

18 November 2020

Connétable M K Jackson
Chairman of Environment, Housing and
Infrastructure Scrutiny Panel
c/o Ms Nikita Hall
Committee and Panel Officer
States Greffe
Morier House
St Helier JE1 1DD

Dear Connétable Jackson

Review of Government Plan 2021 – 2024

Thank you for the opportunity to contribute to your review. I have attached our submission to the Economic and International Affairs Panel and enclosures which sets out the background to our original application for funding for Elizabeth Castle which was made via the Economy and Partnerships Directorate.

Our understanding is that the Elizabeth Castle development project was included in the Government Plan 2020-23 twice, both in revenue and capital.

Capital Funding

	2020 £,000	2021 £,000	2022 £,000	2023 £,000
Elizabeth Castle Development			1,265	2,425

It only came to light where it had been included in revenue when the Government Plan 2021-24 was being developed.

	2021 £,000	2022 £,000	2023 £,000	2024 £,000	Total £,000
CAH Revenue Funding	1,700	2,700	3,700	3,700	12,500
Elizabeth Castle Refurbishment	1,365	2,725	1,360	1,360	6,810
Total CAH Revenue Funding	3,065	5,425	5,060	5,060	18,610

The Council of Ministers agreed to remove the EC line completely and the CAH revenue funding modified to meet the 1% by 2022 as follows:

continued/...

	2020 Estimate (£,000)	2021 Estimate (£,000)	2022 Estimate (£,000)	2023 Estimate (£,000)	2024 Estimate (£,000)	Total Estimate (£,000)
Per GP 2020-2023						
Proposed CAH Growth	700	1,700	2700	3700		8,800
Elizabeth Castle Development		1,365	2,725	1,360		5,450
Total CAH	700	3,065	5,425	5,060		14,250
Proposed GP 2021-2024						
Proposed CAH Growth		1,700	2,500	2,926	2,926	10,052
Total Proposed CAH		1,700	2,500	2,926	2,926	10,052
Revised GP 2021-2024						
Revised CAH Growth		963	3,197	2,966	2,926	10,052
Total Revised CAH		963	3,197	2,966	2,926	10,052

In summary, the Elizabeth Castle development work was included twice in the Government Plan 2020-23 and has been removed altogether in the draft Government Plan 2021-24.

We were not involved in discussions on the implications of change during the development of the Plan. We were advised of the final outcome verbally but have received no formal written confirmation of the reasons for the removal or of alternative plans for funding the work. The Economic and International Affairs Panel explored with the Economic Development, Tourism, Sport and Culture Ministerial team the potential for a bid to the Fiscal Stimulus Fund, proposals for which are before the States Assembly at the time of writing. The original allocations assumed a project spanning a number of years and so our understanding is that Elizabeth Castle would not meet the Fiscal Stimulus criteria of being fully spent by the end of 2021.

We are also advised that Treasury do not regard the project as capital as Government of Jersey would be granting investment funds to Jersey Heritage, because the Business Case was presented via Economy and Partnerships and because Jersey Heritage has been granted by deed of gift the usufruct of both Castles and as such has responsibility for these properties, so although the States retains legal ownership they are not recognised as an asset of the States.

Consequently it is assumed that any funding could be allocated as part of revenue support for Jersey Heritage.

In any case, we remain mindful of the usufruct which states that “In the event of repairs whether urgent or otherwise being required to the Castles or to either of them which will exceed in cost the whole of the Fund the trust may apply to Finance and Economics for additional funding.” We consider it our duty under the usufruct to propose investments to maintain the archaeological and historic integrity of the castles and develop their potential for public value. We cannot determine how best such an application for investment is accounted for by the Government. We would welcome any opportunity to work closely with Government in order to identify appropriate means to funds this very long overdue investment programme.

Yours sincerely



Tim Brown
Chair, Jersey Heritage

29 October 2020

Economic and International
Affairs Scrutiny Panel
c/o Kellie Boydens
Principal Committee and Panel Officer
States Greffe
Morier House
St Helier JE1 1DD

Dear Kellie

Review of Government Plan 2021 – 2024

Thank you for the invitation to comment on the allocation for CAH in the Government Plan.

Jersey Heritage hugely welcomes funding in the Plan to meet the 1% ambition supported by the Assembly in P40/2019. However, we note that on the face of it a huge amount of money has come out of the allocation if the previous and current Plans are compared in the periods in which they overlap. The main loser here seems to be heritage in general but plans for Elizabeth Castle in particular.

