risk, sea level rise and coastal erosion with potential risk to coastal, maritime and marine heritage assets.
- The marine and coastal historic environment will continue to be an important part of Cornwall's cultural identity and sense of place.
- The marine and coastal culture and historic environment will continue to contribute towards tourism and inward investment.

⁴⁰ South West Observatory. State of the Environment 2010 <http://swo-portal.limehouse.co.uk/portal/sote/soe2010>

⁴¹ International guidance includes the *UNESCO Convention on the Protection of the Underwater Cultural Heritage (2001)*, the *European Convention on the Protection of Archaeological Heritage (Valetta Convention) 1992* and the *European Landscape Convention (2007)* which importantly extends cultural landscapes to the marine environment. Similarly in the UK the *The National Heritage Act (2002)* and *Marine and Coastal Access Act (2009)* alongside English Heritage guidance such as *Taking to the Water (2002)* and *Climate Change and the Historic Environment (2008)* are important drivers for the better understanding and management of the marine historic environment.

Issues

- Information about the marine historic environment is limited with particular biases in coverage and subject. To redress this imbalance the Historic Environment Record (HER) for Cornwall & Scilly requires enhancement in order to better document inter-tidal and inshore archaeology, historic sites and wrecks.
- The available information and evidence is largely specific and site based and therefore patchy. Recent programmes such as English Heritage's 'England's Historic Seascapes' are meeting this gap through the development of area-based historic character assessments e.g. Historic Seascape Characterisation (HSC)⁴².
- Resources are required to undertake historic environment assessments, surveys and recording exercises to encourage the appropriate management of marine and coastal heritage assets. Similarly best practice for dealing with archaeological remains recovered from the seabed during aggregate dredging, fishing or diving activities need to be developed and implemented⁴³.
- Marine and maritime heritage assets are susceptible to the impacts of climate change, for example sea-level rise, so suitable policies and strategies are required in order to identify the assets at risk.
- Susceptible to cumulative effects of development and industry

Opportunities

- Recognising the importance of the marine historic environment in marine planning.
- Ensuring that historic environment policy is firmly embedded in marine planning policy and terrestrial planning for coastal areas.
- Encouraging further marine archaeology research and sharing of information and data with partners.
- Opportunities for the historic environment to make a contribution to the revitalisation of coastal economies and communities.
- Improve the cultural offer to the Cornish population and visitors through greater coordination and promotion of Cornwall's maritime festivals and events.

⁴² English Heritage's 'England's Historic Seascapes' programme (<http://www.english-heritage.org.uk/professional/research/landscapes-and-areas/characterisation/historic-seascape-character/>)

⁴³ Joint Nautical Archaeology Policy Committee (JNAPC) provides various guidance and codes for practice concerning the treatment of artefacts, finds recovered from the seabed (<http://www.jnapc.org.uk/index.htm>). See also BMAPA and EH protocols for reporting finds of archaeological interest in partnership with industry: (<http://www.wessexarch.co.uk/projects/marine/bmapa/index.html>)

3 Maritime Economy and Regeneration

- 3.1** Population density in Cornwall is low and is concentrated in the coastal and estuarine areas providing a direct relationship between this maritime setting and the nature and type of economic activity in the region. Cornwall's economic base is dominated by the public administration, education, health and retail sectors which together account for nearly 50% of economic output in the area⁴⁴. The area also has a distinctive micro business economy with over two thirds of businesses employing four or less people, a figure that is reflected in marine businesses where 64% employ less than 10 people.
- 3.2** In this context Cornwall's maritime industries play a key role in the economic stability and potential future growth of the area. Industries with a direct and significant relationship with the sea include: ports, harbours and fishing (commercial and recreational); tourism and recreation; and the growing renewables/environmental technology sectors (see also the Renewable Energy and Fishing and Aquaculture sections). Boat-building and ship repair are of growing importance to Cornwall's Economy. Focused in Falmouth, this industry features some of the UK's leading shipbuilding and repair companies, including A&P Falmouth and Pendennis.
- 3.3** Recent analysis⁴⁵ has indicated that the marine sector in Cornwall directly or indirectly employs around 14,000 people, accounting for approx 1 in 7 marine jobs in the UK⁴⁶. Of this figure almost 3,000 are located around Falmouth where 42% of Cornish marine businesses are located. In addition to Falmouth, other ports around the coast provide a focus for industry (e.g. Fowey Harbour) and the diverse fishing industry, which has traditionally been a mainstay of the Cornish maritime economy. Newlyn, in particular, serves as a major fishing port and ranks in the UK's top ten ports for the quantity (8.2 thousand tonnes) and value (£15.7M) of fish landed⁴⁷. Recreational fishing is also growing in its economic importance (see also section on Fisheries and Aquaculture).
- 3.4** Maritime tourism continues to be a key economic input to Cornwall's maritime industry base. One source suggests that over 8,000 marina berths around the coastline are occupied and up to 45,000 visiting yacht nights are spent per year⁴⁸. A wide range of activities that use the sea including sports such as surfing, sailing, diving, kayaking, coastering, wind & kite surfing and water skiing also contribute to the overall revenue derived from maritime tourism in the area. Of these, surfing and sailing contribute half of the turnover to the Cornwall marine leisure industry.⁴⁹

⁴⁴ Cornwall Council (2010). Cornwall LFD Core Strategy Draft Topic Based Issues Paper: Economy.

⁴⁵ Ivall, S (2007) 'Cornwall's maritime industry creates 3,000 job'. Boating Cornwall. Newsquest Media Group

⁴⁶ British Ports Association, South West Regional Ports Association (2009). South West Ports 'Gateways for Growth. South West Regional Ports Association.

⁴⁷ Marine and Fisheries Agency (2009) United Kingdom Sea Fisheries Statistics 2008. National Statistics/ Defra, 2009. South West Regional Ports Association.

