

GREECO

Territorial Potentials for a Greener Economy

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Case Study

Vol 4.11. Cornwall and Isles of Sicilly



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The partnership behind the ESPON Programme consists of the EU Commission and the Member States of the EU27, plus Iceland, Liechtenstein, Norway and Switzerland. Each partner is represented in the ESPON Monitoring Committee.

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Table of contents

1	Executive summary.....	6
2	Region Cornwall and Isles of Scilly	6
2.1	Geography, environment and resources	6
2.2	Regional administrative structure	7
3	The regional economy	7
3.1	Income levels	7
3.2	Energy dependency	10
3.3	Industrial structure.....	13
4	Green transformations of the economy	14
4.1	Transformations towards a green economy.....	14
4.2	Framework conditions for regional green transformations..	15
4.3	Regional council strategies	16
5	Decarbonisation of the energy economy	17
5.1	Onshore wind energy potential.....	17
5.2	Development of supply-chain industry for ocean energy....	18
6	Circular supply-chain management of materials, water and energy	19
7	Natural ecosystems and landscapes	19
7.1	The Cornish landscape	19
8	Conclusions.....	21
9	Bibliography	23

List of Tables

Table 1	Growth rates of production, employment, population, participation, productivity and per capita production in the United Kingdom and in Cornwall and the Isles of Scilly 2000-10. Per cent per year.	9
Table 2	Growth in energy use in production, employment and energy dependency of employment in the United Kingdom and in Cornwall and the Isles of Scilly 2005-09. Per cent per year.	10
Table 3.	Location quotients of the Cornwall and Islands of Scilly region. 2010.	14
Table 4.	Onshore wind energy potential of Cornwall and Isles of Scilly.....	18
Table 5.	Areas designated to nature and regional designation rate index (UK = 1).	20

List of Figures

Figure 1.	GDP per capita adjusted to EU standard purchasing power. Per cent deviation from EU27 average. 2000-2010.....	8
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Figure 2. Crude employment rate. Per cent of resident population. 2000-10.	9
Figure 3. Energy dependency of employment in the United Kingdom and in Cornwall and Isles of Scilly. 2000-2010.....	11
Figure 4. Residential energy use (final energy use) per capita in the United Kingdom and in Cornwall and Isles of Scilly. GJ per resident. 2000-2010.	12
Figure 5. Transport energy use to production ratio in the United Kingdom and in Cornwall and Isles and Scilly 2000-2010. MJ/€(2005).	13

1 Executive summary

The greening of the UK economy has good potentials for jobs and income creation in the region of Cornwall and Isles of Scilly, the westernmost region of the South West. The per capita GDP of the region has been so low that it was entitled to objective 1 support from the EU Regional Fund. The green investments anticipated in the sea around the South West, however, offers opportunities for development of industries in the field of renewable energy technologies.

The combination of good wind and ocean energy potentials makes the South West a potential growth area for renewable energy technology. In particular, the expected development of immense renewable energy investments off the coast of the South West makes the South West to an attractive location for development and production of the plants and equipment that will be installed.

Test and demonstration facilities, port infrastructures and reinforced transmission grid belong to the fixed investments required for this vision to materialise. Thus local governments cooperate with industry on developing test facilities of a leading standard.

Local government also works in partnerships with related businesses and public research institutions, colleges and schools on generating a well skilled labour force and service supply for industries working with ocean and wind energy.

Another focus area for green transformation in the region concerns the integration of natural ecosystems restoration in the planning of economic development and water basin management. It is programmed in the Green Infrastructure Strategy aiming among others at making the region even more environmentally attractive to tourists but also to residents. This can be of importance for attracting the specialised labour force needed to work in the renewable energy industries. The programme also stresses the social inclusion aspect of improving access to rich natural spaces from deprived areas.

2 Region Cornwall and Isles of Scilly

2.1 Geography, environment and resources

The Region of Cornwall and Isles of Scilly is located in the southeast corner of the United Kingdom. About half a million people populate the 3563km².

Around 9,000 people commute into the region and 19,000 commutes out – 10,000 to Plymouth located adjacent to the region.

The services of the natural ecosystems and the landscape have always been economic assets to the Cornish economy. The prospects of developing the sea to the primary source of energy for Northern Europe offers new potentials for industrial activity in Cornwall.

In its Green Cornwall Strategy for the regional economy, the Cornwall Council finds great potentials for the green economy: “Cornwall is better placed than most to make the most of these opportunities with our superb natural resources offering distinct advantages in the fields of renewable energy; the highest levels of solar irradiation in the UK, amongst the best wind resources in Western Europe, huge potential marine energy reserve, the best geothermal resources in the UK all allied to a landscape of national and international repute” (Cornwall Council, 2011, p. 4).

