Our Hospital

Environmental Impact Statement

Chapter 11 - Socio-Economics

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11 Socio-economics

11.1 Introduction

This EIS chapter describes the assessment of effects on socio-economic receptors during the construction and operational phases of the proposed Our Hospital Project (OHP), Jersey. It considers relevant legislation, policy and guidance; presents the assessment methodology used; establishes the baseline situation against which the assessment is made; and subsequently considers potential construction and operational effects, proposing mitigation measures where necessary. A summary of socio-economic effects and proposed mitigation measures is presented at the end of the chapter.

11.1.1 Legislation

Legislation of relevance to the socio-economic assessment is considered below. This focuses on employment, residential status and the wider economy of Jersey.

The Employment (Jersey) Law 2003[1] is set out to specify terms of employment, compulsory leave, rights to protect against unfair dismissal and a minimum wage.

The Control of Housing and Work (Jersey) Law was introduced in 2012 in order to 'enable Jersey to preserve and maximise the benefits of its resources'. This system of registration cards, which are required when moving into a property or starting work, replaced social security cards. There are four categories of residential status in Jersey, which determine where residents can live and work. These are set out in Table 11.1 below.

Table 11.1: Residential Status

Residential Status	Definition	Housing	Work
Entitled	Someone who has lived in Jersey for 10 years (more details below)	Can buy, sell or lease any property	Can work anywhere and doesn't need permission to be employed
Licensed	Someone who is an 'essential employee'	Can buy, sell or lease any property, apart from assisted purchase or social rented housing, in their own name if they keep their 'licensed' status	Employer needs permission to employ a 'licensed' person
Entitled for work	Someone who has lived in Jersey for five consecutive years immediately before the date the card is issued, or is married to someone who is 'entitled', 'licensed', or 'entitled for work'	Can buy property jointly with an 'entitled' spouse / civil partner. Can lease 'registered' (previously 'unqualified') property as a main place of residence.	Can work anywhere and doesn't need permission to be employed
Registered	Someone who does not qualify under the other categories	Can lease 'registered' property as a main place of residence	Employer needs permission to employ a 'registered' person

Source: Residential statuses Jersey Government[2]

11.1.2 Policy context

Policy of relevance to the socio-economic assessment is contained within the Government Plan 2021 to 2024, the Jersey Island Plan 2011, the draft Bridging Island Plan and supplementary planning guidance (SPG), namely the 'Our Hospital Supplementary Planning Guidance: Advice Note[3]' published in May 2020.

The Government Plan 2021-2024

The GoJ Government Plan sets out the government's programme of work for the next 3 years (2021-2024).

The Government Plan confirms that the GoJ will implement the new Jersey Care Model, which 'will support the move to a more preventative-focussed and community-based health service enabling it to cope better with the forecast increased demand from demographic change.' It also confirms that the GoJ remains focussed on delivering a new hospital for Jersey.

The Government Plan also sets out the GoJ's proposals to design new Control of Housing and Work Law permissions and structures (as referenced in section 11.1.1) which will 'allow Government to maintain closer control of the number of workers settling permanently in Jersey.'

[1] Employment (Jersey) Law 2003. Available at: https://www.jerseylaw.je/laws/superseded/Pages/2006/05.255.aspx

[2] Available at: https://www.gov.je/Working/Contributions/RegistrationCards/Pages/ResidentialStatus.aspx

[3] GoJ (2020) https://www.gov.je/SiteCollectionDocuments/Planning%20and%20building/ID%20Supplementary%20Planning%20Guidance%20Our%20Hospital%20FINAL.pdf

The Jersey Island Plan 2011 and Revised 2011 Island Plan 2014

The Jersey Island Plan was adopted in 2011 and revised in 2014. The Plan has a number of strategic and specific policies of direct or indirect relevance to the Our Hospital Project and in particular this assessment. These have been summarised below.

Strategic Policies

Policy SP1 Spatial Strategy sets out that development will be concentrated within the Island's built-up area, as defined on the proposals map, and, in particular, within the Town of St Helier.

Policy SP5 Economic Growth and diversification states that 'high priority will be given to the maintenance and diversification of the economy and support for new and existing businesses, particularly where development can attract small footprint/high value business from elsewhere and foster innovation, in the following ways:

- the protection and maintenance of existing employment land and floorspace for employment-related use;
- the redevelopment of vacant and under-used existing employment land and floorspace for new employment uses;
- the provision of sufficient land and development opportunities for new and existing employment use.'

Specific Policies

Policy E1 relates to the protection of employment land and states that 'the government seeks to protect land earmarked for employment purposes from residential or other development. As a small island with a finite amount of land this is particularly important in order to ensure Jersey can remain a self-sustaining economy.'

Policy ER2 is focused on Saint Helier and sets out the government's intention to protect Saint Helier as the main centre for retail and will consider development that would help to enhance this function.

Policy ERE1 focuses on the safeguarding of agricultural land, it sets out that there is a presumption against the permanent loss of agricultural land for development or other purposes. It also states that where exceptions are proposed the Minister for Planning and Environment will consider; the impact on the viability of an agricultural holding and the nature of the proposed use and the Countryside Character Appraisal.

Policy H11 states that proposals which would result in the loss of housing units will not be permitted except where it can be justified against one of the following:

- the replacement of sub-standard accommodation;
- better meeting the Island's housing need (housing mix);
- the maintenance and/or enhancement of the historic environment; or
- where the 'value of the development to the Island outweighs the loss or reduction in the Island's housing stock.'

Policy SCO3 relates to community facilities and sets out that the 'the alternative development of community facilities will only be permitted where it can be demonstrated that they are no longer required to meet the needs of the local community.'

Policy SCO4 states that the loss of open space will not be permitted unless it can be demonstrated that the loss will not impact the adequacy, quality and accessibility of provision, alternative provision (of same or better extent, quality and accessibility) can be provided, the proposal will be of greater community or Island benefit than existing open space or the loss would not seriously harm the character and appearance of the locality.

The draft Bridging Island Plan

The former Jersey Island Plan was published in 2011. In 2019 it was announced that the Plan was to be reviewed and preparation commenced to develop a new Island Plan setting out the land use priorities of GoJ from 2021-2030. In light of the Covid-19 pandemic, the GoJ Minister for the Environment, announced that the future Island Plan would be delayed until 2025 and in the short term a 'bridging plan' was to be published to, 'set the means to facilitate the island's positive future growth over a period of significant uncertainty and provide a new framework against which planning decisions will be made.'

The following policies contained within the draft bridging Island Plan are considered to be of relevance to this assessment:

Policy SP4 of the plan supports economic development, which serves to strengthen and contribute positively to Jersey's local and international identity.

Policy SP6 relates to a 'sustainable island economy'. It sets out that the Plan supports the protection and maintenance of existing employment land and floorspace for employment-related uses, economic development that: 'supports and enhances the vitality and viability of Town or helps regenerate Les Quennevais'.

Policy SP7 states that development must be located and designed to avoid environmental risks and, where necessary, demonstrate how measures to minimise and mitigate any impacts arising from identified environmental risks have been incorporated, as far as reasonably practicable. It also sets out that new or improved public infrastructure will be supported where it is required and will be resilient to future, changing needs.

Policy CI3 of the draft Bridging Island Plan (herein referred to as 'the plan') relates to OHP. This states that proposals for the project will be afforded the highest level of priority and supported where, 'the proposal is not considered to cause serious, unacceptable harm to the character and amenity of the wider area or neighbouring uses.'

Policy CI4 states, 'the redevelopment of existing community facilities for alternative uses will not be permitted except and only where it can be demonstrated that the site, or any part of it, is surplus to wider community needs.' Policy CI5 is focused on sports, leisure and cultural facilities and the policy approach for redevelopment is identical to that presented under policy CI4.

Policy CI7 is concerned with protecting open space, it states that 'The loss of protected open space will not be supported and will only be permitted in exceptional circumstances' including where the proposed development is of a greater community benefit or proposals include details of how the loss of open space will either be managed or offset by other means.

Policy GD4 focuses on enabling or linked development proposals, it states that such proposals will only be supported where, it is agreed that relocating an existing use, in order to accommodate a new use, will lead to a significant environmental, community or economic benefit to the island; the development is considered necessary in order to mitigate or manage the impact of another development that is of significant benefit to islanders; or the development is considered necessary in order to deliver critical infrastructure. In addition, it states that the overall benefit of accepting the development should outweigh the harm posed.

Policy GD5 sets out that the demolition and replacement of buildings is only considered acceptable in the following circumstances:

1. It is not appropriate in sustainability terms, and/or economically viable, to repair or refurbish it; and
2. the proposed replacement building, or part of a building represents a more sustainable use of land having regard to the density of existing and proposed development, overall carbon impact, waste generation, and the use and performance of materials and services.

Policy H6 states that development which would result in a net loss of supported homes will only be acceptable in circumstances where the proposal would result in the replacement of substandard accommodation with homes that meet current standards, or the replacement homes would better meet the island's housing need. Policy H7, is specific to key worker homes. Similarly, it sets out that development proposals which would result in a net loss of key worker homes will not be supported except where, either the proposal would result in the replacement of substandard accommodation with homes that meet current standards; or it can be demonstrated that alternative provision can be made elsewhere; and that there will be no net loss in supply of key worker homes.

[4] Business Jersey (2019) Jersey Destination Plan, https://business.jersey.com/sites/default/files/components/pdf_download_row/0027%20VJ%20Destination%20Plan%20January%202019%20version%20AWK%20%28Spreads%29.pdf

The Jersey Destination Plan

The Jersey Destination Plan outlines the importance of tourism to the island's economy and has an ambitious aspiration of receiving 1 million annual visitors spending £500m[4]. The Plan updates the former Destination Plan published in 2015. Notably it presents a more positive picture in relation to accommodation stock. It acknowledges that between 1992 and 2017 there was a decline in overall accommodation stock with the number of establishments reduced by 65% and the number of bedspaces available reduced by 56%.

However, since 2018 the Plan reports that Jersey has witnessed further investment, with an increase of 292 bedspaces in 2018 alone, helped by the opening of a Premier Inn on the Island. The Plan also includes the following key statistics:

- Hotels account for 73% of all bed spaces on the island compared with 68% in 1992.
- Guest Houses now represent 7% of all bed spaces, down from 17% in 1992.
- In November 2018 there were 145 properties on Airbnb showing for let in Jersey. This number increases significantly in summer.

Our Hospital Supplementary Planning Guidance: Advice Note

The Our Hospital SPG[5] includes advice in relation to socio-economic impacts and states that these are likely and should be assessed.

It sets out that socio-economic impacts are likely to include:

- Loss of existing businesses (directly displaced by the development);
- Wider impacts on businesses;
- Loss of homes; and
- Opportunity costs, where the development of the OH might preclude the use of land for other uses of public or socio-economic value to the island and alternative costs should be factored into any assessment.

It also notes that 'there would also be substantial labour market implications given the scale of development taking place in a small island with a limited labour market of construction workers.'

These matters are addressed within the assessment of effects (Section 11.6).

In relation to amenity, the advice note also states that any amenity impacts in relation to increased vehicular activity should be addressed and mitigated where possible. The assessment of effects presented below considers the impact on amenity of neighbouring residents, businesses and community receptors.

