

Introduction

The bridging Island Plan

Planning is about creating a better future: protecting our environment for generations to come and enabling sensitive development that improves the lives of people now and over the long-term. The Island Plan is hugely important for Jersey. It sets out how, as a community, we will create homes; strengthen our economy; protect and improve our environment; provide for a good quality of life; and enhance what's special about our island.

The uncertainty caused by both the Coronavirus pandemic and the recent Brexit transition make it harder to plan for the future. Normally, the Island Plan would provide a ten-year planning framework, but because many issues are particularly uncertain at present, this Island Plan covers a shorter three-year plan period, 2022-2025. After this period a new longer-term plan will be put in place.

Like all Island Plans, this bridging Island Plan has been prepared to comply with the provisions of the Planning and Building (Jersey) Law 2002¹ and to meet high standards. Its preparation has included extensive research and wide-ranging public, political and stakeholder involvement. Under Jersey's plan-led system, it will become the primary consideration in any planning-related decision-making during the plan period².

The bridging Island Plan is the right plan for Jersey now. It provides a unique opportunity to bring forward policies to address known challenges in ways that 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. For the avoidance of doubt, any reference to the Island Plan refers to the bridging Island Plan, unless otherwise specified.

Format of the Island Plan

The Island Plan comprises two parts involving this report and a proposals map.

This report is formed of four volumes. Each volume is broken into chapters, which share a common theme and address a set of issues.

Each chapter contains **policies** to guide development, and **proposals** for further work. The proposals respond to and will help make progress with the issues addressed in that chapter. Strategic proposals, which are set out in this chapter only, identify those broader initiatives to be addressed as priorities to inform the next Island Plan:

Volume one – introduction and strategic proposals

- Introduction and context
- Strategic proposals

Volume two – strategic framework

- Strategic policies
- Places

¹ Part 2, [Planning and Building \(Jersey\) Law 2002](#), as amended by the [Covid-19 \(Island Plan\) \(Jersey\) Regulations 2021](#).

² Article 19(2) [Planning and Building \(Jersey\) Law 2002](#)

Volume three – managing development

- General development
- Natural environment
- Historic environment
- Economy
- Housing
- Managing emissions
- Community infrastructure
- Travel and transport
- Minimising waste and environmental risk
- Utilities and strategic infrastructure
- Minerals extraction and solid waste disposal

Volume four – performance and delivery

- Delivery, monitoring and review

Each of the policies in the plan is supported by a written justification that explains the considerations that have applied in developing the policy. Policies are shown in bold type, within a blue box and are identifiable by a policy number and specific title. Proposals are found in a green box.

The policies of the Island Plan have been carefully formulated to achieve the sustainable development of the island with a balance between social, environmental, and economic considerations. The policies do not stand in isolation and should be read together, with other relevant policies and the proposals, as a holistic response to the needs and issues facing the island, which is supported by the evidence collated to support preparation of the plan.

The proposals map shows the spatial aspects of policies across the island.

The Island Plan, and all the evidence that informs it, is available online at www.gov.je/islandplan. Printed copies of the Island Plan, including the proposals map, are also available in the Library.

How to use the Island Plan

One of the stated purposes of the Planning and Building (Jersey) Law 2002³ is to conserve, protect and improve Jersey's natural beauty, natural resources and general amenities, its character, and its physical and natural environments. Accordingly, it is the intention of this law to ensure that when land is developed the development is in accordance with a development plan that provides for the orderly, comprehensive and sustainable development of land in a manner that best serves the interests of the community: this is provided by the Island Plan.

The law requires that all material considerations must be taken into account in the determination of an application for planning permission and that, in general, planning permission shall be granted if the development proposed is in accordance with the Island Plan⁴.

³ See Article 2 [Planning and Building \(Jersey\) Law 2002](#)

⁴ Article 19(2) [Planning and Building \(Jersey\) Law 2002](#)

When considering whether a development proposal is in accordance with the plan, it is important to have regard to the plan as a whole and not to treat a policy or proposal in isolation. It is likely that several policies will be relevant to any development proposal and that some policies can, seemingly, pull in different directions. This is not a flaw in the system, but simply a product of a complex and wide-ranging plan, and a reflection of the natural tensions that arise in seeking to meet the community's economic, social and environmental objectives. It is for the decision maker to carefully balance the planning merits of a development proposal with the policy requirements of the plan.

Where policy conflicts do arise, a reasoned judgement must be made as to whether the wider benefits of a proposal outweigh any policy considerations provided by the Island Plan. This should only happen where there is considered to be sufficient justification to do so, as set out in the Planning and Building (Jersey) Law 2002.⁵

Preparation of the Island Plan

Initial work to review the Island Plan commenced in 2019, at the time when a 10-year plan was intended. In response to the impact of the Coronavirus pandemic, the Minister for the Environment, in consultation with other ministers, proposed the development of a bridging Island Plan to cover a shorter period, 2022-25. This decision, and the process to arrive at it, have been considered by the Environment, Housing and Infrastructure Scrutiny Panel⁶.

The Island Plan Review has enjoyed the benefit of regular engagement from States Members, stakeholders and the public in a range of ways and at different times. Key engagements have included the following.

Strategic Issues and Options consultation

The Government of Jersey held a public consultation, over a three-month period from 10 July 2019 to 11 October 2019, on the strategic issues and options the island is facing, providing islanders with an opportunity to have their say.

The consultation was structured around four areas: the spatial strategy, a sustainable island environment, a sustainable island economy and sustainable island communities. Consultation documents were published in two formats: a shorter summary paper (with 27 questions)⁷ and a full technical paper (with 47 questions)⁸. In total, 2,254 responses were received to the consultation from a variety of sources. A findings report was published following the consultation⁹.

Ministerial and States Member engagement

The Council of Ministers has been closely engaged with the development of the bridging Island Plan, and individual ministers have been engaged in the development and review of policy direction where they are of relevance to their portfolios, to ensure a plan that is integrated across government.

⁵ Ref to Article 19(3) [Planning and Building \(Jersey\) Law 2002](#)

⁶ [S.R.3/2021](#) Environment, Housing and Infrastructure Scrutiny Panel: An analysis of the revised Island Plan Review process

⁷ [Strategic Issues and Options: summary consultation](#)

⁸ [Strategic Issues and Options: technical consultation](#)

⁹ [Strategic Issues and Options Findings Report](#)

In July 2020, the Minister for the Environment requested an in-committee debate to provide all States Members with an opportunity to discuss, and express their views about, the changes that were necessary to enable the delivery of a bridging Island Plan and the key planning challenges that the plan should seek to address. The discussion was informed by a report presented by the Minister for the Environment and was followed by an outcome summary report¹⁰ and ministerial response.

States Members have also been engaged, through their parishes, to explore key parish and policy issues, in a series of briefing meetings during the policy development of the plan.

Call for sites

A call for sites was undertaken in late 2019. Over 500 sites were put forward both for development and for protection from development. All sites were assessed and prioritised, and the associated information is published alongside the Island Plan at www.gov.je/islandplan.

The process of site analysis and selection was robust, objective and professionally led. Political oversight of the process and final selection of all sites, including those for affordable housing, was provided by the Minister and Assistant Minister for the Environment.

Council of Ministers, in reviewing the draft Island Plan, offered their support for the approach taken to respond to the need for affordable housing but took no role in site assessment or selection.

Preferred Strategy Report

Having considered the views raised during the Strategic Issues and Options consultation in 2019, the views of the States Assembly raised during the in-committee debate in 2020, the wider established priorities of government, and the emergent evidence base, the Minister for the Environment developed and published a Preferred Strategy report¹¹ for the bridging Island Plan in October 2020.

The Preferred Strategy established a high-level vision for the bridging Island Plan; its strategic policy framework; the spatial strategy for development; the planning assumption; and provided an analysis of housing needs and delivery mechanisms, following its consideration and endorsement by the Council of Ministers.

Covid-19 (Island Plan) (Jersey) Regulations 2021

On 10 February 2021 the States Assembly agreed the Covid-19 (Island Plan) (Jersey) Regulations 2021. These regulations¹² provided the legal route to progress the bridging Island Plan in the current term of government, and are supplemented by a revised Island Plan Order¹³, published on 22 March 2021, which sets out, amongst other things, how the examination in public will progress and the processes for amendments by States Members

¹⁰ [Island Plan Review: in-committee debate – output summary](#)

¹¹ [Preferred Strategy Report \(2020\)](#)

¹² Part 2, [Planning and Building \(Jersey\) Law 2002](#), as amended by the [Covid-19 \(Island Plan\) \(Jersey\) Regulations 2021](#)

¹³ [Planning and Building \(Covid-19 Bridging Island Plan\) \(Jersey\) Order 2021](#)

and Minister for the Environment. These changes to the legally prescribed process of undertaking an Island Plan Review have enabled a bridging Island Plan to be developed and brought forward.

Evidence base development

The Island Plan Review is supported by an extensive and up to date evidence base that addresses the key issues to which the revised Island Plan is required to respond to. All the relevant evidence is published and available online¹⁴.

A wide range of engagement was undertaken to inform the evidence base studies, including direct stakeholder engagement and liaison, focused workshops, online consultations, focus groups and surveys. Each commissioned study explains the methodology followed to prepare the report including how the work has engaged the public and key stakeholders.

