This report has emerged from a workshop held in 1998 as part of preparations for the new South West of England Regional Development Agency (SWERDA). This workshop involved a number of economic, social and environmental partners, and considered the role of the South West's environment in an evolving regional economic agenda. An Environment Prospectus Group was formed and agreed to take this work forward. An Environmental Prospectus for South West England is offered as a first step in an area of work which we hope will be taken forward by SWERDA and others charged with the economic development of the Region.

The Environment Prospectus Group includes those organisations which have contributed to the funding of this report, plus the South West Regional Planning Conference, Country Landowners Association, Community Council for Somerset and Devon Conservation Forum.

This Group has acted on behalf of a wider partnership of organisations established through the workshop in 1998: Bristol Water plc, British Trust for Conservation Volunteers (BTCV), Business Link - Dorset, Campaign for the Protection of Rural England (CPRE), Community Council for Somerset (CCS), Cornwall College, Countryside Commission South West Region, Country Landowners Association (CLA), Dartmoor National Park Authority, Devon Conservation Forum, English Nature, Environment Agency, Farming and Wildlife Advisory Group (FWAG), Federation of Small Businesses (FSB), Forestry Commission (Severn, Wye & Avon Conservancy and South West Conservancy), Friends of the Earth (FoE), National Trust in the South West, PAYBACK, Royal Society for the Protection of Birds (RSPB), South West Regional Planning Conference, Surfers Against Sewage (SAS), Sustainable Futures, University of Exeter, University of Plymouth, University of the West of England (UWE), Wessex Water plc, West Country Tourist Board (WCTB), Wildlife Trusts in the South West.

All the views expressed in this report may not necessarily be shared by all these organisations.
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March 1999
EXECUTIVE SUMMARY
AN ENVIRONMENTAL PROSPECTUS FOR SOUTH WEST ENGLAND

AN ENVIRONMENTAL PROSPECTUS FOR SOUTH WEST ENGLAND
EXECUTIVE SUMMARY

LINKING THE ENVIRONMENT WITH JOBS AND WEALTH CREATION

With the emergence of the new South West of England Regional Development Agency (SWERDA) and the Regional Chamber as a voice of regional government, the South West region will achieve greater prominence than ever before both within the UK and across Europe. In meeting the challenges of the future, it is essential that the region pursues policies and programmes that play to the real strengths of the South West.

The environment of the South West is a key regional strength and one that sets it apart from other English regions. The varied and dramatic landscapes, the rich and diverse wildlife, and the sense of place and quality of life for which the South West is so well known, are already of immense value to the great many who live in, work in, and visit the region.

At a workshop held in 1998 a number of economic, social and environmental experts considered the role of the South West in an evolving regional economic agenda. A Workshop was convened to take forward the work of the Environment and Economic Prospectus, a key focus in today’s work to develop the environment and economic development in the region towards a more sustainable, healthy and prosperous future.

The information, case studies and recommendations in this report will be of immense interest and value to decision makers across the Region. We must all look increasingly towards the environment and related sectors as a key force in today’s and tomorrow’s development. Those charged with economic development in the region must now take the work forward.
Facilities are put in place:
- Help business to respond to new environmental legislation and policy

As a voice for the Region and in developing best practice, SMEs and others

FUTURE OPPORTUNITIES

The economy associated with the environment is a fast growing sector. Significant

RECOMMENDATIONS

A South West Economic Development Vision should:
- Ensure that opportunities presented by the environment for supporting and enhancing a diverse and strong economy are fully recognised and promoted, particularly in the rural areas of the South West.

A South West Economic Strategy should:
- Develop a skills strategy that matches the existing and future opportunities offered by environment-related activities in the Region.
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- Identify flagship environmental projects and praise programmes which encourage environmental benefits.
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AN ENVIRONMENTAL PROSPECTUS FOR SOUTH WEST ENGLAND

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With the right approach, the environment has the potential to contribute even further to the sustainable development of the South West, securing economic, social and environmental benefits for the Region which will be in everyone's interest.

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With the emergence of the new South West of England Regional Development Agency and Regional Chamber, the South West Region will achieve greater prominence than ever before across the UK and Europe. In meeting the challenges of the future, it is essential that the Region pursues policies and programmes that will play to the real strengths of the South West.

The environment of the South West is one of the Region's key strengths and one that sets it apart from other English regions. The varied and dramatic landscapes, the rich and diverse wildlife, the overall sense of place and quality of life for which the South West is so well known, are already of immense value to the great many who live in, work in and visit the Region. With the right approach, the environment has the potential to contribute even further to the sustainable development of the South West, securing economic, social and environmental benefits for the Region which will be in everyone's interest.

On behalf of the partnership of organisations behind An Environmental Prospectus for the South West, I am very pleased to offer this publication as a means of promoting such an approach. The information and case studies contained within this publication and the recommendations that it makes will I believe be of immense interest and value to a wide range of decision makers across the Region.

I hope An Environmental Prospectus for the South West inspires you to look increasingly towards the environment and related sectors as a key force in today's and tomorrow's development.

On behalf of the Environmental Prospectus Group

Katharine Bryan
Regional General Manager - Environment Agency South West

FOREWORD
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1.1 THE ENVIRONMENT AND ECONOMIC DEVELOPMENT

With a new Regional Development Agency (The South West of England Regional Development Agency - SWERDA), revised Regional Planning Guidance (RPG) and the emergence of the Regional Chamber as an active voice of regional government, regional affairs are now paramount. Key choices face those involved in planning and managing the economy of the South West. The organisations that have come together to produce this Environmental Prospectus understand that, if sustainable growth is to be achieved, then environmental and social concerns have to be integrated into economic decision-making. Policies, programmes and projects have to achieve economic, social and environmental objectives.

In this Prospectus, we describe the nature of the link between the environment and the economy. We also explore some of the real job and wealth sustaining opportunities that the environment presents. We believe that the environment provides an important basis for economic development, both directly through growth in those sectors already involved in the environment, and indirectly through the contribution of a healthy and high quality environment across the region, making it a place where people want to live and work.

1.2 ENVIRONMENT AND THE ECONOMY LINKAGES

This Prospectus begins to explore the nature of the positive linkages between the environment and the economy in the South West. It is worth noting here the key elements of the overall linkage (after RSPB, 1999):

- the growing size of the environmental industry - businesses and organisations focusing on the supply of environmental goods and services;
- increasing employment opportunities associated with environmental compliance and enhancement in industry, and in sectors such as transport, energy and agriculture;
- the importance of environmental progress for long term industrial and business competitiveness;
- the recognition that clean technologies are efficient, can save money and enhance productivity and hence growth;
- evidence that failure to meet environmental responsibilities today can limit development and incur greater cost to the economy and society in the future;
- the growing importance of enhanced environmental quality for the tourism sector, and in creating conditions for inward investment and business growth.

Historically business has often seen environmental issues as a constraining factor. However, the evidence is now quite the opposite in that opportunities provided by the environment are likely to outweigh the perceived risks.

1.3 SUSTAINABLE DEVELOPMENT

The new RDAs are the first development agencies in the UK to have a specific duty to contribute to sustainable development in the regions. Sustainable development aims to pursue the following three objectives in such a way as to make them mutually compatible for economic, social, environmental and human development:

(i) sustainable, non-inflationary economic growth;
(ii) social cohesion through access for all to employment and a high quality of life;
(iii) environmental sustainability and improvement.

The policy background elsewhere, at European and UK levels, is increasingly providing a progressive approach to environmental improvement. Our challenge to those involved in the new regional development agenda is to give proper weight to environmental concerns, understand the significant contribution the environment makes to the region’s economy and capture this very special asset in planning for our future.

1.4 INTRODUCTION

This Prospectus is largely based on a report commissioned by the Environment Prospectus Group from consultants: Environmental Resources Management: An Environmental Prospectus for the South West of England, February 1999, Ref 5697.

The Prospectus focuses on the supply of environmental goods and services, the environmental industry, environmental quality, and the role of the environment in the economy. The Prospectus begins by exploring the nature of the link between the environment and the economy. It then goes on to explore some of the real job and wealth sustaining opportunities that the environment presents. We believe that the environment provides an important basis for economic development, both directly through growth in those sectors already involved in the environment, and indirectly through the contribution of a healthy and high quality environment across the region, making it a place where people want to live and work.

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For our future, and in order to meet this very special asset in planning and capture the environmental industry, environmental quality, and the role of the environment in the economy, the Environment Prospectus Group has developed a Prospectus that explores the nature of the link between the environment and the economy. The Prospectus begins by exploring the nature of the link between the environment and the economy. It then goes on to explore some of the real job and wealth sustaining opportunities that the environment presents. We believe that the environment provides an important basis for economic development, both directly through growth in those sectors already involved in the environment, and indirectly through the contribution of a healthy and high quality environment across the region, making it a place where people want to live and work.

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which states that 'the current development model in the Community … is characterised by an insufficient use of labour resources and an excessive use of natural resources, and results in a deterioration of the quality of life.'

The European Commission’s subsequent Communication on Environment and Employment presents an agenda for building a sustainable Europe, defined as one 'which achieves a competitive economy combined with less environmental degradation, improved resource efficiency of energy and raw materials, and higher employment rates'.

1.4 CAPTURING THE ENVIRONMENT IN DEVELOPMENT PROGRAMMES

With this shift at all levels of governance, what does the movement towards sustainable development look like? How can it be made more meaningful to those involved in pursuing sustainable development?

There is a growing body of material that identifies and promotes strategic measures for sustainable development. This Prospectus starts the task of further specifying the South West agenda. One such suite of recommendations is provided by ECOTEC (1997) (Box 1.1).

Box 1.1 Encouraging Sustainable Development in Funding Programmes

The following principles are included in a handbook developed to assist programme managers to identify and promote those features of Objective 2 programmes which can significantly change regional development towards sustainable patterns.

- Enhancing and maintaining environmental quality (e.g., supporting urban renovation schemes, cleaning up derelict and contaminated industrial sites);
- Ensuring adequate environmental infrastructure is available;
- Ensuring there are environmental awareness and 'adjustment' programmes for SMEs;
- Helping to support environmental industries;
- Encouraging the application of 'clean technologies' and products;
- Supporting energy conservation, materials re-use and recycling;
- Supporting development on brownfield sites;
- Supporting development on sites already served by road/utilities/rail infrastructure;
- Supporting innovation in new 'green' products, processes and services.
- Promoting the production and use of renewable energy and materials;
- Encouraging economic sectors with low environmental impact;
- Supporting environmentally responsible, integrated transport;
- Supporting the use of information technology;
- Spatial planning to reduce environmental impacts;
- Development planning to encourage industrial ecology.

These then are a useful toolkit for providing a shift towards more sustainable development. Our task in the South West is to identify our specific regional opportunities to use these to best effect.

1.5 THE ENVIRONMENTAL PROSPECTUS FOR THE SOUTH WEST

In producing this Prospectus, we had three goals:

- To assist regional development players in the SW by indicating a broad range of activities which capture joint benefits for the environment and the economy;
- To promote a positive approach by quantitatively demonstrating the range and scale of some of these benefits in the regional context;
- To highlight some of the future opportunities which should be addressed within a regional development strategy.

The Environmental Prospectus is a starting point. We urge SWERDA and others charged with development in the Region to take up the challenge with real vigour.

1.5.1 Structure of the Environmental Prospectus

The structure of the Environmental Prospectus for the South West is outlined below.

- Section 1: Introduction.
- Section 2: Trends and Analysis.
- Section 3: Prospects.
- Section 4: Recommendations.
- Section 5: Support Mechanisms.
- Section 6: Case Studies.
- Section 7: annexes.