[5] GoJ (2020) Our Hospital Supplementary Planning Guidance: Advice Note, https://www.gov.je/SiteCollectionDocuments/Planning%20and%20building/ID%20Supplementary%20Planning%20Guidance%20Our%20Hospital%20FINAL.pdf

11.1.3 Relevant guidance

There is no specific guidance on socio-economic assessment for EIS in either Jersey or the UK. As such best practice and professional experience has been used in developing a bespoke assessment methodology and determining significance in the absence of any published guidance in relation to specific assessment criteria /thresholds (as presented in section 11.3).

Notwithstanding this, both planning policy in Jersey and in the UK is focused on sustainable development and the need to balance economic, social and environmental issues. The draft Bridging Island Plan confirms this stating:

'Future Jersey highlights that islanders want Jersey to be developed in a sustainable way and that all community, environmental and economic needs are met without being detrimental to the island. Through the sustainable development of the island, the Island Plan is committed to ensuring that the needs prioritised in Future Jersey will be met for all islanders both in the short and long-term[6].'

11.2 Scoping and consultation

11.2.1 Scoping

The scope for socio-economics includes an assessment of direct and indirect impacts of the proposed development on:

- Operational and construction employment;
- Housing;
- Amenity of surrounding residents, businesses and community facilities (including demolition and access).

The approach to the assessment has not changed from that presented within the Scoping Report (Appendix A1).

The Head of Development and Land for GoJ was consulted on the Scoping Report. Two comments were received which are presented in Table 11.1 along with a response from the socio-economic assessment team.

Table 11.2: Response to scoping opinion

Scoping opinion clause	Response
11.3 – I think your population figures might be out of date. Latest estimate is 108,000. Please check with Statistics Jersey.	The latest population figures have been checked, and updated accordingly.
11.5.1 – does this include an assessment of any impact of moving the hospital away from the existing site, particularly in terms of the loss of footfall and custom to local shops/businesses?	This assessment focusses on the potential effects of the proposed development. The future of the current hospital site is yet to be formally determined, with any proposed future uses subject to a separate planning application and assessment of impacts. Depending on the future use of that site, impacts on local businesses in terms of footfall / spend are difficult to predict and therefore assess.

[6] GoJ (2021) The draft Bridging Island Plan consultation, https://www.gov.je/SiteCollectionDocuments/Environment%20and%20greener%20living/C%20Draft%20Bridging%20Island%20Plan%20Digital.pdf, page 15.

11.2.2 Consultation

The OHP team has undertaken extensive consultation throughout the development of the proposed project. This has included focussed consultation with businesses and residents who would potentially be directly affected by the proposal. The outcome of this consultation has been considered throughout the assessment.

Consultation has been specifically carried out to inform OHP's Social Value strategy and this included, workshops focused on socio-economic considerations such as jobs and growth and a social value survey. The results of the consultation found that training opportunities and upskilling were identified as a key need by the general public as well as ensuring that local businesses can access supply chain opportunities, so that local spend can be maximised, and these are considered further within this assessment. Further information on the consultation findings can be found within the OHP Social Value Statement which forms part of the planning application.

11.3 Methodology

11.3.1 Overview

A desk-based study of the socio-economic baseline has been conducted using data from Statistics Jersey[7]. A wide range of possible socio-economic receptors has been identified, based on experiences from similar previous developments and extensive consultation with local stakeholders. Impacts on these receptors have been assessed for significance based upon the magnitude of the effects and sensitivity of the receptors.

11.3.2 Study area

The study area predominantly focuses on the population and local community of the island of Jersey. Where relevant, the baseline will present data at parish level for the parish of St Helier; however, most of the relevant business and socio-economic data produced by the GoJ is available only for the island as a whole.

[7] https://www.gov.je/Government/JerseyInFigures/AboutStatisticsJersey/pages/whowearewhatwedo.aspx

Therefore, the focus of the baseline and of the assessment will be on Jersey, with local analysis of effects for people and businesses in St Helier presented only where relevant and where data is available.

In terms of considering indirect effects on housing, community and business receptors, a focused study area has been considered, incorporating all receptors within 50 metres of the redline surrounding the site. In consideration of the location and potential socio-economic impacts of the proposed project, is considered that this is a suitable study area to be able to consider receptors that have the potential to experience indirect effects.

11.3.3 Assessment methodology

The socio-economic receptors used in this assessment were chosen based upon the specific context of the proposed development as well as examples from previous developments and consultation with local stakeholders. These aim to reflect the broad range of channels through which the proposed development could affect the economy and community and are set out in the Table below.

Table 11.3: Socio-economic receptors

Receptors	Description
Local residents	Effects on housing and the amenity value of the area for residents
Local businesses	Effects on the trade of local businesses
Labour market	Effects on local demand for labour and the extent to which offshore labour is required
Property market and land use	Effects on demand in the property market
Hospital services	Effects on the functioning of hospital services

Magnitude of effects

The magnitude of effects takes into account both the degree of the potential change to socio-economic conditions, and the scale of the change in terms of the number of receptors likely to be affected. The definitions used in the assessment are provided in Table 11.4.

Table 11.4: Magnitude of effects

Magnitude of effects	Criteria
High	A direct or indirect effect that would be adverse or beneficial and would be very likely to result in total or permanent changes to baseline conditions for a large number of businesses, individuals, groups of individuals, or other receptors.
Medium	A direct or indirect effect that would be adverse or beneficial and would be likely to result in partial changes to baseline conditions for a moderate number of businesses, individuals, groups of individuals, or other receptors.
Low	A direct effect that would be adverse or beneficial and would be likely to result in minor changes to baseline conditions for a small number of businesses, individuals, groups of individuals, or other receptors.
Negligible	A direct or indirect effect that would be likely to result in very minor or no changes to baseline conditions for businesses, individuals, groups of individuals, or other receptors.

Receptor sensitivity

Receptor sensitivity reflects the economic, social or community value of the receptor, and the extent to which it is considered the receptor has capacity to accommodate potential changes. The definitions of receptor sensitivity used in the assessment are provided in Table 11.5.

Table 11.5: Receptor Sensitivity

Receptor sensitivity	Criteria
High	Businesses, individuals, groups of individuals, or other receptors possessing very significant economic, social or community value, that are identified as having very low capacity to accommodate potential changes without incurring a material loss (or gain).
Medium	Businesses, individuals, groups of individuals, or other receptors possessing locally significant economic, social or community value, that are identified as having some capacity to accommodate potential changes without incurring a material loss (or gain).
Low	Businesses, individuals, groups of individuals, or other receptors possessing some local economic, social or community value, that are identified as generally having capacity to accommodate potential changes without incurring a material loss (or gain).

Significance Criteria

Significance is deduced by considering both the magnitude of the effects and sensitivity of the receptor. This is shown in Table 11.6.

Table 11.6: Significance criteria

		Magnitude			
		High	**Medium**	**Low**	**Negligible**
Sensitivity	High	Major	Major	Moderate	Minor
	Medium	Major	Moderate	Minor	Minor
	Low	Moderate	Minor	Minor	Negligible

11.3.4 Limitations and assumptions

Limitations

The assessment is intended to identify impacts of the proposed development, quantify these where possible and then provide a qualitative assessment whether the effects of these impacts are of a beneficial or adverse nature.

Much of the demographic data available for Jersey is contained within the 2011 census. It is acknowledged that this data is 10 years old, however in many cases, it remains the most reliable data source for the purposes of the socio-economic baseline. Where possible, research has been undertaken to establish more up-to-date sources and any assumptions made in relation to the data is clearly presented within the baseline environment in section 11.3.5.

Jersey socio-economic data is also rarely broken down to the lower geographic level. Some data is available by parish, but this is much less than what is published at the lower level in the census for England and Wales. In any case, given the small size of the island, large scale of the proposed OHP and the fact it will serve the island as a whole for many socio-economic receptors a study area consisting of the whole of the economy is considered appropriate. Baseline Environment.

In the absence of published guidance and advice in relation to socioeconomic assessment, the assessment utilises a methodology which has been established, tested and accepted through other major schemes (for example High Speed 2) and relies in part on the professional judgement of the author in drawing conclusions.

Assumptions

In completing the assessment of socio-economic effects, a number of assumptions have been made, particularly in relation to employment estimates. These include:

- Where the relocation/reprovision of existing facilities is required as part of the proposed development it is assumed that this will be of an equivalent size and quality to the existing.
- Unless otherwise referenced, the data used to inform the assessment of effects, particularly in relation to employment figures during construction and operation has been provided directly to the project team by GoJ and the contractor team.
- The employment data analysis has assumed displacement[8] and deadweight[9] values to be 10% based on the scale of the project.
- As set out within section 11.5.1 it has been assumed that 20% of those working on the project would be 'lifetime staff'.
- The timescales referred to within the assessment are based on the construction programme at the time of writing and may be subject to change.

11.3.5 Baseline environment

Economic Profile

In 2019, Jersey's Gross Domestic Product (GDP) was £4,885 million. In terms of Gross Value Added (GVA), which is generally understood to provide a more accurate reflection of the role of the Island's banking and financial services sector, total GVA was £4,972 million. This represented an increase of 2.1% in real terms on an annual basis which was largely driven by the financial services sector. This sector saw GVA increase by 4% in real terms, the non-finance sectors saw GVA increase by 1% in real terms[10].

Tourism

Tourism plays an important role in Jersey. The last full tourism data analysis undertaken by the GoJ was in 2019. In 2019, the Island received 770,700 holidaymakers, an increase of 6% on the previous year. Total visitors spend in 2019, was £279.8 million[11] which represented an increase of 4% from the previous year.

Equivalent data for 2020 was curtailed as a result of the Covid-19 pandemic, when employment guidelines resulted in the cessation of all fieldwork from the 14th March of the same year. As such data for 2020 is limited to statistics for January-mid-March.

Notwithstanding this, previous data compiled between 1997 and 2017 shows a longer-term declining trend in the number of visitors to the Island. The 2017 figures represent a decrease of 26% from 1997, when 985,000 visits were recorded. The average length of stay has also decreased from 5.7 nights in 1997 to 4.2 nights in 2015[12].

The latest accommodation figures available date to 2017. In 2017 the total number of persons that could be accommodated in registered visitor accommodation in Jersey was 10,608[13]. Table 11.7 below shows the breakdown of registered visitor accommodation in Jersey in 2017.

[8] Displacement: relates to the extent to which the project has led to reduced construction activity elsewhere.
[9] Deadweight: relates to how much construction activity would have happened irrespective of the project.
[10] GoJ (2019) Measuring Jersey's economy GVA and GDP – 2019, https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20GVA%20and%20GDP%202019%2020201002%20SJ.pdf
[11] GoJ (2019) Jersey Statistics, https://business.jersey.com/jersey-statistics
[12] Data for 217 shows considerable variation in length of stay depending on mode of arrival. Among those arriving by air, the average length of stay was 5.7 nights, while for those leaving by ferry it was 2.7 nights.
[13] GoJ (2017) https://opendata.gov.je/dataset/tourism-statistics/resource/59c9f0d6-1620-4424-a724-3d61aed32f7f

Table 11.7: Registered Visitor accommodation in Jersey, 2017

	Hotels	Guesthouses	Self-Catering	Campsites	Youth Hostels	All visitor accommodation
Total premises	58	35	32	6	2	133
Total bed spaces	7,589	796	-	-	146	8531
Total bedrooms	3,724	398	-	-	33	4,155
Self-catering spaces	62	35	1,193	-	-	1,290
Self-catering units	19	9	338	-	-	366
Campsite bed spaces	-	-	-	747	40	787
Total persons accommodated	7,651	831	1,193	747	186	10,608

Source: Visit Jersey

In 2017, the average room occupancy was 66% and the average daily room rate was £112.00[14].

