

Preferred Strategy Report

Island Plan Review - Technical Evidence Base



**ISLAND PLAN
REVIEW**



Government of
JERSEY

Island Plan Review

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1. Background and purpose
 - 1.1. The next Island Plan is important for Jersey: it will set out how we can best manage the development that the island needs to create homes; support the economy; provide for a good family and community life; and protect our environment. It will also serve to protect and enhance what's special about Jersey, as well as begin to plan for the long-term challenges such as climate change.
 - 1.2. Normally the Island Plan would provide a ten-year planning framework but current circumstances make it difficult to plan for the medium- or long-term. It's presently difficult to know, with any degree of certainty, what the impact of the coronavirus pandemic and Brexit will be for Jersey. Because of this, the new Island Plan will cover a shorter three-year plan period 2022-2024, after which, a new longer-term ten-year plan will be put in place.
 - 1.3. At this stage in the review there is a need to establish the parameters of the new Island Plan. Key to this is establishing a planning assumption to determine how many people the new Island Plan needs to make provision for: this is not about setting a new migration or population policy for the island but setting out a reasoned justification for how much development the island needs having regard to what we know now.
 - 1.4. This preferred strategy, therefore, sets the parameters and strategic direction for the new Island Plan. It includes the high-level vision for the plan; its strategic policy framework; the recommended spatial strategy for development; the planning assumption; and analysis of housing need and delivery. Its development has been based on the Island Plan Review Strategic Issues and Options consultation (undertaken in 2019); a wide range of recent technical studies and existing evidence; a collaborative review of the policies and performance of the 2011-2021 Island Plan; and extensive and on-going political and stakeholder engagement.
 - 1.5. The preferred strategy has been sponsored by the Minister for the Environment and has been endorsed by the Council of Ministers.
 - 1.6. The preferred strategy will form part of the evidence base for the new plan and will, along with draft Island Plan, will be open to scrutiny and independent examination.
 - 1.7. The draft Island Plan is scheduled to be published for 12 weeks consultation in March 2021; and approved by the States Assembly – following an independent inspection – early in 2022.

2. Structure and content

2.1. The Preferred Strategy is set out in several sections, as set out in the table below.

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3. Vision and strategic purpose of the bridging Island Plan

A unique context

- 3.1. Planning is about creating a better future and ensuring our island environment is protected for future generations. Each Island Plan plays a central role in determining the future of Jersey and the bridging Island Plan, proposed for 2022-24, will be no different.
- 3.2. The bridging Island Plan needs to look backward, to understand what has worked well and less well and the land use challenges and issues that have arisen in the last ten years. It needs to look forward to the strategic long-term requirements of the Island and set a vision of a sustainable future. It also needs to provide a policy response to the forthcoming period of significant and unpredictable change, in which economic instability is likely to occur alongside the social, emotional and wellbeing legacy of the Coronavirus pandemic and the impact of changed local and global norms.
- 3.3. The bridging Island Plan is a unique response to a unique context. It is intended to make progress in key policy areas in a period of widespread uncertainty.
- 3.4. Like all Island Plans, the bridging plan will be prepared to exacting standards, with extensive research and wide-ranging public, political and stakeholder engagement and consideration. The changed context does not mean that corners will be cut and does not undermine the legitimacy of the significant conclusions that the plan will have to reach in order to balance the future economic, environmental and social needs of the island. It is an Island Plan in the full sense – prepared in accordance with the law and best professional practice.
- 3.5. At this time, when there is real uncertainty, it would be wrong to delay the introduction of a new Island Plan just as it would be wrong to make, with undue certainty, a plan for the next ten-years.
- 3.6. The bridging Island Plan is the right plan for Jersey now. It provides a unique opportunity to ensure policies are attuned to the post-pandemic response and recovery period, and to prepare strong, ambitious foundations for the Island's next long-term Plan, from 2025.

Sustainable wellbeing

- 3.7. Jersey is one of only a small number of jurisdictions across the world that have made an explicit and binding commitment to promote wellbeing in all their actions. Sustainable wellbeing is an holistic concept that uses different tools to measure how well society is doing across the key areas that contribute to overall quality of life. It focuses on long-term progress rather than short-term intervention, and measures community, environmental and economic wellbeing.
- 3.8. The Island Plan shapes the places that promote good health and wellbeing; defining how people live and travel; where they work and learn; and determines the quality of the built and natural environment that all islanders share. The plan deals with both the direct and

indirect land use implications of change and sets out a means to balance competing needs and objectives.

- 3.9. The majority of people surveyed in Jersey support focusing the Island Plan on promoting sustainable wellbeing¹. This will require the plan to have intrinsic sustainability objectives, each of which are interdependent and need to be brought forward in a carefully balanced and mutually supportive way, around the following themes:
- community – seeking to protect and enhance the quality of people’s lives and of the island’s cultural heritage and identity
 - environment – seeking to protect and enhance the quality of Jersey’s urban, rural and marine environments and biodiversity
 - economy – seeking to maintain and enhance the performance of the local economy

Vision for the bridging Island Plan

- 3.10. Achieving sustainable development – to support the sustainable wellbeing of islanders – provides the overarching strategic purpose for the bridging Island Plan.
- 3.11. Specifically, the bridging Island Plan promotes sustainable development in order to maintain and enhance a vision of Jersey as:

A special place, that faces the future; values and protects its environment and unique island identity; and acts with confidence to create the homes and jobs that sustain family and community life.

- 3.12. This vision is informed by the strategic purpose of the Island Plan; the ambitions set by ministers in the Common Strategic Policy and other key strategic plans; the findings of key public and stakeholder consultations including Future Jersey; and in particular the emergent work of the Island Identity Policy Development Board².
- 3.13. The vision is aspirational, but also practical. To meet the vision the bridging Island Plan will need to make policy choices to address short term challenges and to create the foundations for the sustainable long-term development of the island.

¹ Strategic Issues and Options Consultation – findings report, p.15 -

<https://www.gov.je/SiteCollectionDocuments/Planning%20and%20building/IP-findings%20report-digital%20111219.pdf>

² The [Island Identity Policy Development Board](#) was set up to provide common focal points for our growing and increasingly diverse population, and to help the Island project its unique culture and varied talents as part of a positive and coherent international personality.

4. Proposed strategic policy framework

- 4.1. The Island Plan fulfils both a high-level strategic function; and provides specific spatial provisions and policies that are put into effect through the planning process. The current Island Plan comprises around 150 different policies and proposals.
- 4.2. Strategic polices will be included in the new Island Plan, which guide the wide range of specific policies that follow. These are summarised below and set out in appendix 2.

Addressing our key challenges

- 4.3. The bridging Island Plan is a response to key challenges. These were explored and widely consulted on in the Strategic Issues and Options consultation; are considered through technical studies; and were discussed by States Members during the recent in-committee debate³.
- 4.4. To set out how some of the inevitable tensions might be addressed, the minimum framework for the new Island Plan will need to consider:
 - how to achieve development that contributes to healthier places and communities and a better quality of life for all islanders, including the provision of and access to green space
 - how to respond to the climate emergency
 - how to protect and enhance the character of the island's coast and countryside, its biodiversity and cultural heritage
 - how and where we should provide new homes; and how to ensure the provision of homes that meet the demands and expectations of modern life in terms of space – inside and out – and design
 - how and where we should provide for the provision of health, youth, community and cultural infrastructure, and other local community facilities
 - how and where we should provide for development to support a sustainable economy
 - how we should provide for critical public infrastructure
 - a better, more comprehensive plan for St Helier, that includes a new strategy for movement and the sustainable use of its network of roads and streets; and enhancing the provision of and access to public open space
 - how to enable the careful development of taller buildings in appropriate locations
 - how to plan for the marine environment, and
 - how best to plan for minerals, waste, energy and water; and the sustainable use of natural resources

³ See: [Ministerial decision](#) MD-PE-2020-0072: Island Plan Review: In-Committee Debate Summary

