P.2022/26

THE STATES OF DELIBERATION
of the
ISLAND OF GUERNSEY

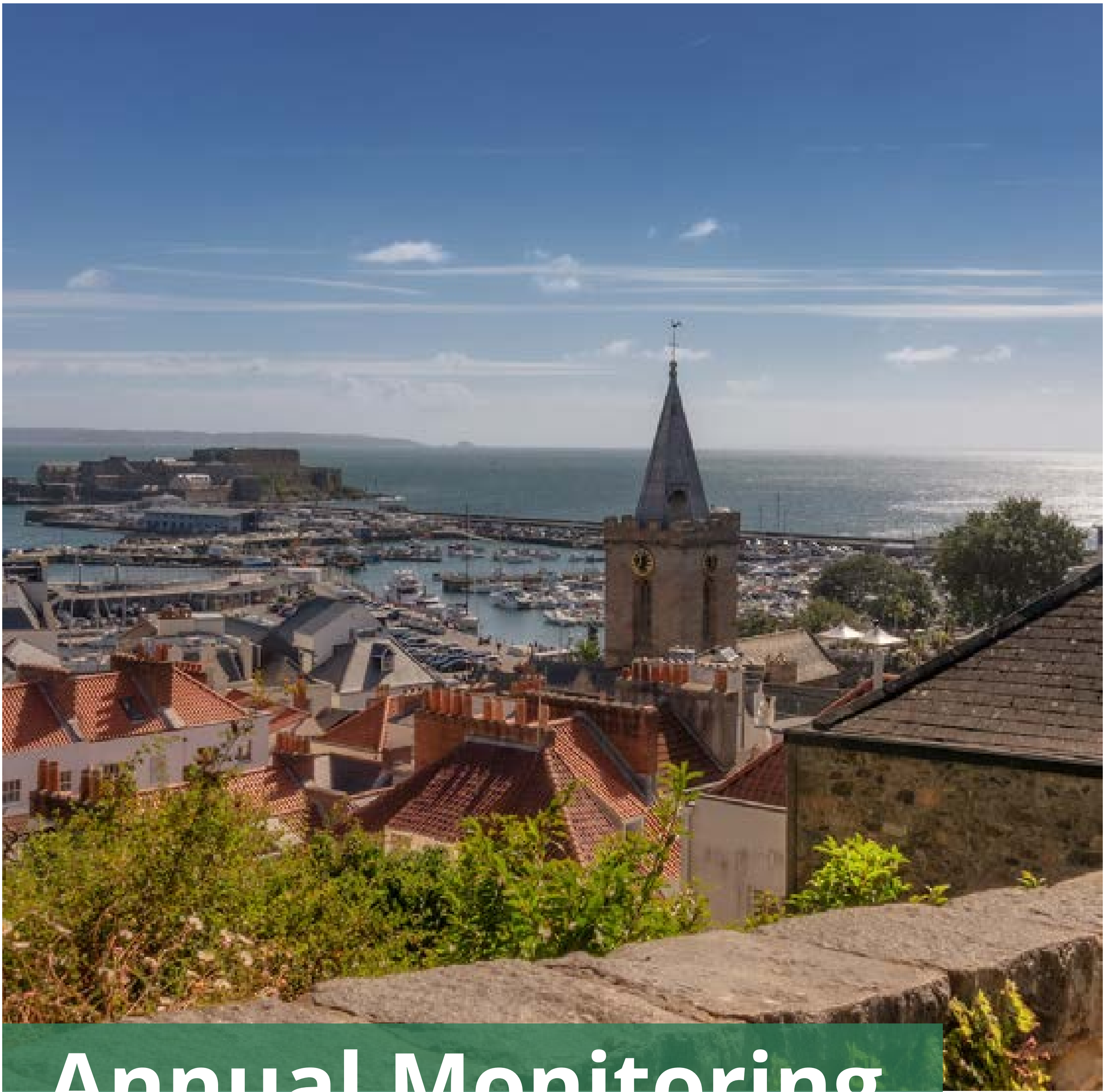
DEVELOPMENT & PLANNING AUTHORITY

ISLAND DEVELOPMENT PLAN - ANNUAL MONITORING REPORT 2020

Pursuant to Rule 20(5) of the Rules of Procedure of the States of Deliberation and their Committees, the States are asked to decide:-

Whether, after consideration of 'Island Development Plan - Annual Monitoring Report 2020', they are of opinion:-

1. To take note of the Report.



Annual Monitoring Report 2020

States of Guernsey

Contents

Executive Summary

Introduction

This document is the Island Development Plan (IDP) Annual Monitoring Report (AMR) for 2019 and 2020. The IDP was prepared by the Development & Planning Authority (DPA) and was formally adopted by the States in November 2016. The IDP manages the Island's physical and natural environment by putting in place policies which ensure that development is carried out in such a way as to deliver the social, economic and environmental objectives of the States of Guernsey, in so far as they relate to land use. The IDP provides the policy framework for the determination of planning applications, enables suitable development on appropriate sites, looks to conserve and enhance the best of Guernsey's physical and natural environment and helps to guide public and private investment in relation to land planning.

The AMRs include analysis of decisions on planning applications and appeals during the year and the findings of surveys and research carried out by the Planning Service and data collected from other States Committees in order to assess the continued effectiveness of the policies in the IDP in delivering the objectives of the States. The reports aim to provide a statistical basis for future reviews of the IDP with an analysis of any trends. The AMRs can recommend amendments to the IDP if policies are no longer effective and relevant. Ongoing monitoring enables the IDP to adapt to changing circumstances. Monitoring of the IDP is a statutory requirement on the DPA.

Government Work Plan

The IDP has a 10-year lifespan. Although there is regular monitoring throughout its life, the IDP sets out that there will be a review of housing land supply and employment land supply after five years, unless monitoring indicates a more urgent need to review the land supply sooner. As a result of the emergence of the COVID-19 pandemic, the States resolved to pause the 5-year review so that it could review the scope of, and priorities for, the 5 year review of the IDP and to incorporate the government's priorities for the Island's recovery. These priorities have now been established in the Government Work Plan (July 2021). Their implications for the IDP need to be reviewed and taken into account in future monitoring, to ensure that the IDP fully supports the government priorities. In addition, States approved policies such as the Climate Change Policy & Action Plan and the Energy Policy 2020-2050 will also need to be reviewed.

Strategic Development and Infrastructure

The policies of the IDP that relate to strategic development and infrastructure support the States' priorities as set out in the Government Work Plan. Regeneration is a critical recovery action and the policies provide a positive and supportive framework to bring forward co-ordinated and comprehensive plans for the Seafront Enhancement Area and Regeneration Areas while managing development proposals in the meantime. The implications for the IDP of any future States decisions regarding air links and the supply of aggregates need to be kept under review. A Development Framework for the 3 Regeneration Areas in St Peter Port has been progressed and a draft has been published for public consultation at the time of writing. A Development Framework for Leale's Yard was approved by the Development & Planning Authority in May 2020.

Housing

The policies support housing development of all tenures in appropriate locations. There has been a consistent level of permissions, and completions of dwellings, to help meet housing need. **162** dwellings (**162** private market, **0** Affordable Housing) were approved in 2020. In total there is planning permission for **540** dwellings (**489** private market, **51** Affordable Housing) of which **355** (**304** private market, **51** Affordable Housing) are under construction. This is known as the 'pipeline supply'. Since the adoption of the IDP **440** dwellings (**291** private market, **149** Affordable Housing) have been completed. The majority of completed dwellings have been either in the St Peter Port Main Centre or Outside of the Centres. **39%** of completed dwellings since the adoption of the IDP and **30%** of the pipeline supply are located Outside of the Centres. The implications for the spatial strategy of the level of housing development Outside of the Centres needs to be kept under review. The decreasing level of permissions for Affordable Housing also needs to be kept under review. The Planning Service have been supporting the project to update the States Strategic Housing Indicator.

Offices

During 2019 and 2020 a total of **38** planning permissions relating to office accommodation were decided. **23** permissions related to a loss in floorspace and were typically associated with a change of use from small scale office accommodation (under 250m^2) to residential dwellings, primarily in St Peter Port. **15** permissions were granted for a gain in floorspace and were typically associated with a change of use from small scale areas (under 250m^2) to office spaces, also primarily in St Peter Port. Given the level of uncertainty post Brexit and the Covid-19 pandemic, it is difficult to predict the future requirements for office space and we need to develop a better understanding of the optimum office portfolio. Agile working and improvements in technology and establishment of digital strategies may reduce the overall demand for new space. Overall, there is a need to provide a range of different sizes and quality of accommodation within the portfolio to meet differing business needs. In 2020, the Authority commissioned Watts Property Consultants Ltd to prepare an Office Quality Audit. Following consultation with stakeholders, the report provides a definition of primary, secondary and tertiary office accommodation in Guernsey and an assessment of the quality of the existing stock within St Peter Port Main Centre. **11** premises (**48,571m^2**) are classified as Prime, **80** premises (**91,338m^2**) as Secondary and **160** premises (**55,931m^2**) as Tertiary.

Industry and Storage

During 2019 and 2020 a total of **20** planning permissions relating to industry, storage & distribution premises were decided. **7** permissions related to a loss in floorspace, covering a range of **-39m^2** to **-730m^2** which included demolition and replacement by residential dwellings and change of use to offices and public amenity. **13** permissions were granted relating to a gain in floorspace, typically below 1,000m^2. Planning permissions granted over 2019 and 2020 resulted in an increase in floorspace and land, although it is important to note that large floorspace permissions related to storage & distribution rather than industry. As seen in previous years, the majority of the gains in 2019 and 2020 can be attributed to a few large sites (in particular the Domarie & Avondale Vineries on Oatlands Lane). The original Employment Land Study, 2014 stated that the Island has an overprovision of industry, storage & distribution space and over the 10-year life of the IDP there will be a continuing decline in need for such space. The overall gain of space in 2019 and 2020 is in marked contrast to this and is noted accordingly. The implications for the spatial strategy of the level of industry, storage & distribution development Outside of the Centres needs to be kept under review.

Visitor Accommodation

The policies of the IDP continue to support enhancement of existing establishments and new visitor accommodation. There were **33** planning permissions relating to visitor accommodation establishments in 2019 and **27** in 2020. The majority relating to works to existing hotels. There has been only a small increase in the number of inactive establishments. There were **150** establishments in 2020 (down from **165** in 2017). The Government Work Plan recognises that the COVID-19 pandemic has had a significant impact on tourism. The implications for the IDP of the proposed new Tourism and Accommodation Strategy for policies that relate to visitor accommodation and the tourism offer needs to be kept under review.

Agriculture & Horticulture

The planning policy framework continues to prioritise agricultural use within the Agriculture Priority Areas (APAs) where that falls within the remit of the planning system. There were **32** planning permissions within APAs in 2020 and **39** in 2019. There were **59** planning permissions on agricultural land outside APAs in 2020 and **78** in 2019. Where a change in the use of land was approved within APAs, this involved approximately **21,745m^2** of land (**2.17 hectares** or **13 vergées**) in 2019, and **16,530m^2** (**1.6 hectares** or **10 vergées**) in 2020. Of this, approximately **20,475m^2** of agricultural land gained approval to change use to domestic garden in 2019, and **12,800m^2** gained approval to change use to domestic garden in 2020. Applications for the change of use from agricultural land (but not necessarily actively farmed land) to domestic garden and the need for a revised figure of land required by the commercial agricultural industry to support the industry long-term need to be kept under review. A list of considerations for development proposals within APAs which are not for agricultural purposes has been published on the States' website. The IDP policies are supporting change in the horticultural industry, for example supporting the growth of the medicinal cannabis sector, as well as supporting diversification on farms.

Redundant Glasshouse Site

The IDP provides some opportunity to incentivise the removal of redundant glasshouses by allowing a change of use. There have been **46** planning permissions granted for redundant glasshouses sites under the IDP. The majority of permissions have been for conversion to dwelling including curtilage or small-scale storage/industry. The total area of redundant glasshouse sites is **75.5** hectares, down from **80.6** hectares in 2017. **16** planning applications have been refused. The monitoring has found that planning policies have prevented the change of use of redundant glasshouse sites, which are legally considered an agricultural use, within and adjacent to APAs so that agricultural use in the APA is prioritised where required in accordance with the IDP policies.

Natural Resources

There are a number of Government Work Plan recovery actions that relate to natural resources. These will need to be reviewed in future monitoring to consider whether the policies of the IDP that relate to natural resources remain appropriate to support the Government priorities. There is potential for a biodiversity net gain planning tool to implement the proposed green and blue economy supporting plans. A survey of the Areas of Biodiversity Importance has been initiated. This project is due to be completed by the end of 2021. There was a noticeable increase in permissions for renewable energy equipment in 2020 with **39** permissions compared to **28** in 2017, **25** in 2018 and **23** in 2019. Air source heat pumps and solar panels on domestic buildings accounting for most permissions.

Construction Waste

A similar proportion of planning applications each year (2017-2020) have been required to submit a Site Waste Management Plan (SWMP). There is some emerging evidence to suggest that quality of submissions needs to be standardised and whilst the publication of a SWMP Advice Note in 2018 has resulted in the improvement of submissions generally, there are still submissions that are not up to standard. **122** SWMPs have been submitted (2017-2020). **41%** of residential permissions submitted a SWMP in 2020. An issue to keep under review is capturing a greater level of data on construction waste through SWMPs, in particular for certain types of residential development.

Conclusions

In 2019 and 2020 there was a high rate of approval of planning applications (only **131** applications were refused out of **3,081** applications determined, representing **4.3%** - a small increase from 2018) and only **4** appeals against refusal of planning permission were decided during 2019/2020, **2** of which were allowed and **2** dismissed. This illustrates how the positive and flexible policies of the IDP, along with encouragement of high-quality pre-application discussions (**1,500** pre application enquires were answered in 2019/2020), have enabled positive outcomes to be reached for the vast majority of planning applications, and potentially costly appeals avoided.

The AMR has identified a small number of issues where emerging trends need to be kept under review, including, in some instances, the need for further research prior to any future review of the IDP. In the previous AMRs, a number of issues were identified where action was needed. Many of these actions have been resolved (see Appendix 1) including for example the publication of guidance, such as for Development Frameworks.

The AMR for 2020 has found that the IDP policies are generally performing as intended and contributing towards delivering the Strategic Land Use Plan (2011) and therefore, at this time, there is no immediate requirement to amend the IDP and there is no evidence of a need to amend the Strategic Land Use Plan.

The implications of the new priorities that have been established in the Government Work Plan (July 2021) for the IDP need to be reviewed to ensure that the IDP fully supports the government priorities. Emerging strategies, projects and policy decisions will require to be closely monitored to assess whether this would necessitate commencing a review of the IDP, in advance of the replacement of the IDP in 2026.

Housing

162
Dwellings were approved in 2020

162 private market
0 Affordable Housing

Total planning permission for
540
dwellings

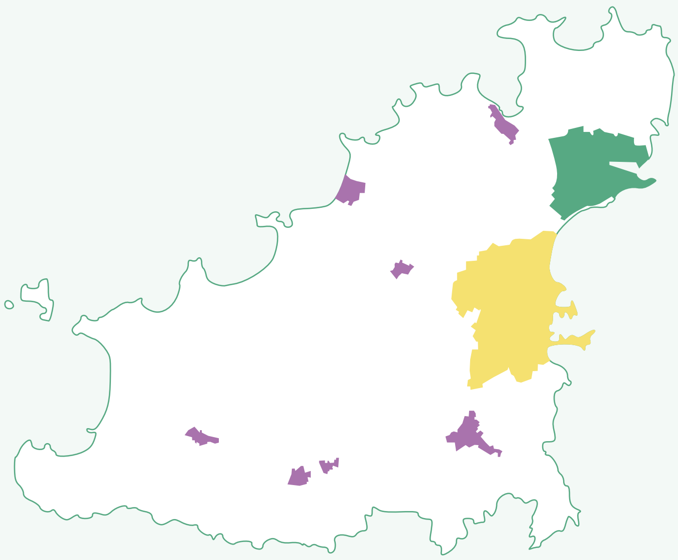
489 private market
51 Affordable Housing

of which
355
are under construction

304 private market
51 Affordable Housing

Since adopting the IDP
440
dwellings have been completed

291 private market
149 Affordable Housing



47% of completed dwellings located in the St Peter Port Main Centre

11% of completed dwellings located in the St Sampson / Vale Main Centre

3% of completed dwellings located in Local Centres

39% of completed dwellings located Outside of the Centres

Offices

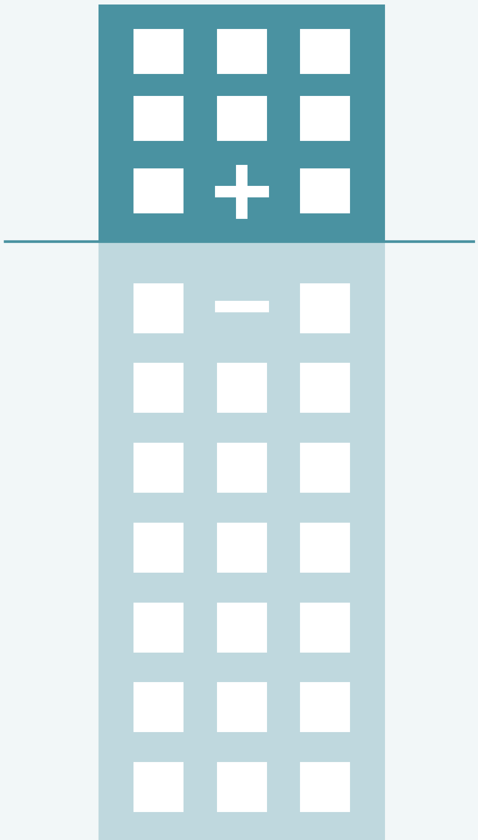
38
planning permissions relating to office accommodation were decided in 2019 and 2020

11
premises **(48,571m²)** are classified as **Prime**

80
premises **(91,338m²)** are classified as **Secondary**

160
premises **(55,931m²)** are classified as **Tertiary**

15 permissions were granted for a gain in floorspace



23 permissions related to a loss in floorspace

Industry & Storage

20
planning permissions relating to industry, storage & distribution premises were decided in 2019 and 2020

13
permissions related to a gain in floorspace

7
permissions related to a loss in floorspace

Visitor Accommodation

33 planning permissions relating to visitor accommodation were approved in **2019**

27 planning permissions relating to visitor accommodation were approved in **2020**

There has only been a small increase in the number of inactive establishments.

150 in 2020

165 in 2017

Agriculture & Horticulture

Planning permissions **within APAs**

32 in 2020

39 in 2019

Planning permissions **outside APAs**

59 in 2020

78 in 2019

Change in the use of land within APAs involved approximately

21,745m²
in 2019

16,530m²
in 2020

Of this, the land that gained approval to change use to domestic garden was approximately

20,475m²
in 2019

12,800m²
in 2020

Redundant Glasshouse Sites

46
planning permissions have been **granted** for redundant glasshouse sites under the IDP.

16
planning permissions have been **refused** for redundant glasshouse sites under the IDP.

The total area of redundant glasshouse sites is

75.5 hectares in 2020

80.6 hectares in 2017

Natural Resources

There was a noticeable increase in permission for renewable energy equipment in 2020

39 in 2020

23 in 2019

25 in 2018

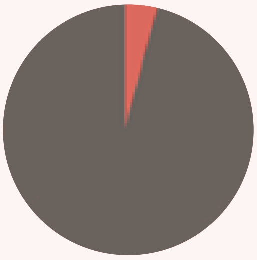
28 in 2017

Construction Waste

122
Site Waste Management Plans (SWMP) have been submitted (2017-2020)

41%
of residential permissions submitted a SWMP in 2020

Conclusions



In 2019 and 2020 there was a high rate of approval of planning applications. Of **3,081** applications, only **131** were refused **(4.3%)**

Only **4** appeals against refusals were decided during 2019 and 2020, **2** of which were allowed and **2** dismissed.

1,500 pre application enquiries were answered in 2019 and 2020.

Section 1

Introduction

This document is the Island Development Plan (IDP) Annual Monitoring Report (AMR) for 2019 and 2020. This is the third AMR for the IDP. This AMR has a different look to previous reports as it focusses on monitoring and reporting on those policies which most support delivery of current States' priorities and it aims to be more user-friendly.

1.1 What is the Island Development Plan?

The IDP was prepared by the Development & Planning Authority (DPA) and was formally adopted by the States in November 2016. The IDP manages the Island's physical and natural environment by putting in place policies which ensure that development is carried out in such a way as to deliver the social, economic and environmental objectives of the States of Guernsey, in so far as they relate to land use. The IDP provides the policy framework for the determination of planning applications, enables suitable development on appropriate sites, looks to conserve and enhance the best of Guernsey's physical and natural environment and helps to guide public and private investment in relation to land planning.

1.2 What is an Annual Monitoring Report?

The AMRs include analysis of decisions on planning applications and appeals during the year and the findings of surveys and research carried out by the Planning Service and data collected from other States Committees in order to assess the continued effectiveness of the policies in the IDP in delivering the objectives of the States of Guernsey.

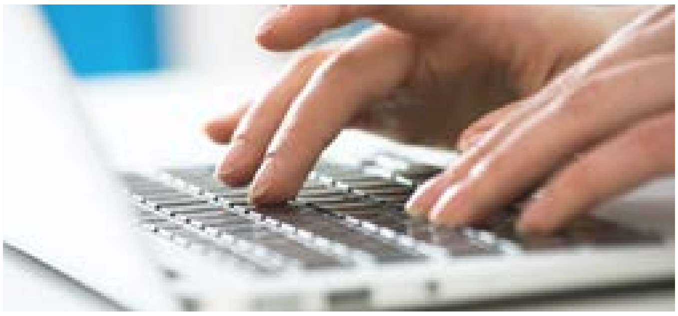
1.3 Why monitor the Island Development Plan

The reports aim to provide a statistical basis for future reviews of the IDP with an analysis of any trends. The AMRs can recommend amendments to the IDP if policies are no longer effective and relevant. Ongoing monitoring enables the IDP to adapt to changing circumstances. Monitoring of the IDP is a statutory requirement on the DPA.

1.4 Where can I find out more

Information on the IDP and Supplementary Planning Guidance is available online on the States' website here: gov.gg/planningpolicy. Research and technical evidence reports are available here: gov.gg/amr. This includes IDP Annual and Quarterly Monitoring Reports, Main Centres Surveys, Local Centres Surveys and updates to the Employment Land Study.

The States publishes a range of statistical reports many of which include data of relevance to the IDP. These reports are available here: gov.gg/data.



The Planning Service publishes reviews of performance against targets for the speed of decisions on planning applications. The performance statistics are available here: gov.gg/planningperformance

1.5 How can I keep-in-touch for updates?

If you would like to be kept up to date with progress with the implementation of the IDP including the publication of any documents such as Development Frameworks (guidance for the development of sites), please let us know and we can add you to the Planning Service's Plan Review database.

Further information on the work of the Planning Service, including planning applications and decisions, is available here: www.gov.gg/planningandbuilding

We would value your feedback on the Annual Monitoring Report. You can do this by contacting us using the details below.

planreview@gov.gg
01481 226200
Planning Service, Sir Charles Frossard House, La Charroterie, St Peter Port, GY1 1FH

Section 2
Strategic Development and Infrastructure

2.1 Introduction

The Strategic Land Use Plan (SLUP) highlights opportunities for regeneration within the Main Centres, with the aim of promoting and enabling development that can deliver economic, social and environmental benefits to the positive advantage of the Island as a whole. The SLUP notes that many of the opportunities identified are located on the eastern coastal areas of the Main Centres. These are areas that accommodate land which is either inefficiently used or could be put to better alternative use through the implementation of a co-ordinated strategy.

The SLUP states that modern infrastructure is vital to the Island and the ability of the planning system to enable its timely provision is an important objective of the SLUP. The IDP includes policies to deliver infrastructure projects and major developments through Harbour Action Areas, Regeneration Areas, Safeguarded Areas and Airport Land.

2.2 Harbour Action Areas

The Harbour Action Areas (HAAs) have potential for significant development. The HAAs embrace extensive areas within and around the St Peter Port and St Sampson harbours recognising that in addition to vital operational activities that take place within the ports these are areas with significant potential to be developed and used to meet the economic, social and environmental objectives of the States.

IDP Policy MC10: Harbour Action Areas notes that detailed strategies for the development of the St Peter Port HAA and the St Sampson's HAA will be provided in a Local Planning Brief for each area when approved by the States of Guernsey. In the meantime, the policy supports proposals where they are of a minor or inconsequential nature or do not prejudice the outcomes of the Local Planning Brief process.

53 planning permissions in 2019 and 29 in 2020 were approved in HAAs. All of these planning applications were assessed for the potential impact on the delivery of the comprehensive

master-planning and redevelopment of the harbours and found not to prejudice the outcomes of the Local Planning Brief process.

A Seafront Enhancement Area (SEA) programme was initiated in 2017 to develop and co-ordinate policies and develop a masterplan for the development and enhancement of the east coast of Guernsey including St Peter Port and St Sampson's HAAs. A political Steering Group was formed to co-ordinate the SEA programme. The Group agreed a series of enhancement objectives and principles and identified six States-owned sites along the St Peter Port seafront as shorter-term initial enhancement projects. Progress has been made on the regeneration of the La Vallette area and use of the Round Top site in St Peter Port Harbour.

The Government Work Plan includes a recovery work stream to 'Enable opportunities for regeneration'. Progress with the associated recovery actions will need to be taken into account in future reviews of the IDP policies to ensure that they continue to support delivery of the States priorities. A critical recovery action for the first 6 months is to 'establish a development agency and enable work to begin on the development of the seafront masterplan'. In addition, following debate of a policy letter in June 2021 'Future Harbour Development', the States resolved to direct the States' Trading Supervisory Board to submit a policy letter for a scheme to develop within St Peter Port Harbour a 'Pool Marina', to direct the Policy & Resources Committee to establish a Development and Regeneration Board to replace the interim sub-committee established by the Committee to advise it on the development of the SEA and to direct the Policy & Resources Committee to submit a policy letter to detail the work of the Development and Regeneration Board and steps towards a seafront masterplan.

Progress with work on the SEA and the implications for the HAAs will be kept under review and will need to be taken in consideration in future reviews of the IDP policies. An extant States' resolution from 2020 is to direct the Authority to prepare proposals for a Local Planning Brief for the St Peter Port HAA. However, this cannot be progressed until direction is given in the wider SEA masterplan.

INDICATOR

Delivery of Local Planning Briefs for the Harbour Action Areas of St Peter Port and St Sampson informed by a strategic plan for the Seafront Enhancement Area.

PROGRESS

Work has not yet started on Local Planning Briefs for the Harbour Action Areas.

2.3 Regeneration Areas

Regeneration Areas are areas where a co-ordinated and flexible approach to planning of mixed-use development can achieve significant new sustainable place making, attracting inward investment and making improvements to and enhancement of the public realm and historic environment. The Regeneration Areas are located at South Esplanade and Mignot Plateau, Lower Pollet and Le Bordage/Mansell Street in St Peter Port and Leale's Yard at the Bridge in St Sampson / Vale.

IDP Policy MC11: Regeneration Areas requires a Development Framework for the Regeneration Areas prior to their redevelopment. In the meantime, the policy supports proposals where they are of a minor or inconsequential nature. 16 planning permissions in 2019 and 9 in 2020 were approved in Regeneration Areas. Given the policy context of the IDP, none of these permissions were for development of any significant scale.

A project is ongoing to produce a Development Framework for the three St Peter Port Regeneration Areas. A Development Framework for the Leale's Yard Regeneration Area was approved by the DPA in 2020.

The Frameworks set out the potential of the areas including opportunities for significant new sustainable place making, improvements to and enhancement of the public realm and historic environment, all of which will sustain the vitality of the Main Centres and ensure that they remain attractive places in which to live, shop, work and spend leisure time.