Population and Labour Market Conditions

Population

The total population of Jersey at the time of the 2011 census was 97,857 people. In terms of population by parish, St Helier accounted for over a third of the population of Jersey with 34% of the population, this was followed by St Saviour (14%) and St Brelade (11%). St Helier also recorded the largest population density at 3,541 persons per km^2 and it also experienced the largest population increase (18%) between the 2001 and 2011 census[15]. The table below shows the population of Jersey by parish. It illustrates that areas outside St Helier, St Clement, St Brelade and St Saviour generally have a much lower population density, reflecting the rural nature of the Island and the concentration of the population within St Helier.

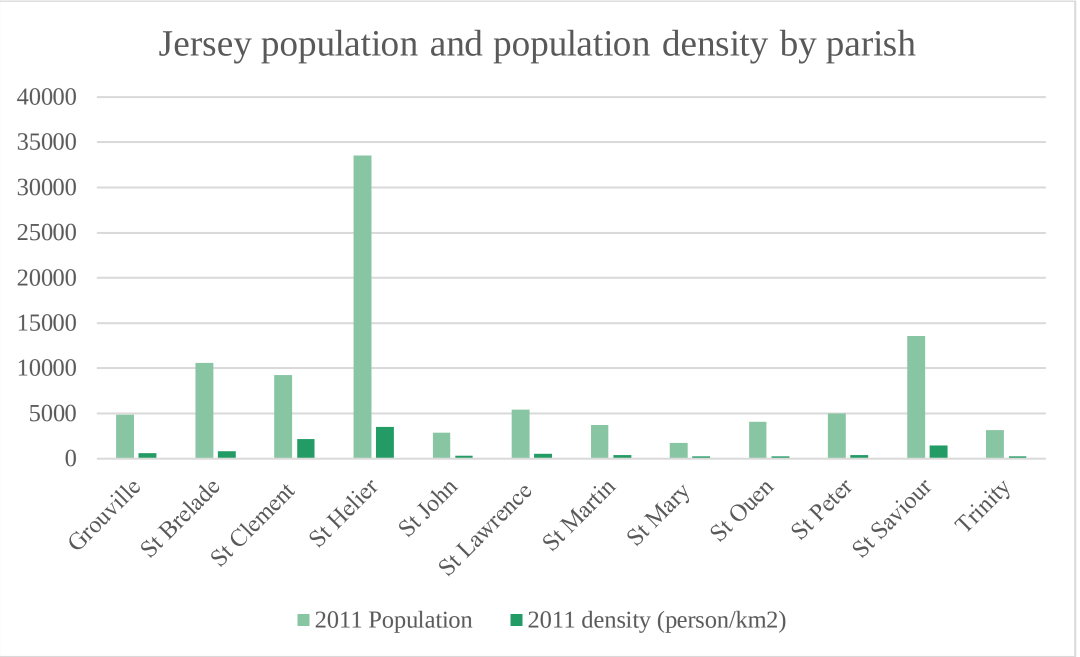

Figure 11.1 Jersey population density by parish (Census 2011)[16]

The most recent population projections estimate that by year-end 2019 the population of Jersey was 107,800, an increase of 9,943, or 10.2%[17]. By way of comparison, the UK population is estimated to have increased by 5.4% from the 2011 census to mid-year 2019[18].

Approximately 80% of the increase in the resident population of Jersey from 2009-2019 is attributed to net-inward migration[19] which averages at +1,000 people per year into the Island. Population projections estimate that if this trend were to continue, the population of Jersey would be 128,800 by 2035, rising to 166,000 by 2065[20].

According to 2011 census data, 50% of the total population of Jersey were born on the Island. Nearly a third (31%) were born in the British Isles (England, Scotland, Wales, Northern Ireland and other Channel Islands) whilst 7% were born in Portugal/Madeira. Approximately 4% were born outside of Europe. Two-fifths (40%) of recent arrivals were born in the British Isles[21].

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14 Based on participating hotels in the STR benchmarking survey, see: https://www.gov.je/Government/JerseyInFigures/BusinessEconomy/Pages/Tourism.aspx
15 GoJ (2011) 2011 Census Chapter 1 https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Chapter1TotalPopulation%2020120808%20SU.pdf
16 Data from census 2011, graph created by Arup
17 GoJ (2021) https://www.gov.je/Government/JerseyInFigures/Population/Pages/Population.aspx
18 ONS (2021) https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland
19 GoJ (2019) https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Population%20Estimate%20Current%2020180620%20SU.pdf
20 GoJ (2016) https://www.gov.je/Government/JerseyInFigures/Population/Pages/PopulationProjections.aspx
21 GoJ (2011) 2011 Census Chapter 2, https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Chapter2PopulationCharacteristics%2020120808%20SU.pdf

Residential Status

Data from the 2011 Census pre-dates the introduction of the current four categories of residential qualification, and therefore provides information based on the previous system. This is set out in Table 11.8 below. As of 2011, the majority (82%) of total residents and 11% of recent arrivals were in categories A to H, which is broadly comparable with the current classification of ‘entitled’. 13% of residents and 66% of recent arrivals had no residential qualification, broadly comparable with the new classification of ‘registered’. Smaller proportions of residents fell into other categories. Of those with no residential qualification, and therefore unable to buy property, close to 70% were aged under 35, and 65% were recent arrivals[22].

Table 11.8: Residential Status

Residential status category	Total	Recent arrivals
A to H	82%	11%
J	2%	12%
Spouse	3%	11%
No residential qualification	13%	66%

Source: 2011 Census

Data from December 2013 to 2020 show that jobs filled by those with ‘entitled’ residential qualification made up approximately 90% of all jobs over the period. However, it should be noted that the data only considers jobs in the private sector.[23]

Age Structure

The island has a large proportion of residents of working age, with 70% aged between 15 and 64. There are correspondingly low proportions of children and of residents in older age groups, with a total of 15% of residents aged 65 and over, including 4% aged 80 and over[24]. By comparison, 66% of UK residents fall into working-age groups, with larger proportions of children and of adults in older age groups.

According to 2025 Jersey population projections, in the scenario of no inward or outward migration, 15% of the residents will be aged up to 15 years, 62% will be of working age, aged between 16 and 64 and 21% will be aged 65 and over. The scenario is the most conservative one as migration is likely to increase the resident population of Jersey, especially the working age demographic. [25]

Employment and economic activity

Table 11.9 shows economic activity rates among the working-age population, using data from the 2011 Census. In total, 82% of working-age residents are considered economically active. Almost one in six (15%) adults over working age[26] were economically active. Of the economically inactive working age population 36% were in full-time education and 19% were unable to work due to sickness or disability, 10% were retired.

Table 11.9: Economic Activity among working age population 16-59/64 years

Type of Employment	% of Working Age Population
Working for an employer full time	47%
Working for an employer part time	9%
Self-employed, employing others	3%
Self-employed, not employing others	4%
Unemployed, looking for or waiting to take up a job	3%
Retired	18%
Looking after the home	6%
In full-time education	5%
Unable to work: sickness or disability	3%
Unemployed, not looking for a job	1%

Source: 2011 Census

By way of comparison, Jersey’s International Labour Organisation (ILO) unemployment rate in March 2011 was 4.7%[27], which corresponds to 2,569 people unemployed[28]. This figure was updated in 2015 and showed a slight reduction in employment. The ILO unemployment rate between April 2014 and May 2015 was estimated to be 4%, representing 2500 unemployed people[29].

Workforce skills and qualifications

Table 11.10 sets out data on the highest level of qualification held by the working-age population of Jersey, broken down by residential status. Overall, 34% of working-age

[22] GoJ (2011) 2011 Census Chapter 2, https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Chapter2PopulationCharacteristics%2020120808%20SU.pdf
[23] Statistics Jersey (2020), https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Jersey%20Labour%20Market%20Dec%2020%2020210429%20SJ.pdf
[24] GoJ (2011) 2011 Census, Chapter 2, https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Chapter2PopulationCharacteristics%2020120808%20SU.pdf
[25] States of Jersey (2016) https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Population%20Projections%202016%2020161013%20SU.pdf

[26] i.e. 59 years for women and over 64 years for men
[27] International Labour Organisation (ILO) defines unemployed people as being: without a job, have been actively seeking work in the past four weeks and are available to start work in the next two weeks. out of work, have found a job and are waiting to start it in the next two weeks.
[28] The International Labour Organisation’s definition of unemployment rate is as follows:
The number of people aged 16 years or over who are unemployed and looking for work divided by the number of economically active people aged 16 years or over. Source: GoJ Report on the 2011 census.
[29] Statistics Jersey (2021) ‘Unemployment statistics’, https://www.gov.je/Government/JerseyInFigures/EmploymentEarnings/pages/registeredunemployment.aspx

residents have higher qualifications, including 20% at degree level or above. 20% of the workforce has no formal qualifications. Residents who are classed as licensed – those who are considered 'essential employees' – have the highest levels of qualification, with 84% having attained higher qualifications. Among this cohort, only 1% have no qualifications.

Table 11.10: Highest level of qualification (Source: Census 2011)

Level of Qualification	Total	Entitled	Licensed	Registered	Other
Higher	34%	31%	84%	31%	58%
Secondary	45%	47%	12%	41%	32%
Other	2%	1%	3%	5%	2%
None	20%	20%	1%	23%	8%

Source: Census 2011

Industry and occupation

The latest data from December 2020 show that the largest industrial sectors for employment in Jersey are financial and legal activities (22.5%), the public sector (14.2%) and education, health and other services (13.5%). The utilities and waste sector and the manufacturing sector are the smallest sectors accounting for 1.2% and 1.5% respectively. There are 5980 residents employed in the construction sector, accounting for 10.2% of total employment.[30]

Among recent arrivals, there is a higher proportion of employment in hotels, restaurants and bars, and agriculture and fishing. According to data from the 2011 census, the proportion of recent arrivals employed in financial and legal activities is smaller than the average for Jersey, but this sector still accounts for 21% of employment among this cohort.