⁴⁸ Ivall, S (2007) 'Cornwall's maritime industry creates 3,000 job'. Boating Cornwall. Newsquest Media Group

⁴⁹ Observatory of the Cornwall Marine Leisure Industry Draft in preparation 2010. Nautisme Espace Atlantique Project, Cornwall Development Company.

- 3.5** Regeneration focused on the marine sector in Cornwall has been enhanced by the recent confirmation that Government will invest over £5M into the Hayle marine energy business park (see also Renewable Energy) as part of a move to invest in marine energy projects in the South West following its designation as the UK's first Low Carbon Economic Area⁵⁰. Additionally there are ongoing opportunities for coastal regeneration through established facilities such as the National Maritime Museum Cornwall, alongside new waterfront developments e.g. the planned new marina development in Falmouth⁵¹, Par Docks development and the Hayle Harbour regeneration scheme. This trend for new waterside developments combining industry and leisure outputs offers significant future opportunities.
- 3.6** The maritime area also influences and is influenced by wider industry in Cornwall, for example Cornwall's ports are essential to resource industries through facilitating the export of china clay, aggregates and timber⁵². Coastal agriculture and food production are also important to the local economy; in this industry there is a growing emphasis on artisanal and niche products, including Cornish branded products, especially in the dairy sector.
- 3.7** Overall it is estimated that Cornwall's marine industry sector contributes more than £130M to the GDP of Cornwall, and that the development potential of the sector will be critical to the region's future and long term prosperity⁵³. Organisations including the South West Regional Ports Association and Cornwall Marine Network work are working to support existing business and promote further economic growth.

Key trends: Maritime Economy and Regeneration

- Growth in regional and national level investments to support new/emerging maritime technologies, including renewables.
- Developing marine industry sector with recognised specialist skills and expertise.
- Growing popularity of niche business, e.g. sustainable tourism, artisanal food products.
- Continuing popularity of Cornwall as a destination for maritime leisure activities.
- Industry and leisure interests targeting waterside development opportunities.

⁵⁰ South West Regional Development Agency (March 31, 2010). 'Government confirms £5M investment towards delivery of marine energy business park'. http://www.southwestrda.org.uk/news_and_events/2010/march/%C2%A35m_marine_energy_investment.asp (accessed, 12,1,11).

⁵¹ South West Business (26, 8, 2010). 'Final hurdle overcome as 290-berth Falmouth dock marina is approved'. <http://www.southwestbusiness.co.uk/homepagetest/Final-hurdle-overcome-290-berth-dock-marina/article-2566706-detail/article.html> (accessed 31, 8, 2010).

⁵² It is also noted that there is an opportunity to build upon existing mineral export facilities at the Port of Fowey to provide for the expansion of secondary aggregate exports.

⁵³ Cornwall Marine Network. <http://www.cornwallmarine.net/> (accessed 27,8,10).

Issues

- Infrastructure deficiencies particularly transport routes.
- Conflicts between economic development and environmental impact/community concerns.
- Conflicts between different economic uses, e.g. recreational vs industrial uses of ports.
- Business would prefer less regulation and more certainty from government.

Opportunities

- To better engage business in strategy development and maritime planning and management.
- Opportunities to build on existing economic strengths in industries such as fishing and harbours, ports and tourism.
- The renewables industry and low-carbon Cornwall agenda provide opportunities to become a centre of excellence for marine technologies and renewable energy.
- Opportunities to develop niche industries: eco-tourism, adventure tourism and agricultural produce.
- Continued demand for waterside living and leisure provides opportunities for regeneration.

4 Climate Change

- 4.1** Cornwall's maritime setting ensures that the sea has a significant influence on the weather patterns and overall climate of the County. Cornwall benefits from the Gulf Stream, ensuring that in winter temperatures rarely fall below zero degrees Celsius. Regular processions of weather fronts from the west provide rain all year round, although in the summer they are typically weaker allowing for an average of 7 hours sunshine per day during the summer (May-July) months.
- 4.2** Climate change will play a major role in shaping the future of Cornwall. Predictions for rising mean temperatures and sea levels indicate that the largely coastal population and the landscape and biodiversity interest of Cornwall, is likely to be increasingly affected by the local impacts of global scale climate change.
- 4.3** In line with predictions for Southern England, climate change in Cornwall is expected to result in wetter, stormier winters and drier, hotter summers, with extreme weather events such as droughts and heatwaves becoming more common. Cornwall has short and fast responding river catchments and it has been predicted that the increase in rainfall could lead to an increase in major flood events, similar to the Boscastle flood in 2004⁵⁴ and more recently flooding in north and east Cornwall in late 2010. Such events can cause significant damage to homes, businesses and infrastructure.
- 4.4** In the South West region, annual average, daily mean, temperatures have increased by 1.37°C between 1961 and 2006. Annual average temperatures in Cornwall and the South West are predicted to increase by 0.5 - 1.0 °C by the year 2020, 1.0 - 1.5 °C by the year 2050 and 1.5 - 2.0 °C by the year 2080. This could lead to more visitors taking advantage of the warmer weather. However it may also lead to further incidences of heatstroke and sunstroke for beach-goers, increased heat related deaths among the elderly and a strain on water resources.
- 4.5** Estimates suggest that net sea level rise in the South West could be between 20 and 80 cm by the 2080s⁵⁵. The sea level in Newlyn, a location with one of the five longest sea level records in the UK, has risen by approximately 20 cm since 1920⁵⁶. It has been suggested that a sea level rise of 20 cm by 2030 would compromise freshwater habitats, sea defences and increase the frequency of coastal flood events⁵⁷, and due to the often steep coastal topography, managed retreat is not always an option. Rising sea levels can lead to unpredictable coastal dynamics, which may increase coastal erosion and damage coastal amenities which will be vulnerable to surge and sea level rises⁵⁸.

