PLANNING FOR HOMES

Presented to the States on 30th March 1999
by the Planning and Environment Committee

STATES OF JERSEY

STATES GREFFE

140 1999 R.C.10

Price code: E

REPORT

Contents

Action plan for the way ahead

A joint meeting of the Policy and Resources, Finance and Economics, Planning and Environment, and Housing Committees was held on 4th February 1999 to consider housing issues and how the future housing needs of Islanders can be met. This led to much consensus and a shared action plan for the way ahead. Through joint and concerted action, the committees believe they can find a way forward to provide homes for Island residents into the next century.

The Committees agreed the following three statements -

1. Most homes can be provided in built-up areas.

   There is firm evidence that a very large number of the required units can be provided within existing built-up areas, including homes for families. Landowners and developers have been encouraged to consider the development of urban sites for need-housing, and the initiatives launched through the Housing Forum held last year are now bringing forward development proposals.

   The true potential of the built-up area will not be realised without States and parish involvement, and partnership with developers.

2. It may be necessary to develop suitable land on the edge of built-up areas.

   The constraints which exist on urban sites, and the potential for delay, require the parallel investigation of potential housing sites on the edge of built-up areas. The information published so far provides sufficient justification for this investigation, which may lead to the re-zoning of some land on the edge of built-up areas.

3. New developments in the countryside will be restricted.

Any suggestions that green-field sites are re-zoned will be resisted until a more sophisticated analysis of the future housing situation is available.

The Committees also agreed -

1. To re-launch the Urban Site Initiative with a broader vision - the rejuvenation of the urban area, particularly St. Helier.

2. The Housing Committee will press ahead with its timetable to bring a revised housing strategy to the States as soon as possible.

3. The Planning and Environment Committee to undertake an investigation of sites on the edge of the built-up area in parallel with progressing the urban sites.

4. The Trade and Industry Sub-Committee to consult with the Construction Industry to ascertain its ability to achieve the Island's proposed building programme.

5. To undertake of an independent study to provide an updated and more accurate forecast of future housing need.

6. The Policy and Resources Committee, assisted by its newly formed Department, to give top priority to monitoring and implementing the States' Population Policy, including progressing the introduction of Identity/Smart Cards in the Island, which will provide more accurate information on the resident population and the future housing needs of Islanders.

7. The Chief Officers of the four Committees to draw up proposals as quickly as possible for the creation of a dedicated Strategic Task Force, which would be empowered, resourced and organised to achieve these objectives in the timescale required.

Summary of findings

The preparation of this report was agreed, as part of a package of measures, at a joint meeting of the Policy and Resources, Finance and Economics, Planning and Environment and Housing Committees on 12th November 1998.

Since the publication of the previous Residential Land Availability Review in June 1998, a major new development has been completed at the former OTC site. Furthermore, a number of new housing sites have come forward, as part of the 'Urban Site Initiative', including La Coie Hotel and land which is surplus to the Education Committee's requirements at Highlands College and Jersey College for Girls. Together the sites make a significant addition to the development programme for social housing.

Notwithstanding the above, on the basis of the methodology currently employed to assess social housing requirements, which relies primarily on historic trends and identified existing needs, there remains a considerable, albeit reduced requirement for additional homes during the next five years.

This report reveals an estimated overall requirement for sites for some 975 additional homes throughout the period up to the end of 2003, over and above sites already earmarked and/or likely to yield during the period, as summarised in Table A below. These estimated additional requirements comprise, in round numbers, approximately 625 social rented and 350 first-time buyer dwellings.

Table A: Social housing requirements to the end of 2003

Housing requirements and supply	Social rented dwellings	First-time buyer dwellings	Total
Estimated units required	1,140[1]	800[2]	1,940
Less planned new build completions (net)	(519)[3]	(155)[4]	(674)
Less a proportion of private (a) - (j) developments which have or might reasonably be expected to contribute to meeting identified requirements between 1998 and the end of 2003.		(289)[5]	(289)
Estimated shortfall requiring remedial action	**621**	**356**	**977**

The estimated shortfall in the provision of social rented and first-time buyer housing covers a period of five years and does not need to be provided all at the same time, as demonstrated by the annual target figures in Table B. This shows ideal annual target figures which are spread evenly between 2000 and 2003. The requirements for additional social rented homes increase towards the end of the period, whilst the reverse is true for first-time buyer requirements.

Notwithstanding the above, it is important to recognise that the majority of additional sites required to meet the projected housing requirements will need to be secured during 1999 and the remainder in 2000, if we are to assume an average lead-in time of three years before dwellings can be completed on the sites in question.

Table B: Housing targets for additional social housing provision, 1999 - 2003

Housing type	**Annual target for additional housing requirement by year (rounded)[6]**					**Total**
	1999	**2000**	**2001**	**2002**	**2003**	
Social rented	-	100	150	175	200	**625**
First-time buyer	-	150	100	50	50	**350**
Total	**-**	**250**	**250**	**225**	**250**	**975**

The strategy which has been developed to address the projected shortfall in social housing provision has become known as the '*Urban Site Initiative*'. This seeks to maximise the opportunities for bringing forward suitable sites in the urban/built-up area, in accordance with States' strategic policy objectives. It has also received the broad support of a special *Housing Forum*, which was convened during the first half of 1998 and brought together all the parties involved in the provision of housing in the Island.

The task of identifying possible urban housing sites and determining their potential yields is on-going and has been passed on to a specially formed '*Site Action Group*', comprising officers from the Housing, Treasury and Planning and Property Services departments. It is clear from the work so far that sites in the built-up area can make a considerable contribution to meeting the projected additional requirements for homes over the next five years, provided the necessary financial and organisational mechanisms are put in place to enable their timely release and to offset commercial land values.

To date, the Site Action Group has identified 21 sites which it considers to be suitable for social rented housing, with a potential yield of some 300+ dwelling units, based on initial 'design-led' feasibility studies and/or planning applications. Two of these sites (i.e. Mont St. Clair Hotel and Aquila Youth Centre) will be negotiated for purchase by the end of February 1999, with a potential yield of 44 homes, and others are likely to be delivered for development in the next few months. In addition, the group has identified a number of private development sites, which could yield an estimated 400+ first-time buyer dwellings, provided there is appropriate intervention by the States to make available the necessary development subsidies. On the basis that all the identified sites can be secured, their potential overall contribution towards meeting outstanding social housing requirements is indicated in Table C.

Table C: The potential impact of identified urban housing sites on the projected social housing shortfall, up to the end of 2003 (assuming they are all secured)

Dwellings by type and tenure	**Projected shortfall of dwellings (up to end 2003)[7]**	**Estimated dwelling yield from urban sites identified by the 'Site Action Group'[8]**	**Net outstanding dwelling requirement (up to end 2003)**
Social rented			
one-bedroom	268	122	146
two-bedroom	83	83	-
three-bedroom	270	95	175
All social rented	**621**	**300**	**321**
First-time buyers			
one-bedroom	65	117	(52)
two-bedroom	118	272	(154)
three-bedroom	173	20	153
All first-time buyers	**356**	**409**	**(53)**

The figures in Table C suggest that if all the sites identified as suitable for social rented dwellings are developed, there would still be a shortfall of some 300 such dwellings for the period up to the end of 2003. Table C also reveals a mismatch betweer the type of homes required for first-time buyers and the type of housing yield actually suggested by the 'Site Action Group' from identified urban sites. This points to a potential over-provision of one and two-bedroom first-time buyer dwellings and an under-provision of three-bedroom dwellings.

It should be possible to alter the mix of the yield from the identified urban sites to more nearly reflect actual first-time buyer dwelling requirements, and it may even be possible to transfer some of these sites to meet the identified shortfall of one-bedroom social rented dwellings. However, the ability to do this will be restricted by the nature of the sites and the need to -

- comply with design and townscape requirements;
- achieve appropriate levels of amenity for family accommodation; and
- achieve reasonably cost-effective developments, which represent good value for money.

The corporate, consensual approach embodied in the ‘Urban Site Initiative’ and the extensive efforts already in progress towards realising urban housing sites, has the potential to assist enormously in tackling the Island’s more immediate housing problems. However, whilst it is recognised that the ‘Urban Site Initiative’ is a continuing process and that other sites are likely to materialise in due course, it must also be borne in mind that -

- there are constraints affecting many of the identified sites in the urban area (e.g. covenants, loss of tourism bed spaces, differences over evaluation);
- there may be difficulties in negotiating the release of some of the sites in the timeframe required;
- no agreement has yet been reached on the financial and organisational mechanisms which will be essential to achieve the required low cost-homes.

The effect of the above factors on the identified built-up area sites is potentially significant, and the estimated shortfall in dwelling requirements outlined in Table C may therefore be significantly understated. Table D sets out an alternative estimate of outstanding social housing requirements up to the end of 2003, based on the following assumptions -

(i) that the likely yield from sites identified as suitable for social rented purposes, will only include that from sites where their release in the required time-frame are currently regarded as ‘definite’ or ‘probable’;

(ii) that the sites identified as suitable for first-time buyer purposes will be left to private developers, without States’ intervention. In such circumstances, the contribution of private schemes to the first-time buyer requirement is unlikely to exceed 30 per cent.

Table D: An alternative scenario of the potential impact of identified urban housing sites on the projected social housing shortfall, up to the end of 2003

Dwellings by type and tenure	Projected shortfall of dwellings (up to end 2003)[9]	Estimated dwelling yield from identified urban sites[10]	Net outstanding dwelling requirement (up to end 2003)
Social rented			
one-bedroom	268	87	154
two-bedroom	83	110	-
three-bedroom	270	31	239
All social rented	**621**	**228**	**393**
First-time buyers			
one-bedroom	65	35	30
two-bedroom	118	82	36
three-bedroom	173	6	167
All first-time buyers	**356**	**123**	**233**

The alternative scenario set out in Table D points to a net outstanding requirement for some 400 social rented homes rather than the 300 referred to earlier, of which about 60 per cent are three-bedroom dwellings. Table D also suggests that there would be an outstanding requirement for approximately 230 first-time buyer homes, of which some 72 per cent are three-bedroom dwellings.

In the circumstances, in addition to identifying land which has already been developed in the built-up area, there is a need to investigate potential sites on the edge of the built-up area. The broad options in this respect are outlined in this report and include ‘*urban extension*’ and ‘*village extension*’.

Finally, on a more general note, it is important to recognise that the Island’s present housing situation, as described in this report, clearly demonstrates *a continuing need to regularly monitor and review housing demand and supply* and the various factors which impact upon them. Only by so doing will it be possible to respond more effectively to changing economic and social circumstances, in order to help ensure that an adequate supply of land is available at all times. It is currently intended that the next review will take place in the final quarter of the year, when it will benefit from the findings of a more detailed and scientific analysis of future housing requirements. A suitably qualified independent agency will shortly be commissioned to undertake the analysis, and this should serve to remove any lingering doubts about the accuracy of future housing projections.

Terms of reference and context

Introduction

The provision of housing to meet the community's needs continues to be one of the most important issues facing the Island. This is why, since 1993, the Department of Planning and Building Services has undertaken a regular series of 'Residential Land Availability Reviews' (RLARs), in consultation with the Housing Department and the former Chief Adviser's Office.

The primary purposes of each review are to -

(i) establish the facts about the amount of available land for construction of housing over the next five years and beyond; and

(ii) help to ensure an adequate supply of suitable housing land is genuinely available in practical terms at all times to satisfy the Island's projected requirements.

Added impetus for this particular review stems directly from a special joint meeting of the Policy and Resources, Finance and Economics, Planning and Environment and Housing Committees held on Thursday 12th November 1998. The Committees met on that occasion to discuss the way forward in achieving the former Housing Committee's principal aims, as set out in its report and proposition entitled 'Housing Strategy, 1998-2003' (P.201/98). This was due to be debated by the States in February 1999, but is now postponed following the election of a new Housing Committee in December 1998. In the event, the four Committees agreed a package of measures, including the completion of this review, which were principally aimed at ensuring that any future housing strategy debate is fully informed. In particular it was recognised that States members should have further information with regard to the former Housing Committee's propositions on rezoning of land and on the role of the Housing Trusts.

The four Committees have also previously agreed that they should formally approve the text of this and all subsequent RLARs, in the interests of achieving a corporate, consensual approach to the issue of tackling housing needs.

By keeping the housing situation under close scrutiny through regular, corporate reviews, it is hoped that agreements can be reached quickly and that, where necessary, a timely and appropriate response can be made to any previously unforeseen changes in circumstances.