Next steps

The draft bridging Island Plan has been lodged *au Greffe*, for consideration by States Members in order that they might propose amendment to it and published for public consultation for a period of three months.

The Minister for the Environment will consider all representations made in relation to the draft plan and will publish an initial response to them before an Examination in Public, into the key issues raised during consultation, is held by an independent planning inspector, in the autumn of 2021.

The inspector will issue a report to the Minister for the Environment, setting out his findings. The Minister, and States Members, will be able to consider the report, with a view to submitting further amendment relative to the issues raised by the inspector, before the Island Plan is debated by the States Assembly, scheduled to take place in March 2022.

Superseded plans and guidance

For the avoidance of doubt, all previous development plans will be superseded by the approval of the bridging Island Plan, and specifically:

1. Revised 2011 Island Plan (2014); and
2. St Mary's Village Development Plan (1994).

It will also be necessary to develop new supplementary planning guidance to support and complement the function and interpretation of the Island Plan and to comprehensively review and refresh existing guidance where required¹⁵.

The vision and purpose of the bridging Island Plan

The Island Plan promotes the sustainable development of land and buildings to maintain and enhance Jersey as a special place, that faces future challenges; values and protects its environment and unique island identity; and acts with confidence to provide the homes, employment and infrastructure that sustain community and family life.

This vision is informed by the legal and strategic purpose of the Island Plan; the ambitions set by ministers and the States Assembly in the Common Strategic Policy and other key

¹⁴ [Core evidence base documents for the Island Plan Review 2021](#)

¹⁵ see Volume four: performance and delivery

strategic plans; and the findings of key public and stakeholder consultations, including Future Jersey¹⁶.

Future Jersey tells us what people in the island want to see retained and improved in years to come. Progress in each area is measured and regularly reported, through a set of indicators, as part of Jersey’s Performance Framework¹⁷. Because the Island Plan shapes the physical context for the island, it links closely with all parts of the performance framework: the policies and proposals of the Island Plan aim to support the sustainable wellbeing of islanders and balance environmental, community and economic matters as suggested in the figure (see figure 1 Jersey Performance Framework) below.

More information about how the Island Plan contributes to improving sustainable wellbeing of islanders and how the performance of the plan is monitored and reviewed are set out in volume four: performance and delivery.



Figure 1 – Jersey Performance Framework

The bridging Island Plan is a unique response to a unique context. Initially, the Island Plan Review undertook to prepare a new long-term Island Plan. This review became delayed, in 2020, because resource was redirected to support the public health response to the Covid-19 pandemic and workstreams were disrupted and delayed. Rather than return to the preparation of a long-term Island Plan, which would delay publication of the plan to a later date, the bridging Island Plan provides the means to make important progress in key policy areas now. Bringing forward a shorter plan also recognises that, while there is always uncertainty in seeking to plan for the longer-term, that uncertainty is currently

¹⁶ [Future Jersey](#)

¹⁷ [Jersey's Performance Framework: measuring sustainable wellbeing](#)

heightened by the potential impacts of the Coronavirus pandemic and changes associated with new post-Brexit arrangements.

With these intentions in mind, there are three specific and strategic reasons to pursue a bridging Island Plan now rather than retain the current Island Plan until a point in the coming years when it can be replaced by another long-term Island Plan.

The bridging Island Plan provides an early response to current challenges, especially to address the availability and affordability of homes; strengthen protection from inappropriate development; respond to climate change; improve our transport systems; and make improvements to the Town of St Helier¹⁸, particularly for residents.

The bridging Island Plan represents an initial response to the period of significant uncertainty brought about by the Coronavirus pandemic and Brexit transition, which can be iterated and improved in the subsequent Island Plan, in particular, to respond to the then current economic and population contexts.

The bridging Island Plan builds stronger foundations for the next long-term plan by establishing updated strategic policies; updating and refining the spatial strategy for where in the island development should be focused; and setting out clear strategic proposals for the work that will ensure the next Island Plan can best respond to major long-term sustainability challenges.

These three strategic reasons are suggested in the figure below (Figure 2: The basis for the bridging Island Plan) and expanded further in this section. Together, they justify the conclusion that, 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.

Bridging Island Plan

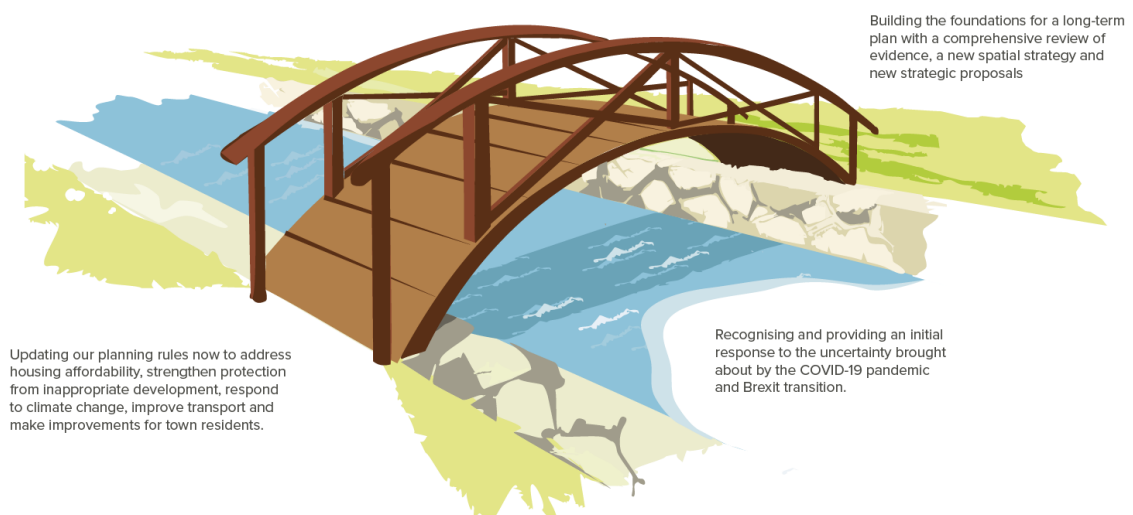


Figure 2: The basis for the bridging Island Plan

An early response to current challenges

This Island Plan will be considered by the States Assembly in 2022. While the plan provides direction on relevant policy matters which contribute to achieving sustainable

¹⁸ See Volume two: strategic framework, places: Plan for Town

development and is informed by robust evidence and extensive consultation, it has been possible to prepare the plan by this date because of a number of factors: States Members agreed that the plan could be lodged, and amendments proposed to it at the same time as the public consultation period¹⁹; and the shorter timeframe of the plan means that matters that need to be dealt with on a longer-term horizon can be reserved for the next Island Plan, which in turn has allowed resources to be prioritised to prepare this plan more quickly.

A key justification for bringing forward a bridging Island Plan is that it provides an early response to current challenges. The Strategic Issues and Options consultation, undertaken in 2019, included an online survey, 12 parish drop-ins, stakeholder briefings, town pop-up stalls, a youth engagement programme, and a range of other events. The consultation attracted over 2,000 responses, which described the challenges that islanders want to see addressed.²⁰

The updated planning policies made in this Island Plan help make earlier progress on many of the challenges identified in the Strategic Issues and Options consultation. In particular, the Plan seeks to respond to the key issues set out below.

Making homes more affordable for islanders

The Objective Assessment of Housing Need²¹ (OAHN) makes clear that more homes are required in the coming years as people live longer and household size continues to reduce, as well as to respond to increases in the island's population. The OAHN also concludes that there is particularly significant demand for larger three- and four-bedroom homes for purchase.

Data from the Jersey House Price Index, compiled by Statistics Jersey, shows: that the price of an average house in Jersey was c.£630,000 in 2020, up from c.£430,000 at the start of the previous Island Plan period in 2011; and that the average cost of a four bedroom family home is currently £1.164m²². During the same period, the Housing Affordability Index, which indicates whether a working household with average (mean) income can purchase a property affordably, declined by 11%²³.

The approach adopted for this Island Plan Review, as set out in the Island Plan Preferred Strategy²⁴, 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 over the years 2011-2019. Statistics Jersey has estimated that, because of this, a net shortfall of 1,800 homes had arisen over this period. The Preferred Strategy concludes that, while some of the demand associated with this shortfall may have been met by existing supply in the housing market, it is reasonable to assume that the remaining unmet demand is contributing to the housing pressures (and associated increases in price) currently experienced in Jersey. This additional demand should be reflected in the number homes being planned for in the Island Plan (the housing requirement).

¹⁹ Amendments are changes that are proposed to the plan by States Members. This was enabled by the adoption of the [Covid-19 \(Island Plan\) \(Jersey\) Regulations 2021](#)

²⁰ [Strategic Issues and Options Findings Report](#)

²¹ [Objective Assessment of Housing Need](#) (2019)

²² [House Price Index: Fourth Quarter](#) - 2020

²³ [Housing Affordability Index](#)

²⁴ [Preferred Strategy Report](#) (2020)

The Minister for the Environment recognised this issue in discussion with the Environment, Housing, and Infrastructure Scrutiny Panel in September 2020, saying:

we are in a serious, serious problem about housing issues. I think that is probably one of the biggest areas that probably the majority of States Members are really focusing on the new plan²⁵.