- 4.5. There are number of key issues that require particular attention.
- 4.6. The planning system has a key role in addressing the availability and cost of housing in Jersey. The bridging Island Plan will need to establish a policy framework that ensures that the right open market homes are built and makes the right provision for the sustainable development of affordable housing; key worker accommodation; and meets other specific housing needs. In doing so, the Plan will be informed by, and respond to, the work of the Housing Policy Development Board.
- 4.7. This Island Plan will need to recognise that the States Assembly has declared a climate emergency and has also agreed to pursue the development of an entirely sustainable transport system by 2030. While detailed work on both the Carbon Neutral Strategy and Sustainable Transport Policy continues, the Plan will facilitate new programmes and policies to promote long-term environmental sustainability for Jersey.
- 4.8. The Plan will need to make provision for the redevelopment of critical public and community infrastructure. This will include provision for a new hospital, responding to requirements for education, meeting the needs of young people and adequately providing for those in care and care leavers, enabling the regeneration of Fort Regent and the provision of the island sports estate.
- 4.9. The Plan will need to address the significant challenges within the Town of St Helier. An updated spatial plan will lay the groundwork for the long-term sustainable development of town, including its streets and public spaces, and respond to changing demands of living, socialising, travelling and working that have been highlighted by our experience of the Coronavirus pandemic.
- 4.10. The Plan will adopt the new Integrated Landscape and Seascape Character Assessment to establish a new long-term policy regime that provides for the robust protection of the island's most sensitive coast and countryside, and the right sympathetic development of greenfield land where it is most appropriate to do so. This will include revision of the spatial extent of the Coastal National Park, and a review of the associated policy regime to provide the highest protection for the island's most sensitive landscape and seascape areas. It will also involve a cautious update of the current green zone policy; and the development of new marine zone policies, embracing the island's coastal waters out to territorial limits.
- 4.11. To operate as a bridging Island Plan, it must also create the best foundations for the next long-term Plan from 2025. To do this, bridging Island Plan will set out a number of policy development proposals that will be prioritised over the plan period. These policy development proposals – resourced through the Government Plan process and written into departmental operational business plans – are likely to include:
 - an appropriate planning response that considers the sustainability of the future economy, having regard to the need to identify and facilitate the development of sustainable and appropriate economic opportunities throughout the island, including urban centres outside of town and the ports;

- a comprehensive marine spatial plan - which covers all activities undertaken in the marine environment - to protect and enhance the optimal value of the island's territorial waters to meet environmental and economic objectives in a sustainable way over the longer-term;
- more detailed planning for the sustainable development of the island's urban centres outside of St Helier, including parish centres, to ensure the development of sustainable communities and the provision of community facilities; and
- the development of new regimes for the better management and protection of the island's historic environments; and for the protection and enhancement of biodiversity, including the regulation system for the protection of trees and enhancement of green infrastructure, including new legislative provision where necessary.

4.12. The bridging Island Plan will also draw on the first phases of the infrastructure capacity study in order to make provision for developments that will be necessary in the medium-term. When all phases are complete, the infrastructure capacity study will provide a forecast of infrastructure requirements over a 15-year period.

Proposed strategic policies

4.13. Seven strategic policies are proposed. They will carry significant weight within the plan and apply broadly to all planning applications.



- 4.14. Together, these seven strategic policies provide the overarching framework to promote sustainable development and deliver the vision of Jersey as a special place, that faces the future; values and protects its environment and unique island character and identity; and acts with confidence to create the homes and jobs that sustain family and community life.
- 4.15. The proposed policy principles for each of the seven strategic policies are set out in the accompanying table.

Proposed strategic policy	Principles
Spatial strategy	<ol style="list-style-type: none"> 1. make the most efficient and effective use of land already developed 2. concentrate development in and around existing urban centres and services 3. reduce the need and distance travelled, and enable more choice of sustainable, active travel options 4. avoid the development of the undeveloped coast and countryside 5. positive consideration of future land-reclamation proposals in St Helier.
Placemaking	<ol style="list-style-type: none"> 1. design and the quality of new development at all scales should create well-designed and well-built places that benefit people and communities 2. the creation of high-quality buildings and places is fundamental to the planning and development process 3. good design is a key aspect of sustainable development; it can create better places, and lead to the improvement of existing environment, in which to live and work; it directly influences people’s health and wellbeing; and can help bring communities together 4. good design to achieve spaces that are fit for purpose; durable and aesthetically pleasing.
Responding to climate change	<ol style="list-style-type: none"> 1. support the transition to a low carbon future in a changing climate 2. contribute to reductions in greenhouse gas emissions 3. minimise vulnerability and improve resilience to the effects of climate change 4. encourage the reuse of existing resources, including the sustainable conversion of existing buildings 5. support renewable and low carbon energy and associated infrastructure.

Proposed strategic policy	Principles
Protecting and promoting island identity	<ol style="list-style-type: none"> 1. encourage and enable development which promotes and supports the island's identity and character 2. protect and enhance island identity by, in particular recognising and protecting cultural heritage assets as an irreplaceable resource which help to define the island's identity, character and sense of place 3. recognise the wider benefits of art, culture and heritage for people's health and wellbeing; and the island's economy.
Protecting and enhancing biodiversity and the natural environment	<ol style="list-style-type: none"> 1. protect and enhance biodiversity and geodiversity 2. recognise and protect the intrinsic beauty and character of the island's coast, countryside and its marine environment 3. recognise the wider benefits of natural environmental capital and ecosystem services for people's health and wellbeing.
A productive, diverse and sustainable economy	<ol style="list-style-type: none"> 1. support the maintenance of a productive and diverse economy; and encourage the development of a local market for goods and services 2. help promote and enable small footprint/high value business; and foster innovation 3. help to enable the creation of attractive and rewarding sustainable employment opportunities 4. help to support and enable the development and enhancement of local skills and training in order to reduce the reliance on in-migration.
Planning for community needs	<ol style="list-style-type: none"> 1. help to ensure that all islanders have access to and can afford a decent home 2. help to ensure the maintenance and enhancement of community infrastructure to support physical and mental wellbeing and the quality of life of all people across the island, including within St Helier and other built-up areas 3. seek to enable a diverse, inclusive and more equitable society; and to ensure that development meets the needs of all islanders – children, young people, adults, families and older people, those in care and care leavers, both able-bodied and disabled 4. help to ensure that adequate provision is made for the necessary public and other infrastructure that is required to sustain the island's community and its development needs 5. ensure that islanders are not exposed to undue risk arising from development and the use of land.

5. Proposed planning assumption

Introduction

- 5.1. Ordinarily, a long-term planning assumption would be established at this stage to inform ten-year plans for housing, economic development and infrastructure along with other community needs, such as accommodating an ageing population and meeting education and health care requirements.
- 5.2. A reasoned and justifiable planning assumption ensures that appropriate provision of land and development opportunities is made in the plan, in order that a sustainable balance is struck overall.
- 5.3. The role of the planning assumption in informing the bridging Island Plan though is somewhat different. The shorter timescale plan is proposed because it is very difficult, in the midst of the on-going Coronavirus pandemic, to model the potential future population and demand figures. This is particularly the case where in-migration is very closely driven by economic performance.
- 5.4. The near-term planning assumption is used to inform the analysis of housing demand set out in section six, which will inform both policies and site allocations in the draft Island Plan. A longer-term planning assumption is also established to inform future infrastructure capacity requirements.
- 5.5. This short-term Island Plan, and the subsequent Island Plan Review will need to re-establish, and plan for, longer-term requirements for housing and infrastructure based on a longer-term assessment and established policy basis for migration and population. The bridging Island Plan provides an opportunity to recognise future challenges; and signal potential response to them having regard to issues of supply and delivery.

The importance of population

- 5.6. Recognising the challenges associated with making forward assumptions at the present time does not mean that understanding current and potential future population levels is not of central importance to the Island Plan Review. The importance of population was raised frequently in the Strategic Issues and Options consultation in 2019 and is a theme of public comment whenever the Island Plan is discussed.
- 5.7. While the shorter scale bridging Island Plan is intended to mitigate the risks of making long-term plans in a volatile context, it will still be based on the best available data, and the planning assumption will still directly inform policy development and site selection.
- 5.8. One significant difference though, is that the bridging Island Plan can be de-coupled from the *sequential* development of a population policy by the current Council of Ministers.