Background

The earlier reviews carried out between April 1993 and March 1996 concluded that the existing housing stock and sites already identified for housing were probably sufficient to meet the Island's requirements without the need to designate additional land for housing purposes. However, the findings of the October 1997 review were quite different from those which preceded it. It highlighted significant reductions in the supply of new social housing and an increase in demand for new housing in virtually all sectors of the market, including social rented and first-time buyer housing. It also warned that the demand was set to increase further, in response to greater affluence and demographic factors, at a time when the supply of new housing had reduced. The October 1997 review concluded that -

> *"the relative equilibrium between the supply of land and the demand for social need and first-time buyer housing had disappeared".*

These findings were echoed in the Review of June 1998, which established an additional site requirement for 900 social rented dwellings and 150 first-time buyer dwellings, over and above sites already identified for the purpose, in order to accommodate projected needs up to the end of 2003. This review recognised that, without remedial action, the gap between supply and demand for these forms of social housing would increase considerably to unacceptable levels during the next five or six years.

The Planning and Environment Committee consequently agreed to concentrate in the first instance on identifying and securing the release of sites to meet the more immediate needs up to 2001, leaving the identified shortfall for the years 2002 and 2003 to be reassessed in the next RLAR. However, the Planning and Environment Committee has accepted for some time that the search for sites should be extended beyond 2001 to cover the whole period up to 2003. This is considered particularly important in view of the time which has elapsed since June 1998, and the reduced time available for effective remedial action in bringing sites forward for development.

The Planning and Environment Committee and the former Housing Committee met on several occasions following the

October 1997 review, to discuss how best to respond to the projected shortfall in the future availability of housing. The two Committees eventually agreed a joint initiative to establish the ‘Housing Forum’. This was principally aimed at bringing together all the relevant parties involved in the provision of housing in the Island, in order to explore the opportunities that exist for unlocking the development potential of urban sites. The findings of the ‘Housing Forum’ to-date, are referred to later in this report, together with the consensus building activities which have subsequently taken place at a political level.

The publication of this joint report marks the start of a fresh corporate, consensual approach to the key housing issues facing the Island, including the assessment of housing requirements, the availability of housing land and the strategy which should be employed to meet any shortfall in provision.

Strategic policy context

The key current strategic objectives of the States, which are most relevant to housing development, are set out in ‘2000 and Beyond - Strategic Policy Review’, 1995. These objectives include the following -

(i) *“to ensure that all individuals living in the Island are adequately housed, with priority given to those with residential qualifications”;*

(ii) *“to preserve open land while recognising and responding to the need to provide for the Island’s economic and social policy objectives”;*

(iii) *“to discourage development in the rural environment”.*

‘2000 and Beyond’ also recognises the need to continue to modernise and improve the existing housing stock and, in addition, specifically requests the Planning and Environment Committee to -

> *“reflect in its planning decisions the need to concentrate residential (and commercial) developments, as far as possible, within the existing urban area”.*

The strategic policy objectives agreed by the States in 1995 have not been materially changed by the Strategic Policy and Action Plans for 1996 and 1997, or the Strategic Policy Review, 1998.

Current housing policy

The Island’s strategic housing policies provide a further context for each Residential Land Availability Review. The current policies of the Housing Committee are set out in its strategic report entitled “*Housing: Strategy for the 90s*”, which was approved by the States in November 1991. A brief account of this policy and its objectives is included in the previous review of June 1998.

A more recent policy document, entitled “*Housing Strategy Report, 1998-2003*”, which was prepared by the former Housing Committee following a comprehensive examination of the Island’s housing situation, is now under review. Some of the issues likely to tackled by the strategy could have significant implications for housing land availability.

Housing policy in practice

Notwithstanding the policy aims and objectives referred to above, it is important for the purposes of this review to have an overall understanding of how the Island’s housing policies have operated in practice, both within the context of the Housing Law and Regulations (which are presently under review) and more generally. A full account of housing policy in practice is set out in the previous review of June 1998, which covers the Housing Committee’s legal responsibilities, the purpose and implications of the Housing Regulations, the high degree of government control over the entire housing market and the priority given to local residents through rationing access to the housing market and the provision of housing subsidies.

Regulation of Undertakings and Development Law

In addition to the controls referred to above, there is one other way in which the States exercises controls over the free-market provision of housing. This involves the Regulation of Undertakings and Development Law, which is administered by the Finance and Economics Committee and which is concerned in part with ensuring that the activities of the development sector are controlled to take the pressure off the Island’s limited resources. The Law is used to channel development towards meeting the Island’s needs. To this end, the Finance and Economics Committee has recently indicated that, in considering applications in the best interests of the Island, it has in mind that the top priority be given to low-cost housing for those with residential qualifications in greatest need of accommodation.

Redefining housing need and demand

Before going on to examine the extent of housing requirements and the supply of land available, it is considered particularly important to re-examine and clearly define what is meant by '*housing need*', as opposed to '*housing demand*', particularly as the States has traditionally concerned itself with trying to satisfy 'housing need' and has left it for the market to accommodate demand, within the constraints imposed by planning and other States policies.

For the purposes of the Island Plan, housing built to meet need was defined as '*Category A*', and this has become synonymous with the construction of rental accommodation by the States, parish authorities, or housing trusts, and also States basic loan first-time buyer housing. '*Category B*', or 'demand housing', was distinguished as privately-owned family homes owned or rented in the private sector.

It is quite clear now that the housing market is a much more fluid entity than when the current Island Plan was produced and the distinctions were drawn between 'need' and 'demand' housing. These distinctions are no longer appropriate, particularly now that -

(i) the States loan scheme applies to first-time buyers, whatever the price or nature of the property acquired;

(ii) the private sector is more easily able to cater for low-income group requirements for rental accommodation, through the private sector rent rebate scheme.

It is now widely accepted that 'need' housing is best described as 'social rented housing' (including housing provided by the Housing Committee, housing trusts and parish authorities) and that first-time buyer housing is more akin to 'demand' housing. There have been a number of attempts to specifically redefine 'housing need' and 'housing demand' in recent years, culminating in the most recent definitions as follows[11] -

(i) Housing need
rental accommodation, provided for persons in need of assistance to obtain satisfactory accommodation, at rental levels which do not exceed the highest rental charged for rental accommodation of the equivalent size and standard let to such persons by the Housing Committee;

(ii) Housing demand
all other remaining dwelling requirements.

These new definitions are taken into account in assessing future housing requirements. However, whilst ensuring adequate provision of social rented housing (i.e. to meet housing need) must remain the priority of the States in the foreseeable future, this does not mean that requirements in other sectors of the housing market should be ignored.

The lack of suitable accommodation for first-time buyers, in terms of availability and affordability, means that the States should continue to actively involve itself in this element of housing demand, in addition to the private sector. Particularly in view of the States' objective to promote home ownership and the general lack of availability of properties for sale throughout the whole housing market, which in turn leads to a lack of mobility and prevents the existing housing stock from providing sufficient first-time buyer accommodation.

Similarly, the States should also have regard to the situation in other areas of the demand sector, including lodging accommodation for non-qualified people, which has recently come under more pressure, as the economy has strengthened and job increases have led to an influx of immigrants.

Overall housing requirements

Demographic change and housing projections

As was the case for the previous review, there is currently no comprehensive assessment of the Island's future housing requirements to act as a base for the purposes of this study. It is recognised that there is an outstanding need for a clear, unequivocal and accurate assessment of likely future housing needs and demands for all sectors of the market. This, in turn, will necessitate the employment of a detailed, scientific and robust methodology for determining housing requirements, especially for the medium and longer term forecasts. A methodology which can stand up to close scrutiny.

To this end, an officer working group has been established under the chairmanship of the Chief Executive to the Policy and Resources Committee, in order to identify a suitable agency to undertake the required exercise and to ensure that the work is carried out effectively. It is presently envisaged that this exercise will be complete by the end of October 1999.

In order to determine the number of new dwelling units of various types that are likely to be needed in future years, it is anticipated that the study will make assumptions about demographic factors such as future populations levels, immigration, marital status (having regard to the likely extent of future marriage breakdown) and the future numbers and types of households resident in the Island. However, it will also be necessary to take account of a wide range of other factors, including -

- immigration and job growth policy;
- the housing policies which operate on the Island;
- the likely progress made by the Health and Social Services Committee in enabling sick, elderly and disabled people to continue to live in their homes for longer;
- the different housing markets which exist in both the social need and demand sectors;
- the outstanding shortfall in dwelling supply at the base date;
- the number of estimated future entrants to the housing market over the period in question (having regard to factors such as affordability of accommodation and social trends);
- the number of existing dwellings which are likely to require replacement over the period;
- the effect of the introduction of the '20 year continuous residency rule' from 2000 onwards and any future variations to this rule (e.g. the possible reduction of the rule to 15 years as proposed by the former Housing Committee in its recent strategy report);
- an appropriate vacancy rate to allow for mobility;
- the effect of likely future economic conditions and social trends in the Island on market requirements;
- the effect of policies and measures put in place to achieve restrictions in population and job growth;
- the number and type of dwellings which are likely to arise from conversions and other private 'windfall' developments;
- the contribution made by the units occupied by the households which will move into newly created units.

It is expected that the above-mentioned exercise will produce a range of housing requirement projections (e.g. high, medium and low), to allow for a variety of possible economic forecasts.

Notwithstanding the above, in 1997 the former Office of the Chief Adviser did prepare some alternative household projections for the periods up to 2006 and 2011, as set out in Figure 1. These are based on the alternative assumptions of nil net migration, a net annual immigration of 200 persons and a net annual immigration of 500 persons, respectively.[12]

Figure 1: Alternative household projections, 2006 and 2011

	Projected new households	
Assumption alternative	**2006**	**2011**
Nil net migration	769	1,525
Net immigration 200 per annum	1,573	2,950
Net immigration 500 per annum	3,100	5,050

Source: former Office of the Chief Adviser

Medium term projections to 2006 show an increase in the number of households ranging from a very modest 770 to 3,100 over and above the 1996 census figure, based on the best and worst case scenarios *(i.e. 77 to 310 p.a.).* This range is more exaggerated in the longer term projections up to 2011, which show increases of 1,525 to 5,050 households respectively.

Whilst it can reasonably be assumed that each household formation represents an expression of demand/need for a new dwelling, household formation is only part of the equation for determining the overall housing requirement. The figures would be significantly higher when one takes into account all the other factors previously outlined. Nevertheless, they are very useful in emphasising the potential enormity of the housing demand which might face the Island in the next ten to 15 years, depending on -

(i) the effectiveness of measures which are employed to implement the States strategy in relation to population and immigration control;

(ii) the nature of any future States housing strategy for the period in question;

(iii) the future rate of new household formation and the average size of households.

It was assumed that the household projections based on 'Nil Net Migration' would represent the most likely scenario, when in October 1997, the States -

(i) reconfirmed its long term policy objective that "*the resident population should be the same as, or less than, the level in September 1995*"; and

(ii) agreed a package of measures aimed at reducing the demand for labour.

However, recent manpower returns for the period between December 1996 and December 1997 point to an upward trend in immigration and suggest that the population might already have increased by 3000+ persons since the 1996 Census (excluding natural growth).[13] The end of year manpower figures for 1998 will be the first to demonstrate whether the changes made to the Regulations and Undertaking Law on 1st June 1998 are proving effective in restricting job growth and reducing net immigration. However, the latest quarterly manpower returns for 30th June 1998 do provide some grounds for cautious optimism that the new measures are starting to ease pressure on the labour market. They provide evidence of a levelling-off in the growth of persons engaged on a full-time basis in key sectors of the labour market, including construction, banking and finance and legal and accountancy activities.

There is uncertainty about what decisions the States will take in response to the recent growth in immigration, given the potential implications for its long-term population policy objectives. However, in any event, the recent increase in population arising from net immigration will clearly have an effect on the projected housing requirements set out above. The extent of this effect will depend on the proportion of those immigrants who have residential qualifications, or who marry those with qualifications, and it can be expected to increase towards the end of the period up to the end of 2003. The Chief Executive of the Policy and Resources Committee has advised that the previous projections based on 'nil net migration' should be considered a minimum requirement.

Current approach to determining social housing requirements

In the absence of the more sophisticated analysis of social housing requirements, which is shortly to be undertaken by a suitably qualified independent agency, this review continues to rely on more simplistic methods of assessment. The short-term projections of social rented and first-time buyer housing requirements included in the next few pages, are primarily based on identified established needs and historical trends. However, it is considered that the methods employed offer a reasonably accurate indication of the requirements up to the end of 2003, and the findings are generally not in dispute by the relevant States departments.

Whilst the findings of the planned housing requirements study should serve to remove any doubts about the accuracy of future housing projections, they are likely to be more material for the medium and longer term (i.e. up to 2006 and 2011 respectively). The more immediate housing requirements covered by this review should only marginally be affected by changing population assumptions, given that they are largely based on need within the existing population.

In his recent paper entitled 'Population Assumptions for the Purposes of Forecasting Household Formation and New Dwelling Requirements', the Chief Executive to the Policy and Resources Committee defends the current projections included in this review, suggests that they be regarded as minimum requirements, and questions the practical relevance of disputing the figures, as follows -

> *"……….The housing requirements for the period up to 2003 included in the residential land availability exercise however are based on nil net migration. Accordingly they should be considered a minimum requirement. Furthermore, because it is entirely reasonable to expect further additions to the waiting list for social need housing in the future from year to year, and for the demand for first-time buyer properties to be added to from year to year,*

it can be concluded that any questioning of the current estimated housing requirements up to 2003 can be considered somewhat academic. If the "need" for housing for the period up to 2003 should prove to be less than forecast in the residential land availability exercise the result would be that the dwellings to be constructed, in response to what is presently forecast, would cover "need" for a slightly longer period (i.e. up to 2004 or 2005)."