2.2 Regional administrative structure

Cornwall and Isles of Scilly assumes a unitary authority as opposed to other regions where authority is shared between county and districts. The responsibilities of the Cornwall Council thus include all of the government functions specific to Cornwall: Education, highways, transport planning, passenger transport, social care, housing, libraries, leisure and recreation, environmental health, waste collection, waste disposal, planning applications, strategic planning, fire and rescue and local taxation.

Local government are delegated the authority to collect property taxes and charge fees to finance their services. Additionally, they receive central government grants, mostly earmarked for specific purposes. Property taxes include taxes on domestic properties as well as business property.

3 The regional economy

3.1 Income levels

The income level of Cornwall and Isles of Scilly is low compared to the EU and UK averages.

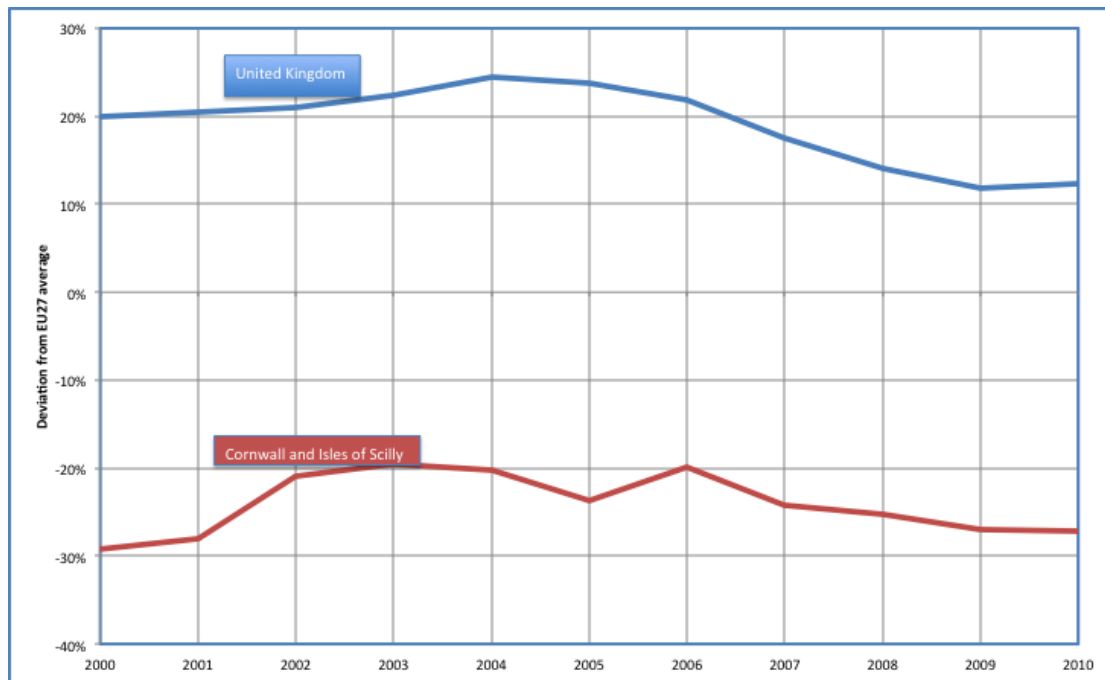


Figure 1. GDP per capita adjusted to EU standard purchasing power. Per cent deviation from EU27 average. 2000-2010.

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

Figure 1 shows that the GDP per capita measured in purchasing power parities was 20-30% lower through the 2000s than the EU27 average whereas the level is 12-25% higher in the UK. The low level of GDP has made Cornwall and Isles of Scilly eligible to European Social Fund support.

A low level of GDP is usual in regions distant from metropolitan centres and thus with relatively low accessibility to their diversified and high earning labour and service markets. The Cornish economy is specialised in sectors with low incomes - agriculture and tourism. The net-flow of commuting out of the region also implies that GDP created by the net-commuters is attributed to the neighbouring region.

The GDP per capita can be decomposed into the participation in production of the population and the average productivity of the employed persons. The participation can be measured by the crude employment rate (employment/resident population). This is shown in figure 2.

