Guernsey Tomorrow

STAGE 1:
IDENTIFICATION OF KEY ISSUES

CONSULTATION DRAFT

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POLICY COUNCIL
THE STATES OF GUERNSEY

CONTENTS

INTRODUCTION

Twenty years ago, following an economic appraisal of Guernsey, a revised physical planning strategy was introduced for the island. The strategy sought to reinforce the distinction between town and country by concentrating development in the main urban areas and protecting what remained of the rural environment.

The objectives of the current strategy have been largely achieved. We are accommodating close to 100% of our development requirements on brownfield sites and most of the major new development is concentrated in the Urban Area. Concern has been expressed, however, about the impact the strategy is having on the environment and quality of life in the urban area.

The 2006 Policy and Resource Plan (Billet d'État XXI, 2005) stated that:

"The SLPG recognises that further research is now needed to establish whether the Urban Plan area can continue to accommodate the majority of new development over the medium to long-term. This research will involve what are called 'capacity studies' and not just in relation to housing (where the Housing Target Area reserves remain largely unused) but also in terms of industrial/business land.

These capacity studies will also need to take place within a context that ensures that the quality of the living environment in the urban area is maintained – its sustainability in other words. This will include an evaluation of the likely circulation and traffic impacts of further development".

This raises a number of important questions:

Is there space to accommodate the Island's major development requirements in the urban area in the medium to long term?

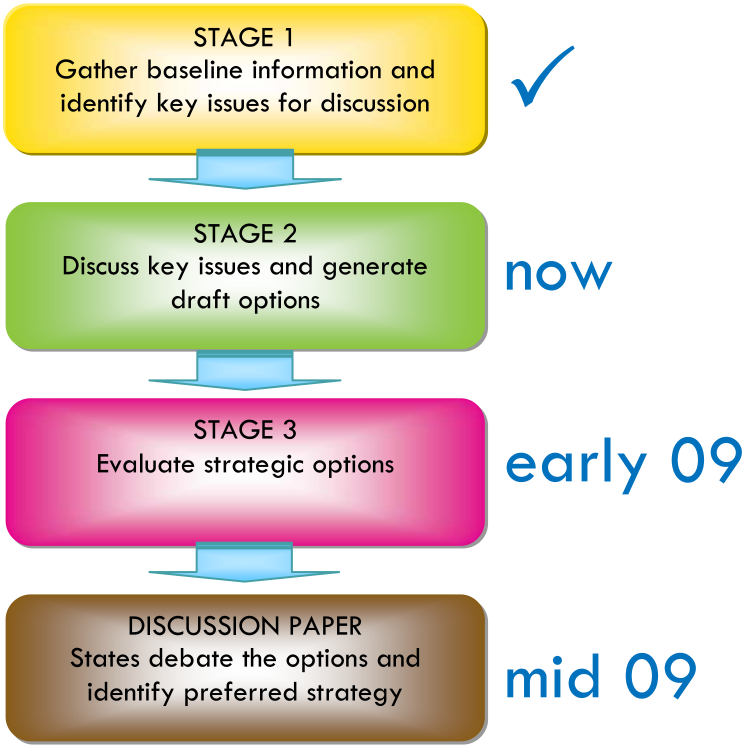
Is there a point at which increases in activity or changes in the physical environment are likely to severely detract from the quality of life in the urban area?

How can the island absorb the pressures for development and change without fundamentally harming the character and quality of the physical environment?

As always with planning it is a matter of identifying the issues, weighing up the options and agreeing a balanced response based on evidence. The *'Guernsey Tomorrow'* project (see Figure 1 on next page) puts emphasises on an inclusive process that engages with the public and lets them have their say about what Guernsey should be like in 2025.

'*Guernsey Tomorrow'* will set the framework for the revised Strategic Land Use Plan (SLUP), which in turn will inform the review of the Urban and Rural Area Plans. It will proceed in parallel with and be inter-linked with the development of scenarios for the Eastern Seaboard.

Figure 1: The 'Guernsey Tomorrow' project has three stages.

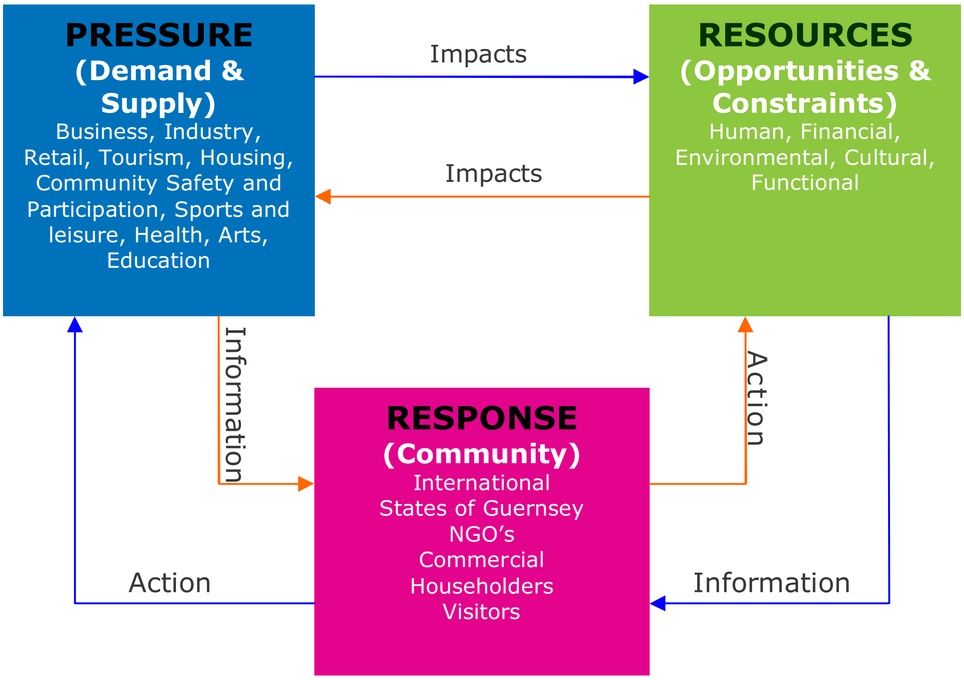


This paper forms part of **STAGE 1:** INFORMATION & ISSUES.

The first step in the assessment process has been gathering baseline information and identifying any gaps in knowledge. *Baseline Data and Characteristics of Guernsey,* presents a portrait of Guernsey in relation to the key themes of the Government Business Plan and shows how the island is changing. It draws upon a wide range of sources (e.g. YBG's Business Trends Survey, TNS's Annual Visitor Survey, and Townsend Centre's Survey of Living Standards) and complements the Sustainable Guernsey Reports. The baseline study is a 'living' document and forms the basis for on-going information gathering and data assembly.

Step 2 of the process has been to begin focusing on the key spatial planning issues, problems and opportunities that will need to be addressed in the next 20 years or so. This part of the assessment process follows the *'Pressure – Resource – Response'* model (see Figure 2 on next page).

Figure 2: 'Pressure – Resources – Response' model.



PART 1: PRESSURE (DEMAND AND SUPPLY) addresses the main driving forces for development and change in the island and considers whether there is sufficient development, of the right type and quality, in the right location.

PART 2: RESOURCES (OPPORTUNITIES AND CONTRAINTS) addresses the state of the island and the environmental, economic and social conditions that will influence its future. It considers what are the islands principal assets and to what extent do they act as opportunities or constraints for change.

The purpose of the paper is to enable decision makers and other interested parties to assess whether the right issues have been identified and comment on whether there is evidence of other issues that we have overlooked.

STAGE 2: CONSULTATION & RESPONSES.

The paper produced from stage 1 will inform discussion in stage 2. When you read through this document, we would like to know:

- **Are we covering the right kinds of issues?**
- **Which issues are of most concern to you?**
- **Are there any other important issues that you feel we have overlooked?**

PART 1: PRESSURE (DEMAND AND SUPPLY)

1 BUSINESS

1.1 Financial and business services

GENERAL SITUATION

In order to sustain a robust and diverse economy, the States of Guernsey remains committed to attracting and retaining international financial services business, as well as other high value added business which will contribute to the Island's overall economy. The financial services industry is made up of a number of complementary specialist sectors, and is a major exporter.

KEY FACTS

- In Guernsey, the financial services industry accounts for almost 44% of GVA by economic sector compared with more than 50% in Jersey.

- The number of banks reached a high peak of 79 in the late 1990's and there are now around 50 banks licensed in the island, compared with 45 in Jersey.

- An estimated 60% to 70% of export earnings is derived from the financial services industry.

- At the end of March 2008, bank deposits stood at a new record high of £129bn, an increase of 23% on the same point in 2007. Funds administered in Guernsey stood at £150bn in March 2008, an increase of 30% on 2007.

- In 2008 (March) the financial and business services sectors employed a combined workforce of 9,580 employees compared with 9,151 in 2007.

- The financial and business services sectors occupy approximately 1.8 million square feet (gross floor area) of office accommodation.

- The office employment density is approximately 190 square feet gross internal floor area per workspace compared with typical employment densities of 205 square feet for general purpose built offices and 215 square feet for City of London office accommodation.

- In 2007, there was approximately 140,000 square feet of office accommodation available to let compared with approximately 200,000 square feet in 2006.

- Prime office rents are generally in excess of £30psf with rents for prime new build accommodation escalating above £40psf (rents for prime new build accommodation in Jersey are £28 - £29psf).

See Key Issues 1.1.1 – 1.1.4

KEY ISSUES

1.1.1 New office accommodation

The offshore financial and legal services sector has been characterised by mergers and growth. As a result, some firms are operating from multiple sites prompting demand for, and the rapid take-up of, modern large floor-plan accommodation. The Mixed Use Redevelopment Areas (MURAs) of Glategny Esplanade and Le Bouet were designated to meet the anticipated demand for modern purpose-built offices in St Peter Port. Approximately ½ million square feet of accommodation has been provided since 2002, mostly within the two MURAs despite the number of employees in this sector remaining fairly static. It seems as though two factors can explain this apparent anomaly: some vacant accommodation has been retained for disaster recovery purposes; and some businesses, considering recruitment issues and the need to cater for a full range of business needs (e.g. training) on island, have sought to match employment densities typical of headquarters accommodation (i.e. 240 square feet GFA per workspace). The industry has predicted that there is a future requirement for two additional large floor plan office buildings of approximately 50,000 square feet each.

Key Issue 1.1.1

If additional large floor plate office accommodation is required, how can it be accommodated?

1.1.2 Need to replace older office stock

The majority of new office accommodation is let to businesses already located in Guernsey rather than to companies wishing to relocate here from elsewhere. As a result, the older and often smaller buildings previously occupied by these firms are released back to the market. This has created 'headroom' allowing smaller firms to trade-up to better quality space**.** As a result only the lowest quality space has been left. Some of the poorest office stock is obsolete and redundant and may need to be replaced altogether. In addition, some of the intermediate stock fails to meet the modern standards expected by the industry, but has the potential to be redeveloped for large floor-plan accommodation.

Key Issue 1.1.2a

How can we make the best use of difficult to let, poor quality or obsolete office space?

Key Issue 1.1.2b

How can the redevelopment of secondary/intermediate accommodation be encouraged?

1.1.3 Clustering

One of Guernsey's strength lies in clusters of interrelated commercial activity and the inter-dependence of various sectors. Examples include the relationship between financial service companies and the legal and accounting professions, or the developing cluster of brand marketing operations. The existence of strong financial, legal and accounting services provide an attraction for new businesses in other sectors which require services to international standards such as branding, franchising and e-business. Location can be important to the legal sector, which is often reluctant to stray far from its customary centres for justice and legal administration.

Key Issue 1.1.3

If location is important for certain business clusters, are there realistic opportunities to accommodate 'centres of excellence'?

1.1.4 Design quality, space standards and user satisfaction

The design and visual impact of some of the largest new office buildings has been heavily criticised by some sections of the community. On the other hand, some have received almost universal approval or have been singled out for special accolades by professional judges and commentators. Nonetheless, the public perception of these buildings rarely reflects the views of the users or the economic returns. External pressures such as rising energy costs and internal factors such as environmental management and audit of building performance mean that issues such as the high energy use of air conditioning and minimising solar gain in the summer months will become increasingly important factors.

Key Issue 1.1.4

How can we ensure that major new office buildings are designed to be locally distinctive, commercially successful, and responsive to the conditions for office work in the 21st Century; and also address sustainability considerations, including natural lighting and ventilation, energy performance and the avoidance of materials involving high energy use and pollution in their manufacture?

1.2 Retail

GENERAL SITUATION

Town and The Bridge offer attractive shopping environments, although Town has also undergone a subtle shift in function, away from being the Island's main food shopping destination to being an area of employment with associated 'leisure' shopping, eating and drinking. The recent Markets redevelopment would seem to indicate that there is capacity within the local economy to promote new retail development in Town. Furthermore, the current level of interest to develop the Leale's Yard MURA as a predominantly retail destination reinforces the notion that market confidence within the retail sector is strong.

KEY FACTS

- Retail is the third largest employment sector with 3,535 employees (11%) of the workforce (March 2008) compared with 3,844 (12%) in 2007.
- Guernsey has a comparison goods market potential of £151.4 million per annum, rising to £246.4m including Convenience and Catering categories (based upon spend data held at household level, multiplied by the number of households).
- The clothing & footwear market is worth about £35m annually.
- Visitors spend over £20million annually on eating out and over £8million per annum on clothing.
- Within St Peter Port there is estimated to be a total of 300,000 ft^2 net sales area, of which the clothing and accessories category accounts for about a third.
- The space within department stores in St Peter Port makes up nearly 21% of the total whilst multiples accounts for just over 29%.
- Independent retailers make up almost half of the total retail provision in the island. In the clothing and footwear category, independents account for just less than a third of overall retail space and within this there is a mix of both upscale and lower-end fashion brands.
- St Peter Port is dominated by mass market clothing units (e.g. Next, M&S, Principles) accounting for 71.4% of the fascias and 84.7% of the clothing space within the town.
- Internet sales in Guernsey as a percentage of overall sales are greater than in Jersey which, in turn, are higher than the UK. In terms of value, online sales in Guernsey are estimated to be £75million.
- Following the Leale's Yard development retail provision will significantly increase on the island – new retail floor space is likely to total in the region of 150,000 ft^2 to 200,000 ft^2 net sales area.
- The density of petrol filling stations is higher than in Jersey and over three and one-third times the average for the UK.

See Key Issues 1.2.1 – 1.2.5

KEY ISSUES

1.2.1 The on-island retail offer and consumer choice

Although there are a reasonable number of units within St Peter Port, the retailers trade from small, un-conforming footprints and are unable to offer customers a strong offer as a result. The new Market Development provides better units from which to trade, but generally the Town's topography, historic environment and sea-front location, mean that opportunities for new large floor-plate retail premises are very restricted.

The Mill Street/Mansell Street area has established itself as something of a niche shopping destination for furniture and antiques and has traditionally offered relatively low cost incubator space for new independent retailers to set up. Some successful businesses (in-Step, Nautilus, Indica) have been able to migrate into more prime retail frontages. While a small amount of vacant shop units allows for this evolution in the retail sector, too many vacant units may detract from the character of the town and its attractiveness as a shopping destination.

Two new superstores (B&Q and Checkers) have been developed at Admiral Park, replacing their previously outmoded and non-conforming premises. The former B&Q store is now a wine and beer merchants. A new showroom has also been developed for GuernseyGas/Euronics replacing the old sales area in Sydney Vane House. Plans for a further retail court comprising 5 stores ranging in size from 15,000 square feet to 6,000 square feet have been approved and, if completed, would mean that the overall net sales area at Admiral Park would be approximately 150,000 square feet in total.

In addition, the Leale's Yard MURA makes provision for a significant quantity of new retail floorspace and site characteristics make it possible to accommodate large floor-plate outlets that are unable to locate in Town. This is likely to create a retail choice distinctly different to Town, presenting it with competition that cannot be accurately gauged at present. Currently, there is no research available regarding demand for new large retail outlets.

The development of the Grande Marche Co-Op store and the M&S Simply Food store, together with the addition of a number of new smaller independent outlets has seen St Martin's 'village' consolidate its position as the island's third largest shopping destination. Other rural centres have similar potential to offer convenient local amenities and reduce the need to travel.

There is an over provision of petrol forecourts in Guernsey and a number of out-of-town car showrooms have become redundant following the acquisition and merger of several vehicle franchises. Cumulatively, the reuse of these premises for general retail could impact upon the viability of the established urban and rural centres. Similarly, the pressure to permit garden centres on out of town sites could have significant impacts on the retail provision within the Island if it is not adequately categorised and regulated.

Key Issue 1.2.1a

If there is a need to extend the retail offer, how can additional retail development be accommodated?

