

Shetland Partnership Plan Development Process

Session 4 | Wednesday 7th October 2026 | Mareel, Lerwick

About This Session

Session 4 of the Shetland Partnership Plan development process took place on Wednesday 7th October 2026 at Mareel, Lerwick. The Session was also open to online attendees. In total, 45 people attended in person and 13 joined online, representing 35 organisations. Participants were drawn from across Shetland's statutory organisations, Community Councils, Community Development Organisations and third sector bodies. Representation was from across the islands.

The theme of the Session was **Transport, Housing and Digital Connectivity in Shetland**, the third of the thematic Sessions in the process.

What Happened on the Day

The Session was structured across five parts. It opened with a short introduction from the Session Chair, **Gary Robinson**, who reflected on the interconnected nature of the challenges facing Shetland and the need for collective action through the Partnership Plan. He explained that the Session would focus on three key enablers of sustainable communities: housing, transport and digital connectivity.

Katrina Wiseman, Area Manager for Orkney and Shetland at Highlands and Islands Enterprise, then summarised the story so far. She drew together the main themes from the earlier Sessions: that Shetland's long-term future depends on a sustainable population, economy and communities; that the issues cannot be addressed in isolation; that disadvantage is often cumulative and not always visible; and, importantly, that no single organisation can deliver the changes required alone.

The main input was an evidence presentation from **Jo Robinson**, Director of Community Health and Social Care and Chief Officer of the Shetland Health and Care Partnership. Drawing on three detailed evidence papers, it considered housing, transport and digital connectivity together as infrastructure which affects whether people can live and work in Shetland, access services, stay connected and live independently.

Participants then moved into facilitated groups, including an online group, to discuss what had surprised, concerned or encouraged them about the evidence, what felt important for their organisation or community, the biggest risks and challenges for Shetland, and what could happen if nothing changes. Each group provided a headline point in a short feedback session to the room.

Matt Mason, Group Commander for the Scottish Fire and Rescue Service, then revisited the three hypothetical future scenarios introduced in Session 3: "*incremental decline*", "*mixed bag*" and "*thriving and resilient*". He focused on the thriving and resilient scenario, outlined work already under way and asked whether national decisions affecting Shetland are being properly island-proofed, or could deliver better outcomes if designed, funded or controlled locally.

After the break, the groups used the "thriving and resilient" scenario and the seven children to explore what success in 2043 would look like for their child, their community and Shetland as a whole. Each group agreed two or three priorities and identified the single decision they would want to look back on as having made the greatest difference. The Session closed with feedback from each group and closing remarks from Gary Robinson.



What the Evidence Told Us

Housing, transport and digital connectivity were presented as the infrastructure that enables community sustainability and resilience. Although often treated separately, they collectively influence whether people can live and work in Shetland, access services and remain connected, and whether employers can recruit and retain the people they need.

Several common themes ran across the presentation: demand is growing faster than supply, infrastructure is expensive to provide across a dispersed population, workforce pressures affect delivery and operation, and costs continue to rise. Access varies across Shetland, while many important funding, regulatory and commercial decisions sit with national government or private providers.

Shetland's housing system is under significant pressure. There were 44 new-build completions in 2024/25, against an estimated requirement for 1,200 to 1,500 homes over the next ten years. Only around half of households can afford the average private rent if no more than 30% of income is spent on housing, while the private rented sector is small and short-term lets continue to increase. Around 10% of the housing stock is classified as ineffective, and around 100 households experience homelessness in a typical year.

The issue is not simply the number of homes, but having the right homes in the right places at prices people can afford. Different communities face different pressures, and smaller household sizes mean more homes are needed for the same population: around 7,900 dwellings would have been required for 23,000 people in 1981, compared with almost 11,000 today. Suitable housing is therefore directly linked to workforce and population sustainability.

Transport was described as fundamental to daily life and the economy, connecting people to employment, education, healthcare and services, and supporting the movement of workers, visitors, freight and goods. Around 13% of Shetland's population lives on islands served by funded ferry and air links, alongside an extensive road and bus network.

