

Digital Connectivity in Shetland

This is part of a [Series of Papers](#) providing information on Shetland's strategic challenges.

This paper provides information about Shetland's digital connectivity, drawing on national data but also key local insight and knowledge. It has been produced by a group of local experts.ⁱ

Digital connectivity has become essential to the way Shetland's economy, communities and public services operate. It enables remote and hybrid working, provides access to education and services and increasingly underpins how all businesses trade as well as health, social care, energy and other essential infrastructure. Good digital connectivity helps overcome disadvantages of geographical distance, but as activity becomes increasingly dependent on digital networks, the consequences of slow, unreliable or disrupted connectivity become even greater. **Digital connectivity is both an opportunity and a vulnerability.**

Shetland has experienced substantial progress in digital connectivity over the last 15 years, through a combination of local, Scottish, UK, European and commercial investment. However, the position varies considerably between communities. The coverage statistics provided by Ofcom and the operators can be misleading and not reflect the experience on the ground.

This Paper will predominantly focus on the two main forms of digital connectivity – fixed broadband and mobile connectivity. It sets out the data and evidence of the situation and strategic challenges, alongside efforts being made by local organisations, in partnership with regional, national and international players.

1. Current Situation

Ensuring the wide availability of next generation broadband and mobile connectivity has been a priority for successive UK and Scottish governments. However, both broadband and mobile telecommunications networks in the UK are operated by private companies.ⁱⁱ Private telecom operators take decisions about where and when to deliver services based primarily on commercial considerations, albeit this may be enabled by public investment in infrastructure.

In areas like Shetland, the main barrier to delivering digital connectivity is the nature of our relatively small and dispersed populations. This requires considerably more investment per head than urbanised populations, presenting challenges for any business case for investment. Remote communities like Shetland will therefore remain excluded from most commercial rollouts and will be reliant on publicly subsidised schemes to achieve connections.

Shetland has benefited from multiple national funding programmes to date – including R100, 4G Infill, Shared Rural Networksⁱⁱⁱ and proposed investment through Project Gigabit – but the Council and local partners have also been proactive in establishing and investing in local solutions. With an investment of around £1.5million (including £400k from the European Regional Development Fund) Shetland Islands Council established the **Shetland Telecom** project in 2009, and now operates an open-access network, using a resilient fibre optic ring which connects to the Faroese owned SHEFA2 subsea cable at two points. This is **key locally owned infrastructure** that has helped facilitate many other connectivity projects, including the North Isles Fibre Project. However, it is unlikely that any further substantial investment in fibre networks, either from local or national governments, will be made in the near future.^{iv}

Superfast broadband (SFBB) has been the principal target of UK and Scottish broadband policy over the last decade and refers to connections capable of delivering download speeds of at least 30 Megabits per second (Mbps). This speed is currently regarded as sufficient for most day-to-day online activities such as video streaming, remote working and online services.^v However, there is now an **increasing emphasis on Ultrafast Broadband (UFBB)**, referring to services capable of delivering at least 100Mbps and Gigabit-Capable Broadband which refers to networks capable of delivering speeds of around 1 Gigabit per second (1,000 Mbps).

Gigabit-Capable Broadband is generally delivered through full-fibre networks and are regarded as the next generation of fixed broadband infrastructure. The long-term objective is to replace legacy copper infrastructure with full-fibre networks wherever practical.

When referring to **mobile connectivity**, this is now **predominantly delivered through 4G and 5G networks** and it allows phones and other devices to access the internet. It is particularly important where fixed broadband is not



available or is inadequate, but its performance depends on signal strength, network capacity, the number and location of masts and the fibre or other backhaul^{vi} connecting those masts to the wider network. This distinction is important because **coverage is not the same as performance.**^{vii}

The UK's 3G networks have already been retired with 2G services due to be withdrawn between 2029 and 2033.

Low orbit satellite technologies are separate from both fixed broadband and mobile connectivity. Some providers have recently become price-competitive with conventional broadband products, so much so that Ofcom have significantly reduced the number of premises they classify as without access to “affordable decent broadband.” Ofcom now estimate that there are around 4,000 premises in the UK that lack access to affordable decent broadband, while 39,000 still lacked decent broadband from fixed-line or fixed-wireless networks.^{viii}

According to the data contained within Ofcom's Connected Nations Update in Spring 2026^{xi}, **Shetland continues to significantly lag behind** the Scottish average in terms of access to superfast broadband.^{xii} Around 12.4% of Shetland premises remain unable to receive 30Mbps services, more than four times the national average.