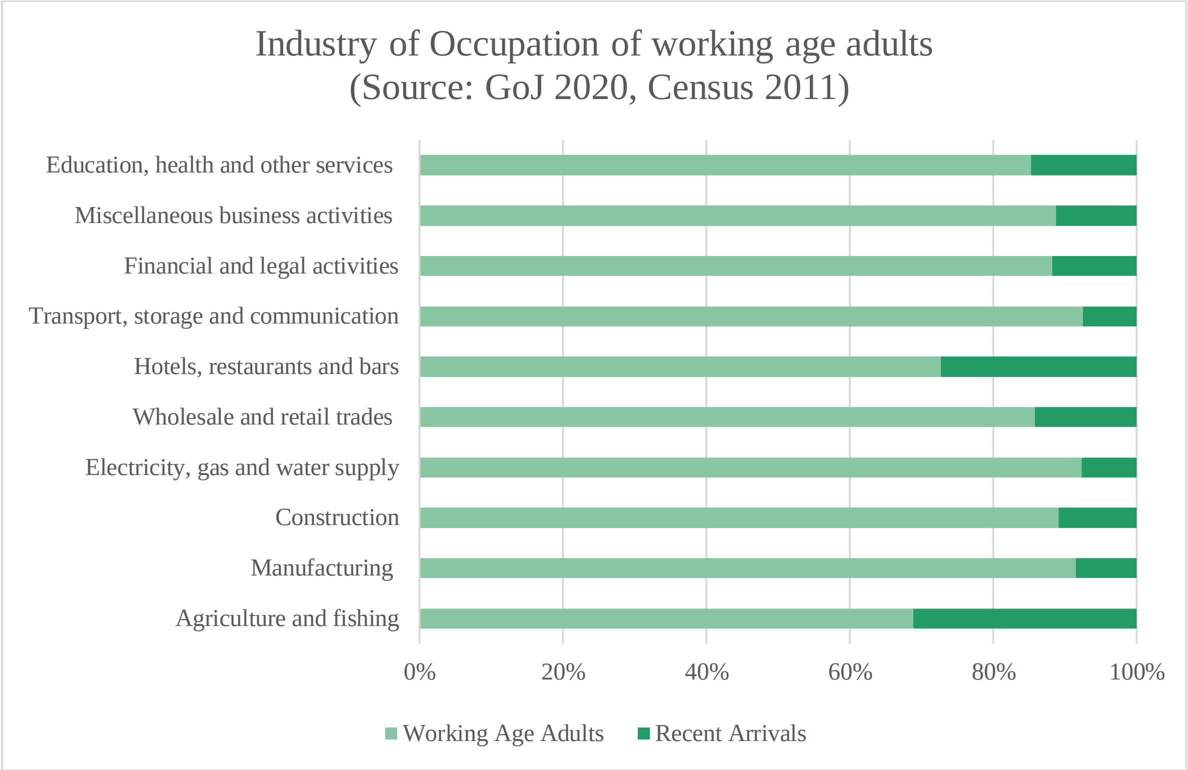

Figure 11.2 Industrial sector of working age adults (source: census 2011)

In terms of occupational profile, shows that there is a considerably larger proportion of recent arrivals working in elementary occupations[31] in comparison to the wider working population, and smaller proportions working in associate professional and technical occupations, and administrative and secretarial occupations. Whilst there is a slightly smaller proportion of recent arrivals in senior management roles, the proportion in professional occupations is slightly above the overall figure for Jersey.

[30] GoJ (2020) https://www.gov.je/Government/JerseyInFigures/EmploymentEarnings/pages/labourmarket.aspx

[31] According to the International Labour Organization, 'Elementary' occupations consist of simple and routine tasks that mainly require the use of hand-held tools and often some physical effort.

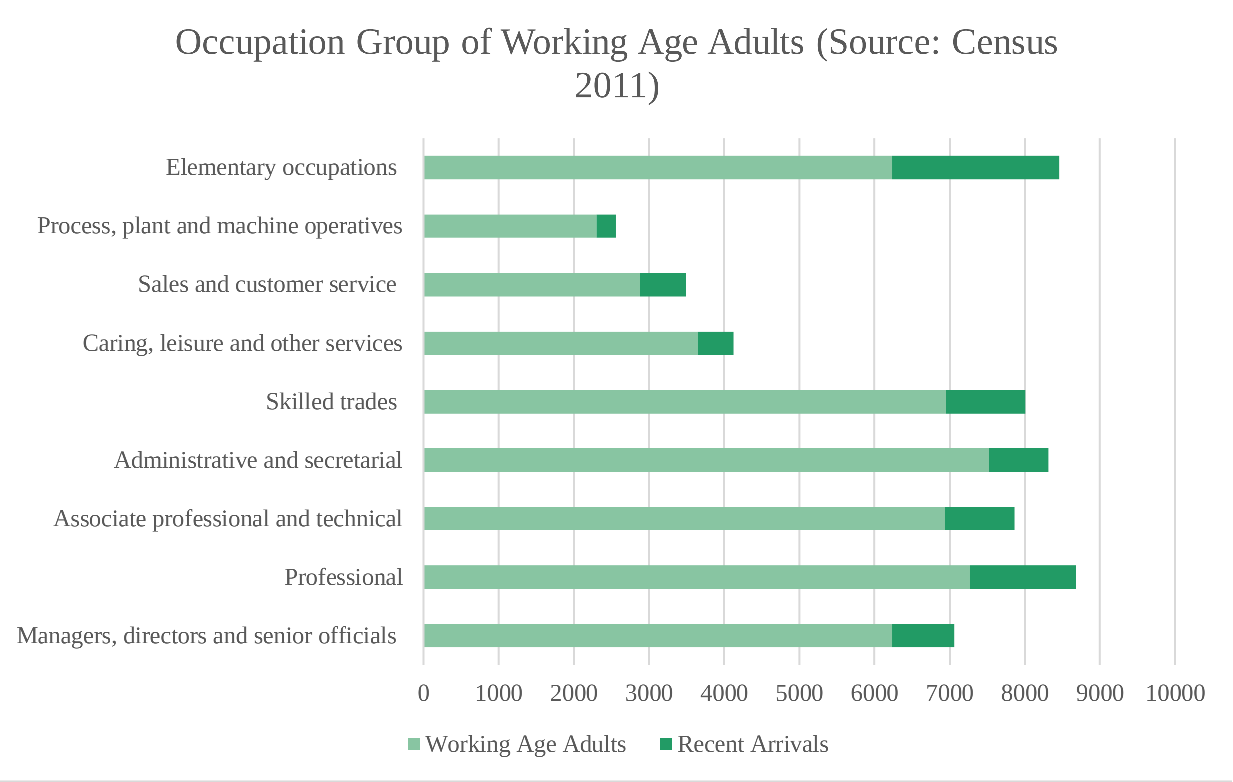

Figure 11.3 Occupation of working age adults (source: census 2011)

Earnings

The mean average weekly earnings for full time (FTE) employees in Jersey in June 2021 was £820.00 per week, the median figure was £610.00 per week.

Average earnings (per FTE) by sector ranged from approximately £500.00 per week in hotels, restaurants and bars to £1120.00 per week in financial services. This is shown on Figure 11.4[32].

In terms of change in earnings, between 2001 and 2021 earnings have remained largely flat, increasing by just 0.5% over the 20-year period. Over the year to June 2021, average earnings in the private sector were reported to have increased by 3.9%. An overall decrease in average earnings was reported in the agriculture sector (down by 1% on an annual basis) whereas the hotels, restaurants and bars sector saw the highest rate of annual increase (up by 15.7% on an annual basis). Average earnings in the public sector increased by 0.1%[33].

[32] GoJ (2021) https://www.gov.je/Government/JerseyInFigures/EmploymentEarnings/pages/earningsincomestatistics.aspx

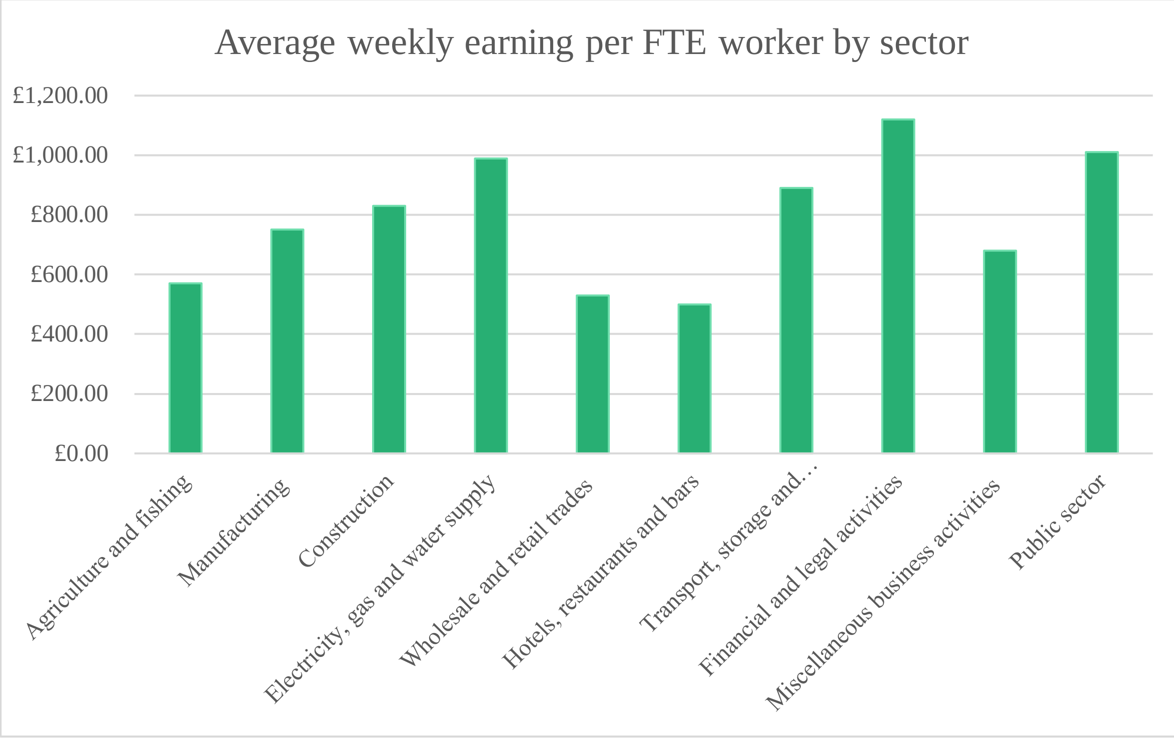

Figure 11.4 Average weekly earnings per FTE worker by sector (source: Statistics Jersey)

Well-being and Deprivation

There is no official measure of deprivation in Jersey comparable to the UK Index of Multiple Deprivation. The Better Life Index, however, provides relevant data on income, jobs and earnings.

Jersey's Better Life Index, published in 2013, provides a measure of wellbeing across 11 dimensions

- income; jobs and earnings;
- housing;
- health status;
- work-life balance;
- education and skills;
- social connections;
- civic engagement;
- environmental quality;
- personal security; and
- subjective well-being.

[33] GoJ (2021) https://www.gov.je/Government/JerseyInFigures/EmploymentEarnings/pages/earningsincomestatistics.aspx#anchor-1

These dimensions are used to compare Jersey's performance against other the Organisation for Economic Co-operation and Development (OECD) members. In overall terms, Jersey's index score of 6.6 (out of 10) ranks Jersey 19th out of 41 nations. This score places Jersey slightly above the OECD average but below the United Kingdom and France. In terms of comparative performance between materials conditions and quality of life, Jersey performs most similarly to the United Kingdom[34].

In terms of income, on a measure of disposable income, Jersey ranked 19th out of 41 countries. The average mean net adjusted disposable income per capita is $25,907[35] which is just below the OECD average of $33,604[36].

The Better Life Index also measures indicators related to 'quality of life' including work-life balance, health status, community and life satisfaction.

'Work life balance' is considered in relation to the number of hours workers in Jersey spend during a usual week. In 2017 it was found that 15% of employees in Jersey worked 50 hours or more in a usual week[37], by comparison this figure is higher than the United Kingdom (12%) and the OECD (11%).

In terms of health status, Jersey scores 9.1 out of 10. The average life expectancy is 82.6 years, which is almost two and a half years greater than the average across the OECD. People in Jersey also ranked their general health highly, 81% of adults reported that their overall health was 'good' or 'very good', which compares to an OECD average of 69%.

The 'community' indicator considers the percentage of people who 'have someone they can rely on in case of need'. In Jersey, 96% of people responded that they did, this was the second highest number of people across all OECD countries[38] with only Iceland ranking higher[39].

In terms of overall life satisfaction, people in Jersey rated this slightly higher than the OECD average, ranking 20th out of 41 when compared to the OECD nations and partners countries[40].