⁵⁴ Cornwall Council (2010). Cornwall Local Development Framework (LDF), Core Strategy; Draft Topic Based Issues Paper, Climate Change Draft.

⁵⁵ UK Climate Impacts Programme (UKCIP) <http://www.ukcip.org.uk/> (accessed 31, 8, 2010).

⁵⁶ South West Observatory. <http://www.swenvo.org.uk/> (accessed 26,8,10)

⁵⁷ Cornwall Council for CISCAG (Cornwall and Isles of Scilly Coastal Advisory Group) (2009) Cornwall and Isles of Scilly SMP2, Strategic Environmental Assessment (SEA) Scoping Report.

⁵⁸ Cornwall Council for CISCAG (Cornwall and Isles of Scilly Coastal Advisory Group) (2009) Cornwall and Isles of Scilly SMP2, SEA Scoping Report.

- 4.6** Climate change has already been identified as having an impact on the waters surrounding the UK, with some fish distributions moving northwards over the past 30 years by distances of up to 250 miles, as sea surface temperatures rise⁵⁹. It has also been noted that climate change has contributed to a decrease in approximately 9% in the total number of sea birds breeding in the UK between 2000 and 2008. In the waters surrounding Cornwall there is evidence of an increase in warm water species and overall changes to species composition, including the survival of introduced species as a result of increased temperatures⁶⁰. Ocean acidification may also lead to impacts on calcifying organisms, including corals and shellfish, with implications for the fishing industry.
- 4.7** Predicted climate changes also pose potential issues for Cornwall's transport network which provides vital links for the largely rural population, situated in peripheral locations with a heavy dependence on private transport. Sea level rise and extreme tidal events may threaten 9-13 miles of Cornwall's local road network as well as strategic rail links, and road links (M5 south of Bristol) which are also threatened by tidal and fluvial flooding in the longer term.⁶¹ These vulnerabilities have implications for accessibility to services and potentially wider economic impacts through disruptions to trade and tourism.
- 4.8** Whilst Cornwall will suffer from the negative effects of climate change, it is also a contributor to the cause of climate change; greenhouse gases. CO₂ emissions are in line with the South West average and are slightly below the average for the UK. In 2005 the total amount of CO₂ produced in Cornwall was 4,380,000 tonnes of which 32% of CO₂ emissions arose from transport, 35% from industrial activity, 29% from housing and 4% from land use (e.g. agriculture). By 2006 this had dropped to 4,284,000 tonnes⁶². This equates to 8.1 tonnes per person in Cornwall, compared to the UK average of 8.8 tonnes⁶³.

Key trends: Climate Change

- Climate change in Cornwall is expected to result in wetter, stormier winters and drier, hotter summers, with extreme weather events such as storms becoming more common.
- Estimates suggest that net sea level rise in the South West could be between 20 and 80 cm by the 2080s, with increased incidences of coastal flooding and coastal squeeze⁶⁴.

⁵⁹ Marine Climate Change Impacts Partnership (2010): Marine Climate Change Impacts: Annual Report Card 2010-2011.

⁶⁰ Marine Climate Change Impacts Partnership (2010): Marine Climate Change Impacts: Annual Report Card 2010-2011.

⁶¹ Cornwall Council (2010). Cornwall LDF, Core Strategy; Draft Topic Based Issues Paper. Transport and Accessibility.

⁶² Cornwall Council (2010). Cornwall LDF Core Strategy Draft Topic Based Issues Paper, Climate Change.

⁶³ Cornwall Council (2010). Cornwall LDF, Core Strategy; Draft Topic Based Issues Paper, Climate Change.

⁶⁴ Coastal Squeeze occurs when areas of land (e.g. mudflats and saltmarshes) are trapped between rising sea-levels and sea defences. This can lead to habitat loss.

Issues

- Extreme weather events are likely to lead to increased incidences of flooding.
- Sea level rise will compromise flood defences and habitats, and heritage assets, and Cornwall's steep topography results in few opportunities for managed retreat of the coastline.
- Whilst below the UK average, Cornwall's population produces a significant volume of CO₂ emissions, contributing to climate change.
- Changes in marine productivity will have a significant effect on biodiversity and dependent industries, especially fisheries for example through shifts in commercially important species distributions, particularly those already at the edge of their range.
- Whilst climate science is improving there remains uncertainty and poor understanding with regard to the marine area e.g. contributions of marine activities to CO₂ emissions are unquantified; the role of the marine environment in regulating the climate is poorly understood; impacts on the maritime sector are uncertain.
- There is a need for a stronger focus on climate change adaptation for future plans.

Opportunities

- To shape settlements to adapt to climate change through the planning process.
- A warmer climate may extend the tourist season and could encourage more visitors from the UK and other parts of Europe.
- Opportunities to reduce greenhouse gas emissions through encouraging low-carbon transport of goods and people (e.g. freight and water-based transport) and controls in licensing and planning.
- Cornwall is in a good position, with its extensive wind and wave resource, to develop effective low carbon alternatives of energy production.