The bridging Island Plan takes steps to address the provision of and affordability of homes, including:

- making provision for up to 4,150 new homes (up to the end of 2025) that will provide a range of types, sizes and tenures to meet the island's different housing needs;
- within the overall provision of homes, planning for up to 1,500 new affordable homes, both for rent and purchase, and aligning the plan with new housing policies that will update and improve the range of affordable housing products and ensure all affordable homes are allocated through the Housing Gateway in line with relevant criteria;
- allocating sites for new affordable homes by extending main and local centres
- introducing a new 'right-sizing' policy recognising that many residents might choose to move – and release larger houses to become affordable family homes – if they could remain within their local community;
- providing enabling policies that are aligned to the Government of Jersey's Public Estates Strategy²⁶ to maximise the use of publicly owned land and buildings to support the development of new homes;
- planning to address 50% of the identified backlog of homes over the plan period.

Making improvements for Town residents and placemaking

The Island Plan introduces new policy to ensure that homes are built to high standards and in an environment that better supports the wellbeing of residents, particularly in Town²⁷.

The Spatial Strategy (set out in Policy SP2 – Spatial strategy, strategic policies chapter) retains the policy of recent Island Plans to focus and encourage the majority of development in Town. The plan, however, recognises that this strategy, over time, has the potential to create additional challenges for Town residents if it is not also possible to continually improve the experience of town living by, for example, increasing access to open space, reducing the impact of vehicles on the townscape, protecting the character of Town, and improving the public realm and access to community facilities including good schools. This challenge is reflected in the findings of the Jersey Opinions and Lifestyle Survey 2018²⁸, which found that just 36% of St Helier residents were satisfied with their local neighbourhood, compared to 81% of residents of rural parishes and 63% of largely suburban parishes.

²⁵ [Bridging Island Plan Review Public Hearing: The Minister for the Environment](#) (29th September 2020)

²⁶ [Island Public Estate Strategy 2021-35](#)

²⁷ The extent of Town is defined on the proposals map. It extends from and embraces Grève D'Azette in the east, first Tower in the west, and up to Mont à L'Abbé, Vallée des Vaux and St Saviour's Hill in the north. Its southern edge is where it meets the sea.

²⁸ [Jersey Opinions and Lifestyle Survey \(2018\)](#)

The bridging Island Plan recognises that the sustainable development of the island hinges on the sustainable development of Town and sets out, for the first time, a strategic Plan for Town (see volume two: places – Plan for Town). This plan advances eight strategic concepts, underpinned by detailed policies, that seek to create a town that is better for people to live in, with more open space; good homes; an improved built environment and the schools, jobs and other community facilities and services that support a better quality of life and the creation of a better place.

To support the Plan for Town, the Island Plan proposes the introduction of a Sustainable Communities Fund to invest in improvements over the long-term by capturing a small proportion of the value created when planning consent is given, and recognising that it is legitimate to use this to make wider improvements to benefit the local communities in which development occurs.

Responding to the climate emergency and improving transport

One of the most significant opportunities presented by the bridging Island Plan is to make early progress in strengthening the response that the planning system can make to the climate emergency. The States Assembly has declared a climate emergency and agreed a Carbon Neutral Strategy that has set in train a people-powered approach to establishing how Jersey should become carbon neutral.

Alongside the development of this process, the bridging Island Plan takes steps – which are in line with the existing commitments of the adopted Energy Plan²⁹ – to ensure carbon emissions are reduced throughout the life cycle of new development (from design through to deconstruction). These policies include increased environmental design standards for new developments and support for carbon sequestration schemes and ground mounted solar arrays, where appropriate.

Protecting and improving the natural environment is a key part of the island's transition to net zero. The bridging Island Plan reflects the importance of biodiversity throughout the island and seeks to ensure that new development protects and improves green infrastructure and networks.

The bridging Island Plan also integrates the new Sustainable Transport Policy³⁰. It provides support for related initiatives and strengthens the requirement for contributions to support bus services and to deliver new walking, cycling and wheeling infrastructure as part of new developments.

Strengthening protection from inappropriate development

The bridging Island Plan is informed by two important new studies into the landscape and seascape character of Jersey and the urban character of St Helier³¹. Both studies reflect, in detail, the many valuable places, settings and contexts throughout the island and its territorial waters, and how best to manage development that might affect them, to protect their special character.

The bridging Island Plan increases the protection afforded to the special and unique assets in the island from inappropriate development. The expanded Coastal National Park extends the highest level of protection to sensitive landscapes around the Jersey coast and

²⁹ See: [Jersey Energy Plan](#)

³⁰ [Sustainable Transport Policy](#)

³¹ See: [IPR core evidence base](#)

its waters; new historic environment policies recognise and strengthen the protection afforded to the settings of listed buildings; and the policy regime for the green backdrop zone is retained and enhanced.

An initial response to the pandemic and Brexit

The impacts and aftermath of the Coronavirus pandemic will be the defining story of the bridging Island Plan period. The pandemic dramatically impacted the quality of people's lives, individually and as a community. The implications will be significant and long-lasting. It will take many years to fully understand the impact the pandemic has had on our children's education, on our economy, our social habits and behaviours and, perhaps most significantly, on our mental and physical health and wellbeing. These downstream effects will impact the long-term trends and sustainable wellbeing of Jersey in ways that will need to be understood and responded to in future years.

The pandemic has had pronounced and direct impacts on our relationship with our physical environment, both for good and bad. The initial period of lockdown in 2020 was experienced very differently by people in smaller homes and with less access to outside space. Similarly, new experiences, such as extended working from home, or periods of self-isolation, are made much easier through access to additional and separate space within a home. At the same time, many people across the world reported feeling a new affinity for the natural environment and recognised how different environments and road space could feel with the prolonged absence of vehicles.

Our experience has highlighted the significance of the quality of our homes and our neighbourhoods to personal and community wellbeing. The bridging Island Plan recognises this and seeks to ensure that the design and quality of new homes and access to open space is improved as an integral and important part of new development. These new experiences give glimpses of potential future economic, social, and environmental changes. The period during which the bridging Island Plan was prepared – throughout late 2020 and early 2021 – was too early to determine whether these experiences might be sustained and embed themselves as new behaviours that require a planning policy response; or, whether they may be replaced by previous behaviours or, over time, create entirely new behaviours and requirements.

In many cases, the pandemic brought to a much wider community, new experiences that reflect the strategic policy objectives of the Island Plan for many years. The experience of reduced peak time congestion (down almost 13% in 2020 compared to previous years) and increased use of the island's cycling and walking infrastructure may accelerate the shift to an entirely sustainable transport system by 2030, as set out in the Sustainable Transport Policy. In these instances, the Island Plan seeks to accelerate the process of establishing these new experiences as shared and sustained behaviours.

If the Coronavirus pandemic had not occurred, it is likely that the defining story of the first years of the Island Plan would be, in large part, determined by the impacts of Brexit. In December 2020, the States Assembly voted to participate in the agreement between the UK and the EU on their future relationship³². This maintains, as closely as possible, the conditions of Jersey's current EU trading relationship and ensures that goods destined for the EU are treated fairly, without tariffs, and equal to those goods originating from the UK.

³² P.170/2020: [UK-EU trade and economic cooperation agreement – inclusion of the Bailiwick of Jersey](#)

Following Brexit, the period of this Island Plan will see significant changes to the current system for managing immigration into the Common Travel Area (CTA) and migration from within the CTA to Jersey. These include both the introduction of a new points-based immigration system by the UK Government (and the introduction of related and comparable controls within Jersey) and the introduction of a migration control policy by the Government of Jersey³³.

The development of the Island Plan has been able to progress in tandem with the States Assembly's consideration, debate and approval of a migration control policy, and the anticipated future publication of a population policy, because the impact of that new policy on the overall population of the island will not take effect for some time. In the meantime, the primary impacts on migration are likely to stem from the post-pandemic and post-Brexit economic and immigration contexts, rather than the adoption and implementation of local policy which seeks to further regulate migration.

The new migration control policy and future population policy, together with the results of the 2021 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. Strategic Proposal 1, below, commits to undertaking the necessary work, based on these developments, to establish a long-term planning assumption, to inform the requirement for homes, for the next Island Plan.

Building the foundations for a long-term Island Plan

The bridging Island Plan looks forward to the strategic requirements of the island over time; sets a vision of a sustainable future; and helps build the foundations for a long-term Island Plan to follow, from 2025.

The Island Plan Review, initiated in 2019, was intended to prepare a long-term Island Plan for the period 2021-30. Because of this, the programme to review and update the evidence base to which the bridging Island Plan responds has been comprehensive, thorough and forward-looking.

Several key studies, on which successive previous Island Plans and planning policy have been based, have been updated and are expected to remain relevant into and potentially beyond this, and the next, Island Plan period. These include the award-winning Jersey Integrated Landscape and Seascape Character Assessment³⁴ and the updated St Helier Urban Character Appraisal³⁵.

Steps have been taken to ensure that the bridging Island Plan is informed by a longer-term view of infrastructure needs, for example, through the development of the Minerals, Waste and Water Study³⁶ and the Infrastructure Capacity Study³⁷, which consider requirements over several decades and a 15 year period respectively. The Island Plan also provides a policy response to the Shoreline Management Plan³⁸, which models and responds to sea-level rise over three epochs during the next 100 years.