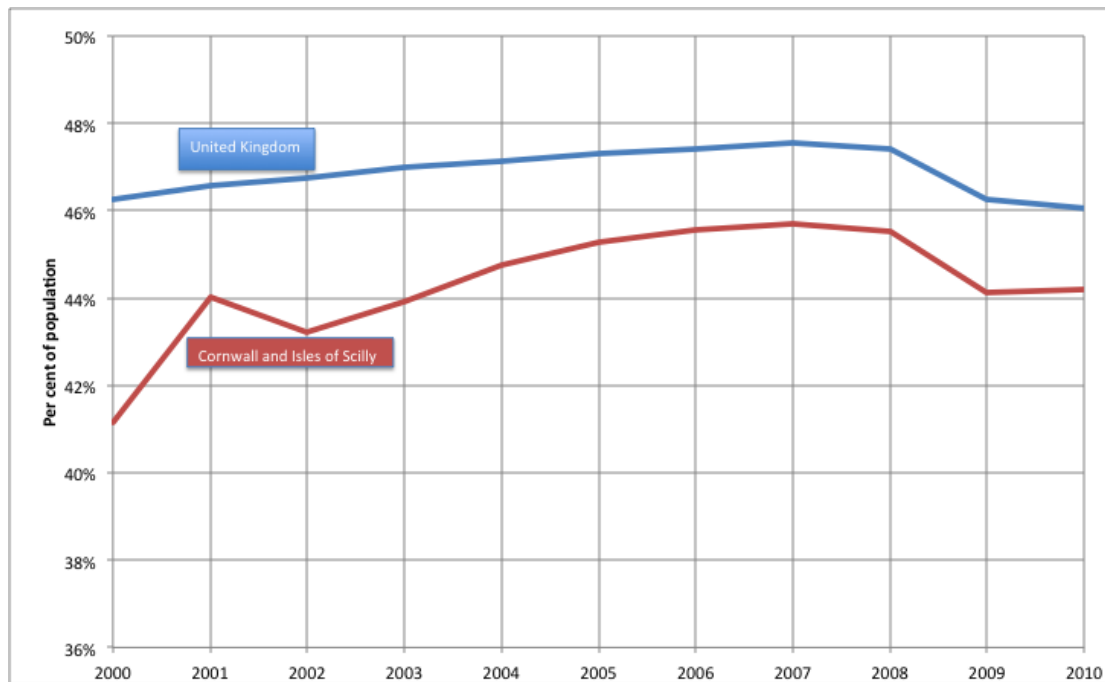


Figure 2. Crude employment rate. Per cent of resident population. 2000-10.

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

Figure 2 shows that the crude employment rate is slightly lower in Cornwall and Isles of Scilly than in the UK. This is also influenced by the net-commuting rate eastwards.

The economic growth in the 2000s is split in the growth period 2000-08 and the recession period 2008-10 in table 1.

Table 1 Growth rates of production, employment, population, participation, productivity and per capita production in the United Kingdom and in Cornwall and the Isles of Scilly 2000-10. Per cent per year.

	2000-08	2008-10	2000-10	2000-08	2008-10	2000-10
	United Kingdom			Cornwall and the Isles of Scilly		
Production	2.5%	-2.0%	1.6%	4.2%	-2.7%	2.8%
Employment	0.8%	-0.7%	0.5%	2.1%	-0.9%	1.5%
Population	0.5%	0.7%	0.6%	0.8%	0.5%	0.8%
Participation	0.3%	-1.4%	0.0%	1.3%	-1.4%	0.7%
Productivity	1.7%	-1.2%	1.1%	2.0%	-1.8%	1.2%
Per capita production	2.0%	-2.6%	1.0%	3.3%	-3.2%	2.0%

Production: GVA (in 2005 prices)

Employment: Number of persons employed

Population: Resident population

Participation: Crude employment rate (employment/population)

Productivity: Labour productivity (production/employment)

Per capita production: Production/population

Source: Author's calculations based on GREECO datasets.

The average growth of GVA per capita in the region was 2% through the 2000s compared to 1% in the UK as a whole. The population grew more than the total UK population in the growth period and the participation of the population as well as the productivity in the same period also grew faster relative to the national average.

3.2 Energy dependency

Despite this growth in the 2000-08 period, the energy dependency – the final use of energy in production per employee - dropped at a rate of 2% annually in Cornwall and Isles of Scilly in the years 2005-08. The energy dependency was even more reduced in the recession 2008-09.

Table 2 Growth in energy use in production, employment and energy dependency of employment in the United Kingdom and in Cornwall and the Isles of Scilly 2005-09. Per cent per year.

