

5 Economy

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E: Introduction

5.1 Jersey has a vibrant economy that has seen significant growth in recent decades. Its Gross National Income per capita is considerably higher than the UK's and compares favourably with that of Europe generally. The Island enjoys almost full employment. The main sectors of the economy are:

- financial services and investments;
- industry and warehousing;
- retailing and other services;
- tourism;
- agriculture and fishing;
- transport and distribution; and
- government administration.

5.2 Jersey saw significant changes to its economy in the last few decades of the 20th century. Its success is based to a large extent on the financial services sector (banking, trust and company administration, fund management, accountancy and related legal activities). Over the past 20 to 30 years it has grown to the extent that it now accounts for over half (53%) of the total economic activity in Jersey and employs a quarter (25%) of the workforce. Other business activities (7%), public administration (7%) and wholesale and retail (6%) are the next biggest contributors to economic activity. The public sector comprises 12% of total employment.

5.3 Jersey's more traditional industries, such as agriculture and tourism, make up about 1% and 3% of total economic activity and employ 3% and 10% of the workforce respectively, with a relatively large proportion of these being seasonal workers. They are no longer the dominant industries they used to be, but are still important for their contributions to the environmental and social fabric of the Island.

5.4 Unemployment has drifted up to 3% (February 2011) although the strength of the Jersey economy means that this is still a relatively low unemployment figure by international standards. Participation rates of the working age population - particularly amongst women - are also relatively high in Jersey (men 89%, women 81%).

5.5 The main economic indicators which measure the value or size of the whole Jersey economy are GVA (Gross Value Added) and GNI (Gross National Income). Jersey (RPI) inflation has been similar to, or below, the UK in recent years and currently (December 2010) is 2.3%. Living standards in Jersey (as indicated by a GNI per capita) are among the highest in the world.

5.6 Analysis by the Economics Unit and Fiscal Policy Panel, suggests that the economic outlook is for weak to moderate growth real GVA for 2011 and beyond. This comes after a difficult period in which the economy slowed significantly in 2008 with a moderate contraction in real GVA in 2009 and 2010.

5.7 The Island will face a number of economic challenges in future years whether it is from the ageing population or a new economic and financial world post 'credit crunch'. This will require that economic policy remains focused on delivering economic growth based on productivity improvements with low inflation. This will be necessary if the standard of living of Islanders is to continue to improve and we are to deliver high quality public services with low corporate and personal taxes.

States of Jersey Strategic Aims

5.8 A key aspect of States economic policy is to encourage competition to support economic growth through improved productivity and lower inflation. Competition encourages firms to innovate by improving efficiency, puts downward pressure on costs and results in a better deal for consumers.

5.9 The key economic objectives of the States of Jersey are economic growth with low inflation and employment opportunities for local people. The ability to achieve these targets is constrained because Jersey, like many island economies, only has a limited amount of land and labour at its disposal. It is therefore vital that we make better use of the resources we have. This means improving productivity (producing more with the same resources) across the economy if the Island's economic objectives are to be met. The Island Plan can play an important part in facilitating productivity improvements as well as meeting other environmental and social objectives.

5.10 One of the key actions from the Council of Minister's new Anti-inflation Strategy is that the Economic Development (ED) Minister is to advise the Planning and Environment Minister on how the new Island Plan can better facilitate productivity improvements, in particular, how the planning process can take account of market signals to ensure that land and buildings are put to their best economic use.

5.11 In order to meet these objectives, it is essential that planning policies provide a positive and supportive framework for employment-related development. Listed below are key economic aims and objectives from the States Strategic Plan (2009-14) that are most directly relevant to the Island Plan policies.

- identify policy options to stimulate the economy and consider making the States more responsive in areas such as planning and the Regulation of Undertakings and Development Law;
- continue work to diversify the economy, support new and existing businesses, attract low footprint/high value business from elsewhere, and foster innovation;

- recognise the contribution made by the Tourism and Agriculture industries to a diverse society;
- test economic growth plans for sustainability to ensure they do not diminish our natural capital.

5.12 By means of the careful application of its land use planning and development control policies, the Department of the Environment can contribute significantly to the achievement of these aims.

E: Objectives and indicators

5.13 The Vision for Jersey is of an Island within which 'economic development and prosperity are sustained and residents can be employed in fulfilling work'. The objectives for the new Island Plan relating to the economy are to:

Objective E 1

Economy objectives

1. Encourage a balanced and more diverse economy and assist all sectors of the economy to adapt to change in the market place.
2. Provide sufficient land to meet the requirements of the office and industrial sectors;
3. Enable the growth and expansion of existing businesses through extensions, relocation and infrastructure improvements;
4. Provide for the land-use needs of emerging industries;
5. Protect and enhance the centre of St Helier as the focus of commercial, retail and evening activities;
6. Support local employment in urban settlements and key rural settlements;
7. Support the provision of shopping and services within local centres; and
8. Ensure that new commercial, retail and industrial developments take place in locations which are accessible, make best use of land that has previously been developed, avoid physical constraints and minimise the impact on the environment.

5.14 The policies set out in the new Island Plan for industry and commerce aim to support economic development and diversification and to be sufficiently flexible to enable land-use pressures resulting from economic changes to be systematically addressed by the Minister for Planning and Environment. However, the requirement for encouraging growth and diversification must be set against the possible impact on the environment and Island community. Crucially, a balance must be struck between Jersey's desire for continued economic development on the one hand and its desire to limit population on the other.

5.15 The 2002 Island Plan sought to provide sufficient land for commercial and industrial uses and to contain retail and office uses within central St Helier. It made provision for development appropriate for local needs and the re-use of redundant buildings. The policies of the new Island Plan generally reflect this approach.

5.16 There are five main sectors of the economy to be addressed in terms of land-use policies: offices; light industry and warehousing; retailing and the evening economy; rural economy; and tourism.

Indicators

5.17 It is difficult to predict with any certainty what will happen to the economy over the life of the new Island Plan. It will therefore be critical to carefully monitor the policies related to the economy with advice from the Economic Development Department as to what market signals are telling us about the demand for land from different uses and how productivity growth can be better facilitated across the economy.

5.18 Both the Environment and Economic Development Departments will make a regular assessment of the land-uses that Jersey should prioritise and use a number of key indicators to assist with this assessment to include;

Indicators E 1

Economic indicators

1. Freehold land values, rental values & yields
2. Average earnings by sector
3. Unemployment rate
4. Employment by sector
5. Number of rural diversification schemes
6. Demand across all sectors
7. Vacancy rates
8. Amount of employment land lost to other forms of development
9. Amount of land developed for employment/land supply by type

E: Policy

Protection of employment land

5.19 This policy seeks to support the States' published policies relating to economic regeneration by encouraging the recycling of existing employment sites for use by new employment activities. There is particular pressure for residential development on employment land, whilst at the same time there is a shortage of sites available for new business development. The loss of any site can be significant but especially for some of the smaller companies, since 77% of the 5,700 businesses in Jersey employ 5 or fewer people⁽¹⁾.

5.20 There is a benefit to the Island in seeking to maximise the economic contribution of those employment sites which cumulatively provide significant levels of employment. The development of a wide range of business activities on these sites, taking account of their character and potential, including uses such as warehousing, storage and light industry, can provide employment without compromising the quality of the surrounding environment.

5.21 In some cases the existence of an employment use within a residential area can cause deterioration of the local residential environment, and exceptions to the objective of retaining existing employment uses will be considered. Where an existing employment use within a predominantly residential area is causing detriment to the amenity of that area for reasons of traffic generation, noise, vibration, smell, fumes, smoke, soot, ash, dust or grit, the Minister will seek to encourage the improvement, modernisation, diminution, relocation or cessation of that operation in order to overcome the nuisance caused to residential neighbours (Policy EIW 3 'Relocation of bad neighbour uses'). The Department for Health and Social Services has powers to secure improved environmental performance from businesses. However, even where the Minister may support the cessation of a particular business operation for environmental reasons, there may be many alternative employment uses which are capable of operating on that land, either in the existing buildings or in new buildings on the site, without causing detriment to the amenity of residential neighbours. The Minister wishes to safeguard such sites for modern, clean, high technology businesses.

5.22 Proposals to redevelop or convert employment sites for housing will normally be unacceptable because they are likely to raise the price of such sites beyond the means of businesses and also because the Plan makes adequate provision of land for residential development elsewhere (Proposal 7 'Provision of Homes' proposal).

5.23 All proposals to re-develop or convert employment sites will need to demonstrate that they are no longer viable for the existing use before they are considered for alternative uses by the Minister for Planning and Environment.

1 (Jersey in Figures, 2008)

Supplementary planning guidance will be written to provide guidance on what is required to demonstrate; that a site is no longer viable and; that it has been subject to full and proper marketing of the site.

5.24 There will be careful monitoring of this policy to ensure that it contributes positively to economic growth and that the employment implications of developments have been properly taken into account in the planning process. The Minister will continue to review it as appropriate to ensure that it meets these objectives.

Policy E 1

Protection of employment land

There will be a presumption against development which results in the loss of land for employment use as supported by the Strategic Policy SP 5 'Economic growth and diversification', unless;

1. it is demonstrated that the site is inappropriate for any employment use to continue, having regard to market demand. Applications will need to be accompanied by documentary evidence that the size, configuration, access arrangements or other characteristics of the site make it unsuitable and financially unviable for any employment use and confirmation by full and proper marketing of the site on terms that reflect the lawful use and condition of the premises, or;
2. the existing development is predominantly office or tourist accommodation, or;
3. the overall benefit to the community of the proposal outweighs any adverse effect on employment opportunities and the range of available employment land and premises; or,
4. the existing use is generating environmental problems such as noise, pollution, or unacceptable levels of traffic and any alternative employment use would continue to generate similar environmental problems.

Offices

EO: Objectives

5.25 The Department of the Environment seeks to assist the Economic Development Department in retaining the position of Jersey as an international centre for finance and investments, as well as enabling other business activities to develop and thrive. Office uses are recognised as essential to the vitality and viability of the town and, indeed, the Island. The main aims of the new Island Plan are to:

Objective EO 1

Office policy objectives

1. Ensure that sufficient land and opportunities are available to meet the need for additional office floor space;
2. Generally ensure that major office developments do not spread outside the town centre;
3. Facilitate the re-use of buildings and vacant floors of buildings where appropriate; and
4. Allow the provision of small-scale offices within urban and key rural settlements, where they can provide local employment.

5.26 Growth in the financial services sector, together with a greater dependence on information technology and corporate aspirations for first-class office environments have given rise to a demand for larger, modern and more flexible offices. Quality offices are more likely to attract staff, an important consideration when staff are at a premium. Demand is also strong in the secondary office sector from smaller companies looking to expand, or from established companies looking to consolidate, improve and rationalise their space.

EO: Current position

Provision of office accommodation

5.27 Ensuring there will be sufficient space to meet the needs of a worldclass offshore financial services industry is a key aim of the plan. The Waterfront development will release modern premises for financial and related services. The Esplanade Quarter development is anticipated to deliver a significant increase in modern office development of which a large proportion is expected to come from relocation, with the rest arising from growth/new entrants into the Jersey financial sector.