³³ P.137/2020: [Migration control policy](#)

³⁴ [Jersey Integrated Landscape and Seascape Character Assessment](#)

³⁵ [St Helier Urban Character Appraisal](#)

³⁶ [Minerals Waste and Water Study](#)

³⁷ [Infrastructure Capacity Study](#)

³⁸ [Shoreline Management Plan](#)

This longer-term evidence base is used to shape detailed policies to take effect now. Importantly though, the evidence is also used to inform the strategic policy framework for the Island Plan, to which all development proposals should accord. The strategic policy framework is also informed by the Strategic Issues and Options consultation³⁹ and by a range of other strategies and policies, including those referenced in the strategic context section below. Because these strategic policies are rooted in a wide-ranging and long-term analysis, it is likely that they will remain, in large part relevant to the next Island Plan.

The bridging Island Plan cannot address all the strategic matters relevant to the next Plan period. In order to make progress in areas that are currently uncertain, or are simply emergent, the Island Plan sets out for the first time, a series of strategic proposals, which frame and direct further work that will be required to ensure the next Island Plan can appropriately plan for a longer-term period.

As the diagram below suggests, the Island Plan now forms part of the Government of Jersey's adopted long-term strategic framework, which guides decision-making, performance review and improvement across Jersey's public service. The development of this framework, which was established as a priority in the Common Strategic Policy 2018-22⁴⁰, expects that these strategic proposals, as well as proposals made elsewhere in the Island Plan will, in turn, be included as priorities for delivery in future Government Plans – providing additional resources where required – and consequently included in future departmental operational business plans in coming years.

³⁹ [Strategic Issues and Options Findings Report](#)

⁴⁰ [Common Strategic Policy 2018-22](#)



Figure 4: Performance management and business planning standards and principles

Strategic context

The strategic context to the bridging Island Plan is wide-ranging, and the inter-relationships between different policies, aims and objectives is complex. The Island Plan has been developed with regard to, and in many cases, helps to progress this wider strategic context. In some cases though, the policies of the Island Plan may be in tension with certain other ambitions, for example, where planning policy performs a necessary regulatory function.

This section summarises a selection of key strategic documents that help set the context for the bridging Island Plan. It does not summarise the additional evidence base that has been prepared to inform, and is published alongside, the Island Plan; key elements of that evidence base are summarised in the context of the relevant policies set out in later sections.

Sustainable wellbeing

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.⁴¹ Sustainable wellbeing is a 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 supports a focus on long-term progress rather than short-term intervention, and enables community, environmental and economic indicators of wellbeing to be measured.

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.

The majority of people surveyed in Jersey support focusing the Island Plan on promoting sustainable wellbeing⁴², as defined by the Future Jersey community vision⁴³ published in March 2018, which sets out a range of priorities across ten social, environmental and economic areas. It presents an aspirational vision for how people want Jersey to develop in the coming 20 years.

Future Jersey highlights that islanders want Jersey to be developed in a sustainable way and that all community, environmental and economic needs are met without being detrimental to the island. Through the sustainable development of the island, the Island Plan is committed to ensuring that the needs prioritised in Future Jersey will be met for all islanders both in the short and long-term. This requires the Island Plan to have sustainability objectives, each of which are interdependent, and assessed based on the following themes:

- community – seeking to protect and improve the quality of people’s lives and the island’s cultural heritage and identity;
- environment – seeking to protect and improve the quality of Jersey’s urban, rural and marine environments and biodiversity;
- economy – seeking to maintain and improve the performance of the local economy within sustainable limits.

Jersey’s Performance Framework launched in January 2020, provides the means to monitor progress towards the Future Jersey vision of sustainable wellbeing. Volume four sets out how the approach to monitoring, delivery and review of the Island Plan now integrates with the Jersey Performance Framework.

An independent Sustainability Appraisal of the Island Plan has also been undertaken and is published alongside the plan. The Sustainability Appraisal provides a more detailed

⁴¹ [Jersey’s Performance Framework: measuring sustainable wellbeing](#)

⁴² [Strategic Issues and Options Consultation – findings report](#), p.15

⁴³ [Future Jersey](#)

understanding of sustainability and how the different facets of this have informed the development of the Island Plan.

Common Strategic Policy

The Common Strategic Policy, which details the priorities agreed by this Council of Ministers for its current term of office, was agreed unanimously by the States Assembly in December 2018.⁴⁴ The Island Plan incorporates each of the strategic priorities, as outlined below.

We will put children first:

- ensuring that our children have access to high-quality infrastructure – such as schools, health care facilities and community amenities;
- helping address the provision and affordability of family homes in Jersey; and
- maintaining and creating play, open and green space that serves the needs of children, present and future, and will contribute to helping children be safe, active, social and imaginative. Access to high quality and safe places for children and young people to play is critical to the development of the physical, emotional, social and cognitive skills that they need to thrive.

We will improve islander's wellbeing and mental and physical health:

- ensuring that all development must consider the potential health, wellbeing and wider amenity impacts on Jersey's residents;
- prioritising the development of a new hospital and safeguarding the 'Our Hospital' development site agreed by the States Assembly; and
- supporting new and extended community, health and social care facilities; access to Jersey's coast and countryside; and major improvements and access to the walking, cycling, public transport and active travel networks. Focusing on these areas in the plan is critical to the maintenance of vibrant and sustainable communities, whilst also supporting islanders' physical and mental wellbeing.

We will create a sustainable vibrant economy and skilled local workforce for the future:

- giving priority to the maintenance of a productive and diverse economy, with support for new and existing businesses, particularly where they encourage the development of a local market for goods and services, attract small footprint/high value business and foster innovation;
- safeguarding key economic infrastructure throughout the post-pandemic period;
- supporting new, extended, or improved tourism or cultural attractions in the built-up area, where the development positively contributes to the range and quality of the island's tourism and cultural offer; and
- ensuring that the distribution and accessibility of additional educational facilities and future educational sites meet the needs of the community they serve, and that they are otherwise sustainable and adaptable to future generations and changing needs.

We will reduce income inequality and improve the standard of living:

- making a substantial response to the current challenging cost of housing, which is a major determinant of the standard of living available to islanders; and

⁴⁴ [Common Strategic Policy 2018-22](#)

- making provision for the supply of at least an additional 750 homes per year to meet the housing needs of Jersey's population, including over 1,000 affordable homes, and supporting the provision of homes to meet specific housing needs.

We will protect and value our environment:

- protecting and improving the island's natural environment, its landscapes, coastline, seascapes, biodiversity, and geodiversity;
- extending the Coastal National Park to provide the highest level of protection to Jersey's most sensitive coast and countryside locations; and
- integrating with and supporting the Carbon Neutral Strategy and Sustainable Transport Policy.

Population context and planning assumption

Understanding current and potential future population levels is of central importance to Jersey and the bridging Island Plan. 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.

While the shorter-term bridging Island Plan is intended to mitigate the risks of making long-term plans in a volatile context, it is still based on the best available data. An agreed planning assumption was set out in the Preferred Strategy, that has directly informed policy development and site selection.⁴⁵ Strategic Proposal 1 of the plan commits to the further work necessary to ensure that a more detailed long-term planning assumption, based on the latest 2021 Census data and adopted population policy, is available to inform the next Island Plan from 2025 (see Strategic Proposal 1 - Development of a long-term planning assumption, later in this chapter).

Current population of Jersey

As of the year-end of 2019, the estimated resident population of Jersey was 107,800⁴⁶. During 2019, the resident population increased by around 1,100 people: net inward migration accounted for 1,000 of this annual increase; whilst natural growth (births minus deaths) accounted for the remainder. Natural growth in 2019 was the lowest since 2002.

The average increase in the resident population of the island between 2011 and 2019 was 1,000 per year, with licensed employees⁴⁷ and their dependents accounting for approximately 40% of this population. In comparison, between 2001 and 2010, the average increase in population was 650 per year, with licensed employees and their dependents representing approximately 43% of this. The global financial crisis had a significant impact on inward migration between 2008 and 2015, with inward migration reducing by over 40% from 2008 levels in this period. Inward migration peaked at 1,500 in 2015 and has steadily decreased in the years since, to 1,000 in 2019.

Changes in the island's economic performance directly impact inward migration, regardless of licensed or registered employees. 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 volatility.

⁴⁵ [Preferred Strategy Report](#) (2020)

⁴⁶ [Jersey Resident Population: 2019 Estimate](#)

⁴⁷ [Residential and employment statuses and what they mean](#)

The switch to a shorter-term bridging Island Plan is a means of ensuring that progress in key planning policy areas can be made whilst ensuring sufficient strategic agility to respond to the impacts of the pandemic and Brexit over time.

Age

The 2016 Population Projections⁴⁸ found that, by 2035, the number of Jersey residents aged over 65 could reach up to 30,000 (depending on the changes migration could bring), which could account for 29% of the total population. This is a change of over 60% in residents aged over 65, with Jersey currently having 18,500 residents aged over 65. As of 2019, 17.1% of Jersey’s population was aged 65 and over, an increase from 16.3% in 2015.