	2005-08	2008-09	2005-09	2005-08	2008-09	2005-09
	United Kingdom			Cornwall and the Isles of Scilly		
Energy use in production	-1.5%	-12.4%	-4.4%	-2.0%	-9.1%	-3.8%
Employment	0.7%	-1.8%	0.1%	0.9%	-2.7%	0.0%
Energy dependency	-2.2%	-10.8%	-4.4%	-2.9%	-6.5%	-3.8%

Energy use in production: Final energy use in production

Employment: Number of persons employed

Energy dependency: Energy use in production/employment

Source: Author's calculations based on GREECO datasets(Hansen, 2013).

The carbon dependency can be calculated as the product of the energy dependency of employment and the carbon dependency of energy. The development of the energy dependency through the 2000s is shown in more detail in figure 3.

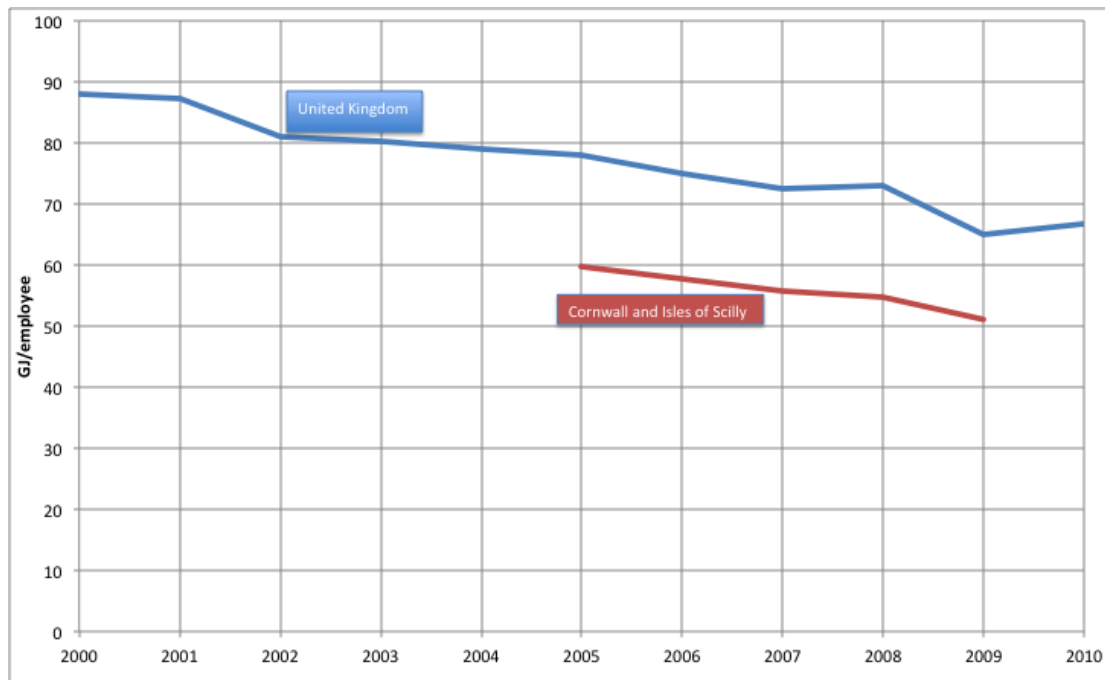


Figure 3. Energy dependency of employment in the United Kingdom and in Cornwall and Isles of Scilly. 2000-2010.

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

The jobs in Cornwall and Isles of Scilly are less energy intensive than average jobs in the rest of the UK. This is in accordance with the high share of service sector jobs in the region.

The mild winters in this part of the UK should likewise materialise in lower residential energy use per capita than the UK average. This is confirmed by the data shown in figure 4.