The annexes are a useful toolkit for providing a shift towards more sustainable development. Our task in the South West is to identify our specific regional opportunities to use these to best effect.

One of the tasks of producing this Prospectus is to assist regional development players in the SW by indicating a broad range of activities which capture joint benefits for the environment and the economy. Our task is to identify our specific regional opportunities to use these to best effect.

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1.4.1 CREATING THE ENVIRONMENT IN DEVELOPMENT PROGRAMMES

- Higher employment rates;
- Resource efficiency of energy and raw materials, and risk assessment of environmental damage;
- Building a sustainable European economy, which addresses a competitive economy combined with improved environmental management, industrial efficiency, and rural development.

The European Commission’s ambition is to deliver a clear demonstration of environmental improvements that result in a reduction of pollution loads, an increase in the use of renewable resources, and an increase in the production of clean energy. The environmental challenge is to ensure that the current development model in the Community ... is characterised by an intensification in which states that the current development model in the Community … is characterised by an insufficient use of labour resources and an excessive use of natural resources, and results in a deterioration of the quality of life.'

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1.6 THE REGIONAL ECONOMY: AN OVERVIEW

The South West region, comprising the Isles of Scilly, Cornwall, Devon, Dorset, Somerset, Wiltshire, Gloucestershire and the former county of Avon, had an economic output of around £50 billion and contributed nearly 8% of UK GDP in 1996.1 These figures conceal considerable variation within the region. For example, GDP per head ranges from 26% below the UK average for Cornwall, to 15% above the average for Wiltshire. In general, the north and west of the South West contributes more than the south and east of the region, given the higher levels of population and economic activity.

Box 1.2 presents some key statistics about the regional economy, particularly for those sectors that have strong linkages with the environment.

Box 1.2 Key Strengths of the Regional Economy

The regional economy is particularly strong in:

- Financial and business services, with just over a quarter of the region's GDP being derived from this sector; only London and the South East have higher proportions. However, small business sites of fewer than ten employees account for over 85% of all sites, and only 2.5% of sites employ 50 plus.
- Tourism, which is very strong, accounting for £3.5 billion or around 7% of GDP in 1996, representing 13% of total expenditure by tourists in the UK. In that year, 21.7 million tourists (10% of whom came from overseas) visited the South West, a 21% increase on 1991 figures.
- Agriculture, which accounts for almost 4% of GDP compared with less than 2% for the UK as a whole. 2% of employees and 12% of the self-employed work in agriculture. Over three quarters of the regional land area is in agriculture, mainly beef, sheep and dairy farming.

1.7 THE ENVIRONMENT: AN OVERVIEW

The environment of the South West is one of the most rich and diverse in the UK. Quality of life, seen by many to be a key asset, in turn attracts people to live and work in the region. In a recent survey of company executives,2 57% stated that overall quality of life was the most important factor for relocation to the region.

Box 2.1 presents some environmental statistics for the South West, highlighting the high proportion of people who live and work in the region who are employed in environmental industries, and the significant amount of money spent on environmental activities. The South West region contributes the largest proportion of environmental expenditure in the UK, with nearly £1.7 billion spent on environmental activities in 1996.

Box 2.1 Regional Environmental Expenditure

In 1996, the South West region spent £1.7 billion on environmental activities, representing 7% of the UK total. The highest levels of expenditure were on pollution control, waste management, conservation and recreation, and research and development.

1.6 The regional economy and environment:

The South West region has a strong economy and environment. The region's economic and environmental strengths are characterised by:

- A high proportion of people who live and work in the region that are employed in environmental industries.
- The significant amount of money spent on environmental activities.
- The high quality environment, which attracts people to live and work in the region.

These figures confirm the considerable value of the environment to the South West regional economy.
relocate to, and a further two cities in the South West, Plymouth and Exeter, featured in the top ten.

The natural and built environment have been shown to be the two most important factors in 'quality of life', and the environmental assets of the South West are disproportionately high to its land area.

Box 1.3 below presents a summary of the region's key environmental strengths.

**Box 1.3 Key Environmental Attributes of the South West**

**Landscape, Historical and Cultural Strengths of the Region**

- There is an enormous length of coastline. Much of this coastline (638 kilometres in all) has been designated as Heritage Coast, more than 60% of the total for England.
- Nearly half the UK's EU designated bathing waters.
- Areas of Outstanding Natural Beauty, that is landscapes of national scenic importance, cover almost a third of the land area, double the proportion in England as a whole.
- The region includes: the World Heritage Sites of Stonehenge, Avebury and the City of Bath; over 6,000 Ancient Monuments, that is 37% of the total for England; and over 100,000 individual listed buildings.
- The landscapes and cultural heritage of the South West are frequently celebrated in culture and the arts, having inspired poetry, prose, painting and music.

**Valued Habitats and Species of the South West**

- The region possesses a high proportion of some of the UK's rarest and most endangered habitats.
- The flora and fauna in the region is of local, national and international importance, and includes:
  - Some 25 species that are globally important:
    - the greater horseshoe bat - 70% of whose UK population occurs in the SW.
    - The greater spotted woodpecker.
    - The sand lizard - one of the few lizards in the UK with a sandy habitat.
    - The western ramping-fumitory, Fumaria narcissina.
  - 34 UK endemic species, 11 of which are unique to the region.
  - Some 25 species that are globally important:
    - The flora and fauna in the region is of local national importance and notable.

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1. The South West Biodiversity Group, The Importance of Biodiversity to the South West
2.1 INTRODUCTION

In this section we examine the nature and significance of the ‘environment sector’ as it stands today. How big is the sector? What are its components? We have used the term ‘environment sector’ to capture the wide range of firms, organisations and types of activities which fall within our description: those firms and organisations which have a direct relationship with environmental protection activities; either by nature of their business activity or by providing goods and services to help others minimise their impact on the environment.

Standard industrial statistical descriptions do not have a separate "environment sector" industry classification; for instance, firms which fall within this category are located in all types of NACE 1 defined industries. We have therefore gathered readily available information from a range of sources to demonstrate the size and potential for growth in some activities which form part of the South West’s environment sector.

The economic activities explored in this section are:

- the environment industry (Section 2.2);
- business and environmental management (Section 2.3);
- renewable energy (Section 2.4);
- waste management (Section 2.5);
- sustainable transport (Section 2.6);
- the natural environment sector (Section 2.7).

The section concludes with an overall assessment of the economic benefits derived in the South West from the activities explored above. It should be noted though that this is by necessity a conservative starting point. Other areas of economic activity could clearly be brought into this exploration, eg, the sea fishing industry. This is a task for further stages.

2.2 THE ENVIRONMENT INDUSTRY

Rapid growth in EU and UK environmental legislation and policy, coupled with businesses adopting greener processes and performance standards, has given rise to the ‘environment industry’, which comprises those firms which provide goods and services which are used for environmental protection.

In the UK, the environment industry, on a fairly narrow definition, employs nearly 200,000 people and has become a 10 billion ECU business sector. The UK environment industry contributes 4 billion ECU of value added to the economy. Accelerated growth in this industry is expected to continue, with estimated annual growth rates of some 8% in both the UK and the EU. Environmental goods and services, in the form of products and services which provide environmental protection, are used for the prevention, reduction, or avoidance of environmental harm, or for the improvement of environmental quality.

The traditional environment industry includes both public and private sector activities. Table 2.1 overleaf only provides information on the private sector activities. The private sector is therefore considerably underrepresented in the table.

Table 2.1 shows the number of firms and employees in the environment sector in the South West. Environmental businesses with fewer than 40 employees account for over 60% of the total number of firms in the South West. Overall, they contribute nearly £700 million to regional GDP. At expected growth rates of 8% per annum, this could potentially increase to £1.2 billion by 2005.

2.2.1. The Environment Industry in the South West

Comparable data is unfortunately not available at the regional level to provide a direct comparison of the South West’s environment industry with the precise definition of the sector used at an EU level. Regional data for the private sector is however available from the Environment Business Directory for 1999 which allows an estimate of the number of firms and employees in the environment sector to be derived. The Directory contains nearly 180 entries for businesses in the South West. These account for over 30,000 jobs. Environmental businesses with fewer than 40 employees account for over 60% of the total number of firms in the South West. Overall, they contribute nearly £700 million to regional GDP. At expected growth rates of 8% per annum, this could potentially increase to £1.2 billion by 2005.

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2.2.2. The Environment Industry in the South West

The Directory contains nearly 180 entries for environmental businesses in the South West. These account for over 30,000 jobs. Environmental businesses with fewer than 40 employees account for over 60% of the total number of firms in the South West. Overall, they contribute nearly £700 million to regional GDP. At expected growth rates of 8% per annum, this could potentially increase to £1.2 billion by 2005.

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Excluded from the data are the services provided by local authorities and NDPBs (non-departmental public bodies). Some NDPBs, such as the Environment Agency and English Nature, are included below in the analysis of the natural environment sector (see Section 2.7).

Box 2.1 Wessex Water: Committing to Sustainability

Wessex Water provides water services to 1.2 million people and waste water services to 2.5 million people in five counties across SW England. The company is included in our assessment of the environment industry presented above. In addition to providing services which directly protect and improve the environment in the SW, Wessex Water is going further and, in 1997, made a commitment to become a sustainable operation. Its first sustainability report, ‘Striking the Balance 1998’, was published in 1998, and it plans to report annually on progress. The company is working on a reporting framework which will assess its impact on the environment in a holistic way and include the social aspects of its operations. The company currently reports on water services, energy and transport and has recently introduced a new Environmental Action Plan.

Environmental management and audit

The EU’s Environmental Management and Audit Scheme (EMAS) is a voluntary scheme aimed at improving the environmental performance of companies by ensuring that they adopt environmental management systems. These systems provide a structured framework for businesses to assess and reduce their impact on the environment, and for companies to improve their environmental performance.

From a business viewpoint many large companies now have dedicated environmental departments, while smaller companies are also embracing environmental management. This can lead to substantial cost savings, adding impetus to current trends.

2.3.1. Environmental Management in the South West

The EU’s Environmental Management and Audit Scheme (EMAS) is a voluntary environmental management and audit scheme. It introduces a new Environmental Action Plan and promotes the adoption of environmental management systems by businesses. The scheme covers businesses with 10 or more employees and requires them to report annually on their environmental performance.

Environmental change indicator

The scheme helps businesses to identify and address environmental issues, and to develop new processes and systems to improve their environmental performance. The scheme is also expected to lead to increased public awareness of environmental issues.

2.3.2. Environmental Change Indicator

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A certification scheme which provides firms with a mechanism for monitoring and improving their environmental performance. Five large companies have EMAS certified sites in the SW, nearly 10% of the 61 registered sites in the UK as a whole.

Larger firms only account for a small proportion of business activity in the region and other initiatives to encourage more environmentally friendly practices by SMEs have been explored further in the regional context.

Green Business Clubs are local fora for small and medium-sized enterprises which meet to exchange experience and provide advice on environmental best practice. Horizon SW acts as a regional co-ordinator for the numerous clubs and networks in the SW region, some of which are listed in Box 2.2.

Recognition of the benefits of adopting best practice - particularly cost savings, which ultimately increase business competitiveness and value added for the region - has seen the development of networks and partnerships which aim to promote new ideas, share experience, and disseminate technological know-how.