Key Issue 1.2.1b

Is it important to protect the retail function of Town, The Bridge and/or the rural centres; and, if so how might their attractiveness as shopping centres be enhanced?

1.2.2 Clone Town or Home Town?

St Peter Port remains a vibrant and attractive shopping destination, with picturesque streets, harbour setting and a healthy range of shops. However, despite having an affluent population on the island, there are few upscale retailers. Islanders are currently travelling elsewhere, or shopping on the Internet to acquire some of the more luxury and contemporary brands.

St Peter Port has seen a creeping change from having a substantial proportion of independent shops to a more significant number of multi-national retail outlets. High street chain stores can apply considerable resources and marketing know-how to assist with town centre management and improvements, but the shift away from independent retailers could impact negatively on the island’s character.

The lack of attention to improving paving, street furniture, lighting and the quality of the public environment in general may be contributing to worrying signs of neglect in the appearance of Town and the Bridge. However, some individual environmental enhancement projects have come forward, most recently through the Town Centre Partnership at North Plantation.

Key Issue 1.2.2a

How can the local distinctiveness of our shopping areas be maintained & strengthened?

Key Issue 1.2.2b

What can be done to promote further enhancement schemes within Town & the Bridge?

1.2.3 The evening economy

The Town of St Peter Port is the focal point for entertainment in the island. After 5:30pm the Town and the Bridge undergo a significant change of character with restaurants, bars and takeaways being the predominant trading businesses. Thousands of people are encouraged to socialise in Town at night, particularly at the weekends, and the vast majority do so safely - enjoying the ambience of the area. Inevitably there can be some degree of over indulgence and boisterousness, which can make Town less appealing to groups such as families and the elderly during the evenings. Groups of revellers congregating together can be intimidating for others, especially women, and can create apprehension amongst passengers waiting for taxis or buses or for people waiting to use ATMs.

Key Issue 1.2.3a

How can we ensure that the Town is an inclusive and sociable venue in the evenings?

Key Issue 1.2.3b

What can be done to improve town centre safety and address the fear of crime, especially after dark?

1.2.4 Accessing the retail areas (See also Part 2 section 4.5: accessibility)

Good customer accessibility – in terms of being able to get into town, get what you want and get out again – is vital for the long term prosperity of retailers. Importantly, whichever way people get to Town, the main purpose of their trip – shopping, meeting friends, sightseeing – is completed on foot, yet all too often road traffic and parking dominate the public spaces, quays and piers.

The configuration of the Town and its historic environment means that the prospect of retailers ever being able to offer their customers the same levels of convenient car parking as their out of town rivals remains highly improbable. Nonetheless, in terms of overall accessibility, Town scores much higher than other destinations. The introduction of a public transport strategy has lowered the cost of bus travel and increased passenger numbers. Town is at the hub of an increasingly popular bus service that provides frequent services to all parts of the island. It is also the focus of the island's taxi services. Moreover, more than ¼ of the island's population live within just a short walk from the centre and about ½ of the island's working population is employed in and around the Town. St Peter Port is also the landing point for cruise ship passengers, sea passengers arriving by ferry and visiting pleasure craft.

Key Issue 1.2.4

What can be done to improve accessibility for local and visiting shoppers?

1.3 *Industry*

GENERAL SITUATION

There are a significant number of high-profile manufacturing and exported goods and service industries based on the Island covering a very broad spectrum of activities.

KEY FACTS

- The number of employees in the manufacturing sector has declined from almost 7% of the workforce in 1996 to less than 4% in 2008. The largest contributing sector was Rubber & Plastics (254 employees) and the smallest was Textiles (30 employees).

- In the CGi's 2007 Members Survey, 45% of respondents said that the quality of life attracted them to locate in Guernsey. 75% of the respondents had been in the island for over 10 years. 62% of respondents class their main markets as being in the Channel Islands with 31% being UK and just 1% being Europe. Companies selected the major challenges facing business as shortage of labour (55%), the cost of labour (45%), increased competition outside the island (28%), the cost of premises (28%) the cost and availability of transport links (28%) and the use and availability of land (24%).

- Several new industrial developments have taken place notably at Envoy House, Pitronnerie (Healthspan), Les Caches (Burbridges), Guernsey Press and St George's Complex. Other schemes in the pipeline include Pitronnerie Road, La Villiaze (Phase 2) and La Hure Mare (coalyard).

- A business survey in 2005 identified a requirement for 5 hectares (31 vergees) of additional business premises (excluding financial services). The predominant requirement was for retail warehousing and open storage.

- The Key Industrial Area at Saltpans will provide almost 6.5 hectares (40 vergees) of additional industrial development land. In addition, an assessment of the scope for industrial development in the Urban Area has identified potential sites amounting to approximately 8 hectares (49 vergees), most of which will involve recycling under used commercial sites.

- In 2007 the construction sector employed 9.4% of the workforce following a period of growth in the early part of the decade.

See Key Issues 1.3.1 – 1.3.2

KEY ISSUES

1.3.1 Availability of appropriate land & accommodation

Changes in the local economy over the last thirty years, together with technological advances have led to a marked shift in the format of industrial business premises, usually with a contraction of workspace requirements for traditional manufacturing uses. This trend can be advantageous because of the opportunities to increase the efficiency of businesses and to release surplus land. However, it may also lead in some cases to displacement of established industries which will then require alternative sites.

A study of potential industrial sites in the urban area was undertaken in 2006. It indicated considerable scope for new industrial premises, primarily through the rationalisation and redevelopment of sites. However, availability is not just a matter of identifying opportunities for development, a combination of many factors will influence whether the land is effectively available on the market. Such factors include market demand, quality of existing employment sites, ownership, land values and rents, market readiness and site constraints.

A joint exercise between the Commerce and Employment Department and the Environment Department has revealed a requirement to identify specific opportunities for the provision of open storage yards and small workshops to meet current need and to accommodate businesses that may be displaced in the future. The provision of temporary land and accommodation has been made at the Belgrave Vinery Housing Target Area. However, whilst this might satisfy an immediate demand, a longer term solution is being actively pursued to accommodate these types of business.

Key Issue 1.3.1a

What are the main barriers to the take-up and development of potential opportunities for the provision of industrial land and accommodation?

Key Issue 1.3.1b

How can the inhibitions/inefficiencies in the rationalization and redevelopment of suitable industrial sites be overcome?

Key Issue 1.3.1c

If there is a need to accommodate major new industrial/business premises, how can this be addressed?

Key Issue 1.3.1d

What is the best strategy for accommodating low-key industrial activities which require re-location or which are operating from unauthorised sites?

1.3.2 Responding to a changing technologies and global influences

The shift towards an increasingly knowledge/technology based economy means that many businesses straddle the traditional divide between office and industry. Some of these (e.g. SportingBet) have been able to house their operations in standard office accommodation, others (e.g. HealthSpan) have split their operations between office and industrial accommodation and in some cases 'front office' activities on island have been separated from 'back office' activities off island. Others (e.g. Specsavers) have chosen to bring their on-island operations together under one roof, combining administration, marketing and design, assembly, storage and despatch. Given these changed circumstances and the rapidly altering world markets and technological advances there is an underlying need for flexibility in terms of business premises.

Key Issue 1.3.2

How can we ensure that the provision of new business/industrial accommodation is responsive to technological innovation and changing circumstances?

1.4 *Primary sector*

GENERAL SITUATION

The Island's primary industries have been in decline for many years, with both horticulture and agriculture contracting and restructuring dramatically since the 1980s. Stone quarrying is now almost exclusively for the Island's internal requirements with no significant export trade. The fishing industry appears to be stable at present but only makes a minor contribution to the economy of Guernsey.

KEY FACTS

- Only 3% of the Island's workforce is employed in the primary sector.
- Overall, the value of the horticulture industry appears to have stabilised at about 1% of GNP. Although the plant production sector contributes 75% to the export value of the industry, it only occupies 11 hectares of glasshouses (70 vergees). Edibles are now a specialist crop with just 27 hectares (165 vergees) compared with the mid-1960s when the industry occupied over 300 hectares (1,830 vergees). There are now just 103 commercial growers compared to the high of 3,000 or so. Employment in the industry has declined to 421 full-time equivalent posts since the peak of 5,275 full-time equivalents in 1966.
- There are 52 farmers running 21 dairy farms and 31 other farms. This is compared with the 1983 figures of 113 farmers running 106 dairy and 28 other farms. Since 1983, the total area in farming has declined by over 2000 vergees to a figure of 9076 vergees. Over the same period, the average size of farms has doubled and the average size of milking herd has increased from 22 to 70 head of cattle.
- 150k tonnes of stone was extracted from Les Vardes Quarry in 2006. In 2006, imports of stone and stone dust were 7,977 tonnes and 3,571 tonnes respectively. 42k tonnes of demolition and inert waste was processed in 2006 with 33k tonnes crushed and graded material sold and 9k tonnes of fines sent to Longue Hougue tip.
- The fishing fleet has increased since December 2004 by 20 vessels. There was an increase in days at sea in 2005/2006 compared to 2004. Although landings by weight have been relatively stable over the last 4 years, the value has increased from just over £3million in 2003 to £3¾million in 2006.

See Key Issues 1.4.1 – 1.4.4

KEY ISSUES

1.4.1 Farming

The majority of farms lie within the rural area's Area of High Landscape Quality. Recent States consideration of milk subsidies highlighted the importance of retaining a viable farming economy as a crucial element in protecting the recognised character of our countryside. A reduction or restructuring of the sector may result in a significant loss of environmental and countryside management capacity. The cost to the community in retaining these services may, ultimately, increase pressure to use the land for more economical pursuits. Therefore supporting appropriate forms of diversification within the sector may help secure a workable degree of environmental stewardship. Inevitably the costs of farming in Guernsey will remain high, with a steep cost of labour, a scattered pattern of small fields that limits the use of large machinery and the expense of providing farm services to a small number of farms.

Key Issue 1.4.1a

How many farms, what size of herd and what land acreage will be required to sustain a viable dairy industry?

Key Issue 1.4.1b

How can economic diversification of farm holdings be encouraged in order to support the industry?

Key Issue 1.4.1c

Where land is no longer being farmed and former agricultural buildings are no longer required, how can we ensure that they are used for the most beneficial purpose?

Through positive environmental stewardship and good husbandry, Guernsey's farmers have been the traditional custodians of its diverse landscapes and habitats. The island's hedge banks, unimproved grasslands and wet meadows owe their existence to well managed grazing regimes and judicious silage cutting. Disused fields rapidly revert to scrub or are colonised by invasive plants such as Japanese Knotweed. Alternative land management regimes, through say the keeping of horses or intensive garden maintenance, can also dramatically alter the character and appearance of the countryside. Recreational use of the countryside tends to be concentrated in a few honey-pot locations where the pressure of over-use can impact upon the quality and character of the area. Land that was formerly in agricultural use could provide opportunities to enhance access to the countryside.

Key Issue 1.4.1d

How can farm restructuring and diversification promote opportunities for access to the countryside, landscape enhancement and habitat restoration?

1.4.2 Horticulture

A large part of the cut flowers sector is expected to reduce over the next few years as growers retire or move into other occupations. The edibles sector has recently settled down to a small number of specialist growers producing quality niche crops for multiple outlets. Increasingly, there will be higher sales and value for the top few businesses currently trading, but under half the industry surviving with little growth forecast. This rationalisation is likely to leave behind a considerable number of redundant glasshouses/vinery sites, a few of which may be suitable for alternative use. The remaining larger-scale vineries may have slightly different development needs in the future.

Key Issue 1.4.2a

How can the rationalization and consolidation of horticultural development be accommodated?

Key Issue 1.4.2b

How can we ensure that redundant/derelict glasshouse sites are used for the most beneficial purpose?

1.4.3 Fishing (see also Part 2 section 4.3.3: harbours)

The fishing industry supplies the many local restaurants with a variety of fresh fish and shellfish, with boats unloading their catches at the Guernsey Fishermen's Co-Op on the Castle Emplacement. In the long-term, future improvement of harbour facilities should provide benefits to the fishing industry.

In 2007, record high sea temperatures were recorded, sea temperature changes of this magnitude will affect marine life off the island's shores.

Key Issue 1.4.3a

In order to sustain the Islands present and future fishing fleet, how can the improvement of shore-based facilities take place?

Key Issue 1.4.3b

How shall factors such as climate change and competition within local fishing grounds affect the future make-up and requirements of the fleet (e.g. impacts on fish stocks/species)?

1.4.4 Minerals extraction

Ronez operate the only operational hard rock quarry on the Island at Les Vardes. At the current rate of extraction, the reserve will be worked out by 2015, however, it is understood that Ronez will be submitting an application to extend quarrying at Les Vardes on land it already owns. If granted this would significantly extend the projected life of the quarry. The existing quarry at Les Vardes and an area on the Chouet Headland are identified as Mineral Resource Safeguarding Areas in the Rural Area Plan.

Granite quarrying remains of some importance to the local economy as it contributes towards construction and engineering projects across the island. Ronez, are also the leading supplier of aggregate, pre-mixed concrete, concrete products and road surfacing on Guernsey. This helps to limit imports of these bulky materials.

The recycling of inert rubble waste as aggregate has helped to divert the quantities of construction waste going to landfill and has reduced demand for aggregate from other sources. Recycled glass is crushed by "implosion" to produce a material which is suitable for backfilling of domestic drainage runs, sub base to patios, concrete slabs, drives etc. Under contract, Ronez will re-crush the material to dust for use in their concrete products.

Key Issue 4.4a

Would the economic and social benefits of an island quarrying industry outweigh the local environmental impacts of stone extraction after the reserves at Les Vardes have been exhausted?

Key Issue 4.4b

Would a shift away from stone extraction towards more importation and recycling of material as aggregate, combined with concrete batching and manufacture of concrete products, represent a more sustainable long term solution?

1.5 Visitor economy

GENERAL SITUATION

The visitor economy on the island is currently refocusing towards meeting the higher quality expected by todays visitors, with considerable investment taking place in the industry across all categories of accommodation. Today's visitors tend to be aged 45 plus, and hence are part of the fastest growing sector of the population. They are typically well travelled with reasonable disposable income. There is a higher demand for accommodation in the urban area than in the rural area, particularly outside the months of April to September.

KEY FACTS

- Since 1991, the reduction in serviced accommodation has been over 35% of 3-5* hotels and 40% of 1 and 2* hotels and guesthouses. The stock of self-catering accommodation has fallen by approximately 10% over the same period. Since 1999, the rate of decline has accelerated, with a 24% decrease in both rooms and beds. In Jersey, the number of registered bed spaces has reduced by almost two-fifths over the past ten years, although the rate of decline has slowed considerably during the past four years.

- As at December 2005, Guernsey had 28 hotels graded 3-5*, 45 other hotels and guest houses and 111 self catering establishments, offering 2,419 rooms/units and 6,007 bed spaces. For comparison, Jersey has 161 registered accommodation establishments offering 13,000 bed spaces.

- In 2007 excluding yacht crew and cruise ship passengers, a total of 321,000 visitors came to Guernsey, an increase from 316,000 in 2006, but still lower than the 2005 figure (compared with Jersey which has almost 730,000 visitors of which just over half are staying leisure visitors).

- In 2007, the distribution of different types of visitors to Guernsey was as follows: 236,000 holiday visitors; 8,000 visiting friends and relatives; 68,000 business visitors; 9,000 other visitors; 20,000 yacht crew and 28,750 cruise ship passengers.

- In 2007, 160,000 visitors stayed in serviced accommodation, mostly in hotels and 13,000 visitors used self catering accommodation. The annual average room occupancy rate was 55% (compared with 56% in 2006 and 57% in 2005) peaking at 78% in August. The average annual room occupancy rate for Jersey is 70%.

- The age profile of visitors and especially those on holiday in Guernsey is biased towards the 35years and over age groups.

- In 2007, 72% of holiday visitors were in a party of two. About 12% of holiday visitors are accompanied by a child(ren).

- The estimated overall visitor spend, excluding travel costs, for 2006 was £54m compared with £50m in 2005. Annual visitor spend in Jersey is £222m.

See Key Issues 5.1

KEY ISSUES

1.5.1 Guernsey as a visitor destination

Guernsey boasts many attractions. The island’s natural scenery is stunning, from breathtaking cliffs and bays in the south to splendid beaches in the north and west with rich and varied landscapes between. In the east of the island, St Peter Port is high regarded as the ‘jewel in the crown’, set on a steep escarpment overlooking the harbour with fine townscapes of historic buildings, a web of winding streets and venelles and secluded gardens. Visitor attractions in St Peter Port include Guernsey Museum and Art Gallery in Candie Gardens, Castle Cornet and the house of Victor Hugo. Guernsey also has an impressive array of historic and archaeological sites including unusual churches and fortifications. The various parks around the Island provide not only clean open spaces for relaxation, but also the venues for many shows and festivals during the summer months. A varied calendar of events continues to restate the Island’s unique cultural identity and attracts many repeat visitors to the Island. Guernsey Museum and Art Gallery, Castle Cornet, Fort Grey and Saumarez Manor have met the accredited Visitor Attraction Quality Assurance Standard (VAQAS), which is delivered nationally by VisitBritain.