5.28 The Island's population includes some 12,000 professionally trained staff working in the finance and support industries and Jersey is established as an international finance centre for both institutional and private clients. There are now nearly 50 banks located in Jersey and they include nearly half of the top 25 banks in the world and the finance industry represents 53% of the Island's GVA (2008 Jersey in Figures).

5.29 The St Helier office market is estimated to contain around 2,805,000 sq.ft of office stock measured on a net internal basis. Of this, some 165,000 sq.ft (approximately 5.8% of the total stock) is currently vacant and available for immediate occupation. The market is fragmented and spread in pockets throughout St Helier, albeit the core is now regarded as being around the Esplanade.

5.30 In addition, there are currently three significant sites with planning permission in the Esplanade area that could yield some 185,000 sq.ft of prime office accommodation. If no accommodation is lost to alternative uses and the schemes with planning consent and the Esplanade Quarter come to fruition, the total office stock will be approximately 3,610,000 sq.ft.

5.31 Over the past three years, take-up of new office accommodation in St Helier has run at circa 200,000 to 225,000 sq.ft per annum. It is clear that the current "credit squeeze" and global economic situation has caused many of the larger institutions to review their operational property requirements. The vitality of the local office market is intrinsically linked to the fortunes of the local finance industry and the global economic slowdown has undoubtedly caused concerns in this area. Much of the demand for new office accommodation was being driven by the Island's larger banks and trust companies. The focus for many of these organisations is currently on cost saving and redundancies (particularly for the banks that now have large UK government shareholdings) and many possible requirements for new premises are currently on hold.

5.32 Much of the secondary stock within St Helier, particularly accommodation located in converted buildings, no longer provides the quality and functionality that the Island's principal finance and legal firms require. A number of companies are seeking to amalgamate their operations, which have traditionally been based in a series of buildings around the centre, in order to increase the size of floorplate and create more efficient working practices through open-plan offices.

5.33 It is likely that a proportion of the secondary and tertiary office accommodation will become functionally obsolete and alternative uses, such as residential, may be appropriate.

5.34 A market will remain for the better quality accommodation as there will undoubtedly be a raft of businesses who do not wish to pay the rentals for new accommodation in the prime areas. A two-tier market is likely to evolve with secondary areas playing a supporting role to the new premises in or close to the

Esplanade Quarter. The focus of the secondary market is likely to be in areas away from the Esplanade where there is already a concentration of good quality office stock such as New Street, Bath Street, Bond Street, Hill Street and Grenville Street.

Impact of Esplanade Quarter

5.35 It is inevitable that the level of office development in the Esplanade area and the planned Esplanade Quarter, which could represent up to 24% of the total office stock, will have an impact on the local office market. As stated above, it is clear that most now regard the core of the local office market as being in the Esplanade area and the majority of requirements from larger institutions are likely to be met in or around this area.

5.36 Over the life span of the Island Plan much office accommodation will become obsolete in location and functionality. It is estimated that, of the current office stock, over the first five years of the Island Plan, some 100,000 sq.ft of office accommodation, representing approximately 4% of the current total stock will become obsolete. It is estimated that in the second half of the life span of the new Island Plan (years five to 10), some 250,000 sq.ft of office accommodation, representing approximately 10% of the total current stock, will become obsolete.

5.37 There is, therefore, no need to provide newly zoned land for offices outside of the Esplanade Quarter area. However, the Plan must allow choice and flexibility in the office market. It is anticipated that this will be mainly met through opportunities for redevelopment within the town centre and in the Regeneration Areas, as identified on the Proposals Map.

5.38 Given Jersey's small and highly specialised economy it is unlikely that predictions for more than 6-12 years will remain valid. Therefore, market indicators will be used to monitor and provide information on the balance of supply and demand and develop policy options to deal with any imbalances that arise.

EO: Policies

New office development

5.39 Office developments continue to be located in St Helier - there is little provision elsewhere in the Island. The Island Plan seeks to contain office uses within the town centre, as defined on the Proposals Map, and to avoid the spread of uses into residential areas. Although new offices have tended to be built to customer requirements, rather than speculatively, if sustainable development is to be achieved, re-use of existing buildings should be considered where possible and appropriate.

5.40 While the town centre of St Helier is regarded as the most appropriate location for offices, it is recognised that a tightly drawn office development area would limit opportunities and lead to a sterile environment in the town centre,

particularly at night. Office uses may be considered appropriate within certain of the areas of St Helier that currently comprise a mix of uses . The masterplans proposed for Regeneration Zones will determine the appropriate level of office development in other areas.

Policy EO 1

New office development

The development of new offices, and extensions to existing office accommodation, will be permitted within the St Helier Town Centre, as defined on the [Proposals Map](#), and Esplanade Quarter, provided that the proposal accords with Policy GD1 General Development Considerations.

Some new office development may be permitted in the following areas:

- Pier Road/Commercial Buildings;
- North of Town Masterplan area; and
- Gloucester Street.

The appropriate level of new office development in these areas will be determined through the outcome of the North of Town Masterplan and other 'Regeneration Zones' masterplans.

Outside St. Helier Town Centre, the Waterfront and the defined St. Helier regeneration zones, new office developments will not be permitted except where they accord with Policies EO2 Policy EO 2 'Conversion of upper floors of existing commercial buildings for office accommodation' and EO3 Policy EO 3 'Other small scale office development'.

Conversion of upper floors of existing commercial buildings for office accommodation

5.41 There are requirements for secondary office accommodation that can readily be met by offices on the upper floors of commercial premises, rather than in purpose-built accommodation. This makes good use of existing buildings. Such use is appropriate within the boundary of the Built-up Area provided that the ground floor is already in commercial use (including retail). Any such development should not lead to the loss of residential units or have a detrimental impact on the environment or neighbouring uses.

Policy EO 2

Conversion of upper floors of existing commercial buildings for office accommodation

The conversion of upper floors of existing commercial buildings to office accommodation will normally be permitted within the Built-up Area boundary, provided the proposal accords with Policy GD 1 'General development considerations'.

Proposals which do not satisfy the criteria in that policy will not be permitted.

Other small scale office developments

5.42 While major office development has taken place predominately in St Helier, there is likely to be a requirement in the future for small scale office developments (below 250 sq.m) within the town of St Helier, and the urban and key rural settlements. Such development can reduce the overall need for travel and support the life and viability of the urban and rural settlements. However, such developments will require careful consideration as they can lead to traffic and car parking problems, have an impact on the amenity and character of the area and can cause disturbance to neighbouring uses.

5.43 Within the small rural settlements, small built-up areas and outside the Built-up Area boundary, small-scale office developments may only take place where they would be an appropriate use of existing buildings and subject to all other planning policies and criteria for developments in the countryside.

Policy EO 3

Other small scale office development

Small-scale office development will be permitted within the town of St Helier, and the urban and key rural settlements where the proposal accords with Policy GD 1 'General development considerations'.

Outside the town of St Helier and the urban and key rural settlements, office use will normally only be allowed where it would be a conversion of an existing non-residential building .

Businesses run from home

5.44 With the growth of tele-working there is likely to be an increase in the number of people operating businesses from homes. This can help to reduce the overall need for travel. Running a business from home does not require planning consent, provided that it is an ancillary use of the home, not its primary function. [Planning Advice Note 1: Businesses Run from Home](#) gives detailed information on these issues.

5.45 The Minister for Planning and Environment is anxious to avoid intrusive business development in residential areas. This can give rise to problems such as over-demand for car parking facilities, conversion of garden space to parking, more traffic on quiet roads and general disturbance. This policy applies to homes within and outside the built-up area boundary. However, outside the Built-up Areas, the impact of the development on the character and amenity of the area, through visual intrusion on the landscape, will be a particular consideration.

Policy EO 4

Businesses run from home

Where permission is required for the operation of a business from a home, proposals will be permitted provided that they accord with Policy GD 1 'General development considerations'.

Proposals which do not satisfy the criteria in that policy will not be permitted.

Retail

ER: Current position

5.46 The wholesale and retail sector is one of the largest economic sectors in Jersey after financial services. Greater efficiency in retailing and improved productivity will mean that consumer demand in the Island can be met with less use of valuable land resources. This will allow resources to be focused on higher-value added activity which will support economic growth and create better job opportunities locally. In addition, improved productivity will help contain inflation which will be of further benefit to all Islanders and businesses.

5.47 The retail policies in this chapter aim to enhance the vitality and viability of the shopping centres and maintain their attractiveness. The approach is to ensure that any out-of-centre retail development does not have a harmful impact on

existing shopping centres. In the prime frontages of the town centre, retail uses will be retained, although complementary uses such as banks and cafes will also be allowed in order to attract people to the Town Centre.

5.48 The policies aim to make the centres more attractive by promoting environmental improvements and additional facilities for shoppers where they are part of major retail proposals. The objective is to make it easier for people to shop in the town centre, to offset any possible harmful impact that development may have, to support the regeneration of the town, to boost the amount of retailing in the two main centres and to encourage new residential uses in St Helier, and to encourage more people to live close to, and shop, in the centre.

5.49 The retail sector of the economy is important for local residents and visitors alike. It interacts closely with the wider economy and competition can bring benefits for consumers in terms of price, choice and quality. In addition, efficiency improvements in the sector can bring wider benefits for Islanders in terms of economic growth and low inflation. Both the 1987 and 2002 Island Plans sought to uphold and support the role of St Helier as the primary focus for shopping in Jersey, whilst recognising the role of other local centres, and that policy has for the most part been successful.

5.50 Outside town, there are a number of other centres where there is a range of shops. The largest is Red Houses, but Gorey, St Peter's Village, St Aubin, St Ouen's Village and St John's Village also have a significant local rôle.

5.51 The move to out-of-town supermarkets, as experienced in the UK and continental Europe, has been largely resisted, although there has been significant expansion of some peripheral stores. New retail warehouse uses have been restricted to the Built-up Area in accordance with the Island Plan. There has been growth in out-of-town shopping at garden centres such as Ransoms and St Peter's Garden Centre and there has also been a trend towards the expansion of retailing from garage forecourts and the expansion of farm shops.

ER: Objectives

5.52 Jersey has a vibrant evening economy, with restaurants, bars, cafés and nightclubs concentrated in the commercial centre of St Helier, as well as in St Aubin and Gorey. These businesses contribute to the quality of Island life and the attractiveness of the Island for tourists and are regarded as uses important to the local economy. However, they are often located in close proximity to residential accommodation and it is, therefore, important that potential problems such as noise are taken into account and, where possible, mitigated.

5.53 The aims of the Plan, in terms of retailing and the evening economy, are to:

Objective ER 1

Retail policy objectives

1. Protect and enhance the vitality and viability of the core retail centre of St Helier and the centres of the other urban and rural settlements;
2. Prevent a dispersal of new retailing outside the main centres;
3. Retain and enhance the provision of local shopping areas and convenience stores to serve local needs;
4. Concentrate new developments of retail and evening uses in locations that are accessible by pedestrians, cyclists or public transport;
5. Promote mixed use areas; and
6. Maintain an adequate provision of shopping facilities throughout the Island.

ER: Policies

Town centre retail development

5.54 Over many years, and for different reasons, the physical extent of the town's retail centre has contracted, reflecting changes in the pattern of shopping. The character of areas such as The Parade, Bath Street (beyond Minden Place), La Motte Street and Colomberie has changed and they have, for the most part, become secondary shopping areas. In some areas, such as Cheapside, David Place, New Street (north of Burrard Street) and the eastern end of Colomberie, they have become primarily local shopping areas, serving the residential areas surrounding them.

