



# SWOT and Key Issues

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## CHAPTER 7: SWOT AND KEY ISSUES

### INTRODUCTION

The purpose of the SWOT is to draw together all of the background research and analysis that have been undertaken to prepare the new Programme. This work has drawn extensively on published data, but has also benefited from a number of specially commissioned reports. As a consequence, the SWOT has been able to draw upon a very large pool of data.

The analysis has also been assisted by a number of experts and senior managers, drawn from the public and private sector in Cornwall and Scilly. This has allowed the analysis to be informed by influential strategy documents, such as the County Structure Plan.

In developing a SWOT, a host of issues were examined, and it has proved difficult to limit the number of points that are important in the Cornwall and Scilly context. This reflects the complexity of the problems facing the area. There are very few simple reasons to explain present conditions i.e. there has been no major trauma or shocks to the economy that produced, for example, a catastrophic fall in incomes or employment. Rather, problems have been more pervasive and deep seated, requiring that a range of issues are taken into account in any analysis, i.e. the issues are truly structural.

In the same way that Cornwall and Scilly's difficulties do not stem from one single problem, the opportunities that are available are also diverse – there is no simple fix that will transform the economy. Instead, the situation requires the development of a wide range of opportunities – for people and communities, for individual businesses and for Cornwall as an economy.

### PEOPLE, COMMUNITIES, PLACE, AND ENTERPRISE

In order to cover the broad range of issues, the four elements of the SWOT are presented in relation to people, communities, place and enterprise.

**People** relates to individual citizens – including school students, young people, older people, single parents, ethnic minorities and women.

**Communities** relates to where people live and work, but more importantly to where they relate – their village, town or district, even their street or their immediate neighbours. Communities are the areas or groups where people feel they belong.

**Place** relates both to the built and natural environment, but also to culture and identity, to Cornwall and Scilly collectively.

**Enterprise** relates primarily to business but incorporates all aspects of income and wealth regeneration.

The SWOT has been presented in relation to these themes to ensure that all aspects of Cornwall and Scilly are covered, from the individual citizen to the largest company, from the local neighbourhood, to the area as a whole. The analysis seeks to be comprehensive and inclusive.

### STRENGTHS

Strengths represent the assets of the region. In any area designated for Objective 1 status there is an inevitable tendency to concentrate on the negative. This is misleading, for every area has strengths, even if they are not always recognised.

In the case of Cornwall and Scilly the Environmental Profile highlighted the outstanding environment, and the sheer weight of designations from a range of environmental and heritage organisations clearly illustrates the breadth and depth of this aspect. This is complemented and enhanced by the Cornish language, which brings an additional dimension to the distinctiveness of the area. These factors help to explain the continued popularity of the area as a tourist destination.

Although the coastal environment has been the key component of the tourism industry to date, increasingly it is the combination of the coastal and rural environment that has attracted new and higher spending tourists. For example Cornwall and Scilly have a number of major gardens, some of which have an international reputation. In many senses the Cornwall and Scilly distinctive feature is a

rurality which combines agriculture and fishing as well as an industrial heritage which makes the area unique.

The environment underpins a significant proportion of economic activity in Cornwall and Scilly, notably tourism and agriculture. It is particularly important in the more rural areas, but also plays an important part in relation to the major towns, where the availability of the workforce and attracting higher skilled workforce is influenced by access to the countryside.

A key feature of Cornwall is the ability to support town and country life. People can work and access services in the major towns, while living in or close to outstanding countryside, where unsightly development is limited. The concentration of significant employment in the major towns, reduces pressure for piecemeal development in the countryside, although major sites are still required on access routes.

The Isles of Scilly is a unique asset, combining the individuality of island life, with a microclimate which allows a relatively long season. It makes a not inconsiderable contribution to tourism in the west of the region (where many of the problems are concentrated).

The Conditions of The Region chapter highlighted the strong employment growth throughout the 1990s. This was a result of a large business base, and although many of these are very small business, there is a core of successful businesses where employment has increased. The most notable is the manufacturing sector, where employment has increased, while nationally employment has been declining.

There are a number of sectors where Cornwall has a significant employment and business base i.e. where employment is not dominated by a handful of large employers. These sectors include food, marine engineering and technology, renewable energies and culture and heritage.

There are also a number of smaller sectors which are beginning to emerge and although employment numbers are small, there is considerable potential for growth. These include environment and earth technologies, organics, multi media and the applied arts. A key feature of these new emerging sectors is their linkages to the distinctiveness of Cornwall.

