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Table of Contents

1	Introduction	2
	1.1 Introduction	2
	1.2 Background	2
	1.3 Guidance	3
	1.4 Relationship Between Local Issues and Regional Issues	3
	1.5 Structure of Report	4
2	Background Context	6
	2.1 Introduction	6
	2.2 Environment	6
	2.3 Land Use and Settlement Patterns	7
	2.4 Culture	8
	2.5 Population	9
	2.6 Economy	12
	2.7 Social Inclusion	18
	2.8 Summary	19
3	Shetland's Transport Network	21
	3.1 Introduction	21
	3.2 Nature of Shetland's Transport Links	21
	3.3 Increasing Fuel Costs	22
	3.4 Carbon Dioxide Emissions	23
	3.5 Public Sector Support	23
	3.6 External Links - Introduction	24
	3.7 External Links - Air Services	24
	3.8 External Links – Ports	26
	3.9 External Links – Ferry Services	27
	3.10 Inter-Island Links	30
	3.11 Internal Transport - Introduction	34
	3.12 Internal Transport – Roads and Traffic	34
	3.13 Public Transport	38
	3.14 Walking and Cycling	40
	3.15 Summary	41
4	Policy Context	43
	4.1 Introduction	43
	4.2 Existing Shetland Local Transport Strategy 2000-2003	43
	4.3 HITRANS Regional Transport Strategy	45
	4.4 Scottish Executive Transport Policy	45
	4.5 Shetland Community Planning Framework	46
	4.6 Other “Context Setting” Strategies	47
5	Consultation Outcomes	49
	5.1 Introduction	49
	5.2 Methodology	49
	5.3 External Links	49
	5.4 Inter-Island Links	50
	5.5 Internal Transport	51
	5.6 Other Issues	52
	5.7 Summary	52
6	Problems and Opportunities	53
	6.1 Introduction	53
	6.2 Confirmation of Consultation Findings	53
	6.3 Analysis of Drivers, Constraints and Uncertainties	54

6.4	Problems and Opportunities.....	55
7	Vision and Principles.....	58
7.1	Introduction.....	58
7.2	Vision.....	58
7.3	Principles.....	58
8	Strategy Objectives.....	59
8.1	Introduction.....	59
8.2	Objective Development.....	60
8.3	Economy.....	60
8.4	Social Inclusion and Accessibility.....	61
8.5	Environmental Protection.....	62
8.6	Safety.....	63
8.7	Integration.....	64
9	External Objectives.....	65
9.1	Introduction.....	65
9.2	Land Use – Structure Plan and Local Plan.....	65
9.3	Economic Development Strategy - Shetland 2012.....	66
9.4	Economic Development – Shetland Enterprise Business Plan.....	67
9.5	Local Housing Strategy 2004-2009.....	68
9.6	Corporate Plan 2004-2008.....	68
9.7	NHS Shetland 2020 Vision.....	69
10	Option Generation.....	70
10.1	Introduction.....	70
10.2	Identification of Alternative Strategic Packages.....	70
10.3	Identification of Individual Schemes.....	71
10.4	Next Steps.....	73
11	Conclusion.....	87
11.1	Conclusion.....	87
	Appendix A – Shetland-Wide Fact Sheets.....	90
	Appendix B – Local Fact Sheets.....	103
	Appendix C: Scottish Index of Multiple Deprivation Analysis.....	144

1 Introduction

1.1

Introduction

On behalf of Shetland Transport Partnership (STP), this scoping report brings together initial work undertaken in the preparation of the Shetland Transport Strategy. In accordance with Scottish Executive guidance, it provides an assessment of the economic, social and transport context within Shetland, considers current and future transport problems, and proposes a vision and set of objectives.

The report also outlines the initial option generation process that has been used to develop potential projects for inclusion in the Shetland Transport Strategy. Therefore, this report paves the way for the appraisal process, which is the following stage in the Shetland Transport Strategy development process.

The report was prepared following an extensive consultation exercise with communities and stakeholders within Shetland, and a detailed analysis of key trends which will affect the nature and pattern of transport in Shetland in the future.

There are four main objectives of this report.

- To set the context for the Shetland Transport Strategy – including socio-economic issues, existing transport trends, and existing policy, and the main drivers and constraints that must be considered in the development of the Shetland Transport Strategy;
- To examine specific problems to be tackled, including outcomes from the consultation process, and review of relevant trends;
- To develop a vision, objectives and set of principles for the Shetland Transport Strategy; and
- To provide details of the option generation process, upon which the STAG appraisal will be based.

1.2

Background

The Shetland Transport Partnership (STP) came into being on 01 December 2005, following publication of the Transport (Scotland) Act 2005¹.

Shetland Transport Partnership is required to prepare a statutory Transport Strategy for their area. The strategy will make the case for investment and infrastructure in that region and will provide a guide to co-ordinate activities in Shetland. The Shetland Transport Strategy will also make the case for specific projects that would be candidates for funding from the Scottish Executive through specific grants. The Transport Strategy is to be produced by April 2007². The strategy will:

- Provide a vision and objectives for transport over a long term (10-15 year) time frame;
- Provide an analysis of the current situation;
- Set out a programme of activities, projects and interventions;
- Inform implementation and investment planning;
- Make the case for any additional contributions from stakeholders; and
- Support the National Transport Strategy and provide an input to the Strategic Projects Review.

In parallel to the development of the Transport Strategy, a Strategic Environmental Assessment (SEA) is being prepared to identify and assess any potential environmental impacts caused as a result of the strategies proposed within the Transport Strategy. An accompanying SEA scoping report has been prepared alongside this report.

¹ TSO (2005), *Transport (Scotland) Act 2005*. TSO, Edinburgh. Available from <http://www.opsi.gov.uk/legislation/scotland/acts2005/20050012.htm>

² Scottish Executive (2006), *Scotland's Transport Future – Guidance on Regional Transport Strategies*. Scottish Executive, Edinburgh. Available from <http://www.scotland.gov.uk/Publications/2006/03/06145237/0>

It is intended that the Shetland Transport Strategy will fulfil all the relevant statutory provisions required by the Transport (Scotland) Act 2005.

1.3

Guidance

Scotland's Transport Future: Guidance on Regional Transport Strategies outlines the process that should be adopted in the development of the Transport Strategy. The recommended process is in line with Scottish Transport Appraisal Guidance (STAG)³ and involves the following stages.

- Initial Scoping – Identification and understanding of transport problems, constraints and opportunities within the region. STAG Guidance also recommends that the problem identification involves a process of consultation.
- Agreeing a Vision – Although not a statutory requirement, it is recommended that a vision is set, informed by an understanding of the needs and current state of transport in the region and linked to the national transport vision and objectives.
- Setting the Objectives – In line with STAG, SMART objectives should be developed (specific, measurable, achievable, relevant and timed), which can be monitored and should work towards the delivery of the strategy's vision and national transport vision and objectives.
- Generating the Options and Initial Appraisal / Sifting – Options that look to address the Transport Strategy objectives will be set, drawing upon the ideas of the wider community as well as other sources. Options will be packaged into different scenarios and alternative options and scenarios will be developed for the purposes of appraisal.
- Appraising the Options – Following STAG, each of the options will be appraised within Appraisal Summary Tables (ASTs) against the Strategy Objectives and the five STAG criteria.
- Decisions on Options and Prioritisation – The strategy options arising from the appraisal will be outlined and prioritised. This should take into account fit with objectives, timescales, delivery and funding, for example.
- Consultation – The Draft Transport Strategy will be consulted on with key stakeholders, many of whom were previously consulted during the initial consultation phase, including community planning partners, and community councils, amongst other groups.
- Transport Strategy sign off and submission to Ministers for Approval – The Final Transport Strategy will be finalised following the consultation findings and will be submitted to Ministers.
- Ministerial Approval
- Publication

1.4

Relationship Between Local Issues and Regional Issues

The Shetland Transport Partnership is a single authority partnership. Whilst the majority of other local authorities will be developing their own Local Transport Strategy (in accordance with guidance issued in February 2005⁴) and contributing to the development of the relevant Regional Transport Strategy, the Shetland Transport Strategy covers both aspects.

Fortunately, the principles of both sets of guidance are similar, with the core strategy development processes following guidance provided within the STAG document.

What makes the Shetland Transport Strategy different from other statutory Regional Transport Strategies will be the breadth of coverage. At the very localised level, issues such as the development of local footpaths within and between settlements, and the distribution of public transport information requires to be considered. However, this is contrasted with issues such as significant potential strategic capital investment and works related to inter-island links, and policies relating to improving the external links from Shetland to the UK Mainland and European Mainland.

The Shetland Transport Strategy responds to this issue in a number of ways.

- We have developed throughout the strategy three clear themes – External Links, Inter-Island Links, and Internal Links.

³ Scottish Executive (2003), *Scottish Transport Appraisal Guidance*. Scottish Executive, Edinburgh

⁴ Scottish Executive (2005) *Scotland's Transport Future – Guidance on Local Transport Strategies*. Scottish Executive, Edinburgh

- There is an over-arching vision, framework, and objectives applicable to each of the three themes.
- There is a hierarchy of appraisal – with most effort being placed on appraising the most significant schemes (or packages of schemes), and those with the largest scheme impacts.

The result will be a transport strategy that fulfils the requirements of both local and regional transport strategy guidance, satisfactorily covers the breadth of local and regional issues, but maintains a consistency of approach between the different elements.

1.5 **Structure of Report**

The following sections briefly summarise the main contents of this report.

1.5.1 *Chapter 2 - Background Context*

Following the current introductory chapter, this report outlines the social-economic context within which the Transport Strategy will be set. Environment, culture, land-use, population, the economy and social inclusion are the main themes that are focussed upon within this chapter in order to contextualise some of the wider socio-economic trends, constraints or drivers that the Transport Strategy should look to respond to and address.

1.5.2 *Chapter 3 - Shetland's Transport Network*

In Chapter 3, the range of transport services and infrastructure in Shetland is outlined according to the three identified categories of transport provision – external links, internal links, and inter-island links. In particular, concentration is focussed on analysis of trends within each of these categories in order to understand what is happening at present, and what trends suggest for the future.

It is also noted that in parallel to the development of this scoping report, a detailed examination into trends on the inter-island ferry network is being undertaken. When available, the results of which will be used to help inform the appraisal of ferry options within the Transport Strategy.

1.5.3 *Chapter 4 - Policy Context*

A review of the existing policy context forms the final element of background context setting. Prior to developing a vision and objectives for the Transport Strategy, it is essential to understand the broader vision and objectives that Shetland is working towards, and the framework within which the Transport Strategy will be set.

Attention is given to the existing Local Transport Strategy (LTS) adopted by Shetland Islands Council (SIC) and the existing HITRANS Regional Transport Strategy, as well as national policy. Consideration is also given to the Shetland Community Plan.

1.5.4 *Chapter 5 - Consultation Outcomes*

Initial consultation took place between October 2005 and February 2006 and included meetings with each of the Community Councils in Shetland, as well as consultation with residents on each of Shetland's smaller isles. Businesses and other stakeholders including transport operators were also consulted during the process. The members of the Regional Transport Partnership (RTP) Board – NHS Shetland and Shetland Enterprise – were also consulted.

In Chapter 5, the key results of the consultation programme are presented. It is also noted that a more detailed report of the consultation findings are provided in a separate Consultation Report and Appendices.

1.5.5 *Chapter 6 - Problems and Opportunities*

The background research into relevant transport and socio-economic data, and the findings from consultation, allowed the development of a list of key problems and opportunities that the Transport Strategy should look to address. These problems and opportunities are listed under each of the five national transport objectives – Economy, Environment, Integration, Accessibility and Safety, as well as a series of External Elements.

1.5.6 *Chapter 7 - Vision and Principles*

Chapter 7 presents the vision and principles for the transport strategy. It has been important to consider a set of "ground rules" or "principles" that the STP should consider adopting, alongside the proposed vision and objectives.

1.5.7 *Chapter 8 - Objectives*

A series of objectives are presented in Chapter 8, taking into account consultation, problems and opportunities, constraints and uncertainties.

1.5.8 *Chapter 9 - External Objectives*

In addition to the specific transport objectives of the Transport Strategy, a number of objectives and principles from wider relevant strategies have been identified.

1.5.9 *Chapter 10 - Option Generation and Sifting*

Chapter 10 outlines the process used to develop the scenarios and the long list of options considered for inclusion in the Transport Strategy.

In addition, a series of appendices support this report, including:

- Appendix A – Wider Issues ‘Fact Sheet’
- Appendix B – Local ‘Fact Sheets’;
- Appendix C – Analysis of Scottish Index of Multiple Deprivation.

2 Background Context

2.1

Introduction

The chapter provides an overview of trends with respect to Shetland's:

- Environment;
- Land-use;
- Culture;
- Population demographics;
- Economy; and
- Levels of deprivation.

Having described the main characteristics of these elements, and identified appropriate trends, each section will outline the main constraints or drivers within each of these categories.

In addition, appendices are also provided to offer some further background information. Appendix A presents details on wider issues affecting transport provision in Shetland, and includes sections on the context regarding Shetland, Shetland's external transport links, transport and the elderly, transport and youth groups, transport and disabled groups, and transport and health. Appendix B, meanwhile, presents a set of more localised information based on each of the Community Council areas. Appendix C presents an analysis of results from the Scottish Index of Multiple Deprivation (SIMD).

2.2

Environment

In parallel to the development of the transport strategy, a Strategic Environmental Assessment (SEA) is being progressed. The SEA Scoping Report is being published in parallel with this report, and identifies in more detail the key environmental issues relevant to transport in Shetland.

The archipelago that makes up Shetland encompasses over 100 islands. The General Register Office for Scotland⁵ notes that 16 of these (including Mainland of Shetland) are inhabited. Of these, a number (East Burra, West Burra, Trondra, Vaila, Muckle Roe) are connected to the Mainland of Shetland by fixed links. The 10 remaining offshore inhabited islands are connected to the Mainland of Shetland via ferry links. It is noted that the two islands of Bruray and Housay are connected by a bridge, and together are commonly referred to as *Out Skerries*, or simply *Skerries*.

Located within the North Atlantic Sea, Shetland is as close to Bergen in Norway as it is to Aberdeen. The distance from Hermaness in the North to Sumburgh Head in the South is almost the same as that from Edinburgh to Aberdeen (over 100 miles). Shetland covers an area of 567 square miles with over 900 miles of coastline. Many areas of Shetland are particularly indented by deep sea lochs, or Voes.

Severe weather conditions are frequently experienced in Shetland. The area is often subject to very high winds, and severe sea conditions. Furthermore, during the summer, the island's airports and smaller airstrips can often be affected by fog. These weather conditions can seriously disrupt transport arrangements to Shetland, and within Shetland.

Shetland's landscape consists of low lying hills of up to 50% peat moor-land. The coastline consists of sandy beaches and more rugged coastal terrain including some of the highest sea cliffs in the UK. There are very few trees or shrubs within Shetland and almost no woodland due to the harsh weather conditions to which Shetland is fully exposed, and the grazing regime.

⁵ General Register Office for Scotland (2003), *Occasional Paper No 10 – Scotland's Census, Statistics for Inhabited Islands*. GROS, Edinburgh.

There are significant areas of land and coastlines subject to environmental protection classifications. Shetland is also home to many important and rare species.

Within Shetland, there are also many well-preserved historic sites including Neolithic and more recent settlements, Viking settlements, brochs and ancient crofts – all of which are important contributors to Shetland's strong and unique cultural identity and will require consideration prior to the development of any transport infrastructure.

Overall, the physical environment places a considerable constraint on Shetland's transport through:

- Its physical location, remote from the UK Mainland;
- Its topography, including the number of inhabited islands and the natural barriers caused by the highly indented coastline;
- Severe weather conditions, difficult sea conditions, and susceptibility to fog; and
- A special environment, with designated areas of land and coastline, many rare and protected species, and significant historic sites.

2.3 Land Use and Settlement Patterns

2.3.1 Land Use Pattern

Shetland's land use and settlement pattern is to a large extent dominated by its topography and environment.

- The majority of the higher level peat moorland is used for sheep grazing.
- Lower lying land is typically occupied by either crofts, or some areas of arable land (principally in Dunrossness, and in Unst where the land is flatter and more fertile).
- The principal settlements have typically grown up beside the coast or Voes, or where there is other flatter and low lying land available. Historically, an important form of communication and access was through shipping. The majority of the population are based in and around Lerwick, South Mainland, or Central Mainland.
- Outwith the main settlements, there is typically a very dispersed pattern of dwelling houses.
- Other areas of low lying flat land are also used for the islands' airports (Sumburgh, Tingwall, Scatsta), the Sullum Voe Oil Terminal, or port related developments (Lerwick, Scalloway, Sella Ness).
- Many of Shetland's Voes and inlets are now used for aquaculture – including mussels and fish farms.

2.3.2 Population Distribution

The spatial distribution of Shetland's population is viewed as a constraint that will require consideration in the development of projects for the Transport Strategy. Outside Lerwick, Shetland has a very scattered settlement pattern with low population numbers located in some of the most remote parts of the Mainland of Shetland, served only by single track roads, as well as significant proportion of population living on the offshore islands. Some of these islands are very remote and sparsely populated. Accordingly, in some areas this makes it difficult to deliver frequent or financially sustainable public transport services.

However, it is also noted that in some areas, the topography has forced a settlement pattern that supports the transport network. For example, many communities in South Mainland are easily connected to the Spine Road which links Lerwick and Sumburgh.

2.3.3 Development Control

Opportunities to control the pattern of land use (especially housing) in Shetland are limited due to the culture of house building on family crofts. For instance, many Shetlanders choose to build their own homes, and commonly build these on private farming land which is only linked to the main road network by private accesses. This distinct and historic development pattern can be difficult to link into public transport routes and as such can reduce opportunities to improve accessibility, and reinforces reliance on the private car.

2.3.4 Future Significant Developments

A number of developments are currently being considered within Shetland, which may have significant implications for the transport network.

- Housing, across Shetland – Shetland Islands Council are proposing a significant level of investment in public sector housing across Shetland, in response to national obligations to ensure local demand is met. Whilst the majority is likely to be constructed in and around Lerwick, it is likely that locally significant developments will also be planned for the larger settlements across Shetland.
- Fish Meal Plant and Pier, Sella Ness – A fish meal plant is currently within the planning process, for a location at Sella Ness, near to the Sullom Voe Oil Terminal. The transport impact will principally depend upon where the material for processing will be sourced, and how it is transported to the site.
- Quarry, Brae – A proposal is currently being considered for a quarry development near Brae. The transport impact of the site will relate primarily to local haulage routes, and the methods by which quarried material will be exported from Shetland.
- RAF Saxa Vord – The closure of this surveillance site has promoted the development of a specific response team. Progress to date has related to the suspension of fares from the Unst-Fetlar-Yell ferry service, and the identification of a preferred developer to enable the re-use of the site. Options for re-use of the site include the development of a distillery, a tourist/visitor/scientific centre related to the area's geology (Geo-Park), and also high quality niche tourism.
- Oil Rig Decommissioning – Shetland potentially provides a competitive location for oil rig decommissioning work, given its proximity to the North Sea oil fields. Sites suitable for the work will require deep berths, adjacent to available flat land. Transport infrastructure, in terms of access roads, and (if necessary) ferry links with sufficient capacity to cater for workers and plant/materials, would be required to support any such development.

2.3.5

Summary of Issues

In summary, key constraints provided by the land-use and settlement pattern are:

- It is very difficult and expensive to provide and maintain public transport services and transport infrastructure to sparsely populated areas, remote Mainland, and island communities.
- Opportunities to control the pattern of land use (especially housing) can increase opportunities to improve accessibility, and can reduce reliance on the private car. However, this is hard to achieve within a Shetland context which historically has continued the tradition of single house developments.
- A range of specific potential future developments have been identified, each of which may have a significant impact on either the existing transport network, or drive the requirement for supporting transport infrastructure or services.

2.4

Culture

One of the key characteristics commonly used in references to what makes Shetland's culture is the strong sense of community spirit amongst Shetlanders. It is believed that this community spirit has been instilled through past generations working together in crofting, knitting and fishing in tough and challenging environment. Today, many sporting and music festivals take place in Shetland, involving the whole community. These festivals help to maintain the islands' strong community spirit and identity.

Another key characteristic of Shetland's culture are the links with its Scandinavian heritage. Shetland's Norse links are evident through various means, whether this be the Up-Helly-Aa festival or the distinctive local Shetland dialect which is derived from Old Norn.

Throughout the consultation process, it became apparent that in general Shetlanders maintain high expectations for improvement of their transport network – be it through lower fares, high levels of accessibility, or generally improved levels of service. Whilst it will be a goal of the Transport Strategy to improve the transportation system, discussions with officers of SIC emphasised an acknowledgement that Shetland currently has relatively high standards of transport services, and perhaps the main challenge of the Transport Strategy will be in the maintenance of the existing system rather than improvement.

It is also recognised that crofting and fishing still play a major role in the cultural identity of many Shetlanders. However, there appears to be an increasing shift away from traditional Shetland lifestyle patterns and expectations (which typically have lower mobility requirements and demands) towards more modern lifestyles with higher standards of living, and expectations or

requirements for mobility. It is apparent that these wider pressures appear to have reduced the relative attractiveness of living in some of the more remote areas of Mainland Shetland, and some of the more remote islands.

Shetland also has a strong sense of independence, and the desire to lead by example is a further trait common to Shetlanders. For example, consultation revealed a strong desire for Shetland to build on the work developed by the innovative PURE renewable energy organisation in Unst, and lead by example in the development of hydrogen powered transport services. A key challenge of this Transport Strategy will be to deliver transport services that maintain and enhance Shetland's reputation as a leader in innovation as far as transport is concerned.

Issues related to the culture of Shetland are:

- A perception that there are high expectations for improvement, although the challenge may be in the maintenance of the existing system more than improvements.
- Ongoing changes in lifestyle aspirations, with a move away from traditional crofting/fishing communities, to more modern lifestyles, with resultant changes in demands for mobility (both within Shetland, and to and from Shetland), and choices on where to live.

2.5

Population

2.5.1

Population Trends - Shetland Level

The current population of Shetland is just under 22,000, and this level has been relatively stable for a number of years. Following decades of decline the population of the islands was recorded at 17,325 in the 1971 census, but by 1981 had grown to a peak of 22,766 as a result of oil activity.

Table 2.1: Shetland's Population, 1971 - 2005

	1971	1981	1991	2001	2004	2005
Shetland Islands	17,325	22,766	22,522	21,988	21,940	21,983

Source: SCROL

Analysis has been undertaken regarding the key components of change between 1991 and 2001 (Table 2.2). The estimated net change was a decrease of 570. The estimated balance of out-migration and in-migration was a reduction of 1,022; whilst the estimated natural change (balance of births over deaths) was in fact an increase of 452.

Out migration is heavily influenced by the tendency of young to move away from Shetland, to pursue further education or suitable employment opportunities. This trend is reflected across the wider Highlands and Islands area, and is not specific to Shetland.

Table 2.2: Components of Population Change, 1991-2001

Area	Estimated Change in Numbers	Estimated Net Civilian Migration and Other Change	Estimated Natural Change
Shetland Islands	-570	-1,022 (-4.5%)	+452 (+2.0%)
Scotland	-19,130	-12,785 (-0.3%)	-6,345 (-0.1%)

Source: GROS Mid-Year Population Estimates

Forecast population levels are also available, as shown in Table 2.3. This table shows that the population of Shetland is forecast to decline over the years and could drop by approximately 1,000 residents over the next 10 years, and by approximately 2,500 by 2024 (i.e. in less than 20 years).

Table 2.3: Projected population by Council and NHS board area (2004-based).

	2006	2011	2016	2021	2024
Shetland Islands	21,972	21,592	20,946	20,128	19,553

Source: GROS

The relatively small population size of Shetland can be a constraint on the provision of transport services in Shetland and needs to be considered in the development of projects. From a

transport operator viewpoint, for instance, low population levels can make it difficult to provide economically viable transport services. Relatively low population levels also means relatively low volumes of goods moving to and from the islands, which reduces efficiencies.

It is also noted that some specialist services or facilities require a certain population threshold to make them viable. Shetland's relatively low population levels can increase the need to travel off the islands to access specialist services or facilities which cannot be viably delivered locally. This is an important consideration for health delivery, and other specialist services. Frequently, for the Health Service, such services are based in Aberdeen.

2.5.2

Population Trends – Ward Level

Table 2.4 presents population trends at a ward level. It is to be highlighted that around one third of Shetland's population are located in Lerwick and those wards that have shown most stable population trends or indeed have shown population growth are those located around Lerwick, such as Tingwall, Bressay, and Sandwick / Cunningsburgh. This reflects the dominance of Lerwick and other rural communities accessible to Lerwick. Those settlements where population decline is greatest are those furthest away from Lerwick, such as Northmavine, Delting and Dunrossness.

Considerable population decline is also clear in Shetland's offshore islands such as Yell, Unst, Fetlar, Skerries, Papa Stour, and Foula. The Unst population is estimated to have significantly dropped further since 2001 following the withdrawal of the Ministry of Defence from Saxa Vord. Moreover, information gathered whilst on some of the remote islands suggests that the population of these islands continues to decline. Exceptions from these island trends are Whalsay, where the population has remained remarkably stable, and Fair Isle, which is owned by the National Trust for Scotland.

These trends tend to reflect wider trends in the Highlands and Islands area of steady growth around (but not necessarily within) population centres, some growth in more accessible rural areas, and steady decline in remote mainland areas. The issue of most serious concern is the significant loss of population from smaller, most fragile islands⁶. Continued population decline in the future could act as a constraint on the levels of air and ferry services provided to these islands, and also affect the viability of the communities on these islands.

⁶ Nicholson, A (2004), *Demographic Change in the Highlands and Islands*. Published in Scottish Executive (2004), *Scottish Economic Report: March 2004*. Scottish Executive, Edinburgh. Available from <http://www.scotland.gov.uk/Publications/2004/03/19038/34121>

Table 2.4: Population trends for Shetland wards, 1981 – 2001.

Community	1981 Census	1991 Census	2001 Census	10 Year % Population Change	20 Year % Population Change
Bressay	334	352	384	9	15
Burra	850	929	850	-9	0
Delting	2211	1976	1734	-12	-22
Dunrossness	1591	1502	1471	-2	-8
Fair Isle	69	67	69	3	0
Fetlar	101	90	86	-4	-15
Foula	45	42	32	-24	-29
Gulberwick / Quarff	579	398	662	66	14
Lerwick	6,899	7,336	6,830	-7	-1
Nesting	506	512	570	11	13
Northmavine	898	878	841	-4	-6
Papa Stour	35	35	24	-31	-31
Sandsting	1,002	891	945	6	-6
Sandwick/Cunningsburgh	1,303	1,352	1,432	6	10
Scalloway	1,160	802	812	1	-30
Skerries	88	87	76	-13	-14
Tingwall	1,080	1,431	1,772	24	64
Trondra	93	117	133	14	43
Unst	1,140	1,055	720	-32	-37
Walls and Sandness	573	554	601	8	5
Whalsay	1,025	1,041	1,034	-1	1
Yell	1,191	1,075	957	-11	-20
Mainland Shetland	17,755	17,596	17,575	0	-1
Shetland	22,768	22,522	21,988	-2	-3

Source: Shetland in Statistics 2005

2.5.3

Age Structure

Trends between 1991 and 2001 reveal that the percentage of population aged 44 years or less decreased from 65.9% in 1991 to 60.1% in 2001. The percentage of the population aged 65 years or older has increased from 13.7% in 1991 to 14.1% in 2001. These trends confirm an ageing population, however in comparison to the wider Highlands and Islands area, Shetland has one of the youngest overall populations, with a mean age of 38.⁷

Table 2.5 provides estimated population characteristics for Shetland based on TEMPRO predictions. Results clearly show that Shetland's population is forecast to age and will continue to do so into the future in line with regional and national trends. Consideration will therefore be required within the Transport Strategy on projects that look to address the transport needs of older people. This could mean, for example, a greater focus on the provision of suitable public transport and other measures that look to improve the accessibility of elderly people.

Table 2.5: Estimates of Future population structure in Shetland

Shetland	Population under 16	Population aged 16 – 64	Population aged 65 and over
1991	5,016	13,629	2,985
2001	5,218	14,563	2,714
2006	5,020	14,347	2,697
2011	4,865	14,145	2,690
2016	4,809	13,729	2,888
2021	4,783	13,365	3,052

Source: TEMPRO

2.5.4

Summary of Issues

Constraints and opportunities related to population trends are:

- There is a general trend of population growth around the centre of Shetland (accessible rural areas), decline within the centre of Lerwick itself, decline in remote rural areas, and decline on the most fragile islands.