Over the last two years there has been a trend to re-invest and refurbish across all grades of visitor accommodation. Substantial investment has been made in refurbishment and/or extension hotels in all categories from one star to four star, including the Fregate, Fermain Valley, Farmhouse, Bella Luce, Fleur du Jardin, Duke of Richmond and others. The OGH has been purchased by a leading international hotel operator. A number of hotels have recently been upgraded from one star to two star following investments. The Vazon Bay hotel has recently been purchased for redevelopment within the Visitor sector. This pattern of reinvestment demonstrates significant confidence in the future of the sector.

Key Issue 1.5.1a

How can the island’s attractiveness as a visitor destination be enhanced?

Key Issue 1.5.1b

How can investment in upgrading and improving accommodation on prime sites be encouraged?

2 COMMUNITY & SOCIAL

2.1 Housing

GENERAL SITUATION

The overwhelming majority of people are satisfied with both their accommodation and the area in which they live, yet there are three times as many households in Guernsey with problems of damp as in Britain; twice as many with problems of mould or a leaky roof, and almost twice as many households with a lack of adequate heating facilities. There is a wide consensus that housing is a major area, if not the major area, to be tackled in order to deal with relative poverty on the Island.

Household growth has fuelled steady house price inflation. Over the five year period of 2001-2006, the number of domestic households rose by approximately 1,800 reflecting a number of socio-demographic trends. With a vibrant economy and full employment, more young people choose to live independently, rather than remain under the parental roof until marriage. The growing divorce rate (now more than 50% of all marriages) also means that 'one household can quickly become two'. Older people are living longer, and remaining healthier as well meaning that they can choose to remain in their own homes, or to move into 'sheltered housing', rather than into residential accommodation.

KEY FACTS

- There are around 24,500 households on Guernsey. Based on this figure and the estimated population size (61,800) the average household size appears to have fallen to 2.49 from 2.51 in 2001.

- Since 2001, St Peter Port has accommodated just over 1000 additional households representing a 14% increase; St Martin and St Sampson have both seen a 6% increase in households; the Vale and St Pierre du Bois have seen the number of households increase by 5%; in Forest and Castel a 4% increase is apparent; the smallest increase in households has occurred in St Andrew, which like St Saviour has recorded just 2% growth in the number of households. Remarkably, the number of households in Torteval has increased by 12% with the addition of 45 households.

- Between 1991 and 2001, the total number of local market properties increased by 7.5% to 20,894 units while the total number of open market properties remained stable at approximately 1,770 or less than 1% of the housing stock.

- Housing accounts for one third of the average weekly household expenditure. The local market average house price has risen from £212K in 2001 to £345K for the second quarter of 2008. There has been a 33% increase in the lower quartile average price over the past 5 years. For comparison, the four quarter moving average (£326,269) is slightly less than London (£336,545) and more than the South East figure (£270,262). Open market average prices have risen from £405K to £946K over the 2001 – 2008 period.

- The 2006 Housing Requirements Study (HRS) shows that housing in Guernsey became very unaffordable in the late 1980s and early 1990s due to a combination of high house prices, high interest rates and a recession on the island. Latterly, the affordability of housing has remained relatively steady despite the rise in house prices, due to interest rates being relatively low. However, housing has become progressively less affordable since 2003.

- The joint waiting list for Housing Department and Guernsey Housing Association accommodation has fallen from a peak of 196 in 2001 to 107 in 2006, the lowest figure for nine years.

- The Housing Land Availability figures (Q1 of 2008) indicate that 755 additional units (563 urban / 192 rural) are either under construction or are in the 'pipeline' with some form of permission.

- There were 303 residential units available for sale or rent in Guernsey in February 2008 which equates to 1.3% of the existing housing stock.

- The Townsend Study in 2001/02 indicated that damp problems affect 25% of Guernsey households yet 95% of Islanders believe that 'a damp free home' is a necessity that everybody should be able to afford and nobody should have to do without. In 2001/2, fourteen percent of Guernsey households said they could not afford a 'damp free home'. In the same survey, poor housing conditions were reported to be affecting the health of more than one in 20 people. One in 10 adults aged under 30 or over 65 reported health problems caused by poor housing conditions.

- The 2006 Housing Requirements Study reported that, in total, 5,090 households contained at least one member with a health problem. Of the Guernsey residents with health problems, 75% (4,242) were able to care for themselves, and the remaining 25% (1,447) needed care or support. Of those residents who require care, 91% (1,321) felt that their care needs were being met. However, 7% (96) of those with care needs required more care services and 2% (30) needed to move to another form of accommodation such as sheltered housing or a residential home.

- The 2006 Housing Requirements Study identified an overall 5-year net requirement for 1,698 additional dwellings. The net requirement is attributable to an indigenous growth of 1,215 households (as more households form than dissolve) coupled with a net gain of 483 households through migration; the balance of housing requirements is for 9% social housing, 15% intermediate housing and 77% market housing.

See Key Issues 2.1.1–2.1.4

KEY ISSUES

2.1.1 Housing land availability

In recent years almost all development has taken place on brownfield sites. The vast majority of development has been in the Urban Area and primarily in St Peter Port.

Based on the 2006 Housing Requirements Study, the projected future housing requirement for the next 5 years is 1,700 dwellings, of which 400 homes will be a mix of social and intermediate tenure provided through the Corporate Housing Programme. A major report into the recruitment and retention of "key workers" identified the specific requirement to provide dedicated rental accommodation to meet their needs.

Recent figures for dwellings, either currently under construction or benefiting from a planning permission, indicate in excess of two years supply. The designated Housing Target Areas of the UAP retain an estimated capacity for up to 1000 new dwellings and the Leale's Yard MURA is expected to yield in the region of 200 additional dwellings within the next 5 years.

Opportunity sites (brownfield sites, conversions and sub-divisions) within the urban area are projected to continue to yield between 150 & 250 new dwellings each year for the next 5 years, while the rural area is likely to yield an estimated 50 new dwellings each year, through sub-divisions and conversions alone.

Key Issue 2.1.1

How can the island's housing requirement be satisfied for the next 15 years?

2.1.2 A range of homes to match housing needs

The Social Housing Development Programme aims to replace/redevelop obsolete and un-conforming housing stock with new developments that better match the needs of the community. This rationalisation and renewal of the existing stock means that most of the need for social rental/intermediate market housing will be accommodated through brownfield redevelopment, at least for the foreseeable future. This also affords the opportunity to consider the inclusion of improved social facilities such as play areas and community centres.

The potential use of Planning Covenants to secure a proportion of social rental/intermediate market housing as part of residential development schemes within the HTAs has been approved by the States.

In the older parts of St Peter Port there has been a shift in the housing market towards multi-unit developments and subdivisions, often in the form of smaller flats/apartments, replacing larger family sized housing. Elsewhere in the urban area new residential developments have provided a mix of house types and sizes. In the rural areas, the tendency has been to replace or extend smaller homes in order to form larger units.

Key Issue 2.1.2a

How can we ensure fair access to a range of house types, sizes and tenures and achieve mixed neighbourhoods that are socially inclusive?

Open market properties are available for purchase by those not residentially qualified to live in Guernsey. This was seen as a way of attracting wealthy residents to the Island encouraging a 'trickle-down' effect throughout the local economy. It has successfully allowed key entrepreneurs to become resident in the Island. The presence of companies such as Specsavers, Healthspan and Long Port is owed in some part to the open market system.

Some of the open market housing stock is no longer of sufficient quality to attract high net worth individuals. In some cases, lower quality open market housing has been traded-in and returned to the local market in exchange for well designed modern open market housing in prime locations. Further rationalisation of this sector and trade-ins to help improve the stock of open market housing by exchanging with local market properties, may help to bring about positive regeneration through large-scale development. There may also be potential to tap into the growing trend for wealthy patronage of 'grand designs' in spectacular locations which often champion leading edge eco-friendly design principles.

A Labour Utilisation Strategy Group formed from the public and private sector was established in 2007 to investigate the most appropriate legislative regime to control population and labour use generally. This will include a review of the open market housing sector and will culminate in a report to the Policy Council for its final decision.

Key Issue 2.1.2b

How can we ensure that the potential benefits of the Open Market sector are fully exploited?

Key Issue 2.1.2c

How can we facilitate the exchange of low quality open market accommodation for well designed and environmentally friendly open market housing?

2.1.3 Sustainability & design

Access to a decent home is a key element, if not the key element, of sustainable living, yet much of the island's housing stock is dark, damp and difficult to heat. Climate change could exacerbate these problems with more prolonged periods where damp conditions predominate and present difficulties for temperature control and energy management in the home.

Key Issue 2.1.3a

How can we achieve a step-change in sustainable design in order to improve natural light, ventilation and energy efficient/economical heating in more homes?

Key Issue 2.1.3b

What can be done to encourage the use of innovative design to allow for new homes to adapt to climate change in a sustainable manner?

2.1.4 Lifetime homes

In an ageing society, we need to ensure that older people are supported, for as long as possible, to maintain independent lives and that housing providers offer desirable options that meet the needs of older people.

The findings of the 2006 Housing Requirements Study seem to indicate that very few residents need to move to another form of accommodation such as sheltered housing or a residential home. This may reflect the high volume of single floor accommodation (i.e. bungalows and apartments with level access) and the close knit nature of the island with its family support network. The results would seem to support a policy approach that favours adaptation of the existing stock and the application of Lifetime Homes Standards to new homes in order to enable residents to remain independent in their own homes for longer. In addition, however, it is likely that the demand will increase for retirement housing, sheltered housing and extra care housing. Useful information on this and other aspects of accommodation, care and support will be provided by the care and accommodation strategy for older people.

Key Issue 2.1.4

How can we ensure that homes and neighbourhoods are suitably planned and designed to facilitate independent living for older residents?

2.2 *Crime & disorder*

GENERAL SITUATION

Guernsey is generally a 'safe' place to live and has low levels of crime relative to comparable locations. The people of Guernsey experience less crime than British people in most categories of crime, especially crimes of violence. Nonetheless, certain types of crime and disorder such as youth vandalism are felt to be spoiling Guernsey society.

Priority 7 of the Government Business Plan states the government will: "promote and support policies that keep the Bailiwick a safe and secure place to live. This means taking a firm action against crime and tackling the situations that give rise to criminal behaviour...'. In order for this priority to be effectively achieved it is essential that all government departments recognise the contribution they can make to crime reduction and work in partnership to this end.

KEY FACTS

- In 1997, the States of Guernsey set the police force establishment at 177 officers; during the last few years there has been an average of155 officers.

- The figures for 2007 showed a drop of 11.4% in the crime rate from 2006. Between 2005 & 2007, the number of reported offences fell by 13% to 49 crimes per 1000 of the resident population. This compares to 52 per 1000 in Jersey. There are about 3.5 domestic burglaries per 1,000 households in Guernsey compared with an England and Wales average of 15.6.

- Over the longer term, reported crime has risen in the 10 years since 1998. Random acts of relatively minor criminal damage contribute the largest single proportion of reported crime (30%).

- The crime detection rate for 2007 was 32% compared with 33% in 2006, 34% in 2005 and 32% in 2004. The comparative figure in Jersey was 35% and for England and Wales it is 26%.

- The 2005 Fear of Crime Survey highlighted that 92% of respondents felt safe after dark in their own neighbourhood (compared with 85% in Jersey), but only 33% felt fairly safe after dark in Town or the Bridge, with 50% feeling 'not very safe' or 'not safe at all' after dark in Town. In Jersey, about 70% of people considered the centre of St Helier to be either a bit unsafe or very unsafe after dark.

- In an on-line survey, while just more than half of respondents were at least slightly concerned at the potential for being a victim of crime on a weeknight in Town, that figure leapt to 96% on Friday and Saturday nights. A total of 46% were slightly concerned about going to the Bridge at night on a weekend while 11% said it worried them even more.

See Key Issue 2.2.1

KEY ISSUES

2.2.1 Localised patterns of crime and disorder

'Fear of Crime' is a perception relating to the concerns and anxieties that people have about personal safety and security in their local area. In an initiative to help reduce the fear of crime, the Police Service has assisted in the establishment of several Neighbourhood Watch Schemes across the Island (17 NWS's in 2007). In addition, a community presence in the form of surgeries have been regularly set up with four surgeries at the Bridge; three in St Martins, three in St Peters and one at Admiral Park. Also, The Crime Prevention Officer assists in designing crime out at the planning stage of development proposals and has been involved with projects implemented by the Housing Association.

The on-going deployment of Closed Circuit Television (CCTV) includes the upgrading and development of the system in the Town and the Bridge with the installation of new camera sites and the acquisition of an island-wide transportable system. The phased programme includes the establishment of a central CCTV control room.

The Police, in consultation with other stakeholders, will seek to identify problem areas within the community and by a partnership approach will work to improve the quality of life in that particular area. Improved management of the public realm, which requires input from the Environment Department, Police Service, the Town Centre Partnership, Douzaines and other community interests in particular, could help to create more attractive and sociable spaces with the intention of peopling the streets and crowding out crime.

Due to growing statutory responsibilities there are now serious deficiencies in the standard of premises occupied by the Police. The need to safely store seized vehicles and other bulky items of evidence is an important requirement. Bringing the emergency services together under one roof could bring tremendous operational benefits such as shared garage and control room facilities. The overall harmonisation of Police and Customs should also be a consideration. The further development of St Sampson's Harbour (see 15.3: Harbours) together with major development proposals in the vicinity may lead in the future to the creation of a police sub-station on the Bridge.

Key Issue 2.2.1

What can be done spatially to help address actual and perceived patterns of crime and disorder, especially after dark in Town and The Bridge?

2.3 *Community involvement*

GENERAL SITUATION

It is intended that the policy development process for the island will contain mechanisms for the ongoing consultation and involvement of local communities and especially young people.

KEY FACTS

- 37% of males and 34% of females reported no involvement in a range of community, sporting, church or voluntary activities.
- 33,253 islanders registered on the Electoral Roll for the 2008 General Election, with the turnout averaging 56% of eligible voters per district. This compares with an average turnout of 63% in 2004.
- The voting age in Guernsey was reduced to 16 years in 2008.
- In 2001, a public exhibition on the review of the Urban Area Plan attracted 850 people to venues at Town and The Bridge.
- In 2002, before starting to draft the new RAP, a total of 21,000 consultation leaflets & questionnaires were distributed to households and a series of manned 'roadshows' were held at 6 different locations across the Island, which were attended by around 1,000 people.
- Over 400 people visited the Leale's Yard Mixed Use Redevelopment Area exhibition on the draft development framework for the Outline Planning Brief.
- A major research project to find out the views of the island's 10-17 year olds was undertaken in spring 2007.
- In Law, it is presumed that a child is capable of forming a considered view from the age of 12 years.
- The appointment of a Community Development Officer by the Guernsey Sports Commission has improved the engagement of young people in positive activities.

See Key Issue 2.3.1

KEY ISSUES

2.3.1 Engaging with the public in policy development

Mechanisms for the on-going consultation and involvement of local communities, especially young people, in the policy development process are vital and will ensure that the community is fully engaged. Any potential solutions need to be tailored to local conditions following extensive and fully inclusive consultation exercises.

In the under-18 age group, there are a small number of disadvantaged young people in Guernsey, for whom the transition to adulthood is especially difficult, with housing insecurity or homelessness, poor prospects of work with labour market exclusion, persistent poverty and, in some cases, recurring offending and anti-social behaviour. Developing a shared corporate commitment to addressing the needs of young people is particularly important.

Key Issue 2.3.1

How can the States engage more fully with the whole Island community and especially young people in the policy development process?

2.4 Sports, leisure and the arts

GENERAL SITUATION

Guernsey has a better than average range of recreational facilities, allowing many local, national and international competitions to be staged on the Island. Major sports facilities include Beau Sejour Leisure Centre, The Track, the Footes Lane Athletics Complex and the Table Tennis and Indoor Cricket Centres at Hougue du Pommier, as well as many other private or dual-used sports facilities. Informal leisure opportunities and in particular the amount of land accessible for public enjoyment, are also important indicators of quality of life.

Cultural facilities include the concert hall at St James and its adjoining Dorey Centre, the main public theatre at Beau Sejour and the new Performing Arts Centre. In addition, there are a range of public and private museums and over 80 historic sites including Castle Cornet, Fort Grey, Vale Castle and Chateau de Marais, for which the States are responsible. There is also an impressive legacy of fortifications.