Indicator	Scotland	Shetland	Orkney	Na h-Eileanan Siar
SFBB availability	96.7%	87.0%	86.7%	80.1%
Full Fibre availability	74.0%	20.0%	30.0%	12.0%
Gigabit availability	82.1% ^{ix}	20.0%	30.0%	12.0%
Unable to receive 30 Mbps	2.9%	12.4%	11.7%	12.2%
Unable to receive decent broadband ^x	0.3%	1.7%	2%	2.8%

Shetland also remains significantly behind Scotland in terms of the availability of full fibre and gigabit-capable connections. Only 20% of Shetland premises can currently access full-fibre and gigabit capable broadband, whereas Orkney is currently at 30%.

Fibre availability remains limited in some remote parts of Shetland and in these communities, 4G often acts as a substitute broadband platform for household and business connections.

However, **mobile phone coverage data presented by Ofcom should be interpreted with some caution.** Coverage estimates are primarily based on modelled signal-strength predictions supplied by mobile network operators rather than direct measurements of user experience.^{xiii}

Shetland currently has 92.9% predicted geographic 4G coverage from all four mobile operators (compared to 98.5% in Scotland) and 58.2% predicted indoor 4G coverage from all four mobile operators. If statistics are presented for just one operator, the coverage statistics are higher at 99.2% but in the context of discussing resilience, consumer choice, and the likelihood of communication remaining possible if one network fails, data from all four operators is presented for Voice and 4G.

Measure	Scotland ^{xiv}	Shetland	Orkney	Na h-Eileanan Siar
4G (outdoor premises, all 4 operators)	98.5%	92.9%	95.8%	91.5%
4G and Voice (Indoor premises, all 4 operators)	88%	58.2%	74.7%	69.4%
Voice (outdoor premises, 4 operators)	98.7%	93.4%	96.1%	92.5%
5G High Confidence (≥1 operator, premises)	91.7%	54.4%	77.6%	31.6%
5G Very High Confidence (≥1 operator, premises)	83.9%	41.0%	64.4%	22.7%

Shetland performs reasonably well on outdoor 4G coverage and geographic coverage and is broadly similar to other island areas in terms of 4G. However, Shetland's indoor usability is considerably less than Orkney and the Western Isles at 58.2% compared to 74.7% in Orkney and 69.4% in Na h-Eileanan Siar.^{xv}

If we incorporate 5G to the analysis, Shetland's position is substantially weaker than Scotland overall and is lagging Orkney too. Only 54.4% of Shetland premises have high confidence 5G coverage compared to 77.6% in Orkney. So, like broadband, **there is an emerging gap in the deployment of next-generation mobile infrastructure.**

Ofcom data indicates a relatively extensive coverage, especially for 4G. However, real-world performance data paints a more challenging picture. Actual performance measures such as download speeds capture something that coverage statistics cannot. Ookla's 2025 analysis of mobile network performance across the UK local authorities identified Shetland as one of the **weakest performing authorities in the UK for mobile broadband speeds.**^{xvi}



Shetland's median mobile download speed of 19.4Mbps is the lowest recorded among Scotland's 32 local authority areas.^{xvii} Scotland's average was calculated at 51.2 Mbps with Scotland's highest rates in Glasgow at 128.6Mbps, which is 6.6 times Shetland's speed. The urban-rural digital divide persists and the gap between the best and worst performing local authorities remains significant. There is no discounted price for receiving a poorer service either.

The Faroe Islands provide an interesting comparator for Shetland. Despite a similarly dispersed island geography and small population, the Faroes have developed extensive high-speed fibre and mobile networks. Independent speed-test data for 2025–26 indicates average mobile download speeds of 136 Mbps and average fixed broadband download speeds of 75 Mbps, while two major operators offer fibre services of up to 1 Gbps.^{xviii} In Faroe, the national telecommunications network and subsea cable infrastructure is managed by publicly owned enterprises.

Mobile connectivity coverage remains a significant challenge for remote areas of Shetland. This should not be underestimated by official coverage/mapping figures, which do not reflect the reality as experienced by local residents.^{xix} Shetland continues to have many “not spots”, including in areas where figures indicate coverage.^{xx} Coverage data also does not cover where there is congestion on individual sites or network backhaul problems.