5.55 Thus, there has been a long-term shift in retail activity away from the northern and outlying parts of the Town Centre. This shift in the centre of gravity is further emphasised by the prospect of further retailing on the Waterfront with a specialist retail focus, including the developments at Liberty Wharf, the Esplanade Quarter and Castle Quays. Currently, however, they are poorly linked to the town centre.

5.56 The strategy is to redefine the retail centre. Within its boundary, primary retail frontages are identified, where uses will be restricted to retail and a limited number of catering outlets. Secondary retail frontages are also identified, where greater flexibility of use will be allowed with retail, catering, banking, and professional services permitted, providing they provide an active frontage and a service to members of the public.

5.57 Such a strategy depends for its successful outcome on providing for the growth needs of the retail sector, arising from population and economic growth. The latest retail capacity study, carried out by DTZ⁽²⁾, found that there was sufficient retail capacity in the Island to meet current Island needs. However, should those needs increase, it will be necessary to enable an increase in the amount of the shopping floorspace.

5.58 New sites for retail development within and on the edge of the primary retail area are limited. Although there are areas potentially available at Hue Street and Dumaresq Street, and at Bath Street, they do not represent logical extensions of the shopping centre as they extend the retail floorspace into peripheral areas away from the primary shopping frontages. There are also conservation concerns and a desire to see a return of the lost historic grain in these areas. The preferred area for retail expansion in the comparison goods sector is to the south of Broad Street where there is a large block of potentially developable land between Broad Street, Commercial Street and the Esplanade. The expansion of the primary retail area into this area, with a focus on increased comparison goods retailing, provides the opportunity to better link King Street to Liberty Wharf and the Waterfront by the creation of new pedestrian retail streets.



Map 5.1 Retail Expansion Area

2 [Jersey Retail Study \(2008\) DTZ](#)

5.59 It is not expected that the whole of the designated 'Retail Expansion Area' would be redeveloped for new comparison goods retailing, because of the many existing buildings and uses on the site which should be retained. However, the whole area is so designated in order to give developers the opportunity to propose innovative solutions, which respond to the grain of the area and provide an attractive and commercially viable retail route to Liberty Wharf and the proposed retail facilities on the Waterfront

5.60 If there is a need for additional convenience floorspace (i.e. food and consumable goods), then a location in or near the primary retail area provides some advantages. It would enable 'linked trips' to be made - with comparison shopping or shopping before or after work. In addition, the heavy vehicles servicing such uses would suggest a location accessed off the ring road but not at one of its most congested points. This may preclude such uses at the northern end of Bath Street, or at Dumaresq Street where vehicle access is constrained by narrow streets.

Policy ER 1

Retail expansion in the Town Centre

Land between Broad Street and Commercial Street, as identified on the Proposals Map, is designated for new comparison goods retailing should the need for it emerge during the Plan Period. Development which creates large retail units fronting onto Broad Street, together with a new retail route between Broad Street and the Esplanade will be supported, subject to criteria in Policy ER2 Policy ER 2 'Protection and promotion of St Helier for shopping'.

Protection and promotion of St Helier for shopping

5.61 St Helier has a strong commercial core with both multiple and independent retailers operating. Maintaining the vitality and viability of the centre of town for retailing is important to the economy, as well as to the built environment and cultural life of the Island. In particular, it accords with the vision for St Helier set out in the Built Environment section, which seeks to protect and promote a centre of great vitality by day and night.

5.62 Protecting the character of the centre of St Helier is a balancing act. The presence of too many non-retail uses can threaten the attractiveness of the retail core. It is also important that new retail developments, including the redevelopment of existing units and sites, do not detract from the character and amenity of the town core and, instead, contribute positively to a high quality environment.

5.63 Alongside the protection of the retail centre, environmental enhancement, improvements to increase pedestrian safety, and facilities for shoppers will be supported by in order to improve and promote the centre for shopping. Such measures are addressed within the Built Environment and Travel and Transport sections.

Policy ER 2

Protection and promotion of St Helier for shopping

The role of St Helier as the main retailing centre of the Island will be protected and promoted where this is compatible with the goal of enhancing retail efficiency. Environmental enhancement, improvements to pedestrian safety and facilities for shoppers, including provision of off-street parking for shoppers, and permeable access for cyclists, where possible, within the centre will be supported.

Proposals for new or extensions to existing retail development will be permitted within the Map 5.2 'Core Retail Area', provided that the development accords with Policy GD1 General Development Considerations. Proposals which do not satisfy these criteria will not be permitted.

Proposals for the refurbishment or extension of pre-existing retail premises outside the Core Retail Area will be permitted provided that the development accords with other retail policies of the Plan.

Proposals for new retail development outside St Helier core retail centre will not be permitted except where they accord with; Policy ER 3 'Protection and promotion of local shopping centres', Policy ER 4 'Development of local shops' and Policy ER 7 'Large-scale food retailing'.

Changes of use involving a loss of ground floor retail floor space within the core retail centre will not be permitted.



Map 5.2 Core Retail Area

Protection and promotion of Local Shopping Centres

5.64 The retention of essential local shops within easy walking distance of most homes is important in order to reduce the need to travel, and especially important to the less-mobile members of the community, such as the elderly, the disabled, and those without access to a car. Most of the urban and rural settlements have a good range of local shopping facilities. Some are significant local shopping centres, such as Red Houses, St Aubin, St Peter and St John. Others are parades of shops in the urban areas, such as Five Oaks, Gorey Village and Miladi Farm. There are many other small shopping centres, comprising a number of essential local shops and services. Where possible, the Environment Department will use its powers to protect such essential facilities and to promote these centres.

5.65 Within these centres, a change of use from retailing to non-retail uses can have a significant impact on the shopping facilities of local communities, particularly if it leads to the loss of essential local shops such as general convenience stores. Such changes of use will not generally be favoured to replace food outlets, but in other cases the provision of service outlets, such as dry-cleaners and cafés for example, can enhance the facilities serving the local community.

Policy ER 3

Protection and promotion of local shopping centres

The Minister for Planning and Environment will seek to protect local shopping centres at:

- Les Quennevais/ Red Houses;
- Gorey Village;
- St Aubin;
- St Ouen's Village;
- St John's Village;
- St Peter's Village
- Five Oaks and Bagatelle Parade; and
- Miladi Farm Parade.

Within local shopping centres, new retail developments will be permitted provided that the proposal accords with Policy GD 1 'General development considerations'.

Changes of use within local shopping centres from retail to non-retail use will only be permitted where the proposed non-retail use will meet an identified local need and contribute to the vitality and viability of the centre.

Development of local shops

5.66 Reasonable access to local shops is essential for the day-to-day needs of all members of the community and preference will be given to developments proposed in locations within the Built-up Area where provision is currently inadequate. In areas where substantial new housing development is proposed, the Environment Department may seek appropriate provision of shop units as part of the scheme, depending on the existing availability of local facilities.

5.67 In assessing any proposal for a new unit or a change of use to retail, the Minister for Planning and Environment will take into account the appearance, method of operation and likely customer attraction of the proposed use, as well as any impacts on existing shopping provision and the amenity and character of the surrounding area.

Policy ER 4

Development of local shops

Proposals for new small local shops of 100m² ⁽³⁾ will be permitted within the boundary of the Built-up Area provided they will not unreasonably affect the character and amenity of the area and where the proposal accords with Policy GD 1 'General development considerations'.

Proposals which do not satisfy these criteria will not be permitted.

Development of evening economy uses

5.68 Within the town centre of St Helier and local shopping centres, as well as Tourist Destination Areas such as Gorey and St Aubin, there is a range of non-retail activities such as arts and cultural venues, restaurants, cafés, food take-aways, public houses, bars and night-clubs. These areas, and their evening uses, are particularly important to the Island's tourism function as well as serving the local population. St Helier town centre and the local shopping centres, as well as Tourist Destination Areas are appropriate locations for the development of new evening economy uses. With regard to proposals for new night-clubs and other uses with the potential to cause noise or other disturbance, the Minister will pay particular attention to the impact on nearby homes and other residential accommodation, including tourist accommodation, and the character and amenity of the area.

Policy ER 5

Development of evening economy uses

Proposals for arts and cultural venues, restaurants, cafés, public houses and other non-retail uses will be permitted within the town centre of St Helier, local shopping centres and Tourist Destination Areas, provided that the development accords with Policy GD 1 'General development considerations'.

In the remaining parts of the Island, applications to establish such uses will be considered on their merits having regard to their impact on neighbouring uses.

3 defined as having a gross floor area of 100 sqm or less

Take-away food outlets

5.69 Food take-aways include both hot and cold food outlets and provide a necessary service for Island residents and visitors alike. Take-aways are best located in St Helier town centre, in the centres of urban and key rural settlements, or at visitor destinations. It is recognised that take-away outlets have potential impacts on neighbouring uses in terms of a high turnover of customers, unsociable hours, cooking odours and parking problems.

Policy ER 6

Take-away food outlets

New take-away food outlets will only be permitted where the proposal is within St Helier town centre, a local shopping centre or a Tourist Destination Area, and it accords with Policy GD 1 'General development considerations', and having regard to their impact on neighbouring uses, especially residential accommodation.

In the remaining parts of the Island, applications to establish such uses will be considered on their merits having regard to their impact on neighbouring uses.

Large scale food retailing

5.70 The purpose of the policy is to ensure that new large-scale food retail development (over 500m²) supports and enhances the existing hierarchy and distribution of food retail provision across the Island. In particular, St Helier town centre provides a range of services and facilities as well as shops: this enables different needs to be met in a single trip and offers greater accessibility by different means of transport. Shopping activity often underpins the wider service role of existing centres and helps provide a focal point for the local community. For this reason a sequential approach to new food retail development whereby sites in town are preferred, followed by edge of centre sites and, only if there are no suitable town centre or edge-of-centre sites available, other sites which are well served by a choice of means of transport.

5.71 Proposed shopping developments also need to conform to the principles of sustainability and it is important to ensure that they do not lead to serious transport and accessibility problems. All proposals for new retail developments outside existing centres, which do not conform to the policy, will have to demonstrate both that there is a need for the development and that a sequential approach has been applied in selecting the location for development.

5.72 The retail capacity modelling carried out by DTZ⁽⁴⁾, based on the results of a Household Interview Survey of shopping patterns in Jersey, shows that the existing foodstores and other convenience goods shops in St Helier Town Centre are currently trading at somewhat above realistic 'benchmark' levels, based on UK food retailers' company averages. This means that if forecast growth of population and per capita expenditure occurs, there will be sufficient expenditure to support a modest amount of additional food retail floorspace in or on the edge of the town centre.

5.73 Conversely, the modelling shows that outside of St. Helier the main foodstores elsewhere on the island, as a group, are trading somewhat below the same 'benchmark' levels. This means that as a group they are modestly under-trading, and therefore any additional capacity for food shopping floorspace outside of St Helier is unlikely to be approved

5.74 Taking Jersey as a whole, there is no forecast quantitative capacity for additional foodstore floorspace up to 2015. Thereafter, capacity will grow modestly to 2025, if forecast trends occur.