The Government Work Plan includes a recovery work stream to 'Enable opportunities for regeneration'. Actions include 'Complete Development Frameworks for all Regeneration Areas' and 'Conclude appraisal of government involvement in developing Leale's Yard'.

INDICATOR

Delivery of Development Frameworks for Regeneration Areas.

PROGRESS

Development Framework for Leale's Yard approved in 2020. A draft Development Framework for the 3 Regeneration Areas in St Peter Port published in 2021.

2.4 Safeguarded Areas

IDP Policy IP5: Safeguarded Areas states that Safeguarded Areas shall be protected from any development that may compromise their future implementation for strategically important development. Three areas are designated on the Proposals Map as Safeguarded Areas:

- **Chouet Headland for possible mineral extraction;**
- **Les Vardes Quarry for possible water storage; and,**
- **Land to the east of airport land for a possible runway extension.**

The were no permissions in 2019 in Safeguarded Areas and only 1 permission in 2020. This was to install 3 antenna units to an existing telecommunications mast.

Policy IP5 says that a Development Framework may be required prior to development within a Safeguarded Area. Work began in 2017 on preparing a Development Framework for the Chouet Headland in relation to possible mineral extraction and a draft was published for consultation in April 2019. There has been no requirement to progress Development Frameworks for the other Safeguarded Areas.

The continued need for these sites to be safeguarded including the possible use they are safeguarded for, will be kept under review as will progress with the projects to use the land in relation to IDP Policies. If the sites are not needed for the identified safeguarded use other uses could be considered, if appropriate.

The Government Work Plan includes recovery actions to 'Determine the future aggregate supply policy' which will be debated in autumn 2021 and 'Determine the future strategic use of Les Vardes' which will need to be taken into account in any future review of the IDP policies. In addition, the resolutions to a policy letter 'The Island's Future Aggregate Supply' (June 2021) will need to be taken into account and will have implications for both Les Vardes and Chouet. Policy IP5 may require to be amended depending on these policy decisions.

2.5 Airport Land

IDP Policy IP4: Airport Related Development supports proposals relating to the operation or safety of the airport where they would ensure the continued effective, efficient and safe operation of the airport. The policy also supports proposals for development associated with airport related uses on 'Airport Land' (shown on the IDP Proposals Map), immediately adjoining Airport Land or within close proximity to Airport Land subject to a range of criteria.

There were 4 planning permissions at the airport in 2019 and 1 in 2020. These included a permission for a new storage unit and the remainder were for minor forms of development.

The Government Work Plan includes a recovery action to 'Conclude Guernsey Airport runway extension decision'. In addition, a masterplan for the Airport is being developed. These actions and any resolutions thereafter will need to be taken into account in any review of the IDP policies.

2.6 Conclusions

At present the policies of the IDP referenced above support the States' priorities as set out in the Government Work Plan. Regeneration is a critical recovery action and the policies provide a positive and supportive framework to bring forward co-ordinated and comprehensive plans for the SEA and Regeneration Areas while managing development proposals in the meantime. Delivery of a Local Planning Brief(s) for HAAs will be an important workstream to support the Government Work Plan.
IDP policies safeguard areas of strategic importance to States' priorities for air links and the supply of aggregates in advance of policy decisions. Policy IP5 may require to be amended depending on these policy decisions.

Section 3
Housing

3.1 Introduction

The IDP has a Plan Objective to 'ensure access to housing for all' and generally supports the development of new dwellings in the Main Centres, Main Centre Outer Areas and Local Centres. New dwellings are also supported Outside of the Centres, in certain circumstances, through sub-division of existing dwellings or through conversion of redundant buildings. This is in accordance with the spatial strategy of the SLUP.

A number of recovery actions included in the Government Work Plan in 2021 relate to housing and will need to be taken into account in any future review of the IDP policies. Recovery actions include developing and seeking States' approval for the States Strategic Housing Indicator, establishing a (political) Housing Action Group, creating an Affordable Housing Development Plan and actions relating to accommodation for elderly people and key workers. A critical recovery action for the first 6 months is to scope and deliver urgent measures necessary to address housing pressures.

3.2 'Pipeline' Housing Supply

The SLUP requires the Authority to demonstrate, through regular monitoring, that there is a maintained minimum 2-year supply of housing permissions within the 'pipeline' that is able to come forward for development[1]. In July 2018, the States resolved to agree the States' Strategic Housing Indicator be set at completing 635 new units of accommodation between 2017 and 2021, with a plus or minus variance of 149 new units to give the flexibility to react to market changes. It also agreed to separate the States' Strategic Housing Indicator into an Affordable Housing Indicator (considered in more detail below) set at completing 178 units of Affordable Housing over the next 5 years with a plus or minus variance of 32 new units to give the flexibility to react to demand and market changes and a private market housing indicator of 457 new units of accommodation with a plus or minus variance of 117 new units of accommodation for the same period. This equates to an annual indicator for the completion of 97-157 additional new dwellings per year. The pipeline supply requirement is therefore planning permissions for at least 194-314 new dwellings (136-230 private market, 58-84 Affordable Housing). **Figure 1** overleaf demonstrates the number of dwellings in the pipeline at the end of 2020. **Figure 2** shows the location of development sites with planning permission in the pipeline.

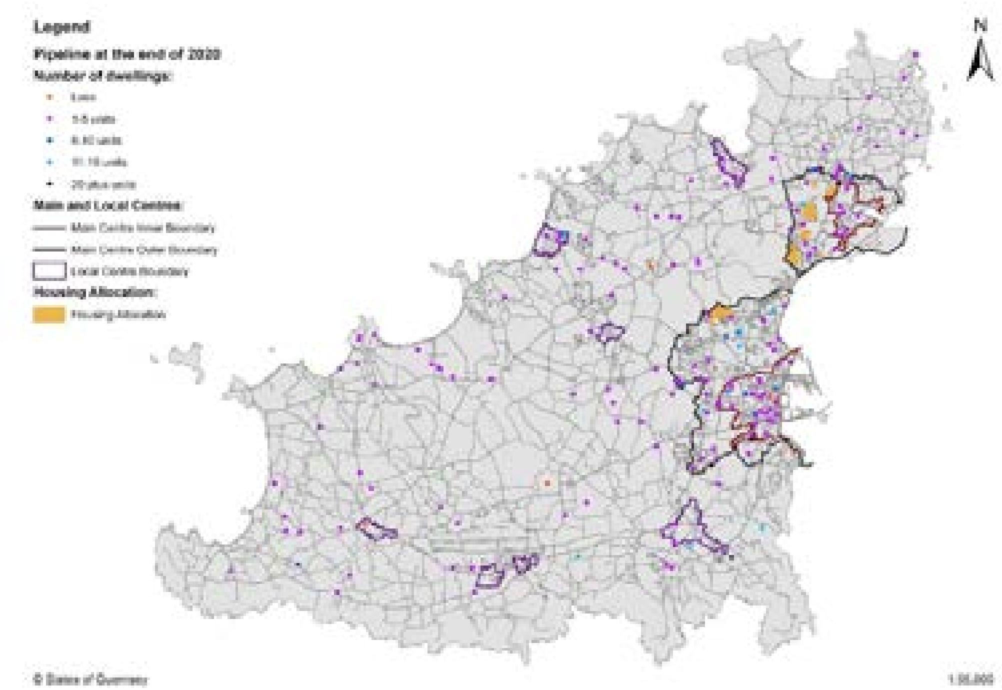
The States Strategic Housing Indicator is currently under review. When this is agreed by the States, the IDP policies for housing development will need to be re-evaluated to ensure that they continue to be able support delivery of an appropriate supply of housing.

1 Whilst the calculation of the 2 year pipeline supply is based on the Strategic Housing Indicator, which now relates to the completion of dwellings, it is used for planning purposes to provide a test to ensure there is sufficient land available and planning permissions for housing in place to meet recognised housing needs. This monitoring, alongside other research, enables the Authority to determine whether the IDP housing policies are meeting the objectives of the SLUP and whether there is a need to amend planning policies or to seek additional land for housing.

Figure 1: Pipeline Housing Supply at the end of 2020

Source of Supply - Private Market	Number of dwellings			
	Main Centres	Local Centres	Outside of the Centres	Total
Full permissions (work not commenced)	94	22	76	185
Outline permissions	0	0	0	0
Under Construction	224	15	58	304
Total	**318**	**37**	**134**	**489**
Source of Supply - Affordable Housing				
Full permissions (work not commenced)	0	0	0	0
Outline permissions	0	0	0	0
Under Construction	25	0	26	51
Total	**25**	**0**	**26**	**51**
Pipeline Supply	**540**			

Figure 2: Location of Pipeline Housing Supply site at the end of 2020



INDICATOR

A minimum 2-year supply of planning permissions for residential development that are able to come forward for development is maintained at any one time, so that there is sufficient land available to meet the annual requirements for housing need (currently 194-314 dwellings).

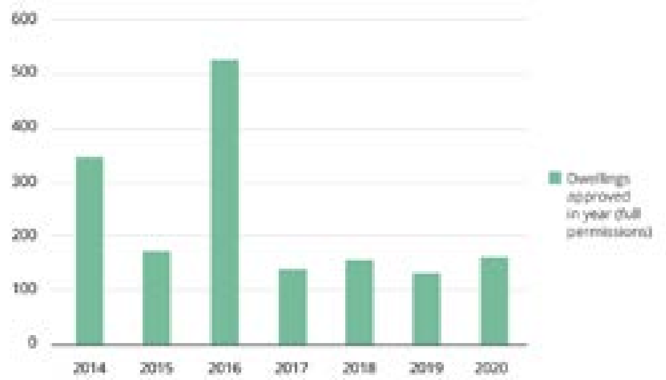
PROGRESS

2019: 594 dwellings. 2020: 540 dwellings. The pipeline supply has been decreasing since the adoption of the IDP. The pipeline supply at the end of 2016 was 1415 dwellings.

3.3 Planning Permissions in 2019 and 2020

Full planning permission was granted for a total of 162 additional dwellings (all private market dwellings) on 93 sites during 2020 (131 dwellings on 76 sites in 2019 – 130 private market and 1 Affordable Housing dwelling). This was below average for the past 5 years (233 dwellings) – see **Figure 3**. The delivery of Affordable Housing through IDP policies is considered in more detail below and will be kept under review.

Figure 3: Dwellings approved each year (excluding outline permissions)



3.4 Developments Commencing and Completed

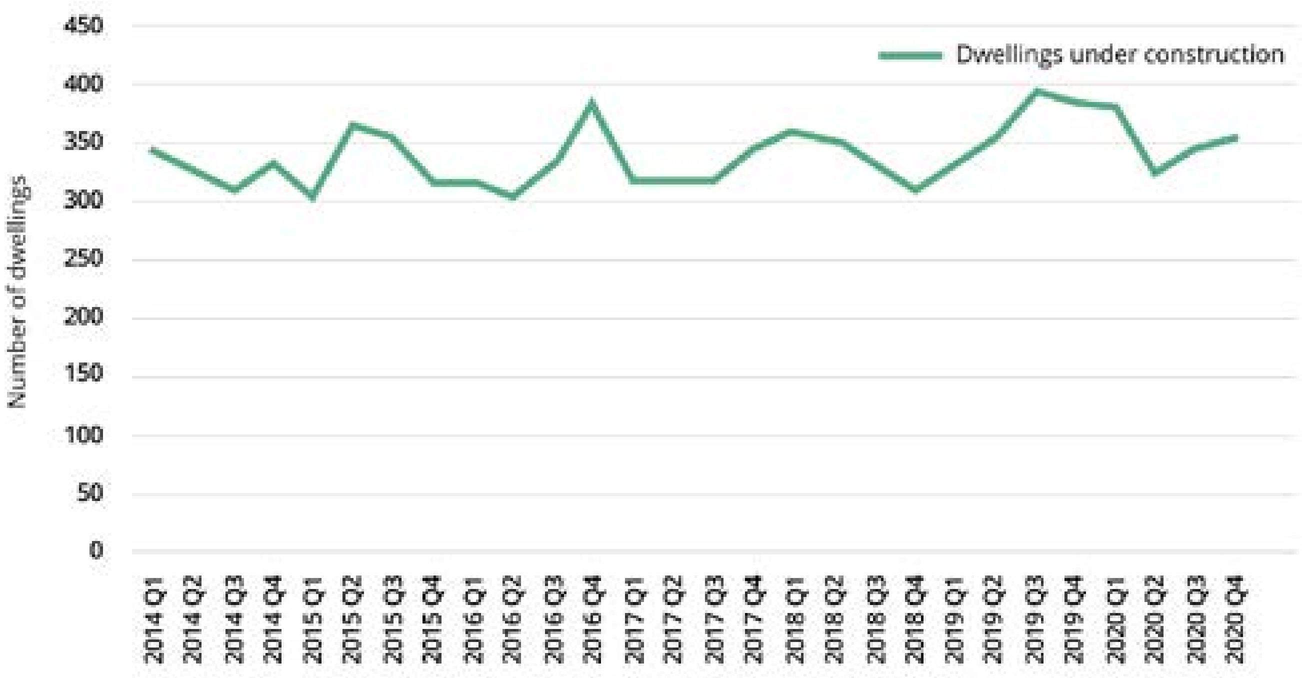
Whilst the pipeline housing supply requirement in the IDP relates only to the number of permissions granted, it is also useful to monitor how many of these permissions get built (are taken-up). **Figure 4** shows development that has commenced or was completed during 2019 and 2020 (including developments approved under previous development plans and under the IDP).

The number of dwellings under construction at the end of each quarter has remained relatively stable – see **Figure 5**. The average is 339 dwellings.

Figure 4: Developments commencing and completing

	Commencements Private		Commencements Affordable		Completions Private		Completions Affordable	
	Sites	Units	Sites	Units	Sites	Units	Sites	Units
2019	63	127	3	34	29	68	1	10
2020	46	87	2	16	30	86	4	46
Running total since IDP adoption	203	376	12	167	127	291	12	149

Figure 5: Dwellings under construction



3.5 Location of Development

The IDP Spatial Policy is to concentrate the majority of new development in the Main Centres and the Main Centre Outer Areas to maintain the vitality of these areas. **Figure 6** shows the majority of housing supply is located in Main Centres.

Figure 6: Location of development

	2019 permissions		2020 permissions		Pipeline		Completions	
	Dwellings	%	Dwellings	%	Dwellings	%	2019	2020
Main Centres	79	60%	74	46%	343	63%	53	67
Local Centres	7	5%	16	10%	37	7%	1	7
Outside of the centres	45	35%	72	42%	160	30%	24	58
Total	131		162		540		78	132

Figure 7 below assesses where new residential development has been permitted in terms of greenfield[2] and brownfield sites to monitor how effective policies are at focusing development within Centres on brownfield sites. 77% of dwellings in 2019 and 2020 combined were on brownfield sites.

2 Greenfield is open land that is not developed. Glasshouses are regarded as being greenfield sites as they are required to be treated as agricultural land under the Land Planning and Development (Guernsey) Law, 2005. Brownfield land is previously developed land and includes land within the curtilage of a building.

Figure 7: Dwellings approved in 2019 and 2020 by location and type of site

	Brownfield				Greenfield			
	Sites		Dwellings		Sites		Dwellings	
	2019	2020	2019	2020	2019	2020	2019	2020
St Peter Port Main Centre	10	11	23	29	0	0	0	0
St Peter Port Main Centre Outer Area	12	8	45	16	0	1	0	2
St Sampson's / Vale Main Centre	2	5	4	5	0	0	0	0
St Sampson's / Vale Main Centre Outer Area	2	5	2	9	1	2	5	13
Local Centres	4	4	7	5	0	2	0	11
Outside of the Centres	31	39	30	52	14	16	15	20
Total	**61**	**72**	**111**	**116**	**15**	**21**	**20**	**46**

Figure 8 shows that development is fairly evenly spread across the Main Centres and Main Centre Outer Areas and there is not a concentration of development in any one location. The largest proportion of sites are within the St Peter Port Main Centre Outer Area which includes the most land of the 4 areas assessed. 39% of completed dwellings since the adoption of the IDP and 30% of the pipeline supply are located Outside of the Centres and are through sub-division of existing dwellings or through conversion of redundant buildings. The percentage of the pipeline supply has increased from 24% in 2018. This is an issue to be kept under review to ensure the IDP continues to deliver the SLUP spatial strategy.

Figure 8: Location of residential development sites completed since the adoption of the IDP (to end of 2020)

	St Peter Port Inner Area	St Peter Port Outer Area	St Sampson / Vale Inner Area	St Sampson / Vale Outer Area	Local Centres	Outside of the Centres
Completed Sites	10	24	14	8	11	72
Completed Dwellings	51	157	29	18	14	171

3.6 Sizes of dwellings permitted

The SLUP requires the IDP to ensure that provision is effectively made to meet the annual requirement for the creation of new homes of an appropriate mix of tenures, housing sizes and types, to meet the Island's housing needs. The States' Strategic Housing Indicator is based on the findings of a report by KPMG (Guernsey Housing Market Review, 2017) that was noted by the States as a resolution to the Policy Letter 'Local Market Housing Review and Development of Future Housing Strategy' in July 2018. The KPMG report sets-out the requirement for housing by both tenure and the size of the dwelling (expressed as a number of bedrooms). The split by number of bedrooms was not expressly endorsed by the States, however it represents the most up to date information available regarding housing need.

Figure 9 below shows the split in size of private market units that is considered appropriate on sites capable of providing a mix of dwellings – this is an update to the figures in the 2017 KPMG report based on the Planning Service's analysis of dwellings completed since 2017 - and compares this with the dwellings permitted in 2020. **Figure 9** shows that overall there has been an over-delivery of permissions for 1 bed and 4+ bed private market dwellings, as was the case in 2018, and an under delivery of permissions for 3 bed private market dwellings.

Figure 9: Size of private market dwellings permitted in 2020 (net of dwellings to be replaced via the implementation of new dwellings approved) compared to identified housing need. (Note that single dwelling sites do not need to meet the requirement for dwellings sizes so may be for a 4 or 5+ bed property)

Size of unit	Appropriate % of units required	% of units permitted
1 bed	20-21%	35
2 bed	40-41%	39
3 bed	39%	18
4 & 5+ bed	0%	9

3.7 Housing Supply

In accordance with the requirements of the SLUP the IDP identifies a minimum five-year land supply for housing. At the time the IDP came into force in 2016 the annual Strategic Housing Indicator was 300 additional new dwellings per year giving a five-year land supply requirement for 1,500 dwellings. In July 2018, the States resolved to agree the States' Strategic Housing Indicator be set at completing 635 new units of accommodation between 2017 and 2021, with a plus or minus variance of 149 new units. The Indicator is currently under review.

It should be noted that the indicator relates to the completion of new dwellings not the supply of land through the planning system. The supply of land must be sufficient to allow for the development of at least the number of units expressed as the States' Strategic Housing Indicator. The States has no control over implementation of planning permissions and this is why the Indicator is not expressed as a target.

The methodology used to identify the supply of land for housing to meet the housing indicator (the Strategic Housing Land Availability Assessment, 2014 (SHLAA)) identifies a 5-year supply of housing based on:

Figure 10: SHLAA Housing Supply (2014)

Source of housing supply	2014 SHLAA
A. Dwellings with permission / under construction	713
B. Allocated sites (estimated lower yield)	718
C. Windfall allowance	150-300
Total (with full windfall allowance)	1731

A summary explanation of the methodology used to identify the supply of land for housing is available here ('Approach to the Housing Sites Allocations in the Draft Island Development Plan, December 2014').

A. Dwellings with permission / under construction

The current pipeline supply (dwellings with permission or under construction) is 540 dwellings. See **Figure 1** above.

B. Allocated sites

There are 15 housing allocations in the IDP in the Main Centres and Main Centre Outer Areas which are identified to be used for housing development including ancillary complementary development. The progress in the delivery of housing on these sites as at the end of 2020 is set out in **Figure 11** below.

Figure 11: Progress of the housing site allocations

Housing allocation sites	Progress	Net units approved	Estimated Yield (SHLAA[3] / DFs[4])
Belgrave Vinery	Draft Development Framework published	-	125-313
Bougourd Ford	Development Framework adopted	-	15-20
Braye Lodge	Development Framework adopted	-	10-20
Cleveleys Vinery	Development Framework adopted	-	19-29
Education offices	Development Framework adopted	-	17-24
Priaulx Garage	Development completed	19	-
Franc Fief	None	-	106-190
King's Club	Under construction	13	-
La Vrangue	Permissions 2019 (Vrangue Manor) and 2020 (Route De La Ramee) not part of the main site for future development	5	188-339
Les Bas Courtils	Development Framework adopted Permission (house / barn) 2017 - lapsed	-	11-17
Maurepas Road	Under construction	6	-
Petites Fontaines	Permission 2016 - lapsed	-	14-18
Pointues Rocques	Development Framework adopted	-	75-125
Saltpans	Development Framework adopted	-	84-154
Warry's Bakery	Development completed	20	-
	Total units (net) permitted on allocations	**63**	

3 Strategic Housing Land Availability Assessment (2020 update)
4 Development Frameworks

As at the end of 2020, 63 dwellings have been permitted on allocated sites. 24 of these dwellings form part of the pipeline supply. Taking account of updated yields from approved Development Frameworks, the remaining supply from allocated sites is therefore at least an estimated 664 dwellings.

C. Windfall allowance

The windfall allowance[5] (sites other than the allocated sites) in the 5-year supply is up to 20% i.e. up to 20% of 1,500 dwellings which is 300 dwellings over 5 years, which was the indicator at the time the IDP was drafted. This is based on historic trends of permissions for smaller sites and is an assumed allowance, not a target or limit, but is monitored here to inform future iterations of the SHLAA. Since the adoption of the IDP 584 dwellings have been permitted on windfall sites. Of these 584 dwellings, 293 dwellings were permitted on smaller sites (1-4 dwellings). The number of dwellings delivered through windfall to date has therefore exceeded expectations.

3 In the Strategic Housing Land Availability Assessment (SHLAA) only sites of 0.25 acres (0.1 Ha, 0.6 vergée) and over or that could provide 5 or more dwellings have been identified as contributing to the supply of land. It was envisaged that mainly sites below this threshold would contribute to windfall provision, although sites over this threshold may come forward as windfall. The Plan does not include housing site allocations in the Local Centres or Outside of the Centres and the SHLAA did not include those locations in the land supply. Any dwellings permitted in these locations would form part of the windfall provision.

Housing supply

In summary, the housing supply at the end of 2020 is shown in **Figure 12.**

Figure 12: Source of housing supply

Source of housing supply	End 2020
Dwellings with permission / under construction	540
Remaining capacity on allocated sites (lower estimated yield)	664
Windfall allowance	150-300
Total (with full windfall allowance)	1504

The supply of housing (in **Figure 12** above) is currently well in excess of the 5 years supply requirement (486-784 dwellings). **Figure 13** suggests that the supply of housing via planning permissions is broadly appropriate to meet housing need (in terms of the total number of dwellings required) at the current rate of delivery. The level of housing need as expressed in the Indicator is currently under review and there are market signals that the level of supply of housing and the type of housing available is not meeting demand. This is an issue for the Housing Action Group to consider and may have implications for any future review of the IDP policies.

INDICATOR

Minimum 5-year supply of housing land – the Strategic Housing Indicator is presently 635 new units of accommodation between 2017 and 2021 (+/- 149 units).

PROGRESS

Land supply of 1504 dwellings.

Figure 13: Dwellings completed in relation to the Strategic Housing Indicator (2017-2020)

	Strategic Housing Indicator (4 years)	Completed dwellings (2017 to 2020)
Private Market dwellings	272 - 459	291
Affordable Housing dwellings	117 - 168	149
Total	**389 - 627**	**440**

3.8 Strategic Housing Land Availability Assessment

The Strategic Housing Land Availability Assessment (SHLAA) was produced in June 2014 and is part of the evidence base that informed the preparation of the draft IDP. It is effectively a 'stock check' of the supply of potential development sites for housing in Guernsey. It provides information on the suitability and availability of each site; whether the development of a site is considered to be achievable; and if there are any significant constraints to development. It also demonstrates whether there is an adequate supply of land to meet the Island's Strategic Housing Indicator over the life of the IDP.

An update to the 2014 SHLAA has been undertaken. The SHLAA update assesses sites from a number of sources:

» Remaining 'deliverable' and 'developable' sites from the 2014 SHLAA (including housing allocations) – undeveloped sites without an extant planning consent;

» Remaining sites considered not deliverable/ developable in the 2014 SHLAA where the circumstances have since changed and the site is undeveloped and without an extant planning consent;

» Any other site in a Main Centre with an approved Development Framework in addition to the sites above, that is undeveloped and without an extant planning consent; and,

» Regeneration Areas as designated in the IDP.

A total of 39 sites have been assessed. Each site has been subject to a desktop assessment of its suitability for development for housing in relation to the physical attributes of the site and its location, including accessibility, provision of services, environmental constraints and risks to the development of a site. 10 sites were considered unsuitable and discounted. This includes a number of States owned sites that are not available in the next 5 years, but that may become available thereafter.

Each site was assessed for its development potential (i.e. the number of dwellings that could be achieved on the site, or 'yield'). The estimated development potential is presented as a lower and higher range for the number of dwellings that could be achieved. The total estimated yield from the 29 sites is 1,016 to 2,025 dwellings. These figures included the full yield of all the sites, but in reality typical build rates in Guernsey mean that the larger sites are unlikely to be able to be developed in full within the next 5 years. Therefore, the true 5-year supply of land is lower. This would need to be considered in detail in a new SHLAA to support a review of the IDP.

Figure 14: Number of potential dwellings from sites identified in the SHLAA update

Site Characteristics	Number of sites	Yield	
Location		Min	Min
St Peter Port Main Centre	6	152	196
St Peter Port Main Centre Outer Area	9	295	507
St Sampson / Vale Main Centre	2	63	366
St Sampson / Vale Main Centre Outer Area	12	506	956
	29	**1,016**	**2,025**
Site type			
Brownfield	13	276	658
Brownfield / Greenfield	7	438	770
Greenfield	9	302	597

The review of the SHLAA takes into account Development Frameworks approved by the Authority. The IDP says that Development Frameworks may be required for certain sites to guide development. In 2019 and 2020 12 Development Frameworks for residential development were approved by the Authority. 3 sites in the St Peter Port Main Centre, 7 in the St Sampson/Vale Main Centre and 3 in Local Centres. 22 Development Frameworks have been published to date. 1 site with an approved Development Framework has been constructed, a further 5 sites with a Development Framework have planning permission and there are live planning applications on a further 2 sites.

3.9 Affordable Housing[6]

IDP Policy GP11: Affordable Housing requires proposals for development resulting in a net increase of 20 or more dwellings to provide a proportion of the developable area of the site for Affordable Housing. In some cases the provision of units or, in exceptional cases, off-site land or unit provision is permitted. In addition, some permissions are given for Affordable Housing exclusively (such as developments by the Guernsey Housing Association).

As noted above, in July 2018, the States resolved to agree to separate the States' Strategic Housing Indicator into an Affordable Housing Indicator set at completing 178 units of Affordable Housing over the period 2017-2021 with a

6 Affordable housing means social housing provided for persons on low incomes, and intermediate housing. Social housing - dwellings owned or controlled by the Committee for Employment & Social Security, the GHA or any other person or legal arrangement which is offered to persons on low incomes or with other needs identified by the Committee a) Whose housing needs, as identified by the Committee, are not met by the private sale or rental market for dwellings, and b) Who meet the criteria set, from time to time, by the Committee, the GHA or other person or legal arrangement, as the case may be, for the occupation of such dwellings. Intermediate housing - dwellings owned or controlled by the Committee, the GHA or any other person or legal arrangement which are offered a) to persons whose housing needs, as identified by the Committee, are not met by the private sale or rental market for dwellings, b) on a basis which may include provision for part ownership, part share of equity or low cost ownership or similar scheme (however named), and c) to persons who meet the criteria set, from time to time, by the Committee, GHA or other person or legal arrangement, as the case may be, for the occupation of such dwellings.

plus or minus variance of 32 new units to give the flexibility to react to demand and market changes. This equates to 29-42 dwellings per year over the 5 year period.