Cornwall has a large business base, and while many of these are very small, and often in low wage or low paid sectors, there is an entrepreneurial base to build upon, albeit technical and management skills may be low in many cases. There is a related issue of raising the confidence and aspirations of many of the one and two person businesses, particularly where they are involved in expert oriented manufacturing or services.

Tourism remains a strength of the area, although it is also associated with some of the difficulties facing Cornwall and Scilly. The scale of tourism employment, however, and its importance to smaller rural communities, continues to outweigh difficulties with regard to seasonality and low wages, although both these issues have to be addressed to develop a sustainable industry. Tourism remains the cornerstone of the economy in a number of the major towns, some of which have national and international reputations. These towns provide considerable employment for local residents, including many people living in the smaller, rural communities.

Another feature which is a major strength in Cornwall and Scilly is the resilience of people and communities, although this is a quality that is difficult to quantify. The traditional industries of farming, fishing and tin mining were never an easy option. In the case of fishing and tin mining, both were dangerous industries that cost many people their lives.

In relation to agriculture and communities dependent on agriculture, the recent difficulties of the sector have accelerated a decline in employment which many communities have had to deal with over many years. The ability of farming related business to survive, sometimes through diversification, is a tribute to a determined wish to remain in farming. This resilience is a major asset, although in future individual energies may be channelled into new business ventures as opportunities in farming itself are likely to be limited.

This resilience also applies to communities. In spite of the low wages and seasonal work, and the lack of opportunities, many people remain linked to their community, and there is a determination amongst

parents in particular, to end the situation where many of the brightest and the best, feel they have to leave Cornwall to develop their career or use their skills.

<b>PEOPLE</b>	<b>PLACE</b>
Resilience of people and their communities	An outstanding coastal environment, agricultural landscape and moorland
School children outperform the national averages on all key measures	An attractive place to live, evidenced by the continual growth in population
A small number of outstanding entrepreneurs	Uniqueness of the Isles of Scilly
Cornwall continues to attract people of working age	A relatively mild climate with long growing season
	A distinctive culture and heritage with a strong sense of place and identity
	The area has a considerable number of areas designated as of special interest by various organisations
<b>COMMUNITIES</b>	<b>ENTERPRISE</b>
Strong sense of communal and County identity	A high number of businesses relative to its population size
A considerable number of smaller communities, with active local parish councils	The County has a large number of manufacturing companies employing a substantial number of people
Strong sense of identity on the Isles of Scilly	Some 1,400 companies employ between 11 and 99 people
Active language, historical and environmental groups	Large and resilient tourism sector
Considerable number of coastal communities based around small scale working harbours	A small number of companies are at the leading edge of their sectors and operate in a global market
	Diverse and resilient agricultural industry

## **WEAKNESSES**

A number of weaknesses have been identified. Many of these are inter-related e.g. the relative dependence on declining sectors, the predominance of low skilled occupations and a high proportion of low paid jobs. They reflect the area's designation as an Objective 1 area. It is important to candidly assess the area in order that those weaknesses that are key constraints to sustainable development can be identified and addressed.

A key feature of Cornwall and Scilly is the extent to which major sectors have been in long term decline and/or transition. This has affected fishing, mining and quarrying, agriculture and parts of the manufacturing sector. The most serious decline has been in agriculture, where the strong performance of the early to mid 1990s has given way to a significant decline in farm incomes. In relation to sectors in transition, the tourism market has changed markedly over the past 20 years, and Cornwall and Scilly have maintained a major industry, but many jobs are low paid and seasonal.

Cornwall and Scilly has an economic structure where the balance is weighted towards sectors in decline, and where growth sectors have under-performed. The area has not seen as a significant growth in finance and business services, a key economic driver in other parts of the U.K.

As consequence of the economic structure, and the absence of a significant advanced producer services sector, the area has not been able to make available the range of employment opportunities

to retain younger people, or attract them back to the region after they have completed higher education.

The evidence suggests that women have been seriously affected by the lack of employment opportunities, and the area is characterised by manufacturing sectors where employment is gender dominated. The failure to develop a strong financial and business service sector, where there is a more appropriate gender balance, has resulted in women in Cornwall and Scilly having more limited opportunities than their counterparts elsewhere in the UK. Access to employment and training opportunities for women is constrained by access to childcare facilities, and this particularly affects smaller communities outside of the major towns.