⁷ Highlands and Islands Enterprise (2003), *Network Economic Information – Shetland Islands Economic Update, October 2003*. Highlands and Islands Enterprise, Inverness. Available from <http://www.hie.co.uk/HIE-Area-profiles-2003/HIE-shetland-area-profile-2003.pdf>

- Overall, Shetland offers a limited market size – both for passengers, and for freight, which has an impact on the efficiencies that can be achieved for transport providers.
- Across Shetland, there is an ageing and declining population, which may mean a higher dependence in future years on the public transport system.
- There is a particular trend in younger members of the community migrating from Shetland to access employment and higher education opportunities.

2.6

Economy

Within this section, key sectors of the Shetland economy are described with specific regards to future trends that could influence the projects taken forward as part of the transport strategy. This section has been informed by reference to *Shetland 2012*, the Local Economic Forum's Economic Development Strategy⁸, as well as outcomes from stakeholder consultation.

2.6.1

Economic Location Trends

"Shetland 2012", the Local Economic Forum's Economic Development Strategy notes that

The need to reduce costs in order to compete means that economic development is gradually drifting closer to the points of shipping away from the more rural parts of Shetland. Finding alternative job creating opportunities for the remoter areas is proving difficult.

This trend has been further examined in research undertaken for Highlands and Islands Enterprise by the Institute for Transport Studies, University of Leeds⁹. This suggests that on top of the drive to reduce costs, a number of other factors also play a part in this centralisation tendency for new investment, relocation and start ups. These include:

- Availability of labour,
- Market Demand,
- Institutional Networks,
- Culture of Enterprise,
- Lifestyle and image factors.

However, it is noted that some industries are specifically location dependent (such as quarries, tourism facilities, aquaculture, and port related activities).

2.6.2

Sector by Sector Analysis

Tables 2.6 outlines the value of key sectors of the Shetland Economy and is provided to give an indication of the main employment sectors in Shetland and their importance to the local economy.

Table 2.6: Value of Key Economic Sectors of the Shetland Economy (£m)

	1996	2000	2001	2002	2003
Oil Production Operations	50.4	53.0	116.1	65.0	57.7
Combined Fisheries Output	97.8	202.8	223.9	208.2	243.1
Agriculture	14.3	11.7	12.4	13.1	13.1
Knitwear	4.0	5.0	2.5	3.0	2.5
Tourism	11.3	12.0	12.75	12.6	12.6
Shetland Islands Council	111.1	124.7	150.5	133.4	127.0
Total	288.9	409.2	518.1	435.3	456.0

Source: Shetland in Statistics 2005

⁸ Shetland Economic Forum (2003), *Shetland 2012 – Economic Development Strategy*. Shetland Islands Council, Lerwick.

⁹ Laird, JJ, Nellthorpe, J; Mackie, PJ (2004), *Option Values, Business and Population Impacts in Transport Assessment: Scoping Study*. Report by Institute of Transport Studies, University of Leeds for Highlands and Islands Enterprise, Inverness. Available from <http://www.hie.co.uk/HIE-Transport-reports-2004/option-values-business-and-population-impacts-in-transport-assessment---scoping-study.pdf>

Table 2.6 shows that Shetland's economy is fluctuating in nature. The role of the oil industry appears to be declining and it will therefore be important that its value in economic terms is replaced. However, it is noted that recent increases in the price of oil may well help to slow the decline, as exploration effort is increased.

2.6.3

Traditional Industries

In the past, Shetland's economy has been built around the traditional industries of fishing, knitting and crofting. However, there is continued concern about the future viability of some of these industries. For example, recent decommissioning of the white fish fleet has led to loss of employment and there is continued concern over future fishing quotas and the impact that this will have on Shetland's future economy.

As Shetland's economy has grown, crofting has also become less common. There is less money to be earned from owning and running a croft nowadays, although many people still run crofts on a part-time basis.

2.6.4

The Public Sector

The role of local services in helping to sustain local communities and employers also has to be remembered in considering the future economic development of Shetland. Shetland Islands Council and NHS Shetland, for instance, are the two major employers in Shetland.

Economic development strategies highlight that, in the future, it is anticipated that public sector employment will reduce.

2.6.5

Oil Industry

As previously indicated, population growth was triggered in Shetland in the 1970s following the discovery of oil and gas in the North Sea east of Shetland. A significant construction programme followed the discovery of oil, with the development of Sullom Voe Terminal (SVT) and infrastructure developments such as the improvement of Sumburgh Airport and the spine road are examples of this. SIC have accrued money from agreements over Shetland's oil and this has been collected in the Charitable Trust, which has been used to fund a number of community projects i.e. the development of care homes, recreation centres and facilities for the disabled.

Through these means, Shetland has some of the best and most modern public facilities in the UK. The 1980s and 90s saw a new era for Shetland people, one of low unemployment and improved personal wealth for most people.

Despite exploitation of oil reserves to the west of Shetland, the amount of oil being processed at Sullom Voe Terminal has declined in recent years. Recent increases in the price of oil, and global pressure on supply, may continue to make further exploration and exploitation of oil reserves adjacent to Shetland viable.

Economic development strategies highlight that it is likely that employment will have to be cut at SVT to make the terminal more efficient in the next few years.

One area where there is believed to be future economic opportunity is related to the decommissioning of the North Sea oil infrastructure (i.e. dismantling of the oil rigs), in which Shetland may have a locational advantage over other areas. If specific sites were developed, it will be important that supporting transport infrastructure is provided.

It is noted that the oil industry's supporting logistics operations (for both equipment and personnel) are largely undertaken independently of other elements of Shetland's transport services and infrastructure.

2.6.6

Aquaculture

Aquaculture is an industry that has developed over the past 20 to 30 years in Shetland with salmon and mussel farms familiar sites around the coast of Shetland. Various operational and economic complications have brought fragility to this industry in recent years.

Diversification and adding value to the aquaculture industry is viewed as one source of future economic development in Shetland, including organic production and new products such as cod, mussels and oysters.

The aquaculture industry is supported by various supply and distribution chains. This includes the transportation of feed for farmed fish, transportation of finished fish to fish processors, and

the export of processed fish. Being based in coastal locations, for many fish farms, there can be efficiencies to be gained by the use of small work boats and well boats for freight transport, although HGV access remains important at many locations.

2.6.7 *Fishing*

The fishing fleet is divided into three sections – Pelagic, Whitefish, and Shellfish. The Pelagic fleet is currently very successful, and Shetland is home to one of the largest and most modern fleets in the UK.

The Whitefish fleet has suffered a number of setbacks recently, due to increased costs, fish scarcity and quota restrictions. It is generally accepted that the decline has largely “bottomed out” and a new Whitefish vessel has recently been constructed for the Shetland fleet.

The Shellfish fleet is relatively small scale, but provides important local opportunities.

Once landed the Whitefish and Shellfish require to be promptly processed, and then transported to markets, which are typically on Mainland UK, although some are exported abroad.

2.6.8 *Fish Processing*

Fish processing is the largest of Shetland traditional sectors, and had an estimated turnover of £102 million in 2001. There are a number of fish processing companies located throughout Shetland ranging in size and the type of fish processed. A number of these companies, such as Shetland Catch and Johnson’s Seafarms have been consulted as part of the Transport Strategy process.

The recruitment of skilled production staff, improved marketing of higher value products under the Shetland brand, a shortage of professional and marketing personnel, freight link dependability and escalating costs of transporting to the UK Mainland are some of the key issues that have been identified as facing the industry.

It is noted that the pelagic fish processing sector operates its supply and distribution network independently from other services. Pelagic trawlers land their catch straight to the processing facility. Processed fish are frozen, and then directly loaded onto refrigerated vehicles for consolidation in Europe, or for direct shipment to other international markets.

Fishmeal processing facilities process the fishmeal arising from the pelagic sector. There is currently one facility currently operational on Shetland (on Bressay). This requires numerous HGV transfers from the Shetland Catch plant in Lerwick across the Bressay Ferry. A second fishmeal plant is also being considered for a site at Sella Ness, near to the Sullom Voe terminal.

Salmon, Whitefish and Shellfish are however particularly dependent on the Island’s lifeline ferry service to the UK. These products are processed locally, sold fresh, and to retain value, require to be efficiently, directly and reliably transported to freight consolidation centres in the central belt of Scotland for onward distribution.

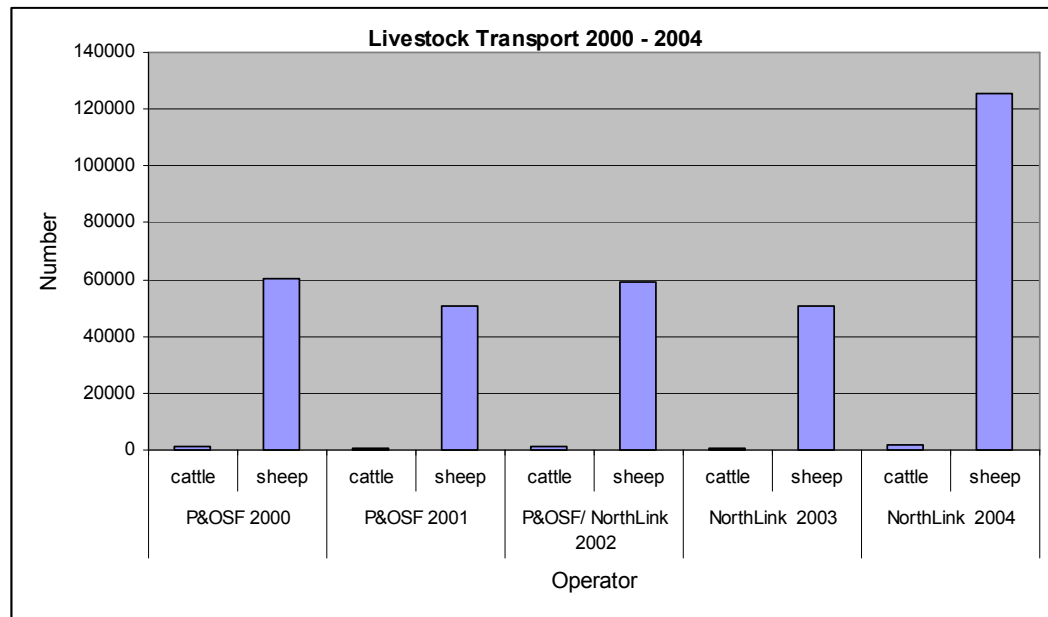
2.6.9 *Fish Ancillary Services*

Fish Ancillary Services includes engineering and specialist supply businesses that serve the fisheries sector. In recent years, businesses servicing fishing vessels have experienced a decline in trade caused by the reducing number of vessels in the Shetland fleet, as well as the fact that more local boats are having work done when they are in ports outside of Shetland.

2.6.10 *Agriculture*

Whilst there is some arable farming in Shetland, and some cattle, sheep farming is predominant agricultural activity. During the spring and summer lambs are bred on the islands, and during late summer/autumn are sold on to UK Mainland farmers for finishing. Due to the requirement to feed the stock during the winter, very few lambs are finished, and subsequently slaughtered in Shetland. Accordingly, high numbers of sheep are exported to Scotland Mainland by ferry each year, as illustrated in Figure 2.1.

Overall, however, it has been suggested that trends for farming in Shetland point towards a potential downturn in activity. It is estimated that only around 10% of farmers in Shetland are full time – the rest are part-time crofters. Typically between 50,000 and 60,000 lambs would be exported each year, although there has been a one-off increase in recent years due to the Scrapie scheme, to around 140,000, which has reduced stock levels.

Figure 2.1: Livestock Transport Lerwick - Aberdeen, 2000 - 2005

Source: Scottish Executive

Consultation has been undertaken with stakeholders in the agricultural industry including representatives from the National Farmer's Union and the Crofter's Foundation. Key issues related to transport and agriculture are highlighted below.

- **Costs of freight transfer** – The cost of freight transfer is one element affecting the viability of different agricultural enterprises. If future potential fuel price increases are translated into higher freight rates, this will continue to affect the viability of Shetland's agricultural industry. For example, it costs £21 for a bale of hay at the quay in Lerwick, compared to £5 in Aberdeen.
- **Changes to livestock transfer charging mechanisms** – the offer of subsidy to freight on the Northern Isles lifeline ferry service, and the requirement to apply with European regulations, means that livestock is to be charged on a lane metre basis. This could lead to an increase in livestock freight charges.
- **Compliant livestock transfer facilities** – The current means of providing livestock transfer on the Ro-Ro Northlink vessels are General Livestock Trailers (GLTs). These are now obsolete, and are at the end of their effective lives. The replacement of these facilities is to be included under the terms of the new Northern Isles Ferry Tender. A two-tiered design would enable optimisation of stock carried, per lane metre length.

Some wider issues are impacting on agriculture in Shetland. These include changes to the basis of farm or croft support mechanisms, which may further reduce sheep numbers in Shetland. Ongoing wider difficulties of maintaining agriculture as a viable economic concern is also affecting ability to retain future levels of farming and crofting activity.

2.6.11

Tourism

A Shetland Visitor Survey was undertaken in 2000 revealing the following:

- 47,179 visitors arrived in Shetland in 2000, spending over £11.9 million.
- 34% of these visitors were holiday makers, 18% were visiting friends and family, and 45% were business visitors.
- A further 11,300 passengers arrived by cruise ships and 370 by yachts.
- Most visitors stated that they visited Shetland for its wildlife and environment. However, whilst these aspects were highly regarded by visitors, they were generally less impressed with the general standard of services available in Shetland.

It is anticipated that tourism will take on a greater role in Shetland's future economic development. It is also believed that there could be significant opportunity to develop eco-tourism in Shetland, building upon the islands' unique environment and recent favourable television coverage. This could link to walking and cycling opportunities. The introduction of the new direct flight to Sumburgh from London and Faroe is also seen as a significant development that could help increase the attractiveness of Shetland for tourists. There are also fears that proposed changes to the schedule of the Smyril Line Scandinavian ferry link could also reduce the attractiveness of Shetland as a tourist destination for Scandinavians and Faroese.

Consultation revealed a number of constraints or barriers that could hold back the development of this sector in Shetland. One of these is the overall expense involved in travelling to Shetland, particularly if travelling with a family, and with a car. Once in Shetland, the public transport network is not necessarily geared towards the needs of tourists, although the difficulty of achieving this is also recognised.

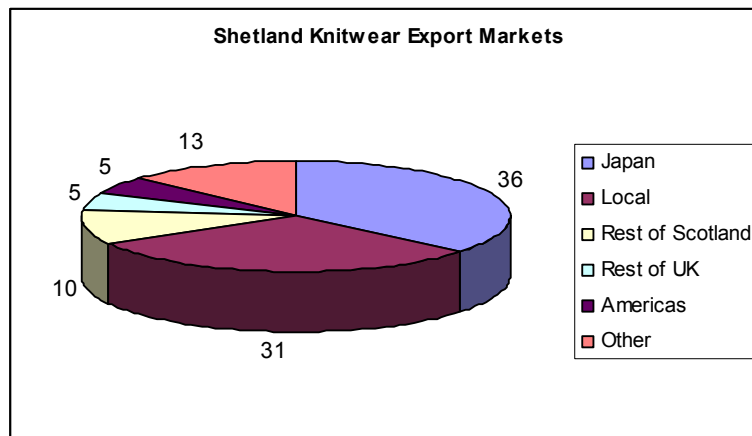
Wider constraints and opportunities related to Shetland tourism have recently been captured within the development of a tourism strategy for Shetland.

2.6.12

Knitwear

Shetland is renowned for the local knitwear industry, although the industry is facing a period of uncertainty. Annual turnover of the industry in 2003 stood at just £2.5m, which is a decline from previous years. It was estimated that there were 150 employed workers in the knitwear industry in 2004. Reasons cited for the decline in the industry include the success of other sectors which means that fewer people are available to work in the trade and fewer young people are entering the industry. The industry has also faced the problem of plagiarism associated with other knitwear manufacturers all over the world using the 'Shetland' brand, as well as a very competitive global market. Figure 2.2 outlines Shetland's knitwear export markets, and emphasises the importance of international markets and, therefore, transport connections for Shetland goods.

Figure 2.2: Shetland Knitwear Export Markets, 2004



Source: Shetland in Statistics

2.6.13

Construction

Shetland's construction industry has provided high levels of employment in Shetland ever since the oil construction era. Work has been derived from public sector developments, developments associated with the continuing needs of the oil industry, as well as private demand during the relative prosperity of the last 20 years. In 2003, it was estimated that 928 people were employed in the construction sector.

The potential development of a quarry near to Brae is viewed as a future initiative that could impact the transportation network.

Key factors identified by stakeholders in the construction sector consulted as part of the consultation process included the high costs and difficulty of transporting building materials to the islands.

2.6.14

Retail

The growth of mail order and internet shopping is the most significant trend affecting Shetland's retail sector. In a study undertaken in 1998 it was estimated that 60% of Shetland's household expenditure is spent outside Shetland. Shopping outside of Shetland places a great deal of pressure on local shops and a key challenge facing Shetland in the future will be to encourage more household spending within Shetland. Whilst generally welcomed, the recent introduction of schemes to reduce air fares, and provide free ferry trips for concessionary card holders may increase this "retail leakage". Another key issue identified is the need to retain local rural shops as these play a vital role in the community as sources of social interaction and inclusion, and providing access to key services and goods.

2.6.15

Services

The majority of Shetland's population is employed in the service sector. In 2003, for example, nearly 9,000 people were employed in this sector, compared to 5,800 in 1991 and 8,400 in 2000.

The large majority of this employment force is employed by Shetland Islands Council, or the Health Board. A major consideration at this time is the need for the Council to achieve revenue savings. Keeping public service provision in line with available finance, achieving a better balance between public and private sector employment, and ensuring the continuing development of the wealth creating sectors of the economy that the ancillary services depend upon will be a key challenge that will be confronted in the coming years.

2.6.16

Small Scale Enterprises and E Business

The use of Information and Communication Technology (ICT) in order to enable greater flexi-working and remote working is believed to be particularly relevant for economic development in the geographical context of Shetland. By the 31st December 2005, each of the 34 exchanges in Shetland had been enabled for Broadband. It is anticipated that the ability of ICT to reduce the need to travel will increase further in the future, as technology advances and businesses and organisations build up their confidence and trust in the virtues of home-working and flexi-working.

There are particular examples of successful enterprises reliant of broadband in some of Shetland's most remote islands and parts of the Mainland of Shetland.

There are also examples of small scale craft, food and drink enterprises – some of these in the more remote areas of Shetland, such as a brewery and chocolate factory in Unst, as well as similar enterprises located more centrally around Lerwick.

2.6.17

Renewable Energy

There is believed to be great potential in the development of renewable energy initiatives in Shetland. The PURE project in Unst, which is developing hydrogen power, is one example which shows Shetland has the ability to lead the way in the development of renewable energy initiatives.

It is noted that there is a desire to harness a greater proportion of the renewable energy potential of Shetland (wind and marine renewable), and export this via a high capacity power connection to the UK Mainland.

2.6.18

Summary of Issues

- Current economic trends are tending to focus economic development in and around central Shetland, with the exception of initiatives fixed in location – quarries, aquaculture, and tourism.
- Economic development growth could be centred on fish processing, potential oil platform decommissioning, Information Communications Technology (ICT), renewable energy, added value in food and drink, and manufacture and crafts. However, there is the potential for reduction in public sector employment, and at the Sullom Voe Oil Terminal.
- Specific future developments could include oil platform decommissioning, quarries, and fish processing facilities.
- There has been growth in tourism from Scandinavia, and there are potential new markets arising from the new air route from England and Faroe. There is potential growth in some niche markets – eco-tourism, luxury breaks etc.
- Increased use of ICT may increase home and flexi – working opportunities.

2.7 Social Inclusion

2.7.1 *Scottish Index of Multiple Deprivation*

Results from the Scottish Index of Multiple Deprivation (SIMD) 2004 have been analysed in order to investigate the potential problems of social exclusion in Shetland. SIMD uses indicators based on Current Income, Employment, Housing, Health, Education, Skills and Training, and Geographic Access to Services and Telecommunications in order to examine overall deprivation, although the most useful indicator to investigate transport and social inclusion is Geographic Access to Services and Telecommunications.

In short, results suggest that Shetland is the 4th least deprived Local Authority in Scotland.. However, this masks out considerable hardship experienced by many. For example, the results based on the Geographic Access to Services and Telecommunications indicators suggests that whilst zones within the Lerwick area are amongst the least deprived locations in Scotland (i.e. due to the high level of services, such as hospitals, which have been centralised in Lerwick), Northmavine is the 5th most deprived area (datazone) in the whole of Scotland (i.e. due to the lack of services in the area and it's general geographic remoteness). This emphasises the significant contrasts in terms of deprivation that exist across Shetland.

A full list of results for each of the SIMD indicators is presented in Appendix C.

2.7.2 *Recent Research into Social Inclusion and Deprivation in Shetland*

A research report has recently been published (funded by Scottish Executive Quality of Life funding and an external grant from Communities Scotland) to develop understanding of social exclusion and deprivation in Shetland, and other remote rural areas¹⁰. This increased understanding, at a local level, can be used to inform local policy and delivery to better target resources and support and thereby reduce inequalities and genuinely improve the day-to-day lives of people living in Shetland. It can also feed into discussions about how these issues can be addresses at Highlands and Islands and national levels. The research was prompted by views that outcomes from SIMD analysis masked accessibility and social inclusion issues, as these are often experienced by households and persons on an individual, rather than an area basis, in remote rural areas.

A key finding of the research was the relationship between deprivation, social exclusion and access, as the following extract from the report illustrates.

"The greatest issue in terms of access in Shetland is people's inability to afford to run a car (or two cars if a partner has the car each day). Although the public transport system is appreciated, it delivers for full-time commuters and is not able to alleviate access issues for those without a car sufficiently for people to feel they are able to access opportunities. This restricted people's ability to learn; find employment or better employment; purchase more healthy food at a reasonable cost; take part in community events and access social opportunities, for example. Reliance on others for transport is common, hindering people's feeling of independence and increasing humiliation.

This form of exclusion is predominantly felt by women with family responsibilities, particularly those living in remote areas of Shetland, young people, and those with a disability. For the former, lack of childcare and transport to access childcare in other areas augments isolation. For the latter the situation can be particularly acute as they are physically unable to access any public transport.

Access is a fundamental factor in relation to social exclusion and deprivation in Shetland: lack of access to opportunities restricts development in most other areas of people's lives. A section of the Shetland community are unable to take part in opportunities the majority, with a private vehicle and sufficient funds, take for granted. To date, their isolation has meant their needs, including access, have never before been comprehensively captured.

- *If people are unable to run a private vehicle, most opportunities available to them are severely restricted: employment, services, social opportunities, learning and*

¹⁰ Perring, E (2006), *Deprivation and Social Exclusion in Shetland*. Shetland Islands Council, Lerwick. Available from http://www.shetland.gov.uk/datashare/upload/documents/FINALSOCDEP290506_1.pdf

leisure activities, such as swimming, for example. Weekly bus services are available, but it is difficult to get fresh food items and carry home a weekly shop;

- *Many people rely on others for transport. This is humiliating and hinders independence;*
- *Households are not able to afford to use the bus, go to youth club or swimming.*
- *Access is also restricted by a lack of services close by, including childcare and for some, by illness and disability;*
- *The benefits system, particularly national, is complex and confusing to people, with the centralisation from Shetland to Elgin and Clydebank further divorcing people from claiming what they are entitled to;*
- *The relatively high cost of living for essential items, such as food and fuel means that nationally decided benefit levels do not buy so much. Unplanned expenditure, such as an emergency admission to hospital on the mainland can push a household into debt, which they can be paying off for years;*
- *Employment can be difficult to access out-with central areas, particularly for those without private transport. The regular commute to Lerwick for those able to afford transport and for whom employment is 9-5 leaves behind others in the community without the same opportunities;*
- *Meanwhile the opportunity cost of participating in low skilled, low paid jobs is higher when the cost of private transport to access are included, but are a necessary requirement to access shift work in central areas."*

2.8 Summary

This section has attempted to provide some essential background information on the Shetland Islands and has identified the key socio-economic constraints and drivers that must be considered in the development of the transport strategy. For summary purposes, the key constraints and drivers outlined through the analysis above are recapped below:

2.8.1 Spatial Environment

- The physical environment of Shetland – particularly the topography, severe weather and the spatial distribution – could present some constraints to the implementation of transport services on the islands.
- Cultural limitations on opportunities to control the pattern of land use (especially housing) can reduce opportunities to improve accessibility, and reliance on the private car.

2.8.2 Culture

- Shetland has cultural high expectations for improvement. However, the main challenge for the RTP may be in the maintenance of the existing system more than improvements, which may be contrary to population expectations.
- The aspirations of Shetlanders has also changed over time with a move away from traditional lifestyles based on crofting and fishing to more modern lifestyle expectations. This change is one factor leading to increased mobility demands.
- Shetland has always been keen to be independent and to lead the way. This is a further signal of Shetlander's aspirations for a high level of transport services, potentially including the development of fixed links and delivery of innovative forms of public transport services.

2.8.3 Demography

- There is a general trend of population growth around the centre of Shetland (in rural areas readily accessible to Lerwick), some decline within Lerwick, decline in remote rural areas, and decline on the most fragile islands. These trends require consideration in planning for future investment in transport services. Transport services could assist with the regeneration of areas that are in socio-economic decline.
- An ageing and declining population could signal a requirement for transport services aimed at improving accessibility levels of Shetland's older, less mobile residents.

2.8.4 Economy

- Economic development growth could be centred on fish processing, potential oil platform decommissioning, ICT, renewable energy, added value in food and drink, and manufacture and crafts. A potential reduction in employment could be centred on public sector employment and at Sullom Voe Terminal
- Specific future developments that may require consideration from a transport perspective could include oil platform decommissioning, the development of quarries (Brae), fish

processing facilities (Sella Ness), a distillery (Unst/Nesting), and the re-use of RAF Saxa Vord.

- Current economic trends tend to focus economic development in and around central Shetland, with the exception of initiatives fixed in location – quarries, aquaculture, and tourism.
- Potential new markets created by the introduction of a new air route from England could require further transport investment in the future. Shetland also has potential growth in some niche markets, such as eco-tourism and luxury breaks for instance.

2.8.5

Public Sector Support

- Social and economic opportunities are created by the levels of public sector support provided to Shetland;
- There is potential to invest in infrastructure from SIC funds
- There is a constraint in revenue and capital funding availability, locally, nationally and from Europe.

3 Shetland's Transport Network

3.1 Introduction

There are three main categories of transport provision in Shetland: external links, internal transport, and inter-island links. In the following sections, the range of transport services and infrastructure within each of these categories will be outlined. Relevant transport data has also been analysed to provide an indication of trends on each of these transport networks and services. Again, the main drivers and constraints affecting the transport industry will be highlighted. Prior to examining each of the different strands, some wider issues are considered.

3.2 Nature of Shetland's Transport Links

3.2.1 *Issues for the Supply of Transport Services*

A recurring theme for the supply of Shetland's external links, inter-island links, and internal transport provision is the relatively high cost of providing the necessary lifeline transport services. Issues include:

- High capital investment required for vessels, ferry terminals and airports;
- High operating costs due the dispersed population, large distances, and severe sea and weather conditions;
- High recurring capital costs, particularly for the replacement of ferries and their terminals; and
- Relatively small market size for the transport services limiting opportunities for fares income.

Recognising the social and economic importance of the external, inter-island and internal transport links, the majority of transport services are supported by either Shetland Islands Council or Scottish Executive. To date, particular emphasis has been placed by SIC and Scottish Executive on ensuring that the wide range of services are affordable to their users, and as far as practical meet the needs of the communities that are being served.

3.2.2 *Issues for Users of Transport*

Particular issues are faced by users of **lifeline links**. Within Shetland, **lifeline links** include external and inter-island ferries, external and inter-island air services, and even communities linked by a single track road with no alternative route. This has been explored in recent research work commissioned by Highland and Islands Enterprise¹¹. Key issues for users of lifeline links typically include:

- Total travel time – often longer and slower;
- Direct travel costs (fares, petrol) – often higher;
- Out of pocket costs – these can be a necessity, such as the timetable/low frequency forcing a need for over-night stays;
- Schedule delay – there is an additional level of inconvenience associated with low frequencies of services and inconvenient timetabling of departures and arrivals;
- Journey time variability – such as that experienced on single track roads compared to two lane roads, and the impact of weather delays;
- The impact of being dependent on “non-secure” link – such as a ferry or air service - which can be particularly susceptible to disruption or delay. Such delays or disruption can subsequently force significant changes in travel arrangements, and additional costs;
- The longer term impact of being dependent on a “non-secure” link – such as a ferry or air service – with communities fearing future reductions in service levels, increases in fares, or changes in overall quality; and
- Restrictions on choice of onward mode.