While Shetland has benefited from expanded 4G coverage through initiatives such as the Scottish 4G Infill programme and the Shared Rural Network, coverage remains uneven. **Despite recent investment, large parts of Shetland continue to be classified as mobile partial not-spots**, where 4G service is available from at least one but not all operators. Local evidence suggests that residents in areas including Northmavine, the Westside, Whalsay, the North Isles and other remote areas continue to experience unreliable mobile connectivity and coverage limitations.^{xxi} The lack of useable and reliable 4G service has also been notable in Lerwick,^{xxii} with some claiming it as particularly problematic when large influxes of cruise ship passengers are present. Walls is one of Shetland's remote communities that has benefited from SRN, a £1billion joint initiative between the UK's mobile network operators and the UK Government.^{xxiii} However, **even after planned upgrades by SRN to 2027, it is estimated that 32% of Shetland could remain with only partial coverage rather than full multi-operator signal.**^{xxiv}

In terms of broadband, Shetland has benefited from a range of public interventions to date, but not all national schemes have translated effectively to the remote island context. Broadband voucher schemes were of limited value because the cost of providing a connection could far exceed the level of support available and in many cases, an insufficient backhaul to connect new services.

The Scottish Government has continued to support digital infrastructure delivery in Shetland through the Reaching 100% (R100) programme, and the procurement of new contracts through Project Gigabit. However, **only 20% of Shetland properties currently have access to full fibre (compared to 74% in Scotland as a whole).** The R100 programme was expected to reach around 2,400 premises in Shetland and by July 2026, over 2,200 premises had been connected, with a further 43 premises supported through the Scottish Broadband Voucher scheme.^{xxv} The Scottish Government states that 16 subsea cables were laid in 2022 under R100, to deliver broadband to island communities. This includes Fair Isle, which has been connected via a spur from a 68-mile subsea cable between Shetland and Orkney. While the R100 programme has delivered new subsea fibre infrastructure serving island communities, the resilience benefits of this additional infrastructure are not yet being fully realised for Shetland, with only the Fair Isle spur currently understood to be in active use. Openreach based wholesale networks are still dependent on SHEFA-2.

In December 2024, the Scottish Government launched a £40.7 million regional Project Gigabit procurement aimed at enhancing connectivity in Orkney and Shetland, where more than 13,500 premises are eligible to be connected (an investment of approximately £3000 per premises).^{xxvi} The outcome of Project Gigabit Lot 6 procurement was expected in Spring 2026, but is now delayed until the end of the year.^{xxvii} The projected build phase is end of 2030, but final coverage and funding figures will depend on what the chosen supplier deems viable within the budget.^{xxviii}

Shetland will continue to rely heavily on national government investments such as R100 and Project Gigabit to improve overall levels of connectivity. However, this reliance on public intervention generally results in **longer delivery times** and so there is the recurring risk that technology and demand move on, creating a new performance gap for the state of Shetland's digital connectivity.

With all publicly subsidised schemes to date, the experience of remoter communities is that the **hardest to reach properties are dealt with last - an “inside out” model of delivery** where easier to reach properties are connected



first. Project Gigabit is intended to reach premises that are not expected to be reached through commercial investment, but it remains unclear whether it will reach the hardest to connect premises in Shetland or what gap will remain after the investment.

2. Resilience and Critical Infrastructure

Resilience is a separate challenge and needs to be treated as a distinct issue from the current levels of connectivity.

Shetland's digital infrastructure has **vulnerabilities because of its dependence on subsea fibre-optic cables**. These cables exist in a particularly active and challenging marine environment, where repairs are expensive to undertake, can take weeks to implement and are reliant on favourable weather windows. Recent subsea cable outages in 2025 caused significant disruption for several weeks at a time, exposing uneven resilience between internet service providers (ISPs) and difficulties faced by households, businesses^{xxxix} and public services when reliable connectivity and mobile data backup are unavailable. Recent repairs to SHEFA-2 have reportedly cost between £400,000 and £800,000, illustrating the significant costs associated with restoring island connectivity following cable failures.^{xxx}

Shetland's subsea network traffic predominantly travels south on the SHEFA2 cable, but when cables are damaged or undergoing routine maintenance, traffic is rerouted northwards to Faroe, thus avoiding a single point of failure. However, nearly 3000 broadband customers^{xxxi} were severely impacted by prolonged loss of service caused by two cable outages in July and October 2025. This was the result of **only some ISPs paying for this additional resilience and rerouting ability**.^{xxxii}