Cost, reliability, capacity and ageing infrastructure were highlighted as the main constraints. Even after concessionary schemes, travel to mainland Scotland remains more expensive for Shetland residents than for people in any other Scottish island group. Capacity can be limited at peak periods, while transport affordability affects some households' access to opportunities. Reliable connections also help people remain independent in their communities and allow services to operate sustainably.

Digital connectivity was presented as both an opportunity and a vulnerability. Around 12.4% of Shetland premises cannot receive broadband speeds of 30 Mbps, while only 58% have predicted indoor 4G coverage from all four mobile operators. Shetland is one of the weakest-performing areas in the UK for mobile broadband speeds, with average speeds in the Faroe Islands around seven times faster.

Resilience is as important as coverage and speed. Nearly 3,000 broadband customers were severely affected by two prolonged outages in 2025, with the impact varying by provider. Cable failures and power outages have demonstrated the interdependence of broadband, mobile and electricity, and the consequences for communities, businesses, public services and emergency communications. This will become more significant as services move online and analogue telephone services are withdrawn.



Taken together, the evidence showed that housing affects the workforce, transport affects access and digital connectivity affects services. Different places will need different solutions, and decisions need to happen early because infrastructure has long planning and delivery times. Treating the three as a connected system will be central to creating the conditions in which people, communities and services can thrive.

Reflections on the Evidence Base

The discussions reinforced one central message: people experience housing, transport and digital connectivity as a single system. A job cannot bring someone to Shetland if there is nowhere suitable to live, a home does not sustain a community if travel is unreliable or unaffordable, and moving more services online will deepen disadvantage where mobile and broadband connections remain weak. Participants felt these should be judged by the choices and opportunities they create for people, not simply by the infrastructure provided.

Housing was identified as the most immediate and pressing challenge facing Shetland. Participants highlighted a range of issues, including affordability, limited availability of entry level housing, shortages of appropriate accommodation for families and key workers, barriers to downsizing, and the wider impacts of empty homes, second homes and short term lets. There was broad recognition that increasing housing supply alone will not be sufficient. Instead, a combination of new development, better use of existing housing stock and innovative community led solutions will be required to address the diversity of local need. The surprising scale of homelessness referenced during discussions further reinforced the view that housing pressures are more significant than headline supply figures may suggest.

Transport was consistently described as a critical enabler of both economic activity and community wellbeing. Concerns focused on the reliability, affordability, capacity and resilience of inter-island ferry services, alongside the challenges created by an ageing fleet and workforce constraints. Participants recognised the transformative potential of fixed links for some island communities, while also acknowledging that improved connectivity alone will not secure community sustainability without corresponding investment in housing, services and economic opportunities.

Digital connectivity emerged as another significant area of concern. Many participants were surprised by the extent of current challenges and felt that Shetland would be further advanced given the increasing importance of digital infrastructure to modern life. Connectivity issues were reported across both rural communities and parts of Lerwick. Participants highlighted the growing dependence on digital services for healthcare, education, employment and communication, raising concerns that existing gaps could become more significant as technologies continue to evolve. The analogue network switch off was also seen as a particular risk for areas with poor mobile coverage or limited infrastructure resilience.

A recurring theme throughout the evidence was the relationship between geography and inequality. Concerns were expressed that housing, services and investment could become increasingly concentrated in Lerwick, potentially creating a widening divide between the main town and smaller or more remote communities. Participants stressed that small population sizes can make rural communities appear less viable despite strong local demand and commitment. There was a clear desire for investment approaches that recognise the unique circumstances of island and remote communities rather than applying standard population-based models.



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The discussions pointed to six connected risks if these issues are not addressed:

- Housing shortages, transport limitations and digital gaps reinforce one another, constraining population retention, workforce recruitment and economic growth.
- Inequalities between Lerwick and smaller communities could widen if housing, services and investment become increasingly centralised.
- Ageing transport infrastructure and vulnerable digital networks increase the risk of disruption to communities, businesses and services.
- High costs, limited contractor capacity and remote locations could continue to delay housing and infrastructure projects.
- Young, older, and disabled people and low income households could face disproportionate barriers to participation and opportunity.
- High living costs, fuel poverty, limited childcare and workforce shortages could prevent wider investment from delivering its full benefit.