¹¹ Ibid, footnote 8

3.3

Increasing Fuel Costs

A second issue currently affecting all forms of transport in Shetland is the recent significant and ongoing increases in fuel costs. This affects private car use, as much as the provision of ferry services, air services and freight transport. The knock on impacts are higher haulage costs and higher costs of personal travel, which impacts on the overall cost of living in Shetland (virtually all consumables being imported), reduces disposable incomes, and reduces the competitiveness and viability of businesses.

There is clearly great uncertainty in predicting future oil prices. The prediction of future oil supplies and reserves are also very contentious. However, some key issues can be highlighted¹², which tend to point towards a trend of increasing oil costs in the future.

- There is significant and ongoing growth in the global demand for oil, particularly from fast growing economies within Asia and Africa;
- There currently appear to be constraints on processing capacity which can affect supply – as highlighted by the spike in oil prices caused by processing disruption during hurricanes in the Gulf of Mexico, and political instability in the Middle East;
- It is reported that oil reserves appear to be increasingly peaking in production; and
- It is also reported that there is a slow down in the discovery of new oil fields.

Offsetting these trends are the development of known oil shale reserves (which is now becoming more economic due to the high price of oil), and investment / improvements in oil processing facilities and refineries.

Whilst such issues are most relevant for national governments and their agencies within energy supply strategies, it is worth highlighting that the impacts of increases in rising fuel prices will be felt sooner, and probably more severely in Shetland, than other areas of Scotland and the UK. One of the most vulnerable areas will be the transport network.

It is noted that Shetland can demonstrate particular opportunities in terms of renewable energy potential (wind and sea), and is also home to an innovative fuel cell research centre (PURE in Unst). These opportunities, combined with the “closed network” inherent on island communities, provides opportunities for pilot projects.

¹² Extract from Guardian; Thursday April 21, 2005. “The end of oil is closer than you think Oil production could peak next year, John Vidal.” <http://www.guardian.co.uk/life/feature/story/0,13026,1464050,00.html>

“What is agreed is that world oil demand is surging. The International Energy Agency, which collates national figures and predicts demand, says developing countries could push demand up 47% to 121m barrels a day by 2030, and that oil companies and oil-producing nations must spend about \$100bn a year to develop new supplies to keep pace.

According to the IEA, demand rose faster in 2004 than in any year since 1976. China's oil consumption, which accounted for a third of extra global demand last year, grew 17% and is expected to double over 15 years to more than 10m barrels a day - half the US's present demand. India's consumption is expected to rise by nearly 30% in the next five years. If world demand continues to grow at 2% a year, then almost 160m barrels a day will need to be extracted in 2035, twice as much as today.

That, say most geologists is almost inconceivable. According to industry consultants IHS Energy, 90% of all known reserves are now in production, suggesting that few major discoveries remain to be made. Shell says its reserves fell last year because it only found enough oil to replace 15-25 % of what the company produced. BP told the US stock exchange that it replaced only 89% of its production in 2004.

Moreover, oil supply is increasingly limited to a few giant fields, with 10% of all production coming from just four fields and 80% from fields discovered before 1970. Even finding a field the size of Ghawar in Saudi Arabia, by far the world's largest and said to have another 125bn barrels, would only meet world demand for about 10 years.

“All the major discoveries were in the 1960s, since when they have been declining gradually over time, give or take the occasional spike and trough,” says Campbell. “The whole world has now been seismically searched and picked over. Geological knowledge has improved enormously in the past 30 years and it is almost inconceivable now that major fields remain to be found.”

He accepts there may be a big field or two left in Russia, and more in Africa, but these would have little bearing on world supplies. Unconventional deposits like tar sands and shale may only slow the production decline.”

See also: BBC report: <http://news.bbc.co.uk/1/hi/business/4077802.stm>

3.4 Carbon Dioxide Emissions

Allied to concern relating to fuel supply and costs, are pressures to stabilise and reduce global carbon dioxide emissions. A long term goal is to reduce UK emissions by 60% by 2050¹³. Scottish Executive has recently confirmed national carbon dioxide reduction targets. Recent work undertaken for the UK government¹⁴ shows that this can be achieved by significant investment in new technology, plus strong travel behaviour change and demand management. Relying on new technology alone, in a UK context, will not achieve the desired target.

In a Shetland context, the amount of carbon dioxide produced is relatively insignificant, and the impact of changes in terms of increased emissions on Shetland's transport system would be relatively minimal. What is important is ensuring that Shetland makes an appropriate, and equitable contribution to national targets, but that Shetland is not disproportionately affected through the application of inappropriate policies.

3.5 Public Sector Support

The Shetland community benefits from relatively high levels of public sector support for transport services. This comes from various sources. Some of the more relevant examples, over and above that typically provided by areas on the Scottish Mainland, are highlighted below.

3.5.1 *Scottish Executive*

- Supports the lifeline Northern Isles ferry service.
- Support freight subsidies on the Northlink RoRo services
- Plans to support freight subsidies for LoLo service.
- Provides concessionary "islander" discounts for the air service, and the ferry service.
- Provides additional GAE support to assist with the operation of the inter-island ferry service.
- Provides Rural Transport Funding, which supports a large number of rural bus services, dial a ride schemes, the integrated North-Isles bus link, and community ferry hires.
- Supports the operation of Highlands and Islands Airports Ltd, which operate Sumburgh Airport.
- Provides discretionary capital allocations to Shetland Transport Partnership directly, and previously through HITRANS. In the past, this funding has been used to implement schemes such as the inter-islands ferry service Variable Message Signs. Currently, this funding is planned to improve marshalling facilities at Ullsta Ferry Terminal on Yell.

3.5.2 *Shetland Islands Council*

- Provides revenue support for the operation of the inter-island ferry and air service network, maintenance of the roads network, and the bus services.
- Supports a capital programme of transport investment, which has included road investment, improvements to Sumburgh Airport runway, and Ferry and Terminal replacements.

3.5.3 *Shetland Islands Council General Fund Reserves*

- These comprise the Capital Fund, Repairs and Renewals Fund and Reserve Fund.
- These funds were principally derived from the oil industry, and are invested internally (funding the Housing Revenue Accounts capital expenditure) and externally via fund managers (principally in bonds, equities and cash in accordance with the various investment restrictions which apply to each fund).
- The funds have been used, over the years, to fund capital expenditure, repairs and renewals, and a range of community and economic development projects and programmes.
- In recent years these funds have provided all the funding for the Council's General Fund Capital Programme, and have also met General Fund revenue deficits. The Council's current policy objectives are to minimise their use to support revenue deficits and concentrate their use on investments in infrastructure in the community. The Council has also set a floor level for these reserves of £250 million, below which the Council does not intend to go. They stood, at 1 April 2005, at £319 million.

¹³ Department for Trade and Industry (2003), *Our Energy Future: Creating a Low Carbon Economy*. DTI, London.

¹⁴ Hickman, R; Banister D (2006), *Looking over the Horizon – Visioning and Backcasting for UK Transport Policy*. Report for Department for Transport, London.

3.5.4

NHS Shetland

In addition to the provision of health care, notable elements of support for the transport service, related to need in Shetland are as follows.¹⁵

- Travel Costs – NHS Scotland's Highlands and Islands Travel scheme covers travel and accommodation costs for patients travelling to specialist services for out-patient, day or in-patient care. Escort costs are provided in some (but not all) instances. Travel to primary care and community services within Shetland is not covered. The scheme is supported locally by a patient travel office, and a discharge liaison nurse.
- Air Ambulance Service – Provides medically equipped and staffed fixed wing aircraft, supported by helicopters for island services.

3.6

External Links - Introduction

The following sections detail the principal passenger and freight transport services that link Shetland to the UK Mainland, and also to Scandinavia. These principally operate to and from Sumburgh Airport, and Lerwick Harbour.

Before looking at trends on air and ferry services, it is to be stated there are constraints on the ability of the Shetland Transport Strategy to directly influence the provision of external links since these services are operated on a commercial basis by private companies, or are tendered by the Scottish Executive. However, the importance of efficient, reliable and affordable external links to Shetland's economic and social well-being make these external links an important part of the Shetland's transport strategy.

3.7

External Links - Air Services

3.7.1

Airports

Scheduled air services to UK Mainland and Scandinavia are provided from Sumburgh Airport, operated by the state-owned Highlands and Islands Airports Ltd (HIAL), in the south of Shetland Mainland.

Work has now been finalised on an extension to the runway at Sumburgh, which improves the operational reliability of the airport, by allowing planes to take off and land with full loads in a wider range of weather conditions than present. As part of the runway extension works, Sumburgh Airport has also introduced a new instrument landing system (ILS), which is an electronic surveillance system that allows aircraft to get 300 feet from the ground before the pilots have to see the airfield.

There is also an airport at Scatsta, which is operated by the oil industry. Current development work will allow it limited capability to handle diversions of scheduled services from Sumburgh, although there are certain logistical difficulties in achieving this. Scatsta does not have ILS, but instead uses surveillance radar approach (SRA) which allows aircraft to come in as low as 535 feet before visibility is required for landing.

3.7.2

Air Services

Principal flights to the UK Mainland are operated by Loganair who fly to Aberdeen, Edinburgh, Glasgow, Inverness, and Orkney, using Saab 340 turbo-prop aircraft. Flights are integrated with connections to/from London Heathrow, Birmingham, and Manchester. Seasonal flights connect Shetland to Faroe, London Stansted and (historically) Norway.

During weekdays, the current timetable includes the following flights:

- Aberdeen - five daily direct services. 1 hour flight. (drops to four return flights in winter)
 - Departs Shetland at 08.00, 11.15, 14.00, 17.00, 20.00.
 - Departs Aberdeen at 06.30, 09.30, 12.30, 15.30, 18.30.
- Edinburgh - two daily direct services. 1 hr 30 min flight.
 - Departs Shetland at 07.30, 15.30
 - Departs Edinburgh at 09.40, 17.40
- Glasgow – one daily direct service. 1 hr 30 min flight
 - Departs Shetland at 11.40

¹⁵ NHS Shetland (2005), *NHS Shetland 2020 Vision*. NHS Shetland, Lerwick

- Departs Glasgow at 13.30
- Inverness – two daily services, via Kirkwall. 1 hr 40 min flight
 - Departs Shetland at 07.35, 15.35
 - Departs Inverness at 09.40, 17.40
- Kirkwall – two daily direct services. 35 min flight. Continues onto Inverness.
 - Departs Shetland at 07.35, 15.35
 - Departs Kirkwall at 10.45, 18.45

Service levels are slightly reduced and rearranged at weekends.

Flightline, on behalf of the north sea oil industry, currently operate regular shuttle flights between Aberdeen and Scatsta, utilising a fleet of three BAe 146 jets. From Scatsta, the oil workers are flown by helicopter to the oil platforms. Whilst these flights are principally restricted to oil industry personnel, family members of oil industry personnel working in Shetland can obtain a limited number of seats on these flights, dependent upon availability, subject to short term changes, at a cost less than the Loganair service.

The summer of 2006 has also seen the introduction of a twice weekly summer air service from the Faroe Islands to Shetland, and from Shetland to London Stansted, operated by Atlantic Airways. Historically, (although not in 2006), there has been a summer air service connecting Shetland to Norway operated by Wideroe.

Highland Airways operate passenger flights from Sumburgh to Inverness – although only from Shetland - as the incoming flight carries newspapers from Inverness. There is one morning flight everyday, Monday to Thursday, and also one mid-morning flight on Saturdays and Sundays.

Ben Air operate a daily return freight service to Sumburgh from Aberdeen on behalf of the Royal Mail.

3.7.3

Air Service Trends

Table 3.1 shows that passenger numbers from Sumburgh Airport decreased between the late 1970s and 2004. The major reason for this decrease is accounted for by the transfer of oil traffic to Scatsta airport.

Recent statistics published by HIAL¹⁶ state that passenger numbers on scheduled services have increased at Sumburgh, particularly since Loganair took over the operation of flights to Shetland. For example, in the month of June 2005 there were 11,334 passengers through Sumburgh Airport, but in June 2006, passenger numbers had increased by 13.6% to 12,879 passengers.

Table 3.1: Historic Passenger and freight levels at Sumburgh Airport

	Total Passengers	Fixed Wing Scheduled Passengers	Charter Passengers And Others	Helicopter Passengers	Freight (kgs)
1971	46,994	N/A	N/A	N/A	440,000
1976	250,778	78,654	84,111	88,013	1,574,338
1978	685,492	90,601	323,151	271,740	1,950,287
1981	541,761	76,583	232,389	232,519	3,487,834
1986	239,744	63,200	77,805	98,739	1,409,284
1991	473,626	76,841	182,377	214,408	1,448,769
1996	423,476	125,744	137,384	160,348	1,611,102
2001	168,281	112,146	14,824	41,311	981,475
2003	127,965	105,530	4,413	17,922	1,046,013
2004	123,163	103,001	4,888	15,274	1,073,614

Source: Highlands and Islands Airport Ltd. Shetland in Statistics 2005.

With regards to the amount of freight transported through Sumburgh Airport, this appears to have increased gradually over the last few years. For example, in 2001, 981,000kgs of freight

¹⁶ Highlands and Islands Airports (2006), *First Quarter Results See 18% Passenger Growth in HIAL Airports*. HIAL, Inverness.

was transported through Sumburgh Airport, but this had increased to 1,046,000kgs by 2003 and to 1,073,000kgs in 2004.

3.7.4

Air Fares

One problem raised in relation to flights to and from Shetland during the consultation period was said to be the high and variable range of air fares. Table 3.2 shows typical air fares for return flights from Sumburgh to Aberdeen, Edinburgh, Glasgow, Inverness, and Orkney, according to the period in which the tickets were booked in advance, for non-island residents.

Table 3.2: Typical costs for return flights from Shetland to Other Scottish Airports

Sumburgh to...	Aberdeen	Edinburgh	Glasgow	Inverness	Orkney
1 day	£252.10	£375.60	£375.60	£315.40	£191.40
1 week	£188.10	£305.60	£305.60	£315.40	£191.40
1 month	£138.10	£305.60	£305.60	£315.40	£191.40
6 months	£123.10	£305.60	£305.60	£315.40	£191.40
11 months	£123.10	£305.60	£305.60	£315.40	£191.40

Source: British Airways website www.ba.com, accessed July 2006

The above fares support the arguments made during consultation regarding the expensive and variable nature of air fares to and from Shetland, particularly for “last-minute” arrangements, and particularly to Edinburgh, Glasgow and Inverness.

In February 2006, the Scottish Executive announced plans to reduce air fares by an estimated 40 per cent on flights (excluding taxes etc) from some of Scotland’s most remote areas, including Shetland, but for island residents only. This move is believed to be one that will further stimulate air passenger traffic growth from Shetland in the future. The additional demand for flying that is likely to be generated through the islander air fare discounts could be a key driver in ongoing route development from Sumburgh.

The issue of high air fares, highlights the wider constraint facing transport in Shetland. In a situation where passenger flows are relatively low, and fixed costs of operation are reportedly relatively high, it is very difficult to provide commercially viable services at fares which are in line with islander and visitor expectations, despite the lifeline nature of the service. One factor in relation to the fixed costs is the difficulty in maximising the utilisation of the aircraft with a high number of relatively short regional flights. A further factor which does not assist in the provision of lower fares is the monopoly exercised by BA/Loganair on the Sumburgh to Scottish Mainland routes.

3.8

External Links – Ports

Shetland benefits from three recognised ports – Lerwick, Scalloway, and Sullum Voe. Each is considered in turn below.

3.8.1

Lerwick

Lerwick is managed and operated by Lerwick Port Authority (LPA). The port was formed in 1877 by an Act of Parliament as Lerwick Harbour Trust. Currently, the port is run on a wholly commercial basis, but are owned by and run for the local community. This port is the principal port for UK Mainland and Scandinavian Ferries.

Lerwick Harbour is a modern port, with versatile facilities serving a wide range of users. With two entrances, it is open to shipping in all weathers and operates around-the-clock. As the principal port for Shetland, Lerwick is a vital component in the islands' economic infrastructure. At the crossroads of the North Sea and the North-east Atlantic, it is also Britain's most northerly commercial port. Since the 1960's, almost £50 million has been invested in the redevelopment of the port which handles around 5,500 vessels annually.

Particular features of the harbour are:

- A major fishing port
- A key centre of marine support for the offshore oil & gas industry
- An important ferry port, including roll-on roll-off services for passengers and freight on Scottish and international routes
- A freight facility for general cargo
- A popular port-of-call for cruise ships and yachts

3.8.2 *Scalloway*

Scalloway is an important fishing harbour situated on the West side of the Shetland Isles. The harbour is nominally open in all weathers but movements may be delayed if conditions are unsuitable. The harbour is managed and operated by Shetland Islands Council's port operations. The harbour is frequently used by vessels associated with the aquaculture industry, offshore support vessels, survey vessels, and general cargo vessels.

3.8.3 *Sullom Voe*

The port of Sullom Voe is a major deep water harbour and is owned and operated by Shetland Islands Council as Harbour Authority.

The harbour is principally concerned with the transfer and shipment of crude oil, and liquid petroleum gas (LPG) associated with the adjacent oil terminal. The harbour accepts vessels between 140 metres LOA and 365 metres LOA as a matter of routine. Subject to careful controls the largest vessels in the world are likely to be accommodated. Four jetties provide opportunity for LPG carriers to load to a maximum draft of 16.8 metres and crude carriers to load to a maximum draft of 24 metres.

In addition to liquid bulk and LPG cargo, the port can handle quarried rock and general, dry, bulk, ro-ro and containerised cargo in relatively small vessels working at shallow draft jetties.

3.9 **External Links – Ferry Services**

3.9.1 *Passenger Ferry Services*

There are currently two external passenger ferry services that operate from Shetland; NorthLink Ferries and Smyril Line.

NorthLink Ferries currently operate Shetland's principal ferry link between Lerwick and Aberdeen, providing passenger/ro-ro (RoPax) facilities for this 12 to 14 hour voyage. There are seven passenger sailings in each direction per week, using MV Hjaltland and MV Hrossey. Some sailings – three per week southbound and four per week northbound – are routed via Kirkwall in Orkney.

The NorthLink vessels have the capacity to accommodate up to 600 passengers and approximately 200 cars. There are 100 cabins on board, 44 outer twin berths, 52 inner four berths, and 4 disabled berths, providing a maximum berth capacity of just under 300. The berths are supplemented by reclining seats.

For the 2006 summer timetable, operating between May and September, Smyril Line operates MV Norrona on routes between Lerwick and Hantsthom (Denmark), Bergen (Norway), Torshavn (Faroe Isles) and Seydisfjordur (Iceland). This service brings visitors to Shetland from Scandinavia, and a limited amount of freight. The service currently visits Lerwick twice a week, directly linking to Torshavn and Bergen. The proposed 2007 summer timetable would see the Smyril Line service call into Lerwick fortnightly.

It is also to be noted that a number of cruise ships and small vessels call into Shetland's ports and harbours each year.

3.9.2 *Ferry Service Trends - Passengers*

Since NorthLink took over the running of the ferry service to Aberdeen in 2002 from P&O Scottish Ferries, passenger levels to the Shetland Islands (and also Orkney) have increased significantly. In total, the number of passengers carried on the Aberdeen to Lerwick service has increased from approximately 62,500 in 1996 to nearly 98,000 in 2004. This is illustrated in Table 3.3.

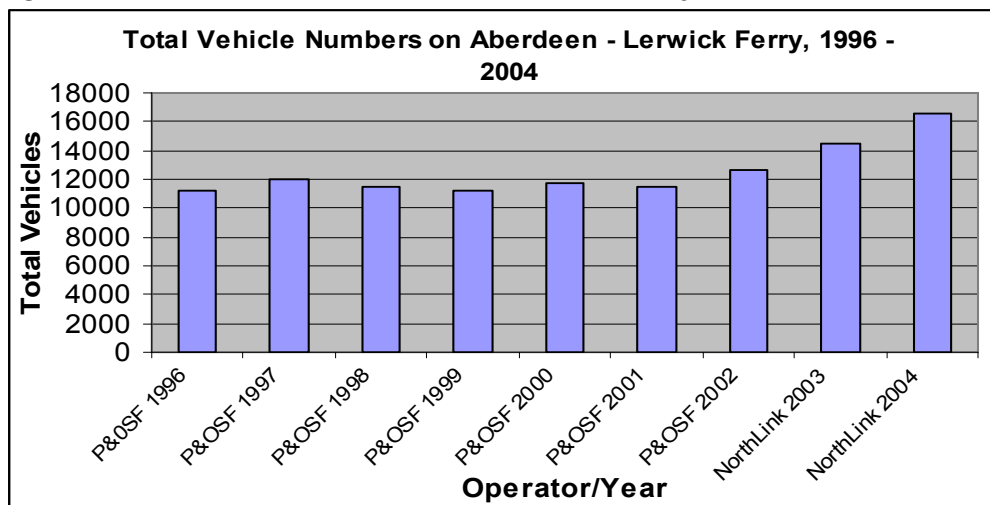
Another notable observation is that the NorthLink ferry service experiences a high degree of seasonality in demand. Indeed, the lack of cabin availability during peak periods (i.e. school holiday periods, particularly June to August) was one of the most common problems raised during the consultation process.

Table 3.3: Passenger numbers on Aberdeen to Lerwick Ferry service, 1996 - 2005

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
1996	1695	1201	2329	5410	6238	7846	11693	10562	6607	4525	1981	2474	62,561
1997	1966	1525	2594	4603	6430	9025	12422	11135	6670	4557	1829	2388	65,144
1998	2118	1376	2576	4403	6151	10298	8327	10298	5742	4750	2256	2539	60,938
1999	2196	1476	2631	4868	5876	7292	10691	11375					46,405
2000	2156	1360	2787	4680	6006	8076	10242	9489	5339	4484	2295	3068	60,002
2001	2211	1576	2453	3951	5540	7784	11100	9908	5629	5542	2246	3420	61,360
2002	2601	1709	3318	4045	6057	8813	10827	9991	6583	5758	2665	3251	65,618
2003	3098	2682	4503	6191	6654	10582	10537	12277	7185	7791	4825	4860	81,185
2004	4293	2989	6014	7970	7967	11071	15393	13752	8214	9025	5480	5752	97,920
2005	5129	3988	6329	8937	8390	11281							44,054

Source: Scottish Executive *Data only available for first six months of year.
Operations changed from P&O to Northlink in 2002.

The number of passengers taking their cars on the ferry has also increased substantially since NorthLink began operation of the North Isles ferry service. Vehicle numbers are shown in Figure 3.1. For example, in 1996 there were just over 11,000 vehicles on the Northern Isles ferry service, but by 2004, there were over 16,500 vehicles.

Figure 3.1: Vehicle numbers on Aberdeen to Lerwick Ferry service, 1996 - 2004

Source: Scottish Executive

Passenger numbers for the Smyril Line service suggest that this has been a popular service for visitors and Shetlanders. Table 3.4, shows that the number of passengers arriving in Lerwick increased by over 1000 between 2003 and 2004, which would have had benefits for the tourism industry in Shetland.

Table 3.4: Passenger numbers on Smyril Line (Summer Only service)

Passengers	2003	2004
Lerwick Inbound	5,868	6,965
Lerwick Outbound	6,407	7,302

Source: Smyril Line, Shetland in Statistics 2005

3.9.3

Ferry Service Costs – Passengers

Table 3.5 provides an indication of costs for travel on the NorthLink ferry services. As stated in consultation, it can be relatively cheap to travel on the NorthLink service, if prepared to travel without a cabin. For example, an adult prepared to sleep in the reclining chairs and go without a cabin can expect to pay between £20 and £30 (single ticket) depending on season. However, booking a cabin can add a considerable expense to the journey, particularly if booking a premium outer cabin. It is also notable that it is cheaper to book an Inner 4 berth cabin than an Outer 2 berth cabin. As stated during consultation, it is felt that this leads to single occupancy of 4 berth cabins, which removes valuable accommodation for many, especially during the peak periods.

Islander concessionary rates are available on the NorthLink service for residents of Shetland (and Orkney) offering a 30% saving on full fares - although these do not apply to cabin charges. Additional savings – a further 25% on the special islander rate – are offered to senior citizens living in Shetland and anyone in full time education. In addition, during 2006, following the introduction of the National Concessionary fares for over 60s operated by Transport Scotland, senior citizens living in Shetland have been given the added entitlement of two free return trips, including a berth in a cabin (outwith high season).

Table 3.5: NorthLink fares, Aberdeen – Lerwick.

Tariff 2006 (All fares Single Passage)	Aberdeen - Lerwick		
	Low Season	Mid Season	Peak Season
PASSENGERS			
Adult Single	£20.40	£25.90	£31.20
Child Single (age 5-15yrs)	£10.20	£12.95	£15.60
Infant (age 0-4yrs)	Free	Free	Free
VEHICLES			
Car (<6m)	£82.80	£105.50	£111.30
Bicycle	Free	Free	Free
Motorcycles/Scooters	£17.50	£19.00	£21.10
CABINS (Per cabin, Per journey)			
Premium Outer 2 berth	£76.00	£97.10	£105.50
Outer 2 berth	£54.90	£76.00	£84.40
Inner 4 berth	£52.80	£73.90	£82.30
CABIN SHARE SCHEME			
Berth in outer 2	£27.50	£38.00	£42.20
Berth in inner 4	£18.00	£25.40	£27.50

Source: NorthLink Ferries

3.9.4

Freight Ferry Services

In addition to nightly roll-on roll-off passenger/freight services to Aberdeen, NorthLink also operates a freight-only roll-on roll-off vessel to Aberdeen. NorthLink currently deploy MV Hascosay, and MV Clare on the route. The two vessels currently provide four departures from Shetland to Aberdeen each week (one via Orkney), and four from Aberdeen to Shetland each week (one via Orkney). This service is supplemented by the lease of a specialist livestock vessel during the Autumn.

The Streamline Group also operate cargo service that competes with the NorthLink cargo service. This service is a wholly commercially run load-on load-off container service, which carries cargo to and from Shetland by container. The Streamline service operates between Aberdeen and Lerwick, and Aberdeen and Orkney.

3.9.5

Ferry Service Trends - Freight

There are current difficulties in sourcing reliable trend data for freight shipped to and from Lerwick on the existing ferry services. Historic information is presented in Table 3.6 for when the Northern isles service was operated by P&O.

Table 3.6: Freight Services Aberdeen to Lerwick (Figures expressed in lane metres)

	1991	1986	1991	1996	1998	1999
Commercial Vehicles	24,327	14,368	10,899	12,038	12,715	12,006
Commercial Trailers	26,959	25,745	56,255	64,244	86,049	79,468
Unaccompanied Cars	3,941	4,512	5,383	6,213	5,934	6,184

Source: P&OSF, Shetland in Statistics

3.9.6

Ferry Service Costs – Freight

Table 3.7 presents the 2006 freight rates on board NorthLink ferries. Freight costs were highlighted as a constraining factor to some of Shetland's industries since Shetland's industries have to pay more for the transport of freight such as building materials and agricultural feed than competitors on the Scottish Mainland. The recent introduction of a 25% freight subsidy from the Scottish Executive can be seen as a way of helping local businesses compete more effectively with Mainland counterparts.

Table 3.7: NorthLink Ferries, 2006 Single Journey Freight Rates (prices per lane metre excl. VAT)

Route	Advance Booking/ Standby		3 Day Premium	
	self prop	drop trailer	self prop	drop trailer
Lerwick - Aberdeen	£40.10	£40.60	£44.30	£48.55
Lerwick – Kirkwall	£24.25	£26.40	£27.45	£32.70

Source: NorthLink Ferries

3.10

Inter-Island Links

This section outlines transport trends related to the network of inter-islands air and ferry services that operate in Shetland. In addition to the trends offered within this scoping study, it is to be noted that a key piece of work is being progressed which involves a comprehensive analysis of trends on the inter-island ferry network. This work specifically examines passenger and vehicular trends on the inter-island ferry network, as well as analysis of capacity, in order to inform the appraisal of potential options for the future deployment of Shetland's inter-island ferries. Key findings from this piece of work will be used during the appraisal of inter-island ferry options.

3.10.1

Inter-Island Ferry Service

Shetland Islands Council currently operates a fleet of 13 ferries to provide ferry services to 9 islands with a total population of approximately 3,400 people. The services operate from a total of 16 terminals. Seven ro-ro vessels operate the services to the islands of Yell (2), Unst and Fetlar (2), Whalsay (2) and Bressay (1). Two ro-ro ferries are kept as spares for overhaul and breakdown relief duties. Two ro-ro ferries operate the services to Out Skerries and Papa Stour, whilst two freight vessels carry loose cargo and up to 12 passengers to Fair Isle and Foula.