- 5.9. The Chief Minister, on 20 October 2020, lodged a proposed new migration control policy⁴, informed by the work of the Migration Policy Development Board. If the States Assembly adopts this proposition, it will request the Chief Minister to bring forward amendments to the States of Jersey Law 2005 to require the Council of Ministers to develop a common policy on population. The report accompanying P.137/2020 sets out that:

If this proposition is adopted in December, we will then be in a position to produce an interim population policy in advance of the statutorily required policy that will be required under the proposed law changes. Following the election in 2022, the new Council of Ministers will be required to make full use of the new legal and political structures available to them and will be obliged to publish their full population proposals during 2022.

- 5.10. The development of the Island Plan can progress in tandem with the States Assembly's consideration of P.137/2020 and the anticipated future publication of a population policy because the impact of that new policy on the overall population of the island will take several years to take effect. In the meantime, the primary impacts on migration are likely to stem from the post-COVID and post-Brexit economic and immigration contexts, rather than the adoption and implementation of local policy which seeks to further regulate migration.
- 5.11. The proposed new migration control policy and future population policy, together with the planned Census; greater learning about both the performance of the island's economy following the pandemic and the impact of post-Brexit immigration changes; and the development of a longer-term economic framework for the island; will all inform long-term planning in the coming years and can be fully reflected in the subsequent Island Plan from 2025.

Analysis

- 5.12. The Island Plan Review Team has worked with Statistics Jersey, the Economics Unit and colleagues in Strategic Policy, Planning and Performance and other government departments in order to ensure that the planning assumption is informed by available evidence and trends – particularly about population dynamics and changes to the demographic profile of our community – and, where appropriate, the anticipated impact of future government policies.
- 5.13. However, the work also reflects a series of informed assumptions about population changes that might unfold in the coming years, given the high degree of uncertainty about changes to population brought about by the Coronavirus pandemic in 2020 and beyond.
- 5.14. To establish a baseline, it is necessary to consider previous annual rates of population growth which, in recent years, has very substantially exceeded the +325 planning assumption used in the 2011 Island Plan, which was derived from adopted States of Jersey policy at the time.

⁴ P.137/2020 see: <https://statesassembly.gov.je/assemblypropositions/2020/p.137-2020.pdf>

5.15. The resident population of Jersey at year-end 2019 was estimated as 107,800⁵. During 2019 the resident population was estimated to have increased by 1,100 persons, with net inward migration accounting for 1,000 and natural change (births minus deaths) accounting for 90 of the estimated annual increase.

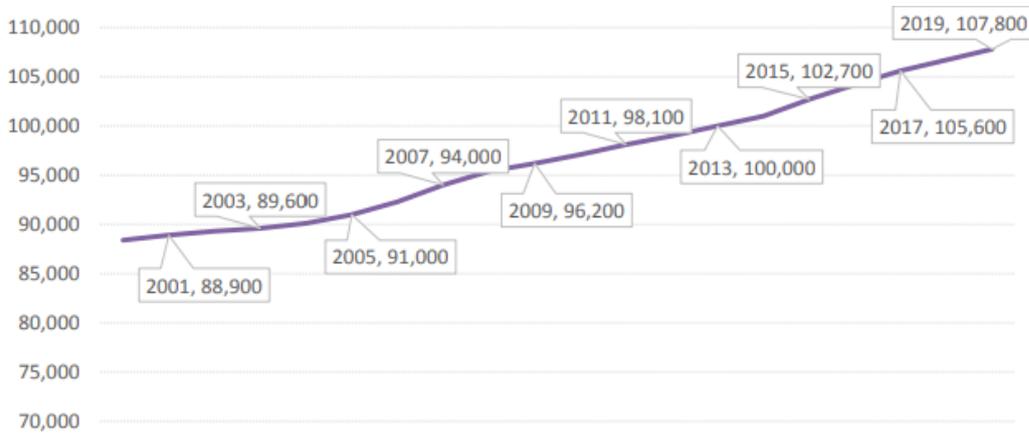


Figure 1: Estimated resident population of Jersey

5.16. The following chart estimates the future Jersey resident population based upon different assumptions in future levels of migration⁶.

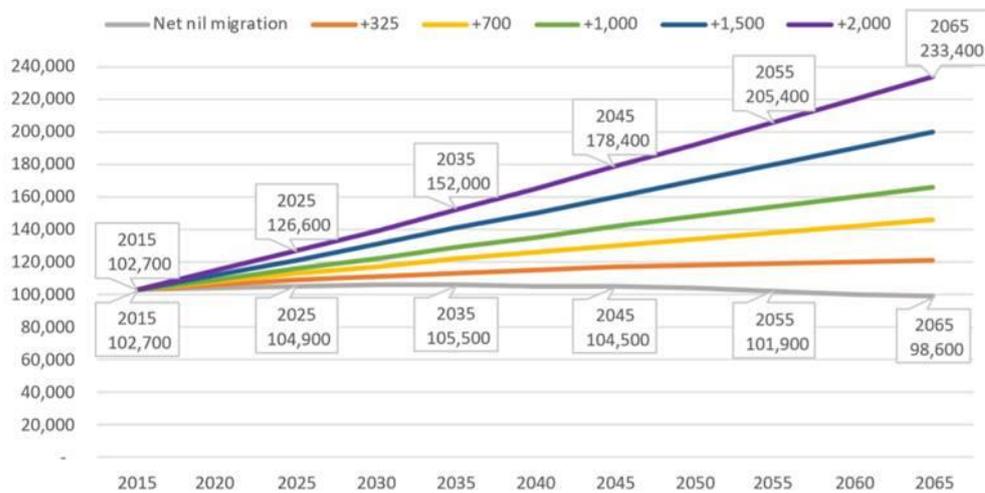


Figure 2: Projection of resident population 2015 – 2065 under various migration scenarios^[3]

5.17. In the five-year period leading to the development of the bridging Island Plan, the average population change has been an additional 1,370 people a year. However, a consistent

⁵ Total resident population at year-end, 2000 to 2019 (Statistics Jersey), See: <https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Population%20Estimate%20Current%2020180620%20SU.pdf>

⁶ Jersey Population Projection Report 2016 (Statistics Jersey) See: <https://www.gov.je/government/pages/statesreports.aspx?reportid=2370>

downward trend underlies this average, with the total annual increase falling by around 100-200 people each previous year, from a high point of 1,700 in 2015. This trend is driven by reductions in both natural growth and net inward migration⁷.

Calendar year	Natural growth	Net inward migration	Total annual change
2015	220	1,500	1,720
2016	200	1,300	1,500
2017	130	1,200	1,330
2018	100	1,100	1,200
2019	90	1,000	1,090
		5 year average	1,370

Figure 3: Change in Jersey's resident population, 2015 – 2019

- 5.18. As in previous years, the level of net inward migration will largely determine the total annual change in population that the new Island Plan will make provision for. This is likely to continue over both the bridging Island Plan period (till 2025) and onwards over the subsequent plan period (2025 - 2035), with a contributing factor to this being an underlying ageing profile of the Jersey population.
- 5.19. In turn, the level of net migration is largely interdependent with the level of employment growth over the period of the plan.
- 5.20. Employment growth in recent years has typically averaged between 1-2% per annum. This level of growth has driven a higher level of net migration than observed in previous decades, primarily as a result of two factors:
- slowdown of growth in economic participation levels – the island experienced significant increases in levels of economic participation in the 1960s, 70s and 80s, largely as a result of more women entering the workforce, however, these numbers have remained largely static in recent years
 - ageing demographic – as a result of the ageing population, the level of natural growth in the working age population is now negative (more people are retiring than entering the workforce).
- 5.21. Had the Coronavirus pandemic not occurred, and had the economy continued to grow in the coming years at comparable rates, the levels of net migration required to respond to this growth would be expected to be higher than the level of net migration required to facilitate the same level of growth over the previous period. This is because unemployment has been

⁷ Change in Jersey's resident population, 2015 – 2019 (Statistics Jersey), See: <https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Population%20Estimate%20Current%2020180620%20SU.pdf>

consistently low over the recent period and because of the continued natural shrinkage of the local working age population (as a result of the further ageing of the population) that will occur in the coming years.

5.22. Following the Coronavirus pandemic, the economic outlook now looks very different and hence its impact as a driver of net migration will be different. Quite how these differences will manifest – both in our economy and in net migration figures – is difficult to model given the current high levels of volatility⁸. The switch to a shorter-term bridging Island Plan is a means of ensuring that progress in key policy areas can be made whilst ensuring sufficient strategic agility to respond to the events and trends observed once the pandemic situation have eased.