Seasonal and part time employment are important features of the Cornwall and Scilly. Although such jobs can be valuable additions to household income, seasonal employment has the effect of masking a more serious problem of the shortage of full time jobs. A key weakness is the limited numbers and types of jobs available. A consequence of the incidence of part time and seasonal jobs is the lack of opportunities for many workers to secure full accreditation for their skills or to up-date their skills or have access to some form of progression route. As a result a large part of the workforce do not have sufficient opportunity to access training and improve their skills.

In relation to businesses the combination of limited local markets, distance from major markets, the time and costs involved in travelling to and from the region, along with few sectors where the area has a competitive advantage has resulted in a narrow economic base, with a low skilled, low paid workforce.

These factors play a role in explaining the current situation in Cornwall and Scilly. While the east of the region has reasonable access to Plymouth, and to a lesser extent Exeter, Devon itself is on the periphery of the major UK markets. The west of the region has more restricted access, and the journey times are considerable. Transport is identified by the business community as the single most important issue.

The lack of employment opportunities, and higher skilled and higher paid jobs, has resulted in high levels of unemployment, pockets of severe deprivation, young people leaving the area, and few opportunities for disadvantage groups such as disabled people or lone parents to access opportunities.

Although a rural area, the area has a significant number of medium sized towns, and a number of these have communities affected by high unemployment and multiple deprivation. These communities have problems similar to larger urban areas, and efforts to address these deep seated problems are affected by the limited labour markets and employment opportunities available locally. Transport problems affect the distances that those people without access to a car can travel to take up work. Many of these communities live in areas with poor quality physical environments.

A number of other communities have been affected by a combination of remoteness and poor transport links. These communities are often dependent on agriculture and seasonal tourism, and as a consequence employment opportunities are limited, and household incomes low.

The low income and high unemployment have resulted in a gradual deterioration of services in many communities, particularly the smaller ones, as services such as regular public transport becomes uneconomic or very costly to provide. The Isles of Scilly have distinct problems and weaknesses. They include the cost and quality of services to and from the Isles, and also the lack of affordable housing, communal facilities, and telecommunications facilities.

The key feature of the weaknesses is exclusion – people are excluded from opportunities; communities from services; and enterprises from new and regional and national markets. A key feature of the new Programme will be the drive to create new opportunities.

## PEOPLE

High proportion of the workforce earning very low wages

Limited quality employment opportunities, particularly for younger people

## PLACE

Distance from regional, national and international markets

The transport infrastructure, notably road and rail, is poor in places

Persistently high unemployment, particularly in the west of the region	Limited air links making the area difficult to access for visitors and businesses
Very low levels of activity in two districts – Penwith and Kerrier	Significant areas of brownfield and contaminated land
Seasonal and part time employment prevalent	Uneven distribution of economic prosperity, with problems concentrated in the west
Low levels of attainment regarding lifetime targets, particularly for women	Poor quality town environments
Significant number of people with literacy and numeracy problems	Costs of transport to and from the Isles of Scilly
Lack of new entrants to agriculture	Small farms (only 25% larger than 50 hectares) and field structure limit economies of scale
Low levels of attainment regarding lifetime skills target	
<b>COMMUNITIES</b>	<b>ENTERPRISE</b>
High levels of deprivation in a small number of wards	High proportion of businesses operating in low value added sectors
Limited job opportunities in smaller and remoter communities	Very high proportion of businesses with low turnovers and few sector role models
Some smaller communities closely linked to employment sectors in decline	Limited local markets and insufficient value added to primary produce
Poor provision of key services in remoter parts of the region	Low proportion of employment in higher value added service sector
Limited access in smaller towns and village to suitable childcare facilities	Key sectors in transition
Few opportunities for young people leaves an age gap in the existing population	Poor business to business links with the rest of the region and beyond
	Production tends to be supply driven with limited marketing structure

**OPPORTUNITIES**

Opportunities will be the key source of additional economic benefits and will be the key drivers for the Programme. In Cornwall and Scilly’s case, many of the opportunities will be small or niche opportunities, when compared to larger urban economies. The area will be able to build on the strengths identified earlier, and to take advantage of a wide range of opportunities.