**Box 2.2 Environmental Networks and Business Clubs in the SW**

- Avon and Somerset Energy & Environment Management Group
- Business Environment Association Bath & District (BEAB)
- Cotswold Energy & Environmental Management Group
- Devon & Cornwall Energy & Environmental Management Group
- Devon Environment Business Initiative (DEBI)
- Gloucestershire Green Business Club
- PAYBACK Environmental Business Association
- South Wessex Waste Minimisation Group
- Swindon Chamber of Commerce Environmental Business Club
- The Somerset Waste Minimisation Group
- Wessex Environment Business Club
- Wessex Energy & Environmental Management Group
- Western Environment Business Forum (WEB Forum)

PAYBACK was the first UK initiative to pioneer waste minimisation for SMEs and is still considered to be one of the most successful in the country. PAYBACK reports that:

- between 1996 and 1998, more than 60 companies achieved savings averaging over £1,000 per employee, with greater achievements expected with the extension of six groups in locations from Bath to Land’s End;
- potential savings from the waste minimisation programme are in the order of £8.3 million, and this could be equated with preserving or creating more than 230 jobs.

The Environmental Technology Best Practice Programme, run by ETSU on behalf of the DTI, has 21 participants in the South West region. On average, companies participating in the Programme save one fifth of their energy costs and one quarter of their waste costs. This tends to equate to about 4% of the companies’ turnover. To illustrate the significance of this, it is estimated that the environmental best practice programme represents 0.7% of the Gross Domestic Product (GDP) of the SW region, which accounted for 4.3% of the total GDP of the UK. This figure is significant when compared to the average of 0.5% for other industrial regions.

There is significant potential for further development of renewable energy sources in the UK, particularly for wind energy in which the region has a natural competitive advantage. The wind energy industry in the UK is a small but growing source of employment, with a workforce of over 2,000.

The Non-Fossil Fuel Obligation (NFFO) is a small but growing source of employment in the UK, with a workforce of over 2,000. The Wind Energy Technological Best Practice Programme provides support to the development of renewable energy sources in the region and is significant for future employment.

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A number of studies have been carried out to assess the potential for renewable energy sources in the region and the key findings are presented below.

- Wind energy produced on land not protected by landscape designations such as AONBs in Cornwall could be almost doubled from 32MW in 1996 to 70MW over the next 10-15 years. Other sources of renewables could practically increase this level of provision to 100MW, i.e., 15% of the county's 1993/4 electricity supply.

- Similarly in Devon, accessible renewable resources could provide 15-20% of the County's electricity supply within the next 10-15 years.

- In an assessment of the agro-industrial and economic factors affecting energy crops in the SW3, a potential 300-500 MW of electrical generating capacity could be fuelled by energy crops in Devon and Cornwall. Competition with other land uses and transport considerations are likely to limit the development of energy crop fuelled generating plant to 30-50 MW of installed capacity over the next 20 years.

Box 2.3 demonstrates how achieving the potential capacity for wind energy in Cornwall and from energy crops in Devon and Cornwall could create an additional 9,000 jobs in the region.

According to National Wind Power Ltd and SWEB, the existing five wind farms in Cornwall have a total installed capacity of 32MW and supply 3% of domestic electricity demand. A general rule of thumb for wealth creation is that a 10MW wind farm will bring in approximately £7.5 million to the region, of which approximately 25% will be invested locally as land rents, local materials, and jobs during construction. Transient opportunities are likely to bring the economic benefits with other land uses and energy crops in Devon and Cornwall.

A SW property development project could be funded by the government to develop renewable energy resources. This would demonstrate how renewable energy could be an opportunity for businesses involved in energy efficiency and emissions reductions in line with international climate change commitments.

In addition to increased energy production, the potential to create an additional 9,000 jobs in the region.

### Table 2.2 The South West's Share of NFFO-5 for Renewable Energy Sources, 1998

<table>
<thead>
<tr>
<th>Type of project</th>
<th>Number of projects</th>
<th>Generation capacity (MW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landfill gas</td>
<td>5</td>
<td>28.7</td>
</tr>
<tr>
<td>Municipal and industrial waste</td>
<td>3</td>
<td>7.5</td>
</tr>
<tr>
<td>Municipal and industrial waste with combined heat and power</td>
<td>4</td>
<td>4.2</td>
</tr>
<tr>
<td>Small scale hydro</td>
<td>5</td>
<td>0.52</td>
</tr>
<tr>
<td>Large wind</td>
<td>1</td>
<td>42.7</td>
</tr>
<tr>
<td>Small wind</td>
<td>2</td>
<td>175</td>
</tr>
<tr>
<td>Total in England and Wales</td>
<td>16</td>
<td>85.45</td>
</tr>
<tr>
<td>Total in South West</td>
<td>4</td>
<td>42</td>
</tr>
<tr>
<td>Total in England, Wales and South West</td>
<td>20</td>
<td>131.85</td>
</tr>
</tbody>
</table>


---

The proposed EC Directive on Landfill will require the UK to reduce significantly the amount of biodegradable waste going to landfill. The Directive sets out a timetable for stringent reduction targets. This has implications for the South West, as it does for the rest of the UK and the EU. The UK is amongst the top 5 EU Member States where the majority of waste is disposed of to landfill.

Table 2.3 presents figures for the SW which show that, on average, local authorities dispose of 90% of household waste by landfill. Much work still needs to be done to assess the contribution of various waste disposal options to landfill.

2.5 WASTE MANAGEMENT

**Recycling in the South West:**

The Recycling Consortium is a not-for-profit company based in the CREATE centre in Bristol. It promotes community-based waste reduction, re-use and recycling in Bristol, South Gloucestershire, North and North East Somerset, South Somerset, North and South East Devon, and Dorset.

Friends of the Earth have estimated that a 40% recycling rate in the UK would create 2,450-11,550 extra jobs; with greater job creation potential if other wastes and composting schemes are considered. Based on this, we have estimated that achieving the same target in the SW could create an additional 675 jobs in the region (see Box 2.5).

**Table 2.3 Landfilling of Household Waste in the South West**

<table>
<thead>
<tr>
<th>Local authority</th>
<th>Volume of waste collected (tonnes)</th>
<th>Proportion of waste landfilled (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath &amp; NE Somerset Council</td>
<td>79,340 (1)</td>
<td>82</td>
</tr>
<tr>
<td>Bournemouth Borough Council</td>
<td>98,713</td>
<td>100</td>
</tr>
<tr>
<td>Bristol City Council</td>
<td>175,000 (1)</td>
<td>93</td>
</tr>
<tr>
<td>Cornwall County Council</td>
<td>217,000</td>
<td>94</td>
</tr>
<tr>
<td>Devon County Council</td>
<td>374,522</td>
<td>85</td>
</tr>
<tr>
<td>Dorset County Council</td>
<td>194,300 (1)</td>
<td>67(1)</td>
</tr>
<tr>
<td>Gloucestershire County Council</td>
<td>220,000</td>
<td>90</td>
</tr>
<tr>
<td>Plymouth City Council</td>
<td>104,646</td>
<td>90</td>
</tr>
<tr>
<td>Poole Borough</td>
<td>76,900 (1)</td>
<td>80(1)</td>
</tr>
<tr>
<td>North Somerset Council</td>
<td>102,000</td>
<td>93</td>
</tr>
<tr>
<td>Somerset County Council</td>
<td>240,000</td>
<td>90</td>
</tr>
<tr>
<td>South Gloucestershire Council</td>
<td>126,530(1)</td>
<td>95</td>
</tr>
<tr>
<td>Swindon Borough Council</td>
<td>47,000</td>
<td>92</td>
</tr>
<tr>
<td>Torbay Borough Council</td>
<td>60,000</td>
<td>89</td>
</tr>
<tr>
<td>Wiltshire County Council</td>
<td>186,700</td>
<td>95</td>
</tr>
<tr>
<td>Total/average</td>
<td>2,302,651</td>
<td>89%</td>
</tr>
</tbody>
</table>

Notes:
- (1) Data refers to 1997/98
Sustainable Transport

The Job Creation Potential of Recycling in the South West

The Government’s recently published White Paper on sustainable transport, ‘A New Deal for Transport’ recognises the important role transport plays in supporting a strong and prosperous economy and in improving the quality of life. It also recognises that transport policy in the past has been driven by a short-term focus on meeting the growth in demand for transport and in improving the performance of the transport system. The paper argues that a New Deal for Transport is necessary to ensure that transport is sustainable and that it supports a strong and prosperous economy and a high quality of life.

The work of the Recycling Consortium is nationally recognised and it currently receives funding from DETR and DEFRA to develop a local recycling strategy for the region. This work includes the development of a toolkit for other regions and local authorities to help them develop community-based actions to reduce and eliminate the amount of waste that goes to landfill.

The Consortium is also assessing the development of an eco-industrial park in Bristol to reprocess newspaper, plastics, textiles and glass. It is estimated that there is potential for a further 2-3 such parks in the region, which would require an additional 675 jobs. Achieving these targets requires an estimated 598,000 tonnes of household waste, potentially creating an average of 2,450-11,550 extra jobs (average 7,000 jobs).

Examples of initiatives to stimulate more recycling by householders are provided in Box 2.6.

The forecast growth on rural roads in the South West is provided in Table 2.4. This shows that annual traffic growth rates are expected to exceed the UK average of 160% by 2025 in the absence of measures to discourage further growth. The Council for the Protection of Rural England (CPRE) has produced a report which focuses on rural roads in the South West and is considering the development of an eco-industrial park in Bristol to reprocess newspaper, plastics, textiles and glass.

The South West

<table>
<thead>
<tr>
<th>County</th>
<th>1995 traffic breakdown</th>
<th>2025 forecast</th>
<th>Increase in rural road traffic in 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avon</td>
<td>850-1,349</td>
<td>1,995</td>
<td>146%</td>
</tr>
<tr>
<td>Bath and NE Somerset</td>
<td>&lt;850</td>
<td>1,224</td>
<td>141%</td>
</tr>
<tr>
<td>Devon</td>
<td>850-1,349</td>
<td>2,075</td>
<td>136%</td>
</tr>
<tr>
<td>Dorset</td>
<td>&gt;1,850</td>
<td>2,995</td>
<td>200+%</td>
</tr>
<tr>
<td>Somerset</td>
<td>&gt;1,850</td>
<td>3,495</td>
<td>191%</td>
</tr>
<tr>
<td>Wiltshire</td>
<td>&gt;1,850</td>
<td>3,695</td>
<td>191%</td>
</tr>
</tbody>
</table>

1. Defined as all non-built up C roads and unclassified roads.
3. Examples of initiatives to stimulate more recycling by householders are provided in Box 2.6.
4. The Council for the Protection of Rural England (CPRE) has produced a report which focuses on rural roads in the South West and is considering the development of an eco-industrial park in Bristol to reprocess newspaper, plastics, textiles and glass.

The Job Creation Potential of Recycling in the South West

The Government’s recently published White Paper on sustainable transport, ‘A New Deal for Transport’ recognises the important role

The Government’s recently published White Paper on sustainable transport, ‘A New Deal for Transport’ recognises the important role
The findings from the RSPB survey

The natural environment sector includes all economic activities that involve the protection and enhancement of the natural environment. A recent study by the RSPB has assessed the economic importance of this sector in the South West region. This study surveyed a wide range of organisations involved in the protection and enhancement of the natural environment, including government agencies (such as the Environment Agency and English Nature), non-governmental organisations (NGOs) (such as the British Trust for Conservation Volunteers and the Wildlife Trusts), local authorities and private companies. The key findings from the survey are as follows:

- The natural environment sector employs about 1 in 1,000 people in the region;
- The sector directly employs about 1,201 FTE (Full Time Equivalent) people;
- There is estimated to be a contribution of £26 million per annum on environmental expenditure on the protection of the natural environment.
- Directly, and approximately 67 FTE in total.
- The project demonstrates that the natural environment sector is a significant contributor to the regional GDP (see Section 2.8).