5.23. The graph below shows the economic growth projections established in the Fiscal Policy Panel’s initial analysis of the impacts of the Coronavirus pandemic, which was undertaken in March 2020. These projections assume the rapid and effective control of COVID-19 on an on-going basis.

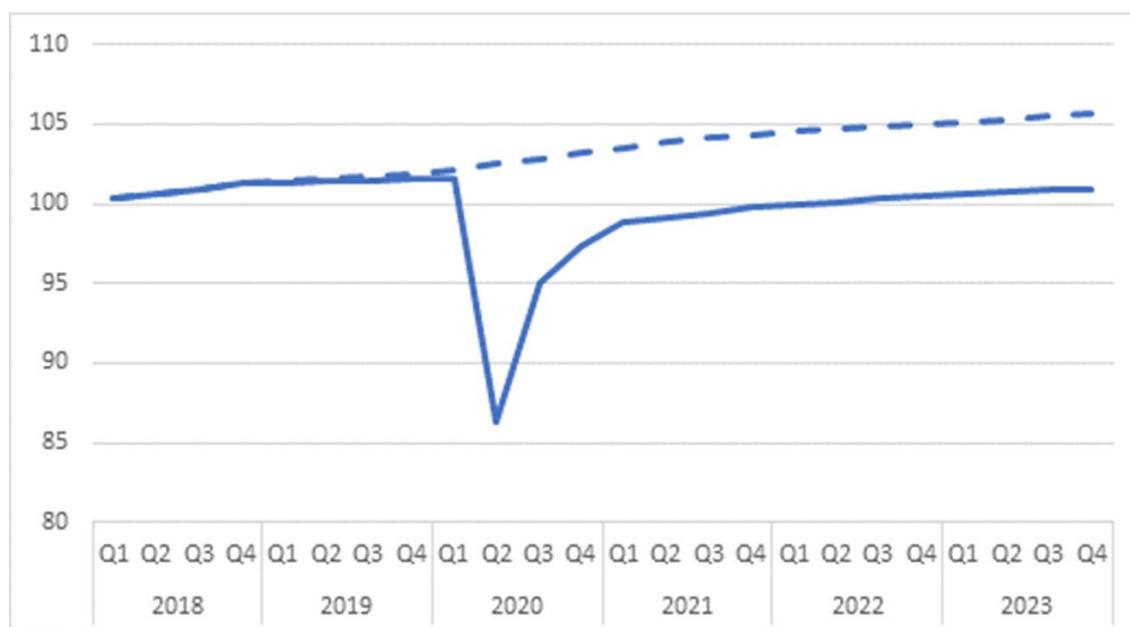


Figure 4: Fiscal Policy Panel – economic growth projections, March 2020

⁸ For example, at the time of writing, the on-going threat from Coronavirus to jurisdictions such as Jersey is judged by the European Centres of Disease Control to be moderate to high, with associated potential risks to economic activity from potentially necessary public health interventions and restrictions.

5.24. The Fiscal Policy Panel subsequently set out further analysis about potential implications for Jersey's economy on 05 August⁹. Key points include:

- employment to fall by around 1.6 per cent this year, on an annual average basis.
- largely flat average earnings in nominal terms this year.
- restraint in financial services sector bonuses will act as a drag on the economy next year.
- profits in the banking sector are likely to see significant reductions this year.
- profits in the non-finance sectors are also forecast to see considerable falls this year.
- profitability in the non-finance sector is expected to recover slowly as demand remains weak.
- considerably fewer (housing market) transactions than in 2019, with prices to remain broadly flat over the next two years.

5.25. Overall, compared with March, the Panel's forecast (made in August 2020) is for a slightly steeper fall in real GVA this year and a slower recovery: this will need to be kept under review relative to the continued prevalence and impact of the pandemic.

5.26. Internal analysis¹⁰ also suggest an important difference between 2008 and the current recession: in comparison to the 2008 crash, which was characterised by steep falls in finance sector GVA, the current recession is expected to be characterised by steep falls in the non-finance sectors such as hospitality. Changes in registered employment – as a primary driver of in-migration – are well explained by changes in GVA, but crucially non-finance GVA has an impact on registered employment that is three times greater than the impact of finance GVA.

5.27. It is considered highly likely that this increase in unemployment, and the predicted sustained dampening of economic growth, will have a depressant effect on employment and lead to a further substantial slowing of the growth in annual net migration.

5.28. The situation for 2022-2024 is further complicated by uncertainties related to the end of the Brexit transition period on 1 January 2021. It is unclear currently what post-Brexit arrangements might come into play, but the absence of a deal remains a reasonable possibility.

5.29. The Government's Economics Unit published its economic assumptions for a no-deal Brexit in September 2019. The key points include:

- a no-deal scenario should not significantly affect the competitiveness of Jersey's financial services sector in the short term.

⁹ See:

<https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/ID%20Fiscal%20Policy%20Panel%20Economic%20assumptions%20August%202020%2020200805%20CB.pdf>

¹⁰ Government of Jersey Economics Unit – internal comparative analysis September 2020.

- trade in goods with the EU may be affected, though this is relatively small as a proportion of the economy.
- however, the domestically focused economy would see a fall in demand as prices for imports rise.
- the cost of local production would also rise, and this is likely to further reduce demand
- in 2020 and 2021, the fall in demand is expected to hit both employment and profits in the non-finance sectors.
- the resultant reduction in demand for labour would see earnings contract in real terms.
- the overall economy would contract sharply in 2020 with a further smaller contraction in 2021. GVA growth could be expected to see a small bounce back in 2022, due to a recovery in employment.
- the combined impact of the no-deal scenario sees real GVA 6% lower than the base case by the end of the forecast period (2022).

5.30. While this analysis reflects the situation as understood in late 2019, current understanding is that a no-deal situation at the end of the present transition period is likely to result in many of same impacts that are identified above. A significant risk therefore remains that Brexit transition may result in a substantial weakening of the Jersey economy.

5.31. In addition to potential economic impacts, Jersey will be subject to new immigration controls from the end of the transition period as a result of its membership of the Common Travel Area. The final report of the Migration Policy Board recognises the potential implications of this change:

From 1 January 2021, the UK intends to introduce a points-based immigration system and to remove the right of EU nationals to live and work freely in the UK. It is likely this will require EU nationals to have immigration permissions to live and work in the UK. We expect that these changes will be mirrored in Jersey.

The impact of these potential changes upon the flow of EU migrants to Jersey is not yet clear. Some stakeholders, notably in the hospitality and agricultural industries, have raised concerns that these changes might impact their traditional supply of workers.

5.32. Work is being undertaken to develop Jersey's Future Border and Immigration System (FBIS) which will determine how EU nationals will be able to visit, work, study and settle in Jersey, from 1 January 2021¹¹.

¹¹ See statement from the Home Affairs Minister, Connétable Len Norman:
<https://www.gov.je/news/2020/pages/futureborders.aspx>

5.33. Whilst there remains a high degree of uncertainty regarding the potential economic and immigration impacts of Brexit, it is reasonable to conclude that there is a high likelihood that a challenging Brexit transition would also have depressant effect on employment and lead to a further slowing of the growth in annual net migration, *in addition to* the impact of Coronavirus outlined above.

5.34. The nature and scale of this depressant effect is difficult to judge. In establishing a comparator, it is reasonable to draw on evidence from the impact of the global financial crash of 2007-08. The table below shows that net inward migration fell sharply in the five years after the crash (2009-2013), with average inward migration over this period running at +600 people each year. In the five years prior to the crash (2004-2008) average inward migration was +920 people per year. This represents a 35% fall in the average annual inward migration rate.

Calendar year	Natural growth	Net inward migration	Total annual change
2001	190	300	500
2002	90	300	400
2003	250	0	300
2004	220	300	500
2005	220	700	900
2006	190	1,100	1,300
2007	320	1,400	1,700
2008	300	1,100	1,400
2009	250	500	800
2010	270	700	900
2011	390	600	1,000
2012	360	500	800
2013 ⁵	300	700	1,000

Figure 5: Change in Jersey’s resident population, 2001 – 2015

5.35. If a 35% reduction is applied to the most recent five-year trend (1,370 people per year, see figure 3 above), the average over the coming five years (representing two years of plan development 2020-21 and the three years of the plan period 2022-24) would be expected to fall to around 900 people per year.