Prices and competition

5.75 The Jersey Retail Study (2008) was concerned with retail capacity and therefore does not address the issues around the benefits that competition can bring for consumers in terms of price, choice and quality and for the wider economy in terms of increased productivity, growth and lower inflation.

5.76 Work undertaken by the Economic Development Department has indicated that competition can be limited when markets are concentrated i.e. there are a small number of players in the market. Evidence from around the world suggests that competition in convenience retail is limited when there are less than three players in the market. In Jersey there have been, in effect, only two large players in the convenience market which means that competition has been limited, a position that could work against the Island's economic objectives. The recent arrival and opening of stores (in 2011) by a new operator in the form of Waitrose, may alter the nature of the local food retail market by providing more competition for the existing and established operators.

5.77 A study by the Jersey Competition Regulatory Authority (Economic Impact of New Entry in the Retail Sector by a Large Supermarket Competitor) concluded that the entry of a large supermarket operator into the food retail sector would be economically beneficial in terms of increasing consumer welfare, the productive efficiency of existing retailers and the Jersey economy overall.

4 [Jersey Retail Study \(2008\)](#)

5.78 Consistent with the JCRA's role and expertise, it is acknowledged that this report is limited to determining the economic impact of a new entrant into the food retail sector. Other considerations, such as planning, population growth, and environmental impact, also are undoubtedly important, but were beyond the scope of JCRA's inquiry.

5.79 While issues of economics and competition are important, the policy aims to ensure that a rigorous sequential approach to the location of new food retail developments is followed, whilst at the same time not preventing the entry of a new supermarket operator or acting as an unnecessary or unintended barrier to competition.

5.80 If circumstances were to change over the life of the Plan and the need for an additional large supermarket arose, then it is vital that any new food store is located where it is accessible by all modes of travel and in particular, where it can be easily reached by those without access to private transport and where it would not have an unreasonable effect on the viability of other retail centres. Accordingly, St Helier town centre, as defined on the Proposals Map, is the most appropriate location for any new major food retailing development (generally of more than 500 m²/ 5,000 square feet of gross retail floor space). There will, therefore, be a presumption against any new major food retailing developments outside St Helier town centre. In the event that any such proposals are submitted, the Planning and Environment Minister would need to be convinced that there are no suitable alternative sites available in more accessible locations. Developers will be required to demonstrate a sequential approach to site selection commencing with St Helier town centre and then edge-of-centre and then other locations within the town of St Helier (in accordance with Policy SP 3 'Sequential approach to development'). In any case, sites must be accessible by a choice of means of transport.

5.81 Developers will need to demonstrate that the proposal meets the criteria of this policy and any application will require a retail impact assessment to be submitted with it.

5.82 Modern expectations of shoppers will mean that supermarket operators will want to invest to improve the quality of their existing stores. In general, the extension, refurbishment or redevelopment of existing stores is preferred over new stores in new locations, given that most supermarkets are already accessible by alternative modes to the car and are adjacent to the primary road network.

Policy ER 7

Large-scale food retailing

- Proposals for the provision of new food retailing floor space over 500sqm/5,000 sqft (gross) will only be permitted where the proposed development:

1. is located in St Helier Town Centre;
2. itself, or cumulatively with other or proposed retail developments, will not cause detriment to the vitality or viability of St. Helier Town Centre;
3. is genuinely accessible by a choice of means of transport including pedestrians, cyclists, public transport users including those with mobility impairments;
4. provides adequate space and facilities for servicing and deliveries;
5. provides facilities for the recycling of waste packaging generated by the proposal and complies with relevant waste policies.
6. accords with General Development Considerations

The redevelopment or extension of existing food retailing stores to over 500 sqm floorspace will be subject to criteria (2) to (6) above.

In exceptional circumstances, major food retail development proposals for floorspace over 500 sqm/5,000 sqft (gross) may be permitted outside St Helier Town Centre where:

1. a demonstrable need exists for the scale and type of development proposed; and
2. criteria 2 to 6 above are satisfied; and
3. no sequentially preferable site is available, suitable and viable (Policy SP 3 'Sequential approach to development') - starting with town centre, then edge of town centre sites, then out-of-centre locations; and
4. it does not materially prejudice the provision of other land uses, particularly the supply of land for employment, housing, community use and open space.

Large scale non-food retailing

5.83 Outside the town centre of St Helier, large-scale retail developments selling durable goods are not generally acceptable. Out-of-town centre retail developments tend to be self-contained facilities and may draw shoppers away from the existing centres. They are generally more reliant on travel by car as they are often inaccessible to public transport, pedestrians and cyclists.

5.84 The trend towards large out-of-town or out-of-centre retail warehouses has largely been resisted in Jersey, with the notable exception of the JEC site in Queen's Road. Retail warehouses may complement town centre uses by accommodating bulky goods sales, but such warehousing should not be encouraged as it is difficult to control the type of goods for sale and, over time, a shift of larger town centre retailers to these out-of-town stores is likely. Moreover, bulky goods

are successfully sold from town centre locations without requiring the amount of floorspace necessary in warehouse stores. Allowing out-of-town retail warehouses could have a significant impact on the viability of the town centre, as well as being reliant on car travel.

Policy ER 8

Large-scale non-food retailing

Proposals for large-scale non-food retailing (including retail warehouses) will only be permitted where the proposed development:

1. is located in St Helier Town Centre;
2. itself, or cumulatively with other or proposed retail developments, will not cause detriment to the vitality or viability of St. Helier Town Centre;
3. is genuinely accessible by a choice of means of transport including pedestrians, cyclists, public transport users including those with mobility impairments;
4. provides adequate space and facilities for servicing and deliveries;
5. provides facilities for the recycling of waste packaging generated by the proposal and complies with relevant waste policies.
6. accords with General Development Considerations

In the case of applications for large-scale non-food retailing (including retail warehousing) outside the St Helier Town Centre, evidence of retail impact will be required to show that the proposal would not undermine the vitality and viability of the town centre.

Any retail impact assessment should address the following issues:

1. the quantitative and qualitative need for the development, including increases in sales areas;
2. the sequential approach, as outlined by the Policy SP 3 'Sequential approach to development'.

Retailing within industrial sites

5.85 The existing industrial sites, defined at Policy EIW 1 'Protection of existing industrial sites', such as Rue des Pres, already include an element of trade retailing and this serves an important commercial function. Only retailing that is, however, ancillary to the industrial, distribution or warehouse use is considered to be acceptable within the designated industrial sites (existing and proposed). Allowing units to be primarily for retail use could lead to the industrial estates becoming

locations for out-of-town retailing, as this may achieve higher rentals. This would detract from their industrial purpose and reduce the stock of premises available to industry.

Policy ER 9

Retailing within industrial sites

Proposals for retail development within existing and proposed industrial sites will only be permitted where the development relates to the sale of items manufactured, packaged or distributed on the premises or the same industrial site, or where the sale of such items is subsidiary to their manufacture, packaging or distribution, and will not lead to an unreasonable loss of industrial floorspace.

Proposals which do not satisfy these criteria will not be permitted

Retail development outside the Built-up Area

5.86 During the life of the 2002 Island Plan, retail development in the countryside has been largely resisted and the Planning and Environment Minister will continue to resist proposals for retail uses outside the Built-up Area.

5.87 Retail uses in the countryside will only be considered where they are ancillary to other uses. Shops ancillary to other uses, such as garden centres at nurseries or garage forecourt shops, can provide a community facility, local employment and assist the diversification of the agricultural economy. The Planning and Environment Minister will support this type of development provided that it is related and ancillary to the main use and is limited in scale: normally the maximum size should be under 100 sq.m of retail floorspace.

5.88 The impact of such facilities on the existing hierarchy and distribution of shopping facilities in the Island will need to be taken into account, as will the impact on the countryside.

Policy ER 10

Retail development outside the Built-up Area

There is a presumption against the establishment of new retail uses outside the Built-up Area, in accordance with Policy SP 3 'Sequential approach to development'.

In exceptional circumstances, the Planning and Environment Minister may permit the sale of goods which are related and ancillary to the main activity on the site and where the proposal makes use of existing buildings, and will have no unreasonable effect on the vitality or viability of St Helier Town Centre, the central markets or a local shopping centre.

There will be a presumption against extensions to existing retail buildings outside of the Built-up Area.

Farm shops

5.89 Retail outlets should normally be located within the defined shopping centres but there may be instances where it is appropriate and beneficial to allow retailing where it is ancillary to an existing related economic activity outside the Built-up Area. Farm shops can provide a valuable service for both visitors and local residents in rural areas, providing fresh local produce, jobs and other services, which play a vital role in the diversification of the rural economy.

5.90 The sale of fresh local produce should be the major justification for the shop's existence and should be the predominant basis of retail sales, grounded on the fresh produce of the agricultural operation on which the farm shop is based. This is to ensure that the enterprise does not directly compete and undermine the viability of local shopping centres.

5.91 The Minister recognises that in order to provide a service throughout the year, farm shops will need to bring in produce that is not produced on the agricultural holding to overcome the problems of seasonality, to provide continuity of employment and to ensure a sufficiently wide selection of produce can be offered. However, the emphasis should remain on fresh local produce and conditions may be imposed in respect of the quantity of non-farm produce and non-local goods to be sold to ensure that it remains a farm shop and where it is felt that the enterprise could impact adversely on the vitality of local shopping centres or the town centre.

5.92 The retail outlet should have regard to its rural location and not detract from the visual amenity of the area. Normally the maximum size of a farm shop should be under 100 sq.m. To lessen its impact, the outlet should normally be developed within existing buildings or within the curtilage of an existing group of buildings.

5.93 Work is to be undertaken to assess the nature and extent of farm shop provision and the nature of retail sales from them in Jersey and the Minister may issue further supplementary planning guidance in response to its findings.

Policy ER 11

Farm shops

Proposals for farm shops and other small-scale ancillary retail outlets will be permitted where the enterprise is ancillary to an existing related economic activity, and where it does not undermine the vitality and viability of existing shopping centres defined in Policy ER 2 'Protection and promotion of St Helier for shopping' and Policy ER 3 'Protection and promotion of local shopping centres' or put at risk a near-by village shop; and where the development is not more than 100sq.m.(gross) in floor area.

The proposal must meet the requirements of Policy GD 1 'General development considerations' and conditions will be imposed in respect of the type and range of goods to be sold.

Light industry and warehousing

EIW: Current position

5.94 The light industrial and warehousing sector includes a diverse range of activities including manufacturing, construction, storage, garages and workshops, warehousing, distribution and transportation businesses. Most industrial activity that takes place in the Island can be described as light industry, storage or distribution.

5.95 The land-use requirements of industry present a particular challenge given the competing pressures on land in the Island. If sufficient land is not provided, the growth and development of the light industrial sectors of the economy will be stifled. Emerging industries may not develop because of a lack of premises. This will also restrict opportunities to relocate businesses from sites where they have an adverse impact on residential areas, or can release land for homes.

5.96 The requirements for industrial land over the Plan period will arise primarily from:

- the relocation of businesses from their current locations, through expansion and improved operations;
- businesses which may be regarded as 'bad' or inappropriate neighbours, many of which occupy sites in areas subject to regeneration and environmental improvement;
- new enterprises
- the emergence of certain industries with particular land-use requirements, such as e-commerce, marine traders and the media.