Indicators of housing demand

There are a number of clear signs that housing demand pressures in the Island have risen to an acute level. The main indicators of this increased demand, which has been aggravated by the failure to supply sufficient houses in the last two or three years, include -

(i) house prices;

(ii) the States Rental Waiting List;

(iii) the Housing Department survey of first-time buyers;

(iv) the requirements of those without housing qualifications;

(v) the Housing Registration Scheme for non-qualified people;

(vi) homelessness.

House prices

House prices in the private sector are important indicators of supply and demand pressures in the housing market. There is strong evidence that house prices have risen sharply since the end of 1996, although in August 1998, the President of the Jersey Estate Agents Association said that the increases had stabilised for the time being. This may well reflect an unwillingness on the part of prospective house buyers to pay inflated prices, particularly when the future economic climate is less certain than it has been of late. However, it is likely that the rise in prices will eventually resume in the absence of any effective remedial action to increase the supply of housing.

The 'Jersey House Price Index' for 1996 and 1997 serves to demonstrate the recent upward trend in house prices (see Figure 2). The index is compiled annually by the Office of the Chief Adviser, based on the average net retail prices of a standard collection of dwellings. The figures show that the continuous price rises throughout the 1980s decelerated during the first half of the 90s to a static position in 1995. However, average house prices rose again by 5.7 per cent between 1995 and 1996. Indeed, discussions with representatives of the Island's estate agents, property valuers and surveyors at the time when the 1996 index was compiled, suggested that the average price rise during 1996 hid a sharp rise in the last quarter of that year, which was probably closer to ten per cent.

Figure 2: Jersey House Price Index, 1985 to 1997

Year	**Jersey Index**	
	Index	**Movement (%)**
1985	100	
1986	107	7.0
1987	121	13.1
1988	142	17.4
1989	174	22.5
1990	207	19.0
1991	224	8.2
1992	240	7.1
1993	238	(1.0)
1994	244	2.5
1995	244	0
1996	258	5.7
1997	299	15.7

Source: former Office of the Chief Adviser

It is clear now that the rise in house prices continued to accelerate during 1997. The official figures suggest a rise of 15.7 per cent between 1996 and the end of 1997. However, the Jersey Estate Agent's Association are of the opinion that house prices in the bracket used to compile the index rose by as much as 30 per cent during 1997. The association has also confirmed that house prices in this bracket continued to rise in 1998 by approximately ten per cent, despite the levelling-off of prices in the second part of the year.

The rising property prices of recent years compare with those experienced in the late 1980s, for similar reasons. Namely, an increase in demand in a thriving economy at the same time as a reduction has occurred in new dwelling construction.

The marked increase in house prices reflects the current limitations in the availability of housing in the Island and a strong increase in demand for residential property. The increase in demand may in turn be driven by a combination of factors, including -

- rising affluence (being a function of rising real income);
- a renewal of confidence in job security;
- the increased number of job opportunities which has resulted in increased net immigration and an increase in the price of lodging accommodation;
- changing personal aspirations;
- the availability of cheap, or soft finance from mortgage lenders;
- increased expectations of higher capital growth in the value of housing;
- States' policies which set out to promote owner occupation, through a network of direct and indirect subsidies (including mortgage interest tax relief);
- the rise in the number of matrimonial breakdowns.

States Rental Waiting List

The States Rental Waiting List is a good indicator of relative pressure on the housing market generally and more specifically, of demand by residentially qualified persons. This waiting list comprises residentially qualified pensioners and families with dependent children who cannot afford to rent or purchase accommodation in the private sector. The past and projected year end statistics between 1986 and 2003 are set out in Figure 3.

Figure 3: States Rental Waiting List (at year end), 1986 to 1997 and forecasts to 2003 (assuming no remedial action is taken to make available additional sites)

Source: Housing Department records

The figures show a substantial decrease in waiting list levels from the peak registration of 900 families and individuals at the end of 1989 to a low of only 268 families and individuals in 1996. The improvement during this period coincided with an extensive rental and first-time buyer building programme in addition to other factors, such as the introduction of the 'Private Sector Rent Rebate Scheme', which enabled many households to remain in private sector rented accommodation.

However, since the end of 1996 there has been a significant change in the situation. In 1997, for the first time since 1989, there has been a rise in waiting list numbers. At the end of 1997 there were some 352 households on the waiting list, which represents a 31 per cent increase during that year. This upward trend continued throughout 1998 and the States Rental Waiting List has increased to 373. Current registrations therefore, are now moving towards 1993 levels, and are projected to rise to 821 by the end of 2003, if no remedial action is taken.

Of the 373 families and individuals on the waiting list at the end of 1998, approximately 290 were considered to be in urgent need of re-housing for a variety of reasons, including ill-health, sub-standard accommodation and overcrowding (i.e. groups 1 and 2). This figure is the same as that for 1992 and represents a 33 per cent increase over the figure for the end of 1997 and a 111 per cent increase since the end of 1996. In addition to those on the waiting list, there are also between 15 and 20 families/individuals in temporary hostel accommodation awaiting re-housing.

It is predicted that if no effective remedial action is taken to enhance the supply of social rented housing units and also first-time buyer dwellings,[14] waiting list numbers will increase significantly throughout the next five years and beyond, because -

(i) there is only a limited supply of new social rented housing units which are programmed to become available within the timeframe;

(ii) there have been delays in bringing forward key sites in States ownership (e.g. Belle Vue Pleasure Park and St. Helier Waterfront);

(iii) there will be a continuing emphasis on redeveloping and refurbishing older outworn housing estates in States' ownership, which will involve a further loss of some 164 dwelling units as densities are reduced (e.g. Elysee Estate, Parade Square Flats and Le Geyt Flats);[15]

(iv) the likely registration of previously unqualified persons who are due to gain full residential rights from the year 2000, under the '20 year continuous residency rule'.[16]

It is extremely difficult, given the many variables involved, to accurately forecast what the requirements will be for social rented housing during the next five years. However, Figure 4 represents an attempt to do this, based on the assumptions that -

(i) the average annual rate of accepted applications will be of the order of 300 in 1999 (based on the average acceptance rate of applications over the last four years) and thereafter will rise further to take account of people obtaining qualifications under the '20 year continuous residency rule';

(ii) expected opportunities to re-house people in the existing housing stock will be in line with previous annual average rates.

Figure 4: Social rented housing requirements, 1999 to 2003

Social rented housing requirements	**Dwellings**
Housing Rental Waiting List (at end 1998)	373
Anticipated new applications - 1999 2000 2001 2002 2003	300 350 350 370 400
Sub-total	2,143
Less applicants housed through existing stock *- start 1999 to end 2003 (at 150 per annum)*	(750)
Sub-total	1393
Less temporarily unoccupied properties awaiting refurbishment (currently at Grasett Park and Le Geyt), which will arise on a continuous basis throughout the period up to 2003, as part of a rolling programme for the refurbishment of outworn estates	(20) (33)
Sub-total	1,340
Less acceptable waiting list number	(200)
TOTAL ESTIMATED SOCIAL RENTED HOUSING REQUIREMENTS	**1,140**

Source: Housing Department

The figures suggest that there is an estimated overall requirement to provide additional social rented housing stock for some 1,140 households between the end of 1998 and the end of 2003. This assumes that a waiting list of 200 households at any one time is reasonable.[17]

The evidence from both the current 'Waiting List Breakdown' and the current 'Tenant Transfer List' (see Appendix 1), suggests that the largest demand currently in the social rented sector is for small accommodation, although it does indicate that over 30 per cent of the requirement is for larger family homes. However, these figures represent a snapshot in time, and are not sufficient in themselves to provide a true indication of the type of dwelling units required over the period up to the end of 2003.

It could be argued that the requirement for larger family dwellings will continue to rise over the next five years, having regard to -

- the nature of the present housing stock (e.g. 40 per cent is one-bedroom accommodation);
- the continued shrinkage in the larger family housing stock as a result of the redevelopment programme for outworn estates;
- the expected increase in the proportion of larger family units on the rental waiting list, reflecting rising birth rates;
- the scarcity of larger family accommodation in the private rental sector;
- the number and nature of families who will begin to qualify under the '20 years' continuous residency rule' from 2000, many of whom already have one child and may still wish to increase the size of their families when they obtain regulated accommodation.

In its report entitled 'Housing Strategy Report, 1998-2003', the former Housing Committee suggested that the main short-term problem over the next five years will stem from the demand that is likely to come from families with children and the shortage of the larger sized family accommodation. This report predicted that the waiting times for a two-bedroom and three-bedroom property for those in greatest need was likely to rise to 14 months and two years respectively by the start of 1999.

The former Housing Committee also indicated in its strategy report that outstanding social rented accommodation requirements over the next five years should be divided approximately as follows -

- 30 per cent three-bedroom houses;

- 35 per cent two-bedroom dwellings;
- 35 per cent one-bedroom flats.

First-time buyers

It is clear from the evidence available that there remains a sizeable latent demand for first-time buyer accommodation which is not being met. This demand has built-up in the last two years due in large part to the fall in the completion of purpose-built first-time buyers' accommodation and the general lack of affordable housing on the market. In addition to adversely affecting the States' long-standing objective of encouraging home ownership and the ambitions of prospective home owners, it is also important to recognise that the inability to purchase places more pressure on the private rental sector, which in turn leads to a growth in the States Rental Waiting List. The present dearth of affordable first-time buyer accommodation is reflected in the local housing market. Although demand in other areas of the housing market is strong at all prices up to £500,000, the most sought-after market at the present time is for properties in the £200,000 to £275,000 price range. This encompasses first-time buyers, as well as those seeking to upgrade from flat to house ownership. Clearly, the situation could worsen if nothing is done to make provision for this type of housing.

In 1997, the Housing Committee undertook a survey, in order to establish the number of potential first-time buyers in the Island. Invitations to register an interest were extended to all suitably qualified persons who had never before owned a property, but who wished to buy. This involved the completion of a survey form, which also requested details of family income and savings. The Housing Department received 306 completed survey forms. Of the respondees, 77 (25 per cent) were single people, 107 (35 per cent) were childless couples and 122 (40 per cent) were couples or single people with children. It is considered that this survey still provides a reasonably good indication of the level and nature of the current demand for first-time buyer accommodation, given that very few such dwelling units have been constructed in the interim.[18] Consideration is currently being given by the Housing Department to the re-introduction of a 'first-time buyer register', which should provide more accurate and up-to-date information.

Clearly, it is difficult to accurately predict the number of new entrants to the housing market who would wish to buy a property over the next five years. Much depends on being able to predict the number of persons who will be in the normal first-time buyer age groups and on the future ability of people to compete in the housing market. However, Figure 5 represents an attempt to determine the future short-term demand based on 'nil net migration' and on the evidence currently available. It shows that for the period 1998 to the end of 2003 the estimated minimum requirement for first-time buyer dwellings might reasonably be expected to be in the region of 800 dwellings. As alluded to earlier, the projected housing requirements may have to be marginally increased to take into account the recent growth in net immigration.

Figure 5: Estimated first-time buyer housing requirements, up to the end 2003

	Dwellings
Estimated shortfall at the start of 1998[19]	300
Potential additional households qualifying as first-time buyers, as a result of demographic changes - start 1995 to end 2003 (*at 50 households per annum*)[20]	300
Households likely to take advantage of their qualification to buy, under the 'twenty-year continuous residency rule' from 2000 (*at 50 households per annum*)[21]	200
TOTAL FIRST-TIME BUYER REQUIREMENT	**800**

If one assumes that the status of the respondees to the Housing Committee's 'first-time buyer survey', as set out earlier, is reflective of the nature of the short-term demand over the next five years, then the demand might reasonably be split as follows -

- 25 per cent one-bedroom flats;
- 35 per cent two-bedroom dwellings;
- 40 per cent three-bedroom dwellings.

It is important to recognise, of course, that the size of the shortfall would be considerably increased if the States were to decide to relax the Housing Regulations, in order to allow newcomers to obtain residential qualifications after 15 years' continuous residence, as proposed by the former Housing Committee.

The requirements of those without housing qualifications

There are a large number of persons currently living and working in the Island who do not currently enjoy housing qualifications under the Housing (Jersey) Law 1949 and its attendant Regulations. These include unskilled and semi-skilled migrant labourers who work in the tourism and agricultural industries, and other newcomers who have settled in the Island since 1st January 1980, having been attracted by the prospects of employment in retailing, construction and, increasingly, the finance industry. Neither group is permitted to occupy residential units other than staff accommodation provided by their employees, or lodging accommodation in the form of registered lodging houses, or private lodgings.