5.36. To account for the general downward trajectory of growth in inward migration in recent years, a 35% reduction might equally be applied to the more recent three-year trend of 1100 per year (see figure 3 above). In this case, the average over the coming five years would be expected to fall to around 700 people per year.

5.37. In light of the difficulty in establishing the scale and nature of the economic drivers of migration in the coming five years, it might be considered reasonable to assume that

average annual net migration for the next five years will fall in the middle of this range (at +800 per year). However, given:

- the 'gearing' effect of the anticipated falls in non-finance GVA (at three times the greater impact on registered employment than equivalent falls in finance sector GVA in 2008); and
- the *cumulative* likely effects of:
 - the economic impacts of coronavirus
 - the numbers of registered employed that, during the pandemic, returned to a permanent place of residence outside Jersey
 - the economic impacts of Brexit
 - and the immigration impacts of Brexit;

it is considered most appropriate to conclude that average annual net migration for the next five years will fall at the lower end of this range, at +700 per year and a total of +3,500 over the five years 2020-24.

5.38. Within this average, it would be expected that net migration:

- is likely to be lower than +700 in 2020, in particular driven by the departure of previously resident islanders during the pandemic
- may remain below +700 in 2021, and potentially 2022, given the projected economic challenges. This will be more likely if a significant second phase of Coronavirus asserts itself in Jersey or elsewhere over the coming winter, and
- will gently rise during the plan period of 2022-24 as the economy recovers.

5.39. Overall population growth also includes natural growth. It is considered reasonable to assume a continuation of the recent three-year trend of around +100 per year (see figure 3).

5.40. Taken together, the suggested natural growth and average net migration figures suggest a near-term planning assumption of around 4,000 over the five years from 2020-24, based on an average annual increase of +800 per year.

Longer term considerations

5.41. To operate as a bridging Island Plan, rather than simply a stand-alone short-term Island Plan, the forthcoming document also needs to give the right consideration to the medium- and longer-terms and must seek to create the context for the best start to the next long-term plan from 2025.

5.42. To do this, the evidence base for the bridging Island Plan explores issues over the most appropriate timescale. For example, housing supply is considered over a five-year period; infrastructure capacity over a 15-year period; and sea-level rise over a 100-year period. A population planning assumption is also therefore required to inform longer-term infrastructure capacity planning.

- 5.43. Infrastructure projects are generally of higher complexity, cost, and contention than other developments, and hence the planning process for them will generally start a number of years before the infrastructure is expected to be required. It is important that the bridging Island Plan has a view on infrastructure requirements over a longer-term horizon (15 years) but places a focus on those schemes that are most likely to need to come forward for a planning decision during the plan period.
- 5.44. For infrastructure planning, sensitivity to population increase is typically lower than it is for housing supply. This is particularly true when there is existing capacity in the system to withstand future growth. In cases where there is low capacity in the system, the sensitivity to population increase sharply rises and can carry greater risks; this would be most severe for critical services and utilities.
- 5.45. While the population impacts of Coronavirus and Brexit will be less acute over the longer-term horizon, there are other significant events and trends that will emerge during that period. Many of these will be shaped by planned Government policy, including for example:
- the introduction of more responsive migration controls
 - a future economy programme to support productivity
 - investment in skills development, and
 - a workforce strategy for public value employees
- 5.46. The Island Plan covering the 2025 – 2035 period will need to develop a further planning assumption, based on available evidence at that time. It will benefit from making long-term plans with input from the 2021 Census and a more stable economic outlook over the period.
- 5.47. An informed assumption for population growth over the short-term, together with view over the longer-term, will be key to ensuring that longer-term needs can be met without causing further housing undersupply, or unexpected and costly infrastructure requirements. This will need to be met with sufficient, government-led, interventions that can enable delivery and meet the required level of investment in the infrastructure that is required to support the wellbeing of Islanders.
- 5.48. The longer-term planning assumption does not directly impact land allocation or site selection in the bridging Island Plan. Instead it is used to assess longer-term challenges and ensure that appropriate provision in the subsequent long-term Island Plan from 2025.
- 5.49. A broadly drawn planning assumption of average annual population growth of +1,000 has been used to inform relevant infrastructure studies.

Revising the planning assumption

- 5.50. The near-term planning assumption is used to inform analysis of housing demand, spatial strategy and, subsequently, site selection for the draft Island Plan.
- 5.51. During this further period of plan development (September 2020 – January 2021) a number of events and trends will occur that will help to narrow the range of uncertainty that is accounted for in the above planning assumption analysis. These include:
- the Government’s fiscal stimulus programme will give each Islander £100. This is expected to act as an incentive to people to ensure their administrative details are correctly held by Government, which may provide updated information about current residency numbers;
 - the Brexit transition period will end on 31 December 2020 and the details of any associated deal will become known; and
 - the trajectory of the Coronavirus pandemic will become known as the northern hemisphere moves into winter.
- 5.52. Following ministers’ consideration of this preferred strategy report, the Island Plan Review will develop specific policies and proposals on the basis of the planning assumption set out here. Revising these in light of a changed planning assumption would require additional time not currently factored into the delivery programme (see appendix 1).
- 5.53. Nevertheless, if the events and trends outlined above, or any others, take significant effect over the coming months, it may be prudent to revise the planning assumption and, accordingly, amend the draft bridging Island Plan, before progressing to public consultation.

Conclusion

- 5.54. Having regard to the analysis above, the bridging Island Plan will assume a near-term population increase of around 4,000 over the five years from 2020-24 based on an average annual increase of +800 per year.
- 5.55. For the purpose of long-term infrastructure planning a broadly drawn planning assumption of average annual population growth of +1,000 has been used to inform relevant studies.

6. Housing demand and delivery

- 6.1. Housing, and in particular the location and affordability of new housing development, is the most sensitive subject to be considered by the new Island Plan.
- 6.2. The planning system has a key role to play in addressing the availability and cost of housing in Jersey. The bridging Island Plan will need to establish a policy framework that ensures that the right open market homes are built and makes the right provision for the sustainable development of affordable housing. The plan will be informed by, and respond to, the work of the Housing Policy Development Board and the Island Public Estates Strategy.
- 6.3. This section reviews the anticipated demand for housing, based on the proposed planning assumption set out in section five, and summarises available capacity to meet this demand in a range of environments. It also reflects on policy and deliverability considerations.

Housing requirement

- 6.4. The Objective Assessment of Housing Need¹² (OAHN) makes clear that more housing is required in the coming years, regardless of migration, as people live longer and household size continues to reduce. The report analyses the number of additional units that would be required under four population growth scenarios (net nil; +325; +700; and +1000): summary data from the OAHN is included in appendix 3.
- 6.5. The OAHN also assesses the type of housing required against all tenures (non-qualified; owner occupier; qualified rent; social rent). It concludes that there is significant demand for larger 3- and 4-bedroom homes for purchase across all scenarios (as an example, 45% of homes in a +700 population growth scenario).
- 6.6. This demand for more family homes brings significant land use challenges, but it is important to note that the housing requirement does not directly translate to a requirement for *new housing stock*. As the OAHN notes, “...*better use of existing stock has the potential to help address some of the need being evidenced.*” Significant effort will be required to ensure that the need for new development can be mitigated wherever possible through the development of active housing policy coordinated across all areas of government.
- 6.7. Even with ambitious policies interventions, it is likely that the great majority of future housing demand will need to be met through additional development within the Island Plan.
- 6.8. In addition to the housing requirement set out in the OAHN report, it is recognised that population growth over the current Island Plan period has been significantly higher than the anticipated additional 325 people a year, averaging around 1,000 people a year. Statistics Jersey has estimated that, as a consequence of this, a net shortfall of 1,800 homes has arisen over the current ten-year plan period (2011-2020), of which approximately half will be in the

¹² Published January 2019, see:

<https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/Objective%20Assessment%20of%20Housing%20Need%20Report.pdf>

unqualified sector¹³. Some of the demand associated with this shortfall may have been met by existing under-capacity in the market, but it is reasonable to assume that the remaining unsatisfied demand is contributing to the housing pressures experienced in Jersey, and creating additional demand that should be reflected in the housing requirement.