The diagram below, compiled by Statistics Jersey, shows the age and sex of Jersey residents as at the end of 2019.⁴⁹

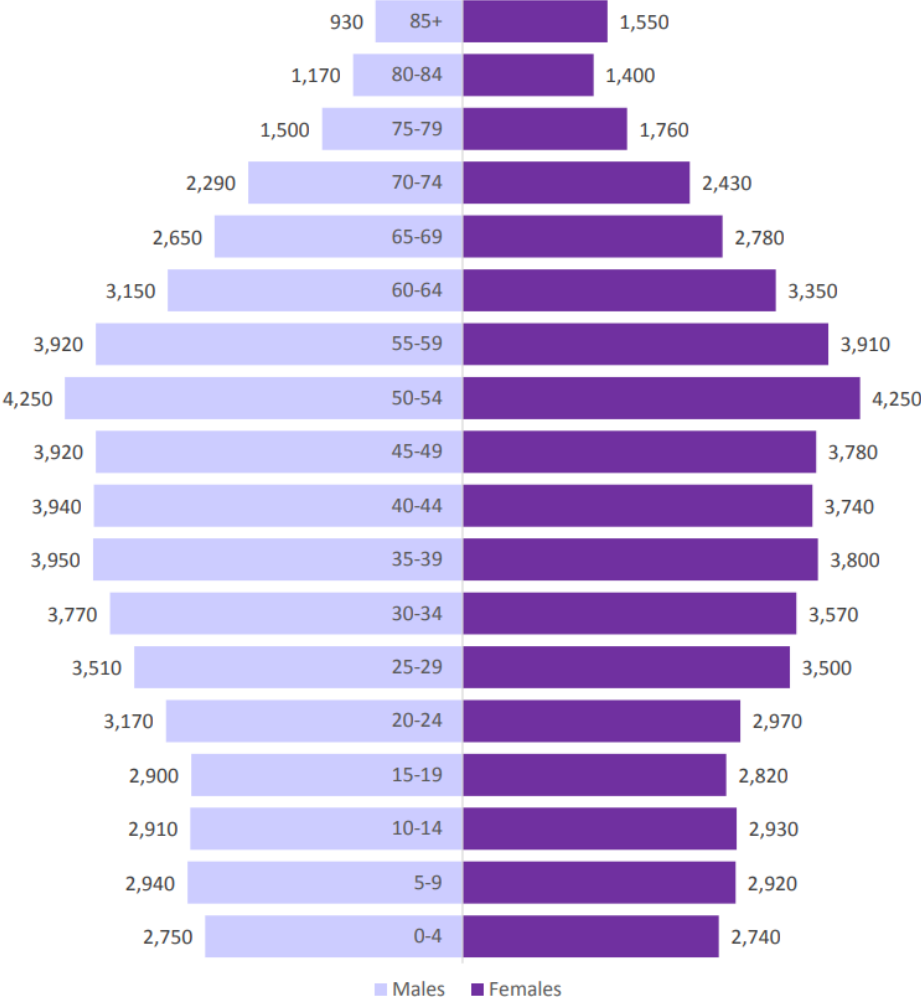


Figure 5 – Jersey population by age and sex, year-end 2019

Dependency ratio

The ‘dependency ratio’ refers to the ratio of non-working age to working age persons in the population. A high dependency ratio represents a high number of non-working age being supported by a relatively small number of working-age residents.

The dependency ratio in Jersey was 50% at year-end 2015⁵⁰. The dependency ratio in the future will depend on patterns of net migration, as well as wider natural change in

⁴⁸ [2016 Population Projections](#)

⁴⁹ [Jersey Resident Population: 2019 Estimate](#)

⁵⁰ [2016 Population Projections](#)

population of the island. The 2016 Population Projections report looked at the overall impact of a range of net migration levels on the dependency levels. It found that, by 2035, the dependency level could be anywhere between 57% and 71% depending on the level of migration.

Planning assumption

As the Preferred Strategy makes clear, the issue of population is fundamental to the Island Plan – since it provides the starting point for understanding how many homes need to be planned for and is linked to the likely scale of economic activity (which in turn affects the demand for employment premises/floorspace). A reasoned and justifiable planning assumption ensures that appropriate provision of land and development opportunities are made in the Island Plan in order that a sustainable balance is struck overall. The shorter timescale of the bridging Island Plan is proposed precisely because it is very difficult, currently, to model the shape of future population trends.

The Island Plan Review has considered evidence from Statistics Jersey and across government departments in order to ensure that the planning assumption is fully informed – particularly about population dynamics and changes to the demographic profile of our community – and, where appropriate, the anticipated impact of future government policies.

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.

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 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 migration, as shown in table 1 below.

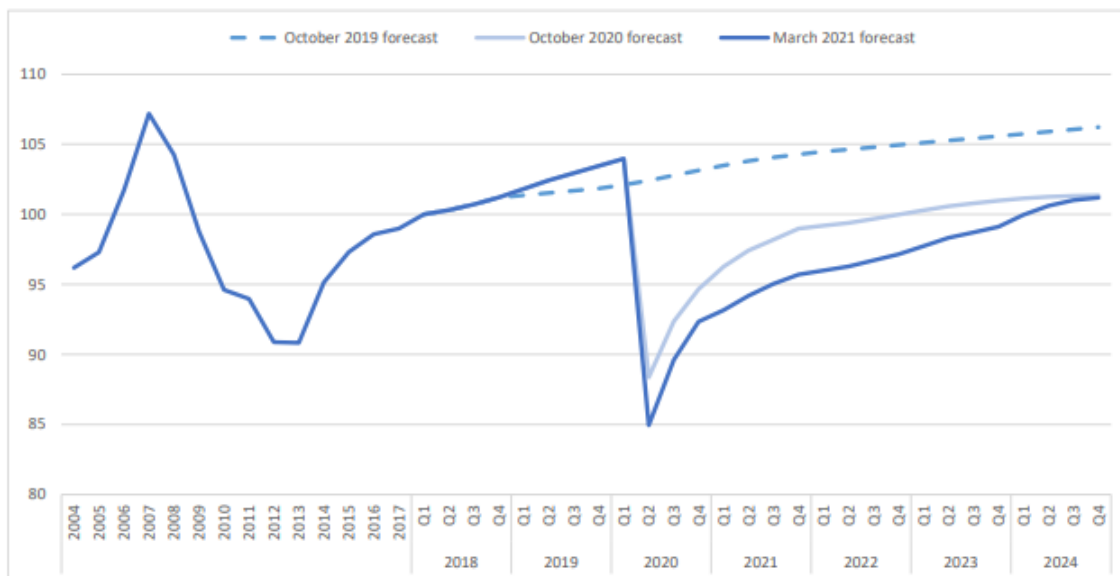
Calendar year	Natural growth	Net inward migration	Total annual change
2015	220	1,500	1,720
2016	200	1,300	1,500
2017	130	1,200	1,330
2018	100	1,100	1,200
2019	90	1,000	1,090
		5 year average	1,370

Table 1: Change in Jersey's resident population, 2015 – 2019

As in previous years, the level of net inward migration will largely determine the total annual change in population over the Island Plan period. In turn, the level of net migration is largely interdependent with the level of employment growth over the period of the plan.

Following the Coronavirus pandemic, the economic outlook for the period of the bridging Island Plan looks challenging. The graph below shows illustrative forecast of the Fiscal Policy Panel's updated economic assumptions from April 2021.⁵¹

⁵¹ [Economic assumptions \(gov.je\)](#)



Index of real gross value added (GVA), Q1 2018=100

Figure 6: Fiscal Policy Panel – economic growth projections, April 2021

The current period is likely 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. 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.

The situation for 2022-2025 is further complicated by the challenge of assessing the future direction of economic and immigration trends in the post-Brexit period. 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.

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. 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.

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 1,100 per year (see table 1 above). In this case, the average over the coming five years would be expected to fall to around 700 people per year. Such a figure is supported by consideration of:

- 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.

The bridging Island Plan, therefore, assumes 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. 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 is more likely because of the additional restrictions in place over winter 2020-21, both in Jersey and elsewhere, and the potential for a European third wave in 2021; and
- will gently rise during the plan period of 2022-25 as the economy recovers.

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.

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 2021-25, based on an average annual increase of +800 per year.

Providing homes in Jersey

The planning system has a key role to play in addressing the availability and cost of housing in Jersey. The bridging Island Plan is informed by the emergent recommendations of the Housing Policy Development Board⁵² and by the Island Public Estates Strategy²⁶, and establishes a policy framework to ensure the right open market homes are built and makes provision for the sustainable development of affordable housing.

The Objective Assessment of Housing Need⁵³ (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 OAHN also assesses the type of housing required against all tenures (non-qualified; owner occupier; qualified rent; social rent). Applied to an average annual population growth scenario of +800 per year, the OAHN methodology suggests that around 6,100 homes will be required over the ten-year plan period 2021-30.

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 unqualified sector⁵⁴. 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

⁵² [Housing Policy Development Board](#) (report pending)

⁵³ [Objective Assessment of Housing Need](#) (2019)

⁵⁴ Statistics Jersey analysis (2019).

experienced in Jersey, and creating additional demand that should be reflected in the Island Plan housing requirement.

Recognising this net shortfall raises the ten-year housing requirement to 7,900. It is proposed that the target should be profiled evenly over the coming ten years, with 50% of the target – or 3,950 homes – to be met in the first five years, 2021-25. This includes homes already under construction and the duration of the bridging Island Plan period.