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it spends nearly £30 million of which £18 million is spent within the region. In addition, the range of activities undertaken by The National Trust in the South West directly and indirectly supports 5,130 FTE, generating an estimated output of £113 million to the regional economy.

The two National Parks in the South West - Dartmoor and Exmoor - and 10 of the 12 AONBs for which data is available directly employ some 200 people and jointly spend over £6.7 million per annum on projects to conserve and protect the natural and built environment, and promote and manage sustainable tourism and recreation. In addition, volunteer days in the two National Parks and the Cotswold AONB alone are the equivalent of a further 40 FTE. Moreover, the management of these protected areas lever new money into the region. National Parks and AONBs together bring in substantial amounts of European Regional Development Funds (ERDF), Lottery, Millennium and MAFF's Environmentally Sensitive Areas (ESAs) spending to the area by providing core funding or project management by core staff.

2.7.1. The Voluntary Sector and Conservation

The South West also has a very active voluntary environmental sector. This includes both volunteer inputs to maintaining and protecting the region’s natural and built environment in protected areas and along the coastline, and attracting conservation volunteers into the region. As well as contributing to the quality of the region’s environment, the latter also creates employment and income opportunities in the region and helps to diversify traditional tourism sectors (see Section 4). The economic contribution of the voluntary sector has been estimated for the following case studies (Box 2.8) and is included in the summary of economic benefits in Section 2.7. The economic sectors (see Section 4) are also an important part of the region’s environmental, heritage and industrial tourism and employment opportunities. In the region’s national and built environment, the region’s natural and built environment and the region’s rural and built environment, the region’s natural and built environment and the region’s rural and built environment, and the region’s natural and built environment and the region’s rural and built environment. This includes the beach, the South West also has a very active voluntary sector.

Box 2.8 The value of voluntary activities in the natural environment:

**BTCV Conservation Working Holidays**

British Trust for Conservation Volunteers is a national organisation running conservation working holidays/weekends throughout the UK. Volunteers pay a small fee to go on a holiday. Volunteer work is on environmental projects.

Income from volunteers on schemes in the South West is 100% retained in the region’s economy. Some is retained by BTCV. However, a large proportion is passed on to local accommodation providers and spent on local produce and services. Total expenditure by volunteers in 1997/8 was just over £1 million.

- 31,266 volunteers provided 15,980 work days;
- the value of the volunteer labour, using DETR’s estimated value of £46 per day, is £735,000;
- additional spending by the volunteers on local services of £239,700, assuming an average spend of £15 per day (based on South West Coast Path analysis).

**Beach Watch '97**

Reader’s Digest Beach Watch is a practical conservation initiative, organised by the Marine Conservation Society with sponsorship from Reader’s Digest. Launched in 1993, it aims to raise awareness about the problem of marine and coastal litter, monitor levels and sources of litter on Britain’s beaches and encourage action to reduce marine litter. The programme’s objectives are to monitor trends in litter levels and sources of litter on beaches in the region, and increasing the public’s awareness of the importance of marine litter. Beach Watch data from 1997 is included in this section.

- 508 volunteers cleaned litter from 42 of South West Region’s beaches over 2 days (1 weekend). This represents a 24% increase on the 1996 data. The project has taken place each year for the last 7 years, and the number of volunteers and beaches cleaned is increasing each year.

The outcome is a cleaner image for the area, with knock-on effects for the region’s tourism sector, increased public awareness of the region’s environment, the region as a whole, the region’s economic benefits, and the region’s natural and built environment.

**Coral Cay Conservation Sub Aqua Club**

The Coral Cay Conservation Sub Aqua Club was formed 8 years ago, mainly as a result of the annual Isles of Scilly expedition, which received substantial funding from English Nature. The Club undertakes trips, typically over 2 weeks, to carry out survey work in and around the archipelago. A few examples of projects include surveys of the health of seagrass ([Zostera marina](https://en.wikipedia.org/wiki/Zostera_marina)) beds and the production of a photographic collage of the region’s coral reefs. The Club undertakes projects of this type, which include substantial sources of the health of seagrass ([Zostera marina](https://en.wikipedia.org/wiki/Zostera_marina)) beds and the production of a photographic collage of the region’s coral reefs.

Furthermore, the project has taken place each year for the last 7 years. The number of volunteers and beaches cleaned is increasing each year. The outcome is a cleaner image for the region, with knock-on effects for the region’s tourism sector, increased public awareness of the importance of marine litter, and the region’s natural and built environment.

**Box 2.8.8. The value of volunteer activities in the natural environment:**

**BTCV Conservation Working Holidays**

British Trust for Conservation Volunteers is a national organisation running conservation working holidays/weekends throughout the UK. Volunteers pay a small fee to go on a holiday. Volunteer work is on environmental projects.

Income from volunteers on schemes in the South West is 100% retained in the region’s economy. Some is retained by BTCV. However, a large proportion is passed on to local accommodation providers and spent on local produce and services. Total expenditure by volunteers in 1997/8 was just over £1 million.

- 31,266 volunteers provided 15,980 work days;
- the value of the volunteer labour, using DETR’s estimated value of £46 per day, is £735,000;
- additional spending by the volunteers on local services of £239,700, assuming an average spend of £15 per day (based on South West Coast Path analysis).

**Beach Watch '97**

Reader’s Digest Beach Watch is a practical conservation initiative, organised by the Marine Conservation Society with sponsorship from Reader’s Digest. Launched in 1993, it aims to raise awareness about the problem of marine and coastal litter, monitor levels and sources of litter on Britain’s beaches and encourage action to reduce marine litter. The programme’s objectives are to monitor trends in litter levels and sources of litter on beaches in the region, and increasing the public’s awareness of the importance of marine litter. Beach Watch data from 1997 is included in this section.

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Furthermore, the project has taken place each year for the last 7 years. The number of volunteers and beaches cleaned is increasing each year. The outcome is a cleaner image for the region, with knock-on effects for the region’s tourism sector, increased public awareness of the importance of marine litter, and the region’s natural and built environment.
with the Marine Conservation Society’s SEASEARCH project and assisted in surveys of the Dorset coast. In both 1997 and 1998, 15 volunteers stayed for between 3 days and 2 weeks. 1997 figures were the same. Approximately £4,500 was spent in the local area, excluding volunteers’ own expenditure on items such as tourist gifts, food and drink etc.

2.8 SUMMARY OF REGIONAL ECONOMIC BENEFITS

The quantitative data presented in this section has been analysed to identify the level of employment associated with the specific activities examined, and their contribution to regional GDP. A summary of the key findings is provided in Table 2.5 and Box 2.9. This is based on readily available information and only covers a small part of the wider range of businesses and activities which make up the South West’s environment sector.

Table 2.5 shows that the current economic benefits from some of the environment-related activities examined provide around 38,000 FTE jobs in the South West and add almost £835 million to regional GDP. It has also been possible to qualitatively assess the growth potential in a number of these areas where there are opportunities for developing and expanding emerging industries and these are summarised in Box 2.9.

Box 2.9: Projections of Economic Benefits in the Environment Sector

Section 2.2: Environment Industries
- Rapid growth in industries providing environmental goods and services is expected to increase the value of this sector from £700 million at present to £1.2 billion by 2005.
- Section 2.7: Natural Environment Sector
- Increasing recycling activities to achieve a 40% reduction in the amount of waste sent to landfill will create 9,000 local/regional jobs in the next 10 years.

2.9 SUMMARY OF REGIONAL ECONOMIC BENEFITS

Table 2.5: Current Economic Benefits of the South West’s Environment Sector

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employment Expenditure Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment Industries</td>
<td>31,555</td>
</tr>
<tr>
<td>Natural Environment Sector</td>
<td>6,330</td>
</tr>
<tr>
<td>Total</td>
<td>37,885</td>
</tr>
</tbody>
</table>

Assumptions:
1. Based on average GDP/worker of £22,000 pa
2. Includes RSPB findings and National Trust data

The qualitative data presented in this section highlights the potential for economic benefits and growth in the environment sector. The South West continues to be a leader in environmental education and awareness, with numerous projects and initiatives taking place to reduce waste and conserve natural resources. The sector is expected to continue to grow, providing employment opportunities and contributing to the region’s GDP.
3.1 INTRODUCTION

Some sectors which have been reliant on natural resources and the environment such as agriculture and sea fisheries are in decline both nationally and in the South West, particularly in the more rural areas in the west of the region. A number of initiatives at national, regional and local level are using environmental programmes as a driver for regeneration and development across these declining primary sectors. This section highlights the importance of some of these programmes and initiatives, and focuses on three areas of opportunity where diversification of the traditional resource base illustrates possibilities for the way forward:

■ agriculture (Section 3.2);
■ regional produce and countryside products (Section 3.3);
■ forestry (Section 3.4).

These areas can lead to the joint production of commercial outputs and environmental attributes. The economic benefits from the examples included are summarised in Section 3.5. Many other initiatives in these three areas could be reviewed and included in the analysis. Furthermore, the scope of the analysis could be widened to explore the benefits from activities which seek to diversify economies in other sectors such as, for example, sea fisheries.

Tourism also plays a key role in the diversification of the economy and is discussed in Section 4.

3.2 AGRICULTURE

Agriculture is a significant sector in the South West's economy. It accounts for almost 4% of regional GDP compared with 2% for the UK as a whole. Agriculture occupies more than three quarters of the region's total land area. Current pressures and future developments in this sector thus have significant implications for much of the South West's valued habitats and landscapes.

Continued decline in agriculture will have significant economic, social and environmental impacts. Declining farm incomes and employment add to the pressures already facing the west of the region, particularly in the more remote rural areas. Unemployment and out-migration will further reduce the viability of remote rural areas and the provision of rural services and facilities. Continued or further intensification of farming, or indeed land abandonment in marginal areas, will have significant economic, social and environmental impacts.

Decline in the agricultural sector is a function of agricultural policies which have been provided in the past, changes in agriculture's role within the European Community, and the impact of the BSE crisis. The impact of the BSE crisis has also been acute in the South West where livestock farming predominates.

Future reform of the CAP is high on the EC agenda and is expected to shift the emphasis further away from production support, with the likelihood of farmers receiving payments for acting as environmental guardians. A larger proportion of EU funding in rural areas will be focused on rural development and environmental projects, rather than agricultural production and major infrastructural programmes.

This section considers the role of agri-environment schemes in supporting farmers and providing environmental benefits, the opportunities from organic farming and the potential for further benefits from expansion, and the benefits from developing regional branding and encouraging local purchasing networks.

3.2.1 Agri-Environment Schemes

Agri-environment schemes provide payments to farmers to improve the environmental performance of farming or to maintain traditional, environmentally-friendly forms of land management. They are an important mechanism in seeking environmental gain and thereby maintaining the viability of existing and new farm businesses, and in providing new opportunities for organic farming and the development of environmental schemes supportive of the agenda.

Networks and partnerships between farmers and others will be an important factor in the success of agri-environment schemes. The UK's agricultural sector programmes and national environmental policies, therefore, need to be developed and linked.

In addition, the emphasis on rural development and environmental protection in the EU's CAP should be reflected in such schemes to ensure that they are effective in promoting the goals of the CAP and contribute to the protection of the environment. The agri-environment schemes must be designed to encourage farmers to adopt environmentally-friendly practices and to maintain or enhance the natural beauty of the landscape.

These schemes can lead to the joint production of commercial products and environmental attributes. The economic benefits from the examples included are summarised in Section 3.5. Many other initiatives in these areas could be reviewed and included in the analysis. Furthermore, the scope of the analysis could be widened to explore the benefits from activities which seek to diversify economies in other sectors such as, for example, sea fisheries.
farms, encouraging diversification and creating new jobs in the wider economy. Current information shows that over 7,000 agreements under the various agri-environment schemes available have been entered into in the South West, although a small proportion of farmers may be participating in more than one scheme. These agreements cover some 225,000 hectares, equivalent to 12% of the South West’s agricultural land area (1.8 million hectares). The model for organic food is growing rapidly.