There are a number of specific issues relating to the inter-island ferry service.

- The requirement to replace a significant number of the existing fleet, due to life expiry (i.e. age greater than 20 to 25 years), and possible enforcement of stricter maritime legislation arising from the implementation of MARPOL and SOLAS regulations.
- New legislation governing the construction of new vessels has meant that replacement vessels require to be larger, in order to deliver same level of capacity, due to requirement for

passenger accommodation to be above vehicle deck. This can require substantial consequential investment in replacement terminals.

- Many of the existing terminals were designed for the first generation of ferries, introduced during the 1970s. Many are at the limits of their operation due to the increased size of vessels using them, and consequential increased berthing pressures. Recent surveys have confirmed the need for remedial work at a number of the terminals.
- Any terminal and vessel replacement programme needs to be undertaken in a co-ordinated manner, to ensure continuation of service, and wider network benefits.
- It is known that there is a relatively urgent requirement to address peak period vehicle deck capacity issues on Whalsay and Bluemull Sound, and also address difficulties related to the timetabling of the services to Unst and Fetlar on Bluemull Sound.
- There are additional demands to address ferry service reliability concerns on Fetlar and Skerries, the planned replacement of the Bressay Ferry with a bridge, service development options for Papa Stour, tendering of the service on Foula, and continued maintenance of service to Fair Isle.
- There are future uncertainties due to the future imposition and interpretation of new and forthcoming regulations and legislation.

3.10.2

Inter-Islands Ferry Service Costs

The inter-islands ferry network costs approximately £13.5 million in revenue funding to Shetland Islands Council each year. The ferry service is a lifeline service to many islanders and in some cases is the only way to transport passengers, vehicles and goods to and from the islands. However, the high costs of maintaining these services to islands with small populations, which are often experiencing population decline, is viewed as an issue that the transport strategy must consider. A key challenge will be to meet the needs of the communities in a manner that is cost effective and sustainable.

There is a specific issue regarding the capital affordability of any replacement programme for both vessels and terminals.

3.10.3

Inter-Islands Ferry Service Trends – Passengers

SIC are currently undertaking a detailed analysis of patronage on each of the inter-island ferry services over the past few years. The findings of this analysis will be used to inform the development of future options for the inter-island ferries.

Table 3.8 provides details of passenger numbers on selected ferry routes across Shetland, based on ticketing information. On each of the services, it is shown that passenger numbers have increased. This can be explained by a number of reasons, such as the growing dominance of Lerwick for commuter purposes, or simply that people have higher standards of living and can now afford to travel more frequently. It also reflects the improving frequency, length of operating day and capacity of ferries in the Shetland service fleet over the years.

Table 3.8: Passenger numbers of inter-island ferry services.

Ferry Route	1976	1986	1991	1996*	2001	2003	2004
Yell	62,626	96,384	113,897	193,386	192,661	221, 923	231,249
Unst/Fetlar	33,480	40,605	65,608	112,852	110, 688	129,452	145,350
Bressay	71,615	96,849	135,447	219,619	180,675	194,512	212,957
Whalsay	23,110	45,888	67,385	144,606	138,327	141,497	154,350
Total	190,811	279,706	382,337	670,263	622,351	687,384	743,906

Source: Shetland in Statistics

Table 3.9 shows vehicle numbers carried on selected inter-island ferry services in Shetland. Trends illustrate that there has been an increase in vehicle numbers on routes over the years.

Table 3.9: Vehicle numbers on inter-island ferry services.

Ferry Route	1976	1986	1991	1996*	2001	2003	2004
Yell	33,333	65,264	89,041	97,180	100,889	117,130	123,604
Unst/Fetlar	16,920	28,202	51,816	52,034	56,459	67,246	79,808
Bressay	14,817	31,958	50,272	66,612	58,829	68,782	71,230
Whalsay	10,117	31,660	48,911	64,212	62,748	66,373	72,885
Total	75,197	157,084	240,040	280,038	278,925	319,531	347,527

*Prior to 1995 the fare gathering system did not record non-fare paying vehicles and passengers. Source: Department of Infrastructure Services, SIC.

3.10.4

Inter-Islands Ferry Fares

The tables below illustrate fares on each of the inter-island ferry services for 2006/07. It is to be noted that fares on the Bluemull Sound services (Yell to Unst, Unst to Fetlar, and Fetlar to Yell) have been suspended and services are free both for passengers and vehicles in response to the recent closure of RAF Saxa Vord in Unst until April 2008.

Table 3.10: SIC Inter-island fares: Mainland to Bressay Whalsay, Yell

Passenger	Fares (£) (All fares are return unless otherwise stated)
Adult – return	3.00
10 Return Journey Ticket	14.20
Children up to 16 – Return	0.40
10 Return Journey Children's Ticket	2.40
Concessionary SIC Pass Holders	No Charge
Vehicles - Fares Include Driver	
Motorcycles – Return	5.40
Vehicles up to and including 5.50m Return	7.00
10 Return Journey Ticket	56.00

Source: SIC

Table 3.11: SIC Inter-island fares: Mainland to Skerries, Papa Stour

Passenger	Fare (£) (All fares are single unless otherwise stated)
Adult	2.60
20 Journey Ticket	28.50
Children up to 16	0.20
20 Journey Children's Ticket	2.40
Concessionary SIC Pass Holders	No Charge
Vehicles - Fares Include Driver	
Motorcycles – Return	2.70
Vehicles up to and including 5.50m Return	3.50
10 Return Journey Ticket	56.00

Source: SIC

Table 3.12: SIC Inter-island fares: Mainland to Fair Isle, Foula

Passenger	Fare (£) (All fares are single unless otherwise stated)
Adult	2.60
20 Journey Ticket	28.50
Children up to 16	0.20
20 Journey Children's Ticket	2.40
Concessionary SIC Pass Holders	No Charge
Vehicles - Fares Include Driver	
Motorcycles – Return	7.00
Vehicles up to and including 5.50m Return	12.50

Source: SIC

3.10.5

Inter-Islands Air Service

The inter-islands air services are currently operated by Directflight Limited from a base in Tingwall, with scheduled flights operating to Foula, Fair Isle, Skerries and Papa Stour. DirectFlight began operation of the service on the 01 August 2006, taking over from Loganair who had previously operated the service. The inter-islands air service is provided by an eight-seater Islander aircraft.

Tingwall airport is owned and operated by Shetland Islands Council. It is recognised that in the future, the Civil Aviation Authority may seek the upgrading of certain facilities at the airport.

The services are well-received by all islanders that use them. The island airstrips are owned and operated by local Airstrip Trusts with grant funding from the Council. The licensed airstrip at Fair Isle is owned and operated by the National Trust for Scotland. In addition, there are airstrips on Whalsay and Unst. The Whalsay airstrip is used by chartered aircraft but the Unst airstrip has been closed and is unlicensed following a downturn in usage, but is maintained for emergencies / ambulance flights. Current service patterns are as follows:

- Fair Isle
 - Two Tingwall – Fair Isle returns, Mon, Wed, Fri.
 - Summer only Saturday service, Tingwall - Fair Isle – Sumburgh - Fair Isle - Tingwall.
- Out Skerries
 - One Tingwall – Out Skerries return, Mon, Wed.
 - Two Tingwall – Out Skerries returns, Thurs
- Foula
 - One Tingwall – Foula return, Mon, Tues
 - Two Tingwall – Foula returns, Wed (summer only), Fri
- Papa Stour
 - Two Tingwall – Papa Stour returns, Tues

Table 3.13 provides an indication of present fares on the inter-island flights.

Table 3.13: Inter-island air service fares

	Adult		Youth (12-24)		Child (2-11)	
	1 way	Return	1 way	Return	1 way	Return
Fair Isle	£30.00	£60.00	£22.50	£45.00	£15.00	£30.00
Foula	£30.00	£60.00	£22.50	£45.00	£15.00	£30.00
Papa Stour	£25.00	£50.00	£18.75	£37.50	£12.50	£25.00
Skerries	£25.00	£50.00	£18.75	£37.50	£12.50	£25.00

Source: SIC

An island resident discounted return fare is applicable as follows:

- From Fair Isle and Foula to Tingwall = £36
- From Papa Stour and Skerries to Tingwall = £24

3.10.6

Inter-Island Air Service Trends

Consultation with residents on some of Shetland's smaller islands, particularly Fair Isle and Foula, revealed the high dependency placed on the inter-islands air service as a lifeline link. Unlike other islands in Shetland where the ferry is the main form of passenger transport to Shetland Mainland, the air service is the main passenger travel mode on Fair Isle and Foula, and an important link for Skerries. Comments from consultation with these groups highlighted a desire for additional flights to these islands.

The specific issue for Fair Isle was flights being full to capacity during certain periods of the year, due to the island's popularity with bird spotters and other tourists. This is often compounded as during the busy periods of the year, the island can be affected by fog.

The specific issue for Foula related to an additional return trip opportunity during the week, as well as cost consideration. For Skerries, Foula and Fair Isle, it was noted that the ferry and the air service very much played a complementary role to each other. Whilst Papa Stour had a limited frequency of service, it was believed that this opportunity to fly to Tingwall was valued.

Table 3.14 provides passenger data on inter-island flights to the smaller isles in Shetland.

Table 3.14: Patronage levels on the Inter-islands air service.

Airfield	1997/98	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Fair Isle	2314	2078	2071	2233	2340	2299	2589
Foula	1098	1282	1307	1400	1731	1406	1531
Papa Stour	254	206	283	305	502	325	330
Skerries	586	848	997	993	907	907	813
Total	4,252	4,414	4,658	4931	5480	4937	5263

Source: SIC

3.11

Internal Transport - Introduction

3.11.1

Characteristics

There are a number of important issues that shape the provision of internal transport within Shetland.

- It appears that changing lifestyle patterns in Shetland are leading to higher levels of mobility than in previous generations.
- There is a dispersed population pattern across Shetland.
- It is very difficult to provide a viable rural public transport service that matches the population's mobility expectations with the costs and practicalities of such a level of provision. This is despite a rural public transport service that is arguably the most comprehensive in rural Scotland.
- Outwith Lerwick, a car is considered a necessity. People without access to a car outwith Lerwick are likely to suffer social exclusion.
- Changing patterns of lifestyle, more affordable motoring, an increasing population in the more accessible rural areas, and changing patterns of employment and service provision, have led to relatively high increases in car use.
- The increases in car use recorded locally however do not appear to be creating significant congestion or environmental problems, and are small in absolute terms.
- The range of factors above lead to a high level of car dependency for those living outwith Lerwick.

3.12

Internal Transport – Roads and Traffic

3.12.1

Road Network

In total, there are 1,045 kilometres of public road in Shetland, with almost half being unclassified road. There are no trunk roads in Shetland.

Table 3.15: Pubic Road Lengths (as at 1st April) in Shetland by Class, 2004

						Total (kms)
	Principal roads	B roads & non-principal A roads	C roads	Un-classified	Total	
Shetland Isles	196	190	199	460	1,045	1,045

Source: Scottish Transport Statistics, No.24, Scottish Executive, 2005.

The 'spine roads' comprise:

- The A970 Lerwick to Sumburgh road, which is a modern 2-lane road throughout.

- The A970 Lerwick-Brae-Hillswick Junction, which has been extensively improved. Approximately 1km at Girsta and 3.5km in Northmavine have been rebuilt recently.
- The A970 and B9073 Lerwick-Scalloway links have been thoroughly upgraded. Apart from linking two main settlements, they also provide a means of bypassing Lerwick.
- The A968 extending from Voe to the ferry terminal at Toft and onwards through Yell and the ferry terminal at Gutcher up to Baltasound, has all been rebuilt since 1970.
- The A971 from Lerwick to the West Mainland has an outstanding, but imminent, improvement at Haggersta, and further reconstruction toward Walls is likely. These works would complete the modernisation of the spinal route.
- B9071 Voe to Laxo, improved throughout.
- B9076 Brae-Firth via Graven, improved throughout.

In the rural areas, the main physical constraints to the ongoing development of the road system are land ownership issues, managing environmental impacts, suitability of the underlying ground, and topographical constraints.

It is noted that there is a considerable length of un-adopted private roads, providing vehicular access to numerous crofts and houses. It is noted that local community councils manage the provision of annual grants for the maintenance of these roads and tracks.

3.12.2

Road Maintenance

Table 3.16 shows the level of network road condition in Shetland compared to the Orkney Islands and the Scotland total for 2004/2005. Red equates to the percentage of roads in Shetland where improvements should be considered, whereas roads given amber status are those that require further investigation. In short, the table illustrates that, overall, the conditions of roads in Shetland are good, and typically better than the Scottish average. The 2005/06 information indicates that Shetland's roads are in the best condition in Scotland.

Table 3.16: Local Authority Road Network Condition

	A Roads Condition (%)		B Roads Condition (%)		C Roads Condition (%)		Unclassified Roads Condition (%)		All Roads Condition (%)	
	Red	Amber or Red	Red	Amber or Red	Red	Amber or Red	Red	Amber or Red	Red	Amber or Red
Shetland Isles	2	22	9	44	4	30	8	36	6	33
Orkney Islands	1	21	6	47	0	5	3	15	3	21
Scotland	6	31	10	43	5	31	15	50	11	42

Source: Scottish Transport Statistics, No.24, Scottish Executive, 2005.

A specific issue in relation to the minor road network are single track rural roads that have become widened through successive re-surfacing treatments. However, the "widened" edges do not have the benefit of full structural foundation, and often fail if used by HGVs.

Another issue facing the maintenance of the road network is where roads have been built on poor ground conditions. Both of these issues have to be addressed by a new programme of heavy reconstruction works carried out under the Capital Rolling Programmes.

3.12.3

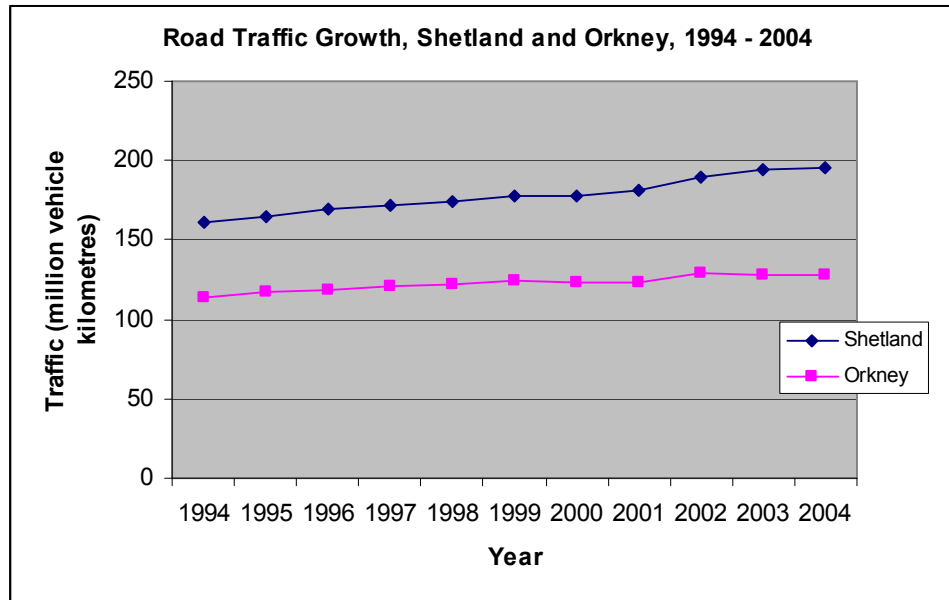
Road Traffic Trends

Table 3.17 presents historic traffic trends on Shetland's roads. The results show that between 1994 and 2004, traffic levels increased from 161 million vehicle kilometres per year to 195 million vehicle kilometres - an increase of 17% in ten years, which is amongst the highest percentage growth rates in Scotland. In comparison, traffic levels on Orkney's roads increased by 11% between 1994 and 2004. Despite the high percentage growth, the absolute increases in traffic levels are amongst the lowest in Scotland.

Table 3.17: Traffic on all roads, by Council area (million vehicle kilometres)

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Shetland	161	165	169	172	174	178	178	181	190	194	195
Orkney	114	117	119	121	122	124	123	123	129	128	128
Total LA Roads	23,488	23,844	24,301	24,621	24,917	25,307	25,228	25,354	26,200	26,439	26,715

Source: Scottish Transport Statistics, No.24, Scottish Executive, 2005.

Figure 3.2: Road Traffic Growth, Shetland and Orkney, 1994 - 2004

Traffic monitoring on specific roads is undertaken by SIC on a regular, although not systematic basis, typically in relation to scheme assessments. Two monitoring loops are provided to the north and to the south of Lerwick. Long term monitoring suggests an annual growth rate of 2.1%.

Despite these traffic level increases, congestion is not viewed as a problem in Shetland as corresponding traffic levels do not create significant adverse impacts.

3.12.4

Car Ownership Trends

The number of households with no cars available stands at 25% in Shetland, whereas in Scotland as a whole, 34% of households do not have access to a car. Moreover, whilst the number of households that have access to one car in Shetland (43%) is below the Scottish (44%) and Orkney (50%) rates, the number of two and three car households in Shetland is above the Scottish and Orkney averages. This is shown in Table 3.18 below.

Table 3.18: Households with cars available for private use, 2003/2004.

	Number of Cars available for Private Use (%)			
	0 cars	1 car	2 cars	3+ cars
Shetland Islands	25	43	27	5
Orkney Islands	23	50	23	4
Scotland	34	44	19	3

Source: Transport across Scotland in 2003 and 2004: Some Scottish Household Survey results for parts of Scotland (2006)

3.12.5

Costs of Motoring

The consultation process raised concerns over fuel prices, as it was stated that there is a greater dependency on fuel in remote locations like Shetland. The Rural Scotland Price Survey¹⁷ from 2003 provides a comparison of fuel costs for urban locations in Scotland against rural locations. Three Shetland sites - in Lerwick, Brae and Unst - were considered in this analysis.

It was found that fuel prices (for unleaded petrol, lead replacement and diesel) were on average 6.3% higher in rural areas of Scotland.

However, further analysis suggested that fuel costs in remote rural areas (such as in Shetland) were 6.6% higher than the rest of Scotland.

Despite the clear increase in fuel prices in rural areas, the study noted that on the whole the overall price of motoring in rural areas like Shetland was approximately 4.4% lower than in urban areas of Scotland. This is due to a number of reasons including the reduced costs of car insurance in rural areas.

Table 3.19: Percentage difference between urban and rural areas.

	All Rural – Urban 2003	Remote Rural – Urban 2003
Food and Catering	+8.2%	+6.6%
Housing	-13.8%	-10/6%
Personal Goods and Services	+1.3%	+2.3%
Motoring (including road fuel)	-5.7%	-4.4%
Road Fuel only	+6.3%	+6.6%

Source: 2003 Rural Scotland Price Survey

3.12.6

Road Safety

Table 3.20 provides a comparison of the number of casualties (all severities i.e. killed and seriously injured) in Shetland. The results from the Orkney Islands have also been presented as Orkney acts as a good comparative location due to its similar geography and population characteristics.

Table 3.20: Casualties by police force area and severity, 1994-98 and 2000-2004 averages

Council	1994-98 average			2000-2004 average		
	Killed	Killed & Serious	All Severities	Killed	Killed & Serious	All Severities
Orkney Islands	2	17	52	0	9	46
Shetland Islands	3	24	82	2	11	47

Source: Road Accidents Scotland 2004

The results show that, each year on average, between 2000 and 2004, there were 47 casualties on Shetland's roads. Between 1994 and 1998, there was an average of 82 casualties on Shetland's roads. Therefore, there has been a significant improvement in road safety on Shetland, as shown by the 43% drop in casualty rate between the 1994 and 1998 averages and the 2000 to 2004 averages.

In the Orkney Islands, there has also been a decline in casualties from an average of 52 casualties between 1994 and 1998 to an average of 46 casualties between 2000 and 2004. Overall, Orkney has experienced a drop of 11% in road casualties compared to the 1994 to 1998 averages.

The consultation process also revealed the belief that drink driving continues to be a major problem in Shetland and this appears to be reflected by the statistics shown in Table 3.21

¹⁷ Sneddon Economics (2003), *Rural Scotland Price Survey 2003*. Highlands and Islands Enterprise, Inverness. Available from <http://www.hie.co.uk/HIE-economic-reports-2005/rural-scotland-price-survey-2003---final-report.pdf>

below. Although the statistics relate to the Northern Constabulary area, which includes Orkney and the Highlands as well as Shetland, it is shown that drink driving is a big problem in the most remote rural areas. For example, there were 35 reported cases of drink driving in the Northern Constabulary region in 2003 per 10,000 people. This is the highest of all police force areas in Scotland.

The consultation process, revealed numerous concerns related to speeding vehicles. Clearly, policing long lengths of remote roads causes specific problems in terms of detecting such traffic offences.

Table 3.21: Crimes and offences recorded by police force area per 10,000 population, 2003

Crime / Offence group	Central	Dumfries & Galloway	Fife	Grampian	Lothian & Borders	Northern	Strathclyde	Tayside	SCOTLAND
Drunk driving	22	16	23	25	19	35	22	29	23
Speeding	488	733	253	499	360	240	289	498	358
Unlawful use of vehicle	192	166	228	142	129	121	204	267	185
Vehicle defect offences	144	41	56	48	68	93	96	61	81
Other	130	109	116	77	171	92	148	167	139

Source: Recorded Crime in Scotland 2003

3.13

Public Transport

3.13.1

Introduction

Shetland Islands Council provides, through contracts with local operators, all bus services in Shetland. There are no commercially operated services. Services generally provide for commuters, shoppers, the elderly and those with a disability to travel to and from Lerwick.

Community transport services are also provided as required in each area. A significant, and successful, development in recent years has been the introduction of an integrated bus/ferry service providing the opportunity for residents in the North Isles to travel to Lerwick and return on the same vehicle. Overall, and compared to other rural areas of Scotland, Shetland benefits from a high level of service with every community benefiting from:

- Transport to and from Lerwick for the working population
- Weekday shopper services
- Public transport connections to each Mainland ferry terminal, Sumburgh Airport, and Tingwall Airport.

One of the key constraints facing the public transport sector in Shetland is that it is difficult to provide financially sustainable services in an environment where overall service user numbers are low. Many socially excluded groups who could benefit most from public transport are often also those who live in the remoter parts of Shetland, in areas where low population numbers make it financially unfeasible to provide frequent services to without significant subsidy.

3.13.2

Public Transport Trends

Patronage levels for the main public transport services in Shetland are provided in Table 3.22. This shows that bus passenger numbers appear to be increasing, with the total patronage numbers increasing from 259,147 in 2000/01 to 284,617 in 2004/05.

Table 3.22: Patronage numbers of Shetland's bus services 2000 – 2005.

Route		Passengers				
		2000/01	2001/02	2002/03	2003/04	2004/05
Lerwick to:	South Mainland	92,758	91,941	93,797	92,440	99,087
	North Mainland	80,217	81,609	78,997	75,709	77,742
	West Mainland	44,018	45,533	41,982	40,378	46,782
	Scalloway / Burra	42,154	48,983	54,302	62,784	61,006
Total		259,147	268,066	269,078	271,311	284,617

Source: SIC Public Transport Unit / Shetland in Statistics

It is also to be noted that the number of trips made by concessionary travellers increased from 35,770 in 2000/01 to 59,715 in 2004/05. It is believed that the introduction of free concessionary travel and the eligibility of men aged 60-64 contributed to this increased usage.

3.13.3

Public Transport Integration

One prominent comment highlighted during consultation was the concern that public transport services did not always integrate with flights arriving and departing from Sumburgh Airport.

The tables below have been created by comparing the public transport times of services arriving and departing from Sumburgh Airport with the times of flights arriving and departing into the airport. It is noted that these reflect relatively recent changes in flight arrivals and departures.

Table 3.23 - Bus Connections for Passengers Departing Sumburgh

Dep Lerwick	Arr Sumburgh	Flight Departure	Destination
06.00	06.45	07.30	Edinburgh
06.00	06.45	07.35	Inverness/Orkney
06.00	06.45	08.00	Aberdeen
09.00	09.45	11.15	Aberdeen
09.00	09.45 ¹	11.40	Glasgow
12.00	12.55	14.00	Aberdeen
14.00	14.50	15.30	Edinburgh
14.00	14.50	15.35	Inverness/Orkney
14.00	14.50	17.00	Aberdeen
17.10	18.10 ²	20.00	Aberdeen

1. 10.30 ex Lerwick arrives 11.20, to late for minimum check in

2. Stops at terminal building on request.

It can be seen that many of the departures during the day are well catered for by the bus service. Of the daytime departures, the most problematic are the 11.15 to Aberdeen, and the 11.40 to Glasgow. In the evening, however, public transport integration is more problematic.

For flight arrivals, Table 3.24 considers connecting bus times. The bus connection for the 07.30 arrival from Aberdeen is associated with a risk that it may leave too early for passengers with luggage. The morning arrivals from Edinburgh and Inverness are poorly integrated, as is the 15.00 from Glasgow. Interestingly, the timetable provides a bus service for those departing the airport on the later arrivals.

Table 3.24 – Bus Connections for Passengers Arriving at Sumburgh

Origin	Flight Arrival	Dep Sumburgh	Arr Lerwick
Aberdeen	07.30	07.40 ¹	08.40
Aberdeen	10.30	10.55	11.43
Edinburgh	11.10	12.35	13.20
Inverness/Orkney	11.20	12.35	13.20
Aberdeen	13.30	13.45	14.40
Glasgow	15.00	16.50	17.40
Aberdeen	16.30	16.50	17.40
Edinburgh	19.10	19.45	20.35
Inverness/Orkney	19.20	19.45	20.35
Aberdeen	19.30	19.45	20.35

1. The 10 minute difference may not be sufficient in all cases if luggage is being collected.

The opportunity for integration between public transport and the NorthLink ferries has also been considered. According to public transport timetables, the Lerwick town service (north) stops at the Holmsgarth ferry terminal. This service subsequently connects with the rural services departing from either the Viking Bus Station, or the Esplanade.

All other Shetland Mainland inter-island ferry terminals and the inter-island air service terminal at Tingwall benefit from either scheduled services, or demand responsive services.

3.13.4

Taxis

There are a relatively high number of taxis and private hire vehicles (PHVs) in Shetland, especially when compared against the levels of taxis and PHVs available in Orkney. The consultation revealed some dissatisfaction with the high costs of taxis which were frequently used for late night travel in the absence of public transport. However, Shetland also has a network of dial-a-ride taxis, which were particularly well-received, such as the dial-a-ride taxi from Tingwall Airport, which is subsidised by SIC. The consultation revealed the desire to see an extension of dial-a-ride taxi services throughout Shetland, particularly in the more remote rural areas.

Table 3.25: Taxi and Private Hire Cars Licensed in Shetland and Orkney, 2003

Council	Taxi Vehicles Currently Licensed	Private Hire Cars Currently Licensed	Total Vehicles Licensed	Taxi Driver Licenses	Private Hire Driver Licenses	Total Drivers Licensed
Shetland Isles	75 *(76)	55 *(56)	130 *(132)	342 *(320)	75 *(68)	417 *(388)
Orkney Isles	31	12	43	110	4	114
Scotland	10,040	10,056	20,096	25,034	11,252	38,150

Source: Scottish Transport Statistics, No.23, Scottish Executive, 2004.

* Figures in brackets show current (2006) figures.

3.14

Walking and Cycling

3.14.1

Walking

Encouraging walking as a form of transport in Shetland will never be easy, due to the changeable weather, open landscape, and dispersed settlement pattern. Walking as a leisure activity has for many years been increasing and it is important that sufficient facilities are developed to assist in this pursuit. However, consultation within Lerwick revealed that many people were happy to walk in and around Lerwick, with few problems or constraints to this form of transport.

3.14.2

Walking Trends

According to the Scottish Household Survey Results, levels of walking for pleasure or for keep fit purposes in Shetland are higher than the Scottish average, as 48% of Shetland's population walk for at least a quarter of mile at least one day a week, compared to 44% in Scotland as a whole.

By contrast, 54% of Shetlanders do not walk on any day of the week *as a means of transport*. This is slightly better than in the Orkney Islands (56%) although is lower than the Scottish average, which suggests 45% of the population do not walk on any day of the week as a means of transport. This is a reflection of the rurality of the islands and the longer distances involved in travel to workplaces etc.

Table 3.26: Adults - frequency of walking in the previous seven days*: 2003 / 2004

	As a means of transport to go somewhere eg work/shopping (%)					Just for pleasure or to keep fit - incl. Jogging and walking a dog (%)					Sample size (=100%)
	Did not walk	1-2	3-5	6-7	1+ days	Did not walk	1-2	3-5	6-7	1+ days	
Shetland	54	16	16	14	46	46	23	15	15	48	637
Orkney	56	17	22	6	44	47	24	20	9	53	637
All Scotland	45	17	21	15	54	56	17	13	14	44	28,633

*The number of days, in the previous seven days, on which the person made a trip of more than a quarter of a mile by foot for the specified purpose.