The arts are well represented too: the local language, Dgernésiais, a variation on Norman French, is kept alive by enthusiastic groups and individuals, which now have official support from the States of Guernsey; Victor Hugo wrote much of his best known work during his 15 years of exile at his home in Hauteville; and the visual arts are flourishing with the new galleries and artists studios and the International Artist-in-Residence Programme. The performing arts also gained a new venue with the Princess Royal Performing Arts Centre, while the island's musicians continue to win local and international acclaim.

KEY FACTS

- In 2008, there were 16,000 members of sporting organisations including: football with 2,364 members (up from 1,830 in 2005), golf with 2,219 members (a drop of 370 from the 2007 high and down from 2,475 in 2005), cricket with 1,501 members (up from 1,449 in 2005 and reversing the decline in 2006) and tennis with 1,407 (up from 1,116 in 2005 and equal to 2006 and 2007). Like cricket, hockey has increased participation following previous decreases in membership, and Rugby has regained interest following a sharp fall from a sudden increase.

- In a 2001/2002 survey on the quality of life in Guernsey, 7% of respondents cited a shortfall in sports/leisure/entertainment facilities and the need for better shopping facilities. Respondents felt that more entertainment and activities for young people would 'keep them off the streets' and stop them getting into trouble.

- In 2006, the amount of land available for public amenity was 10,025 vergees or 25.8% of Guernsey's total land mass. Out of the total land available for public amenity, 78% belongs to the Crown (mainly consisting of the beaches and coastal areas) and 8% is administered by the States (in the form of parks, gardens, cliffs and former quarries). The island has about 30 beaches offering a variety of orientation, shelter, and seclusion. Many of the beaches have a refreshments kiosk, parking and toilets.

- It is estimated that up to 20,000 people per annum use the Millennium Walk at St Saviour's Reservoir.

Key Issues 2.4.1 – 2.4.4

KEY ISSUES

2.4.1 Sports facilities

Sport is generally well catered for within the island. However, there are some significant shortfalls in the provision of facilities. A shortage of grass pitches and the need for artificial training pitches remains the biggest issue for both football and rugby. The grass wicket facilities meet cricket's current needs, but a general improvement of facilities would enhance provision and the Guernsey Cricket Board's recent affiliation to the ICC means that there will certainly be pressure for at least one more cricket square. There is demand for additional indoor space from a variety of sports including archery, gymnastics, and equestrianism.

The provision of certain new or improved facilities would play a significant role in increasing participation and standards in local sport. In addition, a more effective use of resources may be achieved by upgrading facilities. Examples of this approach can be seen at Beau Sejour Centre and at Footes Lane. Similarly, it is important to consider the dual use of school sites for community use. However, dual use arrangements for gymnastics are more difficult because of the setting up and dismantling times for equipment.

Key Issue 2.4.1

How can the requirements for additional indoor and outdoor sports facilities be accommodated?

2.4.2 Informal participation

Many young people prefer informal participation in sports such as basketball, football, and skateboarding without having to pre-book facilities. Through the StreetSport programme, young people on Les Genats Estate have been encouraged to make use of their own environment for sports activities, introducing them to sports they can play anywhere at anytime (football, basketball, tag rugby, Frisbee etc). There is a need for more informal settings, like the new ball court on Le Bouet Estate, to be integrated within built-up areas, so that a wider range of youngsters can have immediate, independent and free access to a sports facility. This kind of initiative can help divert youngsters away from criminal and disorderly behaviour and develop community cohesion.

Key Issue 2.4.2

How can we accommodate more informal settings that can be used by young people who do not ordinarily participate in formalized arts, sporting and cultural activities?

2.4.3 Urban open spaces

Improving access to urban 'green' space involves enhancing access routes, (such as footpaths and cycle routes) and the provision of urban nature. Urban nature includes: parkland at Beau Sejour and Delancey with facilities for sports and playgrounds; Victorian 'pleasure' gardens at Candie and La Vallette; natural areas and semi-natural public land such as Le Chateau de Marais and Vale Castle; the coastal strip from Spur Point to the Halfway and Montville Drive; cemeteries, churchyards and burial grounds; a variety of ornamental plantations and gardens; and the new ecology park planned for The Belgrave Vinery area. When providing accessible 'green' space, it is important to consider what form/type this provision should take and the different values that various people will attach to it. Providing urban 'green' space that is, say, 5 minutes away will not in itself ensure that residents of an area will appreciate it.

In addition to 'natural green' spaces, there are a host of other urban open spaces that contribute to the amenity of the urban area and provide places for social interaction. Many of these urban amenity spaces are home to trees and plants and provide opportunities for new planting and/or succession planting. There are some notable examples where these spaces have been improved and enhanced including: les Echelons; the Crown Pier; the Liberation Monument; and Market Square. Other opportunities exist to address conflicts between pedestrians and motor vehicles and reduce crime and anti-social behaviour; the routes and connections between these spaces also need consideration. Some attention could also be given to The Bridge area, which has received relatively little attention.

Projections suggest that climate change will have implications for the design and management of public open space. It is expected that demand for and use of urban open spaces will increase as temperatures rise. People who may not be able to adapt their indoors environment are generally better able to cope with high peak temperatures when they are outdoors. So under extreme weather events, public urban open spaces may be particularly important for vulnerable members of society.

Key Issue 2.4.3a

What can be done to improve access to urban open space?

Key Issue 2.4.3b

What can be done to enhance the quality of urban spaces as places for social interaction and amenity value?

2.4.4 Public art

Given the growing interest that the arts are receiving, it is hoped that the recently established Guernsey Arts Commission will achieve higher levels of participation and experience of the arts through a raised profile and greater private investment.

Public areas can be made more attractive by the inclusion of artworks and bespoke street furniture. Jersey, for example, has introduced a Percent for Art Initiative, which requires developers to include some public art as part of their submissions. A similar community arts project could be realised in Guernsey through the development of a Public Arts Strategy and the Eastern Seaboard Initiative probably offers the likeliest opportunity for taking this approach forward.

Key Issue 2.4.4

What can be done to ensure that opportunities for public arts projects are realised?

2.5 Health and social care

GENERAL SITUATION

The health impacts of the Island are changing with poverty, the impacts of increased car use, rising bodyweight generally and obesity rapidly establishing themselves as the island's next major public health challenges. At the same time, the provision of health services is also changing. For example, conditions that had been regarded as terminal e.g. Down's Syndrome, various forms of cancer and HIV, now respond to the treatments available. This means that the number of people requiring care, support and accommodation are constantly increasing. In addition, the number of people with age related needs is increasing demand for social services such as home care and for more specific services such as care for people with dementia. The increased burden on staff resources can only be met by recruiting personnel with the necessary expertise from elsewhere.

KEY FACTS

- Guernsey has a higher 'life expectancy at birth' for both males (77.5 years) and females (82.0 years) than most comparator countries, and only a little behind Sweden (77.6 years and 82.1 years respectively), which is recognised as having amongst the best health in Europe.

- The number of residents aged 75 years or more is projected to increase by around 30% over the next decade.

- The poorest in Guernsey are four times more likely to be ill and are over fifteen times more likely to report social isolation or depression during the past year than more affluent people.

- The proportion of Guernsey men who were 'overweight' had increased from 50% in 1988 to 64% in 2003; whilst for women it had increased from 41% to 52% with a high of 57% in 1998. It has been estimated that the wider economic costs of rising levels of obesity (including the impacts on quality of life and economic productivity) would reach a sum equivalent to £45.5 million annually in the Guernsey context.

- The 2006 Housing Requirements Study reported 5,689 people as having health problems; the main problems were related to impaired mobility and difficulties due to old age.

- The Survey of Guernsey Living Standards identified over 3,000 households in Guernsey as poor. Almost half of these households have one or more children. When considering the proportion of each household type who are poor, almost two thirds of lone parents with one or more children are suffering from poverty, as are a quarter of large households with children.

- A significant proportion of households with dependent children are currently in unsuitable housing – including 26.5% of single parents and 23.7% of groups of adults with dependent children.

See Key Issues 2.5.1 – 2.5.2

KEY ISSUES

2.5.1 Health and mobility impacts

The fact that people are living longer is likely to have a significant impact upon the Island's health-care services including long term care. In addition, the poorest people in Guernsey are the most likely to suffer health problems which are often aggravated by sub-standard housing conditions.

Unrestrained growth in private car travel increases air pollution, high levels of self reported stress among motorists, and discourages walkers and cyclists from using the roads, which in turn leads to fewer opportunities for exercise and rising levels of obesity. Promoting a more physically active lifestyle is the obvious key to reversing the growing trend to overweight and obesity in Guernsey.

Key Issue 2.5.1a

What can be done to address the health and mobility problems faced by an ageing population and especially the least well off?

Key Issue 2.5.1b

How can we create places that facilitate a more physically active lifestyle?

The narrow and meandering streets of St Peter Port are greatly admired as one of the island's principal attractions, but the cobbled surfaces and steep slopes can be difficult for people with restricted mobility to negotiate independently. Despite the limitations of the island's historic environments, more can be done to overcome the barriers faced by people with restricted mobility. Small improvements to facilitate access for people with a physical or sensory disability can make a big difference to how they feel about getting around independently and being catered for.

Key Issue 2.5.1c

What can be done to improve conditions for people with restricted mobility?

2.5.2 Young people and families (see also: 1.2.3 the evening economy; 2.3 community involvement; 2.4.2 informal participation)

A holistic and integrated approach to the issues that impact on families and young people could have implications for matters such as employment opportunities, decent housing, crime reduction, health improvement and social services. The importance of focussing on young people is highlighted in Corporate Anti-Poverty Programme and the Bailiwick Drug and Alcohol Strategy. Based on information in the report by the Townsend Centre, it will be important for neighbourhood initiatives to target needy families and children in identifiable areas of deprivation such as those living in rented accommodation in St Peter Port and the area around the Bouet estate.

Key Issue 2.5.2

How can we improve access to and use of facilities to meet the needs of young people and families?

2.6 *Education*

GENERAL SITUATION

Education on the Island is generally regarded as being of a very high quality.

The provision of modern, fit for purpose facilities for all phases of the education system is one of the prime objectives of the Education Development Plan (EDP). Programme 1 of the EDP focuses on educational provision within the Special, Secondary and Post-16 education sectors. The States have already completed four projects – Le Rondin School & Centre, a primary special needs school and assessment centre, a Sixth Form Centre for the Grammar School, the Princess Royal Centre for Performing Arts for the College of Further Education and the first of three new high schools, St Sampson's High School, which is co-located with a new special needs school for secondary age pupils, Le Murier.

Over the next decade or so the Education Department plans to complete the reorganisation of secondary education by developing two new high schools, provide a new College of Further Education on a single campus and convert an existing building into a centre for pupils with social, emotional and behavioural difficulties. The Department is also reviewing the provision of primary education and considering the introduction of nursery education.

The Island offers a traditional apprenticeship scheme that recruits students who otherwise may well have stayed in full-time education. A mean tested grants system is in place to support local students wishing to attend university.

KEY FACTS

- There are about 9,000 school children between the ages of 5 and 16 (the school leaving age was raised to 16 in 2008/09 academic year).
- There are 11 primary schools, 2 infant schools, 1 junior school, 3 high schools (St Peter Port School is due to close in July 2009), a co-ed grammar school, two special needs schools and a College of Further Education. In the private sector The Ladies' College, Blanchelande Girls' College and Elizabeth College (boys) take fee payers with some special place holders supported by the States.
- 45% of the population has gained qualifications at NVQ Level 2, followed by 36% with intermediate qualifications, 12% at degree/HND level and 15% at higher degree level.
- In 2007, the proportion of Guernsey pupils achieving five GCSEs (grade A* - C) was 61% compared to the 2005 peak figure of 64%. The proportion of Guernsey pupils achieving at least one GCSE was 84.3%, which was 2% below the seven year peak of 86.4% reached in 2005.
- Guernsey students who sat A-levels and GCSEs regularly outperform those in the UK. The 2008 A Level results saw a 100% pass rate which is a year on year increase since 2003. 84.6% of A Levels were grades A-C in Guernsey in 2008 compared with 73.9% in England. At GCSE level 77% of GCSE's were at grades A-C compared with 65% in England.
- In 2007, 71% of the 16 year old cohort was in education and 80% of the cohort was in education and training. The numbers of 18 year olds in Education and training remains at 42% in 2007. This is the largest proportion ever of students staying on to education and training and the number is expected to increase as the school leaving age was raised to 16 years in 2008.

- The number of students in higher education has steadily increased from 774 in 1994/95 to 992 in 2007/2008.

- More females than males are entering into post-16 education.

- The most popular subject studied by the Island's undergraduates are: Combined studies, Art & Design, biological studies and business studies

See Key Issue 2.6.1

KEY ISSUES

2.6.1 Design and use of education sites

Some of our school buildings are showing their age and need to be improved. The Education Department has embarked upon a significant programme of redevelopment and new build in order to improve and rationalise the Island's education infrastructure.

The Education Development Plan, which is already well underway, has allowed the reorganisation of special needs education from 3 schools to two and the reorganisation of secondary education from four schools to three (completed in July 2009 following the closure of St Peter Port School). St Peter Port Secondary School will become the site of a new College of Further Education. The former Oakvale buildings are also due to be converted to provide a Centre for pupils with Social, Emotional and Behavioural Difficulties. The proposals will increase capacity in the Post-16 sector and allow the school leaving age to be raised to 16 in 2008.

The completion of this first phase of redevelopment has allowed the College of Further Education to relocate some of its courses to the vacated St Sampson's Secondary School buildings at Delancey. Other courses will relocate to the St Peter Port buildings following the closure of the school. These moves will release some of Education's older unsuitable buildings such as Grange House opposite Elizabeth College in The Grange, the Old Boys' Grammar School in Brock Road , theformer Longfield School buildings adjacent to Amherst School and Granville House in Mount Durand.

Key Issue 2.6.1a

How can we ensure that the rationalization/re-organisation of schools and colleges takes place in the most sustainable locations, where new facilities can be integrated with other development and adopt best practice principles for sustainable design, construction and environmental management?

Key Issue 2.6.1b

Given the States' commitment to maintaining a static population size, will the Education Department's on-going programme of works result in the release of former education sites for alternative uses? Can some sites be adapted to allow for greater community use outside of school hours?

PART 2: RESOURCES (OPPORTUNITIES AND CONSTRAINTS)

3 POPULATION

3.1 Demographic change

GENERAL SITUATION

Guernsey, in common with all Western European countries, has a birth rate that is substantially below the figure needed for a population to maintain its level naturally, without immigration. However, the island's economic success puts a strain on internal resources, so the Government operates a highly selective immigration policy for both individuals and businesses.

KEY FACTS

- In 2007, the estimated total population was 61,811, an increase of 782 people on the previous year. Over the last 35 years, the island's population has steadily risen by 19% at an average rate of 273 people a year.

- The natural increase (births minus deaths) peaked at 140 in 1999, but due to a fall in birth rate fell to a natural decrease of 12 in 2002. Since then the birth rate has fluctuated slightly while the death rate has steadily fallen. In 2007, there was a natural population increase of 132.

- With zero migration, Guernsey's population would decline to just fewer than 45,000 (i.e. equivalent to the population in 1961) by 2063. Net migration of 300 persons per year would grow the population to a peak of 69,937 in 2043 before falling back to just under 67,000 by 2063.

- Based upon estimated population figures for 2007, Guernsey has a population density of 973 people per square kilometre, which is two and a half times higher than the population density of England (387) and 27% higher than the population density of Jersey (760). Malta, however, has a population density that is 56% higher than Guernsey, at 1,518 people per square kilometre. Bermuda's population density is 20% higher at 1,155 per square kilometre.

- The dependency ratio in Guernsey is 49%, compared with 48% in Australia, 53% in France and the UK, and 55% in Sweden. If no net immigration is allowed the dependency ratio will deteriorate to 76% by 2033, with a further deterioration to 89% by 2063. The proportion of the population over 65 is predicted to increase from 16% to 30% by 2033 and 35% by 2063 if no net inward migration is assumed.

- The resident population of St Peter Port was 16,488 in 2001, 361 fewer people than in 1951 when the parish's population was 16,849. Between 1996 and 2001 St Saviour and the Forest saw the greatest increase in resident population, growing by 9.2 and 8.9 percent respectively. Castel, St Sampson and the Vale saw the smallest increases, growing by under 0.7 percent.

- A total of 571 households are currently living in technically overcrowded housing –though as many as 213 of these households (37%) consider their home to be about the right size.

- The annual Business Trends Survey found that 53% of respondents felt that maintaining the current population level would limit business growth potential.

See Key Issues 3.1.1 – 3.1.2

KEY ISSUES

3.1.1 Actual or perceived overcrowding and congestion

As a whole, Guernsey is more densely populated than some of its larger island competitors, but it is less densely populated than some offshore centres with a similar landmass such as Bermuda.