The key opportunities will be driven by changes in skills and competencies, technology and consumer demand. In relation to skills and competencies, there is considerably under-utilised intellectual capital in Cornwall and Scilly. These assets have been under-utilised in the past, and a key aspect of the new Programme will be the creation of support and conditions to allow talented people to realise their potential. The latent talent and skills of local people offers considerable potential in sectors such as green tourism and organic food.

There are a number of distinct people based opportunities. The most significant of these relates to the increasing pool of well qualified people studying at institutions within Cornwall. The forecast for the UK is for more people to go into higher education. Cornwall will share in this increased provision, but the key for regional development will be the opportunity to develop new businesses around higher level skills, and to provide existing and new investors will higher skilled people.

The second opportunity relates to women, where in spite of girls outperforming boys as school, older women have lower skilled and lower paid jobs, and lower levels of economic activity. There are a

number of factors which explain the situation, and addressing constraints and barriers, to allow women to realise their full potential, and make a greater contribution to business life is a major opportunity.

In the case of technology, the Information Society has a host of applications that are particularly relevant to both smaller and more isolated economies.

The most important of these is the development of e-commerce, which can make a contribution towards reducing the distance from major markets (although it only partly deals with this dimension). E-commerce and e-technology are relevant to every type and size of business in Cornwall and Scilly, and persuading companies to embrace the new opportunities will be a central plank in developing a sustainable business base.

The changes in consumer demands applies to areas such as increased interest in heritage and green tourism and can be linked to the opportunity to move away from low value added tourism to a higher quality product, attracting higher spending visitors. Changing consumer demand also applies to environmentally friendly products, and an increasing interest in cultural industries, products and services.

Technology, along with changing consumer demand, is influencing the development of knowledge based industries. Cornwall has the opportunity to build its current knowledge based industries by reinforcing existing networks, taking advantage of the availability of highly qualified younger people, and capitalising on the quality of life in Cornwall and Scilly.

The successful performance of a number of sectors presents an opportunity to further re-inforce the most successful sectors in the economy, and many of these are forecast to continue increasing for the foreseeable future. Key sectors with potential include Marine Technology; Renewable Energies; Culture and Heritage; Food; Environment and Earth Technologies; Organics; Multi Media and the Applied Arts.

These changes in consumer demands also relate to, and affect, the citizens of Cornwall. There is a greater interest in training and skills, and more effective provision to allow people to take up learning. This is again, linked to the new Information Technology, and a University would both provide comprehensive coverage, but also act as a regeneration catalyst. There is also a greater interest in community participation, and taking responsibility, for the vitality and future on their neighbourhood, village or town. Many of these opportunities to further capitalise on this energy, stem from projects funded by current European Programmes.

Previous investments are now becoming operational, and number offer considerable further opportunities. This includes for example, the RATIO centre of local IT centres, as well as a number of major tourist investments. These will play an important role in improving the product.

## PEOPLE

Increased pool of people with higher level qualifications from Cornwall based institutions

Previously untapped potential of women

Further development of existing e-networks

Skills and capital of in-migrants

Ratio and cignet networks

## COMMUNITIES

Further development of LEADER experience and 5b investments

e-access to facilitate community services and

## PLACE

Growth in environmental activities

Environmental, heritage and cultural tourism, food products and other locally branded products and services

Capitalise on the harbour and port infrastructure for leisure and commerce

Development of a University to provide high quality education, and contribute to a new and positive image and act as a focus for economic regeneration

## ENTERPRISE

Development of key manufacturing sectors and clusters

The Information Society – capitalise on the

enterprises	information/knowledge based economy to build an export oriented service sector
Development of the social economy to improve rural services	Higher value added tourism and sector differentiation
Culture and heritage as a regeneration tool for smaller rural communities	Value added from primary produce
	Capitalise on the major 5b investments
	Greater use of technology and E-commerce allowing companies to reach new markets and overcome geographical isolation
	Increasing demand for cultural industries and products/services

## THREATS

Threats are a more difficult category to accurately assess, as a judgement has to be made about things that could happen, as distinct from things will happen. In the case of Cornwall and Scilly, threats include a continuation of present trends and a deterioration of current conditions.

The continuation of present conditions, particularly in relation to limited opportunities, presents a long-term threat. There are increasing expectations in all sections of society as to the level of opportunity and services that should be available as of right - for residents, visitors and businesses. The danger for Cornwall is that a growing number of all three groups will opt to live, trade or spend their leisure time elsewhere, unless there is a marked improvement in the social and economic prosperity of the area.