5 Renewable Energy and Resource Industries

- 5.1** As the home of the UK's first commercial wind farm, Cornwall has established a leading position in the installation, transmission and use of renewable energy. Opportunities for marine based renewables, in particular, wave, tidal and off-shore wind power, are significant given the prevailing south westerly winds that sweep across the Atlantic ocean to the coast providing reliable swell conditions and large tidal ranges.
- 5.2** Cornwall is now the site of the world's most advanced testing for wave energy following the installation in 2010 of the Wave Hub, a 'publicly funded offshore infrastructure facility'⁶⁵ situated approximately 10 miles off the Cornish coast offering developers a consented, grid connected area of the sea, that in the future will be capable of delivering up to 50MW of power. The onshore sub-station for this facility at Hayle, will also form part of a new £12.8M marine energy business park promoting opportunities for wave and tidal power developments in the region. Current estimates suggest that up to 1,000 jobs and £332M revenue may be generated in the South West through the Wave Hub technologies.⁶⁶
- 5.3** Cornwall's existing on-shore wind farm industry expertise is also well placed to serve two off-shore wind farm sites; the 'Atlantic Array', proposed for the Bristol Channel and a site at Lyme Bay off the coast of Devon. Invest Cornwall notes that opportunities exist for deep water foundation technologies, tooling, materials, operations and maintenance services. The South West Regional Development Agency (2010) expects investment in regional marine energy projects around the coast of Cornwall to reach £100m over the next two years⁶⁷
⁶⁸.
- 5.4** Quarrying and mining for minerals and metals have played a key role in shaping Cornwall's historic and natural environment, from the hydraulic mining processes used for China clay extraction in the St Austell area to the tin, copper and minerals workings that have included developments at coastal locations (e.g. St Just and St Agnes which form part of the Cornish Mining World Heritage site). The port of Fowey in particular plays a key role in the transportation of these resources, handling in the region of 1.35million tonnes of china clay per annum⁶⁹.

⁶⁵ <http://www.investincornwall.com/uploads/files/Wave-Hub-summary.pdf> (accessed 25/8/10)

⁶⁶ New Civil Engineer (2010, July 27) Editorial. 'Wave energy test equipment sets sail for Cornwall'

⁶⁷ <http://www.investincornwall.com/> (accessed 25/8/10)

⁶⁸ South West Regional Observatory (2010). State of the Environment; South West, 2010.

⁶⁹ Cornwall Council (2006) Cornwall's Second Local Transport Plan (LTP2) 2006-2011. LTP2 Supporting Strategic Document: Freight Strategy <http://www.cornwall.gov.uk/default.aspx?page=4599> (accessed 31, 8, 2010).

5.5 Granite and other igneous rocks (for aggregates and building stones), china clay, slate and sandstone, continues to be extracted from quarries, some at coastal sites⁷⁰. There is potential to significantly increase the volumes of secondary aggregates (derived from china clay waste) currently exported from Fowey and Plymouth Ports and for the greater use of ports for exporting bulky minerals. Mining and related activities are, therefore, likely to play an ongoing role in influencing the Cornish coastal landscape and seascape for the foreseeable future.

Key trends: Renewable Energy and Resource Industries

- Cornwall will continue to be a focus for marine energy projects and research and development due to its wave, tidal and wind conditions and the strength of the existing industry.
- Continued inward EU and UK investment in Cornwall for marine energy linked to strategic UK renewable targets.
- Active mining, minerals extraction and quarrying industries will continue to shape Cornwall's landscape and seascapes.

Issues

- Appropriate sites for renewables and associated on-land facilities need to be secured through a clear process.
- Developers and investors need long-term certainty with regard to planning and development conditions.
- Uncertainty over the compatibility of marine renewables with Marine Protected Areas.
- Due to its peripheral location and sparser population, Cornwall's is reliant on carbon-based fuels; its coastal economy is therefore vulnerable to changes in costs and availability of this resource.
- The development and generation of offshore renewable energy has the potential for adverse effects on coastal and marine landscape and seascape character and ecology.

Opportunities

- Cornwall has the opportunity to build on its existing expertise and renown to be considered a world leader in marine renewable energies.
- Cornwall has the opportunity to reduce its contribution to greenhouse gas emissions.

⁷⁰ Cornwall Council Minerals and Waste Policy available at: <http://www.cornwall.gov.uk/default.aspx?page=15721> (accessed 25/8/10). This will be superseded by a Minerals Development Document being produced as part of the emerging Cornwall Local Development Framework.

6 Maritime Tourism and Recreation

- 6.1** Cornwall's maritime setting and history provides a consistent draw for visitors who travel to the area to experience its unique coastal setting and cultural attractions. Residents and visitors alike are also attracted to the quality marine recreational and sporting opportunities on offer and there is a rich heritage associated with popular activities such as local rowing clubs and the Surf Life Saving Association. Marine leisure is worth an estimated £295 million to the Cornish economy, with sailing and surfing accounting for half of the turnover in the sector.⁷¹
- 6.2** Tourism plays a significant role in the Cornish economy accounting for 22% of the area's total employment; double that of the neighbouring county, Devon⁷². Cornwall's tourism industry is heavily reliant on its natural and cultural maritime environment which is characterised by its long and varied coastline of coves and dramatic cliffs, accessible sandy beaches and dunes, and traditional fishing villages and harbours.
- 6.3** The coastline and coastal settlements of Cornwall, whilst peripheral to the rest of the UK mainland, are accessible both from the sea, through a network of ports and smaller, scenic harbours and from the landside for example, via beaches and the South West Coast Path. The Coast Path draws people from across the UK and internationally and plays a significant role in the local tourism economy⁷³. Cornwall AONB and Heritage Coast also attract visitors and residents and other important recreational spaces include beaches, greens and footpaths and rights of way. The Countryside and Public Rights of Way Act (2000) and the new Marine and Coastal Access Act (2009) provide a legislative basis for further improvements to coastal access.
- 6.4** Cornwall's coastal assets support an extensive range of marine based visitor activities that include sailing, surfing, sightseeing, swimming, and a range of adventure sports for example, windsurfing, canoeing, coasteering and water skiing. A significant revenue stream is also derived from pleasure boating including yachting and cruising, that in 2008 accounted for approximately £5M of visitor spend across the Districts, including the Isles of Scilly⁷⁴.
- 6.5** Cornwall's maritime cultural heritage forms the basis of several key visitor attractions, including the National Maritime Museum Cornwall based in Falmouth⁷⁵, which serves as a focus for conservation, education, research and the promotion of Cornwall as a maritime tourism and wider business/industry destination.