Based on the work of the Housing Policy Development Board, it is considered appropriate to conclude that, as a minimum, Government might seek to address 5% of the identified housing requirement (rounded to 200 homes) through non-development policies (i.e. policies that make better use of the existing housing stock).

The Island Plan, therefore, assumes a housing development target, over a five-year planning period (2021-25), of 3,750 homes, of a type and tenure consistent with the OAHN analysis. This requirement arises 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.

Government Plan

The Government Plan⁵⁵ is a detailed one-year plan with a rolling four-year approach that brings together income and expenditure decisions, for the 12 months ahead, as part of a four-year financial outlook. It sets out how public money will be spent to deliver the day-to-day business of government and on strategic priorities and areas for improvement, including the prioritisation of infrastructure delivery.

The Island Plan Review has been funded through and developed alongside both the 2020-23 and 2021-24 Government Plans. This includes work to explore long-term future infrastructure requirements in order to inform future Government Plans and financial forecasts. The initial phases of this work are published as an Infrastructure Capacity Study, and future phases will form a long-term infrastructure plan.⁵⁶

Future Economy

The bridging Island Plan is, in part, a response to the challenge of understanding short-term economic trends given the impacts of the Coronavirus pandemic and changes brought about by Brexit. Nevertheless, certain medium- and long-term trends are likely to continue to impact the shape of Jersey's economy. These include wider global trends, such as the impacts of new technologies and changes in consumer behaviours and in Jersey's dominant finance sector.

Work to frame and respond to these trends, in the form of a future economic framework for Jersey, is underway. The Island Plan has been developed alongside this work and has also developed and assessed scenarios for key employment land uses, which are published as part of the evidence base⁵⁷.

Carbon Neutral Strategy and Energy Plan

The Carbon Neutral Strategy⁵⁸ sets out a people-powered approach to respond to the aim for Jersey to be carbon neutral by 2030. The strategy builds on the progress made

⁵⁵ [Government Plan](#)

⁵⁶ [Infrastructure Capacity Study](#)

⁵⁷ [Employment Study \(2020\)](#)

⁵⁸ [Carbon Neutral Strategy](#)

through the Pathway 2050: An Energy Plan for Jersey⁵⁹ and sets out a strategic framework of principles and a central planning scenario.

The Island Plan incorporates the principles set out in the Carbon Neutral Strategy and presents policies that respond to the requirements of the Energy Plan. In particular, new policies are included to support the delivery of renewable and low carbon energy schemes and innovative forms of infrastructure and land use which aid a transition to carbon neutrality. Carbon emissions will be reduced further; new development will be required to respond to sustainable buildings standards and secure enhanced energy performance ratings; and all new development must accord with the energy hierarchy, which in order of importance, seeks to minimise energy demand, maximise energy efficiency, utilise renewable energy, and utilise low carbon energy.

Sustainable Transport Policy

In 2020, the States Assembly agreed a Sustainable Transport Policy⁶⁰ (STP) framework that aims to create an entirely sustainable transport system by 2030. This requires a fundamental re-think of how road space is allocated in Jersey, how the transport system is funded and what benefits are secured in return. This vision, of a transport system that supports the sustainable wellbeing of future generations, is closely related to the Carbon Neutral Strategy and key to securing a wide range of environmental, social and economic improvements.

The Island Plan incorporates and requires development to respond to the ten decision making principles for a sustainable transport system. The plan also supports future improvements to walking, cycling, public transport and active travel networks, and evolutionary reform to parking standards, as these improvements are delivered.

Children and Young People's Plan

The Children and Young People's Plan 2019 to 2023⁶¹ is a fundamental new plan for Jersey's children, young people and families, which aims to make sure Jersey is the best place to grow up and also improves everyday lives. The physical environments in which our children grow up can have a profound effect on their physical and emotional wellbeing, often to the same extent as the social and economic factors that are traditionally understood to influence children's life outcomes.

A range of steps were taken to ensure the voice of young people was heard in the Strategic Issues and Option consultations, and the Island Plan introduces a range of new policies to shape development in ways that improve family life. A Children's Rights Impact Assessment⁶² of the Island Plan has been produced and published alongside the Island Plan as part of the government's ongoing commitment to progress the implementation of the UNCRC.

Disability Strategy

The Disability Strategy for Jersey⁶³ sets out the proposed priorities and actions to help ensure the key outcome of the strategy: that people living with disability enjoy a good quality of life.

⁵⁹ [Pathway 2050: An Energy Plan for Jersey](#)

⁶⁰ [Sustainable Transport Policy](#)

⁶¹ [Children and Young People's Plan 2019 to 2023](#)

⁶² Children's Rights Impact Assessment: see [IPR core evidence base](#)

⁶³ [Disability Strategy](#)

The Island Plan incorporates and supports the priorities and action plans set out within the Disability Strategy by:

- prioritising the development of accessible infrastructure across the island;
- ensuring increased specialist housing is developed; and
- responding to the need for new and extended community, health and social care facilities.

Air Quality Strategy

The Air Quality Strategy⁶⁴ adopted in 2013, supports the principle that ‘everyone in Jersey should have access to outdoor air without significant risk to their health and that there should be minimal impacts from air pollutants on the environment of Jersey or our neighbours’. Air quality in Jersey is generally good, and this is due to the location of the island and the prevailing weather conditions, together with the structure of the local economy and the limited amount of industrial and manufacturing processes that take place on-island. The current air quality monitoring programme⁶⁵ demonstrates that pollution levels in Jersey are below thresholds of concern to human health and the environment⁶⁶.

The Island Plan incorporates the Air Quality Strategy through the formulation of planning policies which require planning applications to be determined in a manner which:

- supports measures to improve current air quality;
- discourages polluting activities;
- ensures that air quality issues associated with proposed developments are carefully and appropriately considered;
- determines the location of developments which may give rise to air pollution (either directly or from traffic generated) through dust, smell, fumes, smoke, heat, radiation, gases, steam, or other forms of airborne emissions; and
- prevents an increase in pollution, or allows for mitigating air quality impacts from new developments, particularly in areas already suffering high levels of air pollution.

Retail in Jersey

The Retail in Jersey⁶⁷ report was published in 2018 to consider the challenges facing retail in Jersey, as it is one of the largest industries in the island. The report’s recommendations were all encompassing and prioritised the local growth of the sector in the years to come, be that through adjustments to retail tax or adapting existing infrastructure to increase consumerism. The Island Plan acknowledges the recommendations in the Retail in Jersey report and aims to prioritise the retail sector through:

- identifying distinct areas, including the core retail area and town centre of St Helier and a defined centre for Les Quennevais, to help maintain and enhance retail vitality and viability; and ensure and enable complementary land uses and activities;
- maintaining and improving the core retail area, St Helier town centre and Les Quennevais centre by supporting the development, refurbishment or extension of

⁶⁴ [Jersey Air Quality Strategy](#)

⁶⁵ [Air quality monitoring in Jersey](#)

⁶⁷ Economic Affairs Scrutiny Panel: [Retail in Jersey](#)

existing retail premises, whilst also only supporting proposals for a change of use away from retail under specific circumstances;

- not supporting development proposals that would result in the loss of employment land unless there are overwhelming reasons to do so;
- prioritising pedestrian activity to maintain and encourage the growth of a vibrant core in the cultural and economic heart of St Helier; and
- improving transport development to increase accessibility of retail to all.

The previous Jersey Retail Strategy (2006) has also been considered, as well as regard to the emergent new retail strategy for the island, which is in development.

Sport Strategy

The Inspiring an Active Jersey Strategy⁶⁸ seeks to increase islanders' physical activity by 10%, by 2030 and help create more active people for a healthier island. The strategy sets a vision in which Jersey will be a healthier, more productive and fairer society by being one of the most physically active populations in the world. The recently published Inspiring Active Places consultation⁶⁹ builds on the strategy to explore options for major improvements in the island's sports facilities and infrastructure.

The Island Plan has been developed alongside the research that has informed Inspiring Active Places and provides a number of specific policies and site designations to enable its future conclusions to be brought forward to benefit the community. The plan aims to support the improvement and redevelopment of current sporting facilities, whilst also supporting new sporting facilities that provide a more efficient and effective use of the buildings and facilities to the benefit of the community.

Jersey Culture, Arts and Heritage Strategic Review and Recommendations

The Jersey Culture, Arts and Heritage Strategic Review and Recommendations⁷⁰, published in 2018, sets out the findings and recommendations from an independent review into Jersey's culture, art and heritage. The findings and recommendations encapsulate five core themes, that culture, art and heritage:

1. are central to learning and growth, helping everyone realise their potential;
2. support long, healthy and active lives;
3. shape vibrant, inclusive, attractive communities and places;
4. drive local economic development and position Jersey externally; and
5. underpin an outstanding quality of life.