We understand the pressure the Plan is under, but the role heritage has and can continue to play in the government's objectives around welfare, particularly for children, and well-being has been demonstrated by the huge increase in local visits to heritage sites. We have seen membership increase to over 15,000. Furthermore over 95% of investment in Jersey Heritage is spent within Jersey and our international reputation attracts leading experts from around the world to come here to work, bringing inbound investment. All this is without mentioning the importance of heritage to the brand of Jersey and the success of tourism and the hospitality sector. A great example would have been the investment in Elizabeth Castle, which would have also created a retreat centre bringing visitors to the Island out of season.

We would submit the following specific points in respect of the Castle project:

- 2023 is the 100th anniversary of the British Government relinquishing Elizabeth Castle to the States of Jersey for operation as a museum and historic site. Save for the years of German Occupation the Castle has played an important role as a visitor attraction as part of the public heritage portfolio and in recent years has become Jersey Heritage's most visited site;
- States' ambitions for the restoration of key heritage assets at Elizabeth Castle, many damaged during the Occupation, have an embarrassingly long history of inaction which long pre-dates the formation of Jersey Heritage;
- In 1980 the Public Works Committee invited AC Saunders, Chief Inspector of Ancient Monuments at the UK Department of the Environment, to make proposals for the future development of Elizabeth Castle, which were presented to the States in **p130/1980** *Elizabeth Castle Development*;

- The proposals included 'the rehabilitation of the Hospital' and that 'the Officers' Quarters be rehabilitated'. The Committee anticipated that the work would be undertaken within seven years and noted that although, in those days of booming tourism, the Castle received 150,000 visitors a year 'the income generated from admissions is to be used to defray the operating costs of the Castle and the surplus utilised to maintain the fabric of the Castle. It would therefore not be possible for the Committee to generate from admissions the whole of the finance needed to undertake the developments proposed'. The States adopted the Proposition 'to approve the general development of Elizabeth Castle on the basis of the proposals contained in the report by the Chief Inspector of Ancient Monuments';
- These priorities were again presented to the States in **P153/1984 Jersey Heritage Trust Development of Museum and Arts Services**, which reported that 'the cost of museum works to the Castles will have to be met from funds provided by the States for the Trust' but noted that notwithstanding the approval of P130 a cautionary approach by the Finance and Economic Committee meant that 'it must be admitted that only a limited amount of work has been possible with the funds allocated. Several major buildings are in a state of dilapidation and one, the Hospital, was itemized by Saunders as being in need of major rehabilitation. Nothing has yet been done, nor funds provided for the undertaking of this important element in the actual development of the Castles';
- In June 1995, the Bailiff informed the States that, following a request from the insular authorities, Her Majesty The Queen had been graciously pleased to agree to abandon the Crown's reversionary ownership of Mont Orgueil and Elizabeth Castles to the public of Jersey by deed of gift. The States duly adopted a proposition of the Policy and Resources Committee **P.93/1995 Transfer of ownership**. The Report stated 'Under the present agreements with the Crown the States has the enjoyment in perpetuity of Mont Orgueil and Elizabeth Castles, subject to certain conditions regarding responsibilities for maintenance, conservation, interpretation ... For many years the States has complied with the conditions of the agreements and has invested resources to restore, maintain and enhance the Castles. The Home Office engineers have been consulted when any development has been proposed but in latter years the Home Office has been content to allow the States to maintain and enhance the Castles with very little direct involvement.' In 1996 the States assembled in extraordinary session in the Middle Ward of Mont Orgueil Castle to receive His Excellency the Lieutenant Governor and to acknowledge formally their acceptance of the most gracious gift by Her Majesty The Queen in conveying by deed of gift to the public of the Island the reversionary ownership of Mont Orgueil Castle and Elizabeth Castle. His Excellency handed to the Bailiff the keys;
- These issues of responsibility were ultimately recognised and reflected in the *Cession of Usufruct* approved by the States in **P175/1996**. The usufruct imposed an obligation on Jersey Heritage Trust to 'restore the Castles, develop public facilities and ensure the preservation of the Castles' and to 'preserve the historical and archaeological integrity of the site'. The usufruct gave the States a duty to 'assess the state and condition of the Castles' and set out that 'in the event of repairs whether urgent or otherwise being required to the Castles or to either of them which shall exceed in cost the whole of the [Ancient Monuments] Fund the Trust may apply to the Finance and Economics Committee for additional funding'.