⁷¹ Observatory of the Cornwall Marine Leisure Industry Draft in preparation 2010. Nautisme Espace Atlantique Project, Cornwall Development Company.

⁷² South West Tourism (2010) The Value of Tourism 2008: Cornwall.

⁷³ The South West Coastal Path is estimated to be worth more than £222m to the regional economy. www.southwestcoastpath.com

⁷⁴ South West Tourism (2010) The Value of Tourism 2008: Cornwall.

⁷⁵ National Maritime Museum Cornwall. <http://www.nmmc.co.uk/index.php>

- 6.6** All forms of tourism in Cornwall have, to date, been characterised by a distinct seasonality, with most revenue being derived during the summer months. However, evidence suggests that the season is extending around the summer months (March/April/Sept/Oct) and this may be enhanced by the predicted effects of climate change extending the duration of the summer season⁷⁶. For maritime tourism, the effects of climate change may not be universally positive. The predictions for greater weather variability and in particular an increased incidence of 'storminess' may adversely impact activities and experiences reliant on more stable sea conditions, and those susceptible to coastal changes that may occur from accelerated erosion. The National Trust's Shifting Shore initiative looks at the implications of climate change on properties it manages, including evidence based at properties in Cornwall.⁷⁷
- 6.7** Evidence suggests recreational interest in coastal areas and maritime leisure activities will continue to grow⁷⁸ and in common with other European coastal destinations, Cornwall will need to develop approaches that promote innovative, low carbon and sustainable tourism and respect for the natural environment. Current initiatives, such as those promoted by the Cornwall Sustainable Tourism Project (CoaST) offer a range of measures and opportunities relevant to maritime businesses in the region⁷⁹. Clean Cornwall week and blue flag accreditation for beaches are examples of other initiatives that have local support.

Key trends: Maritime Tourism and Recreation

- As tourism in Cornwall increases, maritime tourism continues to be a significant source of revenue and employment for Cornwall.
- Surfing is growing in popularity and as an industry with significant benefits to the Cornish economy. Other leisure activities, including adventure sports continue to grow in popularity.
- The eco-tourism industry is growing and sustainability initiatives are increasing across the industry.
- With increased tourism, further urbanisation of the coast and beaches is occurring (for example increased commercialisation, signage and lifeguard presence).
- Climate change will result in both positive and negative effects for tourism.
- Cornwall's tourism season is extending into the shoulder months (March, April, September and October).

⁷⁶ Cornwall Council (2010). Cornwall LDF Core Strategy, Draft Topic Based Issues Paper: Tourism.

⁷⁷ National Trust (2010) Shifting Shores. http://www.nationaltrust.org.uk/main/w-global/w-news/w-latest_news/w-news-shifting-shores-report/

⁷⁸ Science and Policy Integration for Coastal System Assessment. <http://www.spicosa.eu/index.htm>

⁷⁹ Cornwall Sustainable Tourism Project (CoaST). <http://www.cstn.org.uk/>

Issues

- The tourism and recreation/leisure industries in Cornwall are fragmented; better management and coordination is required especially in relation to the recreation and leisure sector.
- Conflicts occur between tourism and recreation uses and other industries (for example ports operations and aquaculture development) as well as with maritime biodiversity.
- Tourism places pressure on the marine environment-there needs to be a greater respect and appreciation for the marine and coastal environment and resource (from visitors and residents).
- Congested roads, especially during peak tourism season are a particular issue, and public transport services to Cornwall are frequently cited as slow and irregular.

Opportunities

- Further support the development of sustainable tourism.
- Attract visitors throughout the year and extend lifeguard cover for increased demand outside of peak season.
- Opportunities to support and further develop the surfing and wider adventure tourism industry, including through coordinated management and promotion and accreditation.
- Continued opportunities to support traditionally strong areas of tourism, including sailing and seaside family holidays.
- Promote and improve health and well being for local residents through water-based activities and management of beaches as public open spaces.
- Cornwall's natural and historic marine environments contribute to tourism and leisure activities whilst also improving awareness and understanding?

7 Maritime Transport

- 7.1** Cornwall's maritime setting has ensured that the County's ports and harbours have historically played a key role in the transportation of goods, services and passengers around the region's coastline and to destinations in UK waters and beyond. Maritime transportation continues to be a vital source of revenue and development opportunity for Cornwall across both the industry and leisure sectors.
- 7.2** Cornwall's coast has numerous ports and harbours catering for a range of vessel size and types that collectively make significant contributions to the Cornish economy⁸⁰. The major ports of Fowey, Falmouth, and Truro in particular are considered to be of strategic economic importance for their cargo and recreational, transportation businesses⁸¹. Fowey's deep water port provides facilities for the shipment of approx 1.35 million tonnes of china clay per annum from the St Austell clay mines. It also has the potential to expand its complementary trade exporting secondary aggregates. Truro also deals with the transport of bulk commodities (e.g. coal, stone, sand, ore concentrates, scrap metal, feeds and fertilisers) although its annual tonnage (23,072) is substantially smaller.
- 7.3** Falmouth Port provides bulk cargo transportation services; however, this key Cornish port encompasses a significantly wider range of core activities including ship repair, refitting and a full range of wharfage and technical services for commercial and leisure vessels⁸². In addition, the Port supplies services for defence transport assets, for example, the refitting of the Royal Fleet Auxiliary ship Argus (with an estimated value of £23M)⁸³, and helipad services for SeaKing helicopters operating from RNAS Culdrose. As a natural deep water harbour, Falmouth is also popular for cruise ship operators who include Falmouth in their itineraries for voyages around the UK and to the Mediterranean, Canary Islands and the Caribbean.
- 7.4** Falmouth has also recently gained approval for a 290 berth marina⁸⁴, which will contribute to Cornwall's extensive marina facilities improving accessibility and promoting recreational travel by boats and yachts around the coastline; as promoted through the partnership organisation 'Destination South West'⁸⁵ (see also Maritime Economy).