By keeping the size of the population in check, Guernsey has been able to minimise unemployment and homelessness and provide a high standard of education, healthcare, sanitation and drinking water. In the 1960's, overcrowding was a serious problem affecting about 20% of all households but nowadays barely more than 2% of households are affected.

The population density of St Peter Port is broadly the same as it was in the 1950's, yet the population in the remainder of the island has increased by half as much again. At the same time, there has been a massive shift from a predominantly pastoral economy where the vast majority of people earned a living from the land and from tourism in the rural area, to a predominantly knowledge and service based economy where employment is mainly concentrated in St Peter Port. These structural shifts in the distribution of the resident and workplace populations have exacerbated the impacts of traffic congestion at peak commuter times.

Key Issue 3.1.1

How can we address the actual or perceived impacts of overcrowding and congestion?

3.1.2 Working population

The establishment, growth and maintenance of 'high-value' employment and the provision of good quality public services requires a steady influx of skilled employees. The finance sector needs more skilled workers to maintain the sector's momentum, as there is currently a desperate shortage of staff possessing the required knowledge and expertise. Key public services such as health, education and policing need staff with the requisite skills and experience to deliver the quality of services that the island demands. Ultimately, however, there is an upper limit to the level of population we can sustain without a severe drain on resources or serious deterioration in the quality of life. Moreover, an increase in the population of say 3,000 from immigration will not only result in an increase in the workforce of 3,000 because incomers will bring their dependants. However, if the working population is allowed to shrink, as would occur without a net immigration policy, then the burden of funding essential services and infrastructure will fall on fewer and fewer people.

Key Issue 3.1.2

How can we ensure that the availability of a skilled workforce is consistent with the continued success of the economy as well as the preservation of the quality of life and the physical environment?

3.1.3 Ageing population

Guernsey faces significant demographic issues with its ageing population. This highlights the need to ensure that older people are able to make a full and active contribution to the social and economic life of the community. Ensuring active participation by older people relies upon them maintaining their independence through personal mobility, healthcare and social inclusion.

Key Issue 3.1.3

How can we ensure that opportunities are available for older people to play an active part in the community?

4 FUNCTIONAL

4.1 Energy

GENERAL SITUATION

The Government Business Plan (2007) contains a level 1 Priority: 'To adopt policies which ensure a diverse and robust supply of energy sufficient for Guernsey's needs, while also improving energy efficiency both to minimise the need to import energy and to reduce the Island's carbon footprint'. One of the aims is to 'identify steps required to switch progressively to clean renewable energy sources'. It will also consider what actions could be taken to lower our present level of energy consumption. An Energy Policy Group has reported on energy policy in general and possible future scenarios for renewable energy.

KEY FACTS

- Around 20% of Guernsey's electricity is generated on the Island, with the remainder being imported via a cable link with France. In Jersey, 98% of electricity is imported.

- In 2007, 58.9% of the electricity consumed in Guernsey was imported from nuclear power sources. Renewable sources contributed 5% of the energy consumed.

- Over the last ten years, total electricity consumption has risen by 30%; whilst the total number of consumers has only risen by 5.6%. Annual electricity consumption is 340GWh/y compared with 254GWh/y in 1996.

- Per capita electricity consumption has steadily risen over the last 10 years from 4.3MWh to 5.5MWh per annum. In Jersey, per capita consumption is 6.8MWh per annum. This compares to 5.7MWh in the UK.

- In 2007, the per capita consumption of gas was 1,795kWh, which was 16% less than in 2006. Per capita consumption of gas in Jersey is lower at 1,512kWh per head. This compares with 11,300kWh in the UK.

- The States of Guernsey – through its various departments and agencies – accounts for almost 10% of energy consumed. Guernsey's commercial sector accounts for 46% of the electricity consumed, and consumption in this sector has risen 30% in the past decade.

- Guernsey households spend on average 24% more on fuel than their UK counterparts. Fuel, light and power accounted for 6.4% of expenditure in 1964, rising to 8.2% in 1983, and then falling to 3.9% in 2006.

- In 2006 the total amount of oil imported to the Island rose by 14% on 2005 figures to 124,673,000 litres. This rise appears to be due, in part, to an increase in heavy fuel oil used in the local production of electricity and an unrelated increase in demand for transport fuel.

- In 2004, emissions from power generation were only 37% of those in 1990, largely as a result of the switch to imported energy. However, between 2004 and 2006 carbon emissions from power generation almost tripled to 28 ktonnes. Carbon emitted from road transport is at its highest ever level at 30 ktonnes of carbon. Carbon emissions from aviation and shipping stood at 45 ktonnes in 2006 compared with 29 ktonnes in 1990.

See Key Issues 4.1.1 – 4.1.3c

KEY ISSUES

4.1.1 Energy efficiency (see also: 5.5.2 Quality of new buildings)

Energy efficiency measures reduce energy consumption and subsequently costs for homes and businesses. Reducing demand puts less pressure on energy supplies. Design is a very important aspect of making new buildings energy efficient, but so too is the way in which the building is managed.

To achieve carbon neutral development, new buildings need to reach a very high energy performance standard and incorporate onsite renewable energy sources. Elsewhere there are a number of examples of developments, such as social housing accommodation, where the scheme has been designed to be carbon neutral. The Guernsey Housing Association have appointed the Building Research Establishment (B.R.E.) to advise on incorporating sustainable solutions and energy efficiency measures into the design and specification of all their new developments.

On relatively large sites such as Housing Target Areas (HTAs) and other strategic housing and employment sites, the installation of ground-source heat pump systems could be considered as a cost effective method of district heating. There is also potential to explore the distribution of waste heat to off set primary energy use for heating and cooling.

Key Issue 4.1.1

What can be done to ensure that new buildings exceed minimum performance standards and make use of on-site renewable energy sources?

4.1.2 Traffic and transport (see also section 4.5: accessibility; and section 5.2.1: air quality)

Road transport makes a significant contribution to the island's carbon emissions, although the biggest contribution comes from aviation and shipping. Whilst reducing the need for air and sea travel may be unrealistic, it may be possible to offset the carbon emissions through tree planting schemes.

Key Issue 4.1.2

What can be done to reduce the need to travel or offset carbon emissions?

4.1.3 Renewable energy sources

At present, most renewables are not cost effective when compared with fossil or nuclear derived energy but in the medium to long term there will be extreme pressures on conventional energy as a result of global warming, rising energy consumption and depleting resources. Increasing the level of renewable energy production within the island will not only create new markets and drive innovation, but will also reduce our reliance on imported energy.

The Pentland Firth (between Orkney and the north coast of Scotland) and the Bailiwick of Guernsey each have a large proportion of the total British tidal stream resource (40% and 25%, respectively). Research has demonstrated that tidal stream is a potentially valuable resource with energy unit costs that should be comparable with other renewable resources given further development. Robert Gordon University has carried out comparative modelling of the Pentland Firth and Channel Islands resources. The updated RGU result for the Channel Islands predicts a usable resource that far exceeds the power needed for the entire

Channel Islands. However, other resource estimates vary widely and will need to be verified. It has been estimated that tidal stream energy could become cost competitive within an installed capacity of 2.8GW.

Guernsey Electricity has begun monitoring tidal current flows with the objective of identifying potential sites for a tidal stream scheme. Marine Current Turbines Ltd, in which Guernsey Electricity has an equity stake, are due to install a 1000kW tidal energy turbine in Northern Ireland's Strangford Lough. The device has the capacity to generate electricity for approximately 800 homes. The installation of the device will enable the developers to assess the impact the technology will have on the environment and also to showcase the commercial potential of tidal stream energy.

A recent study for The Marine Institute and Sustainable Energy Ireland outlines the potential economic benefits of developing the ocean energy industry in Ireland and leads to the conclusion that the industry would have the potential to contribute to creation of valuable intellectual capital, economic wealth and employment opportunities. In the recently published DTI/Carbon Trust Innovations Review wave and tidal energy were identified as technologies with global potential. The Innovations Review concluded that, other than wind power, tidal stream energy ranked as being one of the best technologies in terms of the potential economic benefits and cost effective environmental impacts.

One practical suggestion for Guernsey is the idea of an ocean pier to allow mooring for cruise liners. This could incorporate vertical axis rotors (used by such companies as Canada's 'Blue Energy') between the supports. As the Blue Energy turbines are hooked in series, they can also come on line in series, with the first units creating revenue and offsetting debt before the last units are in place. There are some concerns, however, about the possible tidal weir effect of such an installation.

Key Issue 4.1.3a

What can be done to diversify our local energy production through renewable sources?

Key Issue 4.1.3b

If we can reduce our dependence on the oil fired power station, can the facility be down-sized and thereby release land for other purposes?

After minimizing waste through recycling and efficiency measures, using residual waste products as fuel can help to reduce and neutralise the quantity of wastes that have to be disposed of and reduce CO_2 emissions through the displacement of fossil fuels. Diverting biodegradable wastes from landfill also helps to reduce methane emissions, which are 23 times more potent than CO_2 in terms of global warming.

Key Issue 4.1.3c

How can the recovery of energy from waste be optimised?

4.2 Water

GENERAL SITUATION

Guernsey is almost totally reliant upon the rain water collected and stored in the Island's reservoirs. The impacts of climate change will have a direct effect on Guernsey Water's ability to collect and retain enough water to meet the Island's increasing demand.

In September 2006, the States of Deliberation agreed that once quarrying has ceased at Les Vardes Quarry, then the quarry should be used as a fresh water reservoir. Ronez estimate that the workable stone reserves will be exhausted in approximately 20 years.

With responsibility for the Island's freshwater environment, Guernsey Water needs to ensure that it conserves and enhances the natural environment within the Water Catchment Area.

KEY FACTS

- In 2007, 868mm of rainfall was recorded (5.5% above the climatic mean) compared with 762mm in 2006 (7.5% below the climatic mean).

- Guernsey Water has 15 quarries and reservoirs with a total capacity of 4425 ML of water storage (which represents about 10 months of normal usage).

- During October 2007, reserves of water fell to their lowest level in the year standing at 3,749ML, which represents 84.7% of the total storage capacity. By the end of the year however, raw water reservoirs were 95% full.

- Guernsey Water operates three Water Treatment Works (WTWs). In 2007, WTWs achieved a record water quality rating of 99.9%; service reservoirs achieved 99.6%.

- In 2007, total water consumption fell to its lowest level for the last 20 years, the total put into supply stood at 4,510ML against a peak of 5,396ML in 2002. The 2007 domestic water consumption figure stabilised at 2747ML after registering four consecutive annual decreases since a peak in 2003.

- In Guernsey, the average consumer uses 130 litres of water per day.

- During 2006, the number of customers on metered supply increased by 791 taking the total number of metered customers to 12,597 compared to 11,500 customers who are not metered. On average, metered domestic consumers used 16% less water than metered customers in 2007.

See Key Issues 4.2.1 – 4.2.2

KEY ISSUES

4.2.1 Water catchment

The main issue surrounding water catchment relates to the Marais. It accounts for more than 20% of the island's potable water resources collected from the streams that converge at Barkers Quarry and then pumped to storage at Longue Hougue Reservoir. Steps need to be taken to ensure that the maximum possible amount of rainwater is successfully channelled to the Island's reservoirs.

Allied to the need to maximise the collection of water is the need to minimise the risks of flooding to the development in and around the low-lying areas of the Marais. With climate change and increased urbanisation, flooding problems will only worsen unless we take steps to manage the risks effectively. We need to manage surface water more sustainably, increasing the capture and reuse of water, encouraging slow absorption through the ground, and where appropriate, provide more above-ground storage and routing of surface water separate from the foul sewer. Such an approach will reduce flood risk, improve water quality, and lessen the burden on the sewer system, which otherwise will struggle to cope with the extreme rainfall events that climate change is likely to bring. Keeping excess rainwater out of sewers will be a particularly important element of adaptation because the potential capacity of the landscape to absorb, store and convey water is much greater than the below-ground system.

Key Issue 2.4.1

How can an integrated approach to water resources and drainage management be achieved?

4.2.2 Water consumption and conservation

The decrease in annual water consumption may be a result of users beginning to conserve water more effectively together with Guernsey Water's continuing improvements to the Island's water supply infrastructure. If the population is maintained at around 60,000 in line with the States approved strategy, it is not expected that domestic water consumption will rise significantly. Climate change scenarios, however, predict that we will see drier summer months and milder, wetter and windier winter months with increasing year round temperatures; all of which could lead to depleted storage levels and more water lost through transpiration and evaporation. The wise use and conservation of water resources is therefore of critical importance for the future.

Key Issue 4.2.2

How can the efficient use and re-use of available water resources be maximised?

4.3 Communications

GENERAL SITUATION

The Strategic Economic Plan stresses the need to: *"Maintain and enhance connectivity with the outside world in terms of travel, freight, voice and information communications and access to markets."*

KEY FACTS

- Investment in new infrastructure has quadrupled the off-island telecommunications network capacity. Guernsey has one of the highest take-ups of broadband services in Europe. An estimated 30% of all households have high-speed Internet access, compared to around 24% for the UK. 90% of young people aged 10 – 17 years have internet access at home.

- In 2007, the number of direct air transport routes reduced from 14 to 12 and there were 5 sea routes operating a daily schedule.

- Since 2002, the rise in resident (air and sea) passengers has been more than offset by a sharp decline in visitor passengers. In 2007, total passenger movements increased by 39,628 or 3.2% on 2006 figures - still 3.8% down on the ten year peak in 2002. Air passenger figures rose by 23,284 passengers to 892,360 in 2007, although air passenger movements have remained fairly constant over the last ten year period. Sea passenger movements increased by 16,344 on 2006 figures to 358,419, representing a rise of 5% on the previous year.

- Over 98% of all commercial commodities are landed or depart by sea. In 2006, a total of 185,577 tonnes of cargo were imported at St Sampson's Harbour. In the same year, 182,835 tonnes of general cargo were imported at St Peter Port Harbour.

- In 2007, 19,792 crew on board 6,393 pleasure craft visited Guernsey, a decrease from the 2006 figures of 23,295 crew aboard 7,714 vessels and a further drop from the peak of 63,882 crew on 13,460 vessels in 1990.

- It is expected that 92 cruise ships will visit Guernsey in 2008. The 10 year average is 60 vessels. About 76,000 passengers came ashore in 2006, contributing in excess of £700 000 to the local economy (about £9 - £10 per head). This compares with Bermuda where 336,000 cruise visitors went ashore contributing $65.3m to the local economy (about $195 per head).

See Key Issue 4.3.1a – 4.3.2c

KEY ISSUES

4.3.1 Telecommunications

For Guernsey, the availability of reliable and cost-efficient communications can reduce the costs associated with doing business and play a vital role in facilitating inward investment. Small and medium size businesses are increasingly using broadband to improve their efficiency. The ability to work from home – either full or part-time – is further driving demand for high-speed internet services. Faster broadband services mean it will be easier and faster for Guernsey residents to shop online, bank, download content for education and entertainment, talk and access a whole host of other internet services. The installation of telecommunications masts and antennae has proved to be a highly controversial issue because of the close proximity of homes and other occupied buildings.

Key Issue 4.3.1a

How will increasingly accessible and improved telecommunications affect the workplace and the need to travel?

Key Issue 4.3.1b

What will be the impact of internet use on retail trade and services?

Key Issue 4.3.1c

How can the impact of telecommunications and equipment be addressed?

4.3.2 Airport

Air routes provide vital connections for residents, visitors and businesses. Overall passenger figures have fallen and residents form an increasing proportion of those people that travel by air. This means that fewer seats are available for overseas visitors and business travellers. Some businesses are apparently turning to light aircraft on unscheduled services as a cost effective and convenient alternative.

Based on current use, the airport has spare capacity for approximately 100,000 additional air passenger movements. However, the “air side” working areas are already under great pressure with limited scope for improvements. Increasing the throughput of passengers and/or extending the hours of operation at the airport would have resource implications and would impact on the surrounding community, for example noise levels and vehicular movements. There are plans to provide a potential Runway End Safety Area (RESA) and to consider options for realignment of the DELTA taxiway, both of which would involve developing land outside the western and south western airport boundaries. In the future, if the need to extend the runway is established, the development will have considerable impacts on the valley to the east of the airport.

Key Issue 4.3.2

What can be done to plan for the long term strategic operational requirements of the airport?

4.3.3 Harbours

The basic ports facilities remain largely unchanged, apart from some limited modifications and refurbishments, since the late 19th and early 20th centuries, yet marine operations and activities, passenger movements, freight shipments and vessels have totally transformed to serve the island's 21st Century requirements.