A failure to reduce the number of excluded people remains a major threat, as this would undermine the development of Cornwall and Scilly as a modern prosperous economy, offering the best of town and country. This is not about the image of Cornwall, but the reality. If quality of life factors are to be an important aspect of a revitalised Cornwall and Scilly, the significant level of economic and social exclusion has to be reduced.

This threat is also link to the danger in failing to improve the skill and competencies of the economically active. All of the forecast for future demand for labour indicates an increasing demand for more skilled people, and falling demand for lower skilled people. Given current skills levels, a failure to address this problem will result in a weakening of the company base.

Any deterioration in the transport services will be major set back for the business sector in particular, and the ability of the area to secure a step change, is closely linked to the ability of the existing business base to grow. Access to and from the region remains a prime concern for the business community in Cornwall and Scilly. The growth of low costs airlines operating from the regional airports the UK, planned improvements to the West Coast rail line in England, the introduction of new high speed rolling stock on the main networks will further highlight the long journey times needed to access Cornwall and Scilly. There is a danger that while in other regions access to major markets becomes faster and cheaper, Cornwall stands still.

A failure by sectors in transition to adapt to new conditions remains a potent threat. Industries such as agriculture and fishing are going through a period of fundamental change. Although there is always likely to be some agriculture and fishing employment in Cornwall and Scilly, the scale of employment and income is dependent on the adaptability of those involved.

A related threat will come from a failure to continually improve competitiveness. Many industries are being affected by the increasing pace of change and new factors such as e-commerce. Many competitors will still be able o benefit from closer physical proximity to markets, access to better quality facilities and a wider pool of labour. It is important therefore that companies in Cornwall anticipate and embrace change, rather than react to it. A failure to embrace and anticipate change may lead to companies in Cornwall and Scilly falling behind their competitiveness from other regions.

Cornwall remains vulnerable to a further downturn in its fortunes, particularly if the decline in traditional industries is not arrested, and more importantly, if the existing business base fails to understand the need to seize new opportunities before competitors from other areas do.

<b>PEOPLE</b>	<b>PLACE</b>
Unemployment increases	Loss of air links and/or deterioration in Penzance-London rail link
Gap between workforce qualifications with other region widens	Continued deterioration of the built environment of key towns and loss of economic vibrancy
Better qualified and young people continue to leave	Unplanned development leads to environmental loss
Number of excluded people increases	Erosion of distinctiveness and environmental quality
Continued drift from the land	Failure to meet EU Waste Management and Water Directives
	Reduction in the transport services to the Isles of Scilly
	Increased competition from other regions
	Environmental interests stifle sustainable economic development
	<b>COMMUNITIES</b>
Deterioration in service provision to smaller communities	Increased competition for tourist and leisure market
Out-migration increases amongst young people	E-commerce further reduces service provision in Cornwall
Increase in excluded groups, particularly in areas/neighbourhoods that are already disadvantaged	Impact of CAP decline in agriculture and fishing continues or accelerates
Life on the Isles of Scilly becomes unviable except for a rich elite	Potential and appropriate investors attracted to other UK regions
	Withdrawal of business to other UK regions
	High value of pound undermines international competitiveness of manufacturing companies and agricultural production
	Perceived over regulation and cost of compliance

## KEY ISSUES

There are a number of key issues that run throughout the SWOT and that must be addressed in any new Programme. These relate to the complex linkages between strengths and weaknesses and threats and opportunities. Tourism for example is an obvious strength. Yet at the same time an over dependence on this sector, where variation in activity from year to year can be influenced by factors outside the control of the industry, can also be perceived as a weakness.

This also applies to opportunities and threats. Information technology is a major opportunity, yet it also poses a major threat. While Cornwall and Scilly hopes to benefit from new developments, the new technology also allows services to be provided to Cornwall and Scilly from a distance, such as telephone banking. To this extent, information technology is a double-edged sword.

The analysis indicates a need to anticipate change, to react to new developments quickly. This applies in the business context, as much to traditional industries, as to new sectors. It also applies to people and communities. Many of the weaknesses and threats will only be addressed through people and communities within Cornwall and Scilly taking control and responsibility for their own development.

There are a number of broad themes than can be drawn from the SWOT. These themes cover both needs and opportunities. In summary, they represent the building blocks for a holistic approach to the social and economic regeneration of Cornwall and the Isles of Scilly.