### Organic Farming

Box 3.1 Economic Impacts of Agri-Environment Schemes

**Countryside Stewardship Scheme**

A national study undertaken by Safe Alliance has demonstrated the potential for job creation through the Countryside Stewardship Scheme. This found the potential for creating 13,052 person years of employment from placing 30% of agricultural land nationally under the Countryside Stewardship Scheme.

In a study undertaken by Safe Alliance, 3 the potential for job creation through the Countryside Stewardship Scheme was assessed. This study found that placing 30% of agricultural land under the scheme could create 13,052 person years of employment.

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Applying the above analysis to the 27,935 hectares of land in the Countryside Stewardship Scheme in the South West provides 17 FTE jobs in the region. This includes jobs sustained in addition to direct and indirect jobs created.

Further extrapolation to the total land area under various agri-environment schemes in the region (223,920 ha) indicates an associated employment level of 134 FTE. Increasing the proportion of land under environmental management from 12% at present to 30% (ie 540,000 ha) would create an additional 190 FTE jobs.

### The Economic Impact of Environmentally Sensitive Area Schemes in the South West

Studies of ESA Schemes in the Somerset Levels and Moors and West Penwith show significant economic benefits to the agriculture sector. For the Somerset Levels and Moors, farmers would experience an average net income loss of £82 per hectare if they were to leave the ESA. Full time employment would fall by 28% and part-time employment by 20% in the absence of ESA. There would be a 9% increase in casual employment.

For West Penwith, farmers would experience an average net income loss of £63 per hectare if they were to leave the ESA.

### 3.2.2 Organic Farming

The market for organic food is growing rapidly. Over the last nine years, sales of organic food in the UK have more than doubled from £63 million in 1997 to £260 million in 1999. By 2002 the UK is expected to pass £400 million. Over the last nine years, sales of organic food in the UK have more than doubled from £63 million in 1997 to £260 million in 1999. By 2002 the UK is expected to pass £400 million.

Organic farming contributes to sustainable development by delivering economic, environmental and social benefits. The labour requirements under organic farming methods are higher than under conventional farming. The labour requirements under organic farming methods are higher than under conventional farming. The labour requirements under organic farming methods are higher than under conventional farming.

The overall costs of managing an organic farm are higher than those of managing a conventional farm. However, the higher costs are offset by the benefits of increased biodiversity, improved soil quality, and reduced use of synthetic chemicals.

Organic farming contributes to sustainable development by delivering economic, environmental and social benefits. The labour requirements under organic farming methods are higher than under conventional farming.

### Table 3.1 Expenditure and Uptake of Agri-Environment Schemes

<table>
<thead>
<tr>
<th>Scheme</th>
<th>No. of Agreements</th>
<th>Area (ha)</th>
<th>Annual Payment (£000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countryside Stewardship Scheme</td>
<td>1,517</td>
<td>27,935</td>
<td>3,164</td>
</tr>
<tr>
<td>Environmentally Sensitive Areas</td>
<td>3,878</td>
<td>175,000</td>
<td>11,973</td>
</tr>
<tr>
<td>Habitat Scheme</td>
<td>150</td>
<td>2,590</td>
<td>-</td>
</tr>
<tr>
<td>EN Management Agreements</td>
<td>475</td>
<td>15,490</td>
<td>932</td>
</tr>
<tr>
<td>EN's Wildlife Enhancement Scheme</td>
<td>118</td>
<td>2,905</td>
<td>283</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6,138</strong></td>
<td><strong>223,920</strong></td>
<td><strong>16,352</strong></td>
</tr>
</tbody>
</table>

Employment is attributable to both the production processes used and new kinds of on-farm activities such as processing and direct sales. Increased revenue from price premiums on organic food also help to maintain employment and increase farm incomes.

In the South West, there is almost 13,500 ha under organic farmland. At only 0.7% of the utilised agricultural area, there is significant potential for expansion. At the same time, interest in organic farming in the SW is high. The Organic Conversion Information Service, funded by MAFF, receives its largest number of enquiries from farmers in the South West (28%), compared to any other region in England and Wales. Furthermore, the characteristic farm types in the region - small scale, low production intensity, mixed grass-based enterprises - are well suited to organic management, and increased employment.

The Soil Association has recently completed a feasibility study which evaluates the opportunities for expansion of organic farming in the South West's Objective 5b region (Cornwall and parts of Devon and Somerset). The regional marketing opportunities are also explored, seeking to increase the amount of added value which takes place within the region. The study identifies some important barriers to developing organic farming in the region, including investment and infrastructure barriers and the availability of information and advice on conversion.

The objectives of the proposed programme are:

- To double the number of organic farmers and organic farmland in the region;
- To increase the proportion of product where added value takes place in the region;
- To develop supply chains for livestock, dairy and crops;
- To increase employment.

The study concludes that the proposed programme has the potential to create 157.5 FTEs and sustain 86 FTEs.

### Examples from Two Farms

- **Eastbrook Farm near Swindon** is a 1,336 acre farm that was put under organic conversion in 1984. The farm enterprise has diversified substantially and has a successful meat processing and marketing business. Employment has increased from 2 family workers and 4 full-time staff before conversion to 11 full time staff on-farm and a further 12 at the Eastbrook Farm Organic Meats business.

- **Manor Farm in Dorset** is a 270 acre farm which converted to organic production between 1984 and 1988. It has dairy, ewes, feed wheat, straw and wheat reed operations and also processes its own milk in addition to milk from other farms in the locality. Since conversion, staff levels have increased from 2 to 5.6 FTEs.
Using the environment to brand the region

3.3. Using the environment to brand the region

Landscape value by controlling the spread of gorse

Traditional extensive stocking methods are an

South Wales.

Retail process and by giving a coherent and

farm by taking control of the whole production and

intermediate brand and image. The business, which is

increasing the margin of profit and turnover of the

rearing of native breeds of cattle (such as the South

National Park, is concerned with the breeding and

products locally and across the south of England and

Devon and the Welsh Black), and the sale of beef

Wild Beef

quality and flavour.

Produce from Cornwall was seen to be associated

more established Jersey Royals brand, at 47%.

initial demand figure is almost as high as for the

vegetables if they saw them at point-of-sale. This

consumers would buy the Cornish King branded

Cornish King has a significant input in keeping a

name is getting stronger in a number of markets.

More than 60 growers are currently involved.

approximately 50% public and 50% private sector

Cornish King as a brand name. The project receives

The main crops are early potatoes, cauliflower and

spring greens. Not all supermarkets take every crop

The main crops are early potatoes, cauliflower and

The University of Plymouth Business School has

Environmental improvements

models and real traffic and their associated

Environmental benefits from producing food

through increased local sourcing by

Through increased local sourcing by

The University of Plymouth Business School has

the potential to achieve regional integration

Cornish King is a registered trademark,

launched in May 1996 with the aim of promoting

Cornish produce market share with the multiple

retailers and in helping to maintain the volume of

Cornish King as a brand name. The project receives

funding.

The Soil Association (1998) The Potential for Local Purchasing in Mid-

4

In West Country Business Guide: Special Publication (1998), by West

2


3

1

The University of Plymouth Business School has

environmental impacts.

not only the demand from the food industry, but also

more established Jersey Royals brand, at 47%,

Retail process and by giving a coherent and

farm by taking control of the whole production and

increasing the margin of profit and turnover of the

rearing of native breeds of cattle (such as the South

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In West Country Business Guide: Special Publication (1998), by West

A government supported initiative, Taste of the

West Country potato market in under two years.

Taste of the West, focuses on specialist, high value added

sectors such as meat, fish, dairy, bakery and other

brands for local products with a positive image of very fresh food, excellent

quality and flavour.

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more established Jersey Royals brand, at 47%.

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The Soil Association (1998) The Potential for Local Purchasing in Mid-

In West Country Business Guide: Special Publication (1998), by West
results and the more successful schemes, such as 'Business Match' set up by Bristol City Council, may provide ideas for the type of approach which works well. One local purchasing initiative, the Dartmoor Direct Initiative, helps local farmers develop new markets locally by encouraging them to use the Internet to market their produce directly to hotels and homes.

### 3.3.3 Countryside Products

A recent study and initiative by the Countryside Commission has sought to establish whether there is a market for 'countryside products' in the UK. According to their definition, these are products which originate from environmentally responsible land management and which can encourage local economic activity or a sense of regional identity. Such products might include traditional breeds and crops, organic produce, and regionally branded products. The study found an increasing interest in such products both from consumers and retailers, and a greater presence of the types of farm produce which would qualify for a countryside product label and associated premium in the South West than any other part of the country.

### 3.4 FORESTRY

Forestry offers many opportunities for economic benefits from the sector itself and associated upstream and downstream activities. Opportunities exist in relation to the management of existing woodlands and new planting. The Government's new forestry strategy for England explicitly recognises the wide range of economic, environmental and social benefits which forests and woodlands can provide (see Box 3.4). Forestry can help to diversify and support farm incomes and create jobs in rural economies. The South West region has a greater woodland cover (10% of the land area) than the UK average (7.5%). The region includes two of Britain's 12 Community Forests - the Forest of Avon and the Great Western Forest - and one of Britain's largest and finest multi-purpose forests, the Forest of Dean. The Woodland Grant Scheme (see Table 3.2) provides £3.3 million per annum in grants from the Forestry Commission to nearly 15,000 hectares of new planting in the SW region (see Table 3.2). Some 223,982 hectares of new planting in the SW region (see Table 3.2) have been approved in all, indicating that the Woodland Grant Scheme is supporting forestry planting. The Government's new forestry strategy highlights the potential for increasing quality and scale of woodland and forest plantations in the region. Much of this is supported by EU funding and the South West region is a key area for new planting. The Woodland Grant Scheme and Farm Woodland Premium Scheme are available to farmers and other landholders and, in addition to the direct economic benefits, can help to diversify and support farm incomes and create jobs in rural economies. These include:

- **Economic benefits**:
  - can provide a policy framework for the sustainable management of existing woodlands and woodlands which provide economic benefits, including job creation and income generation.
  - can help to diversify and support farm incomes and create jobs in rural economies.

- **Social benefits**:
  - can help to diversify and support farm incomes and create jobs in rural economies.
  - can help to diversify and support farm incomes and create jobs in rural economies.

- **Environmental benefits**:
  - can help to diversify and support farm incomes and create jobs in rural economies.

Some £3.3 million per annum in grants from the Forestry Commission is supporting nearly 15,000 hectares of new planting in the SW region (see Table 3.2). Some 223,982 hectares of new planting in the SW region (see Table 3.2) have been approved in all, indicating that the Woodland Grant Scheme is supporting forestry planting. The Government's new forestry strategy highlights the potential for increasing quality and scale of woodland and forest plantations in the region. Much of this is supported by EU funding and the South West region is a key area for new planting. The Woodland Grant Scheme and Farm Woodland Premium Scheme are available to farmers and other landholders and, in addition to the direct economic benefits, can help to diversify and support farm incomes and create jobs in rural economies.