Five-year housing development target

- 6.9. A specific scenario for the proposed planning assumption of +800 per year is not set out in the OAHN. However, internal modelling by Statistics Jersey, which uses the same methodology as the OAHN, suggests that average annual population growth of +800 per year would create a housing requirement of 6,100 homes over a ten-year plan period 2021-30.
- 6.10. Recognising the net shortfall of 1,800 homes that arose during the last plan period raises this ten-year requirement to 7,900. It is proposed, however, that the target should be profiled evenly over the coming ten years, with 50% of the target – or 3,950 units – falling to be met in the first five years.
- 6.11. The Housing Policy Development Board is currently concluding its report to the Chief Minister. This report will allow for a detailed assessment of the potential to mitigate development through the application of wider housing policy. At this stage, it is considered appropriate to conclude that, as a minimum, Government might seek to address 5% of the identified housing requirement (rounded to 200 units) through non-development policies over the bridging Island Plan. This is considered a reasonable target given the time necessary both to develop and begin to implement the necessary policy actions plans.
- 6.12. The housing development target over a five-year planning period (2020 and 2021 under the present Island Plan; and 2022-24 under the bridging Island Plan) arising from changes in ageing and dwelling patterns; from increases in population over the plan period; and from the net shortfall of the last plan period, is proposed to be set at 3,750 units, of a type and tenure consistent with the OAHN analysis set out at appendix 3. It is important that the both the Island Plan and wider package of government-led interventions are responsive to meet this shorter-term housing need, in order to mitigate a further exacerbation, or bottle-necking, of latent demand that will need to be recovered over the subsequent plan period (2025-2035).

¹³ Statistics Jersey analysis (2019).

Housing supply summary

- 6.13. Work has been undertaken, at a strategic level, to look at how the new Island Plan might seek to respond to meet this housing requirement to provide a supply of land and development opportunities. The estimate of supply is imprecise and dependent upon a number of assumptions; as such it is kept under continual review.
- 6.14. The summary table below sets out the best available information about how the housing requirement might be provided as a result of new Island Plan policy, which is integral to the development of a new spatial strategy for the Island Plan - about where new development should take place - which is further considered in section 7. In summary, these sources are:
- Sites under construction
 - Sites with outstanding current planning permission
 - Capacity of the town (incl. SW St Helier Planning Framework)
 - Development of Government of Jersey-owned sites
 - Capacity of other urban areas
 - Capacity of rural areas
 - Future extensions to main urban areas (rezoning)
 - Future extension to rural villages (rezoning)

Supply source		5-year supply 2020-24		Level of Certainty
		Low estimate	High estimate	
Under construction end 2020		500	750	High
Planning Permission end 2020		800	1,200	Medium
Town Capacity	Private sites	400	1,000	Medium
	Government sites	300	600	High
Windfall		500	800	Medium
Rezoning		300	700	Low
Total Estimated supply		2,800	5,050	

Figure 6 – summary of housing supply capacity

- 6.15. From the estimated levels of demand and net supply level table, it is estimated that under the proposed planning assumption and an associated housing target (at 3,750 homes), there will be between an under-supply of 950 units to an over-supply 1,300 units.

Deliverability and wider housing policy

- 6.16. A wide range of uncertainty exists in respect of future net levels of supply. These risks can be mitigated, in part, by considering deliverability and housing policy options. Delivering the additional housing needed is very likely to require a different policy response in the bridging Island Plan and subsequent plans to that of the current Island Plan.
- 6.17. The supply of housing over the coming five-year period may also be influenced by the current pandemic, although the specific impacts – be that on available policy options or development industry capacity – are currently unclear. This will need to be kept under review and may require additional intervention or enabling measures by Government to ensure the plan is deliverable.
- 6.18. The housing policy context for the bridging Island Plan is primarily set by the work and recommendations of the Housing Policy Development Board (HPDB)¹⁴ The Board has identified three major policy intervention packages, which can be summarised as:
- Government-led interventions to increase the supply and availability of housing;
 - planning measures to facilitate new supply and affordability; and
 - policies to improve affordability, access and quality across the rented sector
- 6.19. Key to addressing the demand for larger family homes will be policies to develop modern, welcoming ‘last-time buyer’ homes in recognisable, mixed communities – together with a framework of market incentives and products – in order to encourage islanders that might be under-occupying to release existing family homes back to the market.
- 6.20. In addition, to meet the identified demand across all housing types, the bridging Island Plan will need to enable and catalyse additional development industry activity over and above the recent average build rate, which stands at just over 400 units per year since 2011. In this respect, the availability of public land and funding for housing; political support for publicly delivered housing; and operational capability and clarity, will all be significant determinants of the success of the housing delivery objectives of the bridging Island Plan.
- 6.21. The draft Island Public Estates Strategy anticipates this challenge and has identified sites that are included in the supply estimates set out above. Similarly, emergent changes to governmental structures and organisation are designed to better facilitate the release and/or development of sites. However, given the level of housing required, Government may need to play an active strategic role to facilitate housing delivery – to assemble land, master plan and deliver homes or assemble and dispose of development sites – to achieve the objectives of the plan. Further work will be undertaken to consider the viability and implications of meeting the demand for homes and infrastructure over the short-term plan

¹⁴ The HPDB was established to examine the housing market in Jersey and to develop comprehensive proposals that improve the supply, affordability, access to, and standard of housing on the Island. For more information see: <https://www.gov.je/government/policydevelopmentboards/pages/housingpolicydevelopment.aspx>

period having regard to issues such as local capacity in the construction industry and inflationary pressures.

- 6.22. There are land-use planning policy options that could support the delivery of new homes and help ensure they are of the size, type and tenure required over the plan period. The major policy interventions being considered for the bridging Island Plan, to enable a sufficient supply in line with the identified housing requirement, therefore include:
- a continued presumption in favour of development in the built-up areas at sustainable density levels, which will include considerations of the height of buildings
 - the requirement to provide a proportion of affordable housing in all schemes over a certain size
 - the identification and use of Government owned surplus assets to deliver both affordable and mixed tenure housing schemes
 - some selective rezoning of green field land to deliver affordable and sheltered/last time buyer housing, where this contributes to the overall community wellbeing and sustainability of an existing settlement.
- 6.23. Subject to further detailed site analysis linked to these options, consideration may also be given to enabling the creation of new dwellings or households through the redevelopment of existing buildings in the countryside, where key criteria can be met.
- 6.24. There also exists an opportunity to harness some of the land value increase associated with the grant of planning consent and re-invest this back into the community, be that for housing or other community infrastructure. There are range of mechanisms that can achieve this, which can be applied to a range of benefits. This includes requiring a proportion of all new housing development to be affordable (akin to the former Policy H3), introducing a low-level development land tax such as an infrastructure levy, or enhancing the use of existing planning obligation agreements to offset and manage the impact of development.
- 6.25. Care will need to be taken to ensure that any land value capture mechanisms taken forward in the bridging Island Plan are able to support the supply of homes and living standards, whilst ensuring that development remains viable.

Longer-term considerations

- 6.26. Proposals for housing development involving the release of greenfield land are expected to be contentious. This is evidenced by the considerable resistance from local residents and their political representatives to new housing developments on land zoned in previous Jersey Island Plans and is anticipated in the findings of the Strategic Issues and Options consultation. It is also evident, however, that there is increasing public concern about the densification of development in urban areas, particularly where this is provided without the commensurate level of community infrastructure to ensure the development of sustainable communities.
- 6.27. In light of these on-going challenges, the bridging Island Plan should also consider proposals that provide for early exploration of and progress with additional housing policy

options that may need to feature in the next Island Plan from 2025. Such options may include further expansion to the Town of St Helier; further expansion to or significant redevelopment of other key settlements; and the potential for further land reclamation for St Helier and/or the re-purposing of La Collette, together with the provision of community infrastructure, including open space, necessary to support increases in housing in the urban area.