Source: Transport across Scotland in 2003 and 2004: some Scottish Household Survey results for parts of Scotland (2006)

3.14.3

Cycling

Shetland is not necessarily an ideal cycling environment, at least for part of the year, owing to the weather, dispersed settlements, and prevailing terrain. However, within the settlements, some people do use bicycles for daily transport and among children the proportion is higher. The Council is a partner in the development of the North Sea Cycle Route that passes through Shetland and forms part of Route 1 of the National Cycle Network, promoted by Sustrans. Cycling is particularly popular for visiting tourists during the summer months.

3.14.4

Cycle Trends

Table 3.27 presents cycle trends in Shetland. The results show that levels of cycling on one or more days per week is very low in Scotland (3%) and even lower in Shetland as a whole (1%). There is a slight increase in levels of recreational cycling in Shetland (2%) although again this is below the Scotland average.

Table 3.27: Adults - frequency of cycling in the previous seven days*: 2003 / 2004

	As a means of transport to go somewhere eg. work/shopping (%)					Just for pleasure or to keep fit (%)					Sample size (=100%)
	Did not cycle	1-2	3-5	6-7	1+ days	Did not cycle	1-2	3-5	6-7	1+ days	
Shetland	99	0	0	0	1	98	1	0	0	2	639
Orkney	96	3	1	0	4	96	3	1	0	4	635
All Scotland	97	1	1	1	3	96	3	1	0	4	28,694

* The number of days, in the previous seven days, on which the person made a trip of more than a quarter of a mile by bicycle for the specified purpose

Source: Transport across Scotland in 2003 and 2004: some Scottish Household Survey results for parts of Scotland (2006)

3.15

Summary

This chapter has outlined the range of transport services and infrastructure available across Shetland. Historical trends related to infrastructure and services have also been offered along with some of the issues and trends that will require consideration when planning for the future development of these services.

- Future rises in fuel prices may begin to reduce growth in car use in the future.
- The reliance on lifeline links in Shetland constrains choice, imposes timetable constraints, introduces vulnerability to transport connections and accessibility, and can deter investment. This affects both external and inter-island links.
- As far as external links are concerned, it is to be recognised that there is a constraint on the ability of the RTP to directly influence the provision of external links. A key challenge will be to work with operators to improve services and lobby for improvements.
- The introduction of lower air fares for islanders is likely to generate additional demand at Sumburgh in the future.
- External links experience a high degree of seasonality in demand. This has the impact of capacity constraints, for example, during the summer holidays.
- There is a limited market size – both for passengers, and for freight. This affects many of Shetland's internal, inter-island and external transport services. Accordingly, a key challenge is to provide high levels of accessibility whilst providing financially sustainable services.
- High costs of providing and maintaining the existing transport system is a major constraint affecting transport provision in Shetland.
- Future rises in fuel prices may begin to reduce growth in car use in the future.
- There is also limited incentive for modal shift away from the private car since there is little congestion and a high reliance on cars due to the rural characteristics of Shetland.

4 Policy Context

4.1 Introduction

A review of the existing policy context forms a further element of background context setting. Prior to developing a vision and objectives for the transport strategy, it is important to understand the broader vision and objectives that Shetland is working towards, and the framework within which the transport strategy will be set.

4.2 Existing Shetland Local Transport Strategy 2000-2003

Unlike Regional Transport Strategies, Local Transport Strategies are non-statutory documents. The existing Local Transport Strategy was developed by Shetland Islands Council in 2000 and will be superseded by the RTS. The following sections outline the vision, aims and objectives of the 2000 LTS, all of which have been given cognisance in the development of the RTP vision and objectives.

4.2.1 Vision

The overall aim of the Shetland LTS is “to deliver an integrated transportation system that meets the needs of Shetland people in a sustainable way whilst ensuring continuing economic prosperity to the islands”.

4.2.2 Aims

The key aims of the LTS are:

- To support the local economy;
- To reduce social exclusion;
- To reduce the environmental impacts of travel;
- To improve safety for all road and transport users; and
- To promote better health and fitness.

4.2.3 Objectives

The following objectives were used for the purposes of the Shetland LTS.

- Sustain the economy of Shetland through maintaining an appropriate level of accessibility by road, sea and air, both for internal and external transport.
- Reduce the need for travel through decentralisation of development opportunities, thereby reducing commuting;
- Improve and enhance access to Lerwick town centre and all other existing settlements by all forms of transport and provide for appropriate levels of car parking;
- Improve facilities for disabled access;
- Develop public transport corridors and promote innovative and flexible public transport usage;
- Promote awareness of travel options in order to limit traffic growth;
- Improve environmental conditions by promoting traffic calming measures that increase the safety of all road users;
- To maintain the asset and make improvements to the road network in order to support gains in safety, environmental, accessibility, integration or economic terms; and
- Maximise facilities for walking and cycling as alternative means of transport.

4.2.4 LTS Actions

The key actions arising from the previous LTS have been extracted from the document, and are presented in table 4.1. These were reviewed by officers of Shetland Island Council. It was confirmed that good progress had been made on some elements of the strategy, although some action required continued attention. There was specific concern regarding the ongoing progression of the ferry and terminal replacement programme.

Table 4.1 - Key Actions Arising from 2000-2003 Local Transport Strategy

External Transport	Inter-Island Transport	Internal Transport
<ul style="list-style-type: none"> • Press for external air and sea services that meet Shetland's business and social needs. • Press for the effective maintenance, development and marketing of external and international air and ferry services, including flexible ticketing initiatives. • Encourage the provision of satisfactory connecting freight and passenger services from Aberdeen to the rest of the UK and abroad. • Ensure, through survey, investigation, dialogue and consultation that the Council has an accurate picture of Shetland's external transport needs. • Promote Sumburgh as Shetland's principal airport and support proposals for the maintenance and development of its facilities. • Recognise the valuable role played by Scatsta Airport in support of the oil industry, and its ability to provide a limited diversionary port for Sumburgh. • Press for adequate facilities on external transport services for all who have special needs, including those with a disability. 	<p><u>Air Services</u></p> <ul style="list-style-type: none"> • Retain current levels of air service to the outer isles. • Continue to provide internal air services that provide good and affordable access between Shetland Mainland and outer islands, with satisfactory connections to external air services. • Continue to offer lower air fares for island residents on inter-island flights. • Continue to provide grant funding for Airstrip Trusts to maintain island air strips. • Consider options for the future use of Unst Airport. <p><u>Ferry Services</u></p> <ul style="list-style-type: none"> • Retain current levels of ferry service to the outer isles. • Pay regard to the Ferry Terminal and Replacement Programme. • For the inter-islands ferry service, introduce Performance Management and Planning (PMP) under the Best Value initiative. • Update the electronic ticketing system operated on the ferry services to ensure integration with other public transport services. • Seek to maintain a high level of ferry service to the islands. • Development of Bressay Bridge 	<p><u>Walking and Cycling</u></p> <ul style="list-style-type: none"> • Encourage walking through improvements in infrastructure provision, route development, and information. • Maximise facilities for walking and cycles as an alternative means of transport through the provision of rural footways to the creation of cycle paths and facilities. • Undertake social crossing assessments. • Enhance the attractiveness of cycling wherever possible and audit road schemes to eliminate negative impacts on cyclists. Use traffic management and calming techniques to create cycle friendly environments. • Examine and develop links between cycling and public transport. <p><u>Public Transport</u></p> <ul style="list-style-type: none"> • Develop public transport corridors. • Promote innovative and flexible public transport usage. • Continue to provide an extensive level of bus service provision meeting as far as can be afforded, the needs and aspirations of each rural area. • Provide services for commuters, shoppers, elderly, and those with a disability to travel to and from Lerwick. • Provide new bus shelters in line with expected regular passenger usage. • Provide "community transport" services as required in each area. • Continue to operate concessionary fare scheme (Fares are set to become the responsibility of the newly formed Scottish Transport Agency from April 06). • Continue to contribute to the development of the annual 'Guide to Concessions'. • Develop through ticketing initiatives (i.e. between bus and ferry trips, smartcard compatible, and enabling concessionary and school passenger usage on local bus services). • Continue to produce and distribute public transport timetables each year and maintain transport information via the Council website. • Provide timetables at those bus stops identified as having relatively high local/tourist usage. • Continue to work closely with the Community Transport Association and provide advice and assistance to local voluntary groups with regards to transport projects. • Instigate public transport assessments through the Community Councils, including the use of 'Community Travel' questionnaires • Improve access to Lerwick and key settlements through public transport improvements and provision of car parking. • Encourage the development of informal park and ride sites near rural road junctions. <p><u>Travel Awareness</u></p> <ul style="list-style-type: none"> • As the major employer in Shetland, examine and implement a travel plan. • Target other major employers (Health Board and Sullom Voe) for travel awareness. • Investigate the possibility of a Shetland wide car sharing club. • Promote green travel plans. • Reduce the need to travel through decentralisation of development. • Encourage and assist with the development of the Safer Routes to Schools initiative. • Promote the use of greener fuels, such as LPG and assist in the introduction of LPG related supplies and services. <p><u>Roads</u></p> <ul style="list-style-type: none"> • Review the policy that the Council will not pursue claims of damage to roads caused by extraordinary traffic where this arises as a result of increased agricultural or fish farming activity. • Actively encourage the use of appropriately sized vehicles in remote and sensitive locations. • Continue to develop, where appropriate, the use of community piers as a realistic alternative to road transport. • In the Council's programme of road improvement and rebuilding, prioritise the maintenance of the spine road network and the provision of ferries. • Continue to monitor road traffic volumes by way of continuous loop sites on the approaches to Lerwick and throughout Shetland. • Proposed part-time pedestrianisation of Commercial Street, to allow for deliveries and collections at certain times of the day only. • Continue to provide new footways, lighting and other minor improvements in Shetland's network of small villages. • Continue to licence taxi and private hire vehicles to meet local needs. • Investigate the provision of taxi stances within the town centre or near the lay-by on the Esplanade and/or near Fort Charlotte

4.3 HITRANS Regional Transport Strategy

Before Shetland successfully secured Regional Transport Partnership status, Shetland was a member of HITRANS, the regional transport agency for the Highlands and Islands. The following sections outline the policy vision and objectives adopted by HITRANS in their Regional Transport Strategy, which was produced in 2002. Similar to the Shetland Regional Transport Partnership, HITRANS (the Highland Regional Transport Partnership) are now in the process of developing their own regional transport strategy.

4.3.1

Vision

According to the HITRANS RTS, HITRANS has a vision for a regional transport system which:

- Provides cost effective access to all regional transport services in pursuit of social inclusion.
- Enables the optimum growth of the regional economy through a network which secures the efficient import and export of products: facilitates internal and external business travel; and encourages growth in tourism.
- Is safe to use and operate.
- Is sustainable and has the minimum practical impact on the environment.

4.3.2

Objectives

The following statements present the objectives that were stated in the HITRANS RTS.

- HITRANS want to see a reduction in costs to the users of the transport network and reduced costs in the movement of goods. Cost of transport is one of the most pressing concerns of communities and businesses in the region because of the long distances to be travelled.
- HITRANS want to improve journey times by investment in better infrastructure particularly roads, public transport vehicles and vessels, and the rail network. Over the strategy period, modernising the road network will be a key priority.
- HITRANS want to improve integration in the public transport system to increase choice, reduce delays and waiting periods, and make public transport more attractive. HITRANS also want to increase the choice of destinations provided by public transport particularly for movements to centres outside the Region. HITRANS want to improve the frequency and flexibility of public transport particularly in rural areas and in the external links to centres outside the region. Developing the region's air service network will be a key priority.

4.3.3

RTS Actions

In the context of Shetland, the key actions were the progression of the extension of Sumburgh Airport runway, support for the Bressay Bridge, and wider policy support for the introduction of Public Service Obligations for lifeline air services. SIC has also benefited from HITRANS funding support for information systems at ferry terminals, and other transport infrastructure.

4.4

Scottish Executive Transport Policy

It is important that the Transport Strategy can demonstrate compliance with the established Scottish Executive policy context, and also identify opportunities how STP can contribute to achieving the Executive's their aims, in order to maximise opportunities for funding.

4.4.1

Vision

The Scottish Executive's vision is:

An accessible Scotland with safe, integrated and reliable transport that supports economic growth, provides opportunities for all, and is easy to use; a transport system that meets everyone's needs, respects our environment, and contributes to health; services recognised internationally for quality, technology and innovation, and for effective and well-maintained networks; a culture where fewer short journeys are made by car, where we favour public transport, walking and cycling because they are safe and sustainable, where transport providers and planners respond to the changing needs of businesses, communities and users, and where one ticket will get you anywhere.

4.4.2

Overall Aim

The Scottish Executive's overall aim is:

To promote economic growth, social inclusion, health and protection of the environment through a safe, integrated, effective and efficient transport system.

4.4.3

Objectives

- Promote economic growth by building, enhancing, managing and maintaining transport services, infrastructure and networks to maximise their efficiency
- Promote social inclusion by connecting remote and disadvantaged communities and increasing the accessibility of the transport network
- Protect our environment and improve health by building and investing in public transport and other types of efficient and sustainable transport which minimise emissions and consumption of resources and energy
- Improve safety of journeys by reducing accidents and enhancing the personal safety of pedestrians, drivers, passengers and staff
- Improve integration by making journey planning and ticking easier and working to ensure smooth connection between different forms of transport.

4.4.4

Principles

The 2004 Transport White Paper “Scotland’s Transport Future” places an emphasis on “putting in place the right governance arrangements to improve strategic planning and the focus on delivery, and secure Best Value in transport expenditure.”

It also states, “There is a duty, as well as a challenge, to ensure that resources made available by the tax-payer are **spent in line with strategic objectives**, sit **within legislative provision and competence**, are used within audit requirements, and **deliver value for money**. Tools which are being used to meet the challenge include **sound procurement procedures**, **performance audit processes**, the development of **asset management plans**, and **Scottish Transport Appraisal Guidance (STAG)**”.

All projects which require Scottish Executive support or approval require to be appraised in accordance with the STAG. The STAG appraisal framework considers not only financial aspects, but also fit with scheme objectives, implementability, as well performance against environment, safety, economic, accessibility and integration criteria.

The over-riding principles of STAG (which is in accordance with HM Treasury Green Book Guidance on Appraisal¹⁸) are that the decision making process is:

- **Objective-led:** All activities and decisions should arise from established aims of the planning organisation with respect to transport and associated policy areas;
- **Open – minded:** The guidance suggests working up possible projects or policies on the basis of defined objectives supported by a thorough understanding of the problems and opportunities of the area, rather than seeking to fit an existing proposal retrospectively to planning objectives;
- **Pragmatic:** Work done should reflect the relative need for accuracy, the scale and expected impacts of proposals and their costs;
- **Auditable:** It must be possible to see how planners have got from objectives to their final conclusion; and
- **Inclusive:** Effective involvement of stakeholders is not presented as a chore but as a crucial required input to arriving at a final proposal which meets expectations and which can be delivered.

4.5

Shetland Community Planning Framework

The Shetland Community Planning Board provides a useful and relevant framework within which to place the RTP, as it contains the major stakeholders – Shetland Enterprise, NHS Shetland, Association of Shetland Community Councils, Northern Constabulary, and Shetland Islands Council. Indeed, LTS and RTS guidance stresses the relationship with community plans.

4.5.1

Vision

The community planning framework’s vision is:

To be a sustainable and self sufficient community where everyone works together towards the same goals. Together we wish to ensure the long term vitality and well-being of Shetland, a place where:

¹⁸ HM Treasury (2003), *Green Book, Appraisal and Evaluation in Central Government*. TSO, London.

- Our economy is prosperous, competitive and diverse;
- Our society is vibrant, healthy and safe, and one in which everyone is able to take part;
- Our outstanding environment is conserved and enhanced; and
- Our unique cultural identity and spirit is celebrated and promoted;
- A key approach is to maintain and strengthen the population of Shetland, particularly in rural areas.

4.5.2

Elements

The community planning framework contains four main elements:

- **Economic:** To maintain and improve the prosperity of Shetland, by making sure businesses, communities and individuals reach their full potential; particularly at this time when we cannot be sure of Shetland's future economy
- **Social:** To make sure all individuals, groups and communities have equal access and opportunity to a health, safe, active and vibrant society
- **Environment:** To ensure Shetland's environment remains of high quality, with its distinctive landscapes, habitats and species conserved and enhanced, and the community's environmental footprint reduced.
- **Cultural:** To make sure Shetland keeps its distinctive character and works for excellence in everything it does.

4.5.3

Principles

It is also believed that the transport strategy, and the transport partnership could benefit from recognition of **the principles** from the Shetland Community Planning Framework. This states:

As agencies in Shetland we provide a variety of public services. We will work together to make these services better, and more suited to the needs of the people of Shetland. Therefore, at all times, we will:

- **Work Together**
 - To ensure we are accountable in the tasks we set ourselves;
 - In an open way;
 - Within a joined-up framework for drawing together all our different initiatives;
 - To remove any overlap in our services; and
 - To achieve more than the sum of our parts.
- **Talk and Listen to Communities**
 - By making sure local communities and groups all have an equal voice;
 - Making sure Children and Young People are included, the future of Shetland is dependent upon them;
 - In order to learn more about the needs and desires of Shetland, so that we can adapt our services to meet these;
 - In a way that which will make clear how we intend to engage with communities; and
 - Encourage people to take part in this debate.
- **Work to make sure that Services give value for money, and are appropriate to Shetland circumstances**
 - Not compromising the future for the sake of the present;
 - Making sure that services are designed for and centred on the people who are using them;
 - Continuing to improve;
 - Learning from past experience; and
 - Being clear about how we will achieve our work from the start, and open about our plans.

4.6

Other "Context Setting" Strategies

The RTP/RTS sits within the wider Shetland context, interlinking with other key partnerships/strategies, including:

- Shetland Development Plan;
- Economic development strategy
- Social, Housing, Education plans; and
- Healthcare strategy.

The objectives and key principles of these plans and strategies, with which it will be important for the RTS to link, are outlined in more detail in Chapter 9.

5 Consultation Outcomes

5.1 Introduction

This chapter summarises the key findings from the consultation process undertaken to inform the development of Shetland's Regional Transport Strategy (RTS).

The consultation exercise provided a valuable snapshot in time of the transport problems, issues and opportunities as perceived by residents and stakeholders of the Shetland Islands. This infers that the issues raised in this report are those that are very current in the minds of the consultees. As a result, even since the production of this report, developments and policies have come into place that respond to some of the comments raised during consultation, and thus some of the issues contained in this report are no longer as prominent.

The nature of comments presented in this chapter are those that focus on transport problems. However, it should be stressed that many of the comments received during consultation were prefaced by a strong acceptance that there are many good transport services in Shetland.

The consultation exercise provided a record of the views as expressed by the consultees themselves, providing a valuable understanding of consultees perceptions and their comprehension of issues. We have typically not sought to clarify, or correct specific views or opinions.

5.2 Methodology

The consultation process began in October 2005 and continued until February 2006. Consultation meetings were held with all 18 Community Councils in Shetland, the majority of which were open to the public. In addition separate community meetings were held on Fair Isle and Foula to enable the residents of these islands, remote from the main part of their Community Council areas to express their opinions. On Papa Stour, questionnaires were issued to residents in addition to individual meetings held on the island.

Meetings were also held with other key stakeholder groups. These groups included SIC officers, transport providers and hauliers, businesses (including stakeholders from the seafood, livestock, retail, oil, construction and tourism industries), the public sector (e.g. Police, Ambulance, and Fire Services), the health sector, the voluntary sector, schools, young people and the elderly.

In addition to the face-to-face meetings, of which there were just under 100 in total, some further consultation techniques have been applied including reviews of previous research such as the Your Voice questionnaire results, the 2000 NOP Transport Needs Survey, a recent Health Service questionnaire, and outcomes from Initiative at the Edge Workshops.

Questionnaires were issued to users of the Council's library van service, whilst a questionnaire was also posted onto the Council's web page for online completion. A transport related thread was also posted on the "Have Your Say" on-line discussion forum. Letters were also sent to Parliamentary Members inviting their views on the RTS.

A review of the consultation process has revealed the following key findings.

5.3 External Links

On the issue of external links, discussion largely centred on the NorthLink ferry service and the external air service operated from Sumburgh Airport. It is worth mentioning that there was a high level of repetition during consultation on external links, which offers confidence in the results collected.

The nature of comments received on Shetland's external links tended to fit into the themes identified below.

5.3.1 *Cost*

A continual theme across the whole of the consultation exercise was the recurring issue of the high cost of transport to the Scottish Mainland, be it for freight, or for passengers. This was most frequently mentioned in relation to passenger air trips. The recent announcement of subsidised islander air fares was made after completion of the consultation exercise. The wide range of air fares, and the perceived unpredictability in fare levels was also frequently mentioned.

The total costs of taking a car, family and cabin on the NorthLink service was also frequently raised, whilst it was recognised that single passenger fares, without a berth, were quite affordable. High costs for freight were also highlighted, although it was recognised that the new ferry tender would feature a freight subsidy.

5.3.2 *Capacity*

Another universal comment was the difficulty of making a cabin booking on the NorthLink service during busy periods. Whilst recognising higher standards of service, and an improved timetable, the lack of cabin space was an issue causing specific comment that could constrain tourism opportunities.

5.3.3 *Accessibility of Ports and Airports*

The lack of adequate long stay parking arrangements for the NorthLink service in Lerwick was frequently mentioned, as was the lack of short stay parking arrangements for the terminal in Aberdeen. At Sumburgh, the lack of available car parking was frequently highlighted. However, at Sumburgh, the perception that there is a lack of co-ordination between bus times and aircraft arrivals and departures was specifically and frequently highlighted.

5.3.4 *Future Scottish Mainland port*

Throughout the consultation period, there was consistent debate surrounding the desirability of continuing to have the Mainland Port in Aberdeen for all, or some of the passenger or freight connections. Alternative ports highlighted included Peterhead, Tayside, or Rosyth. There were many strongly held views on the situation, although there was no clear consensus. This perhaps reflects the broad range of users, both freight and passengers, using the service.

The end of the consultation period coincided with the publication of a report discussing the possibility of introducing larger combined passenger and freight services onto the route.

Reasons for a preference for an alternative port came from the desire to see more direct freight links to the central belt, the ability to attract more tourists to Shetland, a possible link to the European ferry at Rosyth, and the perceived restrictions on larger vessels at Aberdeen.

Reasons against alternative ports were based around the suitability of Aberdeen with onward access to rail, air and coach connections, good links to the city centre, established health and social links, the fact that from Aberdeen passenger numbers had soared, and the fact that alternative harbour berths in Aberdeen could accommodate larger ferries.

Some consultees highlighted the need for further quantified information on passenger and freight trip origin and destinations, delays and disruptions, as well as an appraisal of possible future service options including vessel/fleet sizes and configurations prior to being able to provide a view on this issue.

5.4 **Inter-Island Links**

Discussions in reference to inter-island links revolved around the life-line role that the inter-islands air and ferry services play in sustaining Shetland's outer isles. The sections below summate the main findings related to the inter-island transport services.

5.4.1 *Sustainability of remote islands*

A recurring issue for outer islands was the role that transport services played in ensuring the continued vitality and viability of each island. This issue was perhaps most acute on the most remote islands (such as Foula, Fair Isle, Papa Stour, Skerries, Unst and Fetlar), but was also a feature of discussions on Yell, Whalsay and Bressay.

It was recognised that a secure and long-term commitment was required from the Council for supporting transport links by ferry and (where appropriate) air, whilst acknowledging that other

factors (such as education, access to health, employment opportunities, housing, and community strength) were also vitally important.

5.4.2 *Ferry Links*

A recurrent issue was the desire for the ferry service to be as responsive and as reliable as possible, noting the constraints imposed by the weather. This was translated into a desire, where at all practical, for the ferry crews and ferry to be based on each island being served, supported, where appropriate, with the necessary infrastructure. It was felt that this would bring the benefits of jobs, and also the ability to respond more readily to changing weather conditions, and a willingness by the ferry crew to be more flexible to community needs.

There were common desires for infrastructure improvements and investment which it was hoped would help to reduce the unreliability caused by weather patterns, particularly at Skerries and Fetlar. It was felt by the communities that this had been previously promised, but not yet delivered. Such facilities could also contribute to wider economic development objectives.

Furthermore, in relation to Whalsay, there was a strong desire to see continued progress in the development of replacement terminals, and ferries.

5.4.3 *Fixed links*

Consultation revealed an almost universal willingness to pursue a fixed link (tunnel) between Yell and Unst. The desirability of a link between Yell and Shetland Mainland was frequently mentioned, but the Yell Community Council was split on the issue.

5.4.4 *Inter-islands air service*

The value of the inter-islands air service was frequently highlighted, and there was particularly strong support and appreciation of the current pilots and operators. The possibility of additional flights for Fair Isle during the peak season, and additional flights to improve island accessibility (i.e. day trip opportunities for islanders) was a frequent desire. The taxi-bus service to Tingwall airport was particularly well received.

5.5 **Internal Transport**

Discussion on internal transport issues identified a wide variety of comments related to walking and cycling facilities, public transport accessibility as well as road safety and road maintenance issues. Many of the comments received were operational issues such as specific junctions that were considered to require improvements and particular areas where there are missing footpaths, for example. These issues are locally important, but less appropriate for the RTS, unless consistently occurring throughout Shetland. Therefore, the sections below attempt to summarise the main 'type' of issues identified through consultation on internal transport.

5.5.1 *Walking/verges*

The majority of communities consulted mentioned the constraint on walking due to the existing configuration of single track roads plus either deep ditches, or high verges. This was perceived as making walking dangerous, and unsuitable. There was a common desire for the development of rural style footpaths providing pedestrian links to key locations.

5.5.2 *Public transport issues*

Many aspects of the public transport service were appreciated. However, it was recognised that the existing public transport network primarily serves "9 to 5" workers in Lerwick, as well as day time shopper services. Night and evening services, more frequent links during the daytime, and services appropriate for trips to local shops/services were highlighted – however, it was realised that the cost and feasibility of providing this, against the numbers who would use the service and benefit would not always be balanced. There was some interest in supporting demand responsive and community transport schemes as a way of meeting the demand in a cost effective manner.

5.5.3 *Road safety*

Many consultees noted the perceived high levels of road traffic accidents in Shetland, with combinations of speed, drink and inappropriate driving behaviour most frequently mentioned. It was noted that the spine roads frequently experienced high driver speeds.

5.5.4

Road connections

Consultees noted that the level of road infrastructure was unrivalled throughout much of Scotland. However, it was noted that roads in the West Side, and North of Hillswick junction were of a poorer standard than elsewhere on the island. Consultees also highlighted the need to review the safety and layout of a number of the junctions on the Lerwick to Sumburgh route, particularly at Gulberwick, Quarff, Sandwick and Levenwick.

5.6

Other Issues

In addition to the above, some wider issues were raised during consultation including concerns over the future cost and supply of fuel, the links between transport and wider economic development, and how transport should act to centralise or, in contrast, decentralise jobs and services in Shetland.

5.7

Summary

In closing, the consultation process has proved invaluable in identifying current issues, problems and opportunities that the RTS must address. It is believed that the extensive nature of the consultation process has allowed for a strong base of information to be gathered, and places the RTS in a strong position moving forward. Another benefit of the consultation process is that it has allowed for stakeholder buy-in to the RTS, and it is essential that there is a strong perception of local responsibility for the RTS if it is to be developed and implemented effectively.

6 Problems and Opportunities

6.1

Introduction

The preceding chapters provide the majority of the background information for the development of the strategy. This information was used during a series of workshops in March 2006 which focused on the following areas:

- Confirmation of consultation findings;
- Discussion of key constraints and opportunities;
- Identification of particular problems and opportunities;
- Agreement of the strategy's vision and objectives; and
- Initiated the process of developing strategic options, and specific schemes.

The following sections present the outcomes of these workshops, held with relevant officers of SIC, and representatives of the Health Board and Shetland Enterprise, in relation to confirming key consultation findings, agreement of constraints and opportunities, and confirming problems and opportunities. Subsequent chapters consider the overarching vision, and objectives, and options.

6.2

Confirmation of Consultation Findings

A summary of the consultation results was agreed as follows.