5.97 Information on future requirements has come from consultation with the main commercial agents about outstanding requirements for sites and floorspace of various sizes and the estimated floorspace associated with businesses seeking to relocate or included within the assessment of urban capacity as bad neighbours or sites with potential for other, principally housing, uses.

5.98 It is the policy of the Economic Development Department to assist diversification of the economy and a strategy group has been formed to deal with 'emerging industries'. These include industries such as crafts, marine and aviation-related businesses, e-commerce, and media/film. The growth and development of these industries may lead to various requirements for floor space in addition to those identified above.

5.99 The site requirements for the different types of users will vary. Purpose-built starter units or redundant agricultural buildings could suit many small enterprises. Larger users are likely to require specific sites developed for particular needs. Most industry will require good road access, particularly for distribution businesses. Marine and aviation related industries mainly require locations close to St Helier Harbour and Jersey Airport respectively. Certain types of employment uses may also be suitable within the town of St Helier, provided that they are compatible with neighbouring uses.

EIW: Objectives

5.100 The new Island Plan seeks to provide opportunities to assist industry to develop and thrive as a valuable sector of the Island's economy. It will ensure that land in industrial use is used efficiently and with minimal impacts on other activities. Specifically, policies aim to:

Objective EIW 1

Light industry and warehouse policy objectives

1. Protect existing industrial estates and sites from development for non-industrial uses;
2. Ensure that sufficient land is available to provide for the relocation of inappropriately located industry;
3. Allow for the expansion of existing industries and the formation of emerging industries;
4. Support the provision of small-scale workshops and industrial premises within key settlements, where they can provide local employment;
5. Ensure that light industrial development is concentrated in locations where the impact on the landscape, agriculture, adjacent land-uses and transport and utilities infrastructure is minimised.

EIW: Policies

Provision of light industrial and warehouse land

Summary of demand findings

5.101 At present it is estimated that the current stock of industrial accommodation is in the region of 1.5 million sq.ft (139,354 sq.m). This is situated on a diverse array of sites throughout the Island with the main locations being La Collette, Elizabeth Harbour, Rue des Pres Trading Estate, St Peter's Technical Park, Rue du Bechet, Springside and Five Oaks. In addition, there are a number of smaller secondary locations such as Thistlegrove, Landes du Marche and the Barrette's site in St John.

5.102 The quality of the existing stock ranges considerably from new purpose-built accommodation with high eaves and good access, to former farm buildings. Much of the existing stock has evolved over the years and is now constrained by planning or geographical restrictions. Many of the sites therefore suffer from very poor circulation and parking provision. Access to many sites is also poor, particularly for larger vehicles where premises are situated in rural locations.

5.103 At the time the Island Plan was published in July 2002 it was noted that there were requirements for some 25,000 sq.m or (270,000 sq.ft) of "industrial floor space". Therefore, since the adoption of the Island Plan, the level of demand remained fairly constant and had not been reduced by a significant proportion up to 2007.

5.104 It was also highlighted in the 2002 Island Plan that to assist with the relocation of businesses from the town centre in order to release land for housing and other more appropriate uses, there may be a requirement for a further 17.4 acres or hectares of industrial land. Based on an approximate ratio of floor space to site area of 1:2 this would equate to a further 379,000 sq.ft (35,210 sq.m) of industrial accommodation.

5.105 In response to a Chamber of Commerce survey in December 2006, 22% of respondents stated that they had been seeking premises for over 1 year and in May 2008 this had increased to 43%. 62% agreed that the provisions of the existing Island Plan, which allocated land at La Collette for further industrial development, which has been used instead for waste management and latterly the new Energy from Waste plant, were restricting access to appropriate facilities to meet their requirements.

5.106 In December 2006 46% had stated that the lack of available facilities was having a negative impact on the development of their business and in 2008 this increased to 79%.

5.107 At present there are unsatisfied requirements for up to 50-75,000 sq.ft of warehousing and light industrial accommodation ⁽⁵⁾, which represents approximately 3-5% of the existing light industrial/warehousing stock. Based on an approximate ratio of floor space to site area of 1:2, the current level of demand equates to approximately 2.3-3.4 acres of land.

5.108 The latest findings from the BNP Paribas report also finds that the nature of the requirements has also changed and believe that there is now less demand for larger premises in excess of 20,000 sq.ft. In terms of current requirements there are only 2 or 3 in excess of 10,000 sq.ft with the majority being for smaller premises in the 2,000 to 5,000 sq.ft range.

5.109 BNP go on to state that they believe that there is a significant "hidden demand" in the market. In other words businesses who are currently occupying sub-standard premises who would consider relocating if suitable alternative premises were available but are not actively searching because of the lack of accommodation on the market. The limitations of the existing stock are well demonstrated in Rue des Pres where access and car parking provision is extremely poor.

5.110 There is anecdotal evidence that demand is particularly strong for premises suitable for "start-up" businesses in the 1,000 to 4,999 sq.ft category and there is strong demand for accommodation for archiving and disaster recovery. The local fulfilment sector is also continuing to generate some demand for suitable accommodation.

5.111 The majority of the current demand is being driven by businesses wishing to expand or obtain improved operational capabilities through the use of more efficient premises. Almost without exception the occupiers seeking accommodation require:

- internal eaves height of 8 metres or more to achieve the best possible cubic capacity.
- premises should be of a clear span portal frame construction with, insulated external cladding and a floor slab capable of supporting a loading of 50 kn/sq.m or 1,000lb/sq.ft
- loading doors of approximately 4.8m x 4m.
- good parking, circulation and access for larger vehicles.

5.112 In summary the total (taking both the re-location and unsatisfied demand) for new light industrial land is of the order of 20 acres. It is, however, important to keep these requirements under review, particularly given the potential for

5 Source: BNP Paribas Real Estate (February 2011)

change to the low value consignment arrangements⁽⁶⁾ that have enabled the fulfilment industry to grow and develop in Jersey. Any change to these arrangements may significantly alter demand for warehouse floorspace.

Summary of supply findings

5.113 The provision of potential additional industrial floorspace to meet this excess demand has been identified at the following locations:

La Collette and surrounding harbour areas

5.114 Potential future provision at La Collette and the surrounding harbour areas is currently being considered as part of detailed masterplanning exercise. La Collette could yield up 43,400 sq.m/467,158 sq.ft of land for mixed business use, light industrial and warehousing. However it is recognised⁽⁷⁾ that Buncefield Restrictions have potentially sterilised much of the La Collette Site and have restricted the use of the premises to their existing use or a very limited range of alternative uses which will limit their useful contribution to the stock of premises in this sector in the future.

5.115 The area has been identified on the proposals map as a Regeneration Zone, and until the masterplanning is complete it is unknown what the realistic potential for industrial development may be and so other sources of supply will need to be relied upon.

Non-operational land at the airport

5.116 Potential future provision on non-operational land surrounding the airport is also currently being considered as part of a detailed masterplanning exercise. This site has been identified as a Regeneration Zone and offers the potential to contribute towards the need for new light industrial, business or warehouse space, subject to traffic impact assessments.

Other States-owned land

5.117 The use of States-owned land, outside of the airport and La Collette, also has the potential to meet some of the demand. Clearly, any such land would need to be appropriate in planning terms and accord with the criteria used to assess

6 A reduction from £18 (reduced to £15 VAT relief threshold in November 2011, at March 2011) applies to all goods imported into the UK from outside the European Union, with the exception of alcohol and tobacco, for which other rules apply. The relief falls under European Community VAT legislation that requires member states to exempt from VAT all eligible goods with a value of less than €10. Member states may increase the threshold to €22 if they so wish and, like the majority of the other member states, the UK has always applied the maximum relief allowable since the introduction of the directive in 1983. This is done to reduce the administrative and operating costs of calculating, collecting and paying small amounts of tax on very large numbers—millions—of low-value goods.

7 BNP Paribas Real Estate (February 2011)

light industrial sites. Those sites with potential to contribute to this need that are presently part of the States property portfolio, or with the potential for disposal, will need to be assessed as they become surplus to requirements and available.

Existing light industrial sites

5.118 Seven existing industrial sites zoned in the 2002 Island Plan are protected from alternative development by Policy EIW 1 'Protection of existing industrial sites'. They are;

- Rue des Pres Trading Estate, St Saviour;
- Jersey Steel, Beaumont, St Lawrence;
- St Peter's Technical Park, St Peter;
- Springside, Trinity;
- L.C. Pallot Properties, Trinity;
- Barrette Commercial Centre, Mont Mado, St John,
- Thistlegrove, St Lawrence.

5.119 A review of these has revealed that most of the sites are operating at near capacity and are unsuitable for any form of expansion.

Development of existing agricultural premises/windfall development opportunities

5.120 Other requirements for industry may be met by using redundant agricultural buildings for light industry and storage. Disused agricultural buildings are particularly important in providing small workshops, although not all redundant agricultural buildings will be suitable: they will have to comply with the policies in the Rural Economy section (Policy ERE 5 'New Agricultural Buildings, Extensions, And Horticultural Structures'). This source is not expected to be significant in meeting the future requirements of light industrial development and also cannot be predicted with accuracy.

5.121 The other potential category is that of private windfall development, which cannot be individually predicted at this stage. This windfall source could include sites within the Built-up Areas, in addition to conversions and small developments in the countryside, where appropriate. Some of these sites may arise though Policy E 1 'Protection of employment land', which will promote and allow for the re-use of existing commercial sites, some of which may move to light industrial use.

5.122 The Minister also considers that his proposed changes to permitted development rights for light industrial / warehouse premises - allowing a five *per cent* increase in floorspace without the need for express consent - may also enable the enhancement and improvement of the supply of warehouse / light industrial

premises⁽⁸⁾. This change could, theoretically, see the creation of an additional 75,000 square feet (7,000 sq.m), which would meet the current estimated demand levels.

Proposal 17

Provision of light industrial and warehouse land

In order to meet the demand requirements for light industrial land, additional land will be considered for potential light industrial development over the Plan period.

It is anticipated that this land could come from the following potential sources, which will, in some cases, need further examination and may require consultation before any development can take place;

- La Collette and surrounding harbour areas
- non-operational land at the airport
- other States-owned land
- existing light industrial sites
- development of existing agricultural premises/windfall development opportunities

The demand for light industrial and warehouse land will be monitored and kept under review over the Plan period.

Protection of existing industrial sites

5.123 The States Strategic Plan 2009-2014 promotes the need to sustain and enhance the Island's economic performance. That Plan recognises that it is important to the Island's economy to encourage and facilitate sustainable economic growth with low levels of inflation coupled with economic diversification and the creation of job opportunities.

5.124 This objective is dependent, in part, on protecting and enhancing existing employment/commercial land and sites. It is considered appropriate to enhance and protect the Island's most sustainable and valued 'industrial' estates through the application of appropriate policies, particularly by a sequential approach towards any redevelopment proposals.

8 Proposed amendment to General Development Order

5.125 It is important that prime industrial sites are protected from changes of use that would lead to a loss of industrial land and restrict the ability of the economy to adapt and develop. There are seven existing prime industrial sites which warrant such protection. Some of them provide opportunities for expansion, partial redevelopment or environmental and access improvements. These may include developing additional floorspace, refurbishing units, providing off-street car parking, improving access, security and infrastructure and landscaping.