Housing

Table 11.11 below presents data on housing tenure in St Helier and across Jersey. Just over half of households in Jersey live in owner-occupied housing, with 14% living in housing rented from the States, a housing trust, or parish rental, and 19% living in a qualified or 'un-registered' rental. 13% live in non-qualified or 'registered' accommodation, which includes lodging houses, private lodgings, and tourist accommodation. Owner-occupation is lower in St Helier, and there are higher rates of households in all other categories.

Table 11.11: Housing Tenure (Census 2011)

Tenure	St Helier	Jersey
Owner-occupied	38%	54%
States, housing trust or parish rental	20%	14%
Qualified rental ('un-registered')	24%	19%
Staff, service or tied accommodation	19%	3%
Registered lodging house		2%
Lodger in private household		3%
Other non-qualified accommodation		6%

According to the Better Life Index 2019 report, average spending on housing in Jersey accounts for 26% of income, this figure is 6 percentage points higher than the OECD average. The Better Life Index also suggests that homes are larger than average in Jersey, reporting that each resident occupies an average of 2.1 rooms compared to a UK figure of 1.9 and an OECD figure of 1.8[41].

The Jersey Housing Affordability Index 'indicates whether a working household with average (mean) income is able to purchase a property affordably.' In 2020, overall housing affordability improved on an annual basis, although all property types saw their average house price increase and average private sector rental prices were 4% higher than in 2019.

The table below is taken from the Statistics Jersey House Price Index, Fourth Quarter 2020 report[42]. As presented in the report it shows 'the median prices of 2-, 3- and 4-bedroom houses in 2020 and the qualifying net income that would be required in order to service a mortgage "affordably" on the purchase price of each dwelling type. The 'deposit gap' represents the difference by which the median dwelling price exceeds the affordability threshold, expressed as a factor of mean net household income (£58,200).'

[34] GoJ (2019) Jersey Better Life Index Report 2019, https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20JerseyBetterLifeIndex%2020200214%20SJ.pdf, page 6
[35] To enable comparison at both the national and regional level, income and earnings values for Jersey are converted from pound sterling (GBP) to US dollars (USD) on a purchasing power parity basis and include a deflating factor of 1.20 to represent the relative cost of living between Jersey and the UK: Jersey-UK Relative Consumer Price Levels for Goods and Services, 2013; Statistics Jersey.
[36] GoJ (2019) Jersey Better Life Index Report 2019, page 3
[37] Not including time spent commuting.
[38] Joint with New Zealand.
[39] Ibid. page 4
[40] Ibid. page 5
[41] Ibid, page 3
[42] Statistics Jersey (2020) https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20House%20Price%20Index%20Q4%202020%2020210218%20SJ.pdf

Table 11.12: Housing affordability

	Median House Price	Qualifying Net Income	Additional deposit required	Deposit Gap[43] *As a factor of mean net income*
2-bed house	£536,000	£74,000	£103,000	1.8
3-bed house	£630,000	£87,000	£188,000	3.2
4-bed house	£895,000	£124,000	£427,000	7.3

Figure 11.5 shows levels of overcrowding and under-occupation by tenure. Households are classed as over-crowded if they have at least one bedroom fewer than required, while households with two or more bedrooms more than required are classed as under-occupied. Over-crowding is highest in non-qualified / registered accommodation, at 15%, and lowest in owner-occupied accommodation, at 2%. By contrast, 42% of owner-occupied households are classed as under-occupied[44].

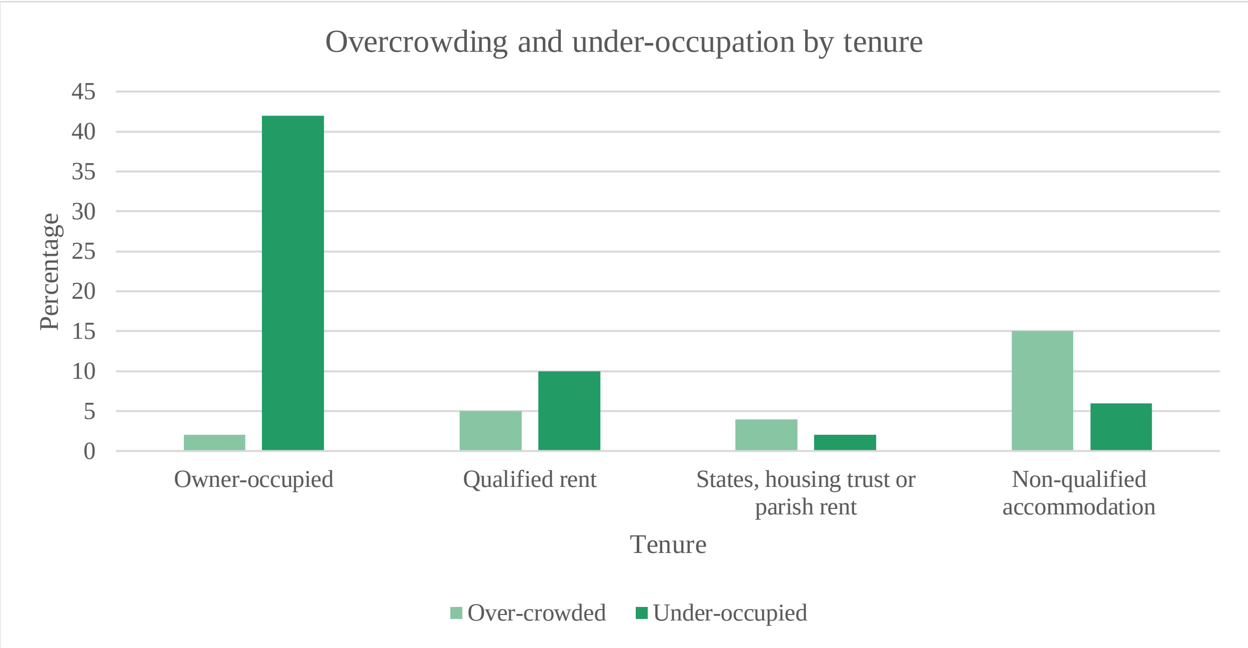

Figure 11.5 Overcrowding and under-occupation by tenure (source: 2011 Census)

At the time of the Census in 2011, there were 3,103 dwellings across Jersey identified as vacant, 7% of total housing stock (for comparison, the equivalent figure for England in 2015 was 3%). 1,397 of these dwellings were in St Helier, 8% of stock in the town. Table 11.13 provides a breakdown of the number and percent of vacant dwellings by type, and by number of bedrooms. The majority of vacant dwellings were flats, and close to 70% had one or two bedrooms. The primary reasons for dwellings being vacant were due to properties being between tenants (29%) and properties being second or holiday homes (23%)[45].

Table 11.13: Vacant dwellings by property type and number of bedrooms (Source: Census 2011)

		Number	Percentage
Property Type	House	1,141	37%
	Flat	1,944	63%
Number of Bedrooms	One	1,272	41%
	Two	869	28%
	Three	590	19%
	Four or more	372	12%

The Jersey Future Housing Needs survey estimates Jersey's housing requirement for the three years from 2019-2021, based on household's intentions surveyed in 2018.

It estimates that there will be a shortfall of 2,750 dwelling units across the three year period, including 1,830 units in the owner-occupier sector (particularly 3-bedroom properties). There is an anticipated shortfall of approximately 600 units in registered accommodation (particularly for 2-bedroom properties)[46].

Community Facilities

Jersey General Hospital is the primary healthcare facility on the island. Other hospitals on the island are Overdale Hospital and St Saviour's Hospital. There are numerous GP's surgeries and medical practices serving the island, the majority of which are located in St Helier.

Across the island, there are 22 non-fee-paying States' primary schools, as well as 2 fee-paying States' primary schools and 7 independent primary schools. There are 5 non-fee-paying States' secondary schools, 2 fee-paying States' secondary schools, and 2 private secondary schools. Highlands College is a college of further and higher education located in St Helier, comprising a sixth-form college, University College Jersey, a Business Development Centre, and adult and community education services. There are a number of sporting facilities across the Island, supporting the community.

[43] Gap between the median house price and the affordability threshold, as a factor of mean net household income.
[44] GoJ (2011) Census 2011, Chapter 4 Households and housing, https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/R%20Chapter3Households%2020120808%20SU.pdf
[45] Ibid.
[46] GoJ (2021) 'Future Housing needs' https://www.gov.je/Government/JerseyInFigures/HousingLiving/pages/housingneedssurvey.aspx

Summary of Baseline

In summary, Jersey has a population just under 100,000 people, and population estimates suggest this is increasing. The majority of the population is concentrated within the Island's capital of Saint Helier.

The baseline data presented shows that Jersey has a positive economic context in terms of GVA, which has experienced annual increases and high levels of employment. The high GVA is primarily as result of the banking and financial services sector which also employs the highest proportion of the population, followed by the public sector, and education, health and other services sector.

Tourism also remains an important economic sector for Jersey, despite trends showing long-term decline in terms of the number of visitors. Historically, tourism has placed pressure on accommodation on the Island, with hotels accounting for 73% of all bed spaces. Since 2018 however, this pressure has eased with the opening of new accommodation providers. Notwithstanding this, tourism has a knock-on effect on the housing market more generally, despite high earnings in Jersey, there is a significant 'deposit gap' between income and housing affordability, particularly for larger dwellings.

11.4 Assumed construction practices and embedded mitigation

The mitigation measures proposed during construction are set out in detail within the outline Construction Environmental Management Plan (CEMP) (Appendix A2).

The design of the proposed development has been influenced by the necessity to maintain continuous hospital service provision during the demolition and construction phase of the development. As Jersey's only primary healthcare facility, this is of crucial importance in order to provide acceptable health outcomes in the island as a whole. Notwithstanding this, there will be a period of time where hospital services are transferred to a separate site at Les Quennevais. The works for the Les Quennevais relocation have formed part of a separate planning application. The assessment instead focuses on the impact of the construction of the new hospital.

In terms of amenity effects, measures to minimise adverse impacts have also been embedded within the scheme design, for example 'blue light' access being located away from residential properties. This is discussed in more detail in other EIS chapters e.g. noise and landscape.

The design has also been developed to minimise demolition and direct effects on existing receptors.

11.5 Assessment of effects

11.5.1 Assessment of effects from construction

Local residents (tenants) / property owners: demolition of residential properties

The proposed project would require the demolition of the following residential properties:

- 1 Castle View
- 5 Castle View
- 1 Hillcrest
- 5 Hillcrest
- Thorpe Cottage (Westmount Road)
- Briez Izel (2 Westmount Road)
- L'Amyerie
- 1-3 Westmount Terrace
- Berkeley Rise (Bahia-Blanca)
- Westmount House (Orphir Villa)
- Folly Field
- Camden House (part of garden)
- Mont Martin and associated outbuildings.

The demolition would affect both property owners (those with a freehold interest) and those currently renting property to be demolished.

Given the pressures on housing in some sectors of the market established in the baseline, these receptors are considered to have a medium sensitivity to change, and the magnitude of the effect is considered to be high. This would lead to a ***major adverse*** effect, which would be significant.

In order to mitigate this potential effect properties would be purchased from the freeholder through negotiation at the market price plus a fair premium. Where properties are tenanted, displaced residents would be offered relocation assistance through an appointed agent in order to minimise the effect and ensure tenants are re-housed well in advance of demolition works.