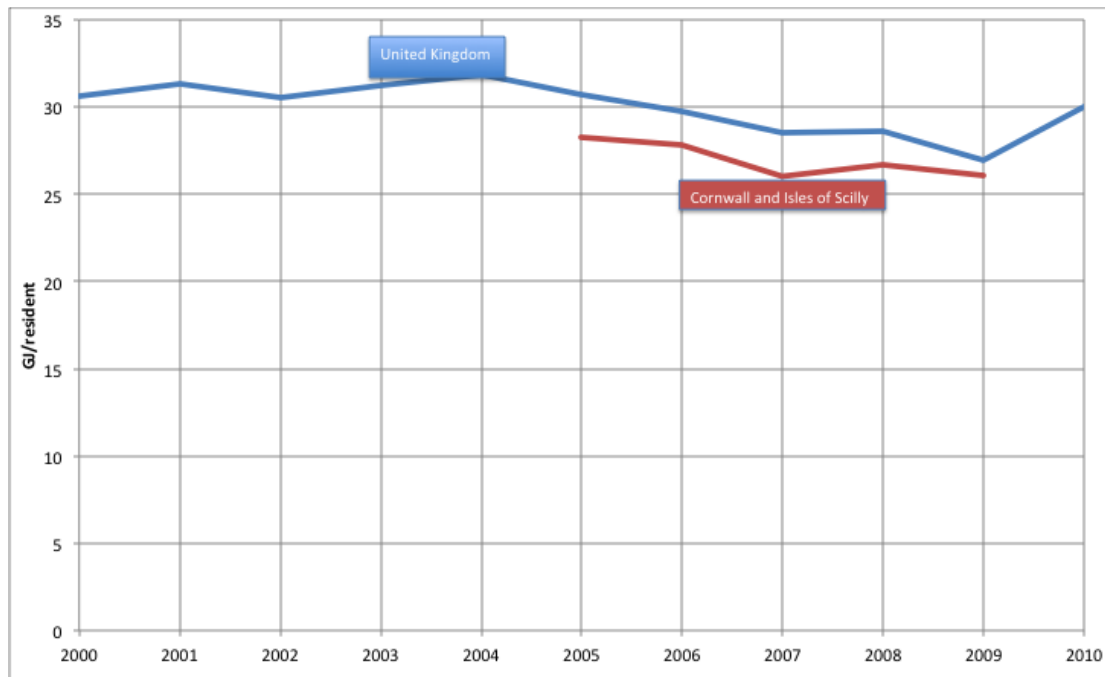


Figure 4. Residential energy use (final energy use) per capita in the United Kingdom and in Cornwall and Isles of Scilly. GJ per resident. 2000-2010.

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

The ratio of transport energy to production is higher in Cornwall and Isles of Scilly than in the UK. The motorisation rate of the region is also higher than the national average.

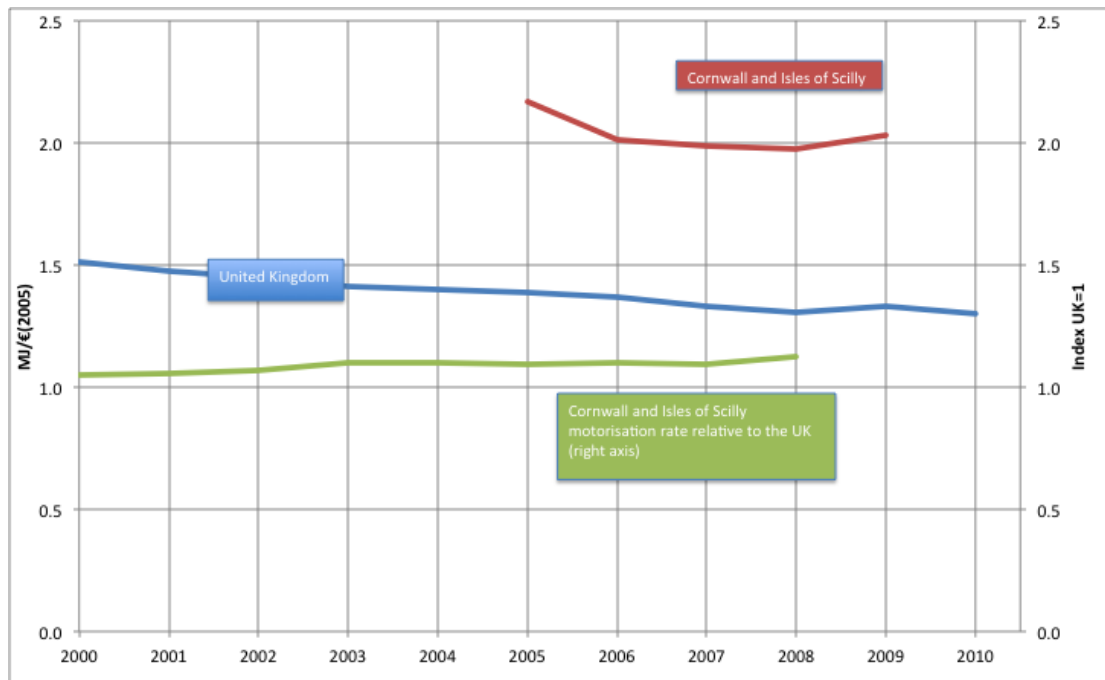


Figure 5. Transport energy use to production ratio in the United Kingdom and in Cornwall and Isles and Scilly 2000-2010. MJ/€(2005).