The long-standing problems historically associated with the standard of staff and lodging accommodation in the Island and the level of rents charged for such accommodation are addressed in the previous review of June 1998 and have been well documented elsewhere. There is evidence of significant improvements in staff accommodation in recent years, but the situation with regard to lodging accommodation remains problematic.

Since 1994, the economic revival has attracted increasing numbers of unqualified persons to the Island and, unfortunately, there are now signs that the demand for lodging accommodation is once again resulting in severe shortages. There is also anecdotal evidence of high rents and worsening conditions being experienced by lodgers, most notably in unregistered private households. This is having a particularly adverse impact on those unqualified persons who work in the relatively poorly remunerated areas of the tourism and hospitality industries, in cases where staff accommodation is not made available to them.[22]

It is acknowledged that there is a lack of good, hard data on current conditions in the lodging market, but media coverage in the last two years has highlighted concerns that accommodation for unqualified persons in Jersey might be heading back towards the conditions that existed in the late 1980s. A number of local newspaper reports over this period have kept these problems in the public eye and have drawn attention in particular to -

- the growing numbers of transient workers who, having found employment in the Island, were unable to find a place to live;
- the difficulties this presents for employers;
- the increasing amount of accommodation being offered as ‘sleeping-only rooms’ for exorbitant prices.

The publication in April 1998 of the Citizens Advice Bureau’s, ‘Annual Report, 1997’ featured particularly prominently in local media coverage. This report highlighted the increase in problems related to housing among the Bureau’s growing workload, and featured the particular difficulties being faced by minority groups. A quarter of the housing issues raised by clients of the Bureau related to unsatisfactory housing conditions and problems of affording spiralling rents. The report also identified the shortage of affordable family housing as a constant social problem for non-qualified lodgers. This was illustrated by the fact that, during 1997, 14 non-qualified families presented themselves to the Bureau as homeless.

The Bureau’s report made reference to “*some unscrupulous landlords taking advantage of unqualified people in lodging accommodation who are forced to accept excessive rent increases for fear of losing their homes*”. These sentiments were echoed in a special interview with the Portuguese Consul, which was included in the same report. He criticised the extent to which foreign nationals are exploited with expensive, poor quality housing.

More recently, in November 1998, the manager of the Jersey Citizens Advice Bureau drew attention to a continuing growth in housing-related issues/problems dealt with by the bureau in the first nine months of that year. He suggested that housing costs are escalating out of control and pointed out that there are low-income families in the non-qualified sector who sometimes have to pay in excess of half of their total income for their housing.

The Housing Registration Scheme for non-qualified people

In June and July 1997, the Housing Department undertook a survey of non-qualified people arriving in Jersey between 1st January 1980 and 31st December 1984 and who have remained in the Island continuously since. This provides some useful information about those who can be expected to obtain full housing qualifications under the ‘20 year continuous residency rule’ from 2000 to 2005. The results have been referred to in the previous sections which address future requirements for social rented and first-time buyer housing over the next five to six years.

As a follow-up to this survey, the Housing Department has recently compiled an official register of non-qualified people who have at least ten years' continuous residence to-date. Figure 6 provides a breakdown of those currently on the register. It can be seen that by November 1998 some 1,065 registration forms had been accepted, which represents 1,915 persons without qualifications and 239 persons with qualifications (e.g. husbands, wives, children etc.).

Figure 6: People on the Housing Department Register, with and without qualifications, November 1998

Relationship	**Number of people**	
	Without qualifications	With qualifications
Person who registered	1,065	
Husband	100	45
Wife	201	41
Son	187	23
Daughter	195	33
Grandson	3	1
Partner	125	66
Friend	9	16
Other	30	14
Total	**1,915**	**239**

Source: Housing Department

The figures generally support the findings of the earlier survey and would suggest that there may be a requirement for something approaching 100 additional social housing units per annum between 2000 and 2010 as a result of people obtaining their housing qualifications under the '20 year continuous residency rule'.

Figure 7 provides information on the type of accommodation currently occupied by households on the register. There remains some uncertainty about the exact nature of the accommodation occupied by a significant proportion of the households in the "other" category. However, the figures suggest that some 67 per cent are presently living in lodging or staff accommodation, and that the majority of these are in private (unregistered) lodgings.

The indications are that approximately half of those on the register will look to buy when they obtain their housing qualifications and the remaining half will seek to rent.

Figure 7: Accommodation occupied by households on the Housing Department Register, November 1998

Accommodation type	Households registered Number	Percentage
Registered lodging house	143	13.5
Lodgings	405	38.1
Staff accommodation	165	15.5
States tenancy	13	1.2
Other[23]	337	31.7
Total	**1,063**	**100.0**

Source: Housing Department

Homelessness

The level of 'homelessness' is an indicator of extreme housing stress, in that it includes people who lack any form of accommodation. Homelessness is seldom publicly evident in Jersey and until recently it has not been widely known. However, a well-publicised Homeless Outreach Project which started in October 1996 has drawn attention to the problem locally, and the issue is now regularly addressed by the local media.

The latest information actually published by the Shelter Trust is the General Manager's annual report for 1997, which makes it clear that homelessness remains a significant issue for the Island. Between October 1996 and December 1997, 73 persons (including nine women) were identified by the Outreach Group as living rough in the Island. Of these, 48 were known to have been sleeping rough for less than three months. It is clearly a major concern that such a level of homelessness should occur in the Island, and this has been attributed to a shortage of affordable accommodation (especially affordable lodging house accommodation) and the decriminalisation of the Destitution Law, which allowed non-qualified people to live on the streets (i.e. people who previously would have been bound over to leave the Island).

By the end of December 1997, only seven people were known to be sleeping rough. At that time, the whereabouts of 19 previously identified homeless individuals were unknown, but the remainder were either accommodated in the Shelter (27), or in a nursing home (one), or had returned to private accommodation (11), or had returned to the United Kingdom (eight).

The Shelter Trust has played and is playing a major role in addressing the worst excesses of homelessness, and the demands on its services are continuing to grow. The Shelter accommodates 51 people on a regular basis in its three hostels, and the number of people using these facilities rose by 40 per cent from 114 during 1996 to 160 during 1997. The early indications are that these high numbers using the Shelter Trust's facilities have continued throughout 1998. However, the situation has got worse, because the length of stay for homeless individuals is greater, and during 1998, for the first time, the capacity of the facilities was stretched for the whole year, not just over the winter months. As a consequence of all the hostel beds being full in November 1998, there were 16 people identified as sleeping rough.

More recently, the Health and Social Services Department has established an urgent need to provide more beds for the homeless, especially during the winter months. This call for more beds emerged during the Christmas period, when not only were all three shelters filled to capacity, but also the overspill shelter at Aquila Youth Centre. As a consequence, about ten people were consistently being turned away and forced to remain on the streets.

In an attempt to alleviate the immediate problems, a temporary hostel has been created at No. 6, Pleasance Terrace on Route du Fort. This is on loan to the Shelter Trust until March 1999. Meanwhile, the manager of the Shelter in Kensington Place has emphasised the urgent need for another shelter on a permanent basis.

Particular concerns have been raised over recent years by various organisations (including the Citizens Advice Bureau, the Children's Service and the Probation Service) about the potential difficulties faced by vulnerable young people in finding suitable accommodation. In a direct response to those concerns the former Housing Committee recently changed its policies in relation to under 25s to allow them to qualify for States Rental Housing, or for Private Sector Rent Rebate, where they are considered to be vulnerable.

Housing supply

Supply of social housing and other demand housing

Figure 8 below provides a breakdown of annual housing completions since 1986. The figures demonstrate an impressive performance in meeting the requirements for purpose-built States Loan and social rented housing in the Island in the period between 1986 and 1995. This success owed much to the direct role played by the States of Jersey in housing provision. Over this period there was a net average of 212 dwelling units constructed each year. In 1996, however, only 85 dwelling units were constructed, and this relatively poor performance became very much worse in 1997, when there was a net loss of some 125 dwelling units, primarily as a result of the on-going programme to redevelop outworn estates. Completions for 1988 are disappointing and comprise almost entirely the 47 social rented units constructed on the former OTC site at First Tower. However, this reflects the view held to the end of 1996 that there was a relative equilibrium between the supply of land and the demand for social need and first-time buyer housing.

Completions in what has become known as the Category A housing sector (i.e. social housing) have been complemented during the period by the completion of a considerable amount of other demand housing (i.e. Category B Housing). These latter developments might reasonably be regarded as 'windfall' developments in that they are unplanned and have brought unexpectedly high yields. They consist of privately-owned family houses and flats owned or rented in the private sector (including lodging accommodation for non-qualified persons), which have come forward as part of the normal development process. Between 1986 and 1997 (i.e. the latest year with complete statistics) there were some 2,325 such dwelling units completed (net) at an average of approximately 194 per annum. It is interesting to note that, between 1991 and 1997, 60 per cent of these 'windfall' developments occurred in the three urban parishes of St. Helier (43 per cent), St. Saviour and St Clement.

Figure 8: Annual housing completions (1986 to 1998)

Completed dwellings (net)			
Year	**Purpose-built States loan housing**	**Social rental housing**	**Other demand housing**
1986	107	40	232
1987	23	225	106
1988	108	136	103
1989	-	147	128
1990	17	130	289
1991	76	75	325
1992	139	130	159
1993	187	86	243
1994	81	197	175
1995	165	50	199
1996	15	70	224
1997	12	(137)	142
1998	-	51	173 (at Nov.)
Sub-total	**930**	**1,200**	**2,498**
Sub-total	**2,130**		
TOTAL COMPLETIONS	**4,628**		

Source: Department of Planning and Building Services

Figure 9 sets out the likely supply of new dwellings which can directly be expected to contribute to meeting outstanding housing requirements up to the end of 2003. A breakdown of the sites involved is given in Appendices 2 and 3. The figures show that although there remains a fairly extensive new build programme for social rented housing in the next five years, actual net gains will be significantly reduced, due to the continued redevelopment and/or improvement of several Housing Committee estates at much reduced densities (e.g. Elysee Estate, Nicholson Park, Le Geyt Flats).

The new build programme specifically for purpose-built first-time buyer accommodation in the next five years relies on the Belle Vue Pleasure Park site, St. Helier Waterfront and one smaller site, which in total are estimated to yield approximately 155 first-time buyer dwelling units in that period.

Figure 9: Estimated dwelling yield, 1999 to end 2003

Housing type	**Estimated dwelling completion**	**Estimated dwelling losses**	**Estimated dwelling completions (net)**
Planned social rented housing	683	(164)	519
Planned purpose-built States loan (first-time buyer)	155	-	155
Estimates of other demand housing - • 1999 and 2000[24] - 1(1)(a)-(j) - 1(1)(k) and lodging/staff			394

accommodation • 2001 to 2003 (total)[25]			134 450
TOTAL			**1,652**

Source: Department of Planning and Building Services

Figure 9 indicates that the majority of the estimated net housing yield over the next five years is likely to arise from private ‘windfall’ sites, which come forward as part of the normal development process.

Supply of lodging accommodation

The growing demand for lodging accommodation throughout the 1990s (with the exception of the recession years of 1993 and 1994) has been directly responded to by the market. Figures 10 and 11 show that the number of registered lodging houses in the Island almost doubled from 96 in 1990 to 188 in November 1998, and that the number of registered lodging house beds have correspondingly increased by 150 per cent from 1,767 to 4,427 during the same period. This increase in registered lodging houses has largely been achieved through the conversion of outworn hotels and guest houses.

Figure 10: Registered Lodging Houses, 1990 to 1998

Source : Housing Committee

The future prospects for further new lodging accommodation have now been constrained by recent changes in States’ policy. In June 1998, the former Housing Committee effectively decided that it will not support the creation of new lodging houses and will in future give priority to developments for the residentially qualified. Furthermore, in August 1998, at a joint meeting of the Presidents/Vice Presidents of Policy and Resources, Finance and Economics, Planning and Environment and Housing Committees, it was agreed that the States should impose a moratorium on the development of lodging houses, through the operation of the Regulation of Undertakings and Development Law and the Lodging House Regulations, to the effect that -

“for the foreseeable future, no lodging houses will be allowed and that the provision of new accommodation should

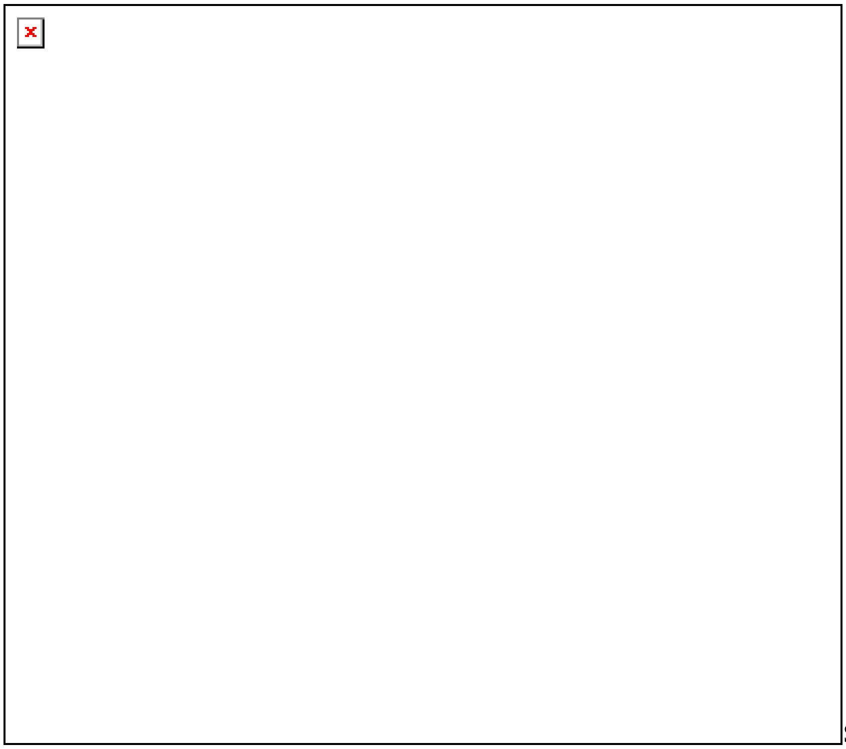
favour the local market".