5.126 Sites such as Rue des Pres (St Saviour), Springside (Trinity) and Thistlegrove (St Lawrence) were zoned by the States to provide for the Island's industrial needs and are now almost fully occupied. In addition, there are other commercial sites, which began as agricultural businesses and have developed to incorporate a significant proportion of non-agricultural industries. While the overall loss of agricultural buildings to the industry is a concern, the sites are well located and provide significant employment.

Policy EIW 1

Protection of existing industrial sites

Industrial development and redevelopment, including manufacturing, warehousing and distribution uses, will be permitted within the following existing industrial sites, subject to being in accordance with criteria for new industrial development, as set out in Policies Policy EIW 2 'New industrial buildings' and 'Extensions or alterations to existing industrial buildings'. The following sites are designated on the [Proposals Map](#) as industrial sites:

- Rue des Pres Trading Estate, St Saviour;
- Jersey Steel, Beaumont, St Lawrence;
- St Peter's Technical Park, St Peter;
- Springside, Trinity;
- La Collette, St Helier;
- L.C. Pallot Properties, Trinity;
- Barrette Commercial Centre, Mont Mado, St John; and
- Thistlegrove, St Lawrence.

Within the boundary of these sites, the introduction of non-industrial uses will not be permitted, unless related to and ancillary to the industrial use.

Proposals for new industrial buildings

5.127 New buildings or redevelopment of buildings for industrial use must be of a standard of design and layout that promotes a high quality of development, minimises the impact on adjacent uses and the environment and makes best use

of the site. It is anticipated that any new buildings will be located within the new and existing sites or within the Built-up Area boundary. Where sites are within the Built-up Area but not on an industrial estate, the impact on adjacent land-uses and residential amenity will be of particular concern. It is important that in allowing industrial development within the built-up area, future 'bad neighbour' situations are avoided.

Policy EIW 2

New industrial buildings

Proposals for new industrial buildings within designated sites and the boundary of the Built-up Area, will be permitted provided that the development accords with Policy GD 1 'General development considerations'.

Proposals which do not satisfy these criteria will not be permitted.

Relocation of bad neighbour uses

5.128 There are existing industrial users which, for historic reasons, are located within the Built-up Area, many on constrained sites and adjacent to residential properties. Relocating these 'bad neighbours' can bring environmental benefits, release land for other uses, such as housing and open space, and enable the industrial users to expand or occupy more efficient premises.

Policy EIW 3

Relocation of bad neighbour uses

The Minister for Planning and Environment will encourage the relocation of industrial, storage and distribution activities which are considered to be unneighbourly in their present location where it would lead to overall environmental benefits and accords with Policy EIW 2 'New industrial buildings'.

The relocation of industrial, storage and distribution activities will be particularly encouraged where this would release land within the town of St Helier for housing, open space, tourism or other community uses.

Extensions or alterations to existing industrial buildings

5.129 Whilst new sites identified in the Plan will provide opportunities for industries to relocate for expansion or improvement, land already in industrial use will continue to meet the majority of requirements. Enabling existing industries to expand and develop on existing sites rather than relocate makes economic sense because it uses existing land resources and buildings more efficiently. However, where there are potential problems associated with an industrial operation, it is important that any extensions or alterations mitigate, rather than exacerbate, its impact.

5.130 There will be a general presumption against the approval of extensions to existing industrial properties and/or the intensification of uses at industrial sites, outside the Built-up Area and outside designated industrial sites

Policy EIW 4

Extensions or alterations to existing industrial buildings

The extension or alteration of existing industrial buildings will be encouraged, provided that the proposal accords with Policy GD 1 'General development considerations'.

Proposals which do not satisfy this policy will not be permitted.

There will be a presumption against extensions, alterations and/or the intensification of use of existing industrial buildings outside of the Built-up Area and designated industrial sites.

New industrial development in the countryside

5.131 Only in very exceptional circumstances will the construction of new buildings for industrial purposes be allowed outside the Built-up Area. This might include ancillary buildings at quarries or landfill sites or buildings for agricultural processes. In such cases, it will need to be demonstrated that the buildings are essential to the operations at the particular site, and cannot be located within the Built-up Areas or on a designated industrial site.

Policy EIW 5

Industrial development in the countryside

There will be a presumption against development for industrial purposes in the countryside. Proposals will only be permitted for forms of development which must occur in the countryside, where they are;

1. directly related to the winning, processing, treatment and transportation of minerals; waste management including recycling; or the processing of agricultural products;
2. essential for the processing to take place close to the source of raw materials;
3. related to the expected life of the raw material source or landfill site; and
4. in accordance with Policy GD 1 'General development considerations'.

Proposals which do not satisfy these criteria will not be permitted

Rural and marine economy

ERE: Current position

5.132 The appearance of Jersey's countryside is largely the product of human intervention, mainly through farming. Agriculture has been going through changes for several decades due to changing technologies and economic forces. Tourism is targeting a 'greener', more discerning visitor and leisure and recreation are making new demands on rural areas. Furthermore, changing lifestyles place greater pressure on rural settlements and the countryside for housing and employment.

5.133 The Rural Economy Strategy - P.112/2005, approved by the States in July 2005, commits to maintaining and enhancing a strong, successful and environmentally sustainable economy and made recommendations on ways to achieve this. It has recently been updated ⁽⁹⁾ but retains support for these key principles.

5.134 The strategy introduced 'inter alia' the concept of enabling development in support of the Island's agricultural industry, specifically aimed at aiding the recovery of the rural economy.

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5.135 "Enabling development" includes development that can be contrary to established planning policy in the Island Plan, but because it brings public benefits that have been demonstrated to clearly outweigh any harm that would be caused by the development, a case can be made for granting permission. The benefits are paid for by the value added to land as a result of the granting of planning permission for its development.

5.136 The defining characteristic of enabling development is that, whilst it may be contrary to established planning policy, the gain from contravening policy subsidises a public benefit that could not otherwise be achieved. Thus, unlike most planning applications, financial issues are central to determining proposals for enabling development and the Minister will have regard to this when considering such applications.

5.137 The Jersey countryside is one of its most prized assets but the limited supply of land in the Island has resulted in it being subject to considerable pressure for development. To some extent this pressure is related to the pressure for development that cannot be met in the urban areas but it is also to meet the needs and aspirations of those living and working in the countryside. Development includes housing and industry, rural development associated with farm units, the requirements for diversification of the agricultural industry and demand for tourism and leisure activities. All of these, to a greater or lesser extent, can threaten landscape character and biodiversity and require careful control, while meeting the needs of the Island's residents.

ERE: Objectives

5.138 The policy objectives for this section of the plan are the same as the Countryside Renewal Scheme. The Scheme provides funding to farmers, landowners and managers for projects that provide environmental benefit to the people and wildlife of Jersey

Objective ERE 1

Rural economy objectives

The aims of the Countryside Renewal Scheme are:

1. To improve the care of the Island's countryside, enhancing biodiversity, protecting wildlife and the landscape;
2. To bring additional environmental benefits to the population of the Island and improve their quality of life;
3. To minimise the risks of pollution from agricultural sources - primarily from slurry and nitrates;

4. To enhance the image of farming as adopting progressive practices that benefit the environment;
5. To support the marketing of Jersey produce - based on environmentally friendly agriculture;
6. To protect and enhance the visual attractiveness of Jersey for both residents and visitors - with benefits for other industries, such as tourism.

ERE: Policies and proposals

Stewardship in agriculture

5.139 A major theme of the countryside policies is the need for a sense of the stewardship of land. This is a broad term for the wise use of rural resources and is illustrated in Figure 5.1 'Interdependence in the Countryside'.

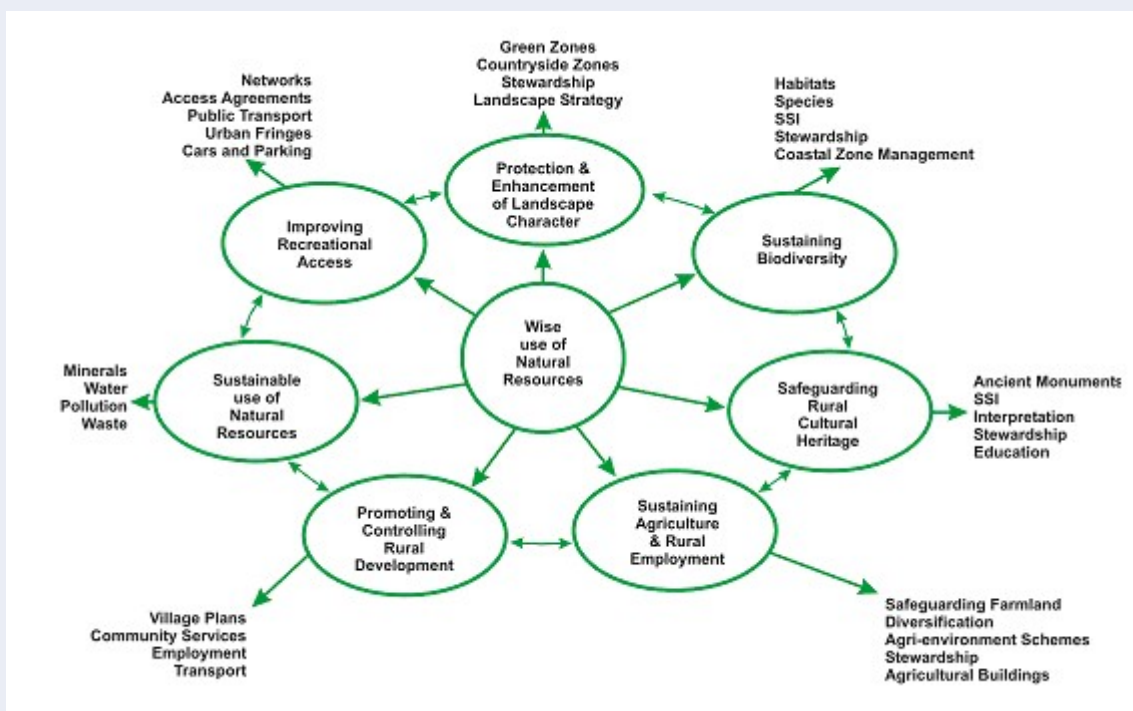


Figure 5.1 Interdependence in the Countryside

5.140 Farmers are regarded as the 'guardians of the countryside' and therefore provide a key role in land stewardship, with over half the area of the Island in the management of farmers or rural landowners. In the Island and elsewhere, stewardship has developed through a range of 'agri-environment' initiatives. These include:

- 'environmentally sensitive areas' where farmers are encouraged to help protect landscape and biodiversity in an extensive area of special interest;

- 'countryside stewardship' schemes where farmers are encouraged to enhance and restore specific landscape features and habitat and create public access;
- 'whole farm plans' where farmers are encouraged to enhance the countryside on an individual farm basis; and
- other schemes include: the promotion of woodland through conversion from agriculture; the encouragement of organic farming; and the opening up of access to the countryside through management agreements.

5.141 In Jersey the environment is of such importance and in need of appropriate management that, combined with the opportunities for farmers to diversify, the potential for stewardship is particularly strong. Clearly, such an approach is largely the joint remit of the Economic Development and Environment Departments, who have direct contacts with farmers and the appropriate mechanisms to encourage and assist them. Stewardship of the countryside is, by definition, an holistic approach and will involve the Minister for Planning and Environment.