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

3.3 Industrial structure

Cornwall is relatively specialised in agriculture, tourism and public services. More than half of the employed work in trade, services and communications and the public service sectors.

Table 3. Location quotients of the Cornwall and Islands of Scilly region. 2010.

	Agri- culture, forestry and fisheries	Industry	Trade, transport and commu- nication	Financial sector, real estate and professional services	Public services
	Relative to EU27				
United Kingdom	0.39	0.88	1.03	1.12	1.01
Cornwall and Isles of Scilly	1.69	0.81	1.16	0.82	1.20
	Relative to the UK				
Cornwall	4.38	0.91	1.13	0.74	1.18

The location quotients are computed as ratio of the share in GVA generation of each sector to the corresponding share at the UK or EU level.

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

4 Green transformations of the economy

4.1 Transformations towards a green economy

The future green economy of Region Cornwall and Isles of Scilly will comprise the same sectors, but their production processes will be resource efficient and their products and services will be adapted to resource efficiency including efficient use of ecosystem services.

Transformation processes in three groups of industrial branches are reviewed below

- manufacturing
- energy
- nature experience

Technologically, the transformation of these groups proceeds along broad lines of technological change:

- Substitution of fossil fuels, hazardous chemicals, scarce metals etc by alternatives with less source, sink and area scarcity
- Harvesting of biotic resources at a sustainable and efficient level
- Reduction of energy and materials waste
- Recovering and recycling of energy and materials flows
- Production of equipment, raw materials and intermediate goods designed for above uses

- Production of equipment and final goods for household consumption substituting unsustainable materials and energy flows and reducing, recovering and recycling waste of materials and energy

The region can increase its industrial attractiveness by offering attractive conditions for industries that are expected to be in demand due to the green transformation of the European economies as well as by increasing the residential and tourist attractiveness of the region.

The region has pointed out the industrial and engineering activities along the supply-chain backing the expected massive investments in ocean energy and offshore wind-farms. Also other supply-chain activities behind onshore renewable energy are pursued.

Traditionally the region has a high level of tourist attractiveness not least due to its beaches, landscapes and climate. The same properties of the natural ecosystems of the region make it attractive for residents as well, but the low accessibility to diversified labour markets lowers the residential attractiveness. The nature-based residential attractiveness can be an important factor in attracting specialised labour to the energy technology supply-chains mentioned above.

4.2 Framework conditions for regional green transformations

The UK government strategy for how to mobilise the business sector in the transition to a green economy is presented in the comprehensive plan for “Enabling the Transition to a Green Economy: Government and business working together” (HM Government, 2011). The plan outlines programmes to be carried out in a process of transforming the economy including mainly

- decarbonisation and energy delinking,
- circular supply-chain management of materials, water and energy and
- investment in ecosystem services.

The local authorities play a key role in implementing the green solutions as they are responsible for physical planning, transport planning, waste treatment and wastewater.

The Committee of Climate Change has published a report on the options for local authorities in the process of decarbonising the economy. They are social landlords, community leaders and major employers. The central government has adopted programmes that make instruments available to the local governments for promoting home insulation towards energy efficient buildings. With their physical planning powers, the local authorities can enforce energy

efficiency standards in new buildings, plan for urban structures that minimize car transport needs, help reconciling conflicts of interest in local planning of renewable energy and plan for low-carbon district heating, green infrastructure and sustainable transport. They can introduce waste separation and recycling. The local authorities can also invest in energy efficiency in their own buildings, outdoor lighting and transport fleets and enlarge the market for green innovations through their own procurement expenditures (Committee on Climate Change, 2012).

The Cornwall Council has taken on many of these options for contributing to the decarbonisation of the economy.

4.3 Regional council strategies

The Cornwall Council adopted in 2011 a "Green Cornwall strategy" to guide the economy of the region towards a green economy (Cornwall Council, 2011). The strategy aims at achieving the following outcomes:

- Cutting the CO2 emissions of the council by 40% by 2020
- Contributing towards cutting Cornwall's green house gas (GHG) emissions above national targets (34%) by 2020
- Supporting the increase in renewable energy production to meet the national 15% target of non-transport related energy by 2020
- Providing leadership to promote non-transport related energy demand reduction of 10% by 2020
- A measurable transformation towards a lowcarbon economy
- Measurable community benefit (fuel poverty levels, renewable heat incentive (RHI) and FITs utilised for local benefit

The progress so far towards these outcomes were assessed in 2013 (Cornwall Council, 2013a). The strategy is expected to create at 10,000 jobs in maritime and geothermal energy industry and smart grid and electric vehicle solutions.