In evidence provided to a Scottish Affairs Committee Enquiry, ISPs cited mobile data packages and portable WIFI devices as mitigation measures. However, community evidence suggested that these were not a reliable substitute for fixed broadband, particularly where mobile coverage and network capacity were already constrained. During the evidence, VodafoneThree indicated that there was now a second subsea connection serving Shetland for resilience purposes,^{xxxiii} although it would appear they referenced the BT cable that at the time of writing is not yet fully operational.^{xxxiv} Separately from this, VodafoneThree announced in June 2025 that it was exploring the feasibility of a further new subsea cable between mainland Scotland and Shetland.^{xxxv}

2.1 Interdependencies between fixed broadband, mobile connectivity and electricity infrastructure

In discussing digital resilience, there are important interdependencies between fixed broadband, mobile connectivity and electricity infrastructure. Mobile masts often depend on fibre backhaul; telecommunications depend on electricity; and repairs depend on physical access, transport and specialist equipment. Even brief power outages can trigger much longer disruptions to digital connectivity and business operations, as recently experienced by Tesco.^{xxxvi}

During severe weather or cable outages, several systems will be affected simultaneously. For example, in Whalsay, power outages in 2025 were accompanied by disruptions to both broadband and mobile services, leaving residents without any means of communication and prompting **concerns about community safety and access to emergency assistance**.^{xxxvii}

In 2022, two major incidents exposed the vulnerability of Shetland's telecommunications infrastructure. In October, the SHEFA-2 cable was damaged in two different segments simultaneously, removing the ability to reroute Shetland's telecommunications traffic north to Faroe, disrupting broadband, mobile networks and some 999 services and prompting Police Scotland to declare a major incident. Businesses, public services and payment systems were significantly affected, including services delivered by the Council and NHS.^{xxxviii} Full repairs were completed within a week, aided by the presence of the repair vessel already being in the area. The situation was mitigated because the SHEFA-2 south cable was only partially severed, allowing a temporary solution to be implemented by boosting signal strength through the undamaged fibres. Had both cables been fully severed at the same time, the resulting outage would have been significantly more prolonged – for all ISPs, including Shetland Telecom customers.

Three months later, severe snow and ice damaged the electricity network with around 5,289 homes and businesses losing power, many up to six days.^{xxxix} During the incident, a major concern was the ability of people to communicate and access services. BT engineers were involved in the response alongside SSEN and other agencies.^{xl}

Together, these incidents highlight the importance of resilient digital connectivity and retaining backup communications infrastructure to support emergency response, service delivery and community resilience during major disruptions. The subsea cable outage also exposed a vulnerability of Shetland's reliance on the SHEFA-2 route,



which remains the primary path for Openreach traffic serving the islands too. In contrast to Shetland, Faroe benefits from multiple subsea connections with access routes to UK, Iceland, Denmark and Germany. Faroe are progressing plans for an additional connection to further strengthen resilience.

The importance of digital resilience is increasing as the UK's traditional analogue telephone network services are being withdrawn. The UK's Public Switched Telephone Network (PSTN) is scheduled to be fully retired by January 2027, with all voice services (including telecare systems) migrating to broadband based digital platforms.^{xli} This therefore increases dependence on broadband networks, local power supplies and associated equipment.

While traditional analogue lines often continued to work during a local power cut, this will no longer be the case. Resilient digital connectivity is increasingly a matter of community safety, inclusion and economic resilience.

Solutions using 4G Low-Orbit (LEO) and 4G Direct to Cell connectivity can offer a lifeline communication service for rural areas that have the hardest to reach premises and little to no mobile phone coverage, but they too are dependent on electricity. Ofcom are increasingly recognising the interdependency between telecommunications and the electricity network, including examining how much battery back-up and standby power mobile operators should provide at mobile mast sites.^{xlii} Ofcom has identified satellite technologies as a potential contributor to future network resilience^{xliii} but evidence submitted to the Scottish Affairs Committee suggests that satellite services are most effective when deployed as part of a broader resilience strategy, rather than as a replacement for robust terrestrial infrastructure.^{xliv} As such, long term digital resilience in Shetland is likely to depend on a balanced mix of fibre, mobile, satellite and subsea connectivity solutions rather than reliance on any single technology.^{xlv}