Proposal 18

Stewardship in agriculture

The Minister for Planning and Environment will be supportive of schemes for the better stewardship of the Jersey countryside including agri-environment schemes, identification of environmentally sensitive areas, agri-forestry projects, countryside stewardship schemes, and whole farm plans.

Safeguarding farmland

5.142 It is important to Island life that agriculture is supported and remains viable to sustain the livelihoods of those engaged in farming and in other sectors that contribute to the improved management of Jersey's natural environment. It is also important to protect the meadows and cotils from domestication and an important aspect of this policy is to ensure that land that is of value to agriculture is safeguarded against inappropriate changes in use.

5.143 There are constant demands on agricultural land both from within and outside the industry, particularly as farmers look to diversify. However, it is wise to employ the 'precautionary principle' and continue to safeguard agricultural land.

Policy ERE 1

Safeguarding agricultural land

There is a presumption against the permanent loss of good agricultural land for development or other purposes. Where exceptions are proposed, the Minister for Planning and Environment will take into account:

- the impact on the viability of an agricultural holding;
- the nature of the proposed use;
- in the case of a dwelling, the requirement for reasonable private amenity space;
- the visual impact; and
- the recommendations contained in the Countryside Character Appraisal.

Diversification of agriculture and the rural economy

5.144 Changes in the structure of agriculture and economic challenges will drive diversification in the industry. The States [Rural Economy Strategy](#) promotes diversification in the industry and looks to the Minister for Planning and Environment to support the objectives of the strategy. Diversification might include organic production, energy crops or low intensity farming, or alternatively might include appropriate countryside activities outside farming such as recreation, crafts, product processing or environmental management. The Minister for Planning and Environment will generally support these activities where they do not introduce unwanted impacts and help support the farming community.

Policy ERE 2

Diversification of agriculture and the rural economy

The Minister for Planning and Environment will support proposals for diversification in the agricultural industry, provided that the development accords with Policy GD 1 'General development considerations' and does not conflict with policies for the safeguarding of countryside character and nature conservation .

The Economic Development Department will be consulted in respect of applications which seek diversification in the agricultural industry and their potential viability to the rural economy. Proposals which do not satisfy the above criteria will not be permitted.

Enabling development

5.145 "Enabling or linked development" is the term given to development of a site for purposes outside the landowner's principal business, with the capital so raised being used to fund the construction of facilities which will enhance business performance and/or have a positive environmental benefit.

5.146 The agricultural industry has a major strategic asset in its considerable land bank. It is self-evident that almost any business modernisation scheme could, in theory, be funded through the mechanism of obtaining development permission for non-agricultural development on part of that land. It should be equally self-evident that it would not be in the best long-term interests of the community to allow all and any such development to take place.

5.147 It is nevertheless possible for some business modernisation, with new facilities, to have a positive impact on the countryside, particularly when it is conditioned on the removal of unsightly, disused buildings, or on general amenity improvements. Such an arrangement might be used to achieve the clearance of derelict and eyesore sites, such as no-longer viable glasshouses, and the return of the site to a natural condition, as part of a larger package. There could be an element of 'cross-subsidy', in planning gain terms, with construction on one site being offset against amenity improvements on the same or a different site.

5.148 An underlying principle of the enabling policy is that the financial gain to the landowner from the development permitted should not exceed the investment necessary for new facilities to be constructed. The other key principle is that unrelated construction should not be the automatic 'first resort' of rural businesses seeking to fund the modernisation of their core operations.

5.149 The [Rural Economy Strategy](#)⁽¹⁰⁾ is a material consideration to which the Minister will have regard in determining applications which propose enabling or linked development and will also consult with the Economic Development Department on all enabling development proposals at an early stage to secure an independent and robust assessment of the business case for the proposals. The Minister is also concerned to ensure that applications for enabling development are advertised in a way that ensures that the nature of the proposal is brought to the attention of the public of the Island and will review the Planning and Building (Application Publication) (Jersey) Order 2006 to give effect to this.

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Policy ERE 3

Enabling or linked development

Applications that put forward enabling or linked development proposals will be required to clearly demonstrate to the satisfaction of the Minister for Planning and Environment that:

1. the enabling development will not significantly harm the archaeological, historic, biodiversity or landscape interest of the countryside asset or its constituent features, including the setting of important buildings;
2. the proposal avoids detrimental fragmentation of management of the countryside asset;
3. the enabling development will secure the long-term future of the countryside asset, and where applicable, its continued use for a sympathetic purpose;
4. adequate financial assistance is not available from any other source;
5. it is demonstrated that the amount of enabling development is the minimum necessary to secure the future of the countryside asset, and that its form minimises disbenefits;
6. the value or benefit of the survival or enhancement of the countryside asset outweighs the long-term cost to the community (i.e. the disbenefits) of providing the enabling development.

Applications for enabling development which do not meet all of the above criteria will not be permitted.

Proposal 19

Advertising enabling development proposals

The Minister for Planning and Environment will review the Planning and Building (Application Publication) (Jersey) Order 2006 to ensure that applications for enabling development are advertised in a way that ensures that the nature of the proposal is brought to the attention of the public of the Island.

Change of use and conversion of traditional farm buildings

5.150 Traditional farm buildings include granite barns and other buildings of traditional construction. Such buildings may become redundant because they are inefficient for modern farming, have fallen out of use due to changes of ownership or tenancy, are not part of a group any longer used for farming, or are not used because of farm consolidation elsewhere.

5.151 Many traditional farm buildings are Listed buildings and an important feature of the Island's farming heritage. Others may not be buildings of particular architectural merit but still contribute to the character of the Jersey countryside.

5.152 It is important that traditional buildings are used appropriately in order to ensure their survival. Ideally such buildings should not be lost to agriculture if there is still a requirement for them, but traditional farm buildings may also be suitable for uses such as housing, commercial use or tourist accommodation. Proposals for the change of use and conversion of buildings to non-agricultural uses, will require the applicant to prove that the buildings are redundant both to the farm operation or to agriculture as a whole.

5.153 Supplementary guidance on these issues is contained in Planning Policy Note No.2: The Future Use of Jersey's Traditional Farm Buildings and Planning Design Guide No.2: The Conversion of Jersey's Traditional Farm Buildings. The Minister for Planning and Environment takes the view that traditional farm buildings should retain their general appearance and distinctive agricultural identity after conversion.

Policy ERE 4

Change of use and/or conversion of traditional farm buildings

Applications for the change of use and/or conversion of traditional farm buildings to other appropriate commercial and community uses, residential or holiday accommodation, or the sale of fresh local farm produce, will be permitted, provided the building is redundant for agricultural use, and accords with Policy GD 1 'General development considerations'.

The redundancy of the building to both the farm unit and to agriculture as a whole, must be proved by the applicant

Change of use and conversion of modern farm buildings

5.154 Modern agricultural buildings, including large, multi-span metal-clad sheds and earlier concrete block structures, may become redundant due to restructuring of holdings and changes in the industry. Many of these buildings are located in isolated areas and are visually intrusive in the countryside. They were only granted permission, often in sensitive rural locations, because of the particular needs of agriculture and it could be argued that, if they are now redundant, they should be removed.

5.155 The change of use of agricultural buildings will only be considered where the redundancy of the building to the owner and to the agricultural industry is proven by the applicant to the satisfaction of the Minister for Planning and Environment, in consultation with the Economic Development Department. Some of the more recent, larger-scale agricultural buildings may be judged to be of strategic importance to the industry as a whole and their loss to agriculture will generally be resisted.

5.156 If alternative uses such as storage or light industry are to be considered, then the Minister for Planning and Environment will take into account the building's proximity to main roads and the nature of the particular use that is proposed. Moreover, it is important that the building has been used for agricultural purposes for at least five years. This will help to deter proposals for the construction of new agricultural buildings with a view to conversion later to non-agricultural use.

Policy ERE 5

Change of use and/or conversion of modern farm buildings

There will be a general presumption against the change of use and/or conversion to other use of modern farm buildings unless the redundancy of the building to the farm unit and to the agriculture industry as a whole is proven by the applicant, to the satisfaction of the Minister for Planning and Environment, that the building is not of strategic importance to the agricultural industry.

If the Minister is satisfied that the building is redundant to the needs of the agricultural industry, then consideration may be given to an alternative use provided that the proposed use is appropriate to the Island's economic needs, such as light industry, warehousing or distribution uses.

Proposals which do not satisfy these criteria will not be permitted.

Where permission is granted the Minister will, as appropriate, impose conditions relating to external storage of materials, parking, landscaping and visual improvements to the building.

New agricultural buildings, extensions and horticultural structures.

5.157 Changing trends in farming and horticulture can result in demands for new development to serve the industry. The guidance set out in the current Planning Policy Note for modern agricultural buildings provides guidance which attempts to balance the need to protect and enhance the Jersey countryside whilst recognising the need for modern, large buildings and extensions, which can be difficult to assimilate into the landscape. The Policy Note sets out criteria for the siting and design of agricultural buildings and the recommended procedure for those wishing to construct them. This policy should be read in conjunction with that guidance.

5.158 To prevent further damage to the character of the countryside that the impact of new agricultural buildings and structures can have, the Minister will require that all new development is subject to a clear requirement to remove the structure upon its redundancy to agriculture.

Policy ERE 6

Agricultural buildings, extensions and horticultural structures

There will be a strong presumption against proposals for agricultural buildings, extensions to existing agricultural buildings and horticultural structures unless it is demonstrated to the satisfaction of the Minister for Planning and Environment that the proposed development is essential to the proper function of the farm holding, will contribute to the viability of the Island's agricultural industry, and cannot be met from the use of existing agricultural buildings or horticultural structures elsewhere, which might be available for purchase or lease.

Where the Minister accepts the justification, the new development shall comply with planning policy note for modern agricultural buildings, be located within or adjacent to an existing group of buildings unless it can be demonstrated that a more isolated location is essential to meet the needs of the holding and accords Policy GD 1 'General development considerations'

The Minister will impose conditions and/or use planning obligation agreements to ensure the removal of agricultural buildings, extensions to existing agricultural buildings and horticultural structures should they become redundant to the agricultural industry.

Derelict and redundant glasshouses

5.159 Changes in the horticultural industry have led to many glasshouses becoming redundant and falling into disuse and eventual dereliction. Many owners and growers have an expectation that development for other purposes will be permitted on the site. However, glasshouses are regarded as temporary structures related to the agricultural/horticultural use of the land and are subject to the normal policies for the countryside.

5.160 The dereliction of glasshouses blights the landscape in many parts of Jersey and sterilises the land for other agricultural uses. Only in exceptional circumstances will such derelict sites be appropriate for non-agricultural development and it is the intention of the Department of the Environment that appropriate means are introduced to encourage or require landowners and horticulturists to remove these eyesores in order to enhance the countryside.

5.161 Any development of glasshouse sites will be considered on the planning merits of each individual site. However, if development is allowed, it will be limited to development with a value commensurate with the costs of removing the glasshouses and restoring most of the land to agricultural use.

Policy ERE 7

Derelict and redundant glasshouses

There is a presumption against the redevelopment of redundant and derelict glasshouses for other uses, unless the alternative use is directly related to agriculture or diversification of agricultural activity.