What this Means for a Thriving and Resilient Shetland

Across the discussions, participants described a Shetland where people have real choice about where they live, work and raise families, supported by the infrastructure and services needed for sustainable communities.

In this future Shetland:

- People can access affordable, suitable housing that meets their needs throughout different stages of life.
- Young people can remain, return or settle in Shetland, while older and disabled people can continue to live independently within their communities.
- Remote and island communities have sufficient housing, services, childcare, employment opportunities and connectivity to sustain population and local businesses.
- Transport is reliable, affordable and accessible, supported by resilient ferry, air and longer-term connectivity solutions.
- High-quality digital connectivity enables access to work, learning, healthcare and public services regardless of location.
- Homes are warmer, more energy efficient and more affordable to run, helping reduce fuel poverty and improve quality of life.
- Communities have the capacity, resources and influence needed to shape local priorities and deliver change.
- Public agencies work collaboratively around places and long-term outcomes, rather than through isolated service delivery models.
- National investment and policy decisions reflect Shetland's unique circumstances and support sustainable growth across all communities.



Priorities Emerging from Session 4

The discussions pointed to five areas for sustained Partnership action. The actions below distinguish between changes that can be progressed locally and those that required influence or partnership beyond Shetland.

1. Deliver Place Based and Community Led Development

Plan housing, services, infrastructure and investment around communities and local geography rather than centralised models. Strengthen community capacity through local partnerships, community leadership and place-based approaches to decision-making, particularly in smaller and remote communities.

Local Action and Local Control

- Develop a long-term framework that brings together housing, transport, digital connectivity, energy, services and community resilience.
- Plan around places and outcomes rather than individual services, recognising the different needs of Lerwick, Mainland communities and the outer islands.
- Assess investment by its contribution to positive population sustainability, economic opportunity, inclusion and community wellbeing outcomes.
- Make greater use of community assets and buildings as hubs for services, remote working, childcare, advice, housing and social activity.
- Provide stable, paid community development capacity where reliance on volunteers is creating constraints, and support community capacity more broadly.
- Build stronger partnerships between public bodies and communities, demonstrating how local views influence decisions and reducing duplication wherever possible.
- Ensure investment improves inclusion and reduces barriers faced by different groups and communities.

Influence and Partnership

- Secure greater flexibility for place-based decision making and locally controlled budgets.
- Establish a longer-term investment relationship with government that recognises Shetland's geography, costs and strategic importance.
- Use island proofing and the Islands Act more effectively to ensure national policies reflect Shetland's circumstances.
- Ensure public service reform strengthens local communities and avoids unnecessary centralisation.

2. Make Housing a Foundation for Population and Economic Sustainability

Increase the availability of affordable, suitable and adaptable housing through a mix of new supply, innovative delivery models and better use of existing homes. Support housing options for young people, families, key workers and older residents, while addressing fuel poverty through warmer, more energy efficient homes.

Local Action and Local Control

- Increase the supply and diversity of housing, including social, mid-market, private, part ownership, community led and entry level homes.
- Support innovative delivery models such as modular and off-site construction, particularly for smaller and remote communities.
- Bring appropriate empty and underused properties back into use where practical.
- Improve pathways for downsizing and provide more adaptable and supported housing.
- Support community involvement in housing priorities without transferring disproportionate delivery risk to volunteers.



- Improve energy efficiency and retrofit programmes to reduce fuel poverty and improve housing affordability.

Influence and Partnership

- Ensure national housing policy, funding programmes and delivery arrangements reflect Shetland's needs.
- Promote proportionate planning, procurement and regulatory approaches that recognise island circumstances.
- Explore opportunities to pilot housing models designed specifically for island and remote locations.

3. Improve Transport Connectivity and Resilience

Ensure reliable, affordable and accessible transport within Shetland and between Shetland and the mainland. Strengthen resilience across ferry and air services, improve integration between transport modes, and seek greater local influence over pricing, capacity and service design.

Local Action and Local Control

- Ensure transport, housing and service planning are coordinated.
- Continue building evidence on the economic and social impacts of transport costs, capacity constraints and service reliability.
- Ensure transport planning supports access to employment, education, healthcare and community life, particularly for island residents and those without access to a car.