The production development initiatives are to be developed in a public-private local enterprise partnership (LEP). It has developed a strategy for economic development (Cornwall and Isles of Scilly Local Enterprise and Partnership (LEP), 2012).

The Council also has adopted strategies on a green infrastructure (Cornwall Council, 2013b) and on maritime resources (Cornwall Council, 2012). They are important for the protection and economic development of the ecosystem services of the region.

Among the green economy production projects supported by the Green Cornwall Strategy is the establishment of a marine energy park (South West MEP, 2012) to produce equipment and service to

the considerable investments expected to be made in sea based energy: Offshore wind farms, wave energy, tidal energy etc. This project will exploit the ideal location of Cornwall in relation to the sea areas where much of the sea energy investments in Europe will be made.

Other projects include geothermal energy and smart grid (Cornwall Council, 2013c).

The green infrastructure is defined as

Green Infrastructure in Cornwall includes:

- Green Places – Historic, natural, semi-natural and designed areas such as parks, woodlands, informal open spaces, allotments, street trees, multi-use trails, churchyards and other publicly accessible open rural and urban spaces
- Blue Places – rivers, waterways, canals and lakes
- Yellow Places – beaches

That is, it includes natural ecosystems as well as designed green areas.

In parallel with the LEP the region council has developed a local environmental partnership with local actors working to protect the environment of the region (LUC, 2012a).

This long-term vision was followed up by an plan for immediate action in the first six months (LUC, 2012b).

5 Decarbonisation of the energy economy

5.1 Onshore wind energy potential

The potential for onshore wind energy generation in the region of Cornwall and Isles of Scilly are good. Table 4 shows for the region the results of an assessment of the European onshore wind potential carried through in the GREECO project.

Table 4. Onshore wind energy potential of Cornwall and Isles of Scilly

Feed-in price	10c/kWh	8c/kwh
Per capita wind energy potential (<i>Mwh/yr/person</i>)	18	16
Rent to GVA (2009) ratio (<i>per cent</i>)	5%	3%

Meso-scale assessment assuming uniform wind energy density at wind energy compatible areas. Rent = feed-in price – levelised cost of electricity generation. No account of specific installation and grid connection costs.

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

5.2 Development of supply-chain industry for ocean energy

The establishment of a marine energy park (South West MEP, 2012) is a high priority goal that with a potential to change the economy into a more high earning economy by supplying the capital equipment required for a green energy economy. The South West includes much more than Cornwall and Isles of Scilly and extends into West England. Three ports are expected to serve as hubs: Bristol, Plymouth and Falmouth. Four other harbours of the region will serve as operations and maintenance ports.

The marine energy potentials off the coast of the South West are immense and a considerable investment demand in the future is anticipated.

Although local government action is critical for actually transforming the economy towards the green economy, it has no chance of changing the economy without the appropriate framework conditions provided by the central government. The future demand for non-combustible renewable energy such as ocean energy (wave, tide and current) is relatively certain, but the timing of it is very uncertain, also in the UK where vast potentials of these energy sources have been assessed. The uncertainty arises not least from the expiry date of the current legislation. The companies supplying the technologies jointly explained to the government that their investments await government decisions on renewable energy in the 2020s (Reece, 2012). However, when the uncertainty about the future demand for renewable energy eventually is reduced and more investments are made the South-West will for many reasons be a preferable region for locating development and production units.

The regional innovation network on ocean energy includes dedicated research centres as well as world-class test and demonstration

facilities. It is estimated that 300-500 people are employed in this field in the South West and this number could be raised to 5000 jobs (South West MEP, 2012).

Realising this requires – in addition to the national and international framework conditions – investments in more test facilities, port infrastructure, reinforced electricity transmission grid and a labour force with specialised skills. The colleges and the marine school of the region already provides specialised education in these technologies (South West MEP, 2012).

The ambition is to become the leading region for the development of ocean energy technologies.

6 Circular supply-chain management of materials, water and energy

In 2009 the rate of recycling in the region was 26% close to the national average of 24%. The rate of solid waste that was landfilled was 62% compared to the national average of 49% (Hansen, 2013).

The handling of solid waste, piped water and waste water represents 0.5% of the regional employment and 1.2% of the regional creation of gross value added. This compares to the national figures of 0.6% and 1.2%, respectively (Hansen, 2013).