Glasshouses which have become surplus to the requirements of the existing user, but which are considered to be of value to the horticultural industry, should be retained in the industry and advertised for sale or rent.

Where glasshouses are no longer viable to the horticultural industry and a 'disuse and disrepair' condition is attached to the planning permission, then the landowner will be required to comply with that condition.

In exceptional circumstances, the development of redundant and derelict glasshouse sites may be considered for non-agricultural purposes, provided that the amount of development permitted will be the minimum required to ensure a demonstrable environmental improvement of the site by the removal of the glasshouses and any contaminated material, the reduction in the area of buildings, and the repair to the landscape, and accords with Policy GD 1 'General development considerations'.

Where disused or derelict glasshouse sites without a 'disuse and disrepair' condition are in a sensitive and isolated location, the Minister may consider the entire land-holding in order to determine the most appropriate area for development, which may not necessarily be on the site of the existing derelict glasshouses.

Proposals which do not satisfy these criteria will not be permitted.

Fishing and fish farming

Fishing for shellfish, wet fish and fish farming are important economic activities which need safeguarding and supporting. The policies aimed at sustaining marine biodiversity⁽¹¹⁾, will assist in ensuring the health of fish stocks and the conservation of their nursery grounds and feeding areas. It is also important that the industry is assisted in terms of its land based needs such as access, servicing, packaging and cold storage.

Policy ERE 8

Fishing and fish farming

The Minister for Planning and Environment will endeavour to safeguard the marine and land resources forming the basis of the fishing and fish farming industries through policies for marine conservation and control of development. Proposals to provide facilities and infrastructure which are essential for the fishing and fish farming industries will be supported, provided that the development accords with Policy GD 1 'General development considerations' and Policy NE 5 'Marine Zone'.

Visitor economy

5.162 Most people in Jersey are affected in some way by tourism and the wider visitor economy. It is important to distinguish between tourism and the wider visitor economy as a number of visitor attractions are increasingly reliant on attracting Island residents.

5.163 Without the income from visitors to the Island there would likely be:

- fewer air services and probably no fast ferries
- fewer shops and a more restricted choice

11 see Policy Ne5: Marine Zone

- a limited number of hotels and restaurants
- a poorer bus and taxi service
- less business for farmers, hairdressers, decorators, accountants and other small enterprises
- less income for Jersey Post and Telecoms and possibly higher charges

5.164 As a small, independent Island, Jersey has limited economic choices. The finance industry, the mainstay of the economy, faces its own long-term risks and threats, but there is little else to replace tourism. Decline in tourism would have significant wider repercussions. There is a synergy between tourism and other parts of the economy. The finance industry relies on much of the infrastructure which is supported by tourism such as hotels, transport and restaurants. Tourism helps project a positive image of Jersey to the outside world.

5.165 The great strength of tourism is that it is a sustainable activity based on the sensitive exploitation of Jersey's natural resources. Properly managed and developed, it has a long-term future and prospects for growth. Tourism cannot flourish in Jersey without the wholehearted support of the States and the wider community. There is a concern that tourism is taken for granted and not given the recognition it deserves.

5.166 Jersey's tourism started to decline during the 1990s. Whilst the number of visitors remained broadly constant until 1997, it fell by 10% from 1997-99. In 2005 the decline reversed, for the first time in many years, with a small increase in numbers. However, from 2005-2006 there was a 3% decrease in visitors. In 2007 there was a dramatic turnaround with nearly a 5% increase on 2006 figures and the Island may be starting to benefit from the significant capital investment that has taken place in the hospitality industry over the past five years. A total of 947,943 people arrived in Jersey in 2008, 41,775 more than in 2006. Staying holiday visitors account for just over half of these and one in five are leisure day trips. Business and conference visitors are also a significant element, with the UK being by far the most important market, accounting for 80% of holiday visitors

5.167 Tourism has also changed in other ways, with a decreasing length of stay, shorter booking times and a fall in the numbers of visitors in the main season. Visitors have also become older and more upmarket. The industry also faces a critical situation in recruiting and retaining staff due to the stringent employment and housing regulations. This is intensified by competition from the finance sector, making it difficult to operate efficiently, with high turnover and seasonal employment.

5.168 The countryside and marine areas form the basis of the Island's attraction to visitors and residents alike. The changes in the tourism industry towards catering for a more environmental or 'green' tourism are already being felt in the Island and will influence land-use planning and the countryside in the future. This is already evident in the development of coastal footpaths, cycle-ways and Green

Lanes, and demand for car parking, signage and interpretation. Access in the countryside often raises conflicts with landowners and a balanced, agreed approach is essential if all are to benefit.

EVE: Objectives

Objective EVE 1

Tourism objectives

1. To maximise economic and other benefits brought by visitors, whilst minimising any adverse impact on residents, businesses and the environment ;
2. To sustain ongoing improvements in the range, quality and sustainability of visitor and leisure attractions for the benefit of local residents and visitors.

EVE: Policies

Visitor accommodation, tourism and cultural attractions

5.169 A strong and high quality visitor product is a key ingredient of a successful tourist destination. In order for Jersey to compete in the future, it will have to ensure that its product grows and changes to meet different expectations. The Island Plan has a role to play by supporting and enabling the tourism industry to compete sustainably to the benefit of the Island.

5.170 For tourism to be able to compete successfully, the industry will need to respond to ever-increasing consumer expectations and the needs of its target markets. Jersey will find it hard to compete effectively in the market place with its existing accommodation stock if it is not sufficiently diverse or modern in the facilities it provides.

5.171 In certain cases, refurbishment or extensions to existing properties will not be able to provide the required standards or configurations. It is likely that there will be a need to consider new hotels, guest houses, self-catering and camping sites during the Plan period.

5.172 The tourism industry has suffered the loss of almost a third of its hotel stock since the mid-1980s from competing land-uses. There is concern in the industry that this loss cannot be sustained indefinitely and that, if the industry is to address the decline in existing markets and compete for a share of new markets, the quantity, range and quality of accommodation needs to be addressed.

5.173 The Minister for Planning and Environment recognises that over the last few years many tourism-related properties have been converted to residential use. Accordingly, the Minister will not necessarily regard the loss of residential units as an obstacle when considering applications for new or extended tourism accommodation

5.174 The Minister also recognises the dilemma between policies to protect and enhance the coasts and countryside and policies which seek to facilitate developments in the tourism industry to enable visitors to enjoy our unique environment. That dilemma can be resolved within the policies set out if proposals for new tourist related accommodation recognise the sensitivity of the areas covered by policies for the countryside.

5.175 The Minister has set out the criteria for development in the countryside and the presumptions against development, including those related to tourism, exist to protect and maintain those areas.

5.176 Provision of new attractions helps a destination to retain or grow its market share and remain competitive in the face of changing consumer expectations and innovations. Similarly, the ability of an existing attraction to upgrade, re-invent itself or extend its operation is important to the continued viability of that attraction and the overall success of the visitor destination. The Minister will consider proposals for new or extended tourism and cultural attractions in accordance with the advice appropriate to the zoning of the site. Where there is a presumption against development, the Planning and Environment Minister will require clear evidence of the benefits of the proposals and how the development will enhance, or mitigate, the impact on the location.

Policy EVE 1

Visitor accommodation, tourism and cultural attractions

The development for new tourism accommodation, and extensions to existing hotel, guest house, other tourism (including self-catering) accommodation and visitor attractions, will be permitted within the identified built up area boundary provided it accords with Policy GD 1 'General development considerations'.

Within the Green Zone, proposals for visitor accommodation, tourism and cultural attractions will be determined in accordance with Policy NE7 'Green Zone'.

Within the Coastal National Park, proposals for visitor accommodation, tourism and cultural attractions will be determined in accordance with Policy NE 6 'Coastal National Park'.

Proposals for visitor accommodation, tourism and cultural attractions with implications for the Marine Zone will be determined in accord with Policy NE 5 'Marine Zone'.

Tourist Destination Areas

5.177 There are a number of components that make a successful visitor destination within the Island. These include a wide range of accommodation and attractions, good transport links, a high quality built or natural environment, a range of events and activities and strong visitor support facilities.

5.178 The support facilities are very often visitor attractors in their own right - a quality restaurant, cultural and recreational facilities, a good public house or a scenic coastal promenade, for example, are an important part of the overall ambience of a visitor destination. They bring an extra vibrancy to an area, help retain visitors and support the accommodation and attractions. Very often their cumulative loss can have a detrimental effect on an area's tourism identity, as witnessed at Havre des Pas, which has lost some of its appeal to visitors by the loss of hotels and their replacement with housing.

5.179 There still remain a number of destinations in the Island which have a concentration of visitor support facilities and attract a high percentage of Island visitors and residents. Within these destinations, it is advantageous to protect the existing, and facilitate new, visitor support infrastructure. In order to limit the effect of a further erosion of tourist support facilities from existing locations which are considered to be of a strategic importance to the Island's tourism industry, the Island Plan designates the following locations as Tourist Destination Areas. These locations are illustrated on the Proposals Map:

- St Aubin;
- St Brelade's Bay;
- Havre des Pas; and
- Gorey.

Policy EVE 2

Tourist Destination Areas

Within the Tourist Destination Areas designated on the Proposals Map, the Minister will support:

- environmental enhancements to the public realm;

- proposals for al fresco activities associated with restaurants, bars, cafés and outdoor performances; and
- improvements in accessibility for pedestrians, cyclists and public transport users and associated signage.

Proposals for new tourist accommodation and support facilities will be permitted in the Tourist Destination Areas provided that the development accords with Policy GD 1 'General development considerations'.

Proposals with implications for the Marine Zone will be determined in accord with Policy NE 5 'Marine Zone'.

Tourism support facilities in the countryside

5.180 The quality of the countryside is a key asset to the Island's tourism industry. Primary consideration will be given to the protection of the countryside, both in terms of the impact from supporting facilities and from associated visitor use. The provision of support facilities, however, such as car parks, toilets, cafés and kiosks, can assist access to the countryside for visitors and local residents and improve the experience for visitors.

Policy EVE 3

Tourism support facilities in the countryside

Proposals for tourism or support facilities including public conveniences, cafés and kiosks will be permitted where the proposal promotes informal recreational activities appropriate to the sensitivity of the countryside and accords with Policy GD 1 'General development considerations'.

Within the Coastal National Park, proposals for tourism support facilities will be determined in accordance with Policy NE 6 'Coastal National Park'.

Beach kiosks

5.181 Beach kiosks are typically small outlets selling snacks and drinks, and are an intrinsic part of life at the seaside. It is important that the service they provide is retained. Developments that require substantial extensions and involve a change in the character and function of an existing kiosk will not normally be allowed.

5.182 Some new kiosks may be approved in beach-front locations, particularly where there is limited provision at present. Such proposals should be considered under the auspices of Policy EVE: 'Tourism support facilities in the countryside'.

Policy EVE 4

Beach kiosks

The Minister for Planning and Environment accepts that existing beach kiosks and cafés provide for the special needs of beach users.

There will be a presumption against the loss of catering facilities for beach users.

Proposals for the change of use of a kiosk/café to a restaurant or other use, which no longer serves the beach trade and where it would result in a substantial increase in the size of the existing building will not be permitted.