For **external links**, key findings were:

- High cost of services – both for the provider, and the user (or those paying subsidies)
- Specific capacity issues – most notably cabin space on the NorthLink service, and some reported peak period private vehicle constraint
- Accessibility issues to port and airport – public transport access/integration and car parking
- Further consideration of contingencies required
- Keenness to see air and sea route development – to grow the travelling market, but also provide improved accessibility / supply chain efficiencies

For **inter-island links**, key findings were:

- Desire for responsive, reliable, and “island-centred” services – most acutely expressed on the smaller islands
- Desire for specific infrastructure investment at Skerries (dredging), and Fetlar (breakwater), with the projects being sought to improve reliability of ferry service, and provide wider economic and social benefits to the islands.
- Willingness to pursue Unst-Yell fixed link
- Concern over future replacement plans for vessels, and costs, leading to a broad desire for fixed links
- High level of service, and low cost to user widely recognised
- Positive impact of new Yell Sound service appreciated
- Some vehicle deck capacity issues raised, particularly Whalsay and Bluemull Sound
- Recognition of essential role played by both inter-island air and ferry services for fragile island communities
- On the smaller islands, the contribution of inter-islands air service was particularly highlighted

For **internal transport**, key findings were:

- Communities have a desire for “safe walking routes” to key facilities despite low traffic volumes – safe refuges on verges was commonly discussed
- High level of public transport provision recognised, and low fares welcomed

- Some sectors of the community looking for a public transport model which goes beyond current provision – e.g. youths, convenient links to health centres etc.
- Road safety concerns, especially speeding, dangerous driving, and drink driving
- Some support for road improvements on West Side

Finally, some **wider issues** related to transport were raised during consultation, including the:

- Future cost and supply of fuel
- Importance of links to economic, planning, community and social agendas

6.3 Analysis of Drivers, Constraints and Uncertainties

6.3.1 Key Drivers

Key drivers influencing the shape of the RTS have been identified as follows, considering the outcomes of the consultation, social and economic analysis, and review of transport networks in Shetland.

- Economic development growth could be centred on fish processing, potential oil platform decommissioning, Information Communications Technology (ICT), renewable energy, added value in food and drink, and manufacture and crafts. However, there is the potential for reduction in public sector employment, and at the Sullom Voe Oil Terminal.
- Current economic trends are tending to focus economic development in and around central Shetland, with the exception of initiatives fixed in location – quarries, aquaculture, and tourism.
- Specific future developments could include oil platform decommissioning, quarries, and fish processing facilities.
- There is a general trend of population growth around the centre of Shetland (accessible rural areas), decline within the centre of Lerwick itself, decline in remote rural areas, and decline on the most fragile islands.
- There has been growth in tourism from Scandinavia, and there are potential new markets arising from the new air route from England and Faroe. There is potential growth in some niche markets – eco-tourism, luxury breaks etc.
- Lower air fares for islanders is likely to generate additional demand at Sumburgh.
- Any further extensions to the national concessionary fare scheme may increase demand on the public transport service.
- Future rises in fuel prices may reduce growth in car use in the future, and impact on the costs of living in Shetland, and affect business competitiveness and viability. Impacts may be felt sooner and more severely in Shetland than elsewhere.
- Increased use of ICT may increase home and flexi – working opportunities.
- There are few constraints at present on increasing the physical capacity of the road network, apart from within Lerwick.

6.3.2 Key Constraints

There are a number of constraints that impact upon the development of the RTS. The most important, identified to date are as follows.

- Physical environment of Shetland – topography, severe weather, and spatial distribution of population.
- High costs of providing and maintaining the existing transport system.
- Limited market size – both for passengers, and for freight.
- Limited revenue availability, and limited external capital funding availability.
- Cultural high expectations for improvement – challenge may be in the maintenance of the existing system more than improvements.
- Reliance on lifeline links - constrains choice of mode and imposes timetable constraints. Nature of the lifeline links introduces a degree of vulnerability in terms of access, and this can deter investment on islands. This affects both external links and inter-island links.
- External links experience a high degree of seasonality in demand

- Across Shetland, there is an ageing and declining population, which may mean a higher dependence in future years on the public transport system.
- More limited opportunities to control the pattern of land use (especially housing) can reduce opportunities to improve accessibility, and can increase reliance on the private car.
- Due to the nature of provision, STP is constrained in its ability to directly influence the provision of external links.

6.3.3

Uncertainties

Some uncertainties also impact on the strategy, including:

- Future cost and supply of fossil fuels
- Future social and economic trends within and affecting Shetland – age structure, job opportunities, income, lifestyle choices and aspirations
- Changing legislative and regulatory environment
- Availability of funding for transport projects – at a European, UK, Scottish, and local level, affecting both revenue and capital expenditure.

6.4

Problems and Opportunities

A series of problems and opportunities have been identified through background research into relevant transport and socio-economic data, and further informed through the findings from consultation. They have been listed under each of the five national transport objectives – Economy, Environment, Integration, Accessibility and Safety, as well as a series of External Elements.

6.4.1

Economy

The economy objective is principally concerned with overcoming barriers to an economically efficient transport system.

- High dependence on lifeline external and inter-island lifeline links requires that these are provided in a reliable manner as practically as possible.
- High cost of freight and passenger access to and from Shetland – opportunity to explore means to reduce overall costs, yet maintain levels of accessibility. Recent announcements of subsidies for passengers (islanders only), and for freight may go some way to address this issue.
- Current capacity constraint for passenger accommodation on NorthLink ferry service.
- Some peak period vehicle deck capacity constraint on Whalsay and Bluemull Sound ferry routes.
- High cost of developing, operating, maintaining (and for inter-island ferry network replacing vessels and terminals) the internal and inter-island transport network means that value for money must be a key criteria for future development.
- There are opportunities for market and route development of external links – freight and passenger.

6.4.2

Environment

The Environment objective is principally concerned with impacts between the transport system and the environment.

- Future impacts of climate change – more severe storms, sea level increases.
- Continued requirement for protection and enhancement of Shetland's unique environmental qualities – a key future asset.
- Global, European and national pressure to tackle rising greenhouse gas emissions from transport, and the most appropriate and effective response in a Shetland context.
- Scheme design and construction, and roadside maintenance can have significant impacts on local environment and biodiversity.
- There are opportunities for education in relation to the Eco-Schools initiative.

6.4.3

Integration

The integration objective considers barriers to efficient integration of different elements of transport network, including timetabling, ticketing, and facilities.

- Potential scope for innovative schemes to improve resource utilisation between different transport sectors such as conventional public transport, Demand Responsive Transport (DRT - e.g. Dial-A-Ride services), health, education, social and community provision.
- Widespread community perception that service buses do not integrate well with flight arrivals/departures at Sumburgh.
- Forthcoming opportunities arising from integrated ticketing initiative.
- Necessity to ensure continuation of public transport and rural parcels integration opportunities (services plus facilities) at ferry terminals and Tingwall Airport.

6.4.4

Accessibility and Social Inclusion

This is principally concerned with assisting vulnerable people get to key services

- Those without a car in rural areas are particularly vulnerable to social exclusion. The number of people without cars may fall due to increasing car ownership trends, but those left behind may become smaller in number, and more vulnerable. Other influencing factors include changing expectations of the level of accessibility to be provided in rural areas, an ageing population, and also trends towards care in the community for aged persons.
- Previously highlighted timetable constraint and capacity constraint on internal and external links restricts accessibility.
- The lack of “safe” pedestrian links within settlements rarely causes severance, but can contribute to reduced pedestrian amenity in some instances. Issue again may arise from changing expectations, although will also be influenced by rising traffic volumes and speeds.
- Weather related reliability issues – perceived vulnerability arising from reliance on ferries, and air links can curtail, restrict or adversely impact upon journey making decisions.
- There is an over-riding requirement to provide adequate accessibility to key services and opportunities (jobs, health, education, shopping) for island and remote rural communities. This implies necessary contingencies to deal with planned and unplanned maintenance, contingencies if any tendered services are disrupted by operator default, and also longer term planning to deal with vessel replacement / fixed links.

6.4.5

Safety

- Challenge of improving road safety – particularly the Shetland trend of single vehicle incidents with “Killed or Seriously Injured” casualties.
- Effective enforcement of appropriate driving behaviour can be challenging in Shetland.
- There are not perceived to be any security problems for Shetland transport users.
- There are opportunities for education, and provision for facilities outside schools, through the Safer Routes to School initiative.
- Community safety can be improved by fixed links, for example, in terms of evacuation to hospital.

6.4.6

Economic Development Issues

- The right transport links and facilities can help attract tourists to Shetland – one part of the mix for this sector.
- Specific transport related investment can assist in enabling or encouraging specific economic development opportunities, and this may go beyond what is required of an “economically efficient transport system”. There needs to be early consideration of the transport issues arising from any particular development opportunities.
- Ferry jobs can be a significant factor in sustaining remote island communities.
- Improvements in transport links tend to have the impact of “centralising” economic activity, but can disperse residential location.
- There are opportunities presented by Eco-Tourism, which imply opportunities to promote and enhance Shetland’s environment, and promote local access to opportunities to enjoy the environment.
- In the longer term, there are some opportunities presented by local renewable energy initiatives to provide a diversified energy mix for Shetland.

6.4.7

Planning Issues

- Development plans are supportive of national transport objectives.
- Development control can assist in preventing, and overcoming transport related problems such as – maximising local accessibility to services for those without access to a car, footpath development, ensuring the location of future economic development opportunities corresponds with the infrastructure required to enable it. It can also provide a framework for attracting developer contributions. It is recognised that this is constrained by the historic pattern of single plot land release, although opportunities are sought when possible.

6.4.8

Health and Social Issues

- Access is an issue for those without access to a car to health facilities, and child care opportunities.
- This also relates to the specific location of health and social facilities, and the range of access opportunities to these facilities.
- There is a requirement to encourage more physical exercise, and the current transport network may work against this opportunity.

6.4.9

Service Delivery

- Decentralisation policies do not necessarily appear to have been implemented, and must be considered very carefully to ensure that they achieve the aims of improving efficiency and bringing services closer to their client. The policy has the risk of worsening accessibility overall to services and jobs if not carefully pursued. Opportunities arise from the consideration of decentralising “back room” services, and improved ICT facilities.
- Fixed links can provide opportunities to pursue service rationalisation.
- Possible future tendering of inter-island ferry links could lead to a range of different impacts, particularly in terms of service delivery, crewing strategy, and the influence of SIC over the delivery of wider economic / social objectives through the ferry service.

6.5

Summary

The preceding sections have sought to confirm key outcomes from the background research, which form the building blocks for the setting of objectives and development of strategic options.

7 Vision and Principles

7.1 Introduction

The following sections present the vision and set of principles for the RTP / RTS, as developed during the strategy workshops, and subsequently confirmed by Members of SIC and STP.

7.2 Vision

RTS guidance suggests that the vision “*should be a general and aspirational statement that is focussed more on the future than the current situation. To have value the vision must be owned by members of the partnership. To be useful – and memorable – the vision should not be too long and should not try to cover every concern, focussing instead on those concerns of most relevance to the partnership.*”

The vision was principally developed from consideration of the key constraints and problems to be tackled by the RTS, but within Shetland's wider policy context.

*The vision of the partnership is to develop an **effective, efficient, safe and reliable** transport system for Shetland. The transport system will comprise of an **integrated** network of **accessible**, and **affordable** internal, inter-island and external links, which will contribute to the development of a **safe, healthy, vibrant and inclusive** society, a **diverse, successful** and **self-sufficient** economy, and enhanced **environmental quality**.*

7.3 Principles

The following principles have been presented for the purposes of the RTS. This sets out the way that the RTP will work and the values that will be considered in the decision making process for transport related investments.

- **sustainability** - We will work to ensure that our actions are sustainable and meet the needs of the current generation of Shetland's people without compromising the ability of future generations to meet their own needs
- **accessibility and inclusion** - We will ensure that our actions improve Shetland citizens' ability to access services and will take account of all factors that create a barrier to this. We will encourage equal opportunities for all.
- **accountability** - We will make ourselves answerable to the communities and people of Shetland and keep them informed of, and seek their views on, what we are doing.
- **partnership** - We will work together with our partners and Shetland's people to achieve our vision and will encourage communities to realise their important role in development of the transport system
- **evidence-based** - We will ensure that our actions are based on clear evidence and information and are derived from what the community wants, with investment decisions based on an objective appraisal process.
- **efficiency** - We will aim to be as efficient as possible with resources and use them to provide as effective services as possible, maximising opportunity for external support.
- **compliance** – It is necessary to ensure that all RTP actions comply with legislative and regulative provision and competence.

8 Strategy Objectives

8.1

Introduction

A series of objectives have been developed taking into account consultation, problems and opportunities, constraints and uncertainties.

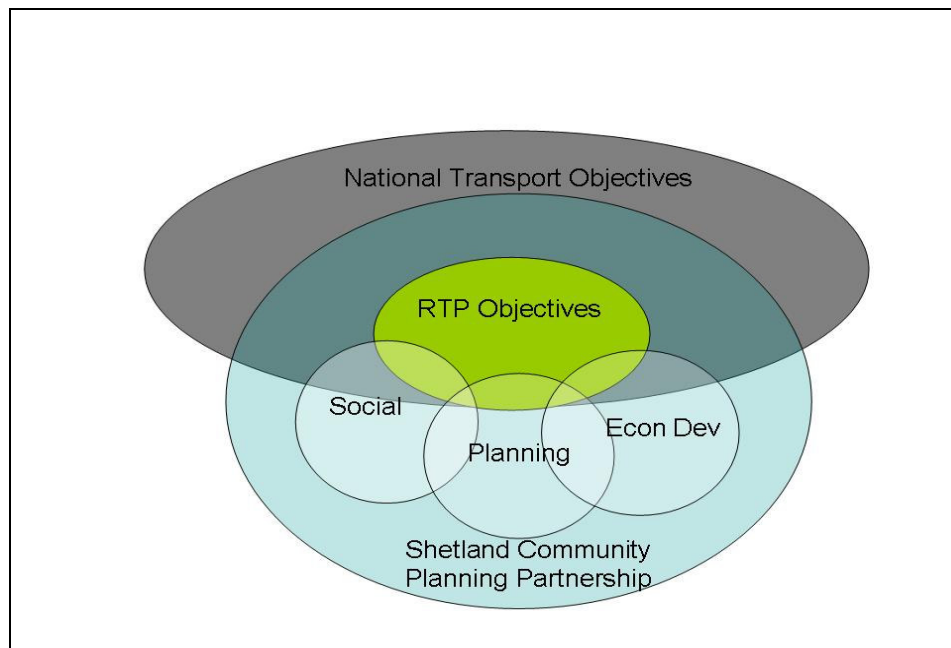
They have been developed with cognisance given to guidance provided within STAG, and RTS guidance, which highlights the following aspects:

- Objectives will steer the appraisal and prioritisation of projects and initiatives for transport in the region.
- Any targets associated with the objectives should be SMART – Specific, Measurable, Achievable, Relevant and Timed. They should also be challenging.
- They should be written in a way that it will be clear when they are achieved and that progress can be measured along the way.
- They may be presented as broad themes supported by a number of more precise objectives.
- They can be supported by lower-level targets and performance indicators for particular programmes or services.
- Objectives should focus on the key ambitions of the RTP, informed by the RTP's vision, problems identified and prioritised through the work on scoping, and by the 5 key objectives and National transport objectives of the Scottish Executive Ministers.

These objectives are specifically related to the how the RTS wants its transport network to develop. A series of external objectives are also identified in the following chapter, which help to identify where and how the transport system can help achieve wider objectives related to Shetland, such as Economic Development.

It is emphasised that the RTP objectives are related to wider objectives. They sit both within the objectives of the national transport strategy, but also importantly, should be wholly embraced by the Shetland Community Planning Partnership. In such a way, it is possible for other Shetland Strategies (such as planning, economic development, housing, etc) to complement the RTS. This relationship is shown in figure 8.1 below.

Figure 8.1 – Relationships of Objectives



8.2 Objective Development

We have developed sets of objectives to nest within each of the five national transport objectives. The objectives are expressed as outcomes – i.e. what we ultimately wish to achieve, rather than implying a particular solution at this stage.

We have tried to express them as simply as possible at this stage, relating each to a single concept. At this stage we have indicated the means by which the objectives will be measured. The objectives are presented in the following sections.

8.3 Economy

8.3.1 National Objective

To promote economic growth by building, enhancing, managing and maintaining transport services, infrastructure and networks to maximise their efficiency.

8.3.2 Shetland Context

In a Shetland context efficiency implies a particular responsibility to ensure the ongoing reliability, affordability and effectiveness of services and networks which are uniquely vulnerable to weather and natural forces and often costly to provide. The partnership will give priority to maintaining affordable fares on external and internal services.

Objective	Indicator
1. Work to ensure ongoing reliability of the island transport networks.	<i>Reliability monitoring</i>
2. Work to ensure that external and inter-island ferry and air links, are affordable to all (passengers, livestock and freight)	<i>Monitoring changes in fares</i>
3. Work to improve the robustness of the transport system (public and private) against significant potential increases in fuel prices	<i>Fuel efficiency monitoring</i>
4. Support measures that efficiently address current and anticipated capacity constraints on the islands' transport links	<i>Monitoring of vehicle and passenger utilisation</i>
5. Deliver a transport system that is economically efficient, maximising the overall benefits across each of the five main objectives for a given sum of investment	<i>Transport economic efficiency appraisal for major investment</i> <i>Best Value indicators for roads and public transport</i>
6. Work to optimise the wider economic benefits of the external links for Shetland	<i>Ongoing appraisal and evaluation programme with partners</i>
7. Work to achieve beneficial service development and market growth on Shetland's public transport networks	<i>Monitoring of passenger numbers.</i>

8.4 Social Inclusion and Accessibility

8.4.1 National Objective

To promote social inclusion by connecting remote and disadvantaged communities and increasing the accessibility of the transport network.

8.4.2 Shetland Context

Social inclusion has a very direct relevance for Shetland in that the provision of reasonably convenient and economical services to small and scattered communities is particularly difficult. The maintenance of transport services are essential to all Shetlanders but are unavoidably more expensive to provide because of remoteness and dispersion and the frequent need for air and ferry crossings. To achieve this shared objective the Partnership will seek imaginative solutions to the problems associated with serving small populations in remote communities and will consider how the need to travel can be reduced, for example by new forms of service delivery.

Objective	Indicator
1. Support the retention of measures to ensure continued operation and availability of external, inter-island and internal lifeline freight, livestock and passenger services and infrastructure to specified service levels	<i>"Expiry date" for service under do-nothing scenario</i>
2. Support measures to ensure access for all on the transport network	<i>DDA compliance</i>
3. Seek to ensure that the timings and frequency of internal and external passenger services take account of specific requirements of those accessing essential health and welfare services in Shetland and on the Scottish Mainland	<i>Change in trip profiles (costs, time, difficulty) to selected key destination</i>
4. Maximise accessibility (frequency, operating day, service delivery options) to and from each community within constraints of funding, demand, technical and operational feasibility, and taking account of convenient access to essential services, and the social and economic well-being of the community.	<i>Length of operational day No of trip opportunities</i>
5. Work to improve accessibility for vulnerable groups to essential services	<i>Ability to address specific groups of people, or areas.</i>

8.5 Environmental Protection

8.5.1 National Objective

To protect our environment and improve health by building and investing in public transport and other types of efficient and sustainable transport which minimise emissions and consumption of resources and energy.

8.5.2 Shetland Context

In a Shetland context, environmental quality is a particular concern. However, any responsible transport strategy must also address the contribution that local action can make in addressing the global impact of transport. The Partnership will give particular attention to safeguarding the environmental qualities of Shetland in its transport strategies, minimising the potential impacts of projects and services on the landscape, wildlife and archaeology of the islands. In order to address global concerns, the Partnership will seek to promote transport technologies and modes that minimise emissions. This will include encouraging the use of alternative fuels, car sharing, walking and cycling. Such an approach will complement efforts to improve health and to offer 'greener' tourism opportunities.

Objective	Indicator
1. Reduce carbon dioxide and greenhouse gas emissions, and the consumption of non-renewable resources arising from transport, travel and infrastructure in control of the Council and its Partners	<i>Fuel consumption and fuel efficiency</i>
2. Encourage and facilitate reductions in carbon dioxide and greenhouse gas emissions, and the consumption of non-renewable resources arising from transport and travel in control of private users and other operators.	<i>Fuel consumption and fuel efficiency</i>
3. Encourage and facilitate walking and cycling for short trips	<i>Provision of facilities and local monitoring</i>
4. Minimise impacts of transport and associated infrastructure on the coastal and marine environments	<i>Design and SEA, EIA Baseline and project monitoring</i>
5. Reduce impacts of transport and transport infrastructure on landscape, the historic environment and biodiversity	<i>Design and SEA, EIA Baseline and project monitoring</i>
6. Support species native to Shetland through roadside Biodiversity Action Plan and appropriate management and maintenance of road network	<i>Operational guidance, design and EIA Baseline and project monitoring</i>
7. Encourage design of transport infrastructure that is appropriate to Shetland	<i>Design and EIA Baseline and project monitoring</i>
8. Seek to minimise the adverse affects on natural drainage systems from roads run-off	<i>Design and EIA Baseline and project monitoring</i>
9. Seek to reduce the vulnerability of transport / infrastructure to climate change	<i>Design and Planning Process</i>

8.6 Safety

8.6.1 National Objective

To improve safety of journeys by reducing accidents and enhancing the personal safety of pedestrians, drivers, passengers and staff.

8.6.2 Shetland Context

This general Ministerial objective will run through all strategy and operational decisions which the Partnership will make.

Objectives	Indicator
1. Ensure compliance with internal and external safety and security requirements	Yes / No
2. Implement measures that seek to achieve National Road Safety Targets	Road Safety Monitoring
3. Encourage the elimination of drink driving	Road Safety Monitoring
4. Encourage improvement in seat belt compliance	Road Safety Monitoring
5. Implement measures to reduce fatalities, particularly in single vehicle accidents	Road Safety Monitoring
6. Discourage excessive and inappropriate vehicle speeds.	Road Safety Monitoring

8.7 Integration

8.7.1 National Objective

To improve integration by making journey planning and ticketing easier and working to ensure smooth connection between different forms of transport.

8.7.2 Shetland Context

Transport integration by the alignment of timetables, ready provision of passenger information and through-ticketing is again of particular importance to Shetland where transitions between road transport, air and ferry services and longer travel distances are – by the nature of the islands - much more frequent than is typically the case throughout Scotland.

Objectives	Indicator
1. Deliver effective and integrated public transport links to and from Shetland's principal passenger transport terminals at Sumburgh and Holmsgarth, with the inter-island ferry service terminals, and the inter-island air service.	<i>Public Transport trip opportunities for incoming and outgoing services</i>
2. Deliver effective transport integration opportunities and facilities at Shetland's principal passenger transport terminals at Sumburgh and Holmsgarth, and at Lerwick.	<i>Facilitation of multi-modal opportunities</i>
3. In partnership with other RTPs, encourage effective transport integration opportunities at Shetland's principal Mainland ferry terminals and airports.	<i>Ease of access to multi-modal opportunities at mainland terminals</i>
4. Maintain integrated freight facilities at each relevant ferry terminal.	Y/N
5. Deliver integrated and multi-modal ticketing across Shetland's public transport network.	Y/N
6. Provide effective journey planning information for visitors and residents for trips within, to and from Shetland.	<i>Tourism survey; resident survey – user and non-user</i>

9 External Objectives

9.1 Introduction

In addition to the RTS transport objectives outlined above, it is recognised that other relevant policy documents identify how the transportation system can be used as a means to achieve other wider objectives. A review has been undertaken of other local strategies, such as the Structure Plan, the Economic Development Strategy, and the NHS Shetland 2020 Vision. The main objectives, which it is believed the RTS can assist in delivering, are highlighted below.

9.2 Land Use – Structure Plan and Local Plan

The majority of policies in the Structure Plan and Local Plan are relevant to the RTS. The Transport Topic Goal in the Structure Plan is to deliver an integrated transport system that meets the needs of Shetland people and seeks to minimise impact on the environment, and reflect the transport aims and objectives previously outlined.

The following Structure Plan policies appear most relevant to the implementation of the RTS.

- General Development Policy – Sustainable Development GDS1
 - Development will be planned to meet the economic and social needs of Shetland in a manner that does not compromise the ability of future generations to meet their own needs and to enjoy the area's high quality environment. All development must therefore protect environmental assets as defined in the Structure Plan and Local Plan, use and conserve resources wisely, and minimise environmental impacts.
- General Development Policy – Existing Settlements GDS3
 - New residential, cultural, educational and community developments will be encouraged in or adjacent to existing settlements that have basic services in order to enhance their viability and vitality. In consultation with local communities a zoning strategy will be developed which identifies preferred locations for residential development throughout Shetland. Isolated development in the open countryside will be discouraged.
- General Development Policy – Social Inclusion GDS5
 - New Development will be assessed in terms of its accessibility and the positive contribution it makes to the social well-being of the whole community.
- Energy – Policy SP ENG5
 - Proposals which seek to minimise energy consumption by means of location, layout, design, construction and alternative technology will be considered favourably where the proposal does not conflict with other Structure and Local Plan policies.
- Business and Industry – Policy SP IND1
 - This policy “accepts the need for locally based employment generating initiatives that can diversify the economic base of the rural areas”.
- Tourism – Policy SP TOUR1
 - This policy supports high quality tourism development proposals particularly those which “are accessible by means other than a private car and where possible to the wheelchair bound and disabled”.
- Commercial Development – Policy SP COM1
 - The Shetland Local Plan will contain policies that seek to ensure that:
 - a) convenient access to shops is available to every inhabitant of Shetland including those without access to a car;

- b) the viability and vitality of Lerwick Town Centre is protected and enhanced;
 - c) developments that are considered to have an adverse impact on the viability of rural shops and post offices will be resisted; and
 - d) the creation of commercial employment opportunities in existing rural settlements will be encouraged, including home working, where it does not conflict with residential amenity.
- Housing – Policy SP HOU3
 - The Council will seek to maintain the viability and vitality of existing settlements. The Shetland Local Plan will establish zones and policy criteria for new housing development which:
 - a) In zone 1 encourage new houses in areas where facilities and services are present, including previously developed land within existing settlements;
 - b) In zone 2 favourably consider new houses in areas of population decline or instability;
 - c) In zone 3 favourably consider new houses which strengthen and reinforce existing building groups in the areas surrounding Lerwick;
 - d) In zone 4 strictly control new houses in the open countryside.
- Community Services and Facilities – Policy SP CSF1
 - To maintain the vitality and viability of the rural areas, the Council will continue to support and invest in the existing network of schools and the communities that they serve.
- Community Services and Facilities – Policy SP CSF3
 - The Council will seek to enhance, support and protect services, especially those which contribute to the social and economic development of communities, in locations which are the most accessible to users unless:
 - a) It can be demonstrated that the facility will not be required in the future by the community or;
 - b) Provision for replacement facilities is made elsewhere within the locality.

9.3

Economic Development Strategy - Shetland 2012

Key economic development priorities which offer scope for the RTS to help to deliver are outlined below.

9.3.1

Improving Our Communication Links with the Outside World

The task is to ensure that Shetland has access to transport and communication links that are of high quality and support economic and community development.

- Continuing to press for external air and sea services that meet Shetland's business and social needs;
- Encouraging the provision of external transport services that are safe, reliable, economical and of good quality and working with other areas across the Highlands and Islands to promote measures, including Public Service Obligations, that will recognise the lifeline nature of such services;
- Promoting Sumburgh as Shetland's principal airport and supporting proposals for the maintenance and development of its facilities, whilst also recognising the valuable role played by Scatsta Airport in support of the oil industry and its ability to provide a limited diversionary facility for Sumburgh;
- To press for the effective maintenance, development and marketing of external and international air and ferry services;
- To encourage the provision of satisfactory connecting freight and passenger services from Aberdeen to the rest of the UK and abroad;
- To ensure, through survey, investigation, dialogue and consultation, that the Community has an accurate picture of Shetland's external transport needs;
- To press for adequate facilities on external transport services for all who have special needs, including those with a disability; and

- Seeking to ensure that Shetland is connected to the remainder of the UK by high quality electronic communication links capable of supporting the full range of information technology activities.

9.3.2 *Diversification*

The task is to broaden Shetland's economic base, create quality jobs and allow the population to be much less dependent upon a narrow band of industrial sectors.

- Promoting the development in technology, particularly distance working associated with better communication links; and
- Maximising Shetland's potential at the crossroads of the North Atlantic.

9.3.3 *Strengthening Rural Communities in Shetland*

The task is to foster sufficient economic activity in the remoter parts of Shetland to ensure that rural communities remain and/or become places where people can live and work with good career prospects.

- Supporting the retention and promoting the sustainable growth of key rural industries including agriculture, aquaculture, tourism, culture and heritage, renewable energy and recycling;
- Decentralising public sector employment; and
- Maintaining local transport provision, infrastructure and essential rural services.