Waste and wastewater treatment is typically included in green products and jobs accounts. It is, however, not necessarily the kind of jobs, we would like to have more of. Less waste would be preferable and would reduce the demand for services in this sector.

7 Natural ecosystems and landscapes

7.1 The Cornish landscape

The biodiversity in the EU has been in decline and it has been agreed to stop and reverse this decline. At the same time, climate change with its more intense precipitation and cloudbursts calls for restoration of some of natural routes for water to run off and natural buffers for large amounts of water.

Natural ecosystems and landscapes, however, also provide economic services that make locations attractive for residents as well as for tourists. Thus such investments in natural ecosystems may have an economic potential to them as well.

It is difficult to express the average nature quality of a whole region, but combining land cover and nature designation can be a useful approach. The allocation of land in Europe has been analysed in the GREECO project on the basis of the Corine Land Cover dataset combined with the European databases of NATURA2000 and nationally designated nature areas. Some results for the United Kingdom and the region of Cornwall and Isles of Scilly are shown in table 5.

Table 5. Areas designated to nature and regional designation rate index (UK = 1).

Areas	United Kingdom			Cornwall and Isles of Scilly			
	Designation			Designation			Nature des. index
	Nature	Economy	Total	Nature	Economy	Total	
Urban (CLC1-9)	0.2%	6.4%	6.6%	0.4%	3.9%	4.3%	2.7
Green and sports (CLC10-11)	5.5%	22.4%	27.9%	9.6%	25.1%	34.6%	1.4
Cultivated (CLC12-17)	3.8%	24.3%	28.1%	12.7%	35.4%	48.1%	2.0
Extensive agric. (CLC18-21)	0.3%	0.7%	1.0%	0.1%	0.2%	0.3%	1.8
Forest and open (CLC22-34)	12.5%	15.4%	28.0%	5.4%	3.3%	8.7%	1.4
Water (CLC35-43)	3.6%	2.7%	6.3%	1.6%	1.0%	2.6%	1.1
Other and not reg. (CLC44-255)		2.1%	2.1%		1.3%	1.3%	#N/A
Total	26.0%	74.0%	100.0%	29.9%	70.1%	100.0%	1.2

Areas are classified according to the Corine Land Cover classification.

Source: Author's calculations based on GREECO datasets (Hansen, 2013).

The regional index of nature designation shows that in the region of Cornwall and Isles of Scilly a larger share of any of broad classes of land cover has been designated for nature than in the rest of the country.

The green infrastructure strategy adopts the approach of mixed-use and multiple benefits of ecosystems. It is a key point that the investments in and protection of natural ecosystems combine different benefits such as biodiversity protection, access to recreation, flood alleviation and sustainable transport (bicycle, walking, public transport). The strategy also stresses the social inclusion effect of upgrading access to rich natural spaces from deprived areas – they are usually also the least environmentally attractive. (Cornwall Council, 2013b).

The ecosystem conservation and restoration projects are managed within a catchment area framework. This enables for instance integrating the flood control function with other functions.

The regional authorities have since 2009 been equipped with the opportunity of financing such infrastructure by a community infrastructure levy (CIL). It is a levy per square-metre of internal floor-space of new developed areas.

Other possible sources of finance includes flood defence funding, lottery and European funding, Agri and other environmental schemes (including the new Common Agricultural Policy (CAP) 2014 – 2020)) and bio-diversity offset or habitat banking (Cornwall Council, 2013b).

The strategy on maritime resources aims at a sustainable use of these resources for the benefit of the economy (Cornwall Council, 2012).

8 Conclusions

The greening of the UK economy has good potentials for jobs and income creation in the region of Cornwall and Isles of Scilly.

The combination of good wind and ocean energy potentials makes the South West a potential growth area for renewable energy technology. In particular, the expected development of immense renewable energy investments off the coast of the South West makes the South West to an attractive location for development and production of the plants and equipment that will be installed.

Test and demonstration facilities, port infrastructures and reinforced transmission grid belong to the fixed investments required for this vision to materialise.

Local government works in partnerships with related businesses and public research institutions, colleges and schools to generate a technological competence basis for this industrial development.

These potentials might be just what is needed to elevate the region of Cornwall and Isles of Scilly from its low-income position in the European regional hierarchy.

Another green transformation consists of integrating the use of natural ecosystems to generate economic as well as ecological benefits. It is programmed in the Green Infrastructure Strategy aiming at making the region even more attractive to tourists but also to residents, which can be of great importance for attracting the specialised labour force needed to work with renewable energy

technology. The programme also stresses the social inclusion aspect of improving access to rich natural spaces from deprived areas.

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