Therefore, in the foreseeable future, it is envisaged that the only new lodging accommodation to become available will be as a result of -

(i) several lodging house development proposals already in the pipeline, which are currently being implemented or which are otherwise committed;

(ii) the impending release of lodging accommodation by persons gaining full residential qualifications after 20 years' continuous residence. As previously outlined, a survey of those who are set to qualify in this manner, which was conducted by the Housing Committee in June 1997 and the current Housing Registration Scheme, both indicate a potential release of 100 lodging units per annum between 2000 and 2004. The present indications are that these annual numbers will increase over time and that 14 per cent of the accommodation released will be registered lodging accommodation.[26]

Figure 11: Registered lodging house beds, 1990 to 1998



Source: Housing Department

The future adequacy of the stock of lodging accommodation will be dependent to a large extent on the success, or otherwise, of the measures employed to limit job growth and control immigration in the Island. These measures have yet to be effectively implemented and there has been significant job growth in the last two years, which has led to an influx of migrants and put added pressure on this sector of the market. The end of the year manpower returns will serve to demonstrate whether the recent changes to the Regulation of Undertakings and Development Law are proving effective in restricting job growth and net immigration. There are grounds for some cautious optimism in this regard. It is reasonable to assume that for the future there will be no repetition of the increase in the manpower figures that occurred in 1997. The control of job growth should reduce net immigration by those persons without residential qualifications, and reduce demand for lodging house accommodation. It is in the light of these new measures to restrict job growth, and bearing in mind the other factors referred to earlier, that the former Housing Committee decided to withdraw its support for the creation of additional registered lodging houses, where the proposals do not already have a licence under the Regulation of Undertakings and Development Law.

Projected shortfall of social housing sites

Comparing housing supply with requirements

It can be seen from Figure 12 that after deducting planned and other likely housing completions from estimated requirements up to the end of year 2003, there is a projected ‘shortfall’ in rounded numbers of some 625 social rented dwellings and 350 first-time buyer dwellings.

Figure 12: Relationship between the requirement and supply of States loan (first-time buyer) and social rental housing, to year end 2003

Housing requirements and supply	Social rented dwellings	First-time buyer dwellings
Estimated units required	1,140 (at end 1998)	800 (at January 1998)
Less planned new build completions (net)	(519)	(155)
Less a proportion of private (a) - (j) developments completed during 1998[27]		(36)
Less a proportion of likely private (a) - (j) developments, 1999 and 2000[28]		(118)
Less a proportion of private developments, which might reasonably be expected to contribute to meeting identified requirements, 2001 to 2003[29]		(135)
Estimated shortfall	**621**	**356**

Source: Department of Planning and Building Services

The shortfall in the supply of social rented housing is a problem and an annual projection of how this might impact on the States Rental Waiting List over the next five years is included in Appendix 4. However, the shortfall figures relating to first-time buyer requirements need to be approached with more caution, because they rely to a large extent on assumptions about the likely contribution of sites, which come forward in the private sector, as part of the normal development process. Clearly, the actual impact of these 'windfall' developments on first-time buyer requirements will depend to a large extent on the type of dwellings constructed, and the affordability of either the newly-constructed dwellings or dwellings released onto the market as a result of their construction.

The Housing Department is currently undertaking a sample survey of housing sale applications received between May and November 1998, primarily to determine how many existing private houses and new private developments are bought by first-time buyers. Preliminary results suggest that approximately 30 per cent of these private properties may have been sold to first-time buyers during this period, although further work is necessary to confirm the findings. The majority of sale applications from first-time buyers were for two-bedroom houses and flats and three-bedroom houses. The preliminary results of the sample survey also reveal that the great majority of properties sought by first-time buyers during the period in question were in the price range £150,000 - £250,000.

The size of the shortfall would be considerably increased if the States were to decide to relax the Housing Regulations in order to allow newcomers to obtain residential qualifications after 15 years' continuous residence. This is a matter that will be addressed by the housing forecast consultants. Insofar as the Housing Committee has indicated that the introduction of the 20 year continuous residency rule, with effect from the year 2000, would produce 100 extra dwelling requirements for each year that the years are brought forward, there would be at least an extra 100 units required in that year.

Social housing shortfall by housing type

Figure 13 represents an attempt to break down the estimated shortfall in social rented and first-time buyer housing by size requirement. It demonstrates that the great majority of the estimated outstanding requirement in the social rented sector will be for one and three-bedroom dwellings, which represent approximately 87 per cent of the total requirement. In contrast, it is estimated that the shortfall of first-time buyer dwellings will mainly comprise two and three-bedroom accommodation (i.e. over 82 per cent).

Figure 13: Shortfall in social rented and first-time buyer housing, by size of accommodation required, to the end of 2003

Units by type and tenure	**Gross requirements [30] [31]**	**Less completions due from planned developments (net)**	**Less estimated contribution from private 'windfall' developments [32]**	**Outstanding requirements**	
				No.	**%**
Social rented					
one-bedroom	399	(131)	-	268	43.2
two-bedroom	399	(316)	-	83	13.4
three-bedroom	342	(72)	-	270	43.4
All social rented	1,140	(519)	-	621	100.0
First-time buyer					
one-bedroom	200	(25)	(110)	65	18.3
two-bedroom	280	(67)	(95)	118	33.1
three-bedroom	320	(63)	(84)	173	48.6
All first-time buyer	800	(155)	(289)	356	100.0
Total social housing requirement	**1,940**	**(674)**	**(289)**	**977**	

Source: Department of Planning and Building Services

Estimated additional land requirements

Figure 14 gives a broad indication of the potential scale of additional housing land requirements, based on the estimates of the number and size of the outstanding requirements for new dwellings and whether the sites made available are in urban or suburban locations.

It is recognised of course that the calculations are imprecise, being based on average theoretical development densities. In reality, there will be a range of site locations brought forward to meet identified housing requirements, each with their own individual opportunities and constraints. Precise measurements of land requirements are largely dependent upon detailed studies of the development potential of individual sites and on a site specific 'design-led' approach to development.

Figure 14: Estimated additional land requirements to meet identified housing shortfall, to end 2003

Housing type and size[33]	**Additional dwellings required**	**Additional theoretical land requirements**			
		Urban[34]		**Suburban[35]**	
		Vergées	**Acres**	**Vergées**	**Acres**
SOCIAL RENTED					
one-bedroom flat	268	7.7 - 8.6	3.4 - 3.8	12.6 - 13.5	5.6 - 6.0
two-bedroom flat	83	3.6 - 4.1	1.6 - 1.8	5.9 - 6.3	2.6 - 2.8
three-bedroom house	270	25.4 - 26.3	11.3 - 11.7	38.0 - 46.8	16.9 - 20.8
Total	**621**	**36.7 - 39.0**	**16.3 - 17.3**	**56.5 - 66.6**	**25.1 - 29.6**
FIRST-TIME BUYER					
one-bedroom flat	65	1.8 - 2.0	0.8 - 0.9	2.9 - 3.2	1.3 - 1.4
two-bedroom flat	118	5.0 - 5.6	2.2 - 2.5	8.3 - 8.8	3.7 - 3.9
three-bedroom house	173	16.2 - 16.9	7.2 - 7.5	24.3 - 29.9	10.8 - 13.3
Total	**356**	**23.0 - 24.5**	**10.2 - 10.9**	**35.5 - 41.9**	**15.8 - 18.6**
TOTAL					
one-bedroom flat	333	9.5 - 10.6	4.2 - 4.7	15.5 - 16.7	6.9 - 7.4
two-bedroom flat	201	8.6 - 9.7	3.8 - 4.3	14.2 - 15.1	6.3 - 6.7
three-bedroom house	443	41.6 - 43.2	18.5 - 19.2	62.3 - 76.7	27.7 - 34.1
Total	**977**	**59.7 - 63.5**	**26.5 - 28.2**	**92.0 - 108.5**	**40.9 - 48.2**

Source: Department of Planning and Building Services

Nevertheless, this theoretical exercise is very useful in putting into perspective the extent of required additional housing land. Figure 14 shows, for example, an estimated theoretical need to release an additional 26 to 28 acres of urban land, or 41 to 48 acres of suburban land to satisfy all the identified shortfall in the next five years.

It is perhaps easier to visualise the scale of this outstanding land requirement if one recognises that -

(i) Keith Baal Gardens (formerly the Ritz Hotel site) occupies approximately one acre of urban land and comprises 47 one and two-bedroom flats;

(ii) the land zoned for residential purposes at the former Belle Vue Pleasure Park site occupies approximately ten acres in what will be a suburban location and is to be developed for a mix of 157 flats and houses.

Housing targets

Of course, the estimated shortfall in the provision of social rented and first-time buyer housing covers a period of five years and does not need to be provided all at the same time. However, it is important to ensure that, as far as it is practicable, an adequate supply of land is made available to meet the required additional building programme throughout the period. The ideal annual target figure for each type of additional housing required is shown in Figure 15, although these take no account of the likely capacity of the local construction industry during the years in question.

Figure 15: Housing targets for additional social rented and first-time buyer housing provision, 1999 - 2003

Housing type	**Annual target for additional housing requirement by year**[36]					**Total**
	1999[37]	**2000**[38]	**2001**	**2002**	**2003**	
Social rented *(with allowance for slippage)*[39]	- -	100 *(110)*	150 *(165)*	175	200	625
First-time buyer *(with allowance for slippage)*[39]	-	150 *(165)*	100 *(110)*	50	50	350
Total ***(with allowance for slippage)***[39] ***(depends on capacity of local construction industry)?***	**-**	**250** ***(275)***	**250** ***(275)***	**225**	**250**	**975**

Source: Department of Planning and Building Services

The targets for social rented accommodation are based on projections of the Housing Rental Waiting List as set out in Appendix 4, and have been adjusted to -

- recognise acceptable waiting list numbers *(N.B., 200 families or individuals);*
- take account of the lead-in time before dwellings can be completed;
- round up the figures and spread the programme a little more evenly;
- include an additional allowance of ten per cent to the target figures, in order to counteract the tendency for certain building projects to fall behind schedule and to offset possible difficulties in negotiating with landowners.

Similarly, the annual target for additional first-time buyer accommodation are based on projections as set out in Appendix 5.

In view of the large number of assumptions which underpin these estimated target figures, it is especially important to review them regularly and make modifications if necessary. However, the current evidence suggests there will be a consistent annual requirement for the completion of additional social housing units between 2000 and 2003. During this period, the annual requirements for additional social rented units will steadily increase, whilst in contrast, the annual requirements for first-time buyer units will be very much front loaded.

The targets set out in Figure 15 serve to demonstrate the particular urgency required in bringing sites forward quickly. This is especially important, given the normal lead-in time of two or three years before dwellings can be completed on the most straightforward of specified sites, and the possibility that this could extend to four or five years in some cases. Using three years as an average lead-in time, for example, the land for most of the additional homes required would need to be secured during 1999 and the remainder next year.

Tackling the projected housing shortfall

Objectives of the present strategy

One of the main purposes of this report is to help ensure that sufficient land is available in practical terms to meet projected housing requirements. It follows therefore, that sites must be identified which are -

(i) suitable for the type of housing required;

(ii) free, or readily freed from planning, physical and ownership constraints; and

(iii) capable of being developed economically.

Since a projected shortfall in social housing sites was first formally identified in the Residential Land Availability Review of October 1997, the strategy for site identification has been aimed, in the first instance, at -

> *"optimising the opportunities for developing social housing (i.e. social rental and first-time buyer housing) within the built-up area, in accordance with the strategic policy objectives of the States".*

This 'Urban Infill' approach, which broadly seeks to make full and effective use of land within the existing urban area, has become known as the 'Urban Site Initiative' and its advantages and disadvantages are set out in Figure 16.