No sites have had a Policy GP11 Affordable Housing requirement since the adoption of the IDP. Permission was granted for 1 additional unit of Affordable Housing in 2019 and 2020. The total Affordable Housing permitted to date under the IDP is 57 dwellings.

Policy GP11 was amended[7] by the States in approving the IDP. This increased the threshold at which the policy requirement for Affordable Housing applies from 5 or more dwellings to 20 or more dwellings. In 2019 there were 5 permissions for 5 or more dwellings and 10 permissions in 2020, none of which were for 20 or more. These sites would have had a requirement for 20-24% of the developable part of the site for Affordable Housing, or approximately 26 completed dwellings in total, under the policies of the draft IDP had the thresholds not been amended.

The Government Work Plan in 2021 includes recovery actions in relation to Affordable Housing. This includes a review of the existing stock to see if it is being used to its full potential and to establish the need for any new stock. The resulting Affordable Housing Development Plan and the review of the Indicator will need to be considered in any future review of the IDP policies and housing land allocations.

7 Billet D'Etat XXV & XXVII P.2016/25 Amdt 2 Proposed by Deputy P Roffey, Seconded by Deputy Laurie Queripel

3.10 Conclusions

At present the policies of the IDP referenced above support the States' priorities as set out in the Government Work Plan. The policies support housing development of all tenures in appropriate locations. There has been a consistent level of permissions, and completions of dwellings, to help meet housing need. There are also a number of housing allocation sites remaining without planning permission. The housing Indicator is under review however and this will need to be considered in future monitoring and any future review of the IDP policies. The level of permissions for Affordable Housing has been much lower in 2019 and 2020 than in previous years under the IDP and Policy GP11 has not delivered any Affordable Housing dwellings or land to date. This is an issue for the IDP to be considered alongside the proposed Affordable Housing Development Plan and any direction given from workstreams for elderly tenures and key worker housing. The level of housing development permitted Outside of the Centres is also an issue to be kept under review to ensure the IDP continues to deliver the SLUP spatial strategy.

Section 4
Offices

4.1 Introduction

The SLUP directs the IDP to focus office use within and around the Main Centres, where there are existing clusters of offices, while recognising the need for large floorplate office space with the allocation of an Office Expansion Area at Admiral Park (for floorplates over 1,000m^2). IDP policies allow smaller premises under 250m^2 within the Main Centres to change to an alternate suitable use, providing flexibility and to address an oversupply of, mainly tertiary, small office space. The change of use of larger substandard office premises to other uses, subject to demonstrating certain criteria are met, may also be considered.

Limited new office development within the Local Centres may be considered where it is shown they contribute to a Local Centre's range of services and facilities and reinforces them as sustainable centres.

Outside of the Centres, the SLUP directs the IDP to make provision for certain small-scale businesses, who have a justifiable need to be located Outside of the Centres based on the nature of operation and/or have difficulty in finding a suitable site within the Centres. New office development Outside of the Centres is supported through conversion of redundant buildings only.

Guernsey's finance sector is the central pillar of Guernsey's economy. This sector together with the supporting business services and legal sectors account for a quarter of all employment and contribute in the region of £1.3bn to the economy, equating to c.44% of the Island's economic output [source: Guernsey Facts & Figures, 2020]. These sectors are therefore the key driver for office accommodation on the Island.

The focus provided by the Government Work Plan 2021-2025 is critical in directing any ongoing and future monitoring and delivery of relevant policy. It is essential that present and future office stock allows for the sustainable prosperity of existing and emerging economic sectors, in particular the financial services industry, as well as providing opportunity for diversification and to prevent future untoward circumstances. Continuing engagement with stakeholders about the effectiveness of the IDP in delivering current and future office requirements is vital. The most relevant (but not the only) applicable actions in the Government Work Plan are:

- Scope actions necessary to support local entrepreneurship and diversification post COVID-19.
- Scope the options for Guernsey enterprise zones.
- Conduct a second red tape review.
- Support emerging economic opportunities.
- Complete Development Frameworks for all Regeneration Areas.

4.2 Profile of office accommodation

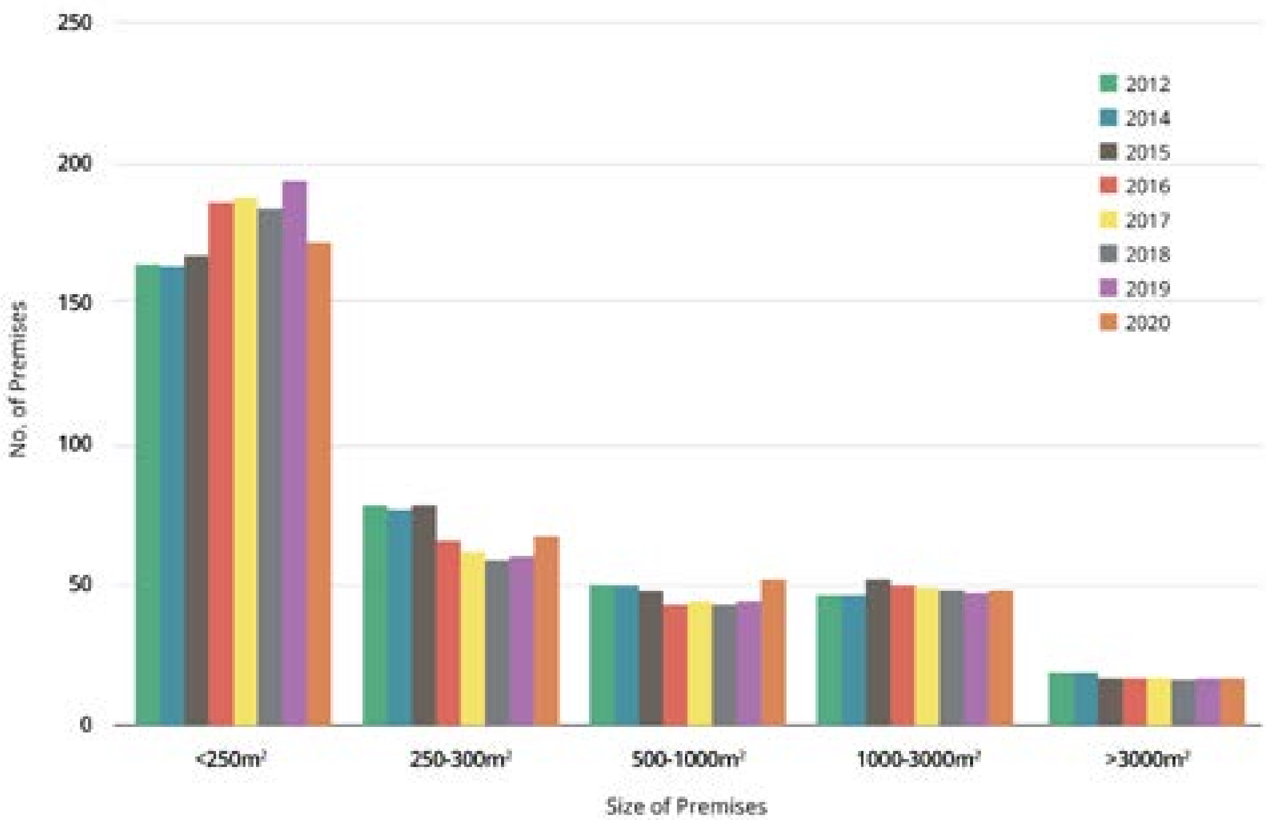
Over the last 8 years, there has been a slight (4.3%) decrease in the overall office stock in the Island with 356 premises providing 260,540m^2 of accommodation located on c17.2ha of land in December 2020 (see **Figure 1** below). Improvements to the data collection since 2018 indicates the decrease in accommodation stems largely from the loss of units of tertiary accommodation sized between 250-500m^2 from the sector together with the loss of a single large floor plate accommodation (4,355m^2) at the Royal Bank of Canada site at Upland Road during 2019.

Figure 1: Total number of office premises 2012 and 2020

2012 Count	2012 Area (m^2)	2020 Count	2020 Area (m^2)
358	272,248	356	260,540

Overall, the majority of the Island's office premises remain small scale (under 250m^2), with the number of this size of premises increasing compared to the baseline position in 2012. The number of premises over 3,000m^2 has decreased slightly but still accounts for the majority of the Island total office floorspace (38%) (see **Figures 2, 3 & 4** below).

Figure 2: Number of office premises in each size category (2012 to 2020)



Figures 3 & 4: Area of office premises in each size category (2012 & 2020)

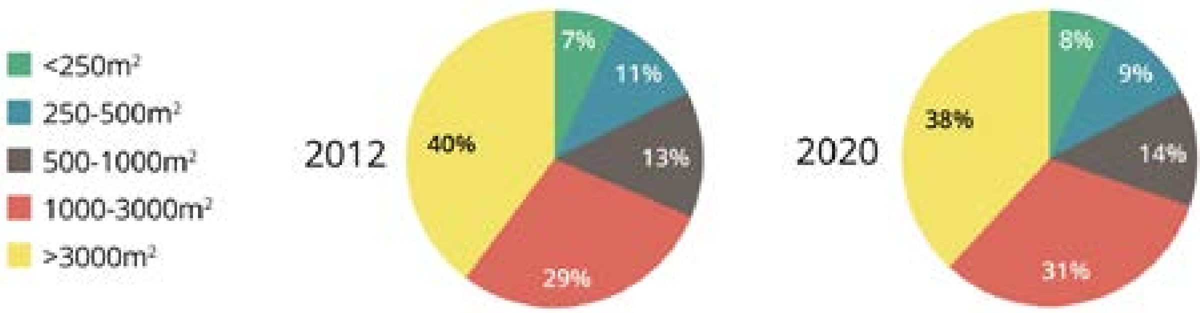
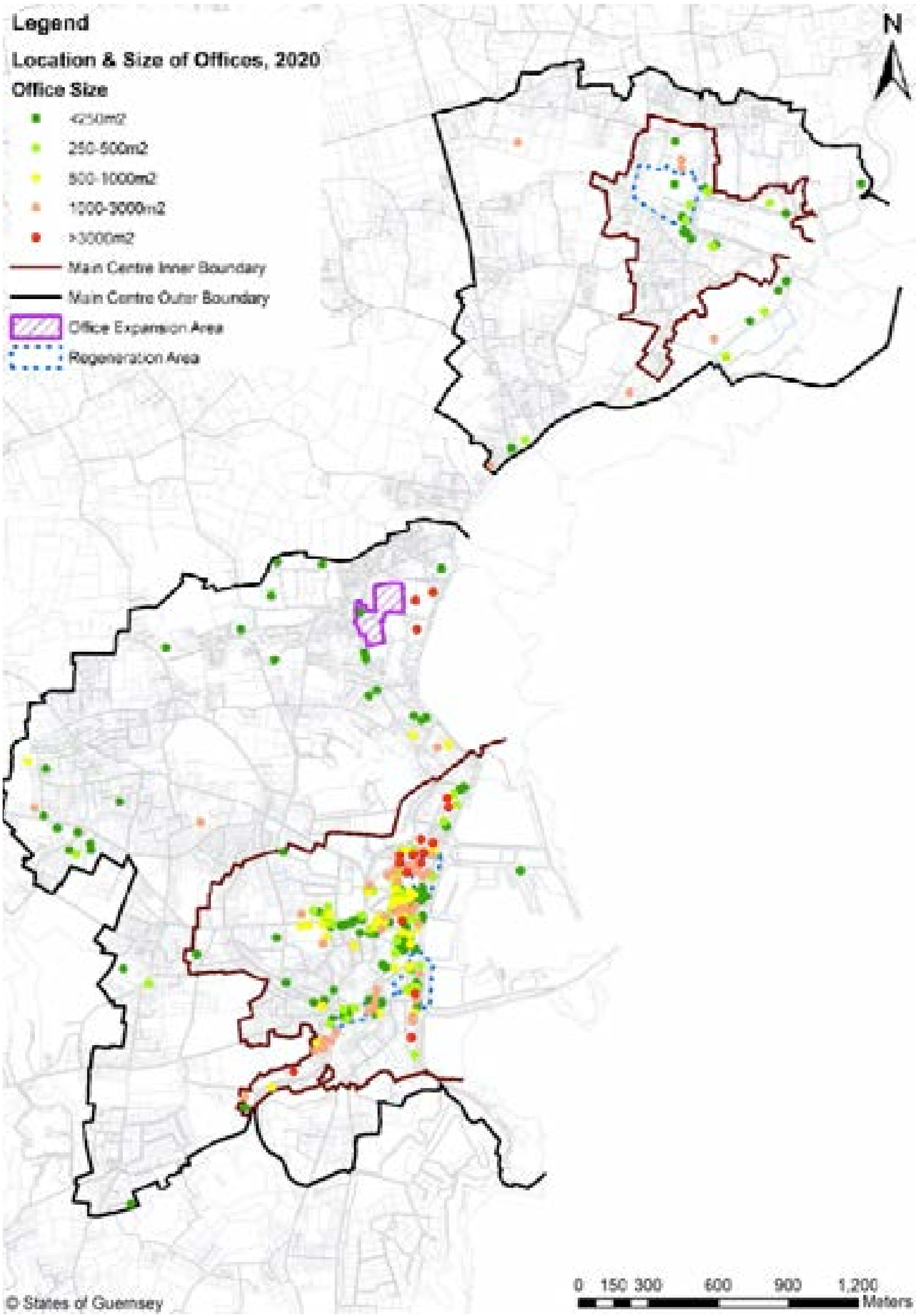


Figure 5 shows that the Main Centre of St Peter Port is the primary location for offices (88%), with the majority of this accommodation located within the inner area of this Main Centre. Similar to the 2012 baseline position, the St Sampson/Vale Main Centre provides a greatly reduced level of accommodation in comparison (5%) and continues to act as a minor office location.



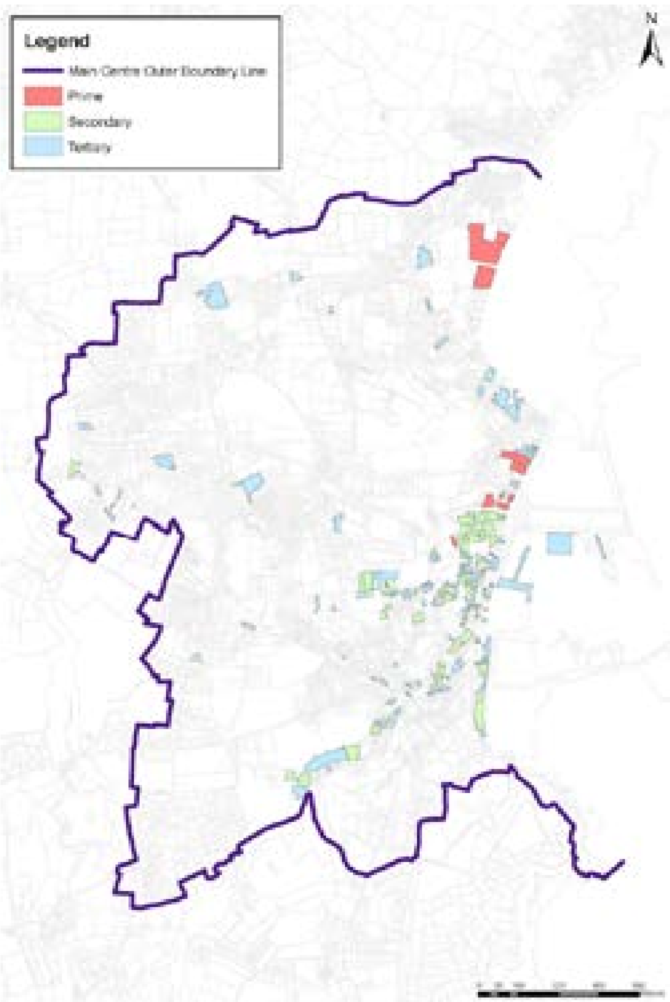
Figures 5: Map of Main Centre Offices by size classification

The 2018 AMR included an action for the Planning Service to liaise with industry representatives to determine appropriate classification for office quality. Further to this, in 2020 the Authority commissioned Watts Property Consultants Limited to undertake an audit of the existing office portfolio in St Peter Port Main Centre. As set out in further detail in the ELS update 2018 (gov.gg/CHttpHandler.ashx?id=121208&p=0), in consultation with relevant stakeholders, the criteria for Primary, Secondary or Tertiary office classifications were agreed. These classifications were then applied to the existing stock within St Peter Port Main Centre and the findings are shown in **Figures 6 and 7** below.

Figures 6: Summary of findings from the Office Quality Audit 2020 (gov.gg/CHttpHandler.ashx?id=138897&p=0)

Classification	No. of Buildings	Area (m^2)
Prime	11	48,571
Secondary	80	91,338
Tertiary	160	55,931

Figures 7: Map of Main Centre offices by qualitative classification



Feedback from industry clearly states a portfolio is required with a range of primary, secondary and tertiary office accommodation to meet the business needs of the Island. The Office Quality Audit 2020 enhances our understanding of the existing portfolio. According to feedback and research, given the level of uncertainty post Brexit and the Covid-19 pandemic, it is difficult to predict the future requirements for office space. The initial response to the ongoing or post pandemic situation is that occupiers are expecting to return to full or majority full capacity in the near immediate future. It is however acknowledged that employers will likely undertake occupational reviews to forecast future office requirements. Going forward, agile working and improvements in technology and establishment of digital strategies may reduce the overall demand for new space. The full impact of the pandemic has yet to play out and will need further investigation to understand our optimum office portfolio and therefore inform any changes that may be required to current planning policy. It is recommended that this is prepared in partnership with the industry and other key stakeholders and the results inform the full review of the IDP (2016). It is also recommended that an audit of existing stock should be undertaken every 3 years to inform monitoring and policy making.

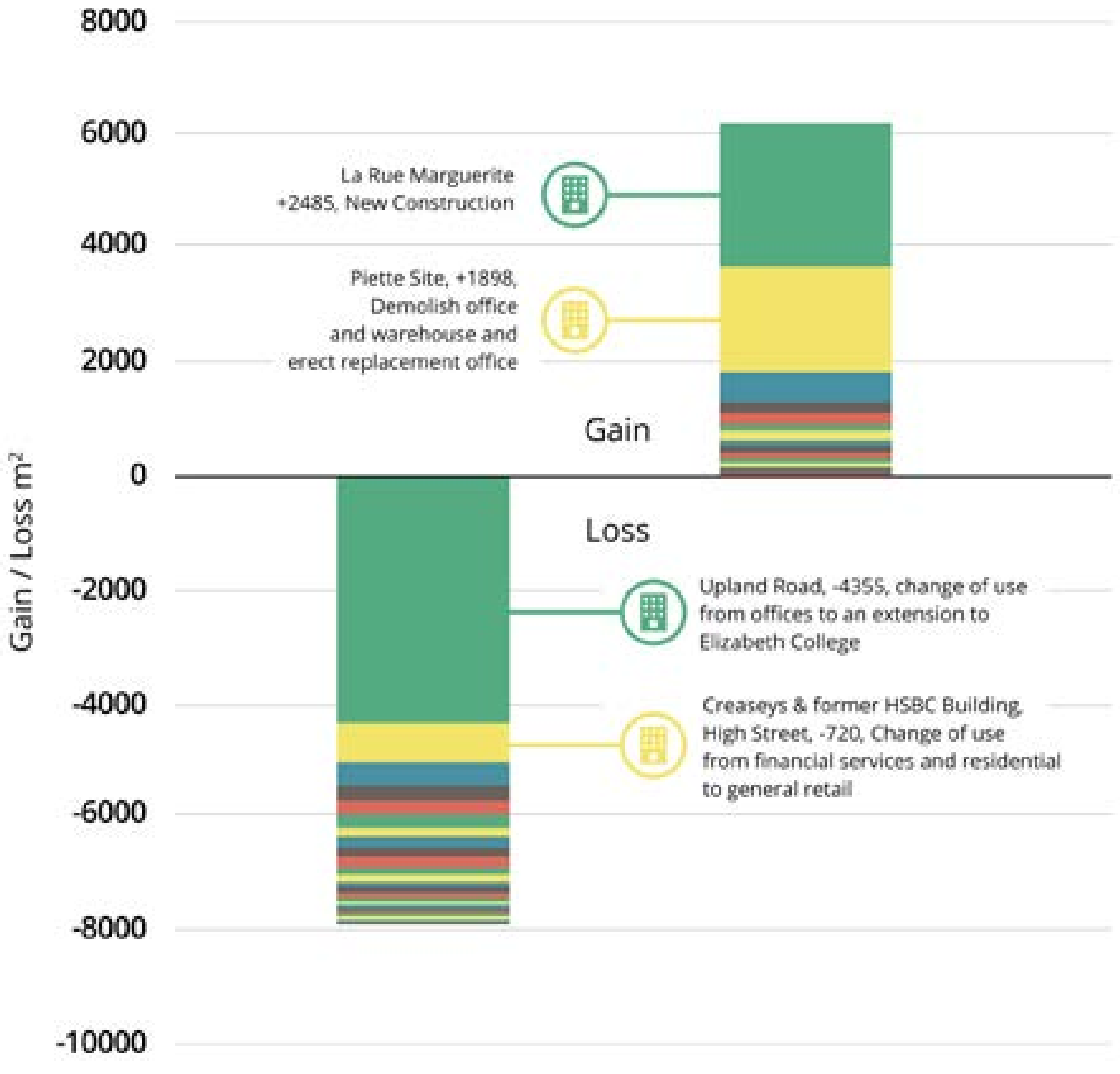
The Authority in 2021 considered the interpretation of Policy MC4(A) in relation to change of use of office premises over 250m^2. In relation to criteria (a) the standard of accommodation will now be assessed against the required modern standard applicable at the time of application. The Authority will use the Office Quality Audit and quality definitions to inform that assessment. In some cases industry advice may be sought to further inform the assessment. In circumstances where the accommodation is demonstrated to be of an unsatisfactory standard, criteria (b) of the policy requiring the marketing of the premises may be waived or altered as a minor departure of the IDP. This specifically addresses both low quality offices but also to allow residential use to come forward as appropriate in the Main Centres (in view of current critical recovery actions of the Government Work Plan). This policy interpretation has only come into effect in 2021 and any impact of this change will be monitored and reported in the next AMR. It is also noted there is a potential change to exemption ordinance at the beginning of next year that may also facilitate the change the use of upper floors away from office to residential.

4.3 Planning permissions in 2019 and 2020

During 2019 and 2020 a total of 38 planning permissions relating to office accommodation were decided. 23 permissions related to a loss in floorspace and were typically associated with a change of use from small scale office accommodation (under 250m^2) to residential dwellings, primarily in St Peter Port. 15 permissions were granted for a gain in floorspace and were typically associated with a change of use from small scale areas (under 250m^2) to office spaces, primarily in St Peter Port. Review of permissions demonstrates the flexibility intended by the planning policy for small scale units within the Main Centre to change use in response to market demands.

Permission was granted for the construction of new large scale (2,485m^2) purpose-built office accommodation at La Rue Marguerite, St Peter Port during 2019. However, a major loss in floorspace of 4,355m^2 was also recorded at the Royal Bank of Canada site on Upland Road, St Peter Port. This change of use from office accommodation to that of public amenity, specifically an extension of the Elizabeth College campus, was permitted under policy S5: Development of Strategic Importance in relation to educational purposes. Given the nature of the application, this is considered a one-off exceptional occurrence which is not likely to be repeated but does highlight the loss of any large floorplate accommodation can have a significant impact on the portfolio.

Figures 8: Chart displaying planning permissions relating to office floorspace gain/loss in 2019 & 2020



Although 2019 and 2020 saw an overall loss in office floorspace of 1,729m² this is not considered definitive of any ongoing trend of office floorspace loss. During this time, there were notable positive gains in floorspace which were counteracted by substantial losses related to an isolated occurrence and/or the ongoing loss of undesirable accommodation from the sector. Importantly, there was no loss of any primary grade accommodation.

INDICATOR

Provide 30,000m² additional office floorspace over 10 years (from 2016)

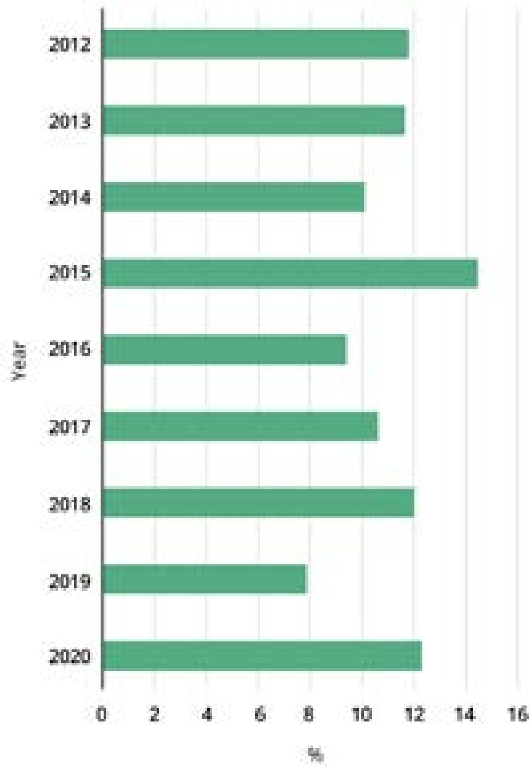
PROGRESS

2019+2020: Overall loss of 1729m² not considered indicative of trend

4.4 Office Expansion Area

Substantial work has commenced on an extant planning permission (pre-2019) for mixed-use development within the Office Expansion Area at Admiral Park. This development will include office facilities, cafe and a hotel with expected floorspaces of 3,343m^2, 252m^2 and 3,593m^2 respectively. In addition, a multi-storey car park is currently under construction. Within the confines of the same site a 2021 planning application has been made for a further office building with a gross internal area of 7,549m^2. The aforementioned is noted for reference purposes and shall be further detailed in future AMR's if applicable. The original spatial extent of the Office Expansion Area originally measured 3.06 ha as defined in the IDP. Taking into consideration the site extent detailed above it has been calculated that c1.56ha will remain for future development and associated infrastructure.

Figures 9: Chart showing office vacancy rates from 2012 to 2020



4.5 Availability of office accommodation

At the end of 2019 office vacancy rates were recorded at their lowest rates since 2012 which corresponds with feedback from the agents stating high levels of activity in the market during this time. By end 2020 vacancy rates have returned to a similar level to 2018 at 12.3%. Post Brexit effects and the effects of the Covid-19 pandemic on the desire for office space and increased agile working are still playing out and require further research to understand long term implications. It is encouraging that the ongoing construction of modern, purpose-built office accommodation at La Rue Marguerite and Admiral Park may satisfy any demand in the short to medium term for larger floorplate accommodation.

Greater detail on current determinations of the office sector can also be found in the forthcoming publication of Employment Land Study Update Report 2020.

INDICATOR

Maintain a minimum 10% vacancy rate to provide headroom in the market with appropriate mix of sizes available

PROGRESS

2019 – 7.85%, 2020 – 12.32%

4.6 Conclusion

Overall, it is noted that given the level of uncertainty post Brexit and the Covid-19 pandemic, it is difficult to predict the future requirements for office space. The initial response to any ongoing or post pandemic situation is that occupiers are expecting to return to full or majority full capacity. It is however acknowledged that with expected occupational strategic reviews being conducted any future forecast is difficult to ascertain. Going forward, agile working and improvements in technology and establishment of digital strategies may reduce the overall demand for new space.