3. Inequalities and Wider Impacts on the Economy and Communities

As outlined in HIE's Rural and Regional Disadvantage research, remoteness creates structural disadvantages which can be compounded where infrastructure and services are weaker. Digital connectivity can mitigate some of these disadvantages, but unequal connectivity can also reinforce them.^{xlvi}

Although connectivity has improved significantly across Shetland, service quality still varies considerably between locations creating geographic inequality. While some households and businesses have access to full fibre services and strong mobile coverage, others continue to experience slower speeds, intermittent coverage or greater vulnerability to outages. People living in the areas with the greatest digital connectivity challenges can simultaneously face higher transport costs and longer journeys to access work opportunities, education or services.

The Making Shetland Fairer OPEN peer research with young people highlighted digital access as one of the four main sources of inequality in Shetland. Participants highlighted poor connectivity, limited mobile signal and gaps in service provision as significant barriers. These issues affected their ability to stay in touch with friends and carers, and young people raised concerns when internet or phone connections were unavailable.^{xlvii}

Good digital connectivity can contribute positively to many of Shetland's wider strategic objectives.

Economy - Connectivity is an economic opportunity and can help businesses overcome geographical distance. It makes remote and hybrid working more viable, it can improve productivity, provide access to external markets and **support new forms of enterprise**. In the Shetland Place Standard 2025 consultation, improving infrastructure - including digital access - was a key suggestion for improvement, with participants identifying this as an important enabler of economic opportunity and employment.^{xlviii} While 24.3% of Shetland residents mainly work from home, this compares to the Scottish average of 31.2%.^{xlix}

Population - Digital connectivity can also support population retention, reducing one of the disadvantages of geographical isolation. It can **make it easier for people to live in Shetland** while working for organisations elsewhere and help businesses recruit and retain people who value island living.

Communities and services - Connectivity **can improve access to education, healthcare, telecare and public services**, while enabling people to maintain social connections. Ofcom has highlighted that people who face barriers or difficulties when online can experience "poorer mental and physical health, miss out on work opportunities and become socially excluded". **As services increasingly move online, digital connectivity is becoming a prerequisite for full participation in modern society.**^l Our islands healthcare is increasingly using remote monitoring and virtual models of care including the recently launched Project Sound, which is introducing point-of-care diagnostic



technology for paramedics in Shetland and Orkney.^{li} Shetland has also been investing in schools and improving digital access for young people, helping ensure that children have a more equitable learning experience regardless of where they live. Digital connectivity should be viewed as part of the wider challenge of ensuring fair access to opportunities and services across all of Shetland.

Digital transformation can create new forms of inequality where access, reliability, affordability or resilience differ between communities and between households. The 2025 cable outages demonstrated that **resilience itself can become a source of inequality**. Many customers choose providers based on price, promotional offers or bundled services and in many cases, it was ISPs offering cheaper prices or “deals” that were discovered as not having commercial agreements to reroute. For customers of Sky, Talk Talk, Vodafone and Utility Warehouse, their digital resilience was effectively determined by commercial arrangements that were largely invisible to consumers at the point of purchase. These same customers then had to spend considerable time pursuing compensation, challenging decisions (despite their providers being members Ofcom’s automatic compensation scheme)^{lii} and experiencing more frustration when the “one touch switch” process largely failed for customers trying to move to more resilient providers during the outage.^{liii} Therefore, **the financial and administrative burden of prolonged outages was not borne equally across the community**.

To date, satellite technologies for household connectivity have been a higher cost solution than commercial fibre products, potentially exacerbating inequalities with only higher cost service options being available in the hardest to reach communities. During 2026, these options have become increasingly price competitive and more satellite providers are expected to enter the market over the coming years.

The withdrawal of 2G services, due between 2029 and 2033, will not affect all users equally and will reduce phone signal strengths in many parts of Shetland.^{liv} Older devices, some medical pendants (telecare alarms), lift alarms and fire alarms^{lv} and other connected equipment may require replacement, potentially creating additional costs and disruption for some households. Ofcom has recognised that vulnerable customers may require additional support during the transition. In remote and island communities, where mobile connectivity may already be uneven, ensuring that replacement services provide equivalent coverage and reliability will be important to avoid creating new forms of digital disadvantage.^{lvi}

As analogue services are withdrawn and public services become increasingly digital, the consequences of losing connectivity become greater. The result is that **connectivity outages** no longer represent merely a temporary inconvenience but can **affect participation in society** and access to essential services.^{lvii} Climate change is likely to increase the risk of disruption to digital connectivity through more frequent and severe extreme weather events. This will place greater importance on the resilience of digital infrastructure, including subsea cables, mobile networks and supporting power systems, to ensure continued access to essential services, communications and economic activity.