The Island Plan understands the importance of culture, art and heritage in islanders' lives, which is why it is incorporated in the strategic policies of the plan. The plan will promote and protect the island's distinct identity and support culture, art and heritage through ensuring that:

- all development should seek to protect and where possible improve the historic environment where it impacts listed buildings and places; and conservation areas (once introduced), and their settings;
- the provision of public art, through the development process, will be sought;

⁶⁸ [Inspiring and Active Jersey](#)

⁶⁹ [Inspiring Active Places consultation](#)

⁷⁰ [Jersey Culture, Arts and Heritage Strategic Review and Recommendations](#)

- the provision of new or enhanced cultural facilities to support and grow the island’s cultural and creative industries and support the island’s cultural diversity is encouraged; and
- existing cultural infrastructure is protected from redevelopment or changes to other uses.

Strategic Proposals

As set out above, a range of steps have been taken to look forward to the strategic requirements of the island over time, set a vision of a sustainable future and help build the foundations for a long-term Island Plan after the bridging plan period. This Island Plan though clearly cannot address all the strategic matters relevant to the next Plan period. In order to make progress in areas that are currently uncertain or are emergent, the Island Plan also sets out, for the first time, a series of strategic proposals.

These strategic proposals are intended to frame and direct further work that will be required to ensure the next Island Plan can appropriately plan for a longer-term period. They address thematic and spatial issues that are pertinent to good plan-making in Jersey. Unlike the strategic policies of the Island Plan, where a degree of consistency and continuity are likely over the long-term, these strategic proposals are issues that are specific to the current context and plan period, and they will need to be explored and understood over that period in order to inform the next Island Plan. They are also issues that inter-relate and hence need to be progressed in alignment and in some cases in sequence.

Each Government and States Assembly is responsible for directing resources and policy priorities during its term of office. The intention, in raising certain key issues as strategic proposals and subjecting these, through the plan-making process, to wide-ranging public and political scrutiny and consideration, is to endow these proposals with greater weight and significance in future prioritisation exercises, such as the development of a Common Strategic Policy, following the next general election.

Strategic Proposal 1 – Development of a long-term planning assumption

Each Island Plan responds to an agreed planning assumption. A long-term planning assumption is used to inform (usually) ten-year requirements for homes, economic development and infrastructure along with other community needs, such as accommodating an ageing population and meeting education and health care requirements. 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.

The role of the planning assumption in informing the bridging Island Plan is somewhat different, because a shorter timescale has been proposed due to the difficulty, in the midst of the on-going Coronavirus pandemic, to model the potential future population and demand figures. This is particularly the case as previous in-migration to Jersey has been very closely driven by economic performance.

It has also been difficult to establish a long-term planning assumption for the bridging Island Plan because of uncertainty about the impacts of post-Brexit arrangements for

immigration into the Common Travel Area, and because of on-going work to implement new migration controls and to develop a new population policy for Jersey.

The new Migration Control Policy (P.137/2020, as amended⁷¹), amongst other things, creates more responsive set of controls on the number of migrants who acquire the right to settle permanently in Jersey and removes the automatic 'graduation' from one Control of Housing and Work Law permission to another. The Migration Control Policy also requires the development of a further population policy, which should consider a range of issues and be updated annually.

The long-term Island Plan that will follow the bridging Island Plan will benefit from these new arrangements as they will provide both a policy basis and justification to inform the planning assumption of the next Island Plan, and the necessary controls to ensure that future migration trends are more likely to broadly reflect this assumption.

However, as the final report of the Migration Policy Development Board⁷² makes clear (based on pre-pandemic work to develop a long-term planning assumption as part of the Island Plan Review) there are tensions inherent in setting an effective population policy, of which (as suggested in the diagram below) sustainable development considerations are only one part.

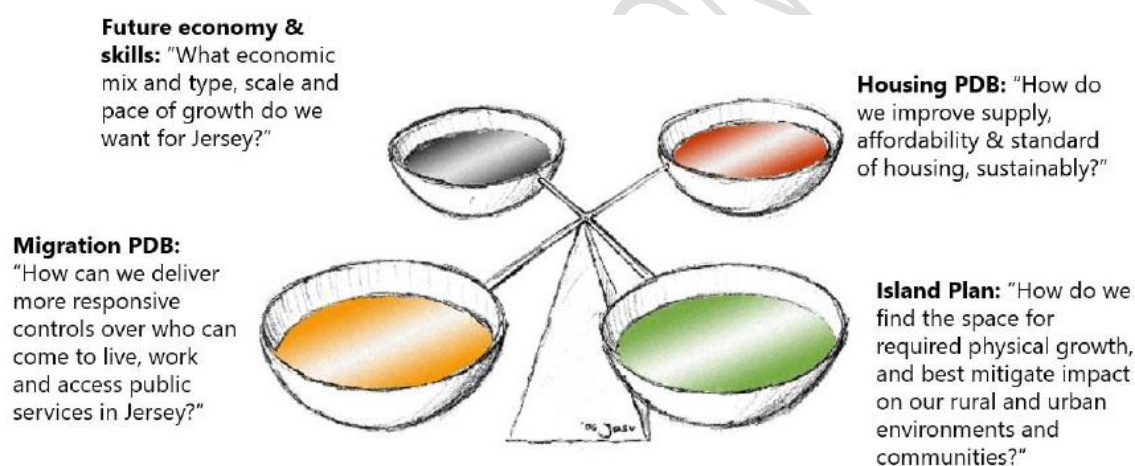


Figure 8: Key issues in delivering sustainable development

Recognising this, it will also be important to respond to wider plans being developed as part of the Future Economy Programme, which will produce a range of outputs to shape the long-term future direction of the Jersey economy, with a focus on productivity and skills. The programme will, amongst other things, provide decision support tools to help guide decisions about investments in fiscal, land use and other policy areas, such as skills, infrastructure and technology, in order to support increases in productivity.

In the same way that the Coronavirus pandemic has impacted on the Island Plan Review, it has also impacted on the development of migration, population, economic and skills policies, leading to some delays, but also increasing the uncertainty to which those policies must respond. Nevertheless, the bridging Island Plan period presents the opportunity to properly conclude work in each of these areas and to establish the legal basis for new migration controls, in order that these might be synthesised into a long-term planning assumption for the next Island Plan.

⁷¹ P.137/2020: [Migration control policy](#)

⁷² [Migration Policy Development Board; final report \(2020\)](#)

Strategic Proposal 1 - Development of a long-term planning assumption

Ministers will work together to develop a long-term planning assumption, with a clear and comprehensive methodology, for the next and future Island Plans, that reflects and responds to:

- the migration control policy;
- the forthcoming population policy;
- the findings of the Future Economy Programme; and
- the future development of wider relevant policies, including skills.

Strategic Proposal 2 – Understanding the long-term requirements of Jersey’s energy market

Strategic energy policy in Jersey is currently framed by two key documents: Pathway 2050: An Energy Plan for Jersey⁷³ and the Carbon Neutral Strategy (CNS).⁷⁴ Pathway 2050 outlines 27 targeted actions to reduce energy demand; ensure energy security and resilience; and ensure energy is affordable. The CNS establishes a people-powered approach, which includes Jersey’s Climate Conversation and the Citizens’ Assembly on Climate Change⁷⁵ to inform a new Carbon Neutral Roadmap for the island. The CNS has a narrower strategic scope than the Energy Plan⁷⁶. It, therefore, builds on the existing energy affordability and security of supply policies established by Pathway 2050, which were the product of several years research and development.

The CNS is clear that accelerating our departure from the use of hydrocarbons, and significantly increasing the use of centrally generated electricity using existing infrastructure, is the only realistic, achievable and affordable route to carbon neutrality in Jersey by 2030. If this strategy is ultimately adopted by the States Assembly in the Carbon Neutral Roadmap, it provides an important frame of reference for wider energy policies and subsequent infrastructure investments that will need to be considered in further detail.

The CNS recognises that our current electricity model has served the island well, and provides an affordable, reliable and secure product with strong investment and a good return to shareholders (note that the Government of Jersey is the 62% majority shareholder of Jersey Electricity with the annual dividend being returned to general revenue). The current low carbon supply of electricity contributes to lower overall per capita carbon dioxide emissions in Jersey, which the CNS recognises, are a necessary foundation for any rapid progress to carbon neutrality.

The current model of centralised energy importation and distribution from the European grid may continue to be the right one for Jersey in the future. However, the strategic implications of this approach for other energy policies, and the strategic implications, space use and infrastructure considerations of other energy policy choices on the current approach – under a scenario of rapid electrification – will need to be explored. Key considerations for this will include:

⁷³ [Pathway 2050: An Energy Plan for Jersey](#)

⁷⁴ [Carbon Neutral Strategy](#)

⁷⁵ [Climate Conversation and the Citizens’ Assembly on Climate Change](#)

⁷⁶ The scope of the CNS and the time available to prepare it were both set by the States Assembly in [P.27/2019](#)

- establishing the objectives and requirements of the energy market in Jersey over the long-term, which will encompass the drive to become carbon neutral but also explore:
 - views on the future significance of, and routes to, a sustained and appropriate degree of energy sovereignty in the post-Brexit period;
 - the role of renewable energy generation in the Jersey context (including utility-scale generation in terrestrial waters) and in particular the impact that increased local generation might have on energy affordability over both the medium- and long-term; and
 - islanders' expectations and ambitions for decentralised energy systems in the future; and
- work, stemming from P.88/2017⁷⁷, to review the current Electricity Law.