Overall, there is a need to provide a range of different size and quality of accommodation within the portfolio to meet differing business needs. The Office Quality Audit Report 2020 provides a useful baseline of the existing portfolio. Further investigation into future requirements for this sector is recommended to be undertaken by the States of Guernsey to understand the optimum office portfolio and therefore inform any changes that may be required to current planning policy protection. It is recommended that this is prepared in partnership with the industry and other key stakeholders and the results inform the full review of the IDP (2016). It is also recommended the office quality audit is updated every 3 years to inform monitoring and policy making. This work will further a previous action of AMR to identify the appropriate recommended portfolio.

Section 5

Industry & Storage

5.1 Introduction

The IDP, in its provision of a comprehensive range of land opportunities for employment, directs industry, storage and distribution to be focused within and around the Main and Local Centres. Provision is also considered Outside of the Centres where a justifiable requirement is demonstrated. Specific land is also provided in the form of four Key Industrial Areas (KIA), each with an associated expansion area (KIEA) with a further detached KIEA north of the airport. In addition, certain criteria must be satisfied before any loss of industrial, storage and distribution land outside of the KIA's and along the Inter-harbour route is allowed.

The focus provided by the Government Work Plan 2021-2025 is critical in directing any ongoing and future monitoring and delivery of relevant policy. It is essential that present and future accommodation and land for Industry, Storage and Distribution allows for the sustainable prosperity of existing and emerging economic sectors as well as providing opportunity for diversification and to prevent future untoward circumstances. Continuing engagement with stakeholders about the effectiveness of the IDP in delivering current and future requirements is vital. The most relevant (but not the only) applicable actions in the Government Work Plan are:

» Scope actions necessary to support local entrepreneurship and diversification post COVID-19.

» Scope the options for Guernsey enterprise zones.

» Conduct a second red tape review.

» Support emerging economic opportunities.

» Promote and support innovation, transformation and entrepreneurial growth in the digital sector (scale-ups).

» Develop a blue economy supporting plan.

» Deliver a green economy supporting plan.

» Determine the future aggregate supply policy.

» Determine the future strategic use of Les Vardes.

» Conclude decision making on the future inert waste facility.

» Develop more detailed proposals for future harbour development and seek States' approval.

» Maintain Essential Infrastructure and Systems.

5.2 Profile of industry, storage and distribution sector

As at December 2020 there are 694 premises providing 418,620m^2 of accommodation located on 197.85ha of land, the majority of which is industrial in nature (56.7% of premises and 79% of land). Over the last 8 years, this indicates industrial floorspace is remaining relatively static (2.2% increase) with a decrease in storage and distribution floorspace (-1.44%). However, there is a notable gain of 21.7% of storage and distribution land in the Island since 2012. This in part stems from the conversion of redundant vinery sites to Industry and Storage open yards as observed through a review of planning applications.

As shown in **Figures 1 and 2**, similar to 2018, the St Sampson/Vale Main Centre contains the most industrial, storage and distribution floor space (c.39%), largely located on designated land. However significantly, provision Outside of the Centres (31.4%) now exceeds the provision within St Peter Port (c.26.5%). Premises for both industry and storage and distribution are typically under 250m^2, 59% and 48% respectively, with majority of floorspace provided through a few larger sites (>3,000m^2 sized accommodation).

Figure 1: Total number of Industry, Storage & Distribution premises 2018 to 2020

2018 Count	2018 Area (m^2)	2019 Count	2019 Area (m^2)	2020 Count	2020 Area (m^2)
707	419,164	708	409,698	694	418,620

Figure 2: Map of Main Centre Industry, Storage & Distribution premises by size classification

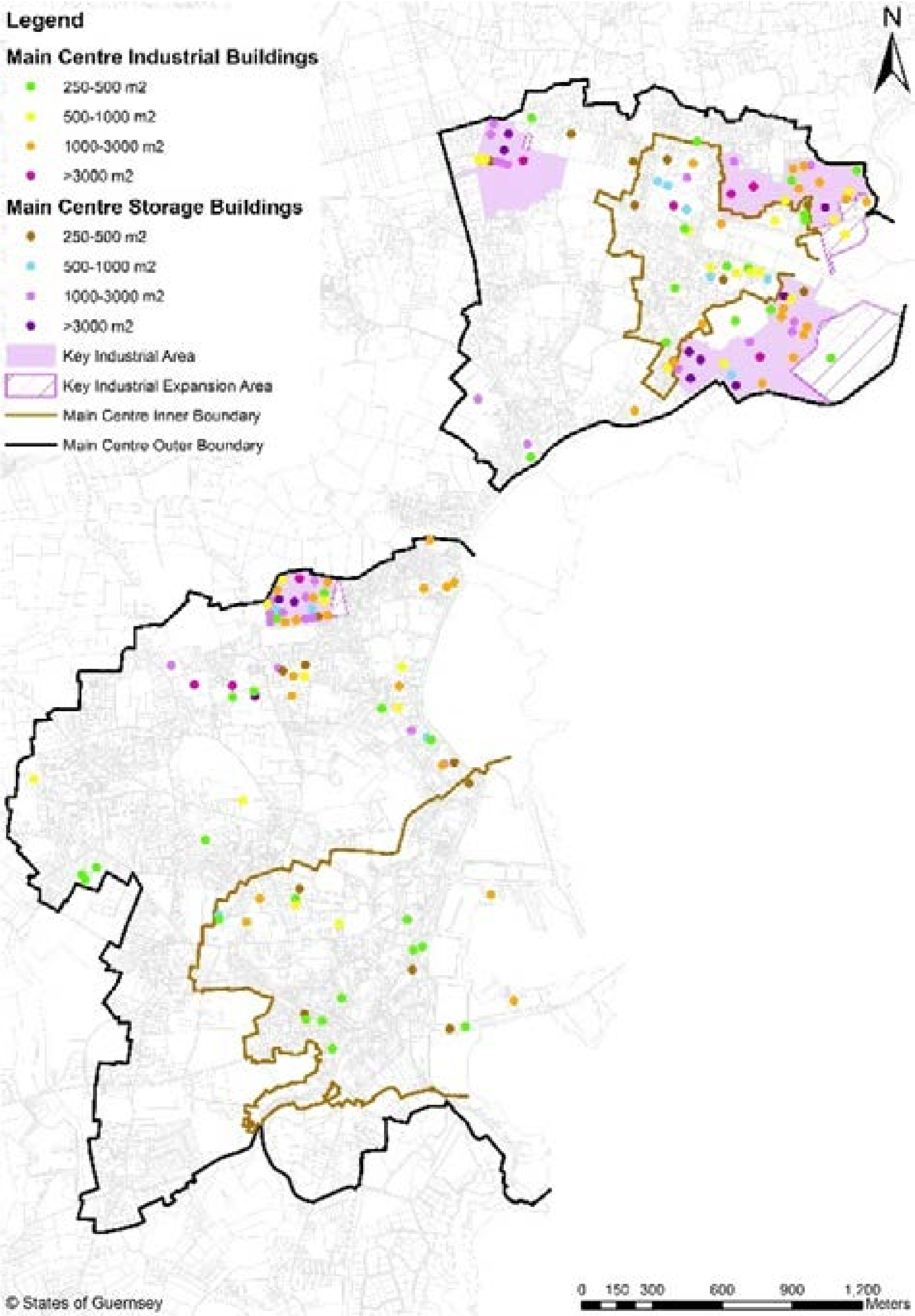
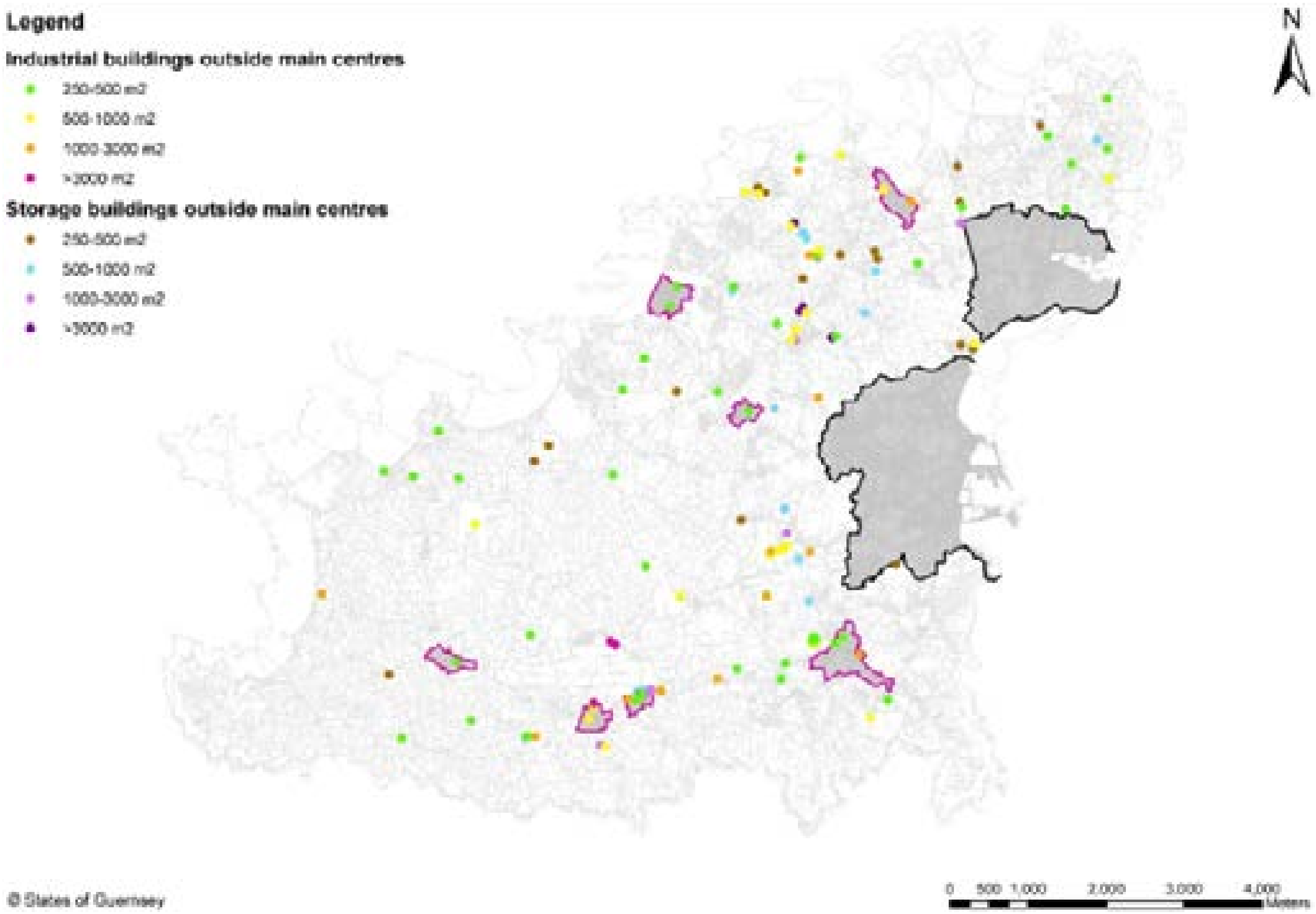


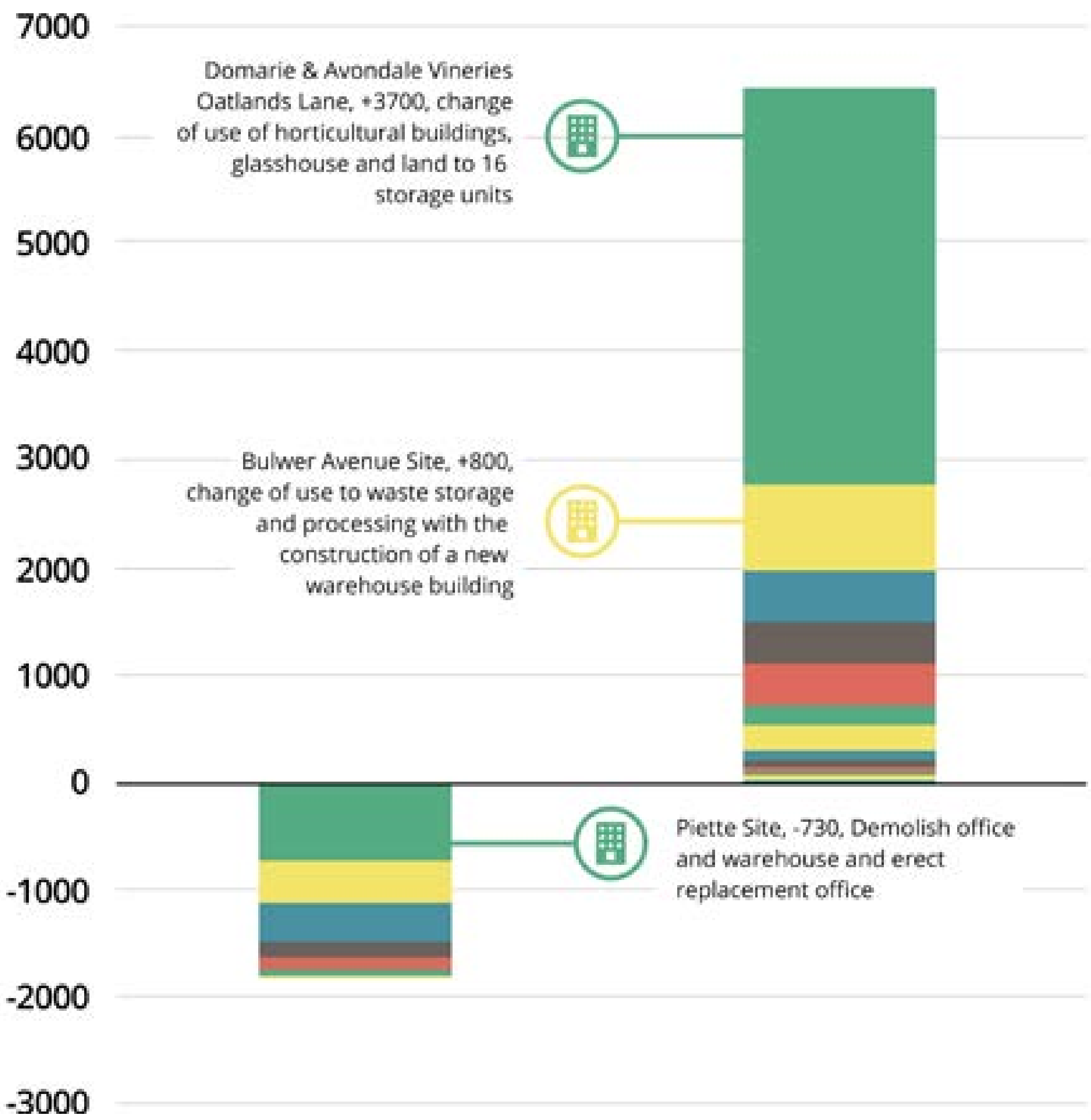
Figure 3: Map of Outside of the Main Centres for Industry, Storage & Distribution premises by size classification



5.3 Planning Permissions in 2019 and 2020

During 2019 and 2020 a total of 20 planning permissions relating to Industry, Storage & Distribution premises were decided. 7 permissions related to a loss in floorspace, covering a range of -39m² to -730m² which included demolition and replacement by residential dwellings and change of use to offices and public amenity. 13 permissions were granted relating to a gain in floorspace, typically below 1,000m². This included an 800m² addition at the site alongside Bulwer Avenue, within the Longue Hougue KIA, where there was a change of use to waste storage and processing with the proposed construction of a new warehouse building. In addition, planning permission for 3,700m² and c.1.9ha of land was granted on a redundant glasshouse site at Domarie & Avondale Vineries, Oatlands Lane, St Sampson where a change of use of redundant horticultural buildings and glasshouses to form 16 small scale storage units was approved.

Figure 4: Industry, Storage & Distribution Floorspace gain/loss



Overall Industry, Storage and Distribution saw an increase as recorded by planning permissions granted of 4,639m^2 and c.2.2ha of land over 2019 and 2020. A large proportion of this increase is due to the Domarie & Avondale Vineries, a redundant glasshouse site. However, the Employment Land Study (ELS) 2014 stated that the Island has an overprovision of industry, storage and distribution space and over the 10-year life of the IDP there will be a continuing decline in need for such space (loss of 22.6ha). The analysis of 2019 and 2020 values in regard to the overall gain of space are in marked contrast to this projected demand and need and are noted accordingly. Greater detail on current determinations of the Industry, Storage & Distribution sectors can be found in the forthcoming publication of the Employment Land Study Update Report 2020.

Any losses in floorspace were predominantly located in Main Centres on standalone sites with only limited occurrence Outside of the Centres and no loss within a KIA or KIEA. One proposal resulting in loss of floorspace related to a site off the inter-harbour route where it was demonstrated the site was no longer required in accordance with planning policy. Of the 13 proposals relating to gains in floorspace, 5 permissions were Outside of the Centres and were typically of limited extent and related to supporting existing sites, for example Beaucette Marina. The exception to this is the substantial gain at the aforementioned Domarie & Avondale Vineries on a redundant glasshouse site. Policies OC3 and OC7 allow for the redevelopment of redundant glasshouse sites, subject to the satisfaction of certain criteria, allowing flexibility for industries that need to be Outside of the Centres. This permission and a number of other permissions continue to deliver significant floorspace and Industry, Storage and Distribution land Outside of the Centres, as previously seen in 2017 and 2018. The impact of the scale of development should continue to be monitored to ensure the effect of the policies remains in accordance with the spatial strategy to concentrate development within the Main and Local Centres and there are no adverse impacts on directing investment towards the KIAs.

7 permissions were granted within Main Centres and of these, 4 were within a KIA. Combined with previous levels of activity in the KIAs the aforementioned continues to demonstrate the occurrence of positive investment to enhance the accommodation offering within KIAs (currently c.41% of all accommodation). Overall planning policies are working to support this sector.

INDICATOR

Forecast decline in the sector of 22.6ha of land and consolidation within the Key Industrial Areas and Key Expansion Areas of the Main Centres over 10 years (from 2016)

PROGRESS

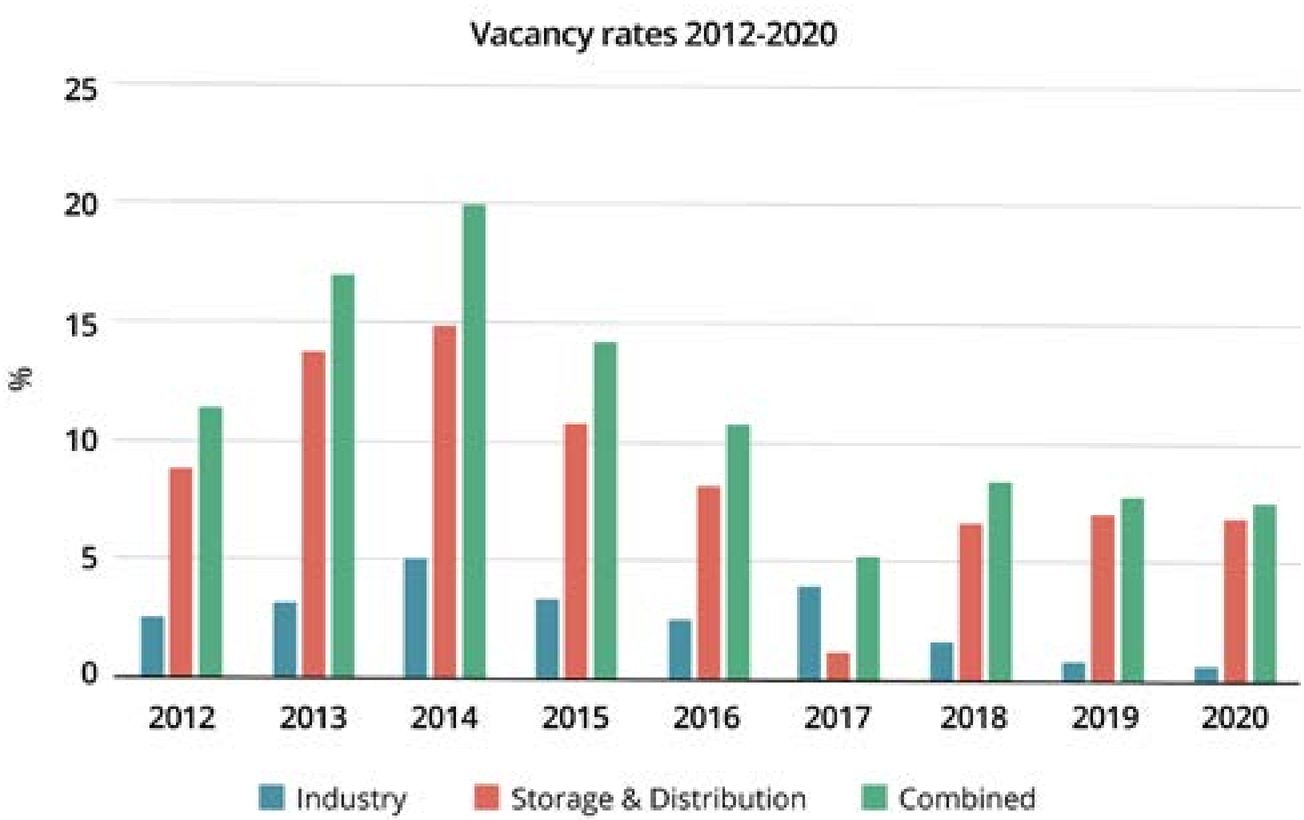
2019+2020: Overall gain of 4,639m^2 floorspace and 2.2ha in land is in contrast to forecast decline. While c.41% of accommodation for this sector is located within KIAs and KIEAs, growing provision Outside of the Centres (31.4%) needs to be monitored closely moving forward.

5.4 Availability of Industry, Storage & Distribution Accommodation

Current research indicates that Industry vacancy rates have fallen from a peak of 5.1% in 2014 to a low of 0.7 % in 2019 and 0.6% in 2020. Storage & Distribution vacancy rates had also been falling from a 2014 peak of 15% to a low of 1.2% in 2017. Since then, the values for 2018 to 2020 have risen and stabilised to a consistent range of 6.7 to 7%.

Overall, at the end of 2020, there was little on the market for industrial uses and moderate availability for storage and distribution uses. Whilst overall demand is low, those seeking industrial, storage and distribution premises may find there is limited choice of property within their price range or specification. However, the range of size of industrial, storage and distribution premises available to the market has become more balanced, with increased availability of larger scale premises. During 2020, it is notable that the majority of premises are on the market for less than a year (64.7%) unlike previous years.

Figure 5: Industry, Storage & Distribution Vacancy rates



5.5 Conclusions

An accurate summary of Industry, Storage & Distribution requires careful consideration as to any observation made in relation to the data presented and the nuances contained within. In general terms it can be seen from the TRP data extraction that Industry and Storage & Distribution floorspace is relatively static over the last 8 years.

Planning permissions granted for Industry, Storage & Distribution over 2019 and 2020 resulted in an increase in floorspace and land, although it is important to note that large floor space permissions seem related to Storage & Distribution rather than Industry. As seen in previous years, the majority of the gains can be attributed to a few large sites. The original Employment Land Study (ELS) 2014 stated that the Island has an overprovision of industry, storage and distribution space and over the 10-year life of the IDP there will be a continuing decline in need for such space. The analysis of 2019 and 2020 values in regard to the overall gain of space are in marked contrast to this and are noted accordingly.

Overall, at the end of 2020, there was little on the market for industrial uses and moderate availability for storage and distribution uses. Whilst overall demand is low, those seeking industrial, storage and distribution premises may find there is limited choice of property within their price range or specification. However, the range of size of industrial, storage and distribution premises available to the market has become more balanced, with increased availability of larger scale premises

It is evident that KIAs continue to form an important and attractive area of focus with KIEAs providing a necessary buffer of land that may be used for any future emerging industry. In addition, under policies OC3 and OC7 change of use from redundant glasshouse sites, subject to the satisfaction of certain criteria, allow flexibility and growth for industries that need to be located Outside of the Centres. However, while the intention of the spatial strategy to concentrate Industry, Storage & Distribution development in the Centres and KIAs continues to be met, it should however be noted that the distribution of accommodation Outside of the Centres now exceeds that in St Peter Port and should continue to be monitored.

Section 6

Visitor Accommodation

6.1 Introduction

The IDP policies for visitor accommodation (hotels, self-catering, guest houses etc) try and support existing businesses with flexibility for proposals to enhance the quality and marketability of accommodation and to change between the types of visitor accommodation.

The IDP policies for change of use away from visitor accommodation aim to retain the core stock of accommodation other than in exceptional circumstances and therefore apply criteria, including a requirement for two years marketing for lease or for sale, that must be met before a change of use away from visitor accommodation is considered. The SLUP requires policies to maintain an adequate stock of visitor accommodation to support the future viability and growth of the industry.

A Supplementary Planning Guidance document was produced alongside the IDP to help with interpretation of the IDP policy requirements for change of use of visitor accommodation to an alternative use.

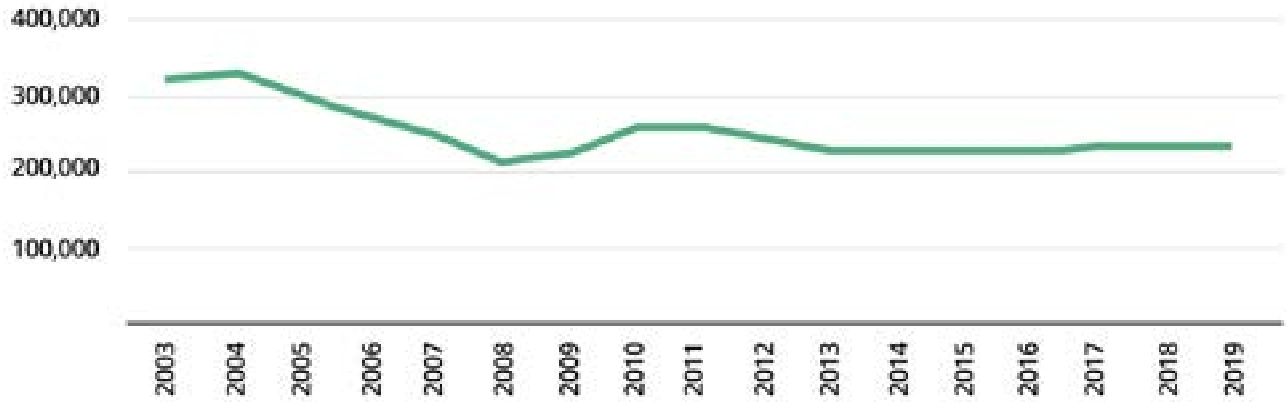
The Government Work Plan includes recovery actions to 'Establish a tourism plan and campaign' (which is a critical recovery action for the first 6 months) and to 'Prepare and invest in tourism product and accommodation'. These actions will give a potential new direction for tourism including a strategy for the potential use of heritage assets which will need to be taken into account in any future review of the IDP policies to ensure that they continue to deliver the States priorities.

In response to the impacts of Covid, the States resolved in February 2021 to implement a temporary exemption from the requirement for planning permission for certain changes of use of visitor accommodation. This is a change of use from visitor accommodation to residential use which took place or will take place between the 25/3/20 and 31/12/21. The change is specifically to address the pressures resulting from the pandemic and is subject to the use reverting back to its previous use prior to 31/1/22.

6.2 Staying Visitor Numbers

Trends in visitor numbers are kept under review. A significant decrease in staying visitor numbers could suggest that the IDP approach of restricting loss of accommodation may be too onerous. The overall trend in staying visitor numbers over the period 2003-2019 is a decrease then a levelling off - see **Figure 1** below. No data was collected in 2020 due to Covid restrictions on travel.