Close to 2000 marina berths are provided in the Albert, Victoria and QEII marinas. There is increasing demand from larger yachts to moor in Guernsey. At the moment any vessel larger than 50 to 60 feet cannot be accommodated in the marinas. The Victoria Marina is an attraction for visiting crews who provide trade for nearby shops, restaurants and services. However, during a period that leisure boating has become increasingly popular there has been a massive decline in the number of pleasure craft and crew visiting St Peter Port.

St Peter Port is a popular destination for cruise liners because of its particularly beautiful and sheltered anchorages, quality port services, professional handling arrangements and hospitality. The island has also become a favoured destination for new ships undertaking what is known as a 'shake-down' trip. The port is capable of handling at least two large cruise liners at any one time. The transfer by tenders normally takes no more than five minutes and both landing sites are within easy walking distance of the town's shops and restaurants. The landing facilities have been improved with the addition of a temporary pontoon and ramp for cruise passengers using the inter-island quay and a more permanent arrangement is planned for 2009.

St Peter Port is also a busy working port, which handles all of the island's Roll On – Roll Off (RO-RO) and Lift On – Lift Off (LO-LO) containerised traffic. It is predicted that the cargo facilities will require expansion/relocation by about 2020. The existing cranes and container handling facilities need to be upgraded. Storage and marshalling of containers within the port environment mean that large sections are out of bounds for the general public. The need to manage freight imports alongside the boarding and disembarkation of passenger ferries complicates the need for secure segregation of traffic and adequate facilities for effective border controls.

The island's fishing fleet, which is dominated by smaller day boats, land their catches at the Guernsey Fisherman's Co-op. Although fishermen compete for space with other marine related activities on the Castle Emplacement, their activities enliven the harbour scene and contribute to the overall character of the harbour.

The piers, quays and breakwaters of the harbour are also enjoyed by visitors and islanders for a variety of leisure pursuits including angling, model boating and sightseeing.

Key Issue 4.3.3a

What can be done to rationalise and improve port operations and the use of quayside areas at St Peter Port harbour?

Key Issue 4.3.3b

What can be done to enhance St Peter Port Harbour for visiting vessels, passengers and crew?

St Sampson's Harbour handles the importation of bulk dry goods such as timber, coal, cement, sand and aggregate. Stone aggregate and dust from the Le Vardes quarry is transported to the stone yards on North Side for concrete batching and block making. Inert construction waste is also recycled and processed on this site for use as hardcore and backfill. Imported cement is collected in silos on South Side. Cessation of quarrying on the island would necessitate improvements to handle the increased importation of rock and aggregate.

An area of water has been impounded at Longue Hougue and is used for the disposal of inert waste as well as accommodating a number of boat moorings for local craft. It is intended that the reclaimed land will eventually accommodate waste management facilities and harbour related activities.

The northern port also handles the discharge of hydrocarbons with heavy oils going to storage on North Side and LPG fed to tanks on South Side; petroleum is stored at sites on North Side and South Side. Tankers importing LPG to the island currently bottom out at the quay on South Side, which significantly escalates the risks associated with any catastrophic incident. In addition, the lessons from the Buncefield incident has lead to a major re-evaluation of safety at petroleum storage sites. These safety concerns, added to the fact that the 'Not Always Afloat But Safely Aground' (NAABSA) fleet is diminishing and changes to international legislation, mean that the pressure to develop deep water berths at St Sampson will increase in the future. One of the benefits associated with extension of St Sampson's Harbour would be the opportunity to transfer RO-RO and other general cargo activities from St Peter Port.

The island's main boatyards are also located at St Sampson's Harbour, principally the commercial boat lift, slipway and engineering works operated by Marine and General alongside the Bridge and the manufacture of motor yachts and cruisers by AquaStar at Longue Hougue. The M&G yard, in particular, typifies the busy working character of the harbour. In recent years, the Harbour's appearance has been transformed by the introduction of 350 marina berths for pleasure craft.

Key Issue 4.3.3c

What provision needs to be made at St Sampson's harbour to accommodate the importation of stone, waste management facilities, the safe discharge and storage of hydrocarbons, the transfer of freight operations from St Peter Port and other marine related activities and industries?

4.4 *Waste management*

GENERAL SITUATION

The future provision for an Integrated Waste Management Facility still needs to be determined following States approval of a Waste Disposal Plan (Solid Materials) for a 25 year period. Making significant progress towards waste reduction/recycling targets is emphasised in the Government Business Plan; for example, developing measures to achieve an increase in recycling to 50% by 2010. (Priority 6, Level 3 Action)

Guernsey sewage is mainly domestic in origin and organic in nature, with very little industrial contamination. Sewage receives preliminary treatment at the Belle Greve Headworks prior to being pumped through a long sea outfall. Even if wastewater treatment is upgraded the Belle Greve Headworks will remain a vital part of the network. Refurbishment of the Headworks is one of the States' priorities for capital expenditure. A programme of sewerage network improvements and extension has been rolled out with a target of connecting 95% of dwellings to the public sewer.

KEY FACTS

- The amount of domestic waste rose from 21,324 tonnes in 2004 to 23,543 tonnes in 2006, which was nearly a 10% increase. But household waste increased by less than 1% from 2006 to 2007. The householders recycling rate of 31% in March 2008 is an increase over the rate of 19.8% recorded in 2005. As a result the quantity of household waste put into landfill fell to 284kgs/capita, which is the lowest figure since 2003.

- In 2006, 32,686 tonnes of commercial and construction waste was dumped at Mont Cuet, 17% less than in 2005.

- The amount of inert waste deposited at Longue Hougue increased in 2007 after falling for 3 consecutive years.

- Approximately 90% of sewage flows to the Belle Greve Headworks located off Les Banques. The Creux Mahie Headworks in Torteval receives approximately 10% of sewage.

- Flows received at Belle Greve vary from less than 200 litres per second (4million gallons per day) to over 1000 litres per second under storm conditions (20 million gallons per day). At the peak of high spring tides, up to 30% of the flow pumped through Belle Greve outfall is derived from infiltration of saline water. In wet weather, up to 80% of the flow may be derived from surface or ground water including potential water resources diverted from the water catchment.

- Some 5,700 properties will remain on cess pit until they can be connected to the sewerage network. Prior to 2001 the volume of sewage collected by road tankers was increasing at 1.5% per annum; 187,573 tanker loads were collected during the peak year of 2001. Since 2001, the number of sewage tanker loads has reduced by 1.8% per annum as more properties have been connected to the sewer.

See Key Issues 4.4.1a – 4.4.2

KEY ISSUES

4.4.1 Solid waste

Guernsey needs to reduce the volume of waste currently going to landfill. With the limited remaining landfill capacity at Mont Cuet, a permanent waste disposal facility is planned for the reclaimed land at Longue Hougue.

The Fontaine Vinery site is currently used as a temporary materials recovery facility pending the future enhancement and development of the Belgrave Vinery Housing Target Area. The metal recycling operations to the north of the Longue Hougue reservoir remain a serious threat and potential source of contamination. In the future, it is likely that a dry and mixed waste materials recovery facilities and scrap metal facilities will be accommodated at the Longue Hougue reclamation site. The permanent civic amenity site was planned to be at Longue Hougue but this needs to be re-examined in the light of the Buncefield report.

There are recycling sites throughout the Island where householders can deposit cardboard, glass bottles and jars, aluminium drinks cans, food tins, cardboard, paper, plastic bottles and clothing/household linen. The States have adopted a target of recycling 50% of all household, commercial and industrial waste by 2010.

Inert waste disposal is currently being carried out at the Longue Hougue site but future potential sites include the Black Rock area on North Side.

Key Issue 4.4.1a

What provision should be made to minimize residual waste and maximize the recovery, re-use and recycling of waste materials?

Key Issue 4.4.1b

What provision should be made to deal with residual waste?

4.4.2 Waste water

The Belle Greve headworks is the focus of practically the entire sewerage network. Besides the gravity flows, the headworks also receives discharge from the White Rock, St Sampson's Harbour and La Piette pumping stations situated on the eastern seaboard. Sewage receives preliminary treatment comprising maceration and grit removal and it is then pumped through a long sea outfall to a discharge point one mile from shore in the Little Russel. Good dispersion is achieved by discharging partially treated sewage into the tidal currents through 5 diffusers at a minimum depth of 10 metres at low tide.

The Belle Greve headworks requires major refurbishment whether or not full sewage treatment is advanced. The upgrading work will include a new preliminary treatment facility and possibly storm water storage which will probably occupy the land immediately to the north of the existing head works.

The Red Lion outfall is used for sewage discharge when the Belle Greve pumping station is being maintained. Its longer term use will be as an emergency backup to the long sea outfall during storm flows. This outfall is due to be upgraded and possibly extended as part of the forthcoming upgrading work at the headworks. In addition, there are a number of other combined sewer overflows (CSOs) and surface water outfalls along the eastern seaboard, all of which are vital drainage assets.

The programme of sewerage network improvements and extension has helped to reduce the volume of wastewater that would eventually require treatment.

Key Issue 4.4.2

What provision should be made for wastewater treatment?

4.5 *Accessibility*

GENERAL SITUATION

The whole matter of accessibility is highly contentious. Although the continuing long term trend for high levels of car travel on Guernsey remains a dominant factor, a number of priorities have been identified in the Government Business Plan and in the Environment Department's Operational Plan to help mitigate the effects of heavier traffic flows.

KEY FACTS

- In 2007, the number of vehicles taxed for use was 53,563 compared with the 2005 figure of 47,876. Since 1990, car registrations in the Island have increased by almost 15%, whereas motorcycle registrations have increased by 60% over the same period.

- Guernsey has just less than 300 miles of public highway. In 2006, traffic volumes at peak times along the Grange, Les Banques, and Les Val des Terres reached the highest recorded levels since 2003. The route between Richmond Corner and the Weighbridge is the busiest in the island. Traffic volumes along Les Banques reached peak levels between 9,592 and 11,209 vehicles per day (compared with 7,404 and 8,017 for 2005). Typically, peak time journeys along this route take approximately 12 minutes.

- There are approximately 1000 long term (10 hour) parking spaces provided at North Beach, Salerie and the Odeon. In addition, there are a further 700 long-term on street parking spaces and 300 spaces limited to a 5 hour stay. There are also approximately 1,400 short-stay spaces in St Peter Port and some 23 hour spaces in outer areas. In 2001, the Chamber of Commerce indicated that an additional 1,772 parking spaces were needed; research subsequently found that the maximum that could be reasonably accommodated without unacceptable congestion was probably around 800 spaces. Since 2001, approximately 2,100 private non-residential parking spaces have been provided in the vicinity of the central St Peter Port town area, about two thirds of which are for business commuters.

- The 2007 bus passenger figures show a record year with over 1.4 million journeys made, which is an increase of approximately 64% since 2000. Passenger journeys at commuter periods have increased by 71%. The number of passenger journeys made by OAPs has increased by 59% to over 210,000 per annum. Strongest growth has been recorded during the winter months, when journeys increased by 85% and journeys at commuter times increased by 95%. In the half of 2008, passenger figures set a further new record of 691,721 which was a 7.5% increase on the same period in 2007. The figures for the first half of 2008 showed a 13% increase in passenger numbers during commuter times compared to the same period in 2007 and a 9% increase in OAP passenger numbers.

- Around 65% of the urban area's population live within 15 minutes walking distance of major shopping facilities and there is a public open space within 15 minutes walking distance for around 85% of the population in the urban area.

- In 2007, there were 21 road traffic collisions resulting in serious injuries (of which half were cyclists or pedestrians) in Guernsey. This compares with 26 fatal or serious vehicular collisions in Jersey.

See Key Issues 4.5.1 – 4.5.4c

4.5.1 Personal mobility (see also section 4.1.2: traffic and transport)

People appreciate the independence offered by running their own vehicle, but the negative impacts of extensive vehicle use, such as environmental degradation and threats to personal safety, can restrict the freedom of others to choose alternative ways of getting around and in turn encourages greater vehicle use. Not all members of our community have access to unrestricted car use. Children and the elderly, for example, may have to walk, cycle or rely on public transport to access shops and facilities such as health centres, schools and parks. For these people, their personal mobility is relatively impaired by an environment which is largely designed for and dominated by motor cars.

Restricting car use would be considered by many to be too draconian, but people are increasingly concerned about the adverse impacts of traffic on climate, health and quality of life and about their own travel experience as congestion mounts. Therefore, it is important to offer people a fairer choice between travel options and to clarify the costs and benefits of choosing between them.

Without some form of control over car use it is reasonable to assume that the Island will experience continued growth in vehicle ownership and therefore increased congestion. Methods such as combining trips and car sharing can reduce unnecessary car journeys and reduce the amount of vehicles on the roads. The success of such schemes requires a considerable shift in the attitudes and behaviour of motorists. However, the recent appetite for recycling locally might indicate that public opinion is prepared to shift if there is a tangible and worthwhile goal.

Key Issue 4.5.1a

How can we accommodate the demand for increased personal mobility whilst mitigating the adverse impacts of traffic growth?

Key Issue 4.5.1b

How can we enhance personal mobility for all sections of the community including children and the elderly?

4.5.2 Public transport

Bus routes have developed around a 'hub and spoke' format, linking Town and the Bridge and radiating to outlying areas. Although this gives rise to frequent bus movements along the eastern seaboard, which adds to traffic volumes in this area, the structure of the Island's roads and economic centres make it inevitable that there will always be extensive demand for transport along this route. The potential to introduce alternative forms of transport is limited; and so the focus is likely to remain on buses.

The best way to make bus travel more appealing would be to provide high quality and attractive facilities, which could incorporate a covered bus garage, at the centre or hub of the network and ensure that new development and facilities are well linked to the main transit routes or spokes. The current bus terminus in Town does not meet modern standards. It is almost entirely open to the elements and in a relatively uninviting environment. Eye catching waiting areas and information points that are well lit, comfortable and functional, can play a part in encouraging people to utilise public transport. The Canary Wharf Underground Station and Zaha Hadid's Nordpark Cable Railway Station in Innsbruck, Austria are examples of facilities that are fit for purpose, attractive and desirable to spend time in and use.

Evidence from other islands suggests it is possible to shape travel behaviour by establishing development patterns that complement public transport provision and reduce car dependence, thus contributing to more sustainable lifestyles. The creation of compact, walkable communities centred on high quality public transport systems makes it possible to live a high quality life without complete dependence on a motor car. Transit oriented developments are generally located within a radius of half a mile (0.8 km) from a transit stop, as this is considered to be an appropriate scale for pedestrians.

Key Issue 4.5.2a

How can we provide better quality and more attractive facilities for public transport?

Key Issue 4.5.2b

How can we ensure that new development is well located in relation to the public transport system and nearby amenities?

4.5.3 Highway network

The northern approach to St Peter Port faces many traffic management challenges. It provides a major commuter route into the centre of Town as well as access to and from the developments along the eastern seaboard including Admiral Park, the Glategny MURA and numerous industrial and business units. A number of important "feeder" roads open onto the main approach and the route accommodates the movements of heavy goods vehicles between the commercial centres of St Peter Port Harbour and Bulwer Avenue. Three major new development initiatives in the north of the Island (Les Nicolles Schools, the Saltpans Industrial Estate and the Leale's Yard project) will add to the challenge. There is clearly a need to ensure good access between the Island's two ports.

The historic form of the public road network means that opportunities for alterations to the network that would benefit the motorist are limited and likely to be very expensive. Although some changes have been made, for example at Admirals Park and St Julian's Avenue/Glategny Esplanade, further changes of this nature are likely to benefit vehicular movements but at the same time should not be allowed to unfairly disadvantage other ways of getting around.

Effective traffic management can be achieved by bringing cross-modal transport planning and spatial planning together, and by implementing a balanced package of measures and initiatives aimed at providing realistic alternatives to the car, facilitating multi-purpose trips and managing car parking provision. Successful implementation relies on evidence to show that a specific measure or initiative can solve a certain problem, or save money.

Key Issue 4.5.3a

How can we provide satisfactory access through the optimum and efficient use of the highway network?

In the main urban centres, the historic road pattern remains broadly unchanged in its overall geometry and is mostly defined by buildings close to the back edge of the pavement. Roadways form the principal routes shared by pedestrians, cyclists, public transport and rising numbers of vehicles of increasing average size.

At present, the public highways are largely dominated by motor vehicles. Opportunities do however exist to reallocate the road space to better reflect a more balanced hierarchy of users. For example, in order to avoid holding up other traffic, bus lay-bys are often provided so that buses can pull off the public highway to pick up and set down passengers. This reinforces the perception that the car is above public transport in the hierarchy. Very minor alterations to the highway design could reduce this perception whilst allowing passengers to board and alight in safety and preserving roadside parking.

Such alterations to the network could result in increased journey times for motorists. There are several ways in which car drivers might respond to this; in some cases they will simply accept them. This is because either the increase in journey time is not particularly critical to them or because of the lack of an alternative. However, where alternatives do exist, some road users may use them. This might include the use of a less congested but possibly longer route; making the trip at a less congested time of the day; changing destination from a congested to a less congested location; reducing car use by combining trips; reducing the frequency of trips; or using other modes.