7. Spatial strategy

- 7.1. Where development is located in the island is set out in the spatial strategy of the Island Plan.
- 7.2. The spatial strategy is a key part of the strategic policy framework. It has a major influence on the extent to which the Island Plan contributes towards sustainable transport and reducing carbon emissions, and promoting sustainable communities in which people can readily access school, work, shops and other services.
- 7.3. The spatial strategy of the current and previous Island Plans has generally been based on the principle of integrating development within the island's existing built-up areas, based on a hierarchical categorisation.
- 7.4. As a consequence of this, the Town of St Helier has absorbed much of the island's economic and population growth – spilling beyond the boundaries of the parish of St Helier to embrace parts of the parishes of St Saviour and St Clement, and also involving the reclamation of land to expand the town and meet other strategic requirements.
- 7.5. This has encouraged the re-use and redevelopment of land that has already been developed, often resulting in more dense forms of development to deliver a more efficient use of the land.
- 7.6. This has been coupled with the limited release of greenfield land on the edge of existing built-up areas to provide new affordable housing, usually in the form of family houses. This form of development has occurred principally in the parishes of St Clement, St Saviour and St Brelade, together with the more limited release of land around some of the island's rural parish centres.
- 7.7. This approach has been successful in directing most development to the existing built-up area with the Town of St Helier and the rest of the island's built-up area absorbing most of new homes that have been delivered during the current plan period whilst seeking to ensure that the island's coast and countryside is generally protected from development. It has also meant that 85% of the island remains as relatively open countryside.

Consideration of spatial options

- 7.8. The Island Plan Review affords an opportunity to reassess the spatial strategy relative to the current challenges that the island faces. As part of the consultation about the strategic issues faced by the island the public were asked for their views about a range of broad abstract spatial options for the location of development in the new plan, accepting that a combination of these options would likely be necessary to be adopted to meet Jersey's future development needs.
- 7.9. Of the seven different spatial strategy options presented in the consultation, respondents showed the most support for focusing development within St Helier, with 71% of respondents supporting this option. Many expressed support for increasing the town's density to accommodate housing need. The option of expanding the town to the south, involving the development of the waterfront and the potential release of land within the

Port of St Helier was also generally supported. The notion of further land reclamation as a longer-term option also received some support. Related to this support for focusing development within St Helier, 78% of respondents expressed resistance to development in the countryside, highlighting the importance of preserving landscape character, biodiversity and agricultural land. Other options which were not popular included expanding the town to the north, expanding other out-of-town built up areas and the option of creating a new settlement or significantly expanding an existing settlement.

- 7.10. Because the bridging Island Plan will be developed for a much shorter term than a normal Island Plan, the extent of provision for development that needs to be made will be less than that normally required. There is also uncertainty about the extent of growth – and the subsequent demand for development – that the island will need to provide for over the longer term.
- 7.11. In this respect, and with regard to the generally conservative public response to the consideration of spatial alternatives, it is considered prudent for this Island Plan Review to be similarly conservative in its consideration of spatial options for the distribution of development across the island.
- 7.12. The bridging Island Plan will however still need to respond to and make revision for the range of development requirements over the short-term plan period and, having regard to the matter of deliverability, consider a five-year housing land supply. This will need to address; in particular, the need to provide for the immediate needs of affordable housing; key worker accommodation; and to provide some new local affordable housing provision to sustain balanced and vibrant parish communities in some of the island's rural parish centres.
- 7.13. There is also a need to ensure that the plan can make provision, where required, for longer-term strategic considerations and provide a decision-making framework for those that need to come forward for a planning decision during the bridging Island Plan period.
- 7.14. The extent of housing need, relative to the adoption of a planning assumption, has been considered in the preceding section, as have the issues of capacity of potential sources of supply; along with potential longer-term infrastructure requirements that might arise within the plan period of the bridging Island Plan.
- 7.15. In light of a consideration of all of these inter-related factors, the following strategic direction for the adoption of a spatial strategy is proposed:
 - focus development in the Town of St Helier (ToSH)
 - facilitate the development of key urban opportunity sites
 - use public land to meet immediate needs
 - generally maintain the existing definition of built-up areas
 - encourage the re-use and redevelopment of already developed land at higher densities, appropriate to the context.
 - enable the sustainable and proportionate growth of some built-up areas – involving the planned release of greenfield land including

- extending some built-up area edges
- around some parish centres, where this contributes to the overall community wellbeing and sustainability of an existing settlement
- limit development around the undeveloped coast and in the countryside to those uses which require a specific location.
- positive consideration of future land-reclamation proposals in St Helier.

7.16. The adoption of this spatial strategy will inform the preparation of policies and proposals within the draft plan.

8. Next steps

- 8.1. The preferred strategy provides a 'gateway' decision on the high-level policy framework, spatial strategy and overall expected direction of the new Island Plan. This will provide a foundation on which the detailed policy development and site selection can progress in the coming months, drawing on a range of evidence and stakeholder input.
- 8.2. The Island Plan Review Team will continue to liaise with the Chairmen's Committee; Environment, Housing and Infrastructure Scrutiny Panel; States Members; and key stakeholders in relation to the development of, basis for, and the issues arising from the preferred strategy.
- 8.3. Ministers will collectively consider aspects of and the overall draft plan. The Environment Minister will also continue to engage with scrutiny panels and other States members, including parish connétables, in this respect.
- 8.4. The draft plan will need to be the subject of two pieces of independent appraisal – one to assess its economic viability and deliverability; the other to assess its sustainability – before it is formally lodged *au Greffe* and published for a 12 week period of public consultation in March 2021.

APPENDICES

- 1. Island Plan Review Programme**
- 2. Strategic policies: scope and direction**
- 3. Extract from Objective Assessment of Housing Need**

APPENDIX 1: Island Plan Review Programme

Stage	Actions	Date	Documents and publications
Stage 1: Scoping and research	<ul style="list-style-type: none"> • Scope and develop the evidence base requirements • Commission reports and studies • Explore initial strategic issues and options • Develop Sustainability Appraisal 	Summer 2019	<ul style="list-style-type: none"> • Issues and options paper published • Consultation on issues and options
Stage 2: Develop draft Island Plan	<ul style="list-style-type: none"> • Consider consultation responses to issues and options • Undertake Sustainability Appraisal • Review evidence base • Evaluate options • Member and stakeholder engagement • Develop draft plan 	Winter 2019	Call for sites
		Summer/ Autumn 2020	Reports and studies published
Stage 3: Consultation and examination	<ul style="list-style-type: none"> • Public consultation on draft Island Plan • draft Island Plan lodged for States Members' amendments • Inspectors' review of draft Island Plan and associated evidence, States Members' amendments and public consultation responses 	Spring 2021	<ul style="list-style-type: none"> • outcome of Call for Sites published • draft Island Plan published and lodged <i>au Greffe</i> • Consultation on draft Island Plan • States Members' amendments
		Summer 2021	<ul style="list-style-type: none"> • Minister publishes response to consultation and amendments

Stage	Actions	Date	Documents and publications
	<ul style="list-style-type: none"> Examination in Public 	Late 2021	<ul style="list-style-type: none"> Independent examination in public Inspector's report published
Stage 4: States debate and approval	<ul style="list-style-type: none"> Consider inspectors' report States debate and adopt Island Plan 	Early 2022	<ul style="list-style-type: none"> Minister publishes response to inspectors' report
	<ul style="list-style-type: none"> Island Plan 2022 to 2024 becomes new policy for planning decisions 	Early 2022	<ul style="list-style-type: none"> States debate Approved Island Plan published

APPENDIX 2: Proposed strategic policies – scope and direction

Proposed strategic policy	Principles	Direction
Spatial strategy	<ol style="list-style-type: none"> 1. make the most efficient and effective use of land already developed 2. concentrate development in and around existing urban centres and services 3. reduce the need and distance travelled, and enable more choice of sustainable, active travel options 4. seek to avoid the development of the undeveloped coast and countryside 5. . positive consideration of future land-reclamation proposals in St Helier 	<ol style="list-style-type: none"> a. focus development in the Town of St Helier (ToSH) <ol style="list-style-type: none"> i. facilitate the development of key urban opportunity sites ii. use public land to meet immediate needs b. generally maintain the existing definition of built-up areas <ol style="list-style-type: none"> i. encourage the re-use and redevelopment of already developed land at higher densities c. enable the sustainable and proportionate growth of some built-up areas –involving the planned release of greenfield land including <ol style="list-style-type: none"> i. extending some secondary built-up area edges ii. around some rural parish centres d. limit development around the undeveloped coast and in the countryside to those uses which require a specific location e. give positive consideration to the potential further land reclamation in St Helier to support strategic objectives; and potentially the creation of new development opportunities.
A productive, diverse and sustainable economy	<ol style="list-style-type: none"> 1. support the maintenance of a productive and diverse economy; and encourage the development of a 	<ol style="list-style-type: none"> a. the provision of adequate land and development opportunities - including the redevelopment of vacant and under-used existing employment land and floorspace – to support local economic development and productivity