⁸⁰ British Ports Association (2010): A Blue Print for Ports Policy 2010.

http://www.britishports.org.uk/public/a_blueprint_for_ports_policy_new_bpa_document_launched

⁸¹ Cornwall Council (2006) Cornwall's Second Local Transport Plan (LTP2) 2006-2011. LTP2 Supporting Strategic Document: Freight Strategy <http://www.cornwall.gov.uk/default.aspx?page=4599> (accessed 31, 8, 2010).

⁸² www.ap-group.co.uk (accessed 31, 8, 2010)

⁸³ <http://www.mod.uk/DefenceInternet/FactSheets/DefenceInTheSouthWest.htm> (accessed, 31, 8, 2010).

⁸⁴ South West Business (26, 8, 2010). 'Final hurdle overcome as 290-berth Falmouth dock marina is approved'. <http://www.southwestbusiness.co.uk/homepagetest/Final-hurdle-overcome-290-berth-dock-marina/article-2566706-detail/article.html> (accessed 31, 8, 2010).

⁸⁵ <http://www.destinationsouthwest.co.uk/> A marketing partnership aimed at developing the south west ports as a cruising/ leisure destination.

- 7.5** Cornwall's dispersed population is served by a road network that suffers significantly from congestion, in particular during the main tourism season. Public transport services vary considerably across Cornwall with the larger towns benefiting from frequent bus and rail services to some more rural areas experiencing limited public transport access. Alongside specific industry and wider recreational interests, water based travel services provide key connections and vital services for the day-to-day lives of the Cornish population, although many of the smaller services don't run or are limited outside of the tourism season. Cornwall has eight estuarial ferry crossings that operate on a regular basis⁸⁶, for example, the Torpoint chain ferries provide regular crossings of the River Tamar for cars, and the Padstow to Rock ferry carries pedestrian traffic across the harbour. Water taxis also provide an important transport service in more populated areas, for example in and around Falmouth. The ferry links to the Isles of Scilly from the port of Penzance (the Scillonian) play a key role in the provision of goods and services alongside the transport of seasonal tourism trade. A new, larger ferry is proposed to operate between Penzance and St Marys from early 2013 that can carry freight and passengers and operate all year round; this will require a new passenger and freight terminal at Penzance Harbour.
- 7.6** While recreational travel and industry transport is the most significant activity occurring at Cornish ports, there are opportunities to promote short sea travel for wider transport needs given its lower carbon footprint⁸⁷ when compared with road based transport on which the Cornish economy currently remains heavily dependant⁸⁸.

Key trends: Maritime Transport

- Cornish ports play a key role in the transportation of imported/exported goods.
- Recreational travel and transport is a growing source of revenue and development potential for Cornish ports and harbours.
- Water based transport may play an increasing role in providing vital connections for Cornish communities and businesses, especially as oil prices rise.

⁸⁶ Cornwall Council (2010) Cornwall LDF Core Strategy: Draft Topic Based Issues Paper: Transport and Accessibility.

⁸⁷ British Ports Association, South West Regional Ports Association (2009). South West Ports; 'Gateways for Growth'.

⁸⁸ Cornwall Council (2010) Cornwall Local Development Framework: Draft Topic Based Issues Paper: Transport and Accessibility.

Issues

- Poor connectivity and public transport in rural, isolated areas; water bodies serve as a barrier to some communities.
- Limited ferry services outside main tourism season.
- Capacity issues for road/rail links to ports (e.g. narrow roads).
- Ports can adversely impact the marine and coastal environment, particularly dredging.
- Cornish ports are diverse and often compete - there is no one spokesperson or representative body.
- The economic and transport potential of ports are unrealised and their diverse role not well understood by policy makers.
- Conflicts between leisure and industrial use of ports.
- Poor public access at some waterfront sites.
- Transport networks are vulnerable to flooding, coastal erosion and sea level rise.

Opportunities

- Sustainability advantages of using more water-based transport, including for freight and opportunities to better connect coastal communities.
- Opportunities to provide better inter-modal connections, e.g. from ferry to bus services.
- Making better use of waterfront infrastructure for public transport services.
- Port development offers opportunities for economic growth; for example for waste, minerals & biomass export/import, transport of renewables components.
- Opportunities to further develop leisure role of ports, e.g. for cruise ships
- Alongside the LTP3 'Connecting Cornwall: 2030', the Maritime Strategy could further encourage healthy alternatives to the car, including walking, rowing and cycling.