Figure 1: Staying Visitors 2003-2019



6.3 Stock of Visitor Accommodation

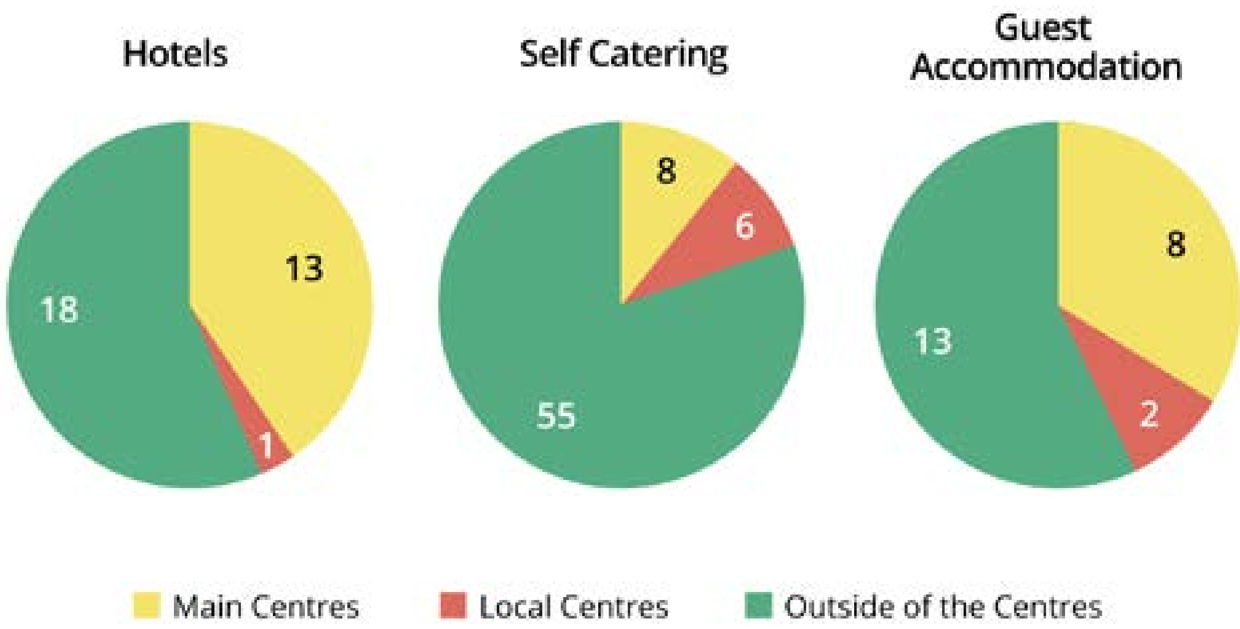
The stock of active visitor accommodation is shown in **Figure 2** below. The stock has decreased slightly since 2017, with the impact of Covid on visitor numbers the most likely cause of a number of establishments becoming inactive in 2020. There are currently 8 hotels that are inactive, up from 4 hotels in 2017 and 2018 and 6 in 2019. Overall, in addition to the impact of Covid, the change in the number of active establishments between 2017 and 2020 is as a result of a smaller number of new establishments opening than existing establishments becoming inactive. Of those that have become inactive, a large proportion are either private dwellings that are no longer available for visitors or are smaller establishments that have reverted to a residential use.

Figure 2: Stock of active visitor accommodation

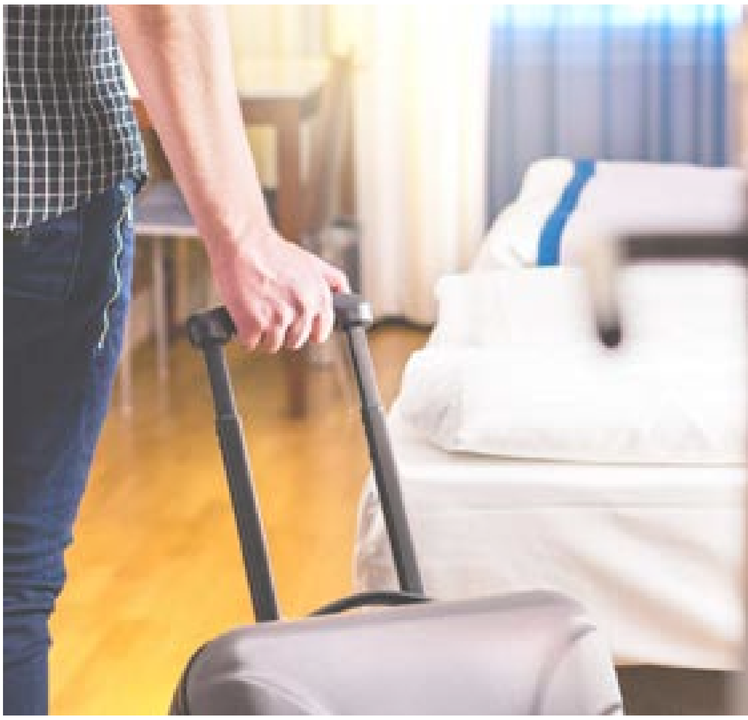
Type of accommodation	Number of Sites / Establishments			
	2017	2018	2019	2020
Guest Accommodation	28	29	28	23
Hotel	36	36	34	32
Self-Catering Accommodation	69	72	66	69
Private Dwelling	31	34	37	23
Group Accommodation	1	1	1	1
Total number of sites / establishments	**165**	**172**	**166**	**150**

The majority of accommodation of all types is located Outside of the Centres as shown in **Figure 3** below.

Figure 3: Location of the stock of active visitor accommodation (2020)



The IDP policies allow for smaller establishments to change use away from visitor accommodation. This is where the establishment comprises a single dwelling house with less than 3 self-catering units attached to it or located within its domestic curtilage or a guest accommodation establishment of less than 6 bedspaces that also comprises a single dwelling house where this will revert to a single dwelling house. Of the current stock of accommodation, 41 self-catering establishments have less than 3 units and 16 guest accommodation establishments are of less than 6 bedspaces and could potentially, if they are a single dwelling, change use away from visitor accommodation, under the terms of the IDP policies.



6.3 Planning Permissions

In 2019 there were 33 planning permissions relating to visitor accommodation establishments. In 2020 there were 27 planning permissions. The planning permissions in 2019 and 2020 combined were for:

Hotels: 35 permissions
There were no planning applications for new hotels in 2019 or 2020. Permission was granted to change the use of 1 hotel to residential use. 34 planning permissions were granted for works to existing hotels relating to 25 establishments.

Self-catering: 15 permissions
There were 7 planning permissions to create new self-catering accommodation, 2 permissions for additional units in existing establishments and 5 permissions to change use away from self-catering. There was 1 planning permission granted for works to support an existing self-catering establishment.

Guest accommodation: 2 permissions
There was 2 planning permission for new guest accommodation establishments.

Camping: 8 permissions
1 planning permission related to the times of use of an existing campsite. 7 permissions were for works to existing camping sites.

In relation to camping, there has been an emergence of a 'glamping' offer in Guernsey in recent years and a number of planning applications and pre-application enquiries for this use. A range of types of accommodation have been proposed and as such the DPA are working on an agreed definition for glamping with the Committee *for* Economic Development to inform future decisions and advice given on the application of the IDP policy for campsites.

INDICATOR

Change in the stock of visitor accommodation through planning permissions.

PROGRESS

Overall through planning permissions in 2019 and 2020 there was a potential increase in visitor accommodation should the projects be implemented (as was the case in both 2017 and 2018).

6.4 Conclusions

The policies of the IDP continue to support enhancement of existing establishments and new visitor accommodation, and there has been only a small increase in the number of inactive establishments. However, the Government Work Plan recognises that the COVID-19 pandemic has had a significant impact on tourism. A new tourism plan is proposed. This will need to be reviewed to consider whether the policies of the IDP for visitor accommodation, and any other policy relevant to the tourism offer, remain appropriate to support the Government priorities.

Section 7

Agriculture and Horticulture

7.1 Introduction

The policies in the SLUP relating to agriculture and horticulture focus on protecting large areas of contiguous agricultural and other land (including redundant glasshouse sites) where likely and able to contribute to the agricultural industry. Policies also support proposals that allow the extension of horticultural operations that are beneficial to the industry, recognising that horticultural operations have reduced in number and are consolidating on fewer, larger sites. Inevitably this has led to an increasing number of redundant glasshouse sites, and where those sites are not contiguous with other large areas of agricultural land, there is scope for them to be used for purposes other than for agriculture (Policies LP13: Redundant Glasshouse Sites, SLP8: Agriculture and SLP9: Horticulture).

The IDP supports and prioritises agricultural use within the Agriculture Priority Areas (APA). Land in agricultural use is expected to remain in (or in the case of glasshouse sites to revert to) agricultural use unless it can be demonstrated that the site cannot positively contribute to or is no longer required for commercial agricultural use or cannot practically be used for commercial agricultural use without adverse environmental impacts (Policy OC5(A): Agriculture Outside of the Centres – within the Agriculture Priority Areas).

The APAs are broadly drawn and include areas of land which are not currently used for agricultural purposes and could not be expected to contribute positively to commercial agriculture in the future for example dwellings and their curtilages – on the IDP Proposals Map the APA designation does not pick out individual fields but is drawn to cover large areas of the island that include agricultural land, so also include some non-agricultural uses. The APAs prioritise agricultural use to support the agricultural industry, but also allow for other forms of development within the APAs provided that they accord with all other relevant policies of the IDP. The APAs are not intended to safeguard the land for agricultural use if it is not appropriate or is not required for that use or where the inclusion of an area of land into a larger land parcel for agricultural purposes would have a negative environmental impact due, for example, to the loss of hedge banks or landscape features.

Outside the APAs, agricultural proposals relating to an existing farmstead or agricultural operation are supported, though the development of new farmsteads is not generally supported unless it is essential to the proper running of an agricultural holding. Development which would result in the loss of an existing farmstead or agricultural buildings or land will be supported where the new use accords with other relevant policies in the plan (Policy OC5(B): Agriculture Outside of the Centres – outside the Agriculture Priority Areas).

In relation to the horticultural industry, consistent with the SLUP, IDP policies generally support the principle of development which relates to the viability of an existing horticultural business. Whilst redundant glasshouse sites are expected to revert to agricultural use, there are provisions in policy to allow for other uses under certain circumstances (Policy OC6: Horticulture Outside of the Centres and Policy OC7: Redundant Glasshouse Sites Outside of the Centres). Redundant glasshouse sites are discussed in detail in the Redundant Glasshouse Sites monitoring.

Other policies in the IDP set out the criteria against which changes from agricultural land and buildings to other uses will be supported. These relate to, for example, the extension of curtilage (Policy GP15: Creation and Extension of Curtilage), the conversion of redundant agricultural and horticultural buildings (Policy GP16(A): Conversion of Redundant Buildings) and relevant appropriate uses as set out in the Outside of the Centres section of the IDP such as leisure and recreation (Policy OC9: Leisure and Recreation Outside of the Centres).

The overall emphasis of SLUP and IDP policy is to balance the protection of land for agriculture for the industry's current and future needs, also recognising the role it plays in countryside management, with ensuring land is available to meet other legitimate development requirements. In relation to horticulture, the emphasis of SLUP and IDP policy is to support existing horticultural businesses whilst managing the general decline of that industry and the resultant redundant glasshouse sites.

For the purposes of this monitoring, agricultural land is taken as the legal definition, where land, other than that used as a garden, is considered as agricultural where it is used, or is capable of being used (with the application of good husbandry), for dairy farming, livestock or market gardening, and includes land that is or was covered by a glasshouse. Accordingly, the planning applications analysed cover a range of land that technically falls under the agricultural definition and is assessed as such, but it is important to highlight that not all of the land falling under this classification is in, or is likely to be in, agricultural use or is actively farmed and it includes open land. All the applications in this section fall Outside of the Centres.

7.2 Planning determinations within the APAs

The APAs encompasses both agricultural and non-agricultural land and uses, however for the purposes of the AMR, applications in the APAs that relate to established non-agricultural uses (for example alterations to existing dwellings or replacement dwellings where there is no change to curtilage size) or do not impact on land area (for example new fencing or boundary treatments) are not included as they have no impact on the overall amount of agricultural land within the APAs. Horticultural proposals and applications which affect horticultural land and buildings are included because this land is considered agricultural for the purposes of Planning Law and is expected to revert to other types of agricultural use on cessation of horticultural use.

Although the legal definition of agricultural land is used, because this definition is wide the data presented does not necessarily give an accurate representation of the amount of land actively farmed, or land lost from active agricultural use. This is a limitation of the data available.

Therefore, the relevant planning approvals fall into the following categories:

» Agricultural proposals;

» Horticultural proposals;

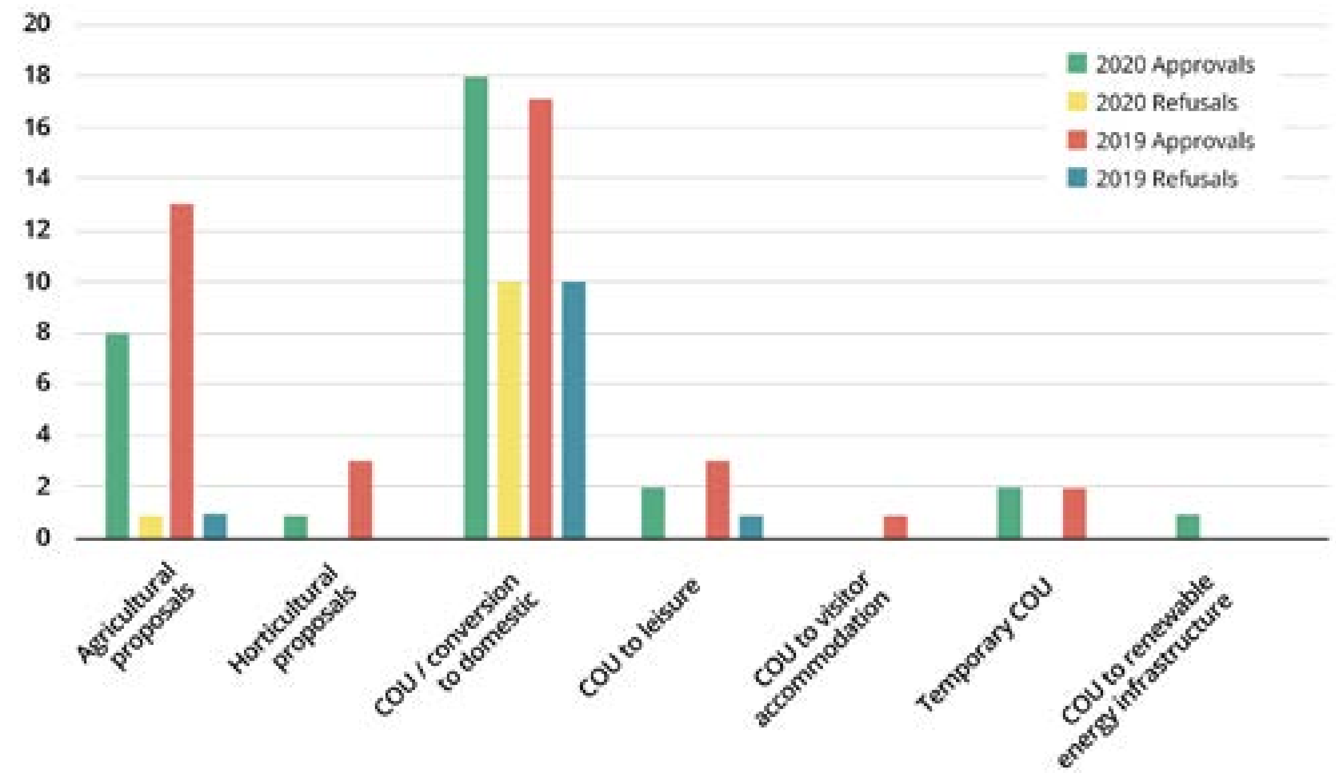
» Change of use of agricultural (but not necessarily actively farmed land) or horticultural land[8]; and

» Conversion of agricultural and horticultural buildings.

For the purposes of this report, change of use applications relate to a change of use of land, whereas conversions relate to the conversion of a redundant building. Applications for the conversion of redundant buildings often incorporate the change of use of an area of land around the building to form the curtilage (e.g. domestic garden in the case of a conversion to residential use), so to avoid double counting these are grouped together in the figures presented in **Figure 1**. **Figure 1** shows the breakdown, by application type, of applications determined within the APA during 2019 and 2020. The greatest number of applications in the APA have been for the change of use of agricultural land (but not necessarily land which is actively farmed) to domestic garden.

8 The legal definition of agricultural land is used where land, other than that used as a garden, is considered as agricultural where it is used, or is capable of being used (with the application of good husbandry), for dairy farming, livestock or market gardening, and includes land that is or was covered by a glasshouse. It does not mean that the land is actively farmed.

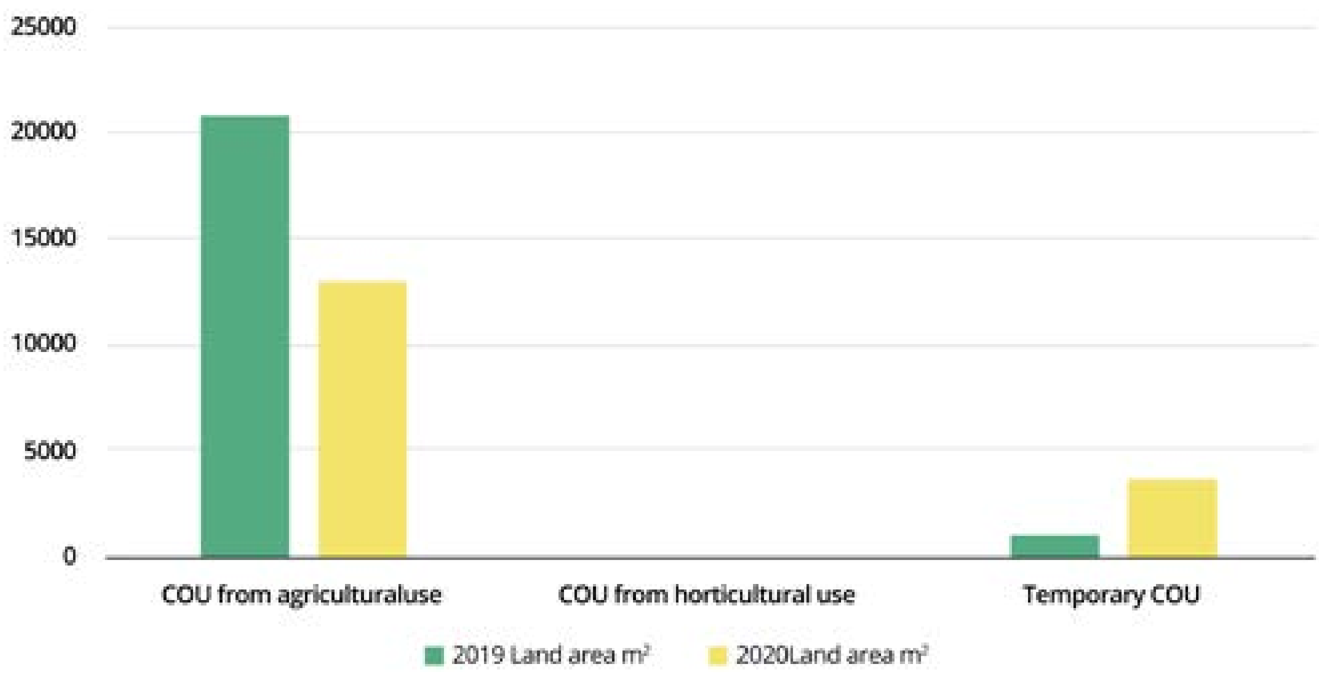
Figure 1: Relevant planning applications decided within the APAs during 2019 and 2020 by type (COU - Change of Use)



As part of the planning application process for development within the APA, applicants must demonstrate that the land in question meets certain criteria which ensures that only land that has been demonstrated to be no longer required for agricultural purposes or cannot make a positive contribution to an identified APA can change to other uses away from agriculture. Where the applicant has been unable to demonstrate that the site cannot positively contribute to the commercial agricultural use of an APA or cannot practically be used for commercial agriculture within an APA without unacceptable adverse environmental impacts, then the application has been refused.

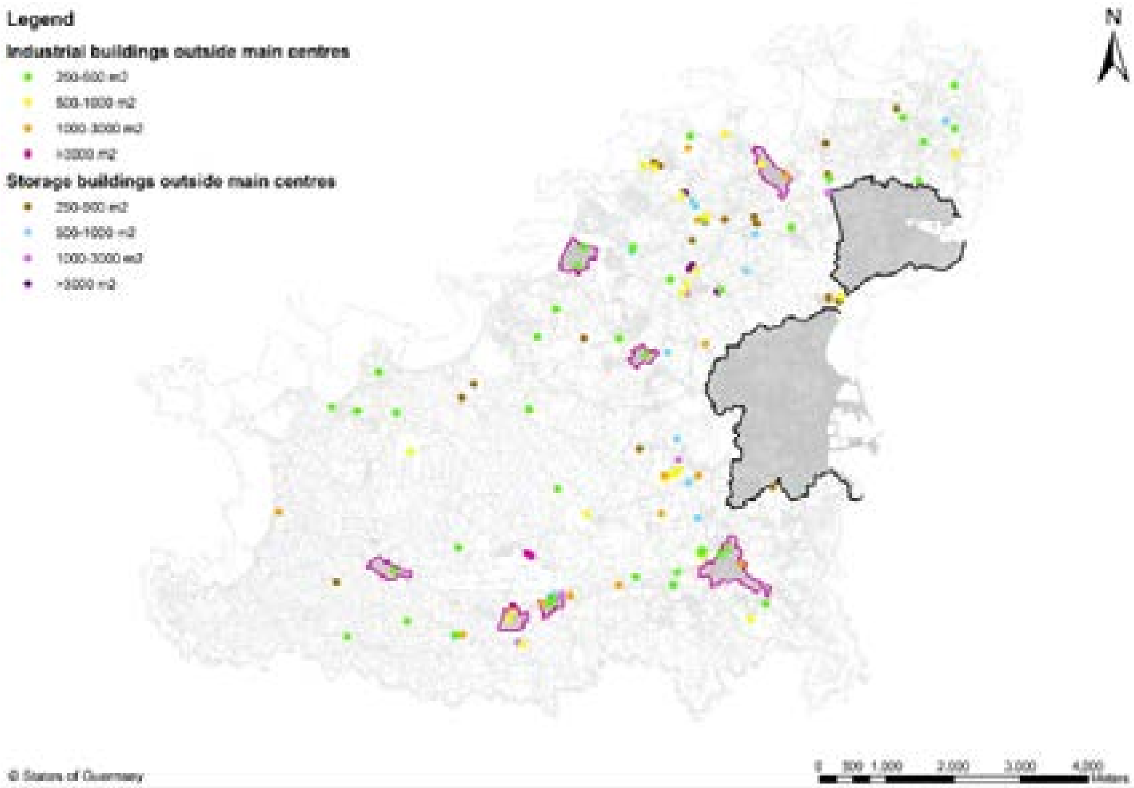
Figure 2 shows the approximate area of land granted approval to change from agricultural to other uses within the APAs (m^2) in 2019 and in 2020. As before, conversions are included in this figure as the proposals are often accompanied by an element of curtilage (for example the conversion of a redundant building to a dwelling with associated domestic garden).

Figure 2: Approximate area of land granted approval to change from agricultural / horticultural to other uses within the APAs (m^2) in 2019 and 2020



Where a change in the use of land was approved, this involved approximately 21,745m^2 of land, or 2.17 hectares (13 vergées) in 2019, and 16,530m^2 (1.6 ha or 10 vergées) in 2020. Of this, approximately 20,475m^2 of agricultural land gained approval to change use to domestic garden in 2019, and 12,800m^2 gained approval to change use to domestic garden in 2020.
The location of the planning approvals within the APAs are shown in **Figure 3**.

Figure 3: Location of planning approvals within the APAs



Analysis of the data from the Habitat Survey 2018 has been undertaken to gain a more precise understanding of the land currently available for agricultural use within the APAs.

The analysis found that within the APAs, there is approximately 1,373ha or 8,378v of agricultural land available (excluding that used for keeping horses or managed as curtilage). At the time of preparation and adoption of the IDP it was estimated that approximately 8,000 vergées of agricultural land was required for the dairy industry, plus 1,500 vergées for arable/other livestock. However, through the analysis of this data and officer level discussions with Agriculture, Countryside and Land Management Services (ACLMS) it has become clear that these estimates have a number of limitations. They do not, for example, take into account the additional amount of land required to enable rotation, and land required for other types of commercial farming such as other livestock farming (e.g. Guernsey goats, pigs, sheep etc.). There may also be a requirement in the future to grow more fodder crops to allow the industry to become more self-sufficient and sustainable, along with a possible increase in demand for smallholdings, and if so this will be reflected in agricultural land requirements. At the time of drafting, ACLMS are currently working to provide a new estimated agricultural land requirement which takes into account these aspects.

INDICATOR

Provision of sufficient agricultural land in the APAs to meet the present and future needs of the commercial agricultural industry.

PROGRESS

ACLMS gathering data to provide an estimated requirement that aligns with the IDP definition of commercial agriculture which can be used to inform a review of the IDP policies.

7.3 Planning determinations outside the APAs

As with applications within the APAs, only relevant planning applications have been assessed which are:

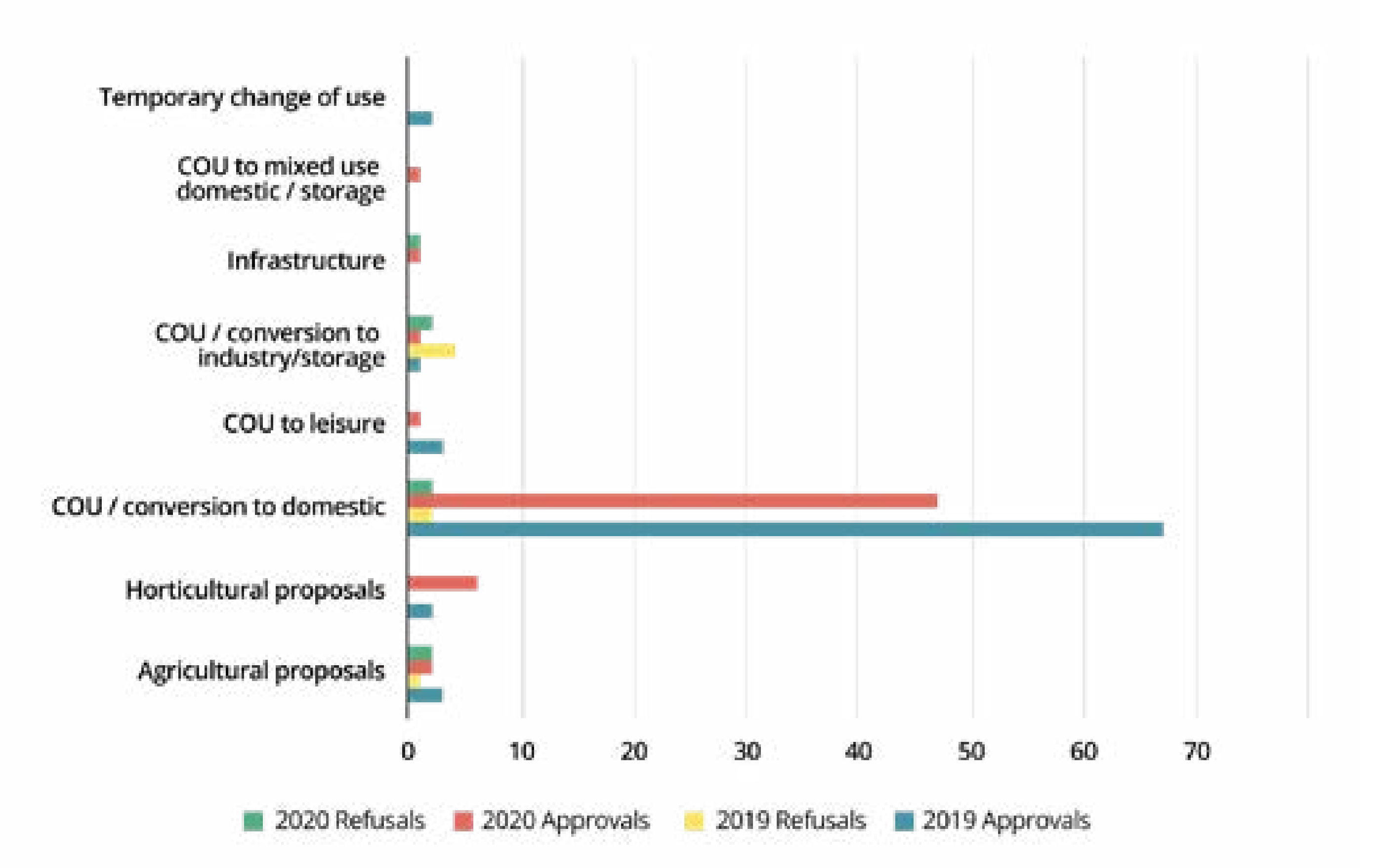
- Agricultural proposals;
- Horticultural proposals;
- Change of use of agricultural or horticultural land[9]; and,
- Conversion of agricultural or horticultural buildings.