Figure 16: Assessment of the urban infill option for the development of social housing

Advantages		

Economic	Social	Environmental
• existing services and facilities readily available; • makes good use of existing infrastructure and creates less demand for new infrastructure; • allows for higher density housing and more economic use of land.	• provides high levels of access to social facilities; • fewer problems with regard to local acceptability; • newcomers add to the vitality of town; • assists in reducing vandalism and crime; • takes advantage of an already existing broad-based community; • provides opportunities to remove bad neighbour uses.	• allows for more compact, land-efficient forms of development/less land taken for housing and associated facilities; • alleviates development pressures elsewhere and protects the countryside from development; • can reduce need to travel and associated energy consumption, pollution, etc.; • people can walk or cycle to work, the shops and other community facilities; • well-served by public transport; • allows for reduced energy consumption through less space heating.
Disadvantages		
Economic	**Social**	**Environmental**
• high land values; • may be high site development and infrastructure costs on intensively developed or severely derelict land; • may require subsidies/States funding to offset commercial site values and bring forward; • cramped, restricted sites may lead to high development costs; • high density development may require higher levels of maintenance for local infrastructure; • land assembly problems; • requires more effort and money to lever development.	• contrary to the normal housing expectations of many future occupants; • may confront occupiers with relatively high levels of noise, lower air quality, less open/amenity space; • potential loss of quality of life for existing residents in certain areas; • may concentrate the most disadvantaged members of the population within the urban area.	• problem if urban open spaces, playing fields or wildlife habitats are developed; • potential adverse impact on the character of certain areas; • potential to improve the urban fabric/townscape and to assist current plans for promoting urban regeneration.

Source: Department of Planning and Building Services

The Housing Forum

In December 1997, the Planning and Environment and former Housing Committees agreed as a joint initiative to establish a special Housing Forum in order to identify the extent to which the projected housing shortfall can be met from sites in the built-up area, and how that contribution might best be achieved within the required timeframe. Although it has not met recently and is not scheduled to meet again until well into the new year, the ‘Housing Forum’ from its inception has always been regarded as an on-going process. The meetings of the forum held in the first half of 1998 involved representatives of the main States’ committees and departments, agencies, professionals and other bodies and groups associated with the provision of housing. It is widely recognised that they have proved invaluable in initiating positive progress towards addressing the Island’s housing problems. Indeed, as a direct result of the forum, the perception of housing problems has significantly shifted, and dialogue between States’ Committees and others has broadened. This, in turn, has stimulated the exchange of new ideas, and the level of commitment by those involved with the Forum has been very impressive.

An account of the principal findings of the Forum and its associated working groups is set out in the previous review report of June 1998. Since May 1998, the work of the Forum has been undertaken at a political level, and the future nature and focus of the Forum can best be identified, once the outcome of the current political process is known.

A corporate approach

On 5th May 1998, the Presidents of the Housing, Planning and Environment, Finance and Economics and Policy and Resources Committees and their officers met to discuss housing policy and site availability. This was the start of a regular series of meetings, which now include all the committee members. They are primarily aimed at establishing a corporate, consensual approach to tackling the Island’s housing problems and generally to assist the development of strategy for the release of sites to meet identified additional social housing requirements.

The initial meetings have been instrumental in -

- promoting the regular updating of the Residential Land Availability Review;

- steering the work of the Housing and Planning and Building Services departments on urban site investigation, which has involved refining the list of sites which are suitable for the development of social housing and identifying any difficulties/site constraints which might call for a resolution process at a political level;

- encouraging the further investigation of the potential of land in States' ownership for social housing purposes;

- steering the on-going work, based on 'design-led' feasibility studies, in order to determine the potential housing yield of identified sites, together with the likely costings and valuations involved in developing each site;

- ensuring the options for States funding are fully explored and evaluated;

- investigating and evaluating the potential for setting up a development agency, or other agencies/bodies, which would take responsibility for the development of sites.

At their last meeting on 12th November 1998, the committees agreed a series of actions designed to ensure that the previously planned Strategic Housing Policy debate in the States would be fully informed. These actions include -

- the completion of this report *(joint report of the four committees)*;

- the preparation of a report and proposition to the States on the options for meeting identified housing needs *(the Planning and Environment Committee)*;

- the establishment of a 'Site Action Group' to identify sufficient suitable sites to meet identified housing needs up to the end of 2003 and to produce a report of findings *(the Housing and Planning and Environment Committees)*;

- the provision of finance to fund the acquisition of sites identified as part of the 'Urban Site Initiative' by the 'Site Action Group' *(the Finance and Economics Committee*);

- the completion of a consultation exercise between the four committees on the findings of the Pricewaterhouse Coopers report, which was commissioned to investigate and evaluate the financial arrangements/options available for the development of required housing sites *(all four committee*s);

- determining the future "focus" of the next meeting of the Housing Forum *(all four committees)*;

- reporting on future population assumptions *(Policy and Resources Committee).*

The findings of the 'Site Action Group'

The 'Site Action Group' comprises representatives of the Housing, Planning, Property Services and Treasury departments and was set up to -

- identify sufficient suitable sites for residential development to meet forecast social rented and first-time buyer housing need up to the end of 2003, and to note private development 'windfall' sites which may add to the overall housing stock;

- produce feasibility studies for the identified sites showing how residential development which matches the need in terms of type and size of dwelling, as well as the numbers, that can be achieved in the most cost-effective manner but with due regard to planning and environmental policies;

- report the findings of the Group to the joint meeting of the four Committees.

Clearly, the process of site identification and assessment is on-going and the work will be continuously refined and re-assessed. However, the latest findings of 'Site Action Group' include the identification of 21 urban sites, which it is thought could reasonably be brought forward for social rented housing throughout the next five years up to the end of 2003, provided certain constraints can be overcome and the necessary financial mechanisms are in place to write off commercial land values.

All the sites under investigation are privately owned and the owners have indicated a willingness to discuss redevelopment. In total, the sites have an estimated approximate yield of some 300+ social rented dwellings, based on preliminary 'design-led' feasibility studies. These estimated yields may alter as feasibility studies are completed, and, in any event, the potential yields can vary significantly, depending on the mix which is finally adopted for each site.

In addition to these 21 sites, the 'Site Action Group' has also identified some 14 private development sites, which have outstanding planning consents, or which have been the subject of development inquiries and which may provide accommodation within a price range accessible to first-time buyers. It has been estimated that these sites could yield some 400+ dwellings, although much would depend on the eventual mix chosen for each site. Once again it is unlikely that any of the sites in question will provide accommodation for first-time buyers, unless there is considerable intervention and financial subsidy by the States, or there is a mixed commercial and residential development, which allows for cross-subsidy in order to achieve low cost housing.

A number of other possible development sites have been considered by the Site Action Group, although these are less likely to produce social housing within the required timeframe. They include several sites identified in the Island Plan which have yet to be developed. A summary of the status of the remaining Category A sites identified in the Island Plan is included in Appendix 10 for information.
The broad impact of these findings on the identified shortfall of sites is summarised in Figure 17. They suggest that if all the identified urban sites are secured, they will be sufficient to meet a large proportion of the projected shortfall of social housing requirements up to the end of 2003. However, this will largely depend on the necessary financial and organisational mechanisms being in place and on there being sufficient political will to secure the required dwellings.

Figure 17: The impact of the identified potential urban housing sites on the projected social housing shortfall, up to the end of 2003 (assuming they are all secured)

Dwelling units by type and tenure	**Projected shortfall of dwellings (up to end 2003)**	**Estimated dwelling yield from urban sites identified by the 'Site Action Group'[40]**	**Net outstanding dwelling requirement (up to end 2003)**
Social rented			
one-bedroom	268	122	146
two-bedroom	83	83	-
three-bedroom	270	95	175
All social rented	621	300	321
First-time buyers			
one-bedroom	65	117	(52)
two-bedroom	118	272	(154)
three-bedroom	173	20	153
All first-time buyers	356	409	(53)

The figures point to a shortfall of some 300 social rental dwellings, if all the 21 urban sites identified as suitable for this purpose are developed. In contrast, the total estimated yield from urban sites identified as suitable for first-time buyer dwellings would appear, at first sight, to exceed the projected dwelling requirements for this purpose.

A closer examination of the figures, however, reveals a mismatch between the type of housing required for first-time buyers and the type of housing yield actually suggested by the 'Site Action Group' from identified urban sites. This points to a very large potential over-provision of one and two-bedroom first-time buyer dwellings and an under-provision of three-bedroom dwellings. Of course, it should be possible to alter the mix of the yield from identified urban sites to more nearly reflect the actual first-time buyer dwelling types required. It may also be possible to transfer some of these sites to meet the identified shortfall of one-bedroom social rented dwellings. However, the ability to do this will be constrained by the nature of the sites and the need to -

- comply with design and townscape requirements;
- achieve appropriate levels of amenity for family accommodation; and
- achieve reasonably cost-effective developments, which represent good value for money.

Whilst recognising that the work on identifying and assessing urban sites is a continuous process and new sites may come forward in the interim, it is apparent that even if the sites currently identified are all secured, they are unlikely to be sufficient in themselves to accommodate all the identified additional social housing requirements for the next five years. Furthermore, it is important not to lose sight of the difficulties that can be experienced in obtaining sites for residential development and the effect of this on the likely timescale for the completion of dwellings. There are constraints affecting many of the current identified sites (e.g. covenants, loss of tourism bed spaces), there may be difficulties in negotiating site values with owners, and last, but not least, no agreement has yet been reached on the financial and organisational mechanisms which will be essential to achieve the required low-cost homes.

The effect of the above-mentioned factors on the identified built-up area sites is potentially significant and the estimated shortfall in dwelling requirements outlined in Figure 17 may therefore be significantly understated. Figure 18 sets out an alternative estimate of outstanding social housing requirements up to the end of 2003, based on the following assumptions -

(i) that the likely yield from sites identified as suitable for social rented purposes, will only include that from sites where their release in the required timeframe are currently regarded as 'definite' or probable;

(ii) that sites identified as suitable for first-time buyer purposes will be left to private developers, without States' intervention. In such circumstances, the contribution of private schemes to the first-time buyer requirement is unlikely to exceed 30 per cent.

Figure 18: An alternative scenario of the potential impact of identified urban housing sites on the projected social housing shortfall, up to the end of 2003

Dwelling by type and tenure	Projected shortfall of dwellings (up to end 2003)	Estimated dwelling yield from identified urban sites[41]	Net outstanding dwelling requirements (up to end 2003)
Social Rented			
one-bedroom	268	87	154
two-bedroom	83	110	-
three-bedroom	270	31	239
All social rented	**621**	**228**	**393**
First-time buyers			
one-bedroom	65	35	30
two-bedroom	118	82	36
three-bedroom	173	6	167
All first-time buyers	**356**	**123**	**233**

The alternative scenario set out in Figure 18 points to a net outstanding requirement for some 400 social rented homes rather than the 300 referred to earlier, of which about 60 per cent are three-bedroom dwellings. It also suggests that there would be an outstanding requirement for approximately 230 first-time buyer homes, of which some 72 per cent are three-bedroom dwellings.

Given the limited timeframe available for remedial action, there would now appear to be a case for investigating the potential of sites beyond the present built-up area boundaries, in order to accommodate projected additional dwelling requirements (notably three-bedroom dwelling requirements) for both social rented and first-time buyer accommodation.

Other locational options for meeting housing requirements

In the previous Residential Land Availability Review of June 1998, it was stated -

"If it does not prove possible to meet the Island's identified additional social housing requirements from urban sites, the Planning and Environment Committee and ultimately the States will need to give consideration to other options elsewhere" (R.C. 32/98, pages 56-57).

Given that the findings of this report, as set out earlier, suggest it is not possible to meet all the Island's identified additional social housing requirements from urban sites, it would now appear appropriate that active consideration is given to other site development options. The main alternative site development options include -

(i) *Urban extension*
(i.e. planned development on the edges of existing urban/built-up areas on open, or previously developed land);

(ii) *Village extensions*
(i.e. expansion of selected villages with adequate capacity and a range of services).

The advantages and disadvantages of the alternative options for urban and village extensions are set out in Appendices 8 and 9. In pursuing these options in order to make good a shortfall in supply, as part of what might be regarded as a 'sequential approach' to site selection, it will remain important to have regard to the principles of 'sustainable development'.

Accordingly, every effort would have to be made to ensure that the maximum opportunity is taken to re-use/re-cycle derelict land, or land which has previously been developed, and to resist the rezoning of ‘green field’ sites in the countryside.

Other options, including the establishment of new villages/settlements, the completion of small dispersed building groups in the countryside and isolated development in the countryside are not regarded as suitable for Jersey. The latter two options are likely to have an undue detrimental effect on the character and quality of the Island’s countryside, which has long been regarded as one of Jersey’s finest assets. The option of new settlements has been discounted because of the restricted number of required dwellings, the short timescale involved, difficulties of land assembly, likely problems with the viability of providing community facilities, utility services and other infrastructure, the propensity to create ghettos of social housing in what are effectively dormitory housing estates, and last, but not least, the comparatively high environmental impacts of such developments.