8 Fisheries and Aquaculture

- 8.1** The Cornish fisheries are an essential element of the local economy with commercial and recreational fishing playing a key role in the social fabric and cultural identity of Cornwall's coastal villages, ports and harbour towns. Fishing, and more recently, managed aquaculture practices contribute to livelihoods in Cornwall on a national and small, micro business scale. Recreational angling is of increasing economic importance to Cornwall generating significant revenue, especially for the tourism industry.
- 8.2** Newlyn is Cornwall's premier fishing port and is one of the largest fishing ports in the UK. The port ranks 8th in the UK for the quantity (8.6 thousand tonnes) and value (£18.M) of fish landed⁸⁹ (see also Marine Economy and Regeneration). Over 100 vessels operate from the port ranging in size from 19ft to 120ft.⁹⁰ This diversity of fleet is characteristic of the Cornish fleet overall which consists of many small scale independent operators who target a range of species by various methods.
- 8.3** Cornish fish stocks are also diverse with a range of 40-50 commercial species fished of which approximately 25% are currently subject to quotas, although a number of these species, e.g. turbot, brill, lemon sole and squid are considered 'non pressure' stock⁹¹. The species contributing the most value to Newlyn (as landed by UK vessels) in 2010 include monks or anglers, Megrim, Pollack, crabs, cuttlefish and scallops. The overall value of landings in Newlyn for 2010 was close to £18M. Other harbours also support landings from fishing fleets on a smaller scale including Looe, Mevagissy, Newquay, Padstow, Penryn, Portreath, St Ives, St Mawes and Truro.
- 8.4** The diversity and adaptability of the Cornish fishing fleet is identified by the Cornish Fish Producers Association (CFPO) as a characteristic that supports a sustainable, long term approach to fishing and fisheries management⁹². For example, the Cornish sardine which is fished by 26 vessels using a combination of ring and drift nets has been certified (Oct 2009, July 2010) as sustainable by the Marine Stewardship Council (MSC).
- 8.5** Sustainable fishing practices are also being cultivated in Cornwall on a smaller scale using traditional low impacts methods. Handline fishing, which targets single species, is undertaken by individual fishermen in around 150 boats in the Cornwall and Devon waters⁹³. This mackerel fishery is MSC certified, commanding a premium price when bought by suppliers operating an MSC chain of custody to demonstrate their sustainable seafood sourcing⁹⁴.

⁸⁹ Marine Management Organisation & National Statistics (2011) The UK Fishing Industry in 2010-Landings

⁹⁰ South West Regional Ports Association.

⁹¹ Vaughan C. (2009) 'Does the Cornish Fishing Industry have a future?' Cornish World Magazine.

⁹² Cornish Fish Producers Organisation (CFPO) represents 80% of the Cornish fleet over 10m. <http://www.cfpo.org.uk/>

⁹³ South West Handline Fishermen Association. <http://www.linecaught.org.uk/>

⁹⁴ Marine Stewardship Council (2009) Net Benefits. The first ten years of MSC certified sustainable fisheries. www.msc.org

- 8.6** Cornwall's sheltered bays and estuaries provide ideal environments for farming a range of species, with shellfish dominating the Cornish aquaculture industry. The oldest and most established farm is the Duchy of Cornwall Oyster Farm situated on the Helford River in South West Cornwall. In line with the sustainable practices emerging in the Cornish sea fisheries industry, the Duchy Farm is one of the few oyster farms in the UK with official organic accreditation from the Soil Association⁹⁵. St Austell Bay, the Fal, Helford and Fowey Estuaries are the main sites of a growing Cornish mussel industry. On the North Cornish coast the National Lobster Hatchery in Padstow is also promoting a sustainable approach to harvesting, releasing young lobsters raised in the hatchery around the coastline to restock and support the lobster population⁹⁶.
- 8.7** The development of sustainable fisheries is a key trend for the diverse Cornish fishing industry and this long term approach to fishing will be increasingly important given the worldwide decline in fish stocks and the predicted effects of climate change that will impact the area's fisheries, e.g. higher tides, warming oceans and the associated migration of species and changes to the composition of the overall food chain. These changes represent key challenges for the industry and are coupled with new policy developments aimed at extending the protection afforded to marine areas through Marine Conservation Zones (MCZs)⁹⁷. Two new candidate Marine Protected Areas have been submitted to the European Union: Lizard Point and Cape Bank and Lands End Candidate SACs. These new policy developments will require the fishing industry to work in closer partnership with conservation organisations (see also Marine Environment and Conservation) to manage any potential conflicts.
- 8.8** Recreational angling is an important part of the fishing industry in Cornwall, generating significant indirect benefits to the economy from tourism revenue. A DEFRA funded report found that close to 250,000 residents in the South West participate in sea angling, and when added with visiting anglers, total recreational sea angling expenditure in the South West is estimated at £165 million⁹⁸, supporting 3000 jobs across the region.

⁹⁵ The Duchy of Cornwall Oyster Farm <http://www.thewrightbrothers.co.uk/duchyfarm/>

⁹⁶ The National Lobster Hatchery <http://www.nationallobsterhatchery.co.uk/>

⁹⁷ Finding Sanctuary is the first of four regional projects tasked with designing Marine Conservation Zones (MCZs) around England and recommending them to Government in June 2011. <http://www.finding-sanctuary.org/page/home.html> (accessed, 25, 8, 2010).

⁹⁸ Email comm. Cornish Federation of Sea Anglers. Quoting report: Nautilus Consultants (2005). The Motivation, Demographics and Views of South West Recreational Sea Anglers and their Socio-economic Impact on the Region.

Key trends: Fisheries and Aquaculture

- Established fishing industry, historically diverse and characterised by micro businesses.
- Growth of sustainable and artisanal fishing practices, provides environmental, economic and cultural opportunities for the Cornish fishing industry.
- Worldwide decline in fish stocks and diversity, partly due to damaging fishing practices.
- Increasing climate change and conservation/ management pressures on fishing and aquaculture industries, will require adaptation measures over time.

Issues

- Maintenance and improvement of fish stocks.
- Policy decisions at European level have significant implications for the local fishing industry (e.g. EU Maritime Strategy, Common Fisheries Policy).
- Managing the needs of local industry whilst conserving and enhancing fish stocks and biodiversity.
- Balancing the needs of recreational angling with commercial fisheries and recognising the contribution of recreational angling to the economy.
- Climate change poses new threats to the fishing industry.

Opportunities

- Working together with conservation sector towards the long term sustainability of stocks.
- Continued emphasis and growth of branded Cornish produce, e.g. Cornish mussels, Cornish Sardine and traditional fishing methods.
- To build on the growth in sustainable fishing and Marine Stewardship Council certified produce.
- Opportunities for offshore aquaculture of biomass (seaweed/algae).