9 The legal definition of agricultural land is used where land, other than that used as a garden, is considered as agricultural where it is used, or is capable of being used (with the application of good husbandry), for dairy farming, livestock or market gardening, and includes land that is or was covered by a glasshouse. It does not mean that the land is in active agricultural use.

As with the figures within the APAs, for the purposes of this report, change of use applications relate to a change of use of land, whereas conversions relate to the conversion of a redundant building. Applications for the conversion of redundant buildings often incorporate the change of use of an area of land around the building to form the curtilage (e.g. domestic garden in the case of a conversion to residential use), so to avoid double counting these are grouped together in the figures.

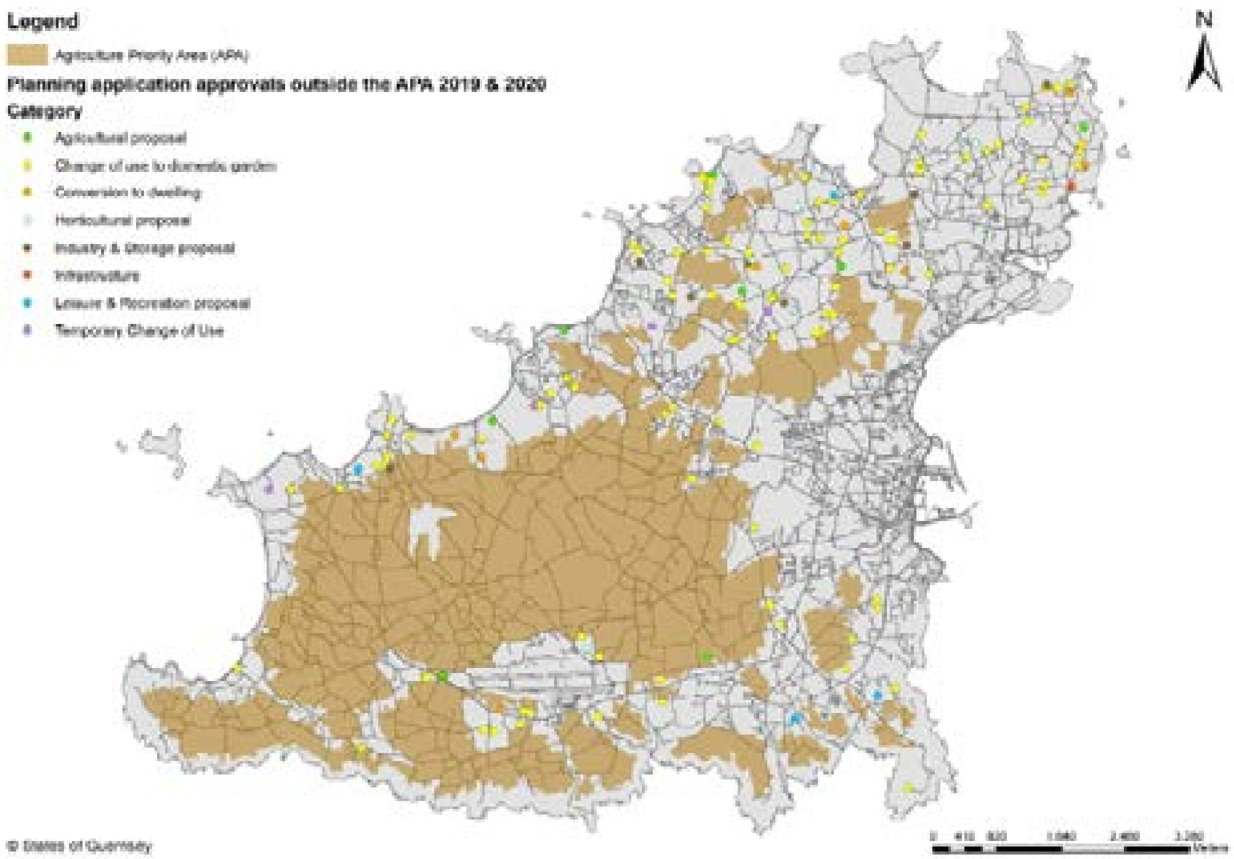
Figure 4 shows the number of applications decided by type outside the APAs in 2019 and 2020.

Figure 4: Number of planning applications determined on agricultural land outside the APAs by type (2019 and 2020)



Whilst the APA policy designation prioritises agricultural use, outside the APAs there is no such policy protection, the intention being to allow other legitimate land uses. As such, the applicant is not required to demonstrate that the land is unsuitable for commercial agricultural use and land that is actively farmed can gain permission for other uses where the criteria set out in IDP policy are met (such as landscape impacts).

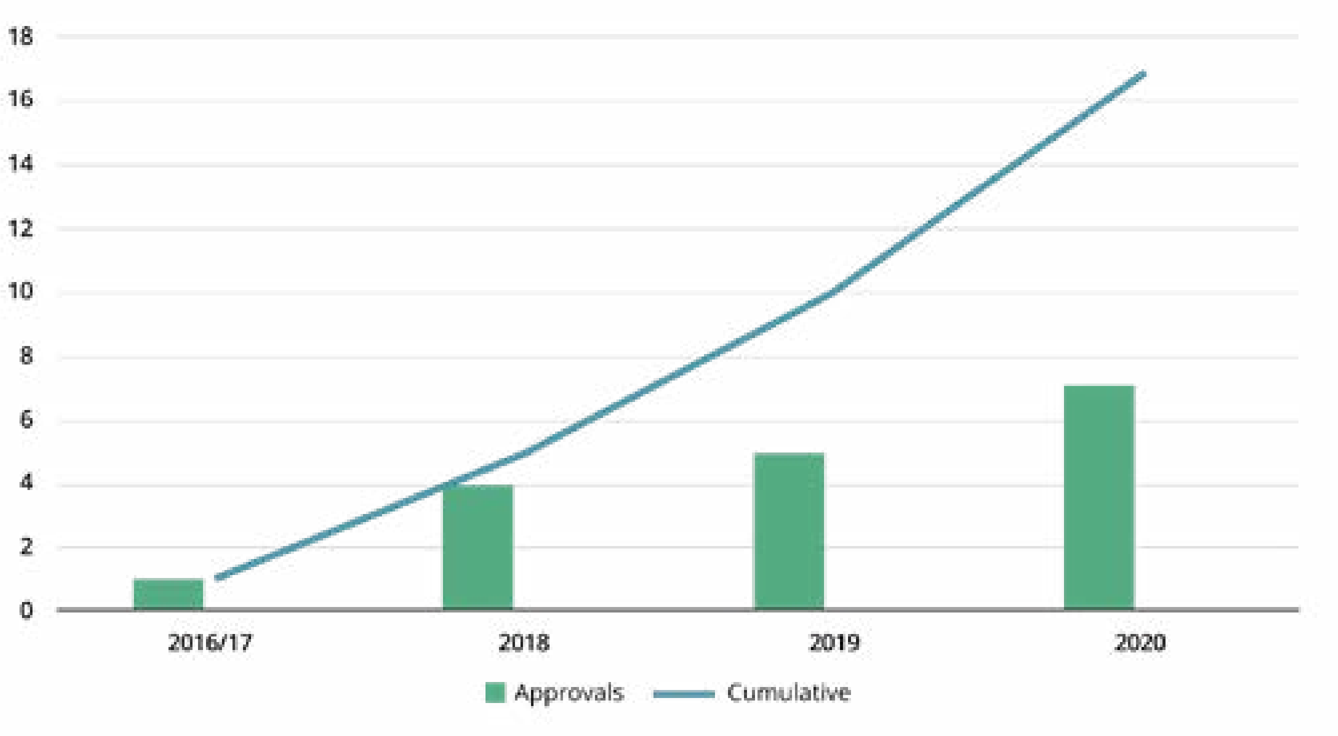
Figure 5: Location of relevant planning approvals Outside of the Centres, outside the APAs



7.4 Horticultural Proposals

There has been an increase in the number of planning applications relating to commercial horticultural operations since 2016. Four planning approvals in 2019 related to security measures and ancillary infrastructure at three separate commercial horticultural sites, and in 2020 there were five planning approvals relating to security infrastructure at a further five separate commercial horticultural sites. This appears to indicate growth in the commercial horticultural sector, potentially in relation to the growing of medicinal cannabis, representing diversification of the industry. **Figure 6** shows the number of planning determinations relating to commercial horticultural operations by year since the adoption of the IDP in November 2016.

Figure 6: Number of planning decisions relating to commercial horticultural operations from the adoption of the IDP (2nd November 2016) to 31st December 2020 (no applications have been refused)



7.5 Small-scale farming initiatives

The DPA previously committed to incorporating a review of IDP policies relating to small-scale farming initiatives in the 5 year review of the IDP. Small-scale farming has been interpreted to include initiatives from domestic level gardening to group initiatives like allotments which are essentially 'grow your own' initiatives and where there may be some ancillary sales of surplus produce. It could also include small holders working on part time or full-time basis who sell their produce. This latter group are considered to be part of the commercial horticultural and agricultural sector of the Island.

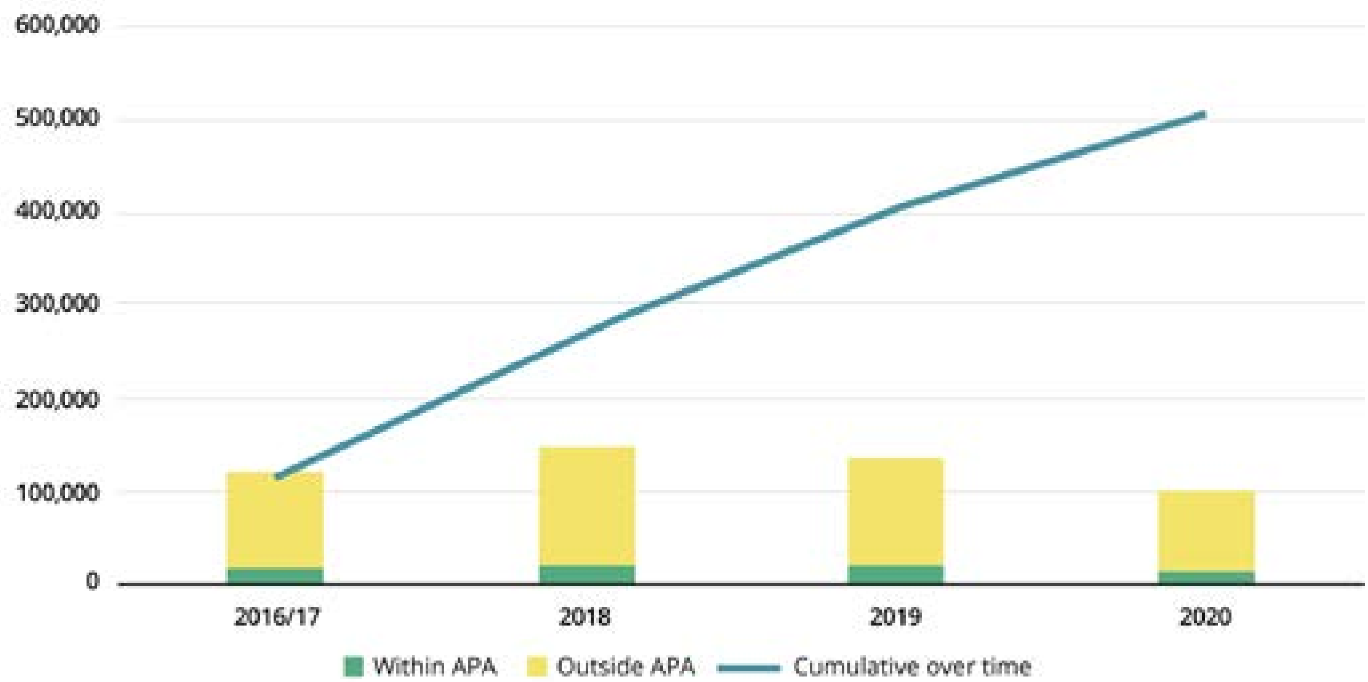
Initial assessment of the evidence found that the planning framework (including planning exemptions as well as IDP policies) is generally supportive of small-scale farming and local growing initiatives (including non-commercial initiatives) but found that there are complexities in some areas and opportunities to improve clarity. For example, clarification of terminology in the IDP may be required (including but not necessarily limited to hobby farming, small-holding, agricultural holding), as well as ensuring consistency of approach when determining whether a proposal is commercial or a leisure use.

The emphasis of policies in the IDP on consolidation of commercial horticulture and clearance of redundant glasshouse sites potentially limits the scope for supporting small-scale commercial horticultural businesses, particularly within the APA, as proposals will only be supported where they are in connection with existing commercial horticultural holdings and only where they are capable of making a material contribution to the horticultural industry. There is therefore no horticultural equivalent to 'commercial hobby farming'. Notwithstanding, there is a policy route via the leisure and recreation policies and via householder policies which enable ancillary development which could include small glasshouses. Where appropriate, OC9: Leisure and Recreation should be used as a policy route to supporting small-scale growing Outside of the Centres.

7.6 Change of Use of Agricultural Land (land actively farmed and land which could potentially be used for agriculture) to Domestic Gardens

Since the adoption of the IDP, Outside of the Centres a total of approximately 72,764m^2 (7.28 hectares or 44.4 vergées) of land within the APA gained approval to change to domestic garden, and 431,759m^2 (43.2 hectares or 263.4 vergées) of land outside the APA has been granted approval to change to domestic garden. This equates to a total of approximately 504,523m^2 (50.5 hectares or 307.8 vergées) of land that has been granted permission to change use from agricultural to domestic, although this does not suggest that all, or any, of the land involved was in active agricultural use, only that it falls within the legal definition of agricultural land notwithstanding that some has never and may never be used for agriculture.

Figure 7: Approximate area of land (m^2) which has changed use from agricultural land to domestic garden since the adoption of the IDP (2016) to the end of 2020



Planning permission is not always required for alternative land management techniques, for example the planting of hedges, trees and flowers or the mowing of grass or the use of land for keeping and grazing of horses does not generally involve works constituting development under the Planning Law and is therefore outside of the remit of the Authority.

In cases where proposals do require planning consent, paragraph 19.16.9 of the IDP states "Proposals for extending or creating curtilage should not result in an unacceptably negative impact on natural habitats. Where necessary, proposals will be required to demonstrate that there would be no significant detrimental impact in this regard and that, where necessary, such impacts can be mitigated". As such there may be cases where the applicant is required to undertake an assessment of the biodiversity of a site prior to the determination of an application for change of use to curtilage although to date this has only occurred on sites falling within Areas of Biodiversity Importance. This is currently being explored further by the Authority.

The emphasis on biodiversity has been highlighted through the States' adoption of the Climate Change Policy and Action Plan, and this has been supported by the adoption of the Strategy for Nature as an SPG by the Authority. The Government Work Plan includes a recovery action to deliver a green economy supporting plan that would in part be implemented using a biodiversity net gain planning tool. The States resolutions and recovery actions in relation to this will need to be taken into account in future reviews of the IDP policies and will also enable more weight to be given to biodiversity in decision making, including in non-designated areas.

A separate issue is that the rural landscape character of the Island could potentially be undermined by the extent of change of use of agricultural or open land to domestic curtilage due to the differing land management regimes which might sometimes be adopted. Whilst this is not always the case and whilst the majority of applications for change of use of agricultural or open land to domestic curtilage relate to sites that are not easily visible from the public domain, there are some sites that are prominent and where it is not only the contribution of the site to the openness of the landscape that is important, but also the contribution to the rural character of the Island, sometimes providing a break in an otherwise continuous stretch of ribbon development. It is also important to acknowledge that different land management techniques that may affect the rural landscape character may not constitute development and as such would not require planning permission (for example the close mowing of grass or planting of ornamental shrubs).

7.7 Conclusions

There are clear links between the agricultural industry and a number of recovery actions arising in the Government Work Plan. Whilst the planning system has a clear role in managing land use, some of the issues being raised may need to be resolved outside of the planning system. For example, planning approval is not needed for a change of use to graze horses on agricultural land and this would need to be managed through other mechanisms if necessary. Fundamentally, there is no legal requirement for landlords to make agricultural land available for agricultural use.

A limitation of the monitoring of the IDP policies is that the legal definition of agricultural land is used, but it does not mean that the land has been actively farmed. Within the APAs, if the land is required for agricultural purposes then a change of use away from agricultural use would be refused and as such an assessment of the contribution (or potential contribution) of that land to the commercial agricultural industry is undertaken as part of the determination of a planning application. However, outside the APAs, agricultural use is not prioritised and other legitimate uses are supported, and as such an analysis of the contribution of the land to the agricultural industry is not necessarily undertaken as part of decision-making. Applications for the change of use from agricultural land (but not necessarily actively farmed land) to domestic garden still account for the majority of relevant applications within this topic area.

The Habitat Survey 2018 contains much relevant data to monitoring and is the most comprehensive data available at the current time. However, a revised figure of land required by the commercial agricultural industry to support the industry long-term is still needed, taking into account the limitations of the previous estimates as outlined in this report. Capturing a 5-year rolling data set showing agricultural land use will also be of use in identifying which land is of importance to the agricultural industry and ensuring that the right land in the right place is prioritised for agriculture.

Overall, the IDP policies are supporting change in the horticultural industry, for example supporting the growth of the medicinal cannabis sector, as well as supporting diversification on farms, however there is no horticultural equivalent to small-scale hobby farming as the emphasis of policy is to consolidate the industry on fewer larger sites to promote the removal of redundant glass.

The planning policy framework continues to prioritise agricultural use within the APAs where that falls within the remit of the planning system, however as evidence emerges relating to the use of land for activities that do not require planning permission, such as the grazing of horses, there could be a need to investigate options and mechanisms, including outside of the land planning system, to ensure that sufficient land is available for the agricultural industry in the future.

Section 8

Redundant Glasshouse Sites

8.1 Introduction

Commercial horticultural operations have greatly reduced in number which has had the inevitable consequence of an increasing number of sites across the island where the glasshouses and ancillary structures are no longer required or capable of being used.

The SLUP, Policy LP13, requires the IDP to introduce policies to facilitate the clearance of redundant glasshouse sites. The States has recognised, through adoption of the IDP, that land planning alone cannot provide a comprehensive solution to the clearance of such sites. Policy OC7 provides some opportunity to incentivise the removal of redundant glasshouses by allowing a change of use. However, it is recognised that this is limited and that a comprehensive solution across the States and with landowners is required.

Under the terms of the Planning Law, redundant glasshouse sites and any ancillary structures are treated as agricultural land and so, on the clearance of the structures, the land is expected to revert to agricultural use. However, IDP Policy OC7: Redundant Glasshouse Sites gives flexibility for certain development proposals on some redundant glasshouse sites, in specific circumstances, where they are consistent with the policies of the IDP.

The Authority has produced Supplementary Planning Guidance which was adopted in December 2018 to clarify the definition of a redundant glasshouse site, a copy of this guidance can be found here.

8.2 Redundant glasshouse sites baseline

During 2020 the redundant glasshouse baseline was updated to coincide with the 2019 aerial photograph that was received by Digimap. This involved a systematic Island wide review of the 2016 redundant glasshouse baseline against the 2019 aerial photograph to see if any sites have been cleared of glass. At this stage, the condition and area of glass was also updated.

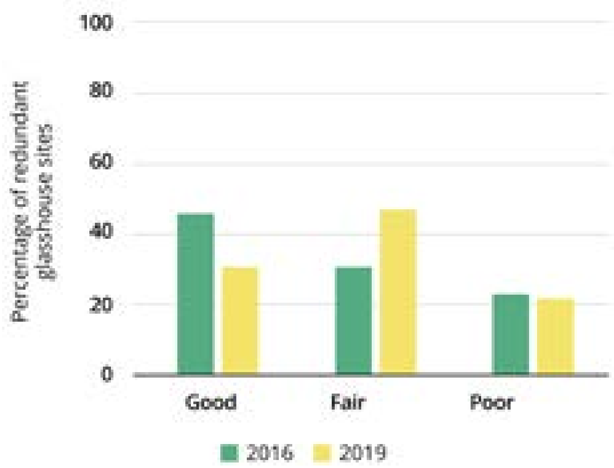
As part of the continued effort to refine and update the baseline, information provided by the Committee *for* Economic Development (C*f*ED) in relation to commercial horticultural sites was checked against the baseline. However, the C*f*ED has confirmed that it will no longer be in a position to carry out the horticultural census in the future.

A comprehensive overview of the methodology for the redundant glass baseline can be found in the 2017 AMR here.

8.3 Findings

The total area of redundant glasshouse sites for 2019 is approx. 75.5 hectares (460.7 vergées). Part of that figure may include remnants of former glasshouses, which may or may not at present have planning permission to be part of a domestic curtilage (approx. 6%).

Figure 1: Condition of redundant glasshouse sites identified through the base mapping exercise in 2016 and 2019



A total of 34 (approx. 3.9 hectares or 23.8 vergées) redundant glasshouse sites have been cleared since the previously identified redundant glasshouse mapping data (2016 until 2019). This has decreased since the 2017 baseline where 9 hectares (54.9 vergées) of glass had been cleared (from 2009 until 2016), albeit over a longer period of time. The majority of redundant glasshouse sites are being cleared as a result of action outside of the land planning system i.e. not as a result of a planning permission (removal of glasshouses in itself does not normally require a planning application), however there are still a proportion of sites that have been cleared as a result of planning permission (29.4%). This indicates, that whilst land planning alone cannot provide a comprehensive solution to the clearance of such sites, Policy OC7 does provide some opportunity to incentivise the removal of redundant glasshouses.

8.4 Redundant glasshouse sites - planning permissions

The types of development proposed on sites that include a redundant glasshouse is shown in **Figure 2**.

Figure 2: Type of development for change of use of redundant glasshouse sites to other uses.

Type of application	Number of applications							
	2017		2018		2019		2020	
	Approved	Refused	Approved	Refused	Approved	Refused	Approved	Refused
Conversion to dwelling including curtilage	1	-	5	1	1	1	3	1
Demolition of a redundant building	2	-	-	-	1	-	-	-
Domestic curtilage	3	-	11	-	7	1	4	3
Small scale storage/ industry	3	2	2	3	1	4	1	-
Leisure and recreation	-	-	-	-	-	-	1	-
Total	**9**	**2**	**18**	**4**	**10**	**6**	**9**	**4**

There continues to be a range of different types of development approved for redundant glasshouse sites. Since 2017, the largest proportion of approved planning applications relate to change of use to domestic curtilage.

A positive consequence of a change of use of a redundant glasshouse site to an alternative use in accordance with the IDP policy is that redundant glasshouses are conditioned to be removed as part of the planning permission. Policy OC7 does not intend to retain the glass to implement the permission on redundant glasshouse sites, however this can be done in exceptional and unique circumstances. In a minority of cases in 2019 and 2020 however the planning permission did not require the removal of the redundant glasshouse(s). In 2019 a 'minor departure' from the policies of the IDP under the Planning Law was used so that glasshouses could be retained for a temporary five-year period to be used as a packing shed for a community workshop. This was because the particular proposals provided a valuable community contribution which, because of the exceptional circumstances, did not set a precedent and complied with all other IDP policies. In 2020, a permission for an extension to domestic curtilage did not have a planning condition applied to remove the glass on the grounds that the glass was capable of use and of an appropriate size for domestic usage in accordance with IDP policy.

8.5 Clearance of redundant glasshouse sites to implement planning permissions

If implemented the approvals for 2019 and 2020 will result in the removal of approximately 2.8 hectares (17.1 vergées) of redundant glasshouses. Therefore, over the two years, this is approximately 3.7% of the total 75.5 hectares (460.7 vergées) (identified in the 2019 baseline exercise). In comparison, for 2017 and 2018 the combined figure is 4.28 hectares (26.1 vergées) of redundant glass to be cleared if planning permissions are implemented.

Criterion iv of Policy OC7 requires proposals to include the demolition and removal from the site of all glasshouses and ancillary structures which are not capable of being used in accordance with the relevant policies of the IDP. In some cases, it may be possible to re-purpose existing structures as part of the new use and any ancillary buildings which are structurally sound may also have potential to be converted to a new use in accordance with Policy GP16(A). Glasshouses are not considered permanent structures for the purposes of this policy.

The States has recognised, through adoption of the IDP, that land planning alone cannot provide a comprehensive solution to the clearance of such sites. Policy OC7 provides some opportunity to incentivise the removal of redundant glasshouses by allowing a change of use. However, it is recognised that this is limited and that a comprehensive solution across the States and with landowners is required. It will be important to continue to monitor to what extent glass is cleared as a result of planning policy and permissions to ensure the policies in the IDP continue to be flexible enough when determining redundancy of glasshouse sites in order to manage the decline of the horticultural industry.

INDICATOR

Clearance of redundant glasshouse sites to implement planning permissions.