Whilst the above measures would mitigate the impact in terms of displacement, for the purposes of the EIS, the significance would remain as ***major adverse***. This is on the basis that there is no suitable mitigation for the total loss of existing properties.

Local residents: construction traffic and amenity effects

The site is located in a relatively densely populated area of St Helier, and there is a substantial residential population, particularly to the south east of the site. The construction of OHP has the potential to result in adverse environmental impacts in relation to traffic, noise, and air quality (assessed in detail in the relevant chapters of this EIS) which could, in combination, contribute to adverse amenity effects for residents living in the immediate area surrounding the hospital.

The outline CEMP (Appendix A2) sets out measures that will be put in place to reduce the impact of demolition and construction work on local residents.

The total construction programme for OHP is planned to take place from June 2022 to November 2026. It is anticipated that across the construction programme an average of 289 construction vehicles will need to access the site each day[47]. At the peak of the demolition and construction works there is anticipated to be 390 movements per day. These increased movements could contribute to increased congestion and present a barrier to pedestrian accessibility. Careful planning and co-ordination, through a Construction Traffic Management Plan (CTMP) would help to mitigate against any potential for the build-up of congestion particularly from HGV movements into and out of the construction site.

Construction working hours would be planned to coincide with standard island working hours. This will mean that the majority of work would take place during weekdays, with evening and weekend working restricted as far as possible. Lighting would be limited to site working hours and that required for security. The site would be manned 24/7 and secured via an external hoarding. In addition, the contractor would be required to operate in accordance with the States of Jersey Health Best Practice Guide on Noise Control on Construction and Demolition Sites (2015) which includes measures to minimise the likelihood of significant disturbance (e.g. selection of plant and construction methods).

The air quality, noise and transport assessments include various mitigation proposals which are to be secured through the CEMP and / or CTMP. These measures would help alleviate potential amenity effects on local residents during the construction period.

Overall, the sensitivity of residential receptors is considered to be *low*, and the magnitude of impact is assessed to be *low*. Taking into account the findings of other assessment chapters and the various mitigation measures proposed, the effects of the construction of the proposed development on amenity for local residents are considered to be ***minor adverse effects*** and not significant.

Labour market: construction employment and training opportunities

Using the labour histogram[48] to predict main works resourcing levels it has been estimated that approximately 1,090 construction jobs[49] would be created during the construction of the main hospital. The proposed development would create employment and provide training opportunities in the Jersey construction industry over a period of approximately 5 years from Q2 2022 to Q4 2026. It is estimated that the total number of construction worker hours required to undertake the project is approximately 3,377,250. Assuming 227 working days per year, this would translate into 14,877 construction years of employment. Using the standard benchmark of 10 years of construction employment equalling one full time equivalent (FTE) construction job, the scheme would generate in the region of 1,400 gross FTE jobs.

In addition, deadweight, leakage, and displacement values have been applied to the number of construction gross jobs. Deadweight shows how much of the construction activity would have happened anyway, in the absence of the OHP project. Displacement shows the extent to which the project has led to reduced construction activity elsewhere. Considering the magnitude of the project, it has been assumed that both deadweight and displacement would be low (10%). In addition, the leakage of construction job benefits outside the local labour market is assumed to be high due to the majority of the workforce being sourced from the UK mainland. Considering the middle scenario in the off island/on island split scenarios (Table 11.4), the leakage value used is 90%. Considering the above, it is estimated that there will be 120 net FTE jobs created.

The baseline established that Jersey records a high level of economic activity, and a low rate of unemployment. The construction sector accounts for 10% of total employment, providing approximately 5,300 jobs. A peak construction workforce of 650 would equate to at least 13% of jobs within the construction sector, while the average of 395[50] number of workers throughout the main construction period would equate to approximately 7%. Given that the construction workforce will remain 395 for a period of two years, it is considered unlikely that there is the necessary capacity within Jersey to provide the total workforce for the construction of the scheme and therefore it is assumed that the majority of the construction workforce would be sourced from the UK mainland. Indeed, it is currently assumed that 80% - 100% of the construction workforce will be sourced off island, from the UK and Europe. In the absence of more specific data, Table 11.4 below includes three different scenarios of on-island and off island workforce split.

Table 11.14 Off island and on island workforce split scenarios

Off island workforce % scenario	80%	90%	100%
Off island workforce jobs (total)	872	981	1090
On island workforce jobs (total)	218	109	0
Off island workers on site at peak	556	626	695
On island workers on site at peak	139	70	0

This 'leakage' of construction jobs reduces the magnitude of impact on the local labour market in Jersey. Based on the assumption that between 80% and 100% of the construction workforce would be 'off-island', it can be estimated that the construction of the proposed OHP would create around 120 net FTE jobs that would be retained within the Jersey labour market. At peak construction, it can be estimated that there would be between 0 and 139 average daily jobs that would be retained within Jersey, with a sustained peak of between 0 and 79 over the main construction period. While the number of workers required will be lower during demolition and enabling, it may be the case that smaller enabling projects offer greater opportunity for the local construction industry.

Given the above, it is considered that the proposed development has the potential to positively affect both employment within the Jersey construction sector, and employment with the successful contractor and within the contractor country, once appointed. In terms of the local employment opportunities that would be retained within Jersey, it is considered that the on-island construction workforce is of medium sensitivity, and that the effect is of low magnitude given the proportion of off-island workers. Opportunities for employment within

[47] Based on projected trip no. data
[48] Provided by wider OHP Project Team
[49] The number represents construction jobs/ worker headcount and not FTE jobs
[50] Estimated average of the total projected resource level numbers over all time periods of the projects

the Jersey construction sector would therefore lead to a ***minor beneficial effect*** that would not be significant.

It is important to note that in addition to the above, some of the jobs will be targeted to specific areas and some benefits will be provided. 127 jobs will be created for new entrants into the construction industry which represents 10% of resources required to be delivered by new entrants to the industry. In addition, 38 apprenticeships will be created in construction roles (3% apprenticeship/traineeship opportunities to be provided), 24 placements will be provided to help people develop their skills and gain employment in the industry (2% graduate, summer placement and work experience) and 127 training opportunities will be provided for the team and the wider community (10% training/other employment and skills opportunities).

Housing: increase in demand for accommodation

As discussed above, it is assumed that the majority of the construction workforce would be sourced from outside of Jersey, predominantly from the UK mainland and Europe. There would, therefore, be a requirement for suitable accommodation for these 'off-island' workers over the course of the construction programme.

Based on current staffing estimates, the greatest sustained demand is likely between Q4 2024 and Q3 2025, when the workforce on site will be over 600 people. The minimum demand for accommodation over the construction period is likely to be between Q1 2022 and Q3 2023 when there would be less than 300 workers on site. At the peak of construction (Q2 2025) there is anticipated to be 695 workers on site. Based on the workforce profile above, at the peak of construction, the greatest demand for accommodation is likely to be between 556 and 695. The average demand for accommodation is likely to be 316 to 395.

The contractor will put in place an accommodation strategy, which will set out how accommodation of off-island workers would be managed. This would identify a range of accommodation options available for construction workers to access, and consideration will be paid to bespoke solutions through development or sourcing of their own accommodation.

Early mobilisation work for construction accommodation has been carried out by the OHP Architects. This has comprised of a preliminary mapping study on the potential capacities for each accommodation option type, with the findings as shown in Table 11.15 below.

Table 11.15: Potential Composition of off-island construction worker accommodation

Accommodation Type	Approximate Capacity
Contractor Sourced Accommodation	140
Suitable Hotel Beds (Open to long term occupancy)	470
Suitable Guest Houses	33
GoJ Owned Potential Development Accommodation	505
Private Sites	150
Total bedspaces:	**1,298**

In terms of overall accommodation capacity, and assuming off-island workers do not have any accommodation preferences, there are 1,298 bedspaces across all accommodation types. This compares favourably to provisional peak resource estimates of 695 therefore the peak construction demand of off-island workers on the Jersey accommodation market could lead to a ***minor beneficial effect*** which would not be significant. However, if accommodation types are considered individually, magnitude of effects are different.

Based on experience from comparable projects in the UK, it is assumed that the construction workforce will comprise approximately 20% 'lifetime' staff, who will be working on the project for longer periods throughout the duration of the construction period, and approximately 80% shorter-term staff, who will work on the project for particular phases of construction only. It is considered that lifetime staff may prefer to choose to rent accommodation on the island that is more suitable for medium term stays, while shorter-term staff may be more likely to choose to stay in tourist accommodation or in an accommodation village, if this should be available.

Assuming that 20% of the total off-island workforce would comprise 'lifetime' staff, it can be estimated that there could be between 174 and 218 workers who would choose to rent privately on the island for the duration of the main construction period, with smaller numbers renting privately during demolition and enabling works. Considering the approximate capacity of private sites, which is 150, sensitivity is to be medium and the magnitude of the impact in terms of the availability of private housing is also considered to be medium. Increased demand from off-island construction workers could therefore lead to a *moderate adverse effect* which would be significant.

The aforementioned accommodation strategy should mitigate against significant increased demand for private rental properties. With this in place, it is therefore considered that the magnitude of effect can be reduced to low and therefore there would be a residual ***minor adverse effect*** on the private rental market which would not be significant.

Local businesses: supply chain and procurement

OHP will be constructed using many construction materials including concrete, steel, cladding, brick, internal finishes and timber. In addition to the direct employment effects arising from the construction of the proposed development, there would be some potential for local businesses to benefit from opportunities in the technical supply chain. While local suppliers will be used wherever possible, it is anticipated that the contractor is likely to source most of the necessary raw materials and prefabricated components and machinery from the UK mainland through pre-existing supply arrangements. As a result, it is expected that the supply linkage multiplier associated with construction is likely to be considerably lower than would be expected for comparable projects on the UK mainland.

However, there may be opportunities for local businesses in certain sectors and sub-sectors of the construction industry to supply goods and services during construction. For example, materials and components sourced from the UK mainland would require storage and transportation to the construction site, creating opportunities for local hauliers or logistics firms to benefit. Processes such as concrete batching will also take place on-island and all waste will be processed by Jersey's waste management infrastructure.

The sensitivity of businesses in the local supply chain is considered to be *medium*, and the magnitude of the effect in terms of supply chain and procurement opportunities is considered to be *low*. This would therefore result in a ***minor beneficial effect*** that would *not* be significant.

There may be the potential to ensure through the construction contract that local suppliers are used wherever possible. However, it is not considered likely that this would change the magnitude of the effect.

Local businesses: induced spend by construction workforce

While the supply linkage multiplier is expected to be lower than for comparable projects on the UK mainland, it is anticipated that the income multiplier associated with local expenditure by the construction workforce could be relatively high due to the large proportion of off-island workers who would be based on the island temporarily.

According to data from 2015, visitors to Jersey spend on average £80 for every night stayed. It is assumed that construction workers would spend less per night stayed than the typical tourist visitor; however, a portion of each worker's income would be spent in the local economy on accommodation, food and drink, leisure activities and other services. The Construction Industry Joint Council: Working Rule Agreement, which covers over 500,000 workers within the UK construction industry, incorporates a subsistence (lodging) allowance of £36 per night. It is assumed that there may be some uplift on this for off-island workers based in Jersey.

Given the excess bedspace capacity discussed above, it is likely that local businesses – and tourist accommodation providers in particular – would benefit from the presence of a year-round construction workforce providing additional revenue. This would be of particular benefit during the off-peak season, when bedspace occupancy can fall below 25% across all tourist accommodation sectors. While this would be a direct benefit to accommodation providers, it is likely that there would also be benefits for other businesses in the tourist sector and more widely.