9 Communities and Education

- 9.1** Cornwall's communities have a rich history and a strong sense of identity that is intrinsically linked to the sea. Away from the main inland towns and cities, the settlement pattern is dispersed around the coast with over 100 towns and villages linked to ports and harbours which provide the focal point for these communities⁹⁹. The Cornish coastline is famous for its historical associations with smuggling activities¹⁰⁰ and free trade which fostered a culture of independence and activism that can still be seen in communities today. Radical approaches to local issues, e.g. the organisation 'Surfers Against Sewage' have provided a powerful voice for contemporary issues affecting local maritime communities¹⁰¹. The recognition in 2002 of Cornish as a minority language has also served to reinforce the valued distinctiveness of coastal communities.
- 9.2** The demographics of Cornish coastal towns and villages have changed significantly over time, with growing trends of both inward and outward migration, generating a range of issues. In common with many south west communities, these direct changes have meant that there is an ageing population (including from migrant retirees) and Cornwall's age profile is older than the national average.
- 9.3** Another key change and important issue for Cornwall is the reduced affordability of housing for local communities as a result of second and holiday home purchases in attractive seaside villages and harbour towns. When considered alongside Cornwall's lower (than the national average) wages, housing affordability is a particular issue. Wealthy façades can also mask pockets of deprivation that are particularly prevalent around the St Ives community on the county's north coast¹⁰².
- 9.4** Cornwall in general is perceived to be a safe location and this contributes to its attraction to residents and visitors alike. However crime can have an adverse effect on maritime leisure, business and tourism and there are existing partnerships in place to protect public safety and property in the marine environment¹⁰³.
- 9.5** Issues of isolation, due to poor road networks and limited public transport connections are as relevant for the coastal communities as for inland settlements¹⁰⁴. In particular, access to services and facilities provided at inland towns and cities means there is high level of car dependency in coastal communities.

⁹⁹ Cornwall Council (2010) Cornwall LDF Core Strategy: Draft Topic Based Issues Paper: Coast and Maritime.

¹⁰⁰ Smuggler's Britain: Smuggling in the British Isle, A History. <http://www.smuggling.co.uk/>

¹⁰¹ Cornwall Council (2010) Green Paper for Culture.

¹⁰² Cornwall Council (2010) Cornwall LDF Core Strategy: Draft Topic Based Issues Paper: Social Inclusion.

¹⁰³ Devon and Cornwall Police. Response to Cornwall Maritime Strategy Informal Consultation.

¹⁰⁴ Cornwall Council (2010) Cornwall LDF Core Strategy: Draft Topic Based Issues Paper: Transport and Accessibility.

- 9.6** In the context of these issues Cornish coastal towns and villages are resilient and communities are increasingly exploiting the opportunities brought by maritime tourism and new technologies that promote sustainable energy from the sea, as well as revitalising traditional industries such as fishing, agriculture and the arts (see also Tourism, Renewable Energy, and Fisheries and Aquaculture).
- 9.7** A key trend for Cornwall’s maritime communities lies in the development of a knowledge and skills base that supports the industries and services that will bring future growth and development to the region. Cornwall already has strong foundations in training and education for maritime industries for example, in relation to navigation, skippering, and ship building - with organisations such as the Cornwall Marine Network providing a resource and development focus¹⁰⁵.
- 9.8** Future demands will include the ongoing development of the tourism industry. Additionally, initiatives focused on making Cornwall a centre of marine based renewables (e.g. the Marine business energy park at Hayle) (see also Renewables) will require new courses to be coordinated and promoted through the Combined Universities in Cornwall¹⁰⁶.

Key Trends: Communities and Education

- Renaissance of Cornish maritime culture and sustainable approaches to traditional industries.
- Ongoing growth and development of marine tourism providing new opportunities for economic development.
- Emergence of new marine technology initiatives with requirements for new skills and capabilities.
- Declining housing affordability and growth in second home ownership in recent years.

¹⁰⁵ Cornwall Marine Network. An EU funded initiative supporting the marine sector in Cornwall. <http://www.cornwallmarine.net/>

¹⁰⁶ Combined Universities in Cornwall. <http://www.cuc.ac.uk/>

Issues

- Housing affordability is a major issue for Cornwall, exacerbated by low salaries.
- The impacts of second home ownership, creating 'ghost towns' in some areas, and especially out of season.
- Managing different uses of the marine and coastal environment and adverse impacts from some uses.
- How to fund strategic infrastructure development with loss of Regional Development Agency funding and convergence funding expiration in 2013.
- Balancing the need for jobs and economy with natural and historic environmental needs.
- Many coastal communities are at risk of coastal erosion.¹⁰⁷

Opportunities

- Opportunity to engage Cornwall's Community Network Areas in marine issues and management.
- Maritime Strategy creates opportunities for various maritime stakeholders to work in partnership.
- For more coordinated management of marine and coastal land uses to avoid conflicts and damage to the environment.
- Opportunities to enhance accessibility for communities through sustainable, resilient transport options.
- Opportunities to improve the quality of employment and careers through the creation of skills and training programmes.

Question 20. Regarding Annex 1: Background Information:

We would welcome any specific comments on the scope, content or accuracy of this Annex. Please indicate the paragraph number you are commenting on where appropriate.

¹⁰⁷ For example Coverack, Mawgan Porth and Portmellon.

Thank you for completing the questionnaire

Please return either;

by email maritimestrategy@cornwall.gov.uk

or by Post

Consultation Response,
Harbour Office,
Cornwall Council,
Town Quay, Truro,
Cornwall, TR1 2HJ

For Further Information Please call: **0300 1234 100**

This Public Consultation ends at 5pm on 18 January 2012.