Following consultation with households, businesses and voluntary organisations across Shetland, **the Shetland Community Benefit Fund identified “better broadband and/or mobile phone connections” as one of six key priorities** for the first five years of the Viking Community Fund,^{lviii} with an indicative annual allocation of £200,000. However, the fund acknowledges that connectivity is a complex issue and initially anticipated that investment would focus on research, development and partnership-building, rather than immediate infrastructure projects.

To date, no projects have come forward, which is probably a reflection of the complexity of commercial arrangements that underpin digital connectivity, including the sharing of infrastructure and equipment. As resilience needs to be given equal weight to coverage, supporting measures that strengthen community resilience may represent a more practical area of focus for the community benefit fund. In the event of a major power outage, **equipping key community hubs with both backup generators and satellite connectivity could significantly boost community resilience** and help communities maintain access to information, emergency services, welfare support and coordination functions when conventional telecommunications networks are severely disrupted.

4. Current Responses and Emerging Opportunities

Shetland does not control all the levers that determine digital connectivity. UK and Scottish Government programmes, Ofcom guidance and regulation, commercial investment decisions, mobile network coverage and infrastructure owners all influence outcomes for our communities.



Discussions at a Shetland connectivity summit in November 2025 highlighted how many of the key decisions affecting connectivity in Shetland are made beyond the islands themselves. Faroese Telecom confirmed that there was capacity on the SHEFA2 cable to Faroe to improve resilience for all ISPs, but implementation was **dependent on commercial decisions by providers**. Forum participants also heard that the current legislative, regulatory and market frameworks do not always provide sufficient incentives for providers to invest in the levels of resilience required by remote island communities.^{lix} There is no legal requirement for commercial operators to ensure that redundancy and resilience are built into their business operations for service continuity purposes.

Digital connectivity is now critical infrastructure and yet much of this infrastructure is ultimately dependent on private sector investment and commercial arrangements. Ownership and operation of infrastructure is also often subject to complex commercial arrangements and supply chains, which can complicate both the communication of an incident and restoration of services when equipment fails or is damaged. Growing geopolitical tensions have increased concerns about the security of critical subsea communications infrastructure, so Shetland's dependence on a limited number of subsea telecommunications links should be considered within a wider national context.^{lx}

However, **Shetland has exercised more local influence than most rural and island areas through Shetland Telecom and locally led infrastructure initiatives.**

The Shetland Telecom project created a fibre optic network running from Sumburgh in the south to Graven in North Mainland, providing resilient high-capacity infrastructure available for public services, businesses and other providers.^{lxi} This **infrastructure has enabled community broadband projects** in places like Vidlin, Fetlar and West Burrafirth to progress, using locally tailored wireless broadband solutions using connectivity provided through the Council owned network.^{lxii} The existence of this infrastructure also helped secure £1.91 million^{lxiii} through the UK Government's Local Full Fibre Networks programme to address significant connectivity challenges in Yell and Unst, connecting 21 public sector sites including schools, health centres, care homes, council depots and ferry terminals, while also supporting strategically important industries such as SaxaVord Spaceport. It was recently highlighted as a [case study](#) by the UK government's Department for Science, Innovation & Technology.^{lxiv} The North Isles project used spare fibre capacity within SSEN's subsea electricity cable to deliver "high capacity resilient connectivity" for Yell and Unst, avoiding the cost of installing separate subsea telecommunications infrastructure while simultaneously improving SSE's operational capability too.^{lxv} Projects like these demonstrate the value of strong local strategic leadership, infrastructure ownership and effective partnership working for unlocking investment and enabling development to address connectivity challenges.^{lxvi}

However, there are **significant regulatory and legal complexities** for infrastructure sharing, compounded by the fact that energy and telecommunications networks are overseen by different regulators (Ofgem and Ofcom). The UK's review of the Access to Infrastructure Regulations specifically identified wayleaves^{lxvii} as a major barrier to infrastructure sharing. Existing agreements between utilities and landowners can restrict sharing or the use of infrastructure for the purposes other than the original one. A telecoms operator may therefore need a separate agreement even when the infrastructure is already physically available.^{lxviii} However, the North Isles project demonstrates that these challenges are not insurmountable.