So, it is against that background that Jersey Heritage Trust announced in 2006, with the successful completion of the refurbishment of Mont Orgueil, ambitions to address the long outstanding plans for Elizabeth Castle highlighted in the reports to the States in the 1980s.

A number of applications as part of States' annual planning were made. None were received favourably although no specific feedback on the reasons for failure were communicated to us. In 2016 Jersey Heritage Trust submitted a comprehensive survey of the condition of the Castle and options to address vulnerabilities. In discussion with the Economic Development Department, the Hospital and Officers' Quarters, as highlighted by Saunders, were identified as priorities in terms of both conservation and opportunity. In 2017, at the invitation of then Assistant Minister with responsibility for Culture, Deputy Murray Norton, we presented plans to States Members which were well received (the text of the presentation is attached) and subsequently funding was identified in the *Government Plan 2020-2024* approved in **P.71/2019**.

On that basis, and with the support of the Department, Jersey Heritage Trust committed effort and resources to develop the plans upstream of implementation including:

- A public engagement plan, *Love Your Castle*, which saw thousands of Islanders visiting the Castle to explore the plans on open days as well as corporate engagement and fundraising including team conservation projects and events like *The Castle Chase*
- Archaeological projects led by University of York Archaeology Department, with volunteers from the Société Jersiaise and Young Archaeologist Club, to inform the detailed conservation challenges of the developments
- Architectural work on the proposals to bring the scheme towards a planning application, currently in submission
- Partnership development to secure business options to operate the attraction, events and accommodation offers to be made possible by the investment

So we were surprised and disappointed, if not embarrassed, when we were alerted to the possibility that the proposals, first identified for progress in 1980, were yet again to be a casualty of changes to the Plan because, we were informed, they had been included in error in both revenue and capital allocations: Elizabeth Castle seems to have gone from being included twice to being excluded altogether.

The position of Jersey Heritage Trust remains that, as the Assembly has accepted on a number of occasions:

- The need for conservation work on these very significant historic buildings, first identified and accepted by the States in 1980, is pressing, ultimately unavoidable and inevitably getting more expensive with the passing of time
- There is a real opportunity here to bring this important heritage site, at the heart of St Helier and of our Island story, but currently culturally and economically redundant for six months of the year, to life year round for attraction, events, accommodation and community use
- Jersey Heritage Trust, operating in respect of its responsibilities under the terms of the usufruct, generates significant funds for the ongoing maintenance of the Castle heritage and its operation as an important visitor attraction in the tourism economy
- Responsibility under the usufruct for the significant investment necessary to meet the objectives of the usufruct to preserve the Castle, falls to the Government in the way recognised over the last four decades.

We understand the challenges facing the Island but the Island's responsibilities towards this significant heritage asset, sought from the Crown, set out in the usufruct and on several occasions over 40 years approved by the States, cannot be avoided by Treasury forever.

To repeat, we understand the pressure on the current Plan. But Government investment in built assets is still very significant in that Plan. Whilst it appears that it has not been possible to fund the Castle in this Plan, our concern remains that consequently, 40 years after the need was recognised by the Assembly, there is no plan or, to put it another way, in effect a plan **never** to invest in this building, the most significant public heritage asset in St Helier and one of the Island's most important visitor attractions, in support of the obligations placed on Jersey Heritage by the Assembly in the usufruct. Our request therefore is at the earliest possible opportunity to identify not if, but when, investment can be identified to allow us to plan accordingly.

The current proposals remain those presented to States Members in 2017 and include:

1. Restoration of the Hospital Block for presentation as part of the heritage attraction during the summer months and for meeting and events rooms during the winter period
2. Restoration of the outbuildings of the Hospital for hospitality facilities in support of expanded events use on the Green
3. Restoration of the Officers' Quarters to support self-catering holiday accommodation during the summer and community residential retreat use in partnership with local charities in the winter period.

The best way to understand both the challenges and huge opportunities from investing in Elizabeth Castle is to visit it and see it at first-hand. I would therefore be delighted for you to visit the Castle and see buildings closed to the public that could form part of a great facility for locals and would attract visitors from across the UK and Europe.

In the meantime, I cannot stress enough the importance that investment in our heritage can be to well-being and recovery of this Island and its people. As they say, 15,000 members can't all be wrong.