APPENDIX 1

Assessment of requirement for social rented dwellings, by type, as at end 1998

Housing priority	Accommodation requirement					
	one-bed	**two-bed**	**three-bed**	**four-bed**	**five-bed**	**Total**
(a) States Rental [42]						
Group 1	73	93	25	-	-	191
Group 2	25	60	14	-	-	99
Group 3	10	30	10	-	-	50
Group 4	10	17	6	-	-	33
Total	**118**	**200**	**55**	-	-	**373**
(b) States Transfer List						
Most urgent/urgent medical	66	31	15	3	-	115
Good management	18	19	10	2	-	49
Under-occupied	106	34	4	1	-	145
Overcrowded/in B/S	1	5	92	33	1	132
Less urgent medical	17	8	8	1	-	34
Other (inc. hostel)	-	19	1	-	-	20
Total	**208**	**116**	**130**	**40**	**1**	**495**
(c) Total specified requirements (a + b)	*326*	*316*	*185*	*40*	*1*	*868*
Less units presently occupied by those seeking transfers	**(128)**	**(256)**	**(102)**	**(9)**	**(-)**	**(495)**
Requirement (at 12th November 1998)	**198**	**60**	**83**	**31**	**1**	**373**
Percentage total[43]	**53.1**	**16.1**	**22.3**	**8.3**	**0.2**	**100.0**

Source: Housing Department

APPENDIX 2

Schedule of completions due for social rented housing, by type, 1999 to 2003

Ref.	Site	Units by type					
		one-bed	two-bed	three - bed	four-bed	five-bed	Total
Completions due by end 1999							
18236/C	Sacré Coeur Convent, (garden of), St. Helier		12				12
16767/C	Kent Lodge, 19-21, Clarendon Road, St. Helier	1	6				7
16419/D	Wilkes Gardens (Nicholson Park Phases V and VI), Les Grand Vaux, St. Helier		19	6	4		29
1270/Y	Belle Vue Pleasure Park (Phase I), La Route des Quennevais, St. Brelade		12	13			25
1270/Y	Belle Vue Pleasure Park (Phase II), La Route des Quennevais, St. Brelade	12	41				53
1270/Y	Belle Vue Pleasure Park (Phase III - parish sheltered flats), La Route des Quennevais, St. Brelade		12				12
16774/C	F.B. Cottages (Phase II), St. Clement			11 (4)			11 (4)
7404/C	Christian Science Church, St. Saviour's Road, St. Helier		26	2			28
424/M	Oak Tree Gardens, Elysee Estate (Phase II), Trinity Hill, St. Helier		4 (3)	29 (56)	1		34 (59)
15170/B	Hue Court II, vacant parking area, St. Helier *(N.B. this scheme may yet alter to yield more dwellings)*			3			3
11550/G	Le Geyt Flats (Phase IV - refurbishment and redevelopment), St. Saviour/ St. Helier		(5)	(4)			(9)
	Sub-total (net)	**13**	**124**	**0**	**5**		**142**
Completions due by end 2000							
7215/N	La Motte Ford site and adjacent properties, La Rue a Don, Grouville		4	12			16
2404/I	Sandybrook Hospital, St. Peter	8	2				10
3855/T	Postal Headquarters, Le Mont Millais, St. Helier	2	16	27			45
6107	Field 413 (parish elderly persons), La Longue Rue, St. Martin *(N.B. other site options under consideration)*	10					10

Ref.	Site	Units by type					
		one-bed	two-bed	three - bed	four-bed	five-bed	Total
10651	Highbury House and Stranton, Five Oaks, St. Saviour	2	4				6
7671/F	Field 818 (parish elderly persons), Trinity	8					8
	Sub-total (net)	**30**	**26**	**39**			**95**
Completions due by end 2001							
11550/H	Le Geyt Flats (Phase V - refurbishment and redevelopment), St. Saviour/ St. Helier		(8)	(4)			(12)
100	La Coie Hotel, Janvrin Road, St. Helier	18	70	12			100
16744/A	F.B. Cottages (Phase III), St. Clement			17 (8)	2		19 (8)
11150/D	Cannon Street/Lemprière Street/ Parade Square, St. Helier *(N.B. involves demolition of Parade Garden Flats, 1 and 3 Cannon Street and 11, 13 and 13A Lemprière Street)*	17 (15)	24 (6)	(1)			41 (22)
	Waterfront (Phase I), St. Helier *(N.B. Based on the brief for the architectural competition)*	15	60				75
	Sub-total (net)	**35**	**140**	**16**	**2**		**193**
Completions due by end of 2002							
4628	Le Marais (Phase I - Low Rise - refurbishment and new infill development), St. Clement. *(N.B. type of housing yet to be confirmed, but it is likely to be suited to three-bed family accommodation)*			12			12
?	Highlands College (former allotments), La Rue du Froid Vent, St. Saviour		8				8
?	Jersey College for Girls, St. Helier	48		4			52
424	Elysee Estate (Phase III), Trinity Hill, St. Helier	5	24 (40)	4 (10)			33 (50)
	Sub-total (net)	**53**	**(8)**	**10**			**55**
Completions due by end of 2003							
?	Stopford Road		34				34
	Sub-total (net)		**34**				**34**
TOTAL COMPLETIONS DUE		**131**	**316**	**65**	**7**		**519**

APPENDIX 3

Schedule of Completions due for first-time buyer housing, by type, 1999 to 2003

Ref.	Site	Units by type					
		one-bed	two-bed	three-bed	four-bed	five-bed	Total
Completions due by end 1999							
1270/DA	Belle Vue Pleasure Park, La Route des Quennevais, St. Brelade (Areas 5 and 6)		22	21			43
1270/CA	Belle Vue Pleasure Park, La Route des Quennevais, St. Brelade (Area 7)			24			24
7326/F	Field 492, St. Mary			12			12
	Sub-total (net)		**22**	**57**			**79**
Completions due by end 2001							
	Waterfront (Phase I), St. Helier	25	45	5			75
	Sub-total	**25**	**45**	**5**			**75**
Completions due by end 2002							

7215/N	La Motte Ford site and adjacent properties, La Rue a Don, Grouville			1			1
	Sub-total			**1**			**1**
TOTAL COMPLETIONS DUE		**25**	**67**	**63**			**155**

APPENDIX 4

Projections of the Housing Rental Waiting List, 1999 to end 2003

(assuming no additional land is released for development)

Year	Waiting list at year start	New applications	New build completions (net)	Housed through existing stock	Waiting list at year end
1999	373	300	142	150	381
2000	381	350[44]	95	150	486
2001	486	350[44]	193	150	493
2002	493	370	55	150	658
2003	658	400	34	203[45]	821[46]

Source: Housing Department and Planning and Building Services Records

APPENDIX 5

Projections of first-time buyer requirement, 1998 to end 2003

(assuming no additional land is released for development)

Year	Requirement at start of year	Additional requirement during year	Planned new build completions (net)	Estimated contribution from private 'windfall' developments[47]	Estimated requirement at end of year
1998	300	50	-	36	314
1999	314	50	79	59	226
2000	267	100	-	59	267
2001	267	100	75	45	247
2002	247	100	1	45	301
2003	301	100	-	45	356

Source: Department of Planning and Building Services

APPENDIX 6

Land availability at start of November 1998

Outstanding planning permissions				Dwellings under construction (b)	Other commitments which may yield or involve loss of units before end 2003		Total (a+b+c)
Type of housing	Number of dwellings (net)			(net)			
	Planning in principle permit	Development or P and B permit	Total number with consent (a)		Definite, probable and highly possible (c)	Other possibles (d)	
Purpose-built States loan	1	43	44	36	75	-	155
Other demand housing	320[48]	337[48]	667[48]	597	-[49]	-	1,264
Total demand housing	321	380	701	633	75	-	1,409
Need housing (rental)	55	121	176	63	327	-	566
Total (all housing)	**376**	**501**	**877**	**696**	**402**	**-**	**1,975**

Source: Department of Planning and Building Services

APPENDIX 7

Status of remaining Island Plan sites

(all these sites are presently being reviewed)

Site Ref.	Site address	I.P. suggested yield	Current status	Notes
1/6 13542	Mont Martin, New St. John's Road, St. Helier	Possible 20		Not pursued. Owner not consulted about I.P. zoning and very unwilling.
1/8 7391	Caesarean Tennis Club, Les Grands Vaux, St. Helier	Possible 40		Tennis club will remain on-site - unlikely to be available in foreseeable future.
1/9 2131	Springfield Stadium, St. Helier	Definite 125		**Abandoned.** Site redeveloped as new sports stadium.
1/10 15472	Deanery Garden, Byron Road, St. Helier	Definite 12		Not pursued. A parish-owned site. The Dean was previously not been interested in any development.
1/12 3896	Car Park, Common Lane, St. Helier	Possible 7		Masonic Temple car park.
1/14 15170	Hue Street, St. Helier (vacant parking area)	Definite 20 Possible 10	P.P.	There was a P.P. for 22 flats in 1992, but the scheme was then delayed because Romeril's was unwilling to allow encroachment on its land. The land is currently the subject of an urban improvement scheme with a small housing content (possibly three dwellings).
1/19 5024	Animals' Shelter, St. Saviour's Road, St. Helier	Definite 56		**Abandoned.** Site being retained and redeveloped/upgraded by the Animals' Shelter.
1/20 4854	Maternity Hospital, St. Saviour's Road, St. Helier	Definite 44		Still being used by Health and Social Services. Presently under consideration for development with Woodville for housing.
1/21 2899	Used car sales site, St. Saviour's Road, St. Helier (Castle Cars)	Possible 8	P.P. (1989)	P.P. for mix of car sales and eight Category B housing units over.
1/22 4257	Norman Ltd. Box Factory, Le Breton Lane, St. Helier	Definite 18		Not pursued. The site is fully used for commercial purposes at present.
1/23 3723	Car park, Royal Crescent, Don Road, St. Helier	Definite 12	P.P. (1968)	P.P. for ten flats in 1968 and the I.D.C. later endorsed plans for 11 dwellings. Site currently a valuable commercial car park and acquisition attempts previously proved unsuccessful because of the owner's price tag.

Status of remaining Island Plan sites (continued)

Site Ref.	Site address	I.P. suggested yield	Current status	Notes
2/1 11908	Falle's Holdings, Bashford Nursery, Rue des Pres, St. Saviour	Definite 20		**Not pursued.** Former President of the I.D.C. gave an undertaking to Falles not to push for this site, at the time when land was made available for housing at the nursery. Recent planning approval for a commercial building.
2/3 8757	Beau Regard, Bagot, St. Saviour	Possible 9		Not pursued. This is a small site with limited potential and the owners have previously indicated they do not wish to sell (see 2/1).
3/1 2411	Mascot Coach Company, Georgetown Park Estate, St. Clement	Possible 6		In any event, a development would depend on finding an alternative site to relocate 20 or so coaches.
3/4 5356	Field 284, La Grande Route de la Côte, St. Clement	Possible 10		Not pursued. The owner is an unwilling seller.
3/5 7172	Glasshouses, La Lourderie, St. Clement	Definite 10 Possible 10		Not pursued. Glasshouses still in full use.
4/3 1014	Fernleigh, Gorey Village	Possible 10	DP	Not pursued. A past Review Board was unwilling to sanction compulsory purchase of the site for housing. The owner has previously stated his unwillingness for the site to be developed for Category A housing. Development permission has been granted in 1997 for five dwellings.
8/1 1782	Field 807a, La Ruette a la Pierre, St. Lawrence	Possible 12		There are property restrictions and vehicular access problems affecting this site. The I.D.C. has previously indicated it would accept a split of four Category A and two Category B houses. Attempts since to advance a scheme have proved unsuccessful.
11/1 5039	Field 1027, Beaumont, St. Peter	Possible 16		Excluded from the approved I.P. following opposition to the proposed Beaumont gyratory traffic system.
12/6 7232	Sacred Heart, Le Mont des Vaux, St. Brelade	Possible 13	PP	There is an outstanding permit for 14 dwellings.