Another way of balancing the road hierarchy, is to share the road space more equally among users - shared surface schemes seek to achieve better integration between motorists and pedestrians. People's road sense can bemore strongly affected by the physical surroundings than by the application of the usual traffic apparatus. The change in surface from bitmac to block paving or bound gravel can signal to drivers to be more aware of their speed. Vertical elements like planting and trees also create 'obstacles' to slow the driver. This approach can work well in urban environments where there is potential for traffic/pedestrian conflict.

Key Issue 4.5.3b

How can the needs of all road users be better balanced?

In order to encourage the use of alternative means of transport, pedestrians and other vulnerable road users need to feel safe on the public highway. The use of pavements by motorists as an extension of the carriageway and recent incidents involving vehicles and pedestrians increase the fear of accidents for those that choose to walk or cycle.

Despite there being a large proportion of the population within walking distance of the commercial centres and other major employment areas and the journey time being reasonable, only a small percentage of the population choose to walk. The quality of the pedestrian environment plays a key role in influencing whether people choose to walk. Presently, large parts of the road network are adversely affected by traffic, not helped by excessive traffic clutter and poor quality paving.

Vehicles and the associated signs, barriers and lights have a negative impact on the character and ambience of an area. In the case of shops and leisure facilities, the presence of vehicle activity can have a negative impact on the very businesses those vehicles are visiting or servicing. This negative effect is experienced most when on foot, cycling or using public transport and directly influences our experience of the physical environment. The Quay, for example, is an area dominated by traffic movement yet offers potential for increased pedestrian use, social activity and business growth.

Key issue 4.5.3c

How can the physical environment be altered to create a safe and attractive physical environment for vulnerable road users?

4.5.4 Car parking

The centres of St Peter Port and the Bridge contain large areas dedicated to the parking of cars, with the North Beach car park offering the greatest number of spaces in a single location. However, there is a perceived need for additional parking within the southern area of Town and the States, in 2001, identified the need to improve accessibility for shoppers. Although the States subsequently resolved to approve in principle the provision of parking at the Fish Quay, this work failed to attract any investors or developers. The perceived lack of parking in this area is often cited as a reason for the decline of the Town markets despite the fact that it is highly accessible in terms of public parking, bus travel and the nearby concentration of homes and workplaces.

At present, the greatest demand for parking within Town would appear to be from commuters parking in the long-stay car parks. Of the current 3759 public spaces available, approximately 58% are long-stay (5 & 10 hour) and 42% short stay (½ to 3 hour) spaces. Although additional commuter parking could be provided, it is likely that the increased certainty of finding a parking space would shift the balance away from alternative means of transport in favour of the car and encourage more cars into the urban areas, further increasing traffic movement and associated noise, pollution and worsening pedestrian/vehicle conflict..

Much of the public parking is located within some of the most attractive harbour-side locations. Displacement of parking away from these areas could enable enhancement schemes to come forward to improve the pedestrian environment and create opportunities for recreation-related activities and development. Depending on the willingness to pay for parking, the construction of public parking areas beneath other forms of development could be financially viable, enabling alternative uses of existing surface car parking areas. New public parking could encourage private parking areas within developments to be used for other business purposes and other town parking garages/yards to be redeveloped for more beneficial purposes.

Key Issue 4.5.4a

What would be the impact of providing more public car parking facilities in Town?

Key Issue 4.5.4b

What alternative transport arrangements would need to be in place in order to capitalise on opportunities to use existing facilities for alternative purposes?

5 ENVIRONMENTAL

5.1 Climate change

GENERAL SITUATION

Guernsey is already experiencing long-term weather patterns similar to predicted climate change scenarios of warmer drier summers and milder, wetter winters. In the last few years, air temperatures in Guernsey have been generally higher than normal. There has been a significant reduction in air frosts and severe frosts appear to be a thing of the past. Sea surface temperatures are also increasing.

KEY FACTS

- Mean air temperatures have increased in the order of 1^{o}C since records began in 1843. The long-term average for the period 1843 – 1980 compared against the period 1981 – 2006, shows that every month of the year is getting warmer, with July and August showing the biggest increase of 1.1^{o}C while March and November have also shown significant increases of 0.9^{o}C and 0.8^{o}C respectively and small increases shown of 0.2^{o}C in February and 0.4^{o}C in December. 2003 was the warmest year on record, with a maximum air temperature of 34.3^{o}C on August 9th and other local record breaking temperatures in March, April, May, July and September. Nine of the months in 2007 recorded a higher mean air temperature than the 30 year average.

- Since 1946, a long term average of 5.3 frost days per year has been recorded, but the average for the last decade has been just 1.3 frost days per year and no severe frosts have been recorded in the decade.

- Since 1843, average annual rainfall has decreased by about 4%. During the same period, summer/autumn rainfall has fallen by 16% and winter/spring rainfall has risen by 10%. In 2007, a total of 868.7mm of rainfall were recorded, which was 5.5% above the climatic mean. Eight months of 2007 experienced more rainfall than the 30 year average.

- Since 1980, there has been an overall increase in the mean annual surface seawater temperature (taken from St Peter Port Harbour) of about 1.7^{o}C.

  Information from Cherbourg suggests that sea level in this part of the Channel has risen by over 4cm in the last 30 years. Future projections suggest a potential sea level rise of up to 74cm under the medium-high scenario of climate change.

See Key Issue 5.1.1

KEY ISSUES

5.1.1 Adapting to a changing climate

Changes in the climate have had a dramatic effect on agriculture in Guernsey. Warmer soils mean that seeds germinate earlier, crops continue to grow throughout the winter and there are fewer cold snaps to kill crop pests and diseases. Wetter winter months mean that although grass may continue to grow, the ground may flood and become 'poached' under the weight of cattle and farm machinery. Summer droughts mean that dairy cattle, which rely on a plentiful supply of fresh grass, often need to have extra conserves of food (such as grass silage) provided during the driest months. Some crops that could not be grown in Guernsey 30 years ago are now commonplace. Farmers and growers may wish to exploit opportunities for niche crops, such as outdoor herbs and exotic fruits and nuts, which thrive in frost free environments. It is conceivable that Guernsey growers may even consider planting vineyards and commencing wine production.

As a result of warmer seas, local fishermen have had to adapt to changes in fish stocks; for example, it is now more profitable to fish for bass, which are in abundance, than for crabs which are in decline.

Many would welcome the prospect of hotter, sunnier days with less rainfall and warmer seas. The island may even become a more favoured holiday destination as others become intolerably hot and the cost of long haul air travel begins to escalate.

On the other hand, the risk of flooding due to higher winter rainfall and by sea-water, especially during extreme storm surges, could increase in low lying areas of the island. Where appropriate, we will need to review sea defences and take action to protect vulnerable properties. In addition, greater consideration will need to be given to the possibility of flooding before new development proceeds. Serious flooding could also cause pollution of fresh water supplies, with much drier summers it will be even more important to conserve and protect water resources (see section 4.2: Water; and 5.2.2: Freshwater quality). Public urban open spaces, such as parks and gardens, may play a very important role in adaptation strategies for urban areas under projected climate change impacts (see also: section 2.4.3 Urban open spaces).

By assessing the impacts that climate change may have on factors such as infrastructure, agriculture, water resources and flooding, it is possible to plan for adaptation so that damages and costs can be minimised and perhaps some potential benefits realised. Adaptation to climate change needs to be embedded within all strategic planning processes. Planning for highest predictions could waste money. Planning for lowest predictions could jeopardize infrastructure adequacy, with greater costs.

Key Issue 5.1.1

How can adaptation to climate change be embedded within the strategic planning process?

5.2 Air and water quality

GENERAL SITUATION

Air quality in Guernsey is generally very good. The use of low sulphur fuels at the Power Station and the importation of electricity via the cable link can help to keep industrial pollution to a minimum. Since December 2000, 'real time' air quality monitoring has been set up to measure 'roadside pollution levels' in the Grange and 'background levels' on two sites some 200 metres away. Analysis of the data confirms that vehicle emissions from commuter traffic are the main source of atmospheric pollution in Guernsey.

The quality of raw water in storage and the quality of treated water for supply are excellent. Water that is fed to the customer's tap now reaches every water quality parameter set by the EU and UK.

The bathing water quality around Guernsey is very mixed. No local bay has consistently achieved the EC Guideline Standard in every year, although the Island is not legally committed to the European Bathing Water Directive. Beaches that have failed the Guideline Standard in recent years include Ladies Bay, Cobo, Petit Bot, Pembroke and Vazon. If the provisions of the new Bathing Water Directive (approved by the EU on 15th February 2006) were applied in Guernsey, there is a risk that the water quality in these popular bays may not meet its requirements.

KEY FACTS

- Taking into account all pollutants, Guernsey's greenhouse gas emissions were 578 ktonnes in 1990 and 579 in 2006.
- During 2007, levels of particulates rose above World Health Organization (WHO) standards. The maximum recorded levels for sulphur dioxide and ozone both dropped although ozone remained above WHO standard.
- Although background levels of nitrogen dioxide rose, the roadside level of nitrogen dioxide was the only air quality indicator to fall in 2006.
- Coinciding with both the morning and evening peak traffic flows, pollution levels in The Grange are almost twice as high as background levels and also double those on Saturdays, Sundays and Bank Holidays.
- Over the last decade, the annual average nitrate levels found in the Island's stream catchments has declined by 41%.
- Catchment Protection staff investigated 70 raw water incidents in 2007, a third of which were as a result of potential sewage pollution.
- Since 1998, the number of beaches gaining the EC Guideline Standard has declined from 11 out of 12 beaches (91%) to only 7 out of 13 beaches (53%). Others only pass the minimum water quality standard and one, Pembroke Bay, failed the European mandatory water quality standard. In Jersey, 11 of the 16 passed the Guideline Standard (69%). Historically bathing water quality at Pembroke Bay has been excellent. However for the period 2002-2006, results have shown a decline by 25% on that for the period from 1997-2001.
- In the 15th National Beachwatch Survey (2007), a total of 40 beaches were surveyed in the Channel Islands of those 31 were in Guernsey. Once again the Channel Islands recorded the lowest density for Sewage Related Debris (0.7 items per km).

See Key Issues 5.2.1 – 5.2.3

KEY ISSUES

5.2.1 Air quality (see also section 4.1.2: traffic and transport)

The main issue for air quality is the growth in motor traffic and fuel consumption. Traffic volumes and imports of transport fuel reached their highest recorded levels in 2006. The impact is mainly localised in a few streets such as College Street and Fountain Street where the polluted air is trapped by topography and buildings and it is less easily dispersed.

With a high level of car ownership and usage, existing peaks of atmospheric pollution associated with high pressure systems are likely to increase and lead to increased respiratory disease, particularly of acute asthma, and of exacerbations of chronic pulmonary disease.

Key Issue 5.2.1

What can be done to address the localised impacts of traffic on air quality in the urban area?

5.2.2 Freshwater quality (see also section 4.2: water; and section 5.1: climate change)

Being so heavily reliant upon surface water does expose Guernsey to the risk of contamination especially from inundation by sea water, flash flooding and the concentration of cesspits in certain areas. The greatest potential threat is to the Marais Stream catchment, which feeds into the Longue Hougue reservoir. Longue Hougue will shortly become the major water treatment facility and it is imperative that this resource is protected from activities that present a real and present risk of contamination. The increased risks of flooding could cause pollution of the freshwater supplies and therefore a drainage and surface water management plan for the St Sampson's Marais catchment is essential.

Key Issue 5.2.2

What can be done to protect the island's water resources from the risks of contamination?

5.2.3 Sea water quality

The discharge of raw macerated sewage into the Little Russell continues to cause concern to many Guernsey residents (see also section 4 above). However, the existing long sea outfall was designed and engineered to dilute sewage so that the natural marine processes available in the Little Russel were not overloaded. More than 95% of the bacterial contamination is removed by natural marine processes within the area between Fermain in the south to the Plate Fougere lighthouse in the north. Regular inspections of the outfall, bathing water quality and shellfish are undertaken. These reveal the present abundance and diversity of marine flora and fauna, which is considered to be indicative of water quality in the Little Russel. A Benthic survey would provide further evidence to assess the long term impact of sewage discharge on the marine environment.

So the pattern of bathing water quality is not easily explained by discharges from the wastewater outfalls, which suggests there are other local sources of pollution to be investigated and addressed. Surface water discharges are one factor that can adversely affect the quality of bathing water, particularly in shallow enclosed bays where streams discharge directly onto the beach. Potential solutions might include measures such as completion of the Network Extension Plan, longer surface water outfalls or reinstating natural wetland water storage. The installation of reed beds at St Saviours Reservoir provided an environmentally friendly solution to combat water quality pollution.

Key Issue 5.2.3

What can be done to improve sea water quality?

5.3 Land and accommodation

GENERAL SITUATION

The island's land and accommodation represents a scarce resource which plays a valuable role in determining our well being. Some is used commercially and contributes to GNP, other areas are used for open amenity and recreation and some fulfils an essential social role in providing the housing and other community facilities. With a limited amount of land available, how we use this resource in the future will be a key factor in shaping the quality of life in environmental, economic and social terms.

KEY FACTS

- Guernsey's landmass totals 6,358 hectares (38,796 vergees) compared to Bermuda at 5,301 hectares, Jersey at 11,793 hectares and the Isle of Man at 57,198 hectares. The Urban Area represents 13% of the Island's landmass whilst the Rural Area accounts for 87%.

- The States property portfolio accounts for 650 hectares (3,966 vergees), or 10% of the Island, and has been valued at around £1.5billlion.

- 15% of the island is built-up leaving 85% as open landscape. Buildings and their curtilages account for most of developed land (39% of all development or 6% of the Island), followed closely by roads and car parks (36% of all development or 5% of the Island). This type of developed land increased during 2006, whilst the amount of land used for greenhouses decreased.

- Between 1996 and 2001, 64% of all buildings erected in the island (measured in terms of building footprint or site cover, including extensions to buildings) were situated in the Rural Area. Between 2001 and 2006 this figure had fallen to 56%. By the same measure, during the period 2001 – 2006 39% of domestic development took place in the Urban Area whereas 53% of non-domestic development took place there. The overall trend indicates that a greater area of building site cover took place in the Urban Area during 2001 – 2006 than in the period 1996 – 2001.

- There is an average of 0.28 hectare (1.7 vergees) of land per household or 0.1 hectare (0.6 vergees) for each member of the population.

- In 1981, the States agreed to reclaim 11 hectares of land from the sea at Longue Hougue.

- 595 hectares (9% of the total landmass) are used commercially. At 387 hectares, agriculture uses 6% of the Island's land, horticulture covers 130 hectares (2%) and business activities such as office, industry, retail tourism and gardening utilise 77 hectares or 1% of the total landmass.

- Island wide, the proportion of buildings that are single storey (including those with roof accommodation) is 72% (30,214), whereas in the Urban Area the proportion of buildings with 2 or more storeys is 51% (6,371).

See Key Issues 5.3.1 – 5.3.4

KEY ISSUES

5.3.1 Optimum use of land and accommodation

Guernsey is a small Island. Certainly compared with its main offshore competitors, with a similar politico-geographical and economic composition, it is one of the first to come up against the limitations of space. For example, it represents 54% of the landmass of Jersey and just 11% of the Isle of Man.

Elsewhere in this paper, a number of issues have highlighted the significant pressures for development and the extent to which other limitations constrain the island's capacity to accommodate it. Simply to maintain current lifestyles and to provide, for example, enough decent housing, recreation space and economic opportunities will increase the demand for more land and accommodation. Thought needs to be given to how we can ensure we are making the most of the land and accommodation available to us whilst balancing equally the needs of all members of the community.

A strategy of targeting brown-field sites has been successfully used to accommodate a range of developments from small infill to much larger developments such as the Mixed Use Redevelopment Areas at Glategny Esplanade and Admiral Park. The Leale's Yard MURA remains undeveloped although informal proposals are being prepared and a formal planning application expected some time in early/mid 2008.

Encouraging the development of taller buildings is another way of providing more floorspace to meet demand without increasing the building footprint. Although a very high proportion of buildings in Guernsey are single storey (with or without roof accommodation), there are also a great number with two or more floors, particularly within the urban parts of the Island. Indeed, there are parts of St Peter Port where 4 and 5 storey buildings are not uncommon and the island's tallest building, Cour du Parc has 10 storeys of accommodation.

Some higher density developments within the Island have adapted a conventional 'clos-style' design approach by scaling down the development and providing each property with its own garden area, parking area and front door. This can give the impression of cramming too many buildings into too little space. However, there are now some noteworthy and indeed award winning examples in the island where relatively low density and poor quality development has been replaced by higher density developments which offer a much better living environment and makes better use of the land available.