Regardless of the specific expectations of the forthcoming Carbon Neutral Roadmap, and the impact of this on issues of energy affordability and sovereignty, it is also clear that rapid changes in technology, and the increased potential to democratise power generation, distribution and storage, will create future changes to our energy system and the way we chose, use and distribute energy. Future Island Plans will need to respond to this challenge. Building on the progress and strengthened policies set out in this Island Plan, this strategic proposal ensures that the next and future Island Plans can respond to these changes and plan confidently for future energy infrastructure requirements.

Strategic Proposal 2 - Understanding the long-term requirements of Jersey's energy market

The Minister for the Environment, in discussion with the Minister for Infrastructure and the Minister for Economic Development, Tourism, Sport and Culture, will explore the range of issues necessary to understand the long-term requirement of Jersey's energy market including:

- spatial and land use requirements for future Island Plans;
- infrastructure requirements; and
- regulatory or other economic requirements.

Ministers will engage with a range of stakeholders to undertake this work, including the Jersey Energy Forum.

Strategic Proposal 3 – Creating a marine spatial plan for Jersey

Jersey's planning system extends to the marine environment, and the bridging Island Plan includes a policy regime that responds to known and potential future developments related to a range of activities such as offshore utility scale renewable energy development, aquaculture and shoreline management. The bridging Island Plan also seeks to ensure that the impact of development on areas of high marine biodiversity and seascape value is given significant weight in the decision making process, and extends the boundary for the Coastal National Park to best regulate and limit development of the unique intertidal zones and offshore reefs.

The marine environment is, however, a complex ecosystem where a range of activities and interests occur which extend beyond the sphere of the planning process and the regulation of development activity. These include energy generation and transmission,

⁷⁷ See: [P.88/2017](#)

recreation, fishing, shipping and conservation. There is, therefore, a significant and strategic opportunity to strengthen the planning and management regime for the marine environment. To best manage and to secure the comprehensive and sustainable use of marine and coastal resources, it is proposed to develop a marine spatial plan for the island's waters.

A marine spatial plan enables the development of a coordinated and coherent approach to governance and decision making in the marine environment by creating a framework to ensure that decisions are consistent with Government policies and objectives for all aspects of its use and management. Such a plan has a range of potential benefits across different policy areas, providing a context for new approaches to decarbonisation; environmental and economic regulation; and potential economic and energy sector opportunities.

The preparation and adoption of a marine spatial plan requires and enables extensive consultation and engagement with all interested stakeholders including government, technical experts, professional bodies, commercial interests, and community groups. It is proposed that this work is undertaken during the period of the bridging Island Plan in order to inform policies for the management of development activity as part of the next Island Plan Review.

Strategic Proposal 3 – Creating a marine spatial plan for Jersey

The Minister for the Environment will undertake further work to develop a Marine Spatial Plan **before 2025**, to organise human and marine resources and activities in Jersey's territorial waters and **in particular, to develop a network of marine protected areas, which will** be consistent with overall environmental, economic and social objectives.

This work will inform the policies of the next iteration of the Island Plan and support coordinated policy development and decision-making on all aspects affecting the marine environment.

Strategic Proposal 4 – A west of island planning framework

Successive Island Plan spatial strategies have sought to direct the majority of new development towards St Helier. The spatial strategy for the bridging Island Plan continues this overall approach, which meets a range of sustainable development objectives and makes best use of previously developed land in order to protect the island's undeveloped countryside and urban open space. However, in setting out the Plan for Town (see Volume 2: Places), the bridging Island Plan also recognises that there are limits to the sustainability of this strategy and that it can create challenges for the built environment of the town and the quality of life experienced by its residents.

The question of where best to accommodate development in Jersey will remain a key consideration of future of Island Plans regardless of the outcome of current debates about population policy. The Objective Assessment of Housing Need makes clear that, even with a net-zero migration outcome over the period 2021-2030, 2,200 new homes would still be required to account for changes in ageing and dwelling patterns within the existing resident population. Development to support future economic, community and other infrastructure needs would also be required during and beyond the period of the next Island Plan.

The Sustainability Appraisal⁷⁸ of the bridging Island Plan considers the merits and demerits of alternative spatial strategies for the Island. In simple terms, these involve either accommodating development within the built-up area; new development in previously undeveloped locations, either in a scattered fashion or via the creation of a new settlement; or development of the marine environment through land reclamation, as has happened consistently with the growth of St Helier.

The bridging Island Plan begins a process of evolving the island's spatial strategy in order to respond to these longer-term considerations. In particular the spatial strategy introduces a settlement hierarchy that establishes Les Quennevais as the island's secondary urban centre, and the Places section of the plan introduces a policy regime to support this designation that seeks to protect and enhance the range of local services currently provided in the area.

Building from this base, it will be possible to further explore future planning options and opportunities linked to Les Quennevais and neighbouring areas including Jersey Airport. Such work should explore the full range of land use considerations, including the appropriate role of these areas in meeting the island's long-term residential and economic development needs; placemaking considerations; key opportunity sites including use of the former Les Quennevais school site once its intended use by Health and Community Services has concluded; any infrastructure considerations; travel and transport matters; and the importance of developing Les Quennevais in a manner that supports and complements the role of St Helier as the island's primary urban area and core retail location.

The work would need to engage closely with local and island-wide stakeholders, including the parishes of St Brelade and St Peter, and others, to consider the strategic issues and options for such a planning framework. The framework may take a range of forms, depending on progress and resource availability over the period of the bridging Island Plan, including working papers, published studies and supplementary planning guidance.

Strategic Proposal 4 – A west of island planning framework and area masterplans

The Minister for the Environment will bring forward a west of island planning framework together with a series of more focused masterplans, for Les Quennevais and adjacent areas, including Jersey Airport, as appropriate, in consultation with key stakeholders, including the parish, landowners, local residents and their children, and businesses. The planning framework will be brought forward first, with specific area-based masterplans, as necessary, to follow during the bridging plan period up to 2025.

Strategic Proposal 5 – An infrastructure roadmap for Jersey

Despite its near-term focus, the bridging Island Plan benefits from being informed by a comprehensive Infrastructure Capacity Study.⁷⁹ The study represents the first two phases of a three-phase project to develop a long-term infrastructure plan for Jersey and has, together with the Minerals, Waste and Water Study,⁸⁰ informed a range of policies set out in this plan.

⁷⁸ See – www.gov.je/islandplanreview

⁷⁹ [Infrastructure Capacity Study](#)

⁸⁰ [Minerals Waste and Water Study](#)

Infrastructure may be defined in physical, environmental and social terms, across a broad range of scales. Infrastructure ranges in form: from large scale assets such as major roads and airports; to community services and open space. Infrastructure, in all its forms, is an essential requirement to support society and to achieve Jersey's wider aspirations.

A strong network of utilities, transport connections, energy supply and digital connectivity are a prerequisite for the future. This hard infrastructure must, however, be supported by social infrastructure, in the form of education, health, community space, leisure and sports facilities, open space and emergency services facilities. This social infrastructure encourages social interaction and cohesiveness, promotes learning, improves health and wellbeing, and assists in creating equitable, vibrant, liveable places.

In addition, the creation and strengthening of the island's green infrastructure networks and new transport modes and technologies is important in achieving sustainable development for the island. Green infrastructure assets can take many forms including open space, play space, trees, and hedgerows. Green infrastructure enhances wellbeing, provides access to outdoor recreation, improves health and wellbeing, enhances biodiversity, influences food and energy production, results in urban cooling and builds resilience to climate change.

Accommodating infrastructure is a particularly acute challenge for a small island like Jersey. The large opportunity costs associated with allocating land for infrastructure, and the proportionately large scale of major infrastructure investments relative to the island's economy and public finances, means the decisions about the sequencing and timing of necessary future infrastructure are very significant.

The Infrastructure Capacity Study will, therefore, be used as a basis for future scenario and foresight planning to inform an Infrastructure roadmap for Jersey. The roadmap will inform short and long-term strategic policymaking and help to understand the costs and consequences for the environment, economy and wider society of key future infrastructure choices.

Because of the concentration of critical island infrastructure in the area, and in order to respond to the recommendation of the Public Accounts Committee⁸¹, this work will also address options for the long-term development of La Collette.

The development of the infrastructure roadmap will need to be informed by: the outputs of the work, identified at Strategic Proposal 2, to understand the long-term requirements of the energy market in Jersey; as well as the work, recognised in Strategic Proposal 1, to develop a new population policy and associated long-term planning assumption.

⁸¹ [Public Accounts Committee: Fuel Farm Lease Renewal](#) (2016)

In Jersey, as in many other jurisdictions, much of the necessary operational expertise, as well as the responsibility to maintain and invest in the island's critical infrastructure, rests with organisations at arms-length of government. As such, it will be particularly important to engage with all these stakeholders, those within government, the public and States Members, in developing the infrastructure roadmap.

Strategic Proposal 5 – An infrastructure roadmap for Jersey

The Minister for the Environment, in discussion with other ministers including the Minister for Infrastructure and Minister for Economic Development, Tourism, Culture and Sport, will develop an infrastructure roadmap for Jersey.

The roadmap will build on the Infrastructure Capacity Study to inform short and long-term strategic policymaking and help to understand the costs and consequences for the environment, economy and wider society of key future infrastructure choices.

The roadmap will address options for the long-term development of La Collette.

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