Source: Department of Planning and Building Services

APPENDIX 8

Assessment of urban extension option for the development of social housing

Advantages		
Economic	**Social**	**Environmental**[50]
• relatively low infrastructure costs (where can use existing urban infrastructure); • good access to jobs; • maximum access to both urban centre and urban fringe activities; • relatively low land values; • require less effort and money to lever development; • less land assembly problems; • reduced requirement for States funding (i.e. to offset commercial values).	• able to exploit facilities of the town/urban area; • provides occupiers with improved amenities in respect of noise levels, air quality and open space; • accords with the housing expectations of many future occupants; • if large enough, a development can create its own identity and sense of community and incorporate its own community facilities; • there is less necessity for introducing housing types and tenures not associated with social housing as part of a development mix, because the town already comprises a broad based community.	• some opportunities to improve environmental quality on fringe sites; • visual impact on the surrounding area could be comparatively minimal, due to enclosure by existing development.
Disadvantages		
Economic	**Social**	**Environmental**
• does not allow for very high density housing and represents less economy in the use of land.	• can become sterile dormitory commuter estates on the edge of town; • can become monotonous single tenure, limited design environments; • can destroy existing sense of local identity and local community.	• must consume some green field land, although there will be sites which have previously been developed for horticultural and other purposes; • greater impact on the landscape than urban infill, but needn't be unduly intrusive, depending on the location; • is likely to involve some loss of agricultural land and natural habitat; • will encourage more travel, but distances from town could encourage the use of more energy efficient modes, as could proximity to public transport routes; • loss of open countryside; • will increase energy consumption through the use of more space heating; • militates against urban regeneration.

Source: Department of Planning and Building Services

Assessment of village extension option for the development of social housing

Advantages		
Economic	**Social**	**Environmental**[51]
• can help villages perform role of local service centres (where large enough and where there is already a range of facilities); • can help to maintain local economic base for the rural parishes; • comparatively low land values; • requires less effort and money to lever development; • can make use of spare capacity in roads and services already available in existing villages; • less land assembly problems; • reduced requirement for States funding (i.e. to offset commercial values).	• there will already be community facilities available and social networks in place to provide community focus; • newcomers might help to breathe new life into established communities; • development could serve to maintain the viability of existing services (e.g., local shops, pubs, bus routes and other features of community life), or allow for addition provision; • provides occupiers with improved amenities in respect of noise levels, air quality and open space; • accords with the housing expectations of many future occupants.	• there may be some opportunities to improve the environmental quality on the edge of settlements; • visual impact on the surrounding area could be comparatively minimal, due to enclosure by existing development.
Disadvantages		
Economic	**Social**	**Environmental**
• does not allow for very high density housing and represents less economy in the use of land.	• potential opposition from local residents against people moving into the area; • potential tension between newcomers and the established population.	• potential loss of green field sites, agricultural land and natural habitats (unless land is derelict or has previously been used for glasshouses); • greater impact on the landscape than urban infill option, but depends on location and other factors;[51] • will encourage more travel, although extent of impact would be offset by availability of local services and proximity to main public transport routes; • potential threat to the character of existing villages; • loss of open countryside; • will increase energy consumption through the use of more space heating; • militates against urban regeneration.

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[1] See Figure 4, page 29.

[2] See Figure 5, page 32.

[3] See Appendix 2, page 63.

[4] See Appendix 3, page 65.

[5] See Figure 12, page 45.

[6] See Figure 15, page 50.

[7] See Figure 13, page 47.

[8] See Figure 17, page 57.

[9] See Figure 13, page 47.

[10] Assuming that - (i) only the most likely sites considered suitable for social rented housing are developed; and (ii) private development schemes on sites considered suitable for first-time buyers make a 30 per cent contribution to that market.

[11] These definitions apply only to those with residential qualifications (i.e. they exclude those without qualifications as defined by the Housing Regulations, who are presently restricted to certain types of accommodation, such as lodging houses, or lodgers' accommodation).

[12] It should be born in mind that the average annual level of net immigration to the Island, between 1976 and 1991 (prior to the recession) was consistently in excess of 500 persons per annum. Indeed, between 1981 and 1986, net annual immigration averaged 820 persons, and this fell to 589 persons between 1986 and 1991. Although the last

census revealed that there had been ‘net emigration’ over the period 1991 due to the recession and the consequent exodus of unskilled, semi-skilled and transient labour, it is clear from recent manpower returns that immigration levels have risen significantly as the economy has recovered.

[13] The figures show that the number of people employed at the end of June 1998 has increased by over 3,600 since June 1996 to a record high of 47,997. Over two-thirds of the increase comprises persons engaged full-time (i.e. 2,489), with the remainder being persons engaged part-time (i.e. 1,152).

[14] The restricted availability of first-time buyer accommodation increases the pressure on the private rental sector, which in turn means that more people are forced to register on the States Rental Waiting List.

[15] See Appendix 2 (the Housing Committee will be using much of its void stock to re-house those families which are affected by its major refurbishment programme).

[16] A recent public questionnaire survey undertaken by the Housing Committee in June 1997 suggests that there might be approximately 100 persons per annum qualifying in 2000 and 2001, and that this will increase in 2002 and 2003. The indications are that approximately half of these expect to apply for States rental housing.

[17] In its Capital Programme (P.1/95), the Housing Committee indicated that a reasonable waiting list would be below 200 households, as this would effectively mean that waiting periods for all families in need would be under 12 months. However, it should be noted that the waiting list in recent years has never been as low as 200. In the circumstances, it could be argued that 250 households might be more indicative of a reasonable waiting list. This would reflect the low in waiting list numbers that was achieved at the end of 1996, and would reduce the estimated social rented housing requirements up to the end of 2003 from 1,140 to 1,090.

[18] The application procedure for the first-time buyer accommodation at the former Belle Vue Pleasure Park site, Les Quennevais lends added weight to the findings. There were some 250 eligible applicants for the 66 or so first-time buyer dwellings being offered for sale at Belle Vue, which makes no provision for single people.

[19] Based on the Housing Committee’s ‘First-Time Buyer Survey, 1997’ (N.B. this figure takes no account of the number of first-time buyers who have purchased property since January 1998).

[20] Of the 13,458 persons enumerated in the 20 - 29 age-band in the 1996 census, there were 712 heads of households who were owner-occupiers with or without a States loan. If this relationship is assumed to remain constant, of the projected 8,860 persons aged 20 - 29 in the year 2006 (i.e. under the ‘Nil Net Migration’ scenario), 469 households might be expected to be owner-occupiers who are not in that position at the present time. This would equate to 47 households per annum.

[21] A public questionnaire survey was undertaken by the Housing Committee in June 1997 of families who have lived in Jersey permanently from the mid-1980s and are awaiting their housing qualifications. The results suggest there might be an average of approximately 100 households qualifying annually from 2000 to 2004. The indications are that approximately half of these expect to apply for first-time buyer accommodation.

[22] It would be easier to tackle these problems if the States adopt the former Housing Committee’s proposals for all persons taking lodgers to register with the Housing Department.

[23] 123 of the 337 households registered as living in “other” accommodation include a qualified partner. The type of accommodation occupied by the remaining 214 households in the “other” category is not specified on the registration forms.

[24] These figures are based on an analysis of the number of such dwellings under construction at November 1998. It has been assumed that 85 per cent of the (a) - (j) developments will be complete in the next two years.

[25] The annual average net completion rate for demand housing (excluding purpose-built first-time buyer housing) has been estimated to be 150 dwellings per annum. This estimate has been arrived at, having regard to average completion rates for such housing over the past 12 years, the number of dwellings under construction at November 1998 and the likely reduction in demand arising from States’ policies aimed at reducing the population, giving high priority to social housing projects and giving low priority to other housing developments.

[26] The great majority of the accommodation released (54 per cent) by those obtaining residential qualifications through length of residence, will be private unregistered lodging accommodation and staff accommodation.

[27] Of the 173 Category B dwellings completed January and November 1998, 54 were unregistered units. Of the remaining 119 x 1(1)(a)-(j) dwellings completed, it has been assumed that 30 per cent will have had a direct impact on the requirements for first-time buyers. This assumption is based on the preliminary findings of a sample survey of sale applications received by the Housing Department between May and November 1998.

[28] Of the 599 Category B dwellings under construction at the start of November 1998, 134 were either lodging units, residential homes or units with no housing occupancy conditions (pre-1949 sites). Of the remaining 463 x 1(1)(a)-(j) dwellings under construction, it has been assumed that 85 per cent (394) will be completed in the next two years. It has also been assumed that approximately 30 per cent of these completions will have a direct impact on the requirements for first-time buyers in the next five years, based on the survey referred to in footnote 27.

[29] Of the estimated 150 Category B completions per annum from the year 2001 (referred to in Figure 9), it is assumed that the vast majority will be 1(1)(a)-(j) completions, given the new restrictions being imposed on other forms of housing development. It has also been assumed that 30 per cent of the completions will have a direct impact on the requirements for first-time buyers in the next five years.

[30] Based on the 35 per cent - 35 per cent - 30 per cent split for one, two and three-bedroom dwellings identified in the former Housing Committee’s Strategy Report, 1998-2003.

[31] Based on the 25 per cent - 35 per cent - 40 per cent split for one, two and three-bedroom dwellings identified by the former Housing Committee’s ‘Survey of Potential First-Time Buyers’, 1997.

[32] Based on an 85 per cent sample survey of dwellings under construction at November 1998. The split of one, two and three-bedroom dwellings under construction was found to be 38 per cent, 33 per cent and 29 per cent respectively.

[33] For the purposes of this exercise, a one-bedroom flat = two habitable rooms; a two-bedroom flat = three habitable rooms; a three-bedroom house = five habitable rooms and a four-bedroom house = six habitable rooms.

[34] It is assumed that, in urban areas, the average theoretical density for flats will range from 140 - 160 h.r.a., based on the recent developments at Keith Baal Gardens (formerly the Ritz Hotel) and Denis Ryan Court (formerly Cleveland Garage). The average theoretical density for family houses is assumed to be in the range 115 - 120 h.r.a., based on the recent successful development at Denis Ryan Court. It is recognised that this is not an absolutely ideal example development, given that it only includes a small number of town houses as part of a mixed scheme. It may be necessary in future, therefore, to revise the density range, as more examples of new town housing come forward. For its part, the Housing Department has previously indicated that it would not support the provision of dwellings for families with two or more children at densities higher than 80 h.r.a., which would require significantly more land.

[35] It is assumed that, in suburban areas, the average theoretical density for flats will range from 90 - 95 h.r.a., based on recently approved development proposals for one and two-bedroom flats at Belle Vue, St. Brelade. The assumed range for family houses is set at 65 - 80 h.r.a. Most of the larger housing developments constructed on the periphery of the built-up area during the last ten years have tended to be developed at around 65 h.r.a., although there are some notable exceptions, including Le Clos d’Avoine, St. Brelade (73h.r.a.).

[36] Using three years as an average lead-in time before dwellings can be completed, the land for most of the required dwellings would need to be secured during 1999 and the remainder in 2000.

[37] Completions not possible within this timeframe.

[38] It may be that the targets for 2000 will have to be carried forward into 2001, if there are delays in bringing forward sites.

[39] Includes allowance of ten per cent for slippage in building projects and in negotiations with owners.

[40] Numbers are continually being updated by 'Site Action Group'.

[41] Assuming that - (i) only the most likely sites considered suitable for social rented housing are developed; and (ii) private development schemes on sites considered suitable for first-time buyers make a 30 per cent contribution to that market.

[42] Excludes Group 5 applicants, but makes allowance for those households which are pending.

[43] The evidence available from the Rental Waiting List and the Tenants Transfer List cannot be used as an accurate indicator of likely social rented dwelling requirements up to 2003, not least because it takes no account of the current breakdown of stock, the changing nature of demand (including the increasing birth-rate), the impact of the Housing Committee's redevelopment programme of older high density family estates, and the possibility that a significant number of households waiting to qualify under the '20 year continuous residency rule' from the year 2000 have temporarily restricted the growth of their families until they can obtain regulated accommodation.

In its report entitled 'Housing Strategy Report, 1998-2003', the former Housing Committee states -

"*The short-term problem for the Housing Committee is clearly the provision of sufficient family-sized accommodation.*".

The report goes on to suggest that outstanding social rented dwelling requirements should be divided approximately into 30 per cent three-bedroom houses, 35 per cent two-bedroom dwellings and 35 per cent one-bedroom flats.

[44] Figures allow for persons who will qualify to rent accommodation from the year 2000 under the '20 year residency rule'.

[45] Figure allows for 53 temporarily unoccupied properties awaiting refurbishment (currently at Grasett Park and Le Geyt), which will arise on a continuous basis throughout the period up to 2003, as part of a rolling programme for refurbishing outworn estates.

[46] It is generally held that an acceptable waiting list would comprise 200 families and individuals.

[47] Based on the assumption that 30 per cent of private 'windfall' developments during this period will have a direct impact on requirements for first-time buyers.

[48] Net of permissions which have not been advanced for five years or more.

[49] To emerge from the work of the 'Site Action Group'.

[50] The effect of individual developments on the local environment would depend on a number of factors, including - (i) the environmental and agricultural quality of the land used; (ii) the quality of the development and whether it enhances or spoils what is already there; and (iii) the degree to which extensions require new infrastructure and community facilities (including roads, schools, shops, etc.).

[51] Environmental impact will be very much a question of fact and degree. It will depend to a large extent on exact site location; the existing use/status of the land; the nature of the surroundings; the size and type of development; its sensitivity to the existing pattern of development; the degree to which the new development plugs into existing facilities and services, etc.