Beyond the confines of the Island's land mass, thought could be given to creating additional land through reclamation from the sea. Such development has already been carried out, most significantly at Longue Hougue, St Sampson, where 27 acres of land will be created once the area has been completely filled with inert waste.

Key Issue 5.3.1

How can we make optimum use of land and accommodation and increase the amount of space available for occupation?

5.3.2 Distribution of development

Site coverage figures indicate that the current land use strategy has successfully concentrated development in the Urban Area while allowing the Rural Area to continue to flourish. In particular, planning policies are having an effect in directing major commercial developments to sites in and around the urban centres of Town and the Bridge.

There are a number of ways that future development can be distributed throughout the Island all of which will have some environmental impact. The current land use strategy has sought to concentrate it within the existing built-up areas through a number of methods.

Concentrating development in the urban areas brings vacant and inefficiently used land and buildings into use, it creates new opportunities for people to live and work in better designed places and provides support for community services including public transport. One of the factors which favours the concentration approach is the notion that it reduces the need to travel by car by reducing travel distances, improving opportunities to combine trips, and offering patterns of development that can be more easily served by public transport. It also means that both town and country dwellers can enjoy what is left of the countryside. However there are dangers if urban residents are forced to carry the burden in terms of a loss of local amenity space and neighbour or traffic impacts - an over emphasis on residential development can lead to a loss of urban variety and of employment sites.

It has been argued that spreading development more evenly around the island would be more equitable. But would this just add to the wholesale suburbanisation of the island, thereby degrading the overall character and attractiveness of the island? The costs of dispersal could be the loss of what little countryside is left and the impact on personal mobility with the need to access shops, workplaces and services leading to an increase in car use.

Key Issue 5.3.2

How can we ensure that the distribution of new development makes a positive contribution to the island and does not detract from the character and quality of its urban and rural environments?

5.3.3 States owned land

The effective strategic planning of States' land and accommodation can play a crucial role in facilitating new development schemes. An enlightened and proactive attitude towards asset management will help to gain the widest regeneration benefits and make the most of opportunities that may emerge. This approach will be particularly relevant for sites relating to the public realm and potential land reclamation schemes.

Where there are extensive States' land holdings (e.g. Castel Hospital and the Bouet/Chateau des Marais, a better corporate planning mechanism could assist in not only identifying development opportunities/requirements but also resolving many strategic and physical issues at an early stage. By bringing together public sector land holdings and private development interests early on in the process, the planning system can help to use States' land and property assets to lever private sector investment in various forms of community-related benefits and infrastructure.

With 10% of the Island falling within the ownership of the States of Guernsey, not all of it will be appropriate for development and it might not always offer the best location for identified States development. However, the States could consider land swaps with the private sector and/or land donations to enable the right development to take place in the right place and equally to enable environmental enhancement and meet social needs.

The appropriate protection and management of States-owned open land and valuable buildings will be an essential component in the maintenance of high quality open space and physical environment.

The framework for rationalising States' land and property assets will be addressed by the forthcoming States Property Rationalisation Strategy (identified in the Government Business Plan – Operational Plans Supplement, July 2007). The new Planning Law will bring States development within the planning system and supersede the formal consultation procedure that was established by States resolution in 1991.

Key Issue 5.3.3

How can we provide a framework for the effective strategic planning of States' land and accommodation, especially where extensive States land holdings could contribute to wider planning objectives?

5.3.4 Under-used and vacant accommodation

There is some evidence of inertia and inefficiency in the commercial land and property market, which means that some land and property is being under utilised. There are a great many reasons for this. In some cases the beneficial owner is simply not interested in realising the full development potential of the property, in others the owner may be daunted by the prospect of obtaining the necessary permissions, undertaking the work and managing tenants.

Studies of the central areas of Town, focussing on the Mill Street/ Mansell Street 'old quarter', have revealed the potential to rehabilitate and refurbish under-used and vacant accommodation. There are also some examples of successful attempts to reintroduce living accommodation into these areas, such as the celebrated Cour du Bordier development.

The combination of fewer visitors and a shorter length of stay has seen some obsolete hotel sites usefully redeveloped to provide much needed residential and commercial accommodation.

A recent survey of the potential for new industrial development on brownfield sites found several areas where the existing haphazard and inefficient use of sites provided opportunities for redevelopment to accommodate new business enterprises.

The recent trend towards mergers in the financial services industry and the consolidation of firms on single large floor-plate sites has released secondary and intermediate accommodation. Some of the space has been refurbished and re-let to the burgeoning business services sector, but some has been retained as disaster recovery or business continuity space. Some sites offer the potential for redevelopment to provide modern large floor-plate accommodation which would be better suited to the finance industry.

Key Issue 5.3.4

How can we encourage the rationalization and re-use of under-used or vacant accommodation?

5.4 Habitats and landscapes

GENERAL SITUATION

The island's rich biodiversity is evidenced by a high number of natural habitats. Fragments of threatened wet meadow habitat are managed for their display of Heath Spotted, Common Spotted, Loose-Flowered (which does not occur in the UK), and Southern Marsh orchids, which may be seen in May each year. Le Grand Pre and the Vale Pond are primarily large reed beds, and of interest for their birds, particularly during the spring and autumn. In the fragmented woodland, warblers, long-eared owl and short-toed tree creeper breed, while wheatears and pipits rest in the dune grassland. The characteristic earth bank hedgerows are home to endemics such as Guernsey vole, greater white-toothed shrew and Guernsey fern. The inter-tidal zone supports a wide range of marine species and many species of waders. The saltmarshes of the Colin Best Reserve, plus the Claire Mare, Lihou Island and most of the Lihou Headland has been designated as a Ramsar site, indicating that it is a wetland of international importance.

KEY FACTS

- Over a half of the Island is covered in grassland (improved and amenity grassland). This compares to only 3% of the Island which is wooded.
- A review of Sites of Nature Conservation Importance (SNCIs) in the Urban Area has identified 15 areas for potential designation; however, most of the sites currently designated have declined in quality.
- Guernsey boasts nearly 2000 species of plants, which in turn support a diverse range of invertebrates.
- Since 2000, monitoring of the island's breeding bird species indicate that 25% are decreasing.
- All 11 species of breeding sea birds did well during the period 1970-1992. However, from 1992-2000 only three species continued to increase their populations. Manx Shearwater, Common Tern, Razorbill and Puffin are now under severe threat with populations decreasing by up to 78%. Shorebirds are doing very poorly; four out of ten of the commonest species are all under severe threat.
- Over a 20 year period, 60% of the commoner migrant birds arrived earlier and 30% arrived later. Three species of migratory birds overwinter in Guernsey, namely Chiff Chaff, Blackcap and Sandwich Tern.
- In the last 20 years, the average flowering dates of 19 out of 21 spring flowering plants have become earlier, 7 of which are statistically significant. Overall the mean flowering date has been one day earlier each year
- More than 130,000 trees were planted between 1992 and 2005 as part of the States Tree Planting Scheme.

  Since June 2003, the annual number of planning applications relating to tree works has more than doubled from 56 applications to 126 applications per annum.

See Key Issues 5.4.1 – 5.4.2

KEY ISSUES

5.4.1 Habitats

In 1999, a comprehensive habitats survey revealed the extent of different habitat types in the island. The Biological Records Centre maintains records on a site by site basis, but the impact of development and change on the island's habitats since 1999 is unclear and the evidence is patchy. A preliminary review of the Sites of Nature Conservation Interest in the Urban Area suggests that the affects of urbanisation combined with inappropriate or non-existent land management practices appear to be threatening some of the island's habitats. In some cases, over management through inappropriate mowing regimes, weeding or the application of herbicides and pesticides is having an effect. In other cases, a lack of management seems to be leading to colonisation by non-native species that crowd out the natural vegetation or is facilitating the uncontrolled encroachment of scrub. The long term impacts of climate change on the island's habitats are unknown, but are likely to be significant. Controlled access to and interpretation of threatened habitats may help to foster greater appreciation and awareness of bio-diversity and best management practice.

Key Issue 5.4.1

What can be done to encourage the restoration and management of threatened habitats in accordance with best practice?

5.4.2 Landscapes

Developments that respond to the underlying landscape character are more easily assimilated into the environment. For example, St Peter Port's escarpments and deeply incised valleys have been able to absorb relatively tall buildings more readily than would be the case elsewhere.

The loss of green-field sites has been largely abated in recent years, but in some respects the distinctiveness of the underlying landscape character is still being eroded. Particularly due to the removal of the previously predominant tree cover of mature Elms and the introduction of inappropriately ornamental hedges and tree/shrub planting. This general tidying and domestication of the landscape has meant that in places some relatively featureless suburban developments dominate the landscapes of the Inland Scarp and Central Plain. Nonetheless, many of these changes reflect shifting lifestyles driven by the transition from a largely land-based economy to one which is dominated by the service sector and a more leisure oriented, cash rich-time poor society.

The contribution of landscape character to local distinctiveness needs to be fully understood; this will become increasingly important as we adapt to climate change and respond to key design influences such as slope, orientation, airflows and surface water drainage.

Key Issue 5.4.2

What can be done to conserve and enhance the distinctiveness of the underlying landscape character?

5.5 Design and the built environment

GENERAL SITUATION

The Government Business Plan asserts Guernsey's independent identity, through preserving and enhancing the Cultural Heritage. Protected Buildings and Ancient Monuments are registered under specific legislation. Many composite elements of Guernsey's built environments contribute positively towards the island's unique identity. The historic town of St Peter Port is rich in architectural heritage and features. Local architecture is prevalent within the main town area, and buildings such as Elizabeth College, the Markets and St James are valued historical legacies to the Island. Many other individual buildings are of cultural, architectural and historic significance. Napoleonic and WWII Atlantic Wall fortifications are iconic features of Guernsey's coast and hinterland.

KEY FACTS

- 40% of the existing building stock was built before 1914; approximately 40% of dwellings have been erected since 1960 and are of cavity wall construction.

- In 2007, there are 1600 protected buildings and ancient monuments on the register, the number of entries has risen by less than 1% in the last decade; it is estimated that 3% of dwellings are registered as protected buildings.

- 76% of protected buildings are dwellings, 9% are commercial and 15% are agricultural.

- 20% of protected buildings date from before C17, 10% date from C17, 25% from C18, 43% from C19 and 3% from C20.

- Over 500 applications for listed building consent are received annually of which 90% are approved.

- Complete demolition of a protected building is rare; however, applications for partial demolition are on the increase and affect 8% of all listed building applications in a year.

- An on-line poll of 172 people shows that Sir Charles Frossard House is the most disliked building (32%) and the Airport Terminal is the most appreciated building (31%). The development at Admiral Park is liked and disliked in almost equal measure (12% and 16% respectively). Three times as many people dislike the new Court building as like it (9% and 3% respectively), whereas Royal Place appeals to three times as many people as it offends (10% and 3% respectively). No-one likes the Tudor House development.

  A study of 11 housing developments in the urban area based on the Building for Life criteria found that 55% of schemes were below average with scores of 9 or less out of 20; while only two developments scored above 14 points, which is considered good practice, raising questions of the value of new buildings for occupants and the community in general.

See Key Issues 5.5.1 – 5.5.3

KEY ISSUES

5.5.1 Cultural heritage

Over the past 15 years, most of the substantial new developments have been concentrated in the urban areas and particularly on previously developed land. It is evident across the whole island that increasing affluence has been reflected in the improvement, renovation and adaptation of older buildings. Individually and cumulatively, these developments have had a significant impact on their immediate settings and on the island's character generally.

Development and change also affects the island's cultural heritage in terms of archaeology, monuments, and buildings of architectural and historic significance and areas of important townscape character. In some cases, irreplaceable cultural and historic assets have been lost forever or altered radically. Whilst the social and economic causes of these changes may be understood, the measure of support for managing these forces in order to conserve the island's heritage is less clear. On the one hand the island cannot be preserved in aspic nor can it be overly nostalgic about its past, on the other hand, what is preserved, why it matters and how it informs the way the island manages and supplements its cultural heritage, needs to be better understood.

There has been no structured audit of development and change in the built environment - or any evaluation of whether development and change has been for the better – so much voiced opinion is down to people's perceptions with some modern developments both lambasted and applauded in equal measure. In shaping new environments for the future, as well as conserving what is of value from the past, an appreciation is needed of what is critical to preserving the island's cultural identity and its local distinctiveness.

Key Issue 5.5.1a

What is the value of investing in heritage as a driver for positive development and urban change and as a key contributor to sustainability?

Key Issue 5.5.1b

How can we balance the need to preserve and enhance the island's cultural heritage with the need to accommodate development and change?

5.5.2 Quality of new buildings

In Guernsey, there is a strong movement towards preserving the identity of the island, whilst allowing development to meet the needs of the population. Although most new developments are able to integrate and complement traditional building forms, height, scale and materials, the quality of much new development appears to raise questions of sustainability in social, economic and environmental terms. New development should promote or reinforce local distinctiveness whilst encouraging design innovation. The best schemes are usually those that recognise the individuality of a place, and either tailor standard solutions or create particular and original architecture for that site. The impact of sustainable building standards with the technologies required to deliver lower, low or zero carbon emission properties is gaining increasing attention and will need careful consideration.

Key Issue 5.5.2

How can the quality and sustainability of new buildings be improved in terms of design, construction and integration with the built and natural environment?

5.5.3 Quality of the public realm

Despite the fact that the built and natural environment in Guernsey is of relatively high quality, our public open spaces and thoroughfares - the public realm - lack quality, cohesion and inclusiveness. This is illustrated by the poor quality of major civic environments such as the harbours in both St Peter Port and St Sampson. It is important to understand the community benefits of a safe, attractive and well cared for public realm.

In some recent developments, more attention has been given to roads and car parking than to the arrangement of the buildings and the quality of the spaces created between them. Rigid application of highway engineering standards for roads, junction separation distances and turning circles can create an environment which is unappealing and difficult to use, especially for pedestrians.

Key Issue 5.5.3

How can we improve the quality, cohesion and inclusiveness of public open spaces, such as streets, squares and parks in the urban area?

6 FINANCIAL

6.1 Taxation and capital expenditure

GENERAL SITUATION

Taxation and capital expenditure are significant issues for business confidence and the quality of life in general. The introduction of the zero-ten corporate tax policy in 2008 represents a significant loss of States revenue. As a result, capital expenditure will be strictly limited. The way in which the States manages and accounts for its fixed property assets should be seen as very much a part of the larger land and property picture.

KEY FACTS

- The YBG's annual Business Trends Survey (2006) showed that the most significant factors under States control affecting business confidence were Taxation (41%) and Capital Expenditure (14%).
- The net loss of government revenue as a result of the introduction of zero-ten is predicted to be £25 million at the end of 2009.
- Real Capital Expenditure (CapEx) has varied year on year: from £50 million in 2005 to £42 million in 2006 and an expected £58 million in 2008.
- The estate for which the States is responsible is valued at somewhere in the order of £1.8bn.
- The revised TRP proposals (2008) will raise an additional £3.9 million per annum.
- Focusing on the use of planning covenants for the delivery of affordable housing, the ERM report (2006) estimated that planning covenants could secure on-site provision of up to 44 affordable dwellings per annum (20% intermediate and 10% social) and financial contributions in lieu of on-site provision amounting to £1.55 million per annum.

Key Issues 6.1.1

KEY ISSUES

6.1.1 Linking public and private sector investment decisions

Under-investment in strategic infrastructure and in the public realm could seriously impact on the capacity to cope with development and change and could undermine private investor confidence. There may also be knock-on effects in terms of, skills shortages and crime and disorder. Filling the funding gap for upgrading our infrastructure and improving the public realm will require innovative approaches to public finance. We need to consider smart finance initiatives, so that capital expenditure and public assets can be used to lever in private finance.

Given the depth of local finance expertise, and the extent to which the corporate tax burden has been lifted, there may be scope to tap the finance industries capacity to support close-ended funds, investment trusts and bonds tied to Special Purpose Vehicles and/or scope to levy tax increments.

The new system of TRP provides an opportunity to capture the uplift in value of Approved Development Sites. For example, the tariff for an Approved Development Site is five times higher than the tariff for a domestic garden. In addition, where the footprint of a new building exceeds the original footprint of any buildings on a site, a further tax increment will be levied.

A report by ERM consulting services (Billet d'État XXV, 2007), examined the use of planning conditions and covenants to secure benefits in kind, ensure delivery/compliance and regulate future use and management. The report recommended the use of covenants to facilitate transfers of land and secure financial payments to the exchequer.

Key Issue 6.6.1

How can we tap the potential to achieve sustainable economic growth by harnessing the link between public decisions to invest in new infrastructure and private decisions about funding new development?