### 3.3.3.1 Table 3.2 Grant Support to the Private Sector 1997/98

<table>
<thead>
<tr>
<th>Area</th>
<th>No. of approvals</th>
<th>Area covered (ha)</th>
<th>Total cost (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severn Wye and Avon Conservancy</td>
<td>223</td>
<td>9,845</td>
<td>1.2</td>
</tr>
<tr>
<td>West Country Conservancy</td>
<td>350</td>
<td>5,000</td>
<td>2.1</td>
</tr>
<tr>
<td>Total</td>
<td>573</td>
<td>14,844</td>
<td>3.3</td>
</tr>
</tbody>
</table>

Source: Forestry Commission (1999), personal communications.
The SW has 186,000 hectares of forest cover; England has 990,000 hectares of

Box 4.1

The Forest of Avon is one of 12 Community Forests
which combine to form the country’s largest
Community Forest.

Economic Benefits of the Forest of Avon

Economic impacts on the Forest of Avon
are presented below.  There are many others in
the South West, for example Woodworks
and the character of the countryside is maintained
safeguarded as timber supplements farm incomes
and enhanced.  New activities such as craft
industries and green tourism would generate
additional employment.

During the 10 years of the project, the
Working Woodlands Initiative has studied
the small woodlands sector...Indirect
employment in SW Forest timber-related
industries is estimated at about 2,700 jobs.

The project aimed to improve the management of neglected
woodlands, in terms of access, recreation,
environmental education events and also carries
environment and the economy:

The Working Woodlands Initiative

Woodlands and Forests: linking the
environment and the economy:

Forest of Avon


Development Initiative.


Working Woodlands (Issue 6, Winter 1998)  Revitalising the South West’s
Forests.

Economic Benefits of the South West Forest

In the rural economy of £2.7 million per year.
A previous study in 1987 estimated that there
was a £1.5 million per year income in the
entire small woodlands sector.  The
Working Woodlands Initiative has now
studied the small woods sector in detail...Indirect
employment in SW Forest timber-related
industries is approximately 900 jobs, the
projected increase would make a substantial
contribution.

Working Woodlands directs investment and training
throughout rural Cornwall, Devon and Somerset...
and other forest-related businesses.

Forestry sector of 120,698 employees.

This includes a total of 10 small woodlands sector.

West Cornwall 1995 of England’s forest cover.


New planting adds to existing employment
opportunities in the forestry sector as new
forests are planted.  Enhanced rural

Working Woodlands is a £4.2 million programme

The SW Forests project area covers a total of 280,000
hectares and is located entirely within the boundary
of the Objective 5(b) programme area.  The project
aimed to improve the management of neglected
woodlands and develop new or traditional
uses forestry planting and management as a catalyst
for positive land use change, and to stimulate other
department or key to-day forest management
practices.  In addition, the wider benefits of all
forest resource within the region.


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In the rural economy of £2.7 million per year.
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practices.  In addition, the wider benefits of all
forest resource within the region.


Working Woodlands (Issue 6, Winter 1998)  Revitalising the South West’s
Forests.

Economic Benefits of the South West Forest

In the rural economy of £2.7 million per year.
A previous study in 1987 estimated that there
was a £1.5 million per year income in the
entire small woodlands sector.  The
Working Woodlands Initiative has now
studied the small woods sector in detail...Indirect
employment in SW Forest timber-related
industries is approximately 900 jobs, the
projected increase would make a substantial
contribution.

Working Woodlands directs investment and training
throughout rural Cornwall, Devon and Somerset...
and other forest-related businesses.

Forestry sector of 120,698 employees.

This includes a total of 10 small woodlands sector.

West Cornwall 1995 of England’s forest cover.


New planting adds to existing employment
opportunities in the forestry sector as new
forests are planted.  Enhanced rural

Working Woodlands is a £4.2 million programme

The SW Forests project area covers a total of 280,000
hectares and is located entirely within the boundary
of the Objective 5(b) programme area.  The project
aimed to improve the management of neglected
woodlands and develop new or traditional
uses forestry planting and management as a catalyst
for positive land use change, and to stimulate other
department or key to-day forest management
practices.  In addition, the wider benefits of all
forest resource within the region.


Working Woodlands (Issue 6, Winter 1998)  Revitalising the South West’s
Forests.
An environmental initiative. The project covers an area of 220 square miles in and around Bristol and aims to plant 6,500 ha of new woodland, increasing woodland cover from 5% to 27% of land area over the next 40-50 years. Project initiatives focus on multi-purpose use of woodland creation, including improving access, recreation, habitat value and landscape quality. Some achievements since 1991 include nearly 2,000 ha of woodland brought under management, 45 km of hedgerows created or brought under management, and public access to over 900 ha of new woodland.

In addition to the direct economic benefits to the forestry sector and wood-related industries, the project represents a substantial investment in improving the quality of life and image of the area for attracting new business opportunities. Expenditure for 1997/98 totalled £163,489. A substantial proportion of expenditure from other bodies is also attracted to the area, including Single Regeneration Budget, Community Forest Conservation Grants and Forestry Commission grants. This further expenditure was around £95,000.

3.5 SUMMARY OF REGIONAL ECONOMIC BENEFITS

Table 3.3 and Box 3.6 set out the current and forecast economic benefits from regenerating the primary sector.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employment Expenditure Output</th>
<th>FTEs (cm) (£m) (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 3.2: Forestry</td>
<td>143.1</td>
<td>57</td>
</tr>
<tr>
<td>3.4 Forest of Avon</td>
<td>20 (9)</td>
<td>0.3</td>
</tr>
<tr>
<td>4.5 SW Forest</td>
<td>203</td>
<td></td>
</tr>
<tr>
<td>4.7 Woodlands</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>4.8 Woodland Schemes</td>
<td>28 (2)</td>
<td></td>
</tr>
<tr>
<td>3.4 Forest of Avon</td>
<td>3.3</td>
<td></td>
</tr>
<tr>
<td>3.3 All Environmental</td>
<td>16.3</td>
<td></td>
</tr>
<tr>
<td>3.2 Agriculture</td>
<td>9</td>
<td>2.9</td>
</tr>
</tbody>
</table>

Assumptions:
(1) based on average GDP per worker of £22,000/worker
(2) based on average GDP per worker of £22,000/worker
(3) based on agri-environment scheme experience
(4) based onWorking Woodlands average experience

The projections show that the creation of jobs in these types of activities is likely to be of high economic value and that much of the job creation in these types of activities is likely to be of high economic value. They therefore contribute to wider diversification, improving the quality of life and image of the area for attracting new business opportunities.

Table 3.3: Current Economic Benefits from Regenerating the Primary Sector

<table>
<thead>
<tr>
<th>Activity</th>
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<tr>
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<td>3.3</td>
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</tr>
<tr>
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<td>16.3</td>
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4.1 INTRODUCTION

In addition to the environment sector (Section 2) and traditional land based economic sectors (Section 3), high quality environments are increasingly recognized as a crucial, but less tangible capital asset for other economic sectors such as tourism. The role of a high quality environment in attracting inward investment to the region, and in attracting regional businesses from the major cities to provincial and rural towns is also increasingly recognized.

This section explores the contribution that a high quality environment makes to:

- the tourism sector (Section 4.2);
- film and media (Section 4.3);
- inward investment (Section 4.4);
- quality of life benefits for residents (Section 4.5).

Finally, Section 4.6 summarises the economic benefits from those activities where the part the environment plays in supporting these wider sectors can be quantified.

4.2 TOURISM

Tourism is one of the fastest growth sectors in the world today, continuing to grow 4% pa despite recession in many other sectors. It is the world’s largest employer and, if not already, is expected to constitute the world’s largest industry by the end of the century. Not surprisingly the sector has been embraced as an engine of economic growth and regeneration by many regions and countries. The UK has enjoyed an even faster rate of growth at around 5% per year, with 26 million overseas visitors in 1997, spending in excess of £12 billion.

Regionally, tourism is a key sector in the economy of the South West, attracting more than 21 million visitors each year and contributing £3.5 billion to the region’s GDP.

The region attracts 17% of domestic tourist spending (greater than any region other than Scotland). At present, tourism in Cornwall employs about 20,000 people, and in some parts of the coast, over 30% of households are engaged in tourism related employment. A recent study undertaken as part of the South West Coastal Path project placed the economic impact of the South West’s tourism industry at £3 billion.

The South West Coastal Path project was established to develop a quality coastal environment and to promote tourism in the region. A number of studies have attempted to evaluate the economic impact of the strong tourism-environment linkage in the South West. A study of the economic impact of the South West’s tourism industry revealed that the project brought in thirty times more income into the region than the annual costs of maintaining it.

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4.1 The Importance of the Environment to the SW
Box


1

4.2 Complementary Tourist Attractions
Box

2


440 FTE jobs within Cornwall and 880 in South West

£74mn, it is the largest

The Eden Project

The development of larger tourist attractions in

the region.  In addition to the wide range of

tourist activities available in the

region in 2001.  The Eden Project, which is due to open in 2001, is

£74mn, it is the largest

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The development of larger tourist attractions in

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The Eden Project
sustainable tourism activities to develop more business associations to other green and environmental business associations and public bodies such as the National Parks and historic towns are under pressure in the region that some particularly attractive landscapes. The need for sustainable tourism management and promotion is essential to maximise the viability of rural and coastal areas. The challenge is to harness the positive impacts of tourism (jobs, income, infrastructure and maintaining the viability of rural and coastal areas) whilst managing to minimise, or avoid, all the negatives. There have been a number of projects involving public bodies such as the Tourism Boards and private operators and business associations to either green traditional tourism activities or to develop more sustainable tourism products for the region.

### Film and Media

The film and television industry is attracted to the location of the South West due to its historical landscape, rugged coastline, stately homes and as a ‘nice place to work’. The South West Film Commission promotes and assists film making in the region. It has estimated that, during the 1997–1998 period, approximately £14 million was brought into the region, amounting to the generation of some 65 local jobs.

### Greening Traditional Tourism in the SW

- **Farm Tourism**
  - The West Country Tourist Board is on the point of introducing a streamlined incentive scheme for improving the farm tourism businesses by developing their uniqueness. Funds are available for up to one third of the cost of the project. The minimum project will be £600 and the maximum is £6,000. Final approval for the scheme is awaited from MAFF. In addition, Farm 2000 is a farmer-backed marketing project which has been set up to promote the farm tourism sector.

- **Green Audits**
  - The West Country Tourist Board has been the lead Regional Tourist Board in promoting the Green Audit Kit approach to individual tourism initiatives. In 1992, South Devon developed and piloted a methodology for applying this to small tourism businesses as a national demonstration project. This resulted in the ‘Green Audit Kit’, a self-manual of advice and practical action. This was piloted, evaluated, revised and finally published in a national form and promoted to tourism businesses across England from 1996. Sales and use of the Green Audit Kit increased from 150 to over 300 businesses by mid-1996. An award scheme has been developed which recognises and rewards practical action by users.

- **Developing Links between Rural and Urban Areas**
  - Bristol and its associated hinterland is a unique and increasingly popular destination for visitors. In October 1998 a report for Bristol City Council entitled *Sustainable Tourism in Bristol: Local Opportunities* highlights the potential for this type of urban tourism. This included promotion of ‘weekend short breaks’. This project has ERDF funding. In addition, a KONVER 2/Bristol and Bath 2000 initiative is a jointly managed programme, marketing both cities, with a campaign to promote the South West as one of the sub-regions where environmental impacts will be minimised. This is part of the poster initiative of the West Country Tourist Board.

### Tourism Initiatives

#### National Marine Aquarium in Plymouth

- **Objective**: The National Marine Aquarium in Plymouth was opened in 1984 and is the largest aquarium in Europe. It displays six habitats from English moorland streams to coral seas. The project is expected to attract more than 600,000 visitors a year and to create 280 jobs. It is a flagship tourist attraction and is expected to expand the range of year-round attractions and encourage visitors to have a ‘weekend break’ in the region.