9.4 **Economic Development – Shetland Enterprise Business Plan**

The business plan is split into four strands – Growing Business, Global Connections, Skills and Learning, and Strengthening Communities. Relevant strategic priorities include the following.

9.4.1 *Growing Businesses*

- Provide financial support for research and development into emerging renewable energy technologies.
- Improve the quality and breadth of the tourism product, including the development of niche market tourism.
- Encourage the use of local products by linking producers, hotels and restaurants with external expertise.

9.4.2 *Global Connections*

- Support the development of broadband infrastructure including roll out to rural areas to enable the 'connecting of communities'.
- To make the most of Broadband opportunities through advice and training in the move towards the knowledge economy.
- Encourage the development of virtual learning to reduce the impact of peripherality constraints.
- Work in partnership with Shetland College to expand the skills base of the renewable energy sector.
- Support the development of a centre of excellence for renewable technologies.
- Encourage external transportation link improvement including appropriate route development and affordable transport. Capitalise on Scandinavian links.
- Attract and promote job dispersal and inward investment through financial support and targeted information.
- Advocate population retention and growth as a policy objective, particularly for rural communities.
- Work with Community Planning partners to promote Shetland as an attractive place to live, learn and work.

9.4.3

Strengthening Communities

- Work in partnership to develop creative solutions to the lack of childcare facilities and services in rural areas.
- Encourage the development of activity that opens up income generating streams for community enterprises with targets on approval.
- Increase community capacity through encouraging and supporting schemes and initiatives such as the Initiative at the Edge, Community mentoring and Community agents.
- Provide support for the Initiative at the Edge groups and encourage activities that will develop income generating streams and create employment.
- Target support to projects involving young people, women, and men leaving traditional industries.
- Encourage the development of sustainable community led tourism projects that support tourism at a Shetland wide level, particularly projects that promote the natural environment and innovative approaches to its interpretation.
- Focus on developing social and community enterprise activity to encourage development into sustainable small businesses with global opportunities and potential. This includes the support of community led projects such as music developments, IT, renewable energy and market-led sustainable craft businesses.
- Assist in the promotion and development of Shetland as a green community.

9.5

Local Housing Strategy 2004-2009

On the whole, recognition of how the transport system can assist with the delivery of the objectives of the Local Housing Strategy (LHS) was limited. Furthermore, the objectives of the LHS were very specific and it is difficult to see how transport can contribute to the delivery of these.

Objectives of the Housing Strategy include:

- Improving access to housing in Shetland across all tenures.
- Support the long-term future of our communities.
- Provide inclusive housing services to meet the needs of particular groups.
- Address anti-social behaviour in our communities.
- Meet targets to eradicate fuel poverty in Shetland.
- Support high quality housing standards across all tenure types.

However, through discussions with officers from SIC's housing department and through some of the consultation findings presented within the LHS, some key areas where transport can assist in the delivery of the LHS are identified, as set out below.

- There is a need to reduce the demand for housing in Lerwick, and this can be achieved through reducing migration towards Lerwick, such as through the decentralisation of jobs; support for smaller and more remote local communities; ensuring that there is adequate transport across Shetland, perhaps using smaller community buses/cars.
- Areas where houses remain unoccupied for a long time tend to be in outer areas furthest away from Lerwick. There are a lot of unoccupied houses in the west mainland for example, which has a single track road and subsequently seems more remote. Therefore, improved transport links could perhaps help overcome the perceptual barriers of living away from Lerwick.
- It was also pointed out that it is traditional for Shetlanders to build their own houses, but the costs of transport make it more difficult to encourage development in more remote rural areas. Therefore, in order to encourage people to move into more remote areas, perhaps discounted transport costs could be investigated.

9.6

Corporate Plan 2004-2008

A review of the Council's Corporate Plan has revealed further objectives that the RTS will play a vital role in delivering. These include:

- **Improving external communication links with the rest of the world to help competitiveness**, through continuing to press for external air and sea services that meet Shetland's business and social needs including Public Service Obligations (PSOs) and

seeking to ensure that Shetland is connected to the UK by high quality electronic links to enhance business use of technology.

- **Strengthening rural economies**, through supporting commercial activities throughout Shetland, with preferential assistance for remote areas and seeking to decentralise some public sector employment away from Lerwick.
- **Provide a sustainable and easy to use internal transport system for transporting freight and people**. This will be achieved through continuing to improve roads, improving our systems of public transport, sustaining inter-island communications and seeking improvements with fixed links, where appropriate, starting with the Bressay Bridge.

9.7

NHS Shetland 2020 Vision

The NHS 2020 Vision outlines the strategic approach undertaken by NHS Shetland to healthcare provision on the island.

By 2020, NHS Shetland's vision for healthcare transport involves:

- **Integrated Community Transport System**, comprising a flexible range of transport to link sea, air and land travel. This vision includes buses or community cars linking to ferries and planes, bookable and regular, at reasonable cost/subsidised. The vision also recognises that these transport services need to accommodate various working patterns and be suited to the needs of individual areas of Shetland.
- **Improved Transport Options for Older People and Those with Disabilities**, in order to provide higher levels of accessibility to key services and amenities for these groups. It is proposed that this could be achieved through the introduction of a reduced rate taxi card scheme for individuals with long term health conditions or disabilities and through encouraging local supermarkets/shops to provide home delivery services.
- **External Links that are Quicker, Cheaper and Not Weather Dependant**, through for example, encouraging other European or UK companies that currently provide services to Mainland Scotland to break the current monopoly, or to look for national policy to reduce costs. Cheaper air and ferry services will be essential if Shetland's economy is to place a stronger reliance on tourism. More efficient external links can also help in recruitment and retention of staff for health services and other essential service areas.
- **Better transport infrastructure within Shetland**, including fixed links (bridges or tunnels) to some of the outer isles, for instance to connect Unst and Yell, Yell to the Mainland, or Bressay to Mainland are possibilities for future that NHS Shetland envisage could deliver better transport infrastructure. Fixed links would be beneficial in providing road ambulance services across Shetland, removing the need to rely on ferry services that can be heavily disrupted by weather. In this way, improved infrastructure within Shetland would help in the delivery of health services in these more remote areas.
- **Redesign and Share Current Resources**. It is recognised that there are a range of local transport initiatives already in place in Shetland, including school transport, local community and commercial transport. NHS Shetland have identified some very innovative schemes to link transport in the rural areas to services and community needs, such as drive-home schemes from alcohol related social activities and subsidised transport for youth and leisure activities. The challenge for the future will be to redesign current local systems, to find opportunities for collaboration and joint ventures that can contribute towards an integrated community transport scheme for Shetland.

10 Option Generation

10.1 Introduction

This chapter outlines the process that has been used to develop the alternative strategic packages, and the individual schemes which make up these packages.

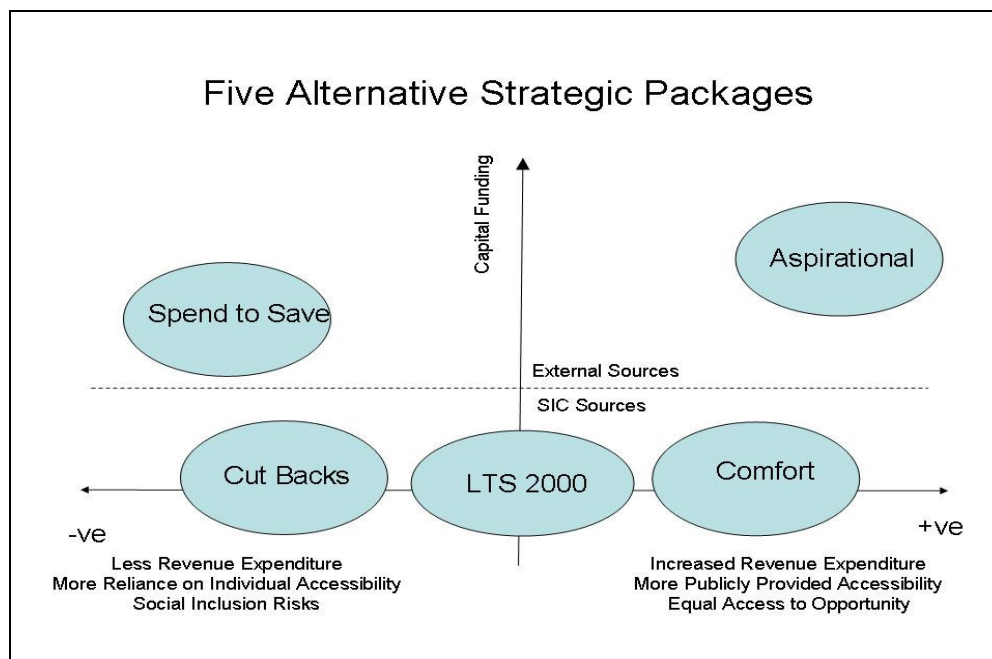
10.2 Identification of Alternative Strategic Packages

The alternative approaches require to be meaningful and realistic within the context of the Shetland RTS, and help direct the strategy where there are clear choices to be made.

It is apparent that the key strategic choices are not between, for example, *a strategy that seeks to promote economic growth*, or *an alternative strategy that seeks to protect the environment*. Previous work tends to underline that an appropriate balance is required between each of the different elements, in a way that is compliant with national objectives, and the local context. Such an approach forms the basis of the current LTS and development plans. Going forward, key strategic choices appear to relate to:

- The level of service that is provided to rural areas and island communities, impacting upon accessibility and social inclusion;
- The availability and prioritisation of revenue funding support available to support the maintenance and development of the transport network;
- The availability and prioritisation of capital funding and investment for the transport network (from SIC, and from external sources).

These different approaches have been combined to develop a choice of five different strategic alternatives, based upon varying the different elements above. Five alternative scenarios, loosely based around funding possibilities, have been developed for the purposes of the RTS. They are shown diagrammatically below in figure 10.1.

Figure 10.1 – Alternative Strategic Packages

These are:

1. LTS 2000 Rolled Forward (i.e. continuation of 2000 LTS approach, or 'Do-Minimum' e.g. implies a continuation of current approach to rural accessibility and spending priorities).
2. Cut Backs (i.e. options designed to reduce revenue or capital finances to levels which were available, implying reduction in rural accessibility, and a greater reliance on private transport).
3. Spend to Save (i.e. development of capital infrastructure in the short term in order to save revenue finances in the longer term. Could also include measures to generate income).
4. Comfort (i.e. an improvement of current levels of service and hence improved levels of rural accessibility based on increase levels of revenue expenditure e.g. build on the premise that the RTP would receive more revenue).
5. Aspirational (i.e. a scenario including all of the potential strategies and options that the RTP would wish to implement if there were no financial constraints i.e. reliant on the RTP receiving more revenue and more external capital).

A more detailed explanation of the scenarios and some example options are presented in Table 10.1.

10.3

Identification of Individual Schemes

In parallel to the process of developing alternative strategic approaches, a long list of possible schemes for inclusion under each of the five strategic approaches was developed during the workshop process.

In line with the philosophy of STAG, a very open minded and objective approach has been taken to consider the full range of options that exist under each of the five alternative strategic packages, including those which are clearly controversial. The appraisal process would be undermined if the full range of options were not considered at the outset.

The following sections explain the range of sources used to develop this initial long list of options.

10.3.1 *Establishing the Do-Minimum - Review of Previous LTS*

First it has been important to identify the current approach and options or strategies taken to transport in Shetland in order to establish the 'do-minimum' situation, as this provides a useful benchmark to compare the other scenarios and options. This 'do-minimum' scenario is based on a continuation of the approach stated in the current Shetland Local Transport Strategy (LTS) which was developed in 2000. Therefore, a review was undertaken of this document and a detailed list of the options or strategies held within this document was noted.

This list was then confirmed at a workshop with officers of the Transport Strategy Working Group to establish if the options identified were still relevant to move forward with and if there were any other policies or options that should be noted as part of the 'do-minimum' approach. In short, there were a couple of amendments to this list, such as noting the development of the Bressay Bridge, and tendering of the Foula Ferry service, but on the whole it was confirmed that the approach outlined in the 2000 LTS still stood and acted as a suitable do-minimum study upon which to progress the option development stage.

10.3.2 *Generating Options for the Alternative Scenarios – Review of LTT*

In order to develop alternative and sometimes more innovative transport options for the different RTS scenarios, a variety of good practice guides have been examined. In particular articles from the past year or so have been consulted to identify some of the more innovative responses to rural transport problems in other parts of the United Kingdom.

The options developed ranged from the provision of flexible transport services and demand responsive services, to measures to identify transport problems through the use of Geographical Information Systems (GIS) and other accessibility planning tools. Freight services, travel plans, car-sharing schemes, public transport information improvements, measures to promote the use of bio-fuels and initiatives to improve road safety have also been considered. Best practice examples of mobile services and the use of new technology have also been reviewed. It should be highlighted that many of the initiatives examined are similar to some of the current schemes and initiatives that Shetland Islands Council already operate, which emphasises that there is a lot of good transport provision already offered and it will be for the RTP to build upon this.

10.3.3 *Generating Options for the Alternative Scenarios – Review of Consultation Findings*

In addition to generating options through a review of various best practice sources, the review of consultation findings has proved just as important, if not more so, to develop options within each of the scenarios. It is to be reminded, for example, that a purpose of the consultation process was not simply to identify transport barriers and problems, but also to identify opportunities from a users perspective. Accordingly, a wide variety of comments on how transport services in Shetland could be improved were offered by consultees and many of these suggestions have been included in the long list of options generated under each of the scenarios.

10.3.4 *Transport Strategy Workshops*

The Transport Strategy Working Group was consulted, comprising employees from across the Council's departments, including Planning, Housing, Public Transport, Ferries, Roads, Economic Development, Capital Projects, Infrastructure Services, Community Planning, as well as representatives from the other members of the RTP – Shetland Enterprise and Shetland Health Board.

Meetings with the Working Group have taken the form of workshops in order to debate a variety of tasks, including the development of the vision and objectives matrix, and the development of options or strategies for inclusion in the different RTS scenarios.

As indicated, this group were used to establish the do-minimum situation by confirming the existing approach. The group also offered suggestions for options under each of the alternative scenarios. One of the benefits of the workshops is that it is made up of officers

from a diverse range of backgrounds, which has ensured that a broad range of options has been considered.

Tables 10.2 to 10.4 present the long lists of options developed under each of the scenarios, including the do-minimum scenario which, as stated, has been developed following a review of the 2000 LTS and subsequent discussions with the officers of the Transport Strategy Working Group.

10.4 Next Steps

The initial identification of the long list of possible options presented in tables 10.2 to 10.4 paves the way for:

- Confirmation of appraisal approach and appraisal framework;
 - Option sifting and development;
 - Initial appraisal of alternative strategic packages;
 - Appraisal of individual elements;
 - More detailed appraisal of preferred strategic package; and
 - Development of preferred implementation plan, taking into account appraisal outcomes, affordability issues, and deliverability considerations
- These issues will be dealt with in the Appraisal Report.

This work will be undertaken in parallel with the development of the SEA.

Table 10.1: Summary of Scenarios developed for Appraisal

Scenario 1: LTS Rolled Forward	<p>This is the 'Do-Minimum' approach involving a general continuation of policies and strategies set out in the previous Local Transport Strategy (LTS) in addition to some of the more recent measures that SIC are implementing since the production of the previous LTS in 2000. This scenario would involve a continuation of historic spending patterns.</p> <p>In terms of external links, there is very little that can be done since the RTP's influence is limited mainly to lobbying for improvements. Therefore, as part of this scenario, the RTP would continue to press for accessible, affordable and reliable external transport services that meet the needs of both passengers and freight service providers. The importance of retaining direct links into Europe would also be emphasised within this scenario. A notable action included in this scenario would be the initiation of an extensive origin-destination study (looking at locals, tourists, and business visitor trips etc) to examine views on the ferry and air services, to investigate if the range of destinations is correct, and to establish the reasons why people travel to and from Shetland.</p> <p>With regards to inter-island links, a continuation of existing policies would include maintaining the current levels of air and ferry services afforded to Shetland's outer isles. In order to do this, Shetland's existing ferry fleet would be replaced at the end of their lifetimes, and ongoing corresponding terminal improvements would be commissioned as required.</p> <p>At the internal level, the RTP would continue to promote measures that encourage walking and cycling. The current extensive levels of bus service that is provided throughout Shetland would be maintained, along with the network of more flexible buses such as shopper, community and dial-a-ride buses. Measures to increase travel awareness, promote the use of environmentally friendly fuels, and to generally reduce the need to travel, such as through decentralisation, would also be promoted within this scenario. The RTP would also continue the current policy of roads maintenance and improvement, with priority centred on the spine road network.</p>
Scenario 2: Cut Backs	<p>This scenario has been designed in recognition that the current pattern of spend to maintain the existing transport infrastructure and services in Shetland could be financially unsustainable if revenue reductions were necessary. This scenario would be based on the premise that the RTP would receive less revenue (i.e. SIC funds) and no extra capital from external sources (i.e. Scottish Executive, European funding). Accordingly, the options below are those that seek service optimisation and efficiencies.</p> <p>There is relatively little scope to make any cuts to the external transport network since these are operated by external operators.</p> <p>On the other hand, the inter-island ferry and, to a lesser extent, air services provide scope to make financial savings. This scenario would entail, for example, the reduction of air services, and ferry services, which would be achieved through reducing the ferry hours of operation, fewer sailings, and fewer vessels. Other operational choices could also be pursued to reduce ongoing costs, including fare increases.</p> <p>With regards to the internal transport service, the public transport service presents an opportunity to reduce costs, such as through the removal of bus services to outlying rural areas as well as through reductions in service frequency, or increases in fares.</p>

Table 10.1: Summary of Scenarios developed for Appraisal (continued)

Scenario 3: Spend to Save	<p>The options or strategies advocated in this scenario would be those that may incur a high capital cost in the short term, but which would have significant cost savings overtime. Measures to generate income may also be considered as a means to save money. Therefore, this scenario is built on the premise that the RTP would receive less revenue but would receive external capital that could be used to develop the infrastructure that could achieve revenue savings in the long run.</p> <p>Again, with regards to external transport services, there is relatively little scope to spend to save since these services are managed by external operators.</p> <p>Similar to the cut-backs scenario, the inter-island links provide the greatest opportunity to spend to save, namely through the development of fixed links. For example, whilst the development of tunnels (or bridges) would incur a high capital cost from the outset, over time, savings could be made through the removal of ferry services, and the need to fund ongoing replacement vessels every 20 to 25 years. At the same time, it is to be highlighted that the impacts of removing ferry crews could have wider economic impacts on the islands. Alternatively, the use of larger vessels with reduced frequencies may also reduce costs, if they replace two smaller ferries.</p> <p>In reference to internal transport services and specifically public transport, it is believed that establishing a transport brokerage scheme could help to save costs in the long term by replacing some conventional timetabled bus services with a community services or demand responsive services managed through a shared database, making best use of existing resources. Alternatively, substantial increases in bus fares could potentially generate savings. Parking charges could also be implemented as a means to generate income.</p> <p>With regard to roads, the use of Capital funds to carry out a programme of heavy reconstruction could be used in the long run to reduce the roads maintenance budget below what it might otherwise have needed to be.</p>
Scenario 4: Comfort	<p>This scenario involves an improvement of current levels of service based on increasing the levels of revenue expenditure from the SIC. Accordingly, it is believed that this scenario would enable options to be implemented that would tend to improve/sustain rural accessibility. This scenario is built on the premise that the RTP would receive more revenue, but no extra capital.</p> <p>With regards to the external transport network, since the external services are operated by external operators there is little opportunity to influence change for these services.</p> <p>With reference to the inter-islands services, the comfort scenario could be used to provide a 24 hour ferry service, some extra sailings, and additional flights or cheaper fares.</p> <p>The provision of more demand responsive services, and shuttle services to key destinations such as health centres and Sumburgh Airport could be internal transport measures developed under the comfort scenario.</p>

Table 10.1: Summary of Scenarios developed for Appraisal (continued)

Scenario 5: Aspirational	<p>This scenario includes all the potential strategies and options that the RTP may want to implement if they had no financial constraints. More realistically, this scenario would be reliant on the RTP receiving more revenue and more external capital.</p> <p>Again, with regards to external transport services, there is relatively little scope to spend since these services are managed by external operators. However, from an aspirational viewpoint, it could be said that the RTP would have a greater influence over these services and therefore could deliver faster ferries with greater capacity and cheaper prices for the user. Further developments at Sumburgh could be considered.</p> <p>With regards to inter-island transport, aspirational options could include the implementation of fixed links, and fast modern ferries such as the Yell Sound ferries to each of the outer islands.</p> <p>Aspirational options for the internal transport network could include the provision of more frequent public transport throughout Shetland, including the most remote rural areas and the removal of fares. The implementation of radical initiatives, such as a mono-rail scheme would also fit into this scenario. Significantly improved road links throughout Shetland (dualling of single track roads), as well as extensive networks of walking and cycling paths would also be aspirational options.</p>
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Table 10.2: Elements likely to occur under different policy scenarios (External Links)

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
External Links - Air (Passenger)				
<ul style="list-style-type: none"> Continue to press for accessible, affordable and reliable air services that meet Shetland's social needs. Initiate an extensive origin-destination study (looking at locals, tourists, and business visitor trips etc) to examine views on the ferry and air services, to investigate if the range of destinations is correct, and to establish the reasons why people travel to and from Shetland. Promote Sumburgh as Shetland's principal airport and support proposals for the maintenance and development of its facilities. Press for adequate facilities on external transport services for all who have special needs, including those with a disability. Encourage the provision of satisfactory connecting passenger services from Scotland Mainland to the rest of the UK and abroad. Press for the effective maintenance, development and marketing of external 				<ul style="list-style-type: none"> Lobby for more favourable PSOs at Sumburgh Airport. Lobby for increased frequency of flights to and from Sumburgh Airport. Lobby for an increased range of destinations from Sumburgh Airport. Continue to lobby for reduced fares on flights to and from Sumburgh Airport (i.e. not just for islanders, but for all visitors). Lobby for the use of larger aircraft from Sumburgh Airport during the peak periods. Lobby for extended opening hours at Sumburgh Airport. Lobby for flight operators to redeem full price of air fares if public transport (including inter-island ferry and air services) cause delays that prevent islanders catching flights from Sumburgh. Increase marketing of Shetland, especially on arrival at Sumburgh. As the gateway to the island, more promotional material about transport links needs should be provided at Sumburgh

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
and international ferry services, including flexible ticketing initiatives. <ul style="list-style-type: none"> Press for improvements in integration opportunities from Aberdeen Airport 				Airport. <ul style="list-style-type: none"> Encourage stewards on flights to organise car-sharing for passengers. Further airport development
External Links - Air (Freight)				
<ul style="list-style-type: none"> Continue to press for external air services that meet Shetland's business needs. 				<ul style="list-style-type: none"> Provision of a dedicated air freight service (subsidised?).
External Links - Ferries (Passenger)				
<ul style="list-style-type: none"> Continue to press for accessible, affordable and reliable ferry services that meet Shetland's social needs. Initiate an extensive origin-destination study (looking at locals, tourists, and business visitor trips etc) to examine views on the ferry and air services, to investigate if the range of destinations is correct, and to establish the reasons why people travel to and from Shetland. Press for adequate facilities on external transport services for all who have special needs, including those with a disability. Encourage the provision of 				<ul style="list-style-type: none"> Lobby for more Shetland only sailings (i.e. fewer Orkney callings). Lobby for more cabins. Lobby for reduced fares on ferries.

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
<p>satisfactory connecting passenger services from Aberdeen to the rest of the UK and abroad.</p> <ul style="list-style-type: none"> Press for the effective maintenance, development and marketing of external and international ferry services, including flexible ticketing initiatives. Press for improvements in integration opportunities from Aberdeen Harbour to the Guild Street bus and rail stations. 				
External Links - Ferries (Freight)				
<ul style="list-style-type: none"> Continue to press external ferry services that meet Shetland's business needs. Encourage the provision of satisfactory connecting freight services from Aberdeen to the rest of the UK and abroad. 				<ul style="list-style-type: none"> Establish forum/discussion group for freight users and ferry operator to discuss problems or opportunities etc.
External Links - Ferries (to Europe)				
<ul style="list-style-type: none"> Continue to recognise the importance of direct links with Scandinavian neighbours. 				<ul style="list-style-type: none"> Lobby for the development of routes from Lerwick to a wider range of European destinations.

Table 10.3: Elements likely to occur under different policy scenarios (Inter-Island Links)

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
Inter-Island Links - Ferries				
<ul style="list-style-type: none"> Continue existing high levels of ferry service to the outer isles Continue to replace ferry and terminals at the end of their lifespans. Continue to implement short-term cost interventions to areas on the edge (i.e. Unst/Fetlar). Tender services for outer islands which wish to pursue this route (i.e. Foula). Continue to update the electronic ticketing system operated on the ferry services to ensure integration with other public transport services Continue to implement VMS to improve information on ferry services. Continue to comply with DDA regulations through staff training initiatives 	<ul style="list-style-type: none"> Reduced frequency of service Reduced crew size Replacement of Island crews with Mainland crews only Reduced vessel numbers Shared use of vessels for small isles Change ship regimes and status 	<ul style="list-style-type: none"> Use of larger vessels but with reduced frequency Introduce more fuel-efficient vessels. Increase passenger and vehicle fares Increase other costs on ferry services i.e. food and drink Increase costs at peak times only. Promote the use of the ferries for other purposes such as meetings and conference venues. 	<ul style="list-style-type: none"> Increased frequency of ferry services (i.e. 24 hour operation). Provide extra sailings (i.e. during tourist season). 	<ul style="list-style-type: none"> Introduction of larger, faster and more efficient vessels on all routes (i.e. provision of Yell Sound ferries on all routes). Consider innovative high speed vessels Island based crews. Increased frequency of ferry services (i.e. 24 hour operation). Encourage the development of ferry transport groups (i.e. like the Yell Commuters group) as a forum to report transport issues through the respective Community Councils. Removal of fares on all ferry services.
Inter-Island Links - Air				
<ul style="list-style-type: none"> Continue existing high levels of air service to the outer isles. Continue to offer lower air fares for island residents on inter-island flights. Continue to provide grant 	<ul style="list-style-type: none"> Reduced level of air service to islands Removal of air service from some islands Replacement of inter-islands air service with helicopters 	<ul style="list-style-type: none"> Increase passenger and freight fares. Purchase of RTP aircraft. Introduce booking fines for those who book flights to islands but do not take them 	<ul style="list-style-type: none"> Increase frequency of air service to inter-islands 	<ul style="list-style-type: none"> Increase frequency of air service to inter-islands Introduce services to Orkney from Fair Isle Removal of fares on all air services. New air strips (i.e. Fair Isle)

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
funding for Airstrip Trusts to maintain island air strips. • Consider options for the future use of Unst Airport	• Shared use of aircraft fleet with Orkney Islands • Consider future options for mainland airport	up and fail to cancel.		• Offer air fare incentives to encourage tourists to stay overnight on the small isles. • Lobby for air service operator to improve communication with passengers (i.e. booking confirmation)
Inter-Island Links – Fixed Links				
• Development of Bressay Bridge		• Implementation of fixed links <ul style="list-style-type: none"> ○ Yell to Mainland ○ Yell to Unst ○ Whalsay to Mainland • Establish a consortium or fixed links forum with other island Local Authorities in order to share knowledge and resources. This could have equipment mobilisation benefits.		• Implementation of fixed links <ul style="list-style-type: none"> ○ Yell to Mainland ○ Yell to Unst ○ Whalsay to Mainland • Establish a consortium or fixed links forum with other island Local Authorities in order to share knowledge and resources. This could have equipment mobilisation benefits.

Table 10.4: Elements likely to occur under different policy scenarios (Internal Links)

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
Internal Links - Walking and Cycling				
<ul style="list-style-type: none"> Continue to promote walking and cycling through improvements in infrastructure provision (i.e. cycle storage), route development (i.e. provision of rural footways and cycle paths), and information. Implement traffic management and calming techniques to improve the safety of pedestrians and cyclists. Undertake social crossing assessments. Develop links between cycling and public transport. 	<ul style="list-style-type: none"> Where new development is built, ensure that developers are responsible for the implementation of appropriate walking, cycling and traffic calming facilities. 	<ul style="list-style-type: none"> Increase the rural footpath network, particularly for access to key services in rural settlements i.e. schools, health and leisure centres, shops etc (i.e. improved local access could reduce the need to provide public transport services). 	<ul style="list-style-type: none"> Increase the rural footpath network, particularly for access to key services in rural settlements i.e. schools, health and leisure centres, shops etc. Increase programme of traffic calming. 	<ul style="list-style-type: none"> Increase the rural footpath network, particularly for access to key services in rural settlements i.e. schools, health and leisure centres, shops etc. Increase provision for cyclists, such as through dedicated cycle lanes in Lerwick and the provision of more cycle stands. Implement basic hard surfaces or 'French drains' in rural areas (rather than full bitmac footpaths) so to provide walkers with a safe pedestrian refuge on a surface that retains the rural feel of the area. Provide reduced bus fares for cyclists to encourage bikes on buses. Increase programme of traffic calming.