As further subsea telecommunications and energy infrastructure is developed in the North Atlantic, it may be possible for Shetland to identify further opportunities for new connections, build additional resilience and generate wider economic benefit.

In the **Scottish Government's Programme for Government 2026-2031**, there is a commitment to initiate a feasibility study to identify and evaluate potential options for a new subsea cable between Shetland and mainland Scotland, with the aim of increasing network resilience and reducing vulnerability to service disruption.^{lxix}

While this is welcome news, Shetland's original investment in Shetland Telecom also demonstrates the value of acting strategically with international partners and subsea infrastructure. Additional cables for Faroe, Iceland and Greenland are in the planning stages. It is also assumed that the existing R100 investment in subsea fibre infrastructure will eventually improve Shetland's overall resilience, as well as providing vital connectivity to Fair Isle.

As outlined in the [Economy Evidence Paper](#), there are currently 18 strategic energy projects in the pipeline, including a potential second HVDC link to mainland Scotland. The existing HVDC link already incorporates a fibre-optic telecommunications cable alongside the electricity cables, but this is primarily to support control, monitoring



and communications from the transmission system. International interconnector projects demonstrate that spare fibre-optic capacity can be installed alongside electricity infrastructure to provide telecommunications services.^{lxx}

The Scottish Government's emerging Infrastructure Strategy explicitly promotes making better use of existing assets and recognises telecommunications as a core element of national infrastructure alongside transport, energy and water. The strategy highlights both the importance of longer-term planning for remote and island communities and the growing need to build resilience to climate impacts, reinforcing the importance of digital connectivity as a strategic infrastructure asset.^{lxxi} The SSE partnership for the North Isles Fibre project demonstrates the **wider infrastructure benefits** that digital connectivity can provide.

Improved digital resilience and capacity could create new economic opportunities for Shetland. Data centres have been considered in the islands for more than 15 years, including proposals for Lerwick and the former Scatsta Airport. Shetland's potential advantages include available land, a cool climate which reduces cooling requirements, access to renewable energy and opportunities to utilise waste heat. Smaller modular facilities, such as cloud or secure data storage centres, may be more realistic than large-scale developments. However, the resilience of external connectivity remains a significant constraint, with recent subsea cable failures potentially undermining confidence in Shetland as a location for data-dependent investment. Greater redundancy and capacity through additional subsea connections could therefore do more than improve resilience for existing users: it could help enable new digital industries and support the increasingly data dependent energy sector and the wider economy.^{lxxii}

Appendix: Current Strategic Document Reference to Digital Connectivity

A Co-Pilot Search across Shetland's key strategic documents showed the following strategic documents containing **explicit references to digital connectivity** as well as significant references to connectivity, digital services or digital resilience.

Directly focused on digital connectivity

- **Shetland Islands Council Corporate Plan 2021–2026:** digital connectivity is identified as a specific strategic priority. The Plan explicitly seeks to improve digital infrastructure to support communities, businesses and public services, particularly in remote and underserved areas

Significant references to digital connectivity, digital services or digital resilience

- **NHS Shetland Strategic Plan 2024–2029:** The Plan identifies "embracing digital technology and new ways of working" as part of creating a sustainable and resilient healthcare system. Digital technology is presented as an enabler of service sustainability, accessibility and modern service delivery.
- **Health & Social Care Strategic Plan 2025–2028:** One of the Plan's supporting goals is to "make good use of technology and innovations to support progress." This positions digital technology as a key enabler of community-based, accessible and sustainable health and care services.
- **Shetland Local Development Plan:** The Plan includes communications infrastructure as part of its development framework, alongside housing, transport and community facilities. It recognises communications infrastructure as an important component of sustainable development and economic growth.
- **Shetland Community Learning and Development Plan 2024–2027:** Although digital connectivity is not highlighted as a standalone priority, the Plan focuses on reducing inequalities, participation and improving life chances. These themes align strongly with digital inclusion objectives and could be referenced in relation to digital exclusion and access to services.
- **NHS Scotland Ambulance Service Strategy ("Our 2030 Strategy"):** The strategy includes a priority to embed digital, data, research and innovation within service delivery and highlights the importance of supporting remote, rural and island communities through innovative service models.
- **Skills Development Scotland Strategic Plan 2022–2027:** Identifies digital skills alongside green skills as a strategic priority, recognising the importance of digital capability for workforce development and economic resilience.