#### The Lost Gardens of Heligan

- **Objective**: The Lost Gardens of Heligan in Cornwall (285,000 visits in 1997) makes it the 12th in the top admission-charging attractions in the West Country. The ongoing restoration of the Lost Gardens makes it one of the top admission-charging attractions in Cornwall and one of the top admission-charging attractions in the South West. The project is expected to attract 250,000 visitors a year and to create 600 jobs. It is a flagship tourist attraction and is expected to improve the region’s image and to attract more visitors to the South West.

#### 4.3 Sustainable Tourism Initiatives

The SW Tourism Strategy (WCTB) also recognises the need for sustainable management of tourist pressures in the most popular sites. It is recognised that some particularly attractive areas in the region, notably honeypot sites in the National Parks and historic towns, are under pressure and, apart from detracting from the quality of the resource, these can also diminish the quality of the visitor experience. For these areas the tourism objective is therefore not simply to maximise the number of visitors but to encourage more sustainable use. The challenge is to harness the positive impacts of tourism (jobs, income, infrastructure and maintaining the viability of rural and coastal areas) whilst managing to minimise, or avoid, all the negatives. There have been a number of projects involving public bodies such as the Tourism Boards and private operators and business associations to either green traditional tourism activities or to develop more sustainable tourism products for the region.

Some examples are provided in Box 4.3.
However, there is also much indirect spending which filters into the local economy and wider spin-offs to the tourism industry through attracting visitors to specific locations once films and dramas are screened.

Wycliffe has been particularly successful in attracting visitors to the rugged coastline of Cornwall and films such as *Sense and Sensibility* and *Remains of the Day* draw many visitors to the stately homes.

The West of England also has one of the largest media presences in the UK and is the long-established home of the BBC and Aardman Animation. The region supports approximately 300 companies in front-line computer hardware, software and creative development. The West of England has traditionally attracted creative talent on the basis of its quality of life, environment and existing talent base.

"The presence of the BBC’s Natural History Features and Documentaries Unit has acted as a magnet for talent from around the world. The region’s beautiful towns and landscapes have served as locations for a stream of fine feature films."

The Bristol area has long been known as a world player in high quality wildlife and video productions. Aardman Animations alone directly and indirectly supports some 300 local jobs.

Recent research by the following groups supports the above statement:

- Entrepreneurship, Business Growth and Enterprising Behaviour in Rural South West England, University of Cambridge
- The Bristol city area has long been known as a centre of excellence in the field of media and communications software, attracting a host of large and small companies which includes

The West of England Development Agency (WEA) was established in the late 1970s to promote economic development in the West. The Agency is responsible for the size of companies by responding to the needs of businesses and people.

**Investment in the South West**

4.4.2 Changing Investment Patterns Within the Region

A major feature of recent economic growth in the South West region has been a high degree of disparity of economic performance within the region.

A recent report published by the Department of Trade and Industry (DTI) in 1999 highlights the fact that some areas of the region have experienced growth while others have suffered a decline in economic activity.

During the 1990s, the South West region was identified as having a high potential for inward investment due to its attractive location, good quality of life, and a skilled workforce.

The region has a strong focus on developing its creative industries, particularly in areas such as film and television production. The success of film and television productions in the region has been a key factor in attracting inward investment.

The South West region has also benefited from the presence of the BBC’s Natural History Features and Documentaries Unit, which has attracted a significant amount of investment and activity.

In recent years, the region has continued to attract investment, particularly in the creative industries, with major film productions such as *The King’s Speech* and *The Shore* being filmed in the area.

The South West region is also home to a number of major companies, including Aardman Animations and the BBC, which have played a significant role in the region’s economic development.

The future of the South West region is likely to continue to be driven by its strong creative industries, as well as its attractive location and high quality of life.

**Notes**

conurbations and big cities to smaller towns and rural areas. The research indicates that the fastest growth of employment has been recorded in rural and less urbanised areas of Britain. The explanation for why business activity and employment have been growing fastest in rural regions such as South West England has been sought in terms of the advantages rural areas offer for enterprising behaviour by locally founded businesses. This survey based research clearly indicates that an important explanation of why there is a high level of new firm formation in rural settlements and small towns is because this is where the professional, managerial and skilled entrepreneurs wish to live and establish businesses. Many of these entrepreneurs have been drawn to visually more attractive, rural and small town living environments from large cities and conurbations. The importance of environmental attractiveness as a factor in company location decisions is shown in Table 4.1. Whilst this shows that there is a portfolio of factors which need to be taken into account, environmental attractiveness is a key factor for firms in remote and accessible rural areas as well as urban areas. Other important factors for firms in all three location types are nearness to founder’s home and historic reasons.

\[Table 4.1 Reasons for Choice of Company Location\]

<table>
<thead>
<tr>
<th>Reason for Choice of Company Location</th>
<th>Remote</th>
<th>Accessible Urban</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal</td>
<td>37.5</td>
<td>37.5</td>
<td></td>
</tr>
<tr>
<td>Non-formal</td>
<td>6.4</td>
<td>6.4</td>
<td></td>
</tr>
<tr>
<td>Environmental Understanding</td>
<td>35.4</td>
<td>35.4</td>
<td></td>
</tr>
<tr>
<td>Environmental Attractiveness</td>
<td>36.4</td>
<td>36.4</td>
<td></td>
</tr>
<tr>
<td>Company Acquisition</td>
<td>34.5</td>
<td>36.4</td>
<td></td>
</tr>
<tr>
<td>Physically Accessible Urban Area</td>
<td>37.5</td>
<td>37.5</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>24.1</td>
<td>24.1</td>
<td></td>
</tr>
</tbody>
</table>

Environmental attractiveness for founders was environmental for business location decision making. The business survey undertaken for the research study indicates that, for remote rural firms in the South West, the third most frequently reported reason for business location choice was environmental attractiveness for founders and staff (24% of replies). Environmental attractiveness for location choice was environmental for business location decision making. The business survey undertaken for the research study indicates that, for remote rural firms in the South West, the third most frequently reported reason for business location choice was environmental attractiveness for founders and staff (24% of replies).

4.5 QUALITY OF LIFE BENEFITS FOR RESIDENTS

Finally, a high quality environment can be seen to provide a number of less tangible benefits to residents of the Region. It has not been possible to quantify these benefits within the current study. These wider benefits might be characterised as follows:

- Environmental understanding. Natural areas, woodlands and green space in urban and rural areas provide opportunities for learning about nature and for studying human interactions with the natural environment;
- Physical and mental quality of life benefits. Wilder and wooded areas are considered to provide a number of less tangible benefits to residents of rural and small towns. The business survey undertaken for the research study indicates that, for remote rural firms in the South West, the third most frequently reported reason for business location choice was environmental attractiveness for founders and staff (24% of replies). Environmental attractiveness for location choice was environmental for business location decision making. The business survey undertaken for the research study indicates that, for remote rural firms in the South West, the third most frequently reported reason for business location choice was environmental attractiveness for founders and staff (24% of replies).
Spiritual quality of life benefits which are increasingly considered measurable using new environmental economic valuation techniques such as contingent valuation. These attempt to place a monetary value on public goods such as unspoilt rivers and beaches even where the environment and the economic benefit have been dimensioned and where the link between the economic activity and a high quality environment has been assessed. For example, where people derive a benefit from the very knowledge that wildlife, forests and unspoilt rivers and beaches exist, even if they may not directly visit or use them. These latter values may also be enjoyed by people outside the SW who simply like to know that the remaining relatively wild areas of Cornwall and Devon will continue to exist unspoilt.

4.6 SUMMARY OF REGIONAL ECONOMIC BENEFITS

The ways in which the environment underpins important regional sectors such as tourism and inward investment have been discussed above. However, these wider economic benefits of a high quality environment are not easily quantified without additional primary research. The linkage though is clear.

Table 4.2 includes some examples where the economic activity has a strong environmental dimension and where the link between the environment and the economy has been assessed. For example, whilst it is widely recognised that tourism is strongly dependent on a high quality environment, we have only included the data derived from studies which have specifically assessed the economic impact of the environmental dimension. The analysis does not therefore include the wider, less-tangible benefits which nonetheless constitute one of the SW’s key strengths.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employment</th>
<th>Expenditure</th>
<th>Output</th>
<th>(FTE)</th>
<th>(£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landscape motivated tourism</td>
<td>54,000</td>
<td>1,781</td>
<td>702</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Eden Project</td>
<td>310</td>
<td>4</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aardman Animation</td>
<td>300</td>
<td>6.6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SW film location shots</td>
<td>55</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forest of Dean</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SW coastal footpath</td>
<td>1,281</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land and sea</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>54,665</td>
<td>743.8</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assumptions:

(1) Based on interim findings, average GDP/tourism worker of £13,000. Tourism GDP per worker is derived from the South West Coastal Footpath study which indicated that £16 million of output generated 1,226 FTE jobs, namely GDP/worker of £13,000.

(2) Based on average GDP/tourism worker of £22,000.

Economic activity with a strong environmental dimension and where the link between the environment and the economy has been assessed. For example, whilst it is widely recognised that tourism is strongly dependent on a high quality environment, we have only included the data derived from studies which have specifically assessed the economic impact of the environmental dimension. The analysis does not therefore include the wider, less-tangible benefits which nonetheless constitute one of the SW’s key strengths.
5.1 SUMMARY

This section summarises the key findings of the Prospectus in relation to the economic benefits of environment-related activities. Particular opportunities for mutually compatible economic development and environment enhancement and protection are highlighted. Finally, the ways in which a positive approach to the environment can contribute to economic objectives are summarised. We have used SWERDA's core objectives to structure this summary.

5.1.1 Current Position

We have carried out an initial analysis of a wide range of economic activities which clearly have a positive environmental dimension, and assessed their contribution to employment and regional output. A summary of the analysis is presented in Table 5.1.

We have found that economic activities which have a strong positive link to the environment currently provide some 100,000 FTE jobs in the South West and contribute nearly £1.6 billion to the South West's regional GDP. Employment in these areas accounts for about 4% of total employment in the region and slightly more than 3% of GDP.

The 3% of total output attributable to the environment is a highly conservative estimate and is only based on those activities explored for the Environmental Prospectus and for which quantitative data was available. Taking into account the impact of the environment on the general business community, rural businesses, businesses producing countryside products, and inward investment decisions, it is estimated that a similar additional proportion of economic output is dependent upon the quality of the SW's environment. This information is also presented on page 28.

5.1.2 Future Opportunities

Key features and potential opportunities which emerge from the review of environment-related activities are noted below.

- Many of the sectors are new and growing opportunities.
- Opportunities exist now for the region to place maximum emphasis on the environment-related sector in ways that are already happening in the region (eg environment industries, renewable energy, waste management). Building these opportunities into the economic development model and local sustainable development model and local economic development is a key opportunity.
- Many of the sectors are new and growing opportunities.
- Opportunities exist now for the region to place maximum emphasis on the environment-related sector in ways that are already happening in the region (eg environment industries, renewable energy, waste management). Building these opportunities into the economic development model and local sustainable development model and local economic development is a key opportunity.
- Many of the sectors are new and growing opportunities.

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5.1.3 Summary and Recommendations

A summary of economic benefits from environmental activities presented in Table 5.1.