Increase the skills and competencies of people – skill and competencies have to be improved to contribute both to business competitiveness and to allow individuals to access new and better paid employment opportunities. It is in the interest of both the company and the individual to secure a step change in attitudes to, and take up of, learning opportunities.

Developing The Potential Of All Of The Community – although an Objective 1 region, with associated problems in terms of levels of economic activity and prosperity, there are a number of success stories with regards to both sectors and individuals. These represent an asset and an opportunity. There is scope however to further develop the potential of both owners and managers of smaller businesses, and of women. With regard to women, increasing activity rates and removing barriers to opportunity will be a major element of any strategy to increase incomes. A further group with under-developed potential are those people in the area's higher and education facilities. Encouraging people to stay and work in Cornwall, and employers to make use of this talent will be another important dimension of the regeneration strategy.

Developing the business base is based around two themes. The first is competing for a share of opportunities open to all, such as information technology and e-commerce. The second theme builds on areas where Cornwall has an advantage - its robust manufacturing base, the large number of small and medium sized companies and sectors where Cornwall and Scilly has a genuine comparative advantage such as agri-environmental businesses.

Developing the business base is fundamental to the creation of new and additional wealth. Put simply, Cornwall and Scilly requires more jobs and better jobs if many of the weaknesses and threats are to be addressed. This emphasis on the business base explicitly recognises that while the public sector can help to facilitate wealth creation, it is the private sector that will take the risks, compete in the marketplace, and ultimately secure sustainable improvements in the wages and incomes for citizens of Cornwall and Scilly.

Adjusting to new economic conditions – the agricultural and fishing sector are adjusting to new economic conditions. The success to which individuals owners and managers adapt will determine the long term future of the industries. This is critical to many of the smaller communities. It has however wider significance given the important role that agriculture plays in manufacturing the landscape which underpins other economic activity, including tourism in a number of the major towns. This adjustment is relevant to both town and country, and any deterioration in the physical environment will have knock on effects in other sectors such as green tourism.

A related theme is opportunity from new investment, and this includes attracting inward investors and possible new investments such as a University or a Rail Freight terminal. The opportunity also exists to capitalise on previous investments, such as the Eden project, and existing facilities/assets such as the airport and upgraded transport links to the Isles of Scilly. This theme links into a number of other areas such as the need to create new and better paid jobs, and to look outwards to the regional and national economies.

This theme is driven by the deep seated nature of the difficulties facing Cornwall and Scilly. The step change needed to improve the area's relative economic position requires a number of significant developments, both to secure substantial numbers of new jobs, but more importantly to act as a catalyst for the wider business community. Flagship projects that place Cornwall and Scilly at the leading edge of developments are especially important in putting to rest the "poor relation" syndrome that undermines the confidence of both people and businesses.

The environment and culture are both strengths and opportunities. They link to a number of other areas - including employment in smaller rural communities, the need to move into new and higher

added value segments of the tourism market, to promote local food and other 'green products', and as key components of the background that makes Cornwall and Scilly a pleasant place to live and work.

Although perceived as a "soft" area, in the case of Cornwall and Scilly it is the environment and culture that underpins considerable economic activity. It is also an area with enormous growth potential, and where Cornwall actually has a significant comparative advantage over other regions. As important, the assets are spread throughout the area, and are not concentrated in one or two favoured towns or villages. This gives the environment and culture the potential to deliver benefits to all parts of the area – rural and towns, coastal and inland.

Another theme is disadvantaged communities and access to opportunity. In any Objective 1 area, there is inevitably a higher level of disadvantage. Cornwall has an unusual set of circumstances that means addressing both rural and urban type problems has to be a priority. The underlying philosophy is that the creation of new opportunities will be of limited benefit to certain groups in society unless steps are taken to identify those excluded from opportunities, and then to take pro-active support to address barriers and constraints.

Cornwall and Scilly have communities that are disadvantaged through concentrations of deprivation, and other communities where the concentrations are less intense, but where additional factors, such as physical isolation, or poor public transport limit access. This theme is clearly linked to a number of other activities including opportunities offered by lifelong learning and the traditional industries of agriculture and fishing, important sources of employment for rural communities.

These broad key areas or issues that have to be addressed cannot be looked at in isolation from other factors. In all cases, an assessment will have to be made of the necessary infrastructure required, the business development support needed, the community capacity building, the training and HRD dimension, and the need to change attitudes and culture. Taking each of these themes and making something happen will involve a broad range of organisations working in partnership.