It is also anticipated that there would be sufficient capacity within the tourist accommodation sector to provide housing for the off-island construction workforce during the peak tourist season, with further potential benefits for accommodation providers and the local economy. This capacity reduces the likelihood of any dampening effect on trade in tourism-related sectors as a result of lower spend per night among construction workers than would be expected among tourists. However, there is the potential for some displacement, should there be any effect in terms of restricting the choice of accommodation available for tourists visiting the island, particularly during the peak tourist season. Displacement might indeed be significant in the worst-case scenario that during peak tourist season, tourism bedspaces meet market demand and are therefore 100% booked. It is also important to consider other potential major construction projects that will be taking place on the island simultaneously, as these can lead to further displacement.

Given the importance of businesses in the tourist sector to the Jersey economy, sensitivity is considered to be medium, and the magnitude of the effect in terms of induced spend by construction workers is also considered to be medium. This would result in a ***moderate beneficial effect*** for local businesses that would be significant.

Local businesses: loss of business premises

The construction of the proposed development requires the demolition of the existing Jersey Water building, known as Mulcaster House, located to the north of the site. As a result of this, Jersey Water would no longer be able to operate in its current location. It is understood that the building set on a 1.34 acre site[51], is Jersey Water's current headquarters and is the workplace for Jersey Water's corporate services team. The number of employees working from Mulcaster House is unknown, however Jersey Water has a total workforce of 93 employees[52]

The Jersey Water site includes one of the storage reservoirs for St Helier which would remain in situ and be unaffected by the proposed works[53].

In line with the sensitivity criteria presented in Table 11.5, Jersey Water is considered to be a business with locally significant economic and community value, providing a key service to the Island and also offering employment opportunity. However, it is also considered to be a receptor which has some capacity to accommodate changes given the nature of the facility to be demolished. Therefore, the sensitivity of this receptor has been assessed as being of *medium sensitivity*.

The magnitude of impact is considered to be *high* given that the demolition of the site would result in permanent changes to the baseline conditions for a large number of individuals.

This would result in a *major adverse* effect which would be significant.

It is understood that negotiation between the OHP Project Team and Jersey Water has resulted in the acquisition of the Jersey Water site by the Public of the Island to facilitate OHP. Plans are underway to relocate Jersey Water corporate services operations to alternative site in the centre of St Helier (New Street)[54]. It assumed that the new premises would accommodate the same number of employees and the same business functions as the existing.

In light of the above, the magnitude of the effect would be reduced to low. This would result in a residual ***minor adverse effect*** for Jersey Water that would not be significant.

[51] Gleeds (2015) Jersey Future Hospital Project Change Request No. 4, Site Options Appraisal, http://www.hwa.uk.com/site/wp-content/uploads/2017/07/POE-1-Appendix-12.pdf
[52] Jersey Water (2020) Annual Report 2020, https://www.jerseywater.je/wp-content/uploads/2020/12/76462-JW-Annual-Report-Year-Ending-September-2020_v16_WEB.pdf?x76550, page 11
[53] https://statesassembly.gov.je/assemblypropositions/2020/p.123-2020.pdf
[54] Jersey Water (2021) 'Jersey Water sells Westmount HQ and submits plans for operational hub and footpath.' https://www.jerseywater.je/jersey-water-sells-westmount-hq-and-submits-plans-for-operational-hub-and-footpath/

Local businesses: disruption to business operating within the existing hospital

There are a number of businesses that currently operate within the existing hospital buildings. These are:

- League of Friends Shop;
- Bon Sante Restaurant;
- League of Friends Café; and
- Lil's Café.

The League of Friends is a charity based in the hospital which provides services for patients, visitors and staff. Its shop and café are run by volunteers, and it does not pay rent for its space within the hospital. The Bon Sante restaurant is run by States of Jersey Health and Social Services Department (HSSD). Lil's Café is privately run.

There is also a local undertaker business that uses facilities within the hospital.

It is understood from the OHP project team, that all existing premises will be given the opportunity to relocate their businesses to the new hospital, although this is not guaranteed by contract.

On the assumption that the businesses would be relocated or offered the opportunity to relocate to OHP, and given their location within the existing and hospital, the sensitivity of these receptors is considered to be *medium* and the magnitude of the effect is considered to be *low*. This would result in a minor adverse effect for these businesses.

Working with affected businesses to minimise disruption and loss of trade could help to mitigate this effect; however, this would not change the magnitude of the effect and there would be a residual ***minor adverse effect*** that would not be significant.

Local businesses: construction traffic and disruption to access

The transport assessment considers the potential effect of construction traffic on the local highway network and includes details in relation to the primary HGV movements / routes. The increased presence of construction traffic has the potential to effect / disrupt access to local businesses.

The sensitivity of affected businesses is considered to be *medium*, and the magnitude of the effect in terms of disruption to access to these businesses is also considered to be *medium*.

The CTMP will include measures to ensure construction traffic and deliveries are controlled and managed to reduce associated traffic impacts and ensure ongoing access to businesses within the local area. With mitigation in place, it is considered that the magnitude of effect would reduce to low resulting in a residual ***minor adverse effect*** that would not be significant.

Local businesses: amenity effects

Taken in combination, the impacts of demolition and construction activity in terms of noise, air quality, and increased HGV traffic can change the environment in which businesses operate, resulting in an amenity effect. Certain businesses may be more sensitive to these effects, where reduced amenity could result in a reduction in the attractiveness of the business to potential customers.

Table 11.16 lists the businesses located within 50 metres of the proposed development that are considered to be potentially sensitive to amenity effects arising during construction. These are primarily hotels, restaurants and other food and drink serving businesses. This list doesn't include businesses which are by nature more convenience or service based with an assumption that people will continue to use those businesses in a similar way to the baseline situation.

Table 11.16: Indirectly affected business receptors within 50 metre study area[55]

Business Name	Type of Business	Sensitivity
Grand Hotel	Hotel	Low
Kensington Guest House	Guest House	Low
New Park Hotel	Hotel	Low
Tassili Restaurant	Restaurant	Low
Casa Mia	Café	Low
Café Spice	Café	Low
Wagon Wheel Café	Café	Low
Doran Courtyard Bistro	Restaurant	Low
The Shipwright Pub	Public House	Low
The Old England	Public House	Low
Alfonso Bakery and Coffee Shop	Bakery and Café	Low
1Stop Coffee Shop	Café	Low
Pizzeria Romana	Restaurant	Low
Phoenix Stores - Romanian Delight	Restaurant	Low
Alfonso's BBQ House	Restaurant	Low
Sweet Idea Cafe	Café	Low
Café Rilógio Café	Café	Low
Lotus House Chinese	Restaurant	Low
Pitcher & Le Quesne Funeral Directors	Funeral directors	Low
Savoy hotel	Hotel	Low

[55] Obtained via desk based site analysis – September 2021

Business Name	Type of Business	Sensitivity
Sarum Hotel	Hotel	Low
Little Italy	Restaurant	Low
Safford Hotel	Hotel	Low
Revere Hotel	Hotel	Low

Given the size and nature of the business receptors within the 50m study area, and proximity to the proposed development, all have been assessed to be of low sensitivity.

The CTMP will include measures to ensure construction traffic and deliveries are controlled and managed to reduce associated traffic impacts and ensure ongoing access to businesses within the local area. The CEMP includes measures which seek to control and reduce the potential air quality and noise effects within the areas surrounding the proposed development.

Taking into account the findings of other assessment chapters, the various mitigation measures proposed, and the relative distance of the receptors from the proposed development, the magnitude of effect is considered to be low which when considered against low receptor sensitivity would lead to a ***minor adverse*** amenity effect which would not be significant.

Hospital services: relocation of services

The construction of OHP will necessitate the demolition of existing building on the Overdale Hospital site.

All existing hospital services and functions are proposed to be relocated to a temporary site known as the Former Les Quennevais Secondary School. This relocation is also subject to a separate planning application submitted to GoJ on the 17th August 2021 which is currently under consideration (GoJ reference: P/2021/1139)[56].

For completeness, the potential effects of the demolition and relocation of services is considered within this assessment. In addition, the assessment also considers the potential effects on the following services which are located within the existing hospital but are not proposed for relocation to the Les Quennevais Secondary School site:

- Hard and soft facilities management services (where not required for temporary site);
- Horticultural Therapies Group;
- Assisted Reproduction Unit;
- Health and safety training room; and
- Pharmacy stores.

For those services which are to be relocated temporarily, this relocation will occur in advance of demolition in order to ensure no effect to service provision. When the OHP is complete, services will be relocated back into the new facility. The sensitivity of these services is considered to be *medium* given the ability for them to accommodate potential changes and with the planned nature of the relocation to appropriate temporary facilities, the magnitude of effect is considered to be *low*. This would lead to a ***minor adverse*** effect on services as result of being relocated to the Former Les Quennevais Secondary School which is not significant.

Community facilities: loss of community facilities

In addition to business premises the proposed project would also result in the demolition of the current Jersey Bowling Club and a small part of the People's Park would also be used to facilitate the upgrade of Westmount Road.

Jersey Bowling Club[57] is considered to be of medium sensitivity given its local community value and capacity to accommodate change. People's Park is considered to be of high sensitivity owing to the prominence of this facility and its low capacity to accommodate change.

The access route for the site requires land occupied by Jersey Bowling Club (JBC) and as such JBC would need to be demolished. Given the total loss of the JBC in this location, the magnitude of impact is considered to be *high*, coupled with the receptor's *medium* sensitivity, this would result in a *major adverse* effect which would be significant.

GoJ has been in discussion with JBC to identify alternative arrangements for this facility and a new site for the JBC has been found at Warwick Farm, approximately 2.4km north of the current location. Arrangements are being made for the relocation of the Club after the culmination of the 2022 season. It is assumed that the new site at Warwick Farm will be of an equivalent size and quality, and on this basis, it is considered that the magnitude of the effect would be reduced to *low*. This would result in a residual ***minor adverse effect*** for JBC (and therefore the availability of community facilities) that would not be significant.

The People's Park would also experience direct effects as a result of the proposed development. Specifically, a small area of the park located to the south of Westmount Road is required to facilitate works to upgrade Westmount Road. Overall, this land take is an extremely small proportion of the park and would not affect the current and ongoing use of the facility. Proposals are also being developed to improve access into the People's Park as part of the proposed development and some land currently used by the JBC would be reprovisioned back into open space / become part of the park following construction activities. The existing play area within the park will remain in the same location, although some of the equipment will need to be moved to facilitate access. As part of these works, the whole of the existing play area will be resurfaced and new facilities including benches and enhanced planting will be provided.

The proposals which affect the People's Park are therefore considered to bring some temporary adverse effects during construction, however, following construction, the improved access and reprovisioning of some former JBC land would mean overall residual effects on the park are ***negligible*** and therefore not significant.

[56] GoJ (2021) https://www.gov.je/citizen/planning/pages/PlanningApplicationDetail.aspx?s=1&r=P/2021/1139

[57] Approximately 140 members Source: https://bowlsjersey.com/jersey-bowling-club/

Community facilities: amenity effects

Taken in combination, the impacts of demolition and construction activity in terms of noise, air quality, and increased HGV traffic has the potential to impact on the amenity of users of community facilities.