Table 5.1 Summary of Economic Benefits from Readily Available Information

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employment (FTE)</th>
<th>Output (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 2: Environment Industries</td>
<td>37,885</td>
<td>833</td>
</tr>
<tr>
<td>Section 3: Regenerating the Primary Sector</td>
<td>597</td>
<td>13</td>
</tr>
<tr>
<td>Section 4: Wider Benefits of a High Quality Environment</td>
<td>54,665</td>
<td>744</td>
</tr>
<tr>
<td>Total 93,147</td>
<td>1,590</td>
<td></td>
</tr>
<tr>
<td>South West Economy as a Whole 2,239,000</td>
<td>49,109</td>
<td></td>
</tr>
<tr>
<td>Regional contribution 4.2%</td>
<td>3.2%</td>
<td></td>
</tr>
</tbody>
</table>

Table 5.2 Projections for Growth in Selected Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employment (FTE)</th>
<th>Output (£m)</th>
</tr>
</thead>
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<tr>
<td>Section 2.2: Environment Industries (1)</td>
<td>23,607</td>
<td>367</td>
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<td>Section 2.4: Renewable Energy</td>
<td>12,000</td>
<td>264</td>
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<td>Section 3.2: Organic Farming</td>
<td>158</td>
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<td>Section 3.3: Local Purchasing</td>
<td>2,000</td>
<td>44</td>
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<tr>
<td>Total Projected Economic Benefits</td>
<td>37,765</td>
<td>678.5</td>
</tr>
<tr>
<td>Total Current (Table 5.1) and Projections 130,912</td>
<td>2,269</td>
<td></td>
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<tr>
<td>Regional contribution 5.8%</td>
<td>4.6%</td>
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Note: (1) Incremental based on forecast growth rate

A similar additional proportion of economic output can contribute to employment and regional output as more economic activities which already have a strong positive environmental dimension are developed and utilised. This further emphasises the importance of developing a broader understanding of the economic benefits of environment-related activities within the South West region. This understanding is also presented on page 28.

5.2 SUMMARY AND RECOMMENDATIONS

5.2.1 Current Position

SWERDA's core objectives are summarised. We have used a summary of economic benefits from environmental activities which clearly have a positive environmental dimension, and assessed their contribution to employment and regional output. A summary of the analysis is presented in Table 5.1.

5.2.2 Future Opportunities

Key economic development opportunities abound in the region which can provide mutual benefits to economic development and environment enhancement and protection. Opportunities for mutually compatible economic development and environment enhancement and protection in relation to the economic benefits of environment-related activities are summarised on page 28.
THE ENVIRONMENT SECTOR: c38,000 jobs, c£833 million output

THE ENVIRONMENT INDUSTRY: Firms that provide goods and services which are needed for environmental protection.

ENVIRONMENTAL MANAGEMENT: Use of environmental management systems by businesses to assess and reduce their impact on the environment.

RENEWABLE ENERGY: Wind energy, biofuels and their potentials.

WASTE MANAGEMENT: Recycling, alternative options to landfill.

THE NATURAL ENVIRONMENT SECTOR: Economic activity associated with the protection and enhancement of the natural environment, including wildlife protection, wind energy, and the potential of biofuels.

OTHER SECTORS NOT FULLY EXPLORER IN THIS REPORT, eg, sustainable marine fisheries.

CAPITALISING ON A HIGH QUALITY ENVIRONMENT: c55,000 jobs, c£744 million output

TOURISM: Rural/touristic tourism, sustainable tourism, coast and clean seas.

FILMS & MEDIA: Dedicated regional centres of excellence, quality environments as film locations.

REGIONAL PRODUCE: Using the quality of the environment to brand the region, local purchasing, countryside products.

FORESTRY: Working woodlands, multi-purpose forestry, community forests, the SW Forest Project.

QUALITY OF LIFE FOR RESIDENTS: Links between inward investment and quality of life; benefits of the region's landscape.

INWARD INVESTMENT: Links between inward investment and the quality of life in the region, company location.

QUALITY OF LIFE FOR RESIDENTS: Benefits of the region's landscape.

OTHER SECTORS NOT FULLY EXPLORER IN THIS REPORT, eg, sustainable marine fisheries.

REGENERATING THE PRIMARY SECTOR: c600 jobs, c£13.1 million output

AGRICULTURE & THE ENVIRONMENT: Environmental land management schemes, organic farming.

REGIONAL PRODUCE: Using the quality of the environment to brand the region, local purchasing, countryside products.

ENVIRONMENTAL MANAGEMENT: Firms that provide goods and services which are needed for environmental protection.

THE ENVIRONMENT AND THE ECONOMY IN THE SOUTH WEST

ECONOMIC ACTIVITIES WHICH HAVE A STRONG POSITIVE LINK TO THE ENVIRONMENT IN THE REGION: c100,000 jobs, c£1.6 billion output

OTHER SECTORS NOT FULLY EXPLORER IN THIS REPORT, eg, integrated transport activities.

SIGNIFICANT POTENTIAL FOR GROWTH

SIGNIFICANT POTENTIAL FOR GROWTH

A HIGHLY CONSERVATIVE ESTIMATE: OVERALL THE VALUE OF THE ENVIRONMENT IS IN THE REGION OF 5-10% OF THE SW’S TOTAL GDP.
5.1.3 The Environment - Helping to Meet the economic objectives of SWERDA and others

The Environmental Prospectus describes a wide range of economic activities for which the environment acts as a strong driver for economic growth and regeneration in the region. The implications these have for the economic objectives of SWERDA and others are outlined below.

- **Economic development and regeneration.**
  Many environment-related activities are in the process of rapid growth, and harnessing their full potential can make a significant contribution to economic development. Other activities can help to diversify the economic base in declining sectors, tackle particular pockets of deprivation, and assist people to remain in rural areas to manage the land where falling incomes and employment are a continual threat.

- **Business efficiency, investment and competitiveness.**
  Environmental management measures such as energy efficiency and waste minimisation can lead to significant cost savings for both larger firms and SMEs. Subsequently, this can improve business efficiency, support indigenous business growth and increase regional competitiveness. By the same time, a high quality environment can provide inward investors with the added extra which differentiates the region from others in an economic climate where many other factors are increasingly competitive.

- **Employment.**
  Environmental protection and enhancement are a tool to stimulate the economy, create jobs and preserve existing jobs. The labour intensity of many environment-related activities is compatible with policies to combat high levels of unemployment overall and pockets of deprivation. The likelihood of displacing employment in other sectors is minimal as the activities explored are either in new/growth sectors or contribute to diversification in areas where the risk of unemployment is high.

- **Enhancing and developing relevant skills.**
  Delivering environmental projects requires an extensive skills base with training to allow people to benefit from the opportunities offered. The full range of environment-related activities, from environmentally sensitive land management and environmental auditing to electronic waste management systems, provide opportunities for different skills levels and in different environments.

5.2 **RECOMMENDATIONS**

There are high expectations of our new RDA. We look to SWERDA to improve the performance of the region in GDP and employment terms, but also to enhance the quality of life for everyone in the region. The region’s environment presents a key opportunity to do both. The region’s environment provides a key opportunity to enhance the environment, to stimulate new and existing regional growth and jobs, and to lead the region in environmental action.

We look to SWERDA to improve the quality of life for everyone in the region. We hope that the SWERDA development process will be fully integrated within the region and that the region’s environment will lead by example, sending the right signals to others.

In recognising the role of the environment in economic and ecological regional economic objectives, SWERDA should consider adopting the following aims within its development programmes:

1. **A Regional Development Vision**
   - SWERDA should describe the following aims within its development programmes:
     - recognise and champion the significant positive linkages between the environment and economic development;
     - actively build on the region’s environmental and economic strengths, particularly those aspects which differentiate the SW from the other regions;
     - ensure that other activities and investments in the region are environmentally compatible and do not cause harm to the region’s environmental and economic development potential;
     - recognise and champion the significant environmental, environmental protection, and environmental enhancement opportunities that exist in the region.

2. **Business efficiency, investment and competitiveness.**
   - SWERDA should describe the following aims within its development programmes:
     - recognise and champion the significant positive linkages between the environment and economic development;
     - actively build on the region’s environmental and economic strengths, particularly those aspects which differentiate the SW from the other regions;
     - ensure that other activities and investments in the region take environmental considerations fully into account and do not threaten environment-reliant activities;
     - embrace the environment as an effective and sustainable route for developing the economy and tackling regional economic variation.

In recognising the role of the environment in regional development and setting high standards for others, SWERDA should lead by example, sending the right signals to others.

**Economic development and regeneration.**

The importance of the environment in economic development and regeneration is increasingly recognised. SWERDA could play a key role in ensuring that the environment is not neglected or ignored.

**Economic objectives of SWERDA and others.**

The environmental objectives of SWERDA and others are...
SWERDA should ensure that, in considering the development of rural areas, it fully recognises the opportunity provided by the natural environment, for supporting a diverse, strong rural economy.

5.2.2 Strategic Issues

4 SWERDA should use the work started within Economic Development: In-house expertise and Environmental Management

3 SWERDA should set out how it will assess the baseline environmental quality of the region, and set out in the RES how this can be protected and enhanced by the above actions. Threats and opportunities to the environment should be identified and addressed through the Economic and Environmental Management

1 SWERDA should consider the importance of including environmental considerations in economic development, by ensuring that economic development policies and programmes are consistent with environmental objectives.

2 SWERDA should identify flagship environmental projects in its Regional Environmental Strategy and early programmes to demonstrate the ‘win win’ opportunities available by pursuing environmental and economic objectives together.

10 SWERDA should evaluate the current (and future) challenges that face businesses in the region, and develop support to help them to respond to those challenges and enhance their competitiveness.

5 SWERDA should consider ways in which it can provide incentives within funding programmes and policies to encourage environmental benefits. For example, it could assess the possibilities for providing premium grant rates for projects/programmes which add to the high quality environment.

8 SWERDA should develop its skills strategy in a way that matches the existing and future opportunities offered by the wide range of employment opportunities in the region, and links this to the integration of environmental objectives into the economic development strategy. Skills programmes should include support for environmental management, research and development and should be an important tool for the development of the emerging environmental industries. It can also help to meet the needs of businesses and households of the primary sectors.

12 SWERDA should evaluate the current (and future) challenges that face businesses in the region, and develop support to help them to respond to those challenges and enhance their competitiveness.

4 SWERDA should fully develop its skills strategy to ensure that it meets the existing and future opportunities offered by the wide range of employment opportunities in the region, and links this to the integration of environmental objectives into the economic development strategy. Skills programmes should include support for environmental management, research and development and should be an important tool for the development of the emerging environmental industries. It can also help to meet the needs of businesses and households of the primary sectors.

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In carrying out its activities with respect to the above, the following recommendations are made.

15 SWERDA will need to ensure compliance with statutory requirements in relation to environmental impact assessment (EIA) of developments. In particular, SWERDA should strive to be at the forefront of best practice in relation to the scoping of EIAs and the form of public participation and consultation undertaken.

16 SWERDA should ensure that, in its management and evaluation of structural fund programmes, it maximises environmental benefits. SWERDA should make full use of the guidance and best practice manuals which now exist in relation to programme development, project selection criteria, indicators, monitoring and evaluation of sustainable development (ESD) and the environment (EAV) and waives management fees for small and medium-sized enterprises. A recent evaluation of how English Partnerships (EP) has contributed to development has found that there is considerable scope for improvement in some respects of environmental protection and implementation of obligations and objectives in relation to sustainable development. SWERDA should develop partnerships with other agencies for the environment, and include access to the EP environment fund in the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should seek opportunities to develop partnerships with the environmental sector that are currently not being utilised effectively and include access to the EP environment fund.

17 SWERDA should seek opportunities to develop sections for sustainable development, and ensure that the guidance and best practice manuals which now exist in relation to programme development are fully used by all participants in order to programme development and implementation of environmental protection and implementation of objectives in relation to sustainable development. SWERDA should make full use of the environment fund in the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is necessary. SWERDA should ensure that the current level of provision of environmental infrastructure is not adequate, the investment in environmental infrastructure is ne...
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