If you require more information or would like to discuss this response, please feel free to ask. Indeed, if you want to take up the invite to visit the Castle please contact me.

Yours sincerely



Tim Brown
Chair, Jersey Heritage

Love Your Castle 2017

Earlier this year we launched a public engagement campaign called *Love your Castle*. We invited Islanders to reconnect with this amazing site at the heart of our Island story. And people responded in their thousands. The launch attracted 4,000 Islanders to an open day in April. Corporates have responded through new events like Hawksford Castle Chase. Ogier have supported a new educational programme – Castle School. Staff from Ogier, Nat West and others have got stuck into some practical conservation work at the Castle.

Castle Stories

The castle deserves this support – its buildings hold some of the Islands most important stories. St Helier himself lived and was martyred here in the sixth century - only the hermitage oratory remains of the 12th century Abbey created in his memory. The Governor's House perhaps first occupied by Sir Walter Raleigh, also sheltered Charles II during the Civil War, when lands in America forming New Jersey were given. It was here that Captain Mulcaster refused to surrender the castle to the French before the Battle of Jersey. Here where the Organisation Todt operated a camp during the German Occupation. And here where millions of tourists have enjoyed the castle as a visitor attraction showcasing our much loved living history programme.

Elizabeth Castle Today

Today Elizabeth Castle is the most visited Jersey Heritage site. It will receive well over 50,000 visitors this year, nearly half a million pounds in admissions. The Castle is absolutely core, not only to the Jersey Heritage business, but to the visitor experience of heritage in Jersey. The castle is the strongest defining image of St Helier and our waterfront, an image of great value in promoting the Island and as just one recent illustration of that featured strongly in the recent coverage of the triathlon superleague.

The size of the challenge

There are challenges in managing the future of the Castle, not least its sheer scale. The construction of the castle enclosed a number of small islets. With more than thirty

individual buildings 'the Castle' is best thought of as a small village enclosed by more than a kilometre of sea-wall. Consequently basic maintenance, let alone development, is a major undertaking.

The condition of the castle

There is a great deal of ongoing building conservation work taking place. We never stop repairing the seawalls, maintaining roofs, stabilising the ancient masonry. But many of the buildings at the castle remain closed to the public. The site was badly damaged during the Occupation. While buildings have been kept wind and watertight many were never fully restored and are currently unsafe to visit. I'll come to the financials later, but, in simplest terms, while castle income is sufficient to stand still with conservation work and maintain the operation of the castle, it is not enough to make a dent in this substantial conservation backlog. As was the case with Gorey Castle in 1999, significant investment, beyond the means of Jersey Heritage alone, is necessary if that is to be achieved and if these buildings are to be brought into productive use.

Development solutions

So we have developed proposals to make the most of the fabric, the stories and the experiences available at the castle, giving all these buildings the care they deserve. The proposals cover all the buildings wholly or partially inaccessible or requiring restoration. Taken as a whole, that would be a huge task. There is 13 to 15 million pounds of conservation, restoration and development here. There is extensive documentation of those proposals, which have been submitted to EDTSC and Treasury. Recognising the limits of what may be realistically possible, we have prioritised. We have looked at the individual developments likely to add most value to the castle as a visitor attraction, in the short term.

The Hospital Block a priority

And in our view, the priority is the Hospital Block, the most significant area of currently unused heritage interest. We are working with archaeologists from York University Department of Archaeology to understand the building and how best to restore it. It dates from the early nineteenth century. The current form of the building was complete around 1880, following as many as seven different phases of construction at a time the Castle must

have been a hive of construction activity. The arrangements included married quarters, kitchens, wards for infectious diseases, a mortuary, stables, engineers' stores and a coal yard – it's a substantial collection of buildings, all currently inaccessible to the public.

The Hospital Block Proposal

The presentation shows pictures of the interior of the hospital wards. In this part of the building our proposal combines historic presentation, with opportunities for venue hire and 'out of hours' activity. Following careful restoration of the buildings to their Victorian interiors, we hope to bring the hospital alive using video techniques incorporating elements of living history. This is such an approach used at Kew Palace, for example. It limits impact on the buildings and interiors, so when the interpretation is turned off the rooms can be used for a variety of events. Much like the restored Merchant's House at No9 Pier Road is used for corporate and cultural events, weddings and dinners, for example. Or rather like the National Trusts New Street building.