Proposed strategic policy	Principles	Direction
	<p>local market for goods and services</p> <ol style="list-style-type: none"> 2. promote and enable small footprint/high value business; and foster innovation 3. enable the creation of attractive and rewarding employment opportunities 4. support and enable the development and enhancement of local skills and training in order to reduce the reliance on in-migration. 	<ol style="list-style-type: none"> b. the protection and maintenance of existing employment land and floorspace for employment-related use, as appropriate, having regard to potential transitional requirements as a consequence of the pandemic c. the protection and promotion of the island’s retail centres, including the maintenance of St Helier as a vibrant, accessible and inclusive mixed-use centre d. the protection of land in the countryside in order to maintain and enhance a viable and sustainable rural economy.
Planning for community needs	<ol style="list-style-type: none"> 1. help to ensure that all islanders have access to and can afford a decent home 2. help to ensure the maintenance and enhancement of community infrastructure that is required to support physical and mental wellbeing and the quality of life of all people across the island, , including within St Helier 	<ol style="list-style-type: none"> a. improve the quality of homes and seek to ensure a supply of residential accommodation that meets island needs across all tenures and types of accommodation b. help to ensure the provision and maintenance of community infrastructure, including: natural green and open spaces; children’s play space; community buildings; and safe walking and cycling routes, and other necessary transport infrastructure c. plan for and enable the development of adequate education; health and care facilities, including Our Hospital; and other public infrastructure that will be required to meet community needs of an ageing population, and services that support the needs of younger people and future generations d. plan for and enable the development of the necessary infrastructure required to support

Proposed strategic policy	Principles	Direction
	<p>and other built-up areas</p> <p>3. seek to enable a diverse and inclusive society; and to ensure that development meets the needs of all islanders at different stages of life and with different abilities – children, young people, adults, families and older people, those in care and care leavers, both able-bodied and disabled</p> <p>4. help to ensure that adequate provision is made for the necessary public and other infrastructure that is required to sustain the island’s community and its development needs</p> <p>5. ensure that islanders are not exposed to undue risk arising from development and the use of land.</p>	<p>the provision of energy, travel and transport to and around the island; water and the management of waste; and the provision of minerals</p> <p>e. protect people from harm including: crime and disorder and the fear of crime; the risks associated with hazardous installations; and the health impacts of soil and air pollution; and seek to ensure the protection of residential amenity.</p> <p>f. enable temporary and permanent developments that are responsive to any necessary public health measures which aim to limit and control the spread of communicable disease.</p>

Proposed strategic policy	Principles	Direction
Placemaking	<ol style="list-style-type: none"> 1. design and the quality of new development at all scales should help create well-designed and well-built places that benefit people and communities 2. the creation of high-quality buildings and places is fundamental to the planning and development process 3. good design is a key aspect of sustainable development; it can create better places, and lead to the improvement of existing environment, in which to live and work; it directly influences people's health and wellbeing; and can help bring communities together 4. good design to achieve spaces that are fit for purpose; durable and 	<ol style="list-style-type: none"> a. Context – responding to and reinforcing valued landscape and townscape character and context, while not preventing or discouraging appropriate innovation or change (such as increased densities). b. Connectivity – promote accessibility and local permeability by making places that connect with each other and are easy to move through, putting people before traffic and integrating land uses and transport c. Community - optimise the potential of the site to accommodate and sustain an appropriate amount and mix of development (including green and other public space) and support local facilities and transport networks. d. Create places that are healthy, safe and inclusive and which help to build community cohesion and resilience e. Climate – creating buildings and places that are resilient to the impacts of climate change and which help to deliver a low-carbon future. f. Character – establish or maintain a strong sense of place. What does the development contribute to the island's distinct identity? g. Change – promote adaptability through development that can respond to changing social, technological and economic conditions.

Proposed strategic policy	Principles	Direction
	aesthetically pleasing.	
Responding to climate change	<ol style="list-style-type: none"> 1. support the transition to a low carbon future in a changing climate 2. contribute to reductions in greenhouse gas emissions 3. minimise vulnerability and improve resilience to the effects of climate change 4. encourage the reuse of existing resources, including the sustainable conversion of existing buildings 5. support renewable and low carbon energy and associated infrastructure. 	<ol style="list-style-type: none"> a. new development should help to reduce greenhouse gas emissions, such as through its location, orientation, means of construction and design b. support and enable a more sustainable transport network in the island where greater priority is given to sustainable travel modes c. apply a sequential, risk-based approach to the location of development – taking into account the current and future impacts of climate change d. new development should: <ol style="list-style-type: none"> i. avoid increased vulnerability to the range of impacts arising from climate change, including flood risk and heat ii. where development might be vulnerable, ensure that risks can be managed through suitable adaptation measures e. safeguard land from development that is required, or likely to be required, for current or future flood management
Protecting and promoting island identity	<ol style="list-style-type: none"> 1. encourage and enable development which promotes and supports the island identity 2. protect and enhance island identity by, in particular, recognising and 	<ol style="list-style-type: none"> a. plan for and enable the provision and maintenance of community infrastructure, that is required to support the development of arts and culture as an integral element of island life and people’s wellbeing; b. seek to ensure that new development, where appropriate, helps to maintain and enhance the island’s identity, and makes a positive contribution to local character and distinctiveness

Proposed strategic policy	Principles	Direction
	<p>protecting cultural heritage assets as an irreplaceable resource which help to define the island's identity, character and sense of place</p> <p>3. have regard to the wider benefits of arts, culture and heritage for people's health and wellbeing; and the island's economy.</p>	<p>c. protect and enhance the island's cultural heritage, having regard to:</p> <ul style="list-style-type: none"> i. the desirability of sustaining and enhancing the significance of cultural heritage assets – listed buildings, places and their settings; and character areas of significance - and securing viable uses consistent with their conservation; ii. the wider social, cultural, economic and environmental benefits that protection of heritage assets can bring;
Protecting and enhancing biodiversity and the natural environment	<ul style="list-style-type: none"> 1. to protect and enhance biodiversity and geodiversity 2. to recognise and protect the intrinsic beauty and character of the island's coast, countryside and its marine environment 3. to have regard to the wider benefits of natural environmental capital and ecosystem services for people's health and wellbeing. 	<ul style="list-style-type: none"> a. to protect and enhance the island's biodiversity and geodiversity, having regard to: <ul style="list-style-type: none"> i. the conservation, restoration and enhancement of priority habitats, and the protection and recovery of priority species ii. identifying and securing opportunities for net biodiversity gains throughout the island's natural and built environments iii. the identification and promotion of ecological networks in order to promote and secure net biodiversity gain b. to protect and enhance valued landscape and seascape character c. to maintain the character of the undeveloped coast and offshore reefs d. to protect trees and woodland.

APPENDIX 3 – Extract from Objective Assessment of Housing Need

Table 3.7 Impact of change in households on dwelling tenure and size					
Tenure	Number of bedrooms	Baseline	Alternative migration scenarios		
		+1000 migration	Net Nil	+325 migration	+700 migration
NonQuals	1	630	-1080	-520	120
NonQuals	2	280	-400	-180	80
NonQuals	3	130	-180	-80	40
NonQuals	4+	70	-90	-40	20
OwnerOcc	1	290	200	230	260
OwnerOcc	2	910	750	800	860
OwnerOcc	3	1,580	1,340	1,420	1,510
OwnerOcc	4+	1,030	750	830	940
QualifiedRent	1	330	140	200	270
QualifiedRent	2	310	50	140	230
QualifiedRent	3	180	-60	20	110
QualifiedRent	4+	110	-80	-20	50
SocialRent	1	650	650	650	650
SocialRent	2	190	180	180	190
SocialRent	3	60	50	60	60
SocialRent	4+	10	10	10	10
Total		6,760	2,230	3,700	5,400