Influence and Partnership

- Shape ferry and air services around island community needs rather than conventional commercial or demand-based models alone.
- Seek greater influence over fares, service design, timetabling and capacity decisions affecting Shetland residents and businesses.
- Secure investment in sufficient air and ferry capacity to support population growth, tourism, business activity and freight movements.
- Explore options for greater local control, public service obligations and alternative delivery models where these could improve affordability, resilience and responsiveness to local needs.
- Develop the strategic case for fixed links and stronger mainland connections as part of a wider transport and population strategy.

4. Treat Digital Connectivity, Energy and Affordability as Essential Infrastructure

Improve mobile and broadband coverage, address remaining connectivity gaps and strengthen network resilience through investment in future ready infrastructure. Support affordable living through improved energy efficiency, reduced fuel poverty and greater local benefit from Shetland's energy resources, recognising the importance of energy costs to household affordability and population sustainability.

Local Action and Local Control

- Improve local digital resilience through backup power, alternative routes and contingency arrangements.
- Prepare communities for analogue and copper network withdrawal.
- Use connectivity to support flexible working, learning, telecare, independent living and economic growth.

Influence and Partnership

- Work with telecoms providers and government to address infrastructure gaps, particularly in harder to reach communities.
- Ensure resilience, reliability and continuity are given equal importance to coverage targets.



- Identify where local partners could play a greater role in digital infrastructure delivery.
- Continue to make the case for a Shetland Tariff and stronger local benefit from Shetland's energy resources.

5. Deliver an Integrated Approach to Population Sustainability

Adopt a long term, joined up approach that recognises the interdependence of housing, transport, digital connectivity, childcare, social care, skills, employment and access to services. Use this integrated framework to support population retention, economic development and community resilience across all parts of Shetland.

Local Action and Local Control

- Support communities with the combination of infrastructure, services and opportunities needed to attract and retain families.
- Support communities with resilience planning and service continuity during disruptions.
- Agree shared priorities, named leads and common measures across public sector organisations

Influence and Partnership

- Promote rural and island models for childcare, social care and service delivery.
- Align national skills, apprenticeship and workforce programmes with Shetland's future labour market needs.
- Ensure national policies support population retention and community sustainability across all parts of Shetland.
- Assess programmes against their contribution to long-term community resilience, not solely population size or service volumes.

A Cross Cutting Theme: Influence and Local Control

Participants consistently highlighted the importance of strengthening Shetland's influence over the policy, funding and infrastructure decisions that shape island communities. Across housing, transport, digital connectivity, energy and public services, there was a clear aspiration for greater local control, stronger evidence-based advocacy and a more strategic relationship with Scottish and UK Governments, regulators and infrastructure providers.

Shetland's long term resilience depends on more than individual investment. It requires a joined up approach to housing, transport, digital connectivity, affordable energy and capacity of communities to respond to local needs. The challenge is to turn this understanding into shared action: tackling connected issues together, supporting communities to sustain their populations, and ensuring national policy and investment reflect the realities of island life. This means working pragmatically, building trust through openness, and having clear lines of responsibility and accountability.



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The following organisations were represented at this Session:

Brae Rural Energy Hub
Bressay Development Ltd
Burra & Trondra Community Council
Dunrossness Community Council
Fair Isle Development Company
Fetlar Community Association
Fetlar Community Council
Highlands and Islands Enterprise
Integration Joint Board
Lerwick Community Council
NHS Shetland
Northmavine Community Council
Northmavine Community Development Company
North Yell Development Council
Police Scotland
Sandness Community Development Group
Sandness & Walls Community Council
Sandsting and Aithsting Community Council
Scottish Environment Protection Agency
Scottish Fire and Rescue Service
Scottish Government
Shetland Amenity Trust
Shetland Arts Development Agency
Shetland Charitable Trust
Shetland Community Benefit Fund
Shetland Net Zero Energy Forum
Shetland Islands Council
Shetland Telecom
Skerries Community Council
Skerries Development Group
VisitScotland
Whalsay Kirk Development Company
Unst Community Council
Unst Partnership
ZetTrans