Secondary references

- **HIE Strategy 2023–2028:** focuses on economic resilience, innovation, skills, business competitiveness and supporting rural communities. These are all areas where digital connectivity is commonly recognised as an enabler.
- **UHI Shetland Strategy 2030:** Focuses on learning, research, innovation and enterprise. The successful delivery of these ambitions in an island context is clearly dependent on effective digital infrastructure.



End Notes

- ⁱ Depute Director of Development and Infrastructure, Project Manager Shetland Telecom and Community Planning Team (Shetland Islands Council)
- ⁱⁱ Clark, A. (2026) Building broadband and mobile infrastructure. House of Commons Library Research Briefing, 5 June 2026. Available at: <https://commonslibrary.parliament.uk/research-briefings/cbp-9156/> (Accessed: August 2026)
- ⁱⁱⁱ Prior to the Shared Rural Network (SRN)ⁱⁱⁱ programme, operators largely build mobile phone networks independently, but government funding has incentivised operators to share coverage improvements, so customers of all networks benefit from investment rather than only customers of one operator.
- ^{iv} Depute Director of Development and Infrastructure
- ^v The older fibre-to-cabinet (FTTC) technology, that still uses the existing copper telephone network, can delivery superfast broadband speeds but is generally less reliable, particularly over longer distances. Full-fibre (FTTP) connections run all the way to premises and is the technology that provides the highest levels of performance.
- ^{vi} Backhaul is the infrastructure that connects mobile masts to the wider telecommunications network and internet, usually via fibre-optic cables. The quality and capacity of these connections influence network performance, meaning good signal coverage does not necessarily guarantee fast or reliable service.
- ^{vii} Backhaul limitations occur when local cell towers lack high-capacity fibre or microwave links to handle heavy traffic, meaning signal reaches your phone but the tower cannot push data back to the internet. Mast congestion occurs with tourist influxes, local user spikes or when heavy background device syncing overloads limited network capacity.
- ^{viii} Ofcom (2026) Connected Nations update: Spring 2026. Published 13 May 2026. Available at: <https://www.ofcom.org.uk/phones-and-broadband/coverage-and-speeds/connected-nations-update-spring-2026> (Accessed: August 2026).
- ^{ix} In Ofcom data, gigabit-capable broadband is a broader category than full fibre, so it is entirely normal for the gigabit percentage to be higher. Full fibre (FTTP) means fibre runs all the way to the premises. Gigabit-capable includes: Full fibre (FTTP), plus Upgraded cable networks capable of delivering gigabit speeds (historically Virgin Media's DOCSIS 3.1 network and similar technologies). Ofcom (2023) *Gigabit broadband reaches one in four homes*. Published 17 December 2020, last updated 17 August 2023. Available at: <https://www.ofcom.org.uk/phones-and-broadband/telecoms-infrastructure/gigabit-broadband-reaches-one-in-four-homes> (Accessed: August 2026)
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- ^{xii} This table uses premise-weighted averages across all Scottish local authorities.
- ^{xiii} While Ofcom undertakes validation through drive testing and other assessment activities, coverage predictions can be subject to local inaccuracies arising from factors such as topography, buildings, network congestion and handset characteristics. See Ofcom (2025) Map Your Mobile coverage checker: methodology. August 2025. Available at: <https://www.ofcom.org.uk/siteassets/resources/documents/phones-telecoms-and-internet/comparing-service-quality/2025/map-your-mobile-2025-threshold-methodology.pdf> (Accessed: August 2026) and Ofcom (2026) Mobile Coverage Mapping: Freedom of Information response, 7 May 2026. Available at: <https://www.ofcom.org.uk/siteassets/resources/documents/about-ofcom/foi/2026/may/mobile-coverage-mapping.pdf> (Accessed: August 2026)
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- ^{xix} Shetland Islands Council (2026) *Written evidence submitted by Shetland Islands Council (CISDC0036)*. Scottish Affairs Committee inquiry: Connectivity and Scotland's digital communities. 5 January 2026. Available at: <https://committees.parliament.uk/writtenevidence/160902/pdf/> (Accessed: August 2026).
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- ^{xxxii} At the time of the 2025 outages, Shetland Telecom and the ISPs linked to BT Wholesale continued to operate – BT, EE and Plusnet.
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