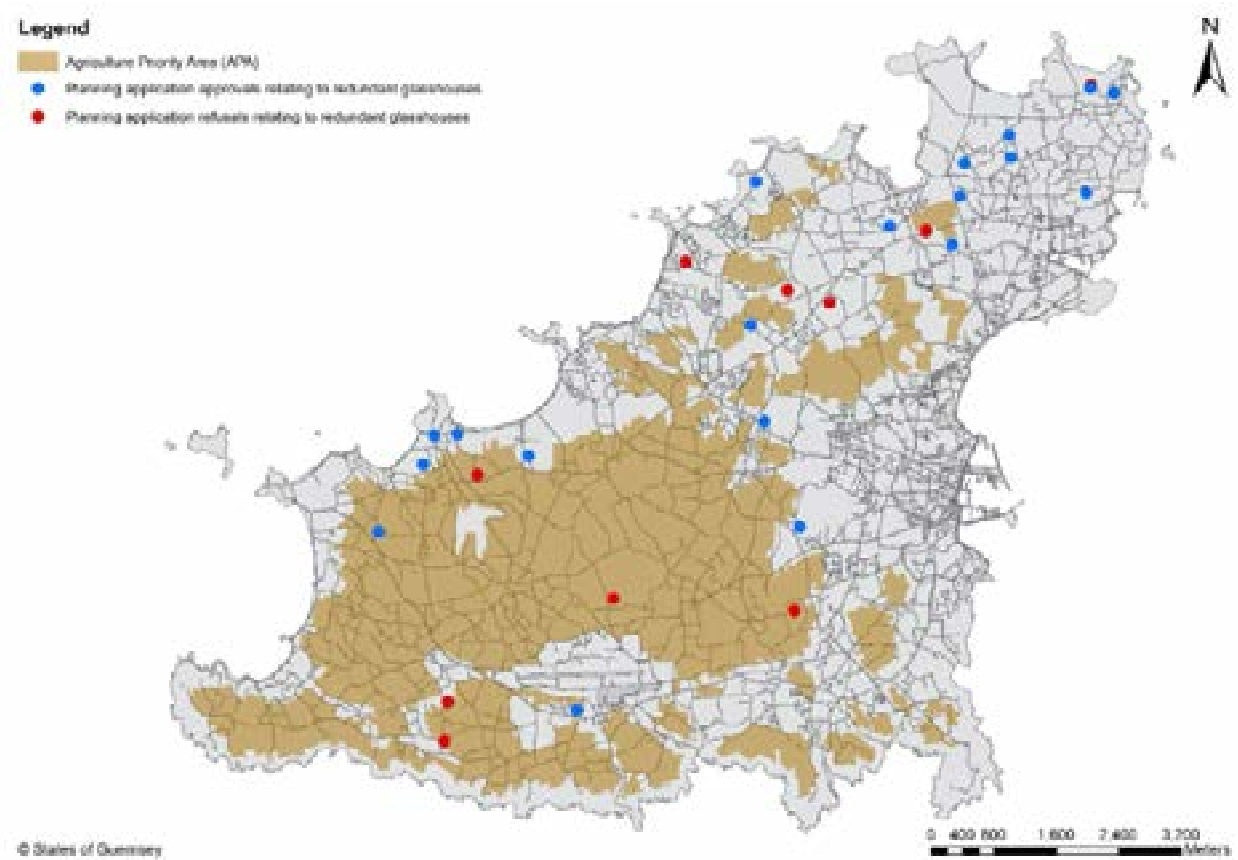
PROGRESS

Further monitoring of the implementation of the permissions is needed to determine the impact of the IDP policies on the extent of redundant glasshouses. 7 hectares of glasshouses are required to be cleared should the permissions given since the adoption of the IDP be implemented.

8.6 Location of the redundant glasshouse sites within or adjacent to the Agriculture Priority Area

Figure 3 shows the location of the applications for change of use relating to redundant glasshouse sites.

Figure 3: Location of planning applications for change of use relating to redundant glasshouse sites, 2019-2020.



Where a redundant glasshouse site is located within or adjacent to an APA it will be expected to be used for other agricultural purposes, once cleared, unless it is demonstrated that it cannot positively contribute to commercial agricultural use or cannot practically be used for commercial agriculture without unacceptable adverse environmental impacts. Where a redundant glasshouse site is located within or adjacent to a wider area of open land, once cleared, it will be expected to contribute to the wider area of open land where it is capable of positively doing so.

In 2019 and 2020, there was 1 application approved for change of use of a redundant glasshouse site within the APA and 1 refusal adjoining the APA. There were 5 refusals within the APA. The majority of applications were approved outside of the APA (18 applications) and 5 were refused outside of the APA. The approved application within the APA, was for the conversion of an ancillary structure to a dwelling including curtilage and, in this case, it was successfully demonstrated that the site could not contribute to the commercial function of the APA.

Planning policies have prevented the change of use of redundant glasshouse sites which are legally considered an agricultural use within and adjacent APA in cases where it cannot be demonstrated that the land will not positively contribute to commercial agricultural use or cannot practically be used for commercial agriculture without unacceptable adverse environmental so that agricultural use in the APA is prioritised where required in accordance with the IDP policies.

INDICATOR

Monitoring of planning applications relating to redundant glasshouse sites within and adjacent to the APA.

PROGRESS

The number of permissions within or adjacent to the APA to change use away from agriculture remains relatively low with 1 permission in 2017, 4 in 2018 and 1 permission in 2019/2020

8.7 Conclusion

Overall, the IDP policy (Policy OC7) provides some opportunity to incentivise the removal of redundant glasshouses by allowing a change of use. The monitoring also demonstrates that planning policies have prevented the change of use of redundant glasshouse sites, which are legally considered an agricultural use, within and adjacent to APA in cases where it cannot be demonstrated that the land will not positively contribute to commercial agricultural use or cannot practically be used for commercial agriculture without unacceptable adverse environmental impacts so that agricultural use in the APA is prioritised where required in accordance with the IDP policies.

It is also recognised that land planning alone cannot provide a comprehensive solution to the clearance of such sites. Whilst Policy OC7 provides some opportunity to incentivise the removal of redundant glasshouses by allowing a change of use, it is also recognised that this is limited and that a comprehensive solution across the States and with landowners is required.

Section 9
Natural Resources

9.1 Introduction

The SLUP states that the quality of Guernsey's natural environment is important, not simply for its inherent value, and for its contribution to quality of life but also its importance for social well-being and to the Island's economy. There are also areas of acknowledged and important biodiversity. The SLUP also emphasises the importance of climate change adaptation and mitigation.

The IDP incorporates a range of policies that seek to deliver the SLUPs objectives and policies, both at a spatial strategy level, directing development and concentrating it in more sustainable locations thereby protecting biodiversity and open land, and at a detailed level with policies to encourage resilience to climate change and use of renewable energy. The amount and type of development approved is monitored to inform future iterations of policy and any guidance.

The States' Strategy for Nature (2020) has been approved as Supplementary Planning Guidance. Progress with implementing the Strategy will be monitored through proposed 'State of the Nature Annual Reports' by the Committee for the Environment & Infrastructure. A range of indicators relating to the natural environment are monitored in the annual Guernsey Facts and Figures Booklet.

A number of States resolutions during 2019, 2020 and recovery actions in the Government Work Plan in 2021 relate to Natural Resources and will need to be taken into account in any future review of the IDP policies to ensure that the States priorities can be delivered. The resolutions include the Climate Change Policy & Action Plan and the Energy Policy 2020-2050. The Government Work Plan highlights that while there are critical actions identified to address immediate issues, work will also commence on the longer-term policy objectives already established on climate change and sustainability. The Government Work Plan includes recovery actions to develop both green and blue economy supporting plans that would in part be implemented using a biodiversity net gain planning tool.

9.2 Sites of Special Significance

There are 9 Sites of Special Significance (SSSs) designated in the IDP, covering 839 hectares, that have been identified as having outstanding botanical, scientific or zoological interest. Works that do not normally require planning permission, such as any works which disturb the ground, or significant clearance of vegetation where this would materially affect the special interest of a SSS, require planning permission in a SSS. In 2019 there were 21 planning applications permitted in SSSs and in 2020 there were 7. The types of development approved in SSSs is shown in **Figure 1** below. There continues to be a wide range of types of development approved in SSSs, which have not had significant implications for the special interest of the particular SSSs.

Figure 1: Type of development permitted in Sites of Special Significance (numbers of planning permissions)

	2017	2018	2019	2020
Works to existing building	2	2	3	1
Works to Martello Tower	2	2	-	-
Works to WW2 structure	1	-	-	-
Infrastructure	2	3	4	-
Temporary Site Hut	-	1	-	-
Storage Shed	-	1	-	-
Land Management	-	1	-	-
Bench	-	2	3	-
Interpretation Board	-	6	1	3
Event	2	1	1	-
Recreational Use	4	-	2	2
Landscaping	-	-	4	-
Domestic Curtilage	-	-	1	-
Defibrillator	-	-	1	-
Bus Shelter	-	-	1	-
Signage	-	-	-	1

In time it is the intention of the DPA to publish guidance for the whole or part of each SSS as Supplementary Planning Guidance (SPG). The aim of the guidance will be to help understanding of how best to avoid any negative impacts of development on the special interest of the SSS, to identify development that, if carried out in a specific manner, would not need planning permission and to identify the opportunities for enhancement of the area's special interest that might exist through development.

INDICATOR

Produce Supplementary Planning Guidance for the whole or part of each Site of Special Significance.

PROGRESS

Project paused pending the scope of work to be determined for the Government Work Plan recovery action for a Green Economy Supporting Plan.

9.3 Areas of Biodiversity Importance

Guernsey's most important sites for biodiversity are identified as SSSs and the planning legislation and policies in the IDP afford a high level of protection in these areas. There are, however, a number of other sites that do not have a sufficient level of special interest to be designated as a SSS but nevertheless contribute significantly to the biodiversity of the Island. The designation of Areas of Biodiversity Importance (ABI) is not intended to prevent development but provides a mechanism to offer a focus on biodiversity and some protection and enhancement of such sites when development proposals are being considered. Some of the ABIs support the special interest of a SSS by providing either natural buffers or wildlife corridors. There are 84 ABIs designated in the IDP including an ABI for the Foreshore (the part of the shore between the high and low water marks). 27 ABIs are related to SSSs. In total, the ABIs cover an area of 196 hectares.

8 planning applications for sites that includes land within an ABI were approved in 2019 and 7 in 2020. These related to the forms of development shown in **Figure 2.**

Figure 2: Type of development permitted in Areas of Biodiversity Importance (numbers of planning permissions)

	2017	2018	2019	2020
Erect building	2	-	-	1
Works to a building	-	1	-	1
Landscaping works	1	-	4	1
Extend curtilage	1	-	2	-
Infrastructure	-	4	-	-
Lifebuoy	-	2	-	-
Bus shelter	-	1	-	-
Public bench	-	1	-	1
Interpretation Board	2	2	1	1
Signage	-	-	-	2
Event	-	-	1	-

Further to commitments made at the IDP planning inquiry and in previous AMRs, the evidence base to support ABI designations is being updated. This includes retaining or removing existing designations, as well as proposing new ABI designations.

INDICATOR

Survey existing Areas of Biodiversity Importance and propose any new Areas of Biodiversity Importance.

PROGRESS

Project initiated. This project is due to be completed by the end of 2021.

9.4 Important Open Land

Areas of Important Open Land provide 'breathing space' in the built environment and provide visual amenity. The special qualities of these areas need to be protected from inappropriate development. Policies support development on land designated as Important Open Land only where it relates to new outdoor formal recreation or informal leisure and recreation or it relates to work to existing buildings or structures and subject to the impact of the development on the open character and visual or landscape character of the land.

There are areas of Important Open Land in the two Main Centres, Main Centre Outer Areas and the Local Centres at St Martin and St Pierre Du Bois. These areas are extensive within the Centres, as shown in **Figure 3** below.

Figure 3: Areas of Important Open Land in Main Centres and Local Centres and planning permissions granted

	Size of Centre (hectares)	Size of Important Open Land (hectares)	Important Open Land as a % of the Centre	Planning Permissions			
				2017	2018	2019	2020
St Peter Port Main Centre	**413.44**	**61.66**	**14.9%**	**8**	**14**	**4**	**10**
St Sampson / Vale Main Centre	**221.17**	**25.298**	**11.4%**	**2**	**1**	**2**	**1**
St Martin Local Centre	**33.27**	**5.051**	**15.2%**	**0**	**0**	**0**	**0**
St Pierre Du Bois Local Centre	**10.7**	**3.217**	**30.1%**	**0**	**0**	**0**	**0**

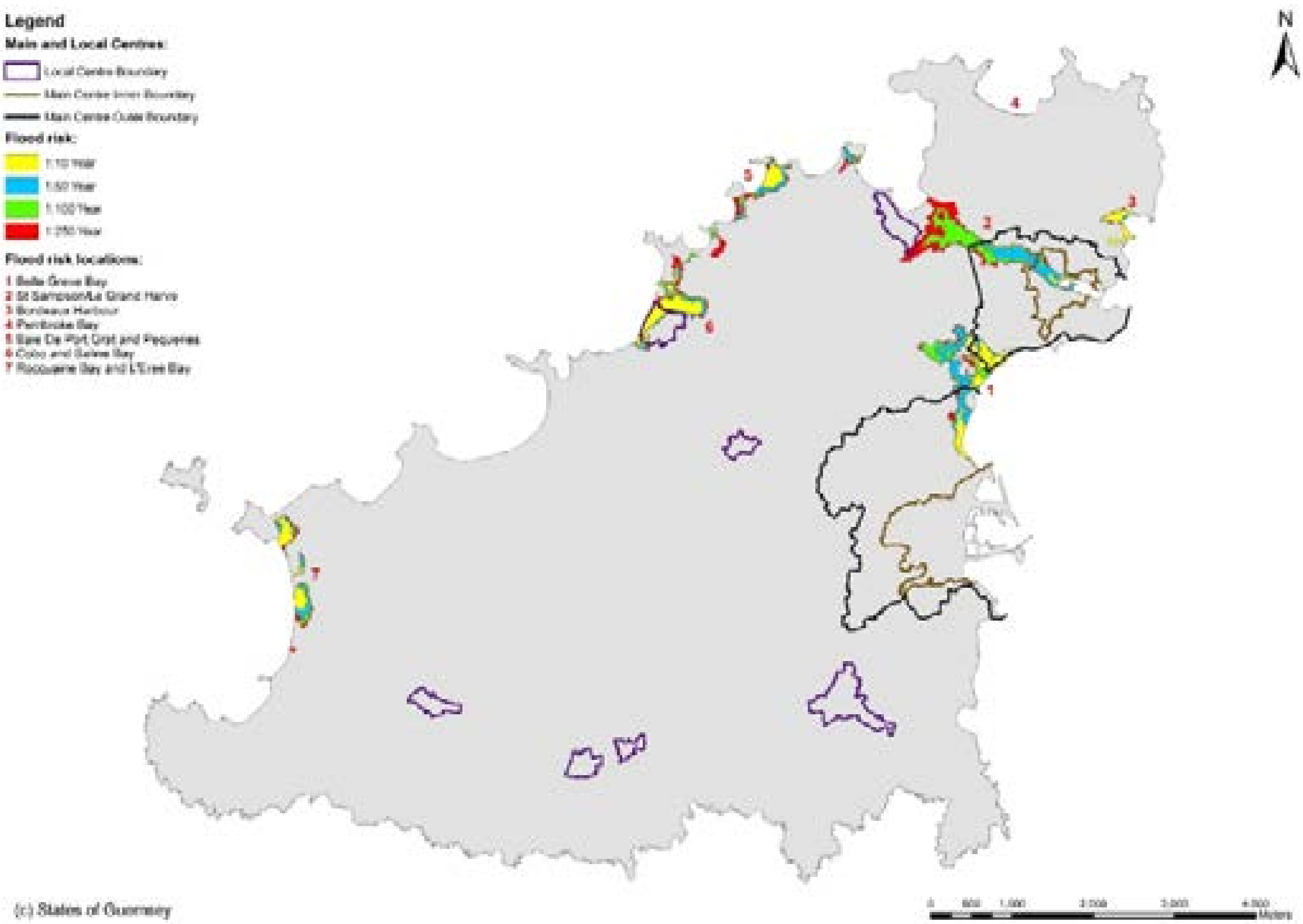
Planning permissions granted in 2019 and 2020 primarily related to works to existing buildings or landscaping work with the exception of electricity transformers and a switch gear room approved for Guernsey Electricity on land adjacent to Beau Sejour Leisure Centre following a detailed site selection process. The planning permissions figures reflect the fact that the Important Open Land in St Peter Port generally has more buildings within it, such as along St Peter's Valley.

9.5 Flood Risk

There are a number of lower lying areas in Guernsey which are vulnerable to flooding during present day extreme high tides. This vulnerability will increase with anticipated sea level rise. The Guernsey Coastal Defence Flood Studies and approved strategy, 2013 (Billet d'État XV, July 2013) identifies extensive flooding caused by tidal or storm surge as a key corporate risk and focuses priority for capital works in the areas of St Sampson's Harbour and Belle Greve Bay. A Government Work Plan recovery action to develop and agree a 'Bridge Strategy' will include co-ordinated action on long-term solutions for the Bridge including in relation to flooding and coastal defences at St Sampson's Harbour. A strong interdependency is noted with any decision on the use of the Leale's Yard Regeneration Area adjacent to the Bridge. The flood risk identified in Belle Greve Bay has implications for the development of the Belgrave Vinery housing allocation site.

The Flood Risk Assessment Studies have identified coastal areas within Guernsey considered to be at risk of flooding from 1 in 10, 50, 100 and 250 year coastal flood events as at 2012 see **Figure 4** below.

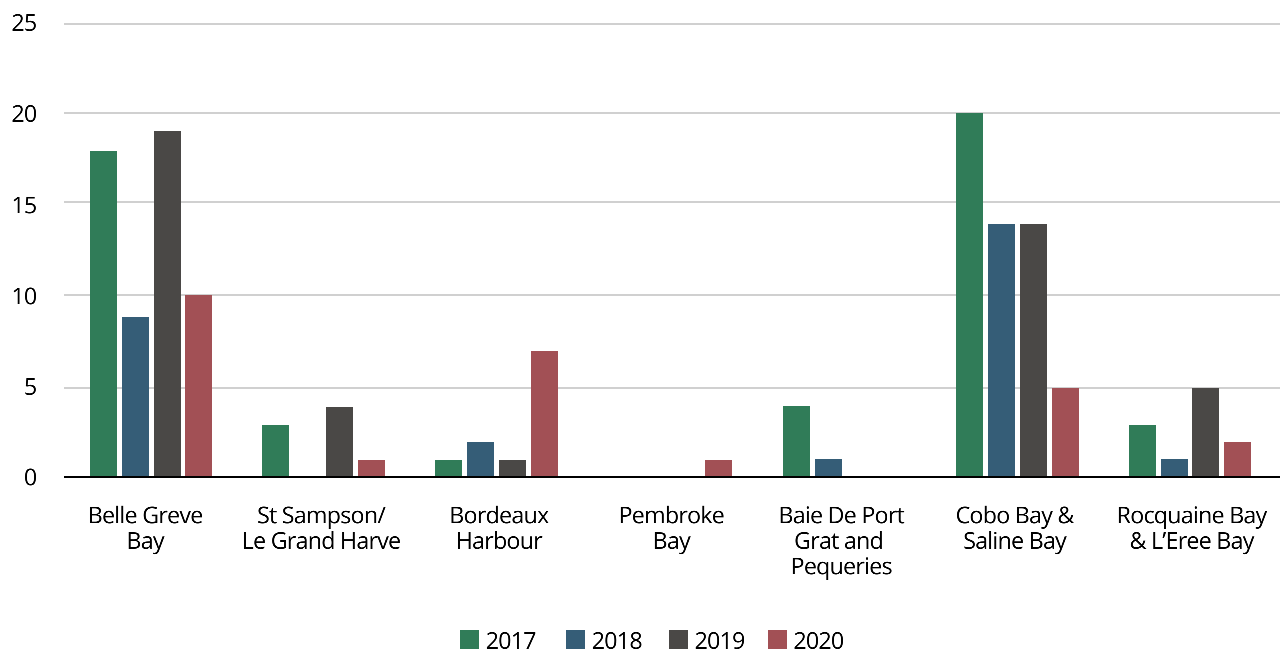
Figure 4: Flood risk areas



IDP Policy GP9: Sustainable Development requires development to be designed to take into account a building's resilience to climate change and flooding and include drainage solutions to address and, where necessary, mitigate any unacceptable increase in flood risk as a result of the development proposed.

Planning permissions in the 1:10 year flood risk areas, the areas most liable to flooding, are monitored – see **Figure 5.** The majority of development approved within the 1:10 year flood risk areas has been in those areas adjacent to Belle Greve Bay and Cobo/Saline Bay reflecting the level of existing development in those areas. The majority of the development approved was for works to existing buildings.

Figure 5: Planning permissions in the 1:10 flood risk area



9.6 Renewable Energy

Renewable generation of power is achieved by means such as the harnessing of energy from wind, tidal, wave, biomass or solar sources. 12% of the energy supplied to Guernsey consumers in 2019 was derived from nuclear or renewable sources, compared with 20% in 2018, the reduction due to a cable fault. In 2019, total energy consumption decreased by 4% from 2018 (source: Guernsey Facts and Figures, 2020). The Government Work Plan identifies the importance of renewable energy for the Island's resilience. The potential for marine renewables is an issue for the proposed Blue Economy Supporting Plan to consider. Renewables can help to deliver the States' zero emissions target by 2050 or sooner. A recovery action is to develop a licensing framework for targeted competition to support the establishment of on-island (including territorial seas) renewables.

IDP Policy IP1: Renewable Energy Production supports proposals for installations for the harnessing of renewable energy. During 2019 and 2020 there were no planning applications to produce energy on a commercial basis from renewable sources. IDP Policy GP9: Sustainable Development requires proposals for new development, and the refurbishment, extension and alteration of existing buildings, to be designed to take into account the use of energy and resources. The policies of the IDP support the delivery of the Energy Policy in particular in relation to greater energy independence, consumer choice and decarbonisation. Planning permissions to incorporate renewable energy equipment into the built form of an existing or proposed development are shown in **Figure 6** below.

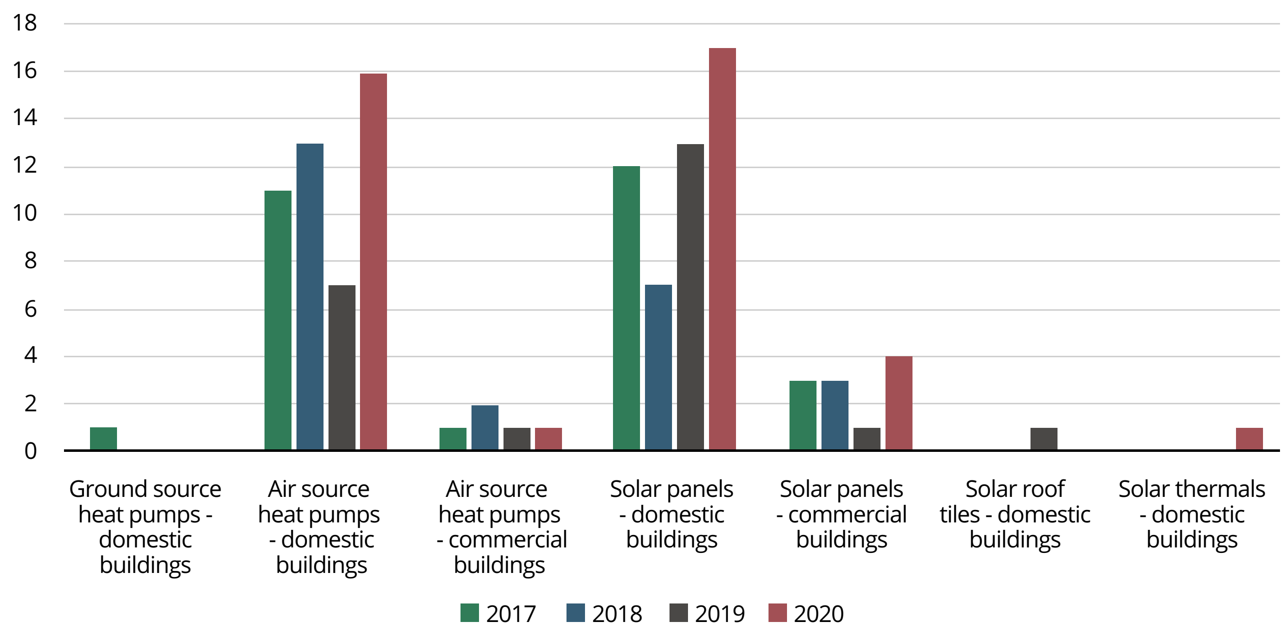
INDICATOR

Increase the supply of energy through renewable sources.

PROGRESS

These permissions remain a small portion of the planning applications submitted each year. The effectiveness of the IDP policies to support the delivery of the Energy Policy to be reviewed in the next monitoring period and in any future review of the IDP policies.

Figure 6: Planning permissions for renewable energy equipment



9.7 Conclusions

There are a number of Government Work Plan recovery actions that relate to natural resources. These will need to be reviewed in future monitoring to consider whether the policies of the IDP that relate to natural resources remain appropriate to support the Government priorities. They will also need to be taken into account in any future review of the IDP policies. In addition, the Climate Change Policy & Action Plan, the Energy Policy 2020-2050 and the Strategy for Nature (2020) will be reviewed to ensure that the policies of the IDP fully support delivery. The proposed green and blue economy supporting plans would in part be implemented using a biodiversity net gain planning tool. This will likely need to be reflected in the IDP policies. At present, there is a lack of evidence to reach any conclusions as to whether the policies of the IDP for natural resources are effective in protecting areas sensitive to change from inappropriate development. It is anticipated that the Government Work Plan priorities will provide better information.

Section 10
Construction Waste

10.1 Introduction

The SLUP emphasises the importance of sustainable development, climate change mitigation, waste mitigation and sustainability in design and construction. This is reflected in linking policies LP1, LP2, LP3 and LP4. These policies are supported by the Solid Waste Strategy which was adopted by the States in 2012. A policy letter entitled "Planning for a New Facility for Managing Residual Inert Waste" was approved on 24th April 2020, along with the Inert Waste Strategy. This directs the DPA to prepare proposals for a Local Planning Brief for a new residual inert waste facility at Longue Hougue South and to direct the DPA and the Committee *for the* Environment & Infrastructure to take all necessary steps under the Land Planning legislation to lay such proposals before the States for adoption and remains extant.

The Climate Change Policy & Action Plan was approved by the States in August 2020. This legislates the target objective for the island's emissions as set by the Energy Policy 2020-2050, sets the scope of emissions to be included and the hierarchical approach to be applied to reduce emissions, in order to mitigate or compensate climate change impact.

The policies of the IDP support the policy direction of sustainability and climate change mitigation as directed by the SLUP and Climate Change Policy and Action Plan. Plan Objective 1 of the IDP sets out the importance of achieving and promoting sustainable development by requiring development to make the most effective and efficient use of land and resources whilst meeting the strategic objectives of the SLUP.

Policy GP9: Sustainable Development of the IDP promotes the provision of sustainable development. Developments, including new and refurbishment, extension and alteration of existing buildings will be supported where it has been demonstrated that the design of the development is sustainable, including the form of construction, orientation and materials used; also, Policy GP8 expects all developments, including commercial uses and multiple new dwellings to be designed in such a way that they provide adequate individual or communal areas for storage of refuse and recyclable materials. Policy GP9 also sets out when a Site Waste Management Plan (SWMP) is required. These requirements are also contained within Policies MC2, LC2, OC1, GP13, GP16(A) and GP16(B).

The IDP encourages the consideration of the reduction of construction waste at the earliest stages of the design process and throughout the pre-construction and construction phases of development through a requirement for the submission of a SWMP with planning applications for certain development. These are the demolition and rebuilding of dwellings on a one for one basis, or the demolition and rebuild of redundant buildings or dwellings which have planning permission to be subdivided or where development is for 5 or more dwellings or for any development of a minimum of 1,000 square metres of floor area.

A SWMP Planning Advice Note was published in June 2018 and is available here: https://www.gov.gg/planning_building_permissions.

Figure 1: Planning applications that submitted a SWMP based on type of development[10]

Type of Application	Number of Applications			
	2017	2018	2019	2020
Demolition and replacement of dwellings	7	23	18	25
Demolition and redevelopment of a redundant building	1	2	6	3
Five or more dwellings	3	8	7	8
Subdivision	0	1	1	0
Over 1,000m²	2	0	5	2
Total	**13**	**34**	**37**	**38**

There were 76 planning permissions in 2019 and 93 in 2020 for residential development. Approximately 49% (2019) and 41% (2020) of these permissions were required to submit a SWMP.