The Coal Yard Proposal

The proposal for these stores, stables and coal yard is to create new facilities to support events at the castle. This includes a multi-use flexible space, which would work rather like the Oules room at Jersey Museum. And WCs to provide for events, both in that building and events on the Castle Green.

The Green Proposal

The Green is currently the site used for larger, marquee events. The blue line marks the outline of a huge barrack building that once occupied this space. Marquees are not ideal structures in an historic site. They are disruptive to put up and down or if left over a longer period have a negative visual impact. So we looked at the possibility of building a semi-permanent, seasonal pavilion structure. We have come up with a modular structure that could enable a range of events, in different configurations for daytime and out of hours events. Here are some examples of how that might work. The core idea of the development is to provide facilities for a greater range of events and activities at the castle.

The Officers' Quarters

Although the Hospital Block is our priority, the development of self-catering accommodation in the Officer's Block is another early opportunity. The very first Jersey Heritage Let was developed at Elizabeth Castle in the 1980s, a precursor to the incredibly successful scheme with coastal forts and towers.

The Officers' Quarters, currently used for exhibition, if properly restored to period, would be ideal for group accommodation. A valuable addition to the Heritage Lets scheme this could handle large, school-class size groups.

The strategic context

And so that is what we are currently seeking funding for. We strongly believe the project contributes to key States strategic aims for education, tourism and the regeneration of St Helier. We believe that is consistent with the long term States vision Future Jersey being developed by the Policy Unit. A lot can be said about the value of heritage in a community like ours. At its simplest I come back to the response to our campaign; thousands and thousands of Islanders, visiting, volunteering, learning, sharing, delivering across many sections of the vision, Learning, Cultural Vibrancy, Inclusivity, Health and Wellbeing as well as the more obvious heritage drivers in Historic Environment . The Jersey Opinion and Lifestyle Survey last year showed that (and this is quite unlike in the UK) heritage engagement in Jersey is equally inclusive across all communities of origin. In other words wherever Islanders come from, 'heritage' is one of the spaces in Jersey that brings people together.

Tourism context

Looked at from a tourism perspective, I am grateful to Visit Jersey for this slide from a study for Visit Britain on cultural tourism. It is a reminder that the heritage visitor product is a combination of stories, of lived experiences as well as the historic fabric itself. So we have tried to cover all those bases in our scheme in a holistic appeal to people who enjoy heritage in many different ways.

Business Case

And at a more tactical level, investment will bring redundant buildings into productive use and prevent escalation of longer term maintenance costs. But it will cost money. The Hospital Block restoration is around 2.8M – the Officers' Quarters just under 2M. Additional income assumptions are relatively modest, as they were with the conservation of Gorey Castle. By comparison we spent c.£4.5M at Gorey castle - including a 3M States vote in 1999. There has been no comparable investment in Elizabeth Castle in recent history. In part, of course, longer term income levels depend on the success of growth in tourism - in which we hope upgraded heritage attractions will play a part.

Access

Finally, it is often said that access is a constraint on the development of the castle. But it is a fact that more people visit Elizabeth Castle than all our other sites, including Gorey Castle where there is no such apparent access barrier. We were asked to look at a bridge as part of this study. A bridge is obviously possible - but on this windward side of the Island would have to be very substantial, presenting planning, navigation and costs issues unlikely to be overcome in the short term. One issue we can address is night time access. The ferries can't run at night but with a relatively low cost pontoon at the breakwater we could land people via boat from the harbour enabling some development of the evening economy of the castle as part of this package.

So a bridge may become a long term option but at this stage the ferries continue to provide best value for access to Elizabeth Castle. These have of course attracted a great deal of discussion in the past. But to repeat what I said earlier, Elizabeth Castle is the most visited Jersey Heritage site and something like 80% of the 50+k visitors it attracts travel on the ferries which we anticipate being operable for another 8-10 years. And for many of our visitors, especially some of our youngest visitors, they are an essential part of the experience and an attraction in their own right.

Summary

So in summary, we will continue with the *Love Your Castle* campaign, continue to raise interest in the site, to involve Islanders and businesses, continue to develop the tourism

attraction of the site. We will continue to spend the half-million-pounds-a-year we take at the castle on its care. But to make a real difference, to finish the job started by the States after the Occupation, to realise the potential of the castle, to bring more of the castle into public use, we will need help. And with that help the castle will continue to play its part at the heart of the Island's special culture and heritage.

JC