As with amenity effects on businesses, the impacts of demolition and construction activity in terms of noise, air quality, and increased HGV traffic can change the environment for users of community facilities. Given that it is proposed for demolition, JBC has not been included within the assessment of amenity for community receptors.

Table 11.17 lists the community facilities located within 50 metres of the OHP site that are considered to be potentially sensitive to amenity effects arising during construction. It should be noted that sensitivity in the table below relates to the sensitivity of the users of the facilities given the indirect nature of the potential effect.

Table 11.17: Relevant Community Facilities within 50m of OHP

Community Facility	Type of Community Facility	Sensitivity
Westmount Cemetery	Cemetery	Medium
Jersey Crematorium	Crematorium	Medium
Westmount Day Nursey	Nursery	Low
West Park	Park/Open Space	Medium
The People's Park	Park/Open Space	Medium
Westmount Jewish Cemetery	Cemetery	Medium

The CTMP will include measures to ensure construction traffic and deliveries are controlled and managed to reduce associated traffic impacts and ensure ongoing access to community facilities within the local area. The CEMP includes measures which seek to control and reduce the potential air quality and noise effects within the areas surrounding the proposed development.

Taking into account the findings of other assessment chapters and the various mitigation measures proposed the magnitude of effect is considered to be *low* which when considered against *low or medium* receptor sensitivity would lead to a ***minor adverse*** amenity effects which are not significant.

It is understood that, given their proximity to the scheme, Jersey crematorium is in early discussions in relation to potentially relocating. If the facility were to decide to relocate, the OHP project team would work proactively with the crematorium to support this relocation wherever possible, recognising the potential effects, particularly during the construction period. Notwithstanding this support, the assessment considers that with the implementation of mitigation (as per the above), the crematorium could continue to operate during construction and operation of the proposed development. Any effects arising from potential relocation have therefore not been considered as part of this assessment.

Agricultural land

The development of the OHP site will also result in the loss of 2.1ha of agricultural land, and this loss would be permanent. This has been included as part of the assessment of effects for construction, on the basis that the loss would be incurred at construction stage.

The impact of the proposed development on agricultural land quality and soils is assessed in Chapter 8, Ground Conditions. This assessment focuses only on the potential effects to agricultural land from a business perspective and as such focuses on the impact of the loss of agricultural land to the existing farm holding.

The agricultural land is currently tenanted by the Jersey Royal Company. Consultation with the GoJ Infrastructure, Housing & Environment department, has confirmed that in total Jersey Royal Company farm approximately 1500ha across the Island. As a result, the land take required for OHP represents 0.14% of their total landholding.

Whilst the sensitivity of the receptor is considered to be *medium*, the magnitude of impact is considered to be *low* and it is assumed the loss of land will not have a significant impact on the Company's ability to operate.

Overall, it is considered that there would be a ***minor adverse effect*** on agricultural land which would not be significant.

11.5.2 Assessment of effects from operation

Local businesses: opportunities for new food/retail outlets in the new development

The new hospital will provide new commercial space. Core retail floorspace provided as part of the proposed development would comprise 3 no. units. This includes 2 no. units measuring approximately 70m^2 in total area and 1 no. measuring approximately 65m^2. This will allow for retail/concession and food and beverage outlets within the hospital and its curtilage.

Based on an employment density per m^2 of 15-20 (i.e. 1 employee per 15-20 square metres), this new floorspace could sustain or create between 10 and 14 FTE jobs within the retail or food and beverage sectors. However, this figure includes replacement or re-provided floorspace for businesses that currently exist within Jersey General Hospital, including those discussed above, and so the total floorspace and employment figure cannot be considered 'additional', i.e. an increase on the existing situation.

In addition to this core retail space, it is understood that there will be a hospital restaurant totalling approximately 360m^2 however this is not counted as retail space. Based on this figure, the restaurant could sustain or create between 18 and 24 FTE jobs. As set out above it is currently unknown as to whether the current hospital restaurant by States of Jersey Health and Social Services Department (HSSD) will re-locate to the new hospital on a 'like for like' basis, and as such it not known whether these employment figures would be considered as 'additional' i.e. an increase on the existing situation.

It is not known how many people are currently employed by businesses within the existing Jersey General Hospital. However, it can be assumed that there will be some beneficial effect in terms of sustaining existing jobs as well as providing additional opportunities for businesses and employment. The floorspace will also be modern and offer improved space within which businesses will operate.

The sensitivity of the businesses that could be affected is considered to be *medium* based on the overall employment provision, and the magnitude of the impact is considered to be *low*. This reflects the fact that some of the jobs within the future hospital are likely to be relocated from the existing Jersey General Hospital. This would result in a ***minor beneficial effect***, which would not be significant.

Labour market: staff requirement in new hospital

Health care services (HCS) is a significant employer on the island, with a workforce of approximately 2,900 FTE. It is anticipated that staffing numbers within OHP will not be substantially different to existing staffing levels across the various medical services and whilst it has not been possible to obtain accurate numbers, Table 11.18 provides an estimated number of staff that will be required[58]:

Table 11.18 Estimated staffing numbers for OHP based on existing provision in Jersey general hospital and Overdale hospital

Staff type	Number
Allied health professionals	424
Doctors and consultants	184
Healthcare assistants	613
Non-clinical support staff	371
Nurses	756
Other (civil servants)	520
Total	**2,868**

Due to the anticipated staff requirement for OHP being similar to the existing requirement, a ***neutral effect*** is predicted which would not be significant.

Community Facilities: Hospital Services

The new hospital would provide modern accommodation and facilities for the Jersey population and provide additional hospital floorspace to meet forecast increases in patient numbers, totalling approximately 983m^2.

The hospital is considered to be of high sensitivity given its value to the community of Jersey. The creation of a new, modern facility is considered to be of medium magnitude, leading to a ***major beneficial*** effect which would be significant.

[58] Figures obtained from consultation with GoJ (November 2021)

Health impacts associated with the construction and operation of the hospital are considered in more detail in the Health Assessment, provided in Chapter 12 of this EIS.

11.5.3 Potential impacts due to Climate Change

In terms of future climate changes, there are a range of in-combination effects related to climate change that have been considered including raised temperatures, increased rainfall and storm events. These are likely to result in people changing their behaviour such as spending more time outdoors or sleeping in their homes with windows open during warmer periods. Alternatively, during wetter or stormier periods, people may choose not to spend as much time outdoors enjoying green and open spaces than they otherwise would. These behavioural variations would also reflect on the frequency with which people may choose to visit social gathering places such as sports facilities.

It is considered that while the impacts of climate change are likely to affect socio-economic receptors in general terms, no significant in-combination effects with the scheme have been identified and no mitigation is proposed.

11.6 Mitigation and enhancement

The assessment of effects in the above sections includes consideration of proposed mitigation. This section provides a summary of the main mitigation measures identified for both the construction and operational phases. These measures include both actions to mitigate negative effects as well as actions to facilitate and enhance positive effects from the proposed development.

11.6.1 Mitigation of effects from construction

Mitigation measures proposed during the construction phase include:

- Local residents – Purchase of property at market rate plus a premium in order to compensate property owners.
- Local businesses – Relocation of existing business operations to suitable alternative locations.
- Amenity effects on local residents' businesses and community facilities– Application of best practice construction management measures as described in the outline CEMP and CTMP.
- Community facilities – Relocation/reprovisioning of the JBC whose current facility would be lost as part of the proposed development.
- Construction employment – Local sourcing and training of construction staff focused on areas and skills which are required on-island, ensuring longevity in the benefits to Jersey.

- Housing market – Implementation of an accommodation strategy for those (non-Island) employed during the construction phases.
- Agricultural land – Compensation for land acquisition.

11.6.2 Mitigation of effects from operation

There is no mitigation proposed during the operational phase given the beneficial effects reported through this phase of the proposed development.

11.7 Residual effects

Residual effects have been discussed within the Assessment of Effects sections of this chapter and are summarised within the Assessment Summary Matrix below (Table 11.19).

11.8 Assessment summary matrix

Table 11.19 provides an assessment summary of the socio-economic assessment, listing all socio-economic effects identified for the construction and operational phases of the proposed development. Significance of effect is identified prior to, and following mitigation (residual effects). Where no mitigation has been identified (as not required), the level of significance remains the same.

Table 11.19 Assessment summary

Potential Effect	Receptor (s)	Sensitivity of Receptor	Magnitude (prior to mitigation)	Significance (prior to mitigation)	Mitigation	Magnitude (following mitigation)	Significance (following mitigation)	Comments
Construction Effects								
Loss of residential properties through demolition	Local residents (tenants) / property owners	Medium	High	Major Adverse	Properties to be purchased at market price plus a fair premium.	High	**Major Adverse**	No mitigation which can reduce the impact but would compensate property owners.
Amenity effects from construction activities	Local residents	Low	Low	Minor Adverse	Measures within CEMP / CTMP	Low	Minor Adverse	Mitigation would help manage potential effects
Construction employment and training opportunities	Local workforce	Medium	Low	Minor Beneficial	N/A	N/A	N/A	Assessment reflects the probable on-island construction opportunities
Increased demand for accommodation bedspaces	Accommodation market	Medium	Low	Minor Beneficial	N/A	N/A	N/A	
Increased demand for local private housing	Private housing market	Medium	Medium	Moderate Adverse	Accommodation Strategy	Low	Minor Adverse	
Supply chain and procurement opportunities	Local Businesses	Medium	Low	Minor Beneficial	Use of local supply chain where possible	Low	Minor Beneficial	
Induced spend by construction workforce	Local Businesses	Medium	Medium	Moderate Beneficial	N/A	N/A	N/A	
Loss of business premises – Jersey Water	Local Businesses	Medium	High	Major Adverse	Support to relocate Jersey Water	Low	Minor Adverse	
Disruption to businesses within the current hospital	Local Businesses	Medium	Low	Minor Adverse	Opportunity to relocate to the new hospital	Low	Minor Adverse	
Business access	Local Businesses	Medium	Medium	Moderate Adverse	Mitigation through the CTMP to ensure continued access	Low	Minor Adverse	
Amenity effects from construction activities	Local Businesses	Low	Low	Minor Adverse	Measures in CEMP / CTMP	N/A	N/A	Measures would help manage potential effects

Potential Effect	**Receptor (s)**	**Sensitivity of Receptor**	**Magnitude (prior to mitigation)**	**Significance (prior to mitigation)**	**Mitigation**	**Magnitude (following mitigation)**	**Significance (following mitigation)**	**Comments**
Relocation of existing services	Hospital Services	Medium	Low	Minor Adverse	Alternative temporary premises have been identified	N/A	N/A	
Loss of JBC	Community Facilities	Medium	High	Major Adverse	Alternative site for relocation to be identified	Low	Minor Adverse	
Impact on People's Park	Community Facilities	High	Negligible	Negligible	N/A	N/A	N/A	
Amenity effects from construction activities	Community Facilities	Low / Medium	Low	Minor Adverse	Measures in CEMP / CTMP	N/A	N/A	Measures would help manage potential effects
Loss of agricultural land	Agricultural Land	Medium	Low	Minor Adverse	N/A	N/A	N/A	
Operation								
Opportunity for businesses within the OHP	Local Businesses	Medium	Low	Minor Beneficial	N/A	N/A	N/A	
Staff Requirement in the new hospital	Labour Market	Medium	Low	Minor Beneficial	N/A	N/A	N/A	
New hospital facilities	Community Facilities	High	Medium	Major Beneficial	N/A	N/A	**Major Beneficial**	