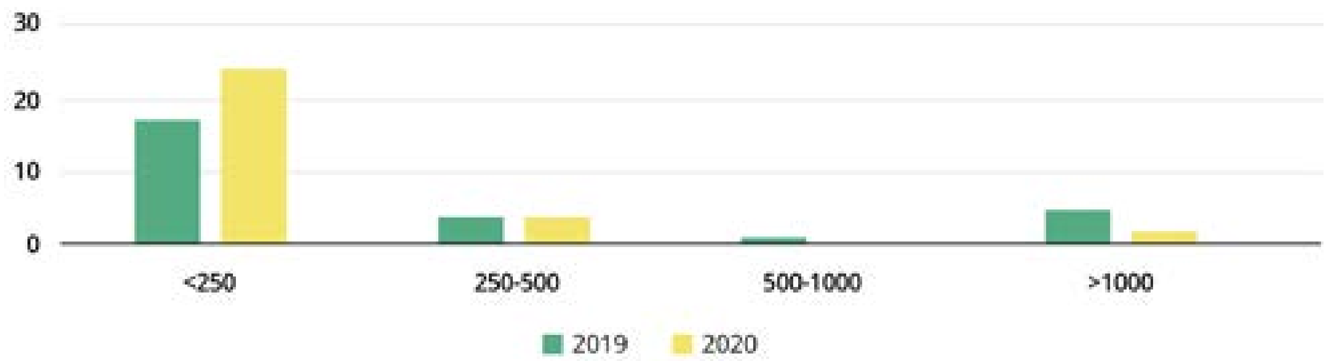
The number of applications submitting a SWMP has steadily increased since 2017. In 2019 and 2020, the majority of planning permissions that submitted a SWMP were for replacement dwellings on a one for one basis (57%) and the smallest percentage was for subdivision (1%).

There were 27 planning permissions (2019) and 30 planning permissions (2020) for office, industry and storage uses. In 2019 and 2020, there was a combined total of 7 permissions with a floorplate over the 1000m² threshold– see **Figure 2** below. Of the other applications that were not required to submit a SWMP because the floorplate was below the 1000m² threshold, only 5 involved demolition.

The Authority must ensure that the thresholds for developments requiring SWMPs are set at an appropriate level in order to capture the developments most likely to involve demolition and therefore result in inert waste arising from the development. The extent of inert waste should be captured in order to discover any barriers to waste minimisation and reduce the quantity of materials that are sent to landfill.

10 Please note that a comprehensive review was undertaken in 2019 of the SWMP data and a new database was established.

Figure 2: Floorplate sizes of office, industry and storage planning permissions, 2019 and 2020.



The requirement for producing SWMPs does not include planning applications for the construction of a single dwelling (that is not a 1-for-1 replacement) or for residential developments for 2-4 new units[11].

There were 18 planning permissions granted in 2019 through until the end of 2020 for developments resulting in a net increase of 2-4 dwellings (excluding change of use applications and revised schemes). This represents approximately 11% of the planning permissions for residential developments during that time. 8 of the planning permissions involved the demolition of buildings. Over time and particularly because a lot of development in Guernsey is small scale, this could still result in a significant proportion of data regarding construction waste not being captured.

11 Unless it is for the demolition and rebuild of redundant buildings or dwellings which have planning permission to be subdivided

INDICATOR

Proportion of planning applications for residential development requiring a Site Waste Management Plan.

PROGRESS

A similar proportion each year (2017-2020) have been required to submit a Site Waste Management Plan. A greater level of data could be captured, and this is an issue to consider in any review of the IDP.

10.2 Planning Conditions

As SWMPs are intended to be living documents, the information should be recorded continuously throughout a project. In order to ensure this information is captured there are often conditions attached to planning permissions when a SWMP is required. The information required is proportionate and there are a number of different planning conditions which are applied on a case-by-case basis.

In total, 97% of planning applications that received permission in 2019 and 2020 and required a SWMP, had conditions attached to the planning permission (increased from 62% in 2017). This ensures that information is captured prior to the commencement of the development, prior to occupation of the development or within three months post completion.

All of the conditions regarding construction waste that are attached to planning permissions, require the submission of further information to the Authority regarding their SWMP.

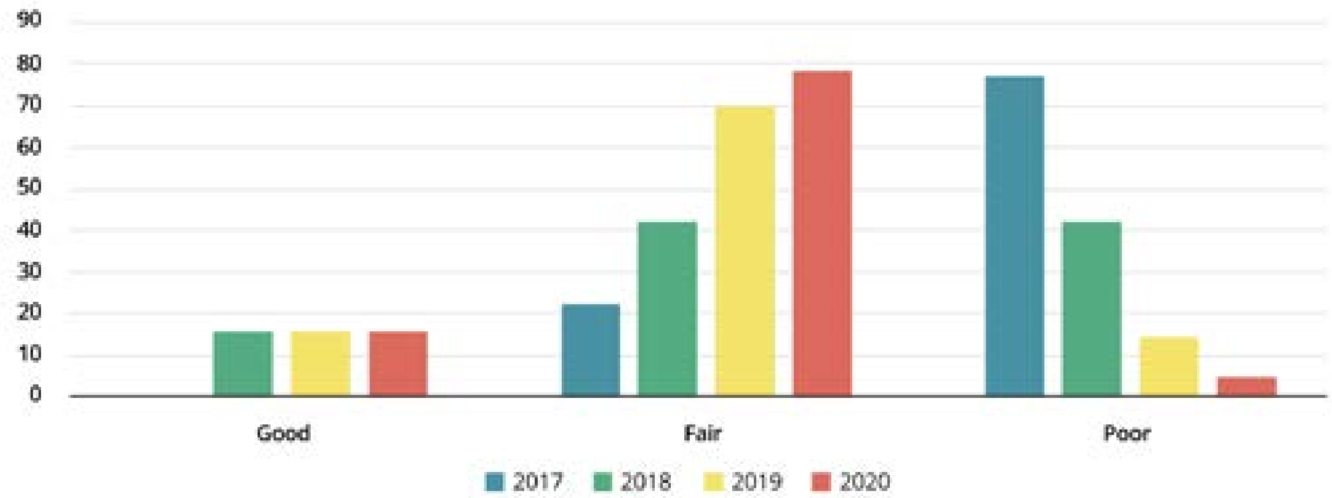
In total, 17% of planning permissions during 2019 and 2020 required the submission of further information prior to the commencement of works on site.

To date 9 updated SWMPs have been received since 2017, this is 50% of planning permissions that required the submission of further information prior to occupation of the site. This is lower than expected, however at present there is insufficient data to draw any long-term trends, but it will be important to continue to monitor the effectiveness of planning conditions relating to SWMPs.

Since 2017, 14 developments that required a SWMP have completed construction, out of these applications 6 post construction SWMPs have been submitted. At this stage there is insufficient data to draw any conclusions from the data, however it is anticipated that there will be more data to analyse and draw comparisons from pre-construction and post-completion submissions in the near future. This will ensure that any assumptions made at that time are corrected to reflect what has been found on the ground.

10.3 Quality of Submissions

Figure 3: Percentage of planning permissions that submitted a SWMP based on quality



As SWMPs are intended to be living documents, the information should be recorded continuously throughout a project. In order to ensure this information is captured there are often conditions attached to planning permissions when a SWMP is required. The information required is proportionate and there are a number of different planning conditions which are applied on a case-by-case basis.

In total, 97% of planning applications that received permission in 2019 and 2020 and required a SWMP, had conditions attached to the planning permission (increased from 62% in 2017). This ensures that information is captured

Figure 4: Percentage of planning permissions that submitted a SWMP based on quality

Quality	SWMP guidance template not used		SWMP guidance template used	
	2019	2020	2019	2020
Good	0%	17%	23%	16%
Fair	73%	66%	69%	81%
Poor	27%	17%	8%	3%
Total	**100%**	**100%**	**100%**	**100%**

The quality of submissions needs to be standardised and whilst the publication of the Advice Note has resulted in the improvement of submissions generally, there are still submissions that are not up to standard. Whilst SWMPs are intended to be proportionate to the type of development proposed, when considering the submissions so far, there has been variation in the level of information required for different scales of development. The Advice Note will be kept under review to determine if further information regarding the scale of developments and the type of information expected is required.

10.4 Conclusions

At present the policies of the IDP referenced above remain fit for purpose to deliver the SLUP, the Waste Strategy, Inert Waste Strategy and the Climate Change Policy & Action Plan. A similar proportion of planning applications each year (2017-2020) have been required to submit a SWMP. A greater level of data could be captured, for example for the construction of a single dwelling (that is not a 1-for-1 replacement) or for residential developments for 2-4 new units, and this is an issue to consider in any review of the IDP. The number of planning permissions that require the submission of further information prior to occupation of the site is lower than expected, and it is anticipated that there will be more data to analyse and draw comparisons from pre-construction and post-completion submissions in the near future. However, at present there is insufficient data to draw any long-term trends on these aspects. There is some emerging evidence to suggest that quality of submissions needs to be standardised and whilst the publication of the Advice Note has resulted in the improvement of submissions generally, there are still submissions that are not up to standard.

Section 11

Conclusions

11.1 Conclusions

The AMR for 2020 has found that the IDP policies are generally performing as intended and contributing towards delivering the SLUP and therefore, at this time, there is no immediate requirement to amend the IDP and there is no evidence of a need to amend the SLUP.

In 2019 and 2020 there was a high rate of approval of planning applications (only 131 applications were refused out of 3,081 applications determined, representing 4.3% - a small increase from 2018) and only 4 appeals against refusal of planning permission were decided during 2019/2020, 2 of which were allowed and 2 dismissed. This illustrates how the positive and flexible policies of the IDP, along with encouragement of high-quality pre-application discussions (1,500 pre application enquires were answered in 2019/2020), have enabled positive outcomes to be reached for the vast majority of planning applications, and potentially costly appeals avoided.

The AMR has identified a small number of issues where emerging trends need to be kept under review, including, in some instances, the need for further research prior to any future review of the IDP. These issues include:

- » The implications for the IDP of any future States decisions regarding air links and the supply of aggregates
- » Any changes to the States Strategic Housing Indicator
- » The decreasing level of permissions for Affordable Housing
- » The implications for the spatial strategy of the level of housing development Outside of the Centres
- » Developing a better understanding of the optimum office portfolio
- » The implications for the spatial strategy of the level of Industry, Storage & Distribution development Outside of the Centres
- » The implications for the IDP of the proposed new tourism plan for policies that relate to visitor accommodation and the tourism offer
- » Applications for the change of use from agricultural land (but not necessarily actively farmed land) to domestic garden and the need for a revised figure of land required by the commercial agricultural industry to support the industry long-term
- » The potential for a biodiversity net gain planning tool to implement the proposed green and blue economy supporting plans
- » Capturing a greater level of data on construction waste through Site Waste Management Plans, in particular for certain residential developments.

In the previous AMRs, a number of issues were identified where action was needed. Many of these actions have been resolved (see Appendix 1) including for example the publication of guidance, such as for Development Frameworks.

The IDP was approved by the States in 2016 and has a 10-year lifespan. Although there is regular monitoring throughout its life, the IDP sets out that there will be a review of housing land supply and employment land supply after five years, unless monitoring indicates a more urgent need to review the land supply sooner. The Authority took a policy letter to the States in April 2020 to set out an increased scope to the 5-year review of the IDP, taking into account the findings of the 2017 and 2018 AMRs and feedback from the States on the IDP.

The States resolved that the scope of the review of the IDP should include:

- housing land supply and employment land supply;
- Areas of Biodiversity Importance and the protection given to the biodiversity interest of such areas as part of the review;
- Development Frameworks thresholds and process (N.B. the thresholds were amended by the Authority in 2021);
- development of greenfield land and prioritisation of brownfield land for residential purposes in Centres;
- Important Open Land;
- Agriculture Priority Areas, giving particular consideration to small-scale, sustainable farming projects and local growing initiatives;
- visitor accommodation.

As a result of the emergence of the COVID-19 pandemic, the States resolved to pause the 5-year review so that it could review the scope of, and priorities for, the 5 year review of the IDP and to incorporate the government's priorities for the Island's recovery. This pause has been beneficial given the new priorities that have now been established in the Government Work Plan (July 2021). The implications of these new priorities for the IDP need to be reviewed to ensure that the IDP fully supports the government priorities. Emerging strategies, projects and policy decisions will require to be closely monitored to assess whether this would necessitate commencing a review of the IDP, in advance of the replacement of the IDP in 2026. The Government Work Plan actions of particular relevance to land use planning are for:

- Regeneration including the eastern seafront, Regeneration Areas in Town and Leale's Yard, and the Bridge Strategy;
- Unlocking enterprise including the potential for 'enterprise zones';
- Housing, including supporting the work of the Housing Action Group, development of Affordable Housing and the States Strategic Housing Indicator;
- Sites for waste, water and stone, including the future use of Les Vardes quarry, Chouet Headland and Longue Hougue South;
- Tourism and any changes in approach to visitor accommodation sites and heritage tourism;
- A range of proposed construction projects such as the future Guernsey Dairy;
- Planning the future use of sites of a significant scale that may become available; and,
- Supporting plans for the green and blue economies and introduction of a biodiversity net gain planning tool.

In addition, States approved policies such as the Climate Change Policy & Action Plan and the Energy Policy 2020-2050 will need to be taken into account.

Thank you for reading this Island Development Plan Annual Monitoring Report. Further information on planning in Guernsey is available here: www.gov.gg/planningandbuilding

Appendix 1

Actions and Monitoring Requirements - Update

The table in this section is an update to the actions and monitoring requirements identified within the 2018 Annual Monitoring Report (AMR). In many cases the actions / requirements relate to ongoing work. Page numbers relate to 2018 AMR.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Strategic Development and Infrastructure	
The Authority to work closely with, and be an intrinsic part of, the SEA group to help deliver the Local Planning Brief(s) (or other appropriate mechanism(s)) for the Seafront Enhancement Area (p. 16).	This action will be reviewed in the next AMR in light of the States resolutions in relation to the Government Work Plan.
The Authority to work closely with, and be an intrinsic part of, the SEA group to help deliver the Local Planning Brief (or other appropriate mechanism) for the St Peter Port Harbour Action Area (p. 16).	As above.
The Authority to work closely with, and be an intrinsic part of, the SEA group to help deliver the Local Planning Brief (or other appropriate mechanism) for the St Sampson's Harbour Action Area (p. 17).	As above.
The Authority to investigate options to progress Development Frameworks for Lower Pollet and Le Bordage/Mansell Street Regeneration Areas and complete work on the Development Framework for South Esplanade and Mignot Plateau (p. 19).	A Development Framework for the 3 Regeneration Areas in St Peter Port has been progressed and a draft has been published for public consultation at the time of writing.
Review progress with the Lower Pollet, Le Bordage/Mansell Street and South Esplanade and Mignot Plateau Regeneration Areas in future monitoring (p. 19).	This action is ongoing.
Review progress of the Leale's Yard Regeneration Area in future monitoring (p. 20).	Development Framework for Leale's Yard approved in 2020.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Should the full planning permission for Leale's Yard lapse in 2019, the Authority to commence a Development Framework for the Leale's Yard Regeneration Area (p. 20).	A Development Framework for Leale's Yard was approved by the Development & Planning Authority in May 2020.
Housing	
Joint working between the Development & Planning Authority, the Committee for Employment & Social Security (whose mandate includes delivery of Affordable Housing), the Committee for the Environment & Infrastructure and the Policy & Resources Committee in order to implement the 'Programme of Works' endorsed by the States following the debate of the Policy Letter 'Local Market Housing Review and Development of Future Housing Strategy' in July 2018, particularly in relation to the monitoring of housing supply and need and the establishment of an appropriate data collection model and data collection processes (p. 26).	Joint working between the Development & Planning Authority, the Committee for Employment & Social Security (whose mandate includes delivery of Affordable Housing), the Committee for the Environment & Infrastructure and the Policy & Resources Committee in order to implement the 'Programme of Works' endorsed by the States following the debate of the Policy Letter 'Local Market Housing Review and Development of Future Housing Strategy' in July 2018, particularly in relation to the monitoring of housing supply and need and the establishment of an appropriate data collection model and data collection processes (p. 26).
The Development & Planning Authority to regularly liaise with the Committee for Employment & Social Security at an officer and political level to update on progress with the larger housing sites (p. 51).	This action is ongoing and liaison continues to take place.
Offices	
Development & Planning Authority to continue to liaise with the Committee for Economic Development and the Policy & Resources Committee at an officer level in order to support further work that may arise from the implementation of the recently approved States Economic Development Strategy, particularly on the monitoring of our economy (p. 60).	Elements of the States' Economic Development Strategy incorporated into the priority actions of the Government Work Plan. This action is ongoing, and liaison continues to take place.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Offices cont.	
Development & Planning Authority to continue to monitor delivery of the office accommodation within the Office Expansion Area and review the need to prepare a Development Framework for the Office Expansion Area in 2019 (p. 65).	Following commencement of works at Admiral Park site which represents over half of the available land within the Office Expansion Area, the Authority does not envisage the need to prepare a Development Framework at this time.
Continue to monitor the number of cases where applications for a use similar to office use are permitted as a minor departure to the IDP policies, reflecting the changing nature of businesses requiring office accommodation. If this rises, the Development & Planning Authority will need to reconsider whether an amendment to policy is required (p. 66).	No recent cases. No further action required at this time.
Monitor the changing nature of business and appropriateness of use classes and policy (p. 66).	No further action required at this time.
Development & Planning Authority to liaise with the Committee for Economic Development at officer level and commercial agents and industry representatives to assess the recommended portfolio set out by the ELS (2014) together with other existing stock within the Main Centres against the criteria for quality. Further analysis of whether this is an appropriate range of accommodation to meet business needs can then be undertaken with the Committee for Economic Development. This research should then inform the 5 year review of employment land supply and any requirement to amend planning policies (p. 68).	This action is ongoing and liaison continues to take place. In 2020, the Authority commissioned Watts Property Consultants Ltd to prepare an Office Quality Audit. Following consultation with stakeholders, the report provides a definition of primary, secondary and tertiary office accommodation in Guernsey and an assessment of the quality of the existing stock within St Peter Port Main Centre. Further analysis of whether this is an appropriate range of accommodation to meet business needs now needs to be undertaken with the Committee for Economic Development. This research should then inform the full review of IDP (2016) and any requirement to amend planning policies.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Offices cont.	
Monitor the subdivision, vacancy levels and availability to the market of large scale premises (p. 75).	No longer undertaking the marketed premises audit.
Development & Planning Authority at an officer and political level to seek / encourage delivery of new high quality office accommodation in the development of the Office Expansion Area, Regeneration Areas and Harbour Action Areas that is adaptable to suit a range of businesses (p. 75).	This action is ongoing and liaison continues to take place.
Industry, Storage & Distribution	
The Development & Planning Authority to continue to liaise with the Committee for Economic Development and Policy & Resources Committee at an officer level in order to support further work that may arise from implementing the approved States' Economic Development Strategy, particularly on the monitoring of our economy (p. 80).	This action is updated to reflect the development of the Government Work Plan. This action is ongoing, and liaison continues to take place.
The Development & Planning Authority to continue dialogue with the Committee for Economic Development to discuss the needs of creative industries and other emerging sectors through creation of an officer level working group (p. 86).	This action is ongoing and liaison continues to take place.
Continue to incorporate the supply of States' owned land for such uses into monitoring (p. 88).	This action is ongoing and liaison continues to take place.
Further investigation into the extent and nature of employment development occurring Outside of the Centres to ensure that policies continue to deliver the Spatial Strategy. This should form part of the scheduled 5 year employment land supply review (p. 90).	This action ongoing and should be updated to inform the full review of the IDP (2016).

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Industry, Storage & Distribution cont.	
The Development & Planning Authority should consider the impacts of increasing the threshold for exemptions from planning permission alongside a review of the full impact and benefits of the changes to the exemptions and the rationalisation of uses within the Use Class Ordinance, 2017 to inform the 5 year review of employment land supply (p. 91).	Review of exemptions ongoing.
Continue to monitor availability within Key Industrial Areas both 'for sale' and 'for let' (p. 92).	No longer undertaking the marketed premises audit.
Visitor Accommodation	
The Development & Authority to liaise with the Committee for Economic Development at both officer and political levels in the analysis of the implications of a potential change to IDP visitor accommodation policies introducing a more flexible approach (p. 101).	This action will be reviewed in the next AMR in light of the States resolutions in relation to the Government Work Plan and the proposed Tourism and Accommodation Strategy.
The Development & Authority will liaise with the Committee for Economic Development at officer level to review the potential and need to amend the Supplementary Planning Guidance where this is possible within the context of the IDP policies (p. 101).	As above.
Trends in occupancy levels of visitor accommodation may be included in future AMRs depending on the outcome of the States' debate on the Tourism Strategy (p. 102).	As above.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Agriculture and Horticulture	
Publication of Supplementary Planning Guidance on applying for planning permission in the Agriculture Priority Area in order to assist applicants and agents (p. 162).	List of considerations published on the States' website for development within Agriculture Priority Areas which is not for agricultural purposes.
Analysis of the 2018 Habitat Survey data to provide comprehensive data on land use, including that within the APA, and including agricultural, horticultural and undeveloped land (p. 162).	Analysis complete.
Continued liaison with the Committee for the Environment & Infrastructure at officer level regarding agricultural land use requirements and aspirations of the agricultural industry (p. 169).	Ongoing – ACLMS currently gathering data on agricultural requirements.
Continued monitoring of planning applications outside the APA that relate to agricultural/open land and horticulture (p. 169).	Complete to end of 2020 via AMR.
Continue to monitor approvals and refusals within the APA to identify trends and ensure that sufficient land remains available for agricultural use (p. 161).	Complete to end of 2020 via AMR.
Continued monitoring of extensions of domestic curtilage and the quality of new developments, noting residential amenity space (indicators currently being devised) (p. 169).	No update relating to residential amenity space and quality of design indicators. Monitoring of change of use of land to domestic gardens complete to end of 2020 via AMR.
Consider review of wording of Policy GP15: Creation and Extension of Curtilage in relation to the issues raised by the Appeals Panel when the IDP is reviewed (p. 156).	Paused until plan review.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Agriculture and Horticulture cont.	
At the point of review of the IDP, consideration to be given to amending the wording of Policy GP1: Landscape Character and Open Land and GP15: Creation and Extension of Curtilage within the policy summaries section, to clarify the land management function of agriculture, to align this with the main policy texts (p. 169).	Paused until plan review.
At the point of review of the IDP, ensure that the wording of the policy summary of Policy GP15: Creation and Extension of Curtilage is clarified to align this with the main policy text where it relates to small parcels of land which are not visually prominent (p. 169).	Paused until plan review. Any change to align with the Government Work Plan. In addition, at the point of review of the IDP, ensure that the Policy GP15: Creation and Extension of Curtilage is aligned with the Strategy for Nature SPG 2020, which requires proposals to achieve a positive biodiversity net gain.
Continued monitoring of the changing needs of the dairy industry (including possible requirements to grow more grain and fodder crops) (p. 172).	Ongoing via officer level discussion with ACLMS.
Continued monitoring of land farmed by dairy farmers relative to APA designation, including any losses of tenanted agricultural land outside the APA (p. 172).	Land farmed by dairy farmers monitored via data supplied by ACLMS. No current methodology to record losses of tenanted land but may be possible in the future if required.
Continued analysis of mapping data showing dairy farmed land (p. 172).	Ongoing via data supplied by ACLMS.
At the time of a full review of the IDP it is intended to combine 5 years information on land in active dairy farm use to inform an updated APA (p. 174).	ACLMS currently digitising mapping data to inform our analysis.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Agriculture and Horticulture cont.	
That the Development & Planning Authority continues to liaise with the Committee for Economic Development at officer level over horticultural issues as appropriate, but particularly in connection with the potential establishment of CBD businesses as outlined above (p. 173).	No update.
Continued monitoring of the nature of applications relating to horticultural proposals (p. 173).	Complete to end of 2020 via AMR.
Continue to gather accurate data on factors affecting the APA designation (p. 175).	Ongoing via liaison with ACLMS and analysis of planning service data.
Redundant Glasshouse Sites	
To maintain and regularly update and refine the redundant glasshouse baseline (p. 178).	Complete to end of 2020 via AMR. The next update of the baseline will coincide with the aerial photograph received by Digimap (every 3 years).
Liaison at staff level with the Committee for the Environment & Infrastructure regarding the identification of redundant glasshouse sites with particular biodiversity interest (p. 184).	No update.
Continued monitoring of planning permissions for change of use of redundant glasshouse sites (p. 184).	Complete to end of 2020 via AMR.
The Development & Planning Authority to continue to liaise with the Committee for the Environment & Infrastructure at an officer level in relation to the development of the Energy Policy and to monitor any likely impacts this emerging policy may have on the number of planning applications relating to change of use of redundant glasshouse sites for renewable energy (Policy IP1) (p. 184).	This action will be reviewed in the next AMR in light of the States resolutions in relation to the Government Work Plan (following debate in July 2021) in relation to the States of Guernsey Energy Policy 2020-2050.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Redundant Glasshouse Sites cont.	
To continue to monitor the clearance of redundant glasshouse sites following planning permission to determine which sites have been cleared from the baseline as a result of planning permission being granted (p. 185).	Complete to end of 2020 via AMR.
The Development & Planning Authority continue to liaise with the Committee for Economic Development at an officer and political level with regards to information on the small number of commercial glasshouse operations and the level of resources allocated to the horticultural census (p. 186).	This action will not be carried forward as the Committee for Economic Development has confirmed that it will no longer be in a position to carry out the horticultural census in the future.
Continued monitoring of planning applications relating to redundant glasshouse sites within and adjacent to the Agriculture Priorty Area (p. 188).	Complete to end of 2020 via AMR.
Natural Resources	
Review the findings of Guernsey Habitat Survey when complete (p. 192).	This has taken place and the Habitat Survey is a consideration in the determination of planning applications. The survey will also inform any review of the IDP.
Progress the project to produce Supplementary Planning Guidance for the whole or part of each Site of Special Significance (p. 195).	Project paused pending the scope of work to be determined for the Government Work Plan recovery action for a Green Economy Supporting Plan.
Survey the Areas of Biodiversity Importance other than the Foreshore and those Areas associated with a Site of Special Significance and identify any new Areas of Biodiversity Importance (p. 197).	Project initiated. This project is due to be completed by the end of 2021.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Natural Resources cont.	
Monitor the use of Sustainable Urban Drainage Systems on larger developments approved under the IDP – those relating to sites with a Development Framework (p. 201).	No such developments have been approved to date.
Planning Service to liaise with Guernsey Water to review the design of new development to help ensure that development does not further reduce the capacity of the drainage systems to deal with climate change (p. 202).	This action is ongoing and liaison continues to take place.
Development & Planning Authority to liaise with the Committee for the Environment & Infrastructure at an officer and political level to promote the use of renewable energy equipment and infrastructure in accordance with Policy GP9 and IP1 as part of development of the Energy Policy (p. 204).	This action is ongoing and liaison continues to take place.
Construction Waste	
Continued monitoring of the type and scale of developments requiring a Site Waste Management Plan to ensure the threshold is at an appropriate level (p. 212).	Complete to end of 2020 via AMR.
Continue monitoring of the proportion of residential planning applications requiring the submission of a Site Waste Management Plan to ensure the threshold is set at an appropriate level (p. 214).	Complete to end of 2020 via AMR.
Monitoring of post completion submissions and analysis against baseline figures to determine which materials are successfully reused, recycled and minimised and to identify any barriers (p. 215).	This action is ongoing and some information is included in the AMR. Data to inform this is currently collected in a Site Waste Management Plan database.

2018 AMR Action / Monitoring Requirement	2020 AMR Update
Construction Waste cont.	
Continue to monitor the effectiveness of the Site Waste Management Plans Planning Advice Note and continue to seek feedback from stakeholders (p. 215).	This action is ongoing and some information is included in the AMR. Data to inform this is currently collected in a Site Waste Management Plan database.
Provide internal guidance for Development Control Officers to outline the information that is expected to be provided within a Site Waste Management Plan (p. 215).	A Site Waste Management Planning Advice Note was published in June 2018.
Secondary review of the Site Waste Management Plans Planning Advice Note following the completion of internal guidance (p. 215).	No update and not a priority.
Continued regular engagement with the Construction Industry Forum with regards to Site Waste Management Plans in order to monitor their effectiveness in delivering the requirements of the Island Development Plan policies (p. 216).	No update.

States of
Guernsey