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
Internal Links - Public Transport				
<ul style="list-style-type: none"> Continue to provide an extensive level of bus service provision meeting as far as can be afforded, the needs and aspirations of each rural area. Improve access to Lerwick and key settlements through public transport improvements and provision of car parking. Continue to provide services for commuters, shoppers, elderly, and those with a disability to travel to and from Lerwick. Provide "community transport" services as required in each area and continue to work closely with the Community Transport Association to provide advice and assistance to local voluntary groups with regards to transport projects. Provide new bus shelters in line with expected regular passenger usage. Promote innovative and flexible public transport usage. Develop through ticketing initiatives Continue to produce public transport timetables each year, and distribute these at bus stops with high local/tourist usage and via the Council website. Continue to contribute to the development of the annual 'Guide to Concessions'. Encourage the development of 	<ul style="list-style-type: none"> Decrease public transport provision (reduced network operating hours; reduced coverage; and reduced frequency). Use smaller buses to operate rural services. Do not subsidise any dial-a-ride services or shoppers' services. Only provide timetables via the website or local press. School transport savings through establishing joint catchments. (Footpath improvements would also reduce school transport costs). 	<ul style="list-style-type: none"> Replace timetabled services with more flexi forms of transport such as Demand Responsive Transport (DRT) services and through promotion of post buses etc Introduce a transport brokerage scheme (i.e. community/dial-a-ride scheme, making best use of existing resources through a shared database. Introduce fuel efficient buses. Introduce smaller buses. Promote more mobile services through partners (i.e. NHS Shetland) Substantial increases in bus fares to generate income. Promote the multi-utilisation of Council vehicles. 	<ul style="list-style-type: none"> Increase public transport provision (increased network operating hours; increased coverage; and increased frequency) Introduce more late night and weekend bus services. Implement more DRT flexible transport services Introduce more feeder services and shopper services Introduce shuttle bus services to key services i.e. health centres. Provide dedicated executive coach service from Sumburgh Airport to Lerwick (i.e. in form of Tingwall dial-a-ride). Introduce concessionary fares for youths and other socially excluded groups (i.e. those on benefits). Introduce of a reduced rate taxi card scheme for individuals with long term health conditions or disabilities Increase distribution of transport timetables. 	<ul style="list-style-type: none"> Remove bus fares. Brokerage schemes (i.e. use of other service vehicles) Implement integrated ticketing initiatives (i.e. between bus and ferry trips, smartcard compatible, and enabling concessionary and school passenger usage on local bus services). Encourage the development of transport user groups (i.e. like the Yell Commuters group) as a forum to report transport issues through the respective Community Councils. Introduction of monorail system. Provide details on public transport services through the local press. Implement more DRT flexible transport services Introduce more feeder services and shopper services Introduce accessibility planning projects to identify areas where public transport should be targeted. Provide dedicated executive coach service from Sumburgh Airport to Lerwick (i.e. in form of Tingwall dial-a-ride). Establish more park and ride sites across the area Implementation of real time

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
<p>informal park and ride sites near rural road junctions.</p> <ul style="list-style-type: none"> Continue to comply with DDA regulations through staff training initiatives Instigate public transport assessments through the Community Councils, including the use of 'Community Travel' questionnaires. 				<p>bus information such as text messaging information at bus stops.</p> <ul style="list-style-type: none"> Implementation of bus timetables and maps at all bus stops throughout Shetland. Introduce flexi-tickets (particularly aimed at SIC workers) Allow for school bus passes to be used on service buses when pupils are attending after-school clubs. Offer free buses for travel to new jobs or interviews, with tickets issued to jobseekers directly through the Jobcentre Production of art exhibitions at transport waiting facilities i.e. Viking Bus Station, Tingwall Airport, Sumburgh Airport, and on Ferries. Use of bus stops to display other information (i.e. promote tourism). Increased use of renewable power at bus stops. Introduce bus buddying schemes to encourage socially excluded people and those with disabilities to use public transport. Convert all buses to hydrogen. Encourage local supermarkets/shops to provide home delivery services.

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
Internal Links - Travel Awareness				
<ul style="list-style-type: none"> As the major employer in Shetland, examine and implement a travel plan. Target other major employers (Health Board and Sullom Voe) for travel awareness campaigns and Travel Plans. Investigate the possibility of a Shetland wide car sharing club. Promote green travel plans. Reduce the need to travel through decentralisation of development. Support and promote safer routes to schools campaigns and other healthy living campaigns. Promote the use of greener fuels, such as LPG and assist in the introduction of LPG related supplies and services. 		<ul style="list-style-type: none"> Establish a discounted-parking scheme for environmentally friendly vehicles, with discounts dependent on vehicles VED (Vehicle Excise Duty) classification. Promote car-sharing/van-pooling (market car-sharing on the economic savings) and provide dedicated car-parking spaces for car-sharers. Establish 'borrow-a-bike' schemes available to all Council employees. 		<ul style="list-style-type: none"> Establish hot-desking space in communities where there is potential for decentralised working (more ICT). Develop a programme of speed awareness courses, used as alternatives to prosecution and based on referrals from Northern Constabulary. Offer assistance for petrol stations offering bio-fuels. Introduction of mobile facilities to reduce the need to travel for those in rural areas (i.e. continue to offer mobile library services). Convert all Council vehicles to LPG fuels
Internal Links - Roads				
<ul style="list-style-type: none"> In the Council's programme of road improvement and rebuilding, prioritise the maintenance of the spine road network and the provision of ferries. Actively encourage the use of appropriately sized vehicles in remote and sensitive locations. Continue to monitor road traffic volumes by way of continuous loop sites on the approaches to Lerwick and throughout Shetland. Continue to develop, where 	<ul style="list-style-type: none"> Reduce roads maintenance programme. Reduce winter maintenance programme. 	<ul style="list-style-type: none"> Charges for car parking in Lerwick Bans for bigger vehicles on certain roads (i.e. save money on repairs) or impose fines/charges to companies whose vehicles are responsible for road damage. Establish freight consolidation centres where small retailers collect their mail from a freight consolidation centre in an accessible location Promote collection points, whereby undeliverable bulky 	<ul style="list-style-type: none"> Road Improvements – surface and expansion works 	<ul style="list-style-type: none"> Provision of high quality, dual roads to all areas throughout Shetland. Introduce Intelligent Transport Systems, such as intelligent road studs and more VMS signs. Private companies to contribute to roads maintenance and repair costs. Promote a Hydrogen Economy Sensitive lighting (EW) Lobby for reduced fuel costs.

LTS Rolled Forward	Cut-backs	Spend to Save	Comfort	Aspirational
<p>appropriate, the use of community piers.</p> <ul style="list-style-type: none"> Continue to operate the part-time pedestrianisation of Commercial Street, to allow for deliveries and collections at certain times of the day only. Continue to provide new footways, lighting and other minor improvements in Shetland's network of small villages. Continue to licence taxi and private hire vehicles to meet local needs. Investigate the provision of taxi stances within the town centre. 		<p>mail can be left at a local store, PO, banks etc for collection at a later date (i.e. to reduce need for return travel).</p>		<ul style="list-style-type: none"> Target some of the harder to reach marketers by commissioning a 'dual fuel' network, which involves providing advice and guidance on the conversion process to LPG to taxis, the general public and small businesses in the area. Establish freight consolidation centres where small retailers collect their mail from a freight consolidation centre in an accessible location Promote collection points, whereby undeliverable bulky mail can be left at a local store, PO, banks etc for collection at a later date (i.e. to reduce need for return travel).

11 Conclusion

11.1 Conclusion

To recap from the introduction, there were four main goals to this report. These were:

- To set the context for the RTS – including socio-economic issues, existing transport trends, and existing policy, and outline the main drivers and constraints that must be considered in the development of the RTS;
- To examine specific problems to be tackled, including outcomes from the consultation process, review of relevant trends;
- To develop a vision, objectives and set of principles for this RTS and provide justification for the provenance of these; and
- To provide details of the option generation and scenario building process, upon which the STAG appraisal will be based.

Each of these objectives are addressed in turn below.

11.1.1 **To set the context for the RTS – including socio-economic issues, existing transport trends, and existing policy, and outline the main drivers and constraints that must be considered in the development of the RTS.**

The main purpose of the review of background trends, transport trends and existing policy has been to contextualise the current and future environment and conditions within which the RTS will be set. Within each of these chapters, it has been the aim to explain what the identified trends mean for the RTS, with regards to whether these trends will act as constraints or drivers to the implementation of the RTS.

Through the socio-economic analysis it has been revealed that Shetland's spatial environment, particularly the topography, severe weather and spatial distribution of population could present constraints to the implementation of transport services on the island, whilst opportunities to control the pattern of land-use in Shetland, could assist in efforts to improve accessibility and reduce reliance on the private car.

The high expectation levels of Shetlanders and the desire to be innovative and lead the way are characteristics of Shetland's culture that must be harnessed in the development of the RTS. As stated by officers, a key challenge of the RTS will more likely be in the maintenance of the existing high levels of transport provision rather than improvements.

An ageing society and more centralised settlement patterns are further trends that require careful consideration from a transport perspective, as transport services can be delivered in a way to help decentralise or conversely, centralise population movements. This will have associated cost implications.

Future economic growth has also been considered with oil rig decommissioning, ICT, tourism and renewable energy, amongst other things, seen as key economic industries in Shetland's future that require consideration from a transport perspective.

In terms of deprivation, Shetland on the whole displays very high standards of living, although Northmavine and some of the more remote settlements tend to be most deprived in the context of Shetland.

In addition to the background, socio-economic trends, a wide variety of transport trends have also been presented. For external links, capacity constraints during the peak season have been identified as a problem. This is a significant concern with the increase in carryings on the Aberdeen to Lerwick ferry service. The introduction of lower air fares for islanders is viewed as

an initiative likely to generate additional demand at Sumburgh in the future. However, overall it is recognised that the RTP's ability to directly affect external link improvements is constrained.

For external and inter-island links in particular, it is also recognised that Shetland's reliance on lifeline links constrains choice, imposes timetable constraints, introduces vulnerability to transport connections and accessibility, and can deter investment. The limited market size in Shetland both for passengers and for freight is also seen as a key constraint facing the implementation of transport improvements. A key challenge of the RTP will be to provide high levels of accessibility whilst providing financially sustainable services.

For internal links, trends emphasise that Shetland has high levels of car ownership and traffic levels are continuing to increase on Shetland's roads. In the absence of traffic congestion, it is believed that there is currently limited incentive for modal shift away from the private car. However, future rises in fuel price, along with wider trends towards an ageing society and the introduction of national concessionary fares could signal an increasing demand for public transport services into the future.

Having established the main transport related and other background trends, the review of the existing local, regional and national policy has formed the final element of background context setting. The policy review has been used to shape the development of the RTS vision, objectives and options and ensure the proposals set out by the Shetland RTP are in keeping with wider policy objectives. A review of policy context has also been examined through consultation with key stakeholders, the findings of which are detailed in the Consultation Reports.

11.1.2 To examine specific problems to be tackled, including outcomes from the consultation process, review of relevant trends.

The review has enabled a specific list of transport related problems to be identified – specifically across the five national objectives of economy, safety, integration, accessibility and social inclusion, and environment.

11.1.3 To develop a vision, objectives and aims for this RTS and provide justification for the prominence of these.

Following on from the background review and in line with the Scottish Executive guidance, a vision has been developed for the RTP/RTS along with a set of objectives that outline how the vision will be achieved.

The objectives adopted for the RTS are replicated from National Transport Strategy Guidance, Scotland's Transport Future. However, a more specific list of objectives under each of the broader objectives have been developed to outline how the national objectives can be '*Shetland-ised*' and delivered in the context of Shetland. In line with guidance, efforts have been taken to ensure these objectives are outcome led.

A key element of the objective development was the input from SIC officers and RTP board members at an objective-development workshop. This has ensured officer buy-in and responsibility for the objectives developed.

In addition to the development of the objectives, some guiding principles on how the RTP will work have also been established. These have been heavily informed through the principles outlined by the Shetland Community Plan, which considered to be an overarching policy document in Shetland, upon which it will be essential for the RTS to feed into.

11.1.4

To provide details of the option generation and scenario building process, upon which the STAG appraisal will be based.

As demonstrated in Chapter 10, five alternative scenarios have been developed for taking forward to the STAG appraisal. These scenarios are based around different funding possibilities and include:

1. LTS 2000 Rolled Forward (i.e. continuation of 2000 LTS approach, or 'Do-Minimum' e.g. implies a continuation of current ad hoc spending patterns)
2. Cut Backs (i.e. options designed to cut cost e.g. if there was no revenue or capital finances available)
3. Spend to Save (i.e. development of infrastructure and services in the short term in order to save finances in the longer term e.g. infers the availability of external capital, but no revenue. Could also include measures to generate income)
4. Comfort (i.e. an improvement of current levels of service and hence improved levels of rural accessibility based on continuing levels of revenue expenditure e.g. built on the premise of that the RTP would receive more revenue, but no extra capital)
5. Aspirational (i.e. a scenario including all of the potential strategies and options that the RTP would wish to implement if there were no financial constraints i.e. reliant on the RTP receiving more revenue and more external capital).

Within each of these scenarios, options have been developed. Options have been informed through consultee suggestions and through a best practice review of rural transport service delivery. The options (and scenarios) have also benefited from discussion and input received from officers at an option development workshop.

In the coming months, the options will be further developed, costed and appraised as part of the STAG appraisal. The results of this will be used to inform and prioritise the strategies proposed within the Shetland RTS implementation plan.

Appendix A – Shetland-Wide Fact Sheets

- 1. Shetland Transport – Background Facts**
- 2. External Links and the Shetland Islands**
- 3. Elderly People and Transport in Shetland**
- 4. Young People and Transport in Shetland**
- 5. Access to Health**
- 6. Economic Issues**

1. Shetland Transport – Background Facts

- A historic decline in the population of Shetland was reversed between 1971 and 1981, attributed to the then fledgling oil industry.
- In 2001, Shetland had a total population was 21,988. However the number of registered health care patients recorded in January 2005 was 22,083. The register also noted that one third of Shetland's population is based in Lerwick.
- The **high cost of transport** was given as one of the top answers when asked what made residents 'mad about Shetland', during a recent poll.
- The price of fares on scheduled flights from Sumburgh Airport to Aberdeen, Inverness, Edinburgh and Glasgow can vary considerably.
- When asked to suggest improvements for the quality of life in Shetland, a common theme amongst respondents was the **reduction in transport costs** both internally and to and from the mainland. This answer was again repeated when asked 'If you could change one thing...'
- A return trip between Unst and Aberdeen hospital can take up to 10 hours and can typically cost between £300 and £400.
- Less than half the population of Shetland feel that it is easy to get to where they want outside Shetland, when they want.
- External transport links serving Shetland are largely weather dependant. Poor visibility at Sumburgh Airport can sometimes delay flights arriving into Shetland, for example.
- Half of the population of Shetland believe that **population targets should be set** for the next five years. The majority felt that these targets should aim to increase the population.
- The 4.7% of visitors to Shetland from Sweden, Finland, Norway and Faroe are attributed to the summer sailings between Norway, Faroe and Denmark.
- The inter island 'roll on roll off' ferries celebrated 30 years of operation in 2003. The first ro-ro ferries were based upon the vessels operating at that time in Norway.
- **Car ownership on Shetland has more than doubled** in less than 30 years, from 5,076 in 1976 to 11,430 in 2003. It may be possible to attribute this to the introduction of the roll-on roll-off car ferries that replaced the traditional passenger inter-island ferry service.
- Of the nine main inhabited islands off the Shetland mainland, Foula, Fair Isle, Out Skerries and Papa Stour, have an inter island air service to Tingwall airstrip operated by Directflight Ltd on behalf of the Shetland Islands Council running 8 seater 'Islander' aircraft.
- New schemes to improve transport for Shetland include a £10 million runway lengthening project at Sumburgh. Future aspirations have included fixed links between the Mainland and Yell and Yell and Unst. A fixed bridge link between Bressay and the mainland is currently in the planning process.
- Shetland attracts a large proportion of visitors from Scotland, also around a fifth coming from overseas.
- Over half the population of Shetland believe that the island will experience economic growth over the next 30 years. **66% believe that this will be generated through tourism** and 45% cited the renewable energy industry as a driver for economic growth.
- One of the most common reasons for visiting Shetland is attributed to the natural environment. 49% of the population recognised this, stating that Shetland was distinctive due to the natural landscape.
- During 2000, Shetland accommodated some 65,652 visitors. **The total visitor expenditure in Shetland totalled just under £12 million.**
- The Shetland museum generated over 26,000 visits in 2004 with Jarlshof proving the most popular paid attraction, generating some 15,320 visitors.

- **Business visits accounted for 31% of all tourists** to Shetland in 2000. These visits were also associated with the highest expenditure per head, averaging £258.

2. External Links and the Shetland Islands

- External links to and from the Shetland Islands are provided by ferry and air.

Airports and Air Services

- Scheduled air services are provided through Sumburgh Airport, which is operated by Highlands and Islands Airports Ltd.
- Flights to Sumburgh operate to and from Aberdeen, Edinburgh, Glasgow, Inverness, Orkney, and Fair Isle. Flights are integrated with connections from Glasgow, London Heathrow, Birmingham, and Manchester.
- There are five daily services to Aberdeen, two daily flights to Edinburgh, 1 daily flight to Glasgow, 2 daily flights to Inverness (via Orkney).
- This pattern is generally reversed for flights to the Shetland Islands.
- A twice weekly service is operating in 2006 for the first time, connecting Faroe to Shetland and London Stansted.
- In previous years, a summer air service to Norway has been operated.
- Total passenger numbers at Sumburgh Airport have fluctuated over the years. In 1991, the airport had 474,000 passengers but in 2001 this had reduced to 168,000 passengers. This is accounted for by the decline in oil industry related helicopter passengers to the airport, which declined from 214,000 in 1991 to 18,000 in 2001. Fixed Wing Scheduled passengers have actually increased from 77,000 in 1991 to 106,000 in 2001.
- There is a general feeling on the islands that more people would fly if it was cheaper because it is much quicker than the external ferry.
- The operation of flights from Sumburgh Airport can be limited by runway-length in certain weather and payload conditions. SIC, in conjunction with Highlands and Islands Airports Ltd, Shetland Enterprise and the Scottish Executive, are currently trying to improve operational reliability and have recently extended the runway at an estimated cost of £10 million. This work was completed in 2006.
- There is an airport at Scatsta operated for the oil industry, and this has seen an increase in passengers from 15,000 in 1991 to 247,000 in 2001.
- NHS have identified the need to safeguard and strengthen external links with Shetland, specifically because patients who require urgent specialist care rely on fast and efficient links to and from the Islands.

Ports and Shipping Services

- NorthLink Ferries. A subsidiary of Caledonian MacBrayne, provide passenger ferries to the Northern Isles on behalf of the Scottish Executive.
- The MV "Hrossey" and MV "Hjatland" operate the Aberdeen – Lerwick route, providing passenger and ro-ro facilities for this 12/14 hour sail. These vessels have the capacity to accommodate up to 600 passengers and approximately 200 cars. However, a common complaint about the ferries is that there are not enough passenger cabins available. On alternate nights, the Aberdeen / Lerwick and vice versa sailings call at Kirkwall in Orkney.
- Aberdeen to Lerwick passenger numbers have increased greatly since NorthLink took over the running of the ferry service to Aberdeen in 2002 from P&O Scottish Ferries.
- Total number of passengers carried on the Aberdeen to Lerwick service has increased from approximately 66,000 in 2002 to nearly 98,000 in 2004.
- The most popular months for travelling are in the summer (June, July and August). This could indicate the importance of this service as a tourist link to the Northern Isles.
- Livestock is also transported by ferry from Shetland to Aberdeen. In 2000, approximately 60,000 sheep were transported between Aberdeen and the Shetlands, and in 2004 this figure had increased to over 125,000.

- Ferry fares between Aberdeen and Lerwick vary by the season and generally range from £20 to £30 for adults (single passage) and £10 to £15 for children (aged 5-15). Infants travel for free. Cars cost between £80 and £110 (single passage). Premium berths cost between £70 and £102 (single passage), although cheaper berths are also available.
- Currently, between May and September, Smyril Line operates MV "Norrøna" on routes between Lerwick and Hantstholm (Denmark), Bergen (Norway), Torshavn (Faroe Isles) and Seydisfjörður (Iceland). The period of operation of this service may be reduced in 2007.
- The option has been raised of extending the Northern Isles ferry service beyond Aberdeen to also include a regular call at the new ferry terminal in Rosyth.
- The main advantages identified for an Aberdeen-Rosyth-Aberdeen leg as part of the Northern Isles ferry service include:
 - products would be much closer to market since the central belt and points south are the main destinations for fresh fish;
 - most of freight to the Northern Isles emanates from the central belt, the rest of the UK, and Europe, and hence benefits would arise through reduced road transport;
 - a direct service from Rosyth could increase the number of tourists visiting the Northern Isles.
- On the other hand, discussions with some freight operators in Shetland have revealed that the island has strong traditional links with Aberdeen and they would not like to see this changed.
- When asked whether they would prefer a ferry service to Edinburgh instead of Aberdeen young people in Shetland generally responded that they were happy with Aberdeen as the main destination.

3. Elderly People and Transport in Shetland

- According to the 2001 census, 16% of the Shetland population were of pensionable age and over, which is slightly lower than the national average (19%). However, current trends suggest that Shetland has an ageing population. For example, in 1991, the total population in Shetland aged over 60 was 3991, in 2001 it was 4138 and in 2003 this total had increased yet further to 4391.
- There are senior citizens clubs in Bressay, Burra, Clickimmin, Cunningsburgh, Foula, Islesburgh, Scalloway, Vidlin, South Mainland, Unst, Viewforth, Whalsay, Whiteness and Weisdale and Yell.
- The need for more sheltered housing in Gulberwick, Quarff, Cunningsburgh and Scalloway has been identified by local members of these communities.
- Sheltered housing is currently provided in Aith, Bigton, Bixter, Brae, Bressay, Burra, Cunningsburgh, Dunrossness, Fetlar, Gott, Gruiting, Hillswick, Lerwick, Mossbank, Firth, North Roe, Ollaberry, Sandness, Sandwick, Scalloway, Skeld, Skerries, South Nesting, Tresta, Unst, Urrafirth, Vidlin, Virkie, Voe, Walls, Weisdale, Whalsay, Whiteness and Yell providing accommodation for a total of 278 people. This total may become insufficient as the population becomes more elderly as is generally expected across Scotland.
- A lack of transport services in outlying areas can be a problem to older people in gaining access to the local shops and chemists.
- It has been suggested that some old people find it easier to travel to surgeries in Lerwick, for example, even though this may not be the surgery within their catchment. This is because it is often easier to use public transport to get to central service areas, such as Lerwick, than it is to get to local services.
- There are some islands and towns where it has been stated that there is a lack of healthcare which impacts on the elderly disproportionately.
- In addition, the elderly are more likely to require to travel to Lerwick or Aberdeen for healthcare and as such the transport issues surrounding this are more significant to them.
- Pensioners travel free on inter-island ferries.
- Footpaths can become slippery and dangerous in the winter, although it is believed that SIC do a good job in gritting roads and footpaths.
- It is believed that there is a need to review timetables so that elderly services and events are better integrated with bus services. This particularly affects older people as they are more dependent on public transport and physically less able to wait for long periods of time for onward transport.
- It has been mentioned that a scheme to encourage local supermarkets / shops to provide home delivery services would benefit older people.
- The introduction of a reduced rate taxi card scheme would be a benefit to older people.
- Some demand responsive travel is available such as dial-a-ride shopper services, but it has been mentioned that old people would like to see this scheme extended.
- Some pensioners have suggested that they live too far away from bus stops and therefore do not use bus services.
- The provision of bus shelters was highlighted as being an issue; pensioners are more likely to need to sit while waiting for a bus and have shelter from the wind and rain.
- Bus services are only available on Mainland, Yell, Unst, Fetlar, and Bressay. Therefore, there will be issues surrounding the movement of older people on some of the outlying islands.
- Drivers over 60 are the least likely age group to be convicted for speeding or seat belt offences in Shetland.

- Elderly are one of the categories of people that are less likely to have access to a car and are more dependent on public transport.
- The provision of timetable information has been highlighted as an area of difficulty for old people, particularly for bus services and ferry services. It can be difficult for older people to access this information.
- The provision of public transport is important to promote social inclusion, particularly as older people are less likely to have access to a private car.
- The provision of Kassel kerbs will make it easier for pensioners to board and alight from buses.
- Within Shetland, there are already bus services operating that make use of low floor buses, but where these do not operate, they could be implemented. It was noted that Shetland was one of the first places to introduce low floored buses.

4. Young People and Transport in the Shetland Islands

- The total proportion of youths in Shetland is slightly higher than the national average, according to the 2001 census. For example, the proportion of residents aged between 0 and 19 in the Shetland Islands was 26% compared to the Scotland average of 24%. However, on many of the islands of Shetland, this proportion is below these levels (i.e. Fetlar=20%, Yell=21% and Skerries=21%), which reflects the fact that the islands find it more difficult to retain younger members of their community.
- There is no real pattern in the school rolls at secondary schools throughout the Shetland Islands, as some schools have seen their rolls increase since 2001, such as Anderson High School in Lerwick, whilst others have seen a decline. However, a significant proportion of primary schools have seen their roles decline over the same period, with the greatest declines at Island-based schools.
- The proportion of residents aged 16 to 24 on Shetland is 10%, which is slightly lower than the Scotland average of 11%. This trend is even lower on islands such as the Skerries (4%), Unst (5%), Yell (7%) and Fetlar (7%). Since these are typically the ages that people enter into higher education and begin their careers, it can be inferred that there is a lack of higher education and new employment opportunities, particularly on the islands.
- Many youths from the islands often have to move to the mainland to pursue higher education, and some move to the UK mainland for university purposes. It has been stated that it is often the case that once students have achieved their qualifications, the lack of relevant employment, particularly on the islands, means that it is unlikely that they will return.
- At the various youth events that have been held, such as the Shetland Youth Conferences, transport is constantly identified as a key issue affecting the lives of young people in Shetland.
- The 2004 Youth Conference highlighted the belief amongst youth groups that transport is a big problem in Shetland and transport services need to be made more regular, reliable and cheaper. The need to improve road transport links was also noted.
- The Youth Voice Conference in 2005 raised some key transport related issues that youths would like to see delivered, including the provision of more night buses, and inter-island ferry times to coincide with the cinema.
- Limited access to transport in Shetland can make attending sports and recreation events difficult. More Sunday buses and the introduction of community buses to fit in with service times were suggested as measures that would improve transport to youth events.
- The cost of transport in Shetland adds to the cost of activity.
- For young people who live outwith Lerwick, transport, and specifically ferry times and costs, has been noted as the main reason for their non-participation in organised activities.
- For youths in Lerwick, more buses more often, particularly at night, was identified as one measure that youths would like to change about Lerwick. A bridge to Bressay was also raised as a specific measure that youths would like to see developed from the area.
- One bus in and one bus out per day is not enough for some areas according to young people.
- At the Shetland Youth Conference in June 2004, the desire amongst young people for a cinema and music venue in Shetland was stressed. Such facilities would require improved transport links.
- If bands are coming up from south to the new music venue, youths would like to see buses provided at times to suit the events.
- It is felt that a mobile cinema can relieve the pressure of people travelling from the isles.
- Young people have highlighted transport links to health services as an issue that should be addressed.

- In the 2000 Shetland Transport Needs Survey, it was established that, in terms of mode of travel to school, 48% of school children take the bus, 36% of children walk, and 15% are given lifts by car. Further modes included other bus (4%), cycle (2%), taxi (2%) and other (1%).
- It was also suggested that greater utilisation is made of the external ferries through the day, Monday to Saturday.
- Youth populations are aware of the costs spent on sustaining the inter-island ferries in Shetland every year, and many are enthusiastic about the potential of fixed links.
- It is stated that food is expensive on the external NorthLink ferries and should be made cheaper.
- Youths would also like to see the costs of flights and cabins on board the NorthLink ferries reduced.
- Using the nationally established Young Scot card and its existing services (i.e. discounts at shops etc) as a base card, SIC have developed a card with a smartened chip, which allows young Shetlanders additional benefits such as access to leisure and library service. Young people have suggested that they should be allowed to use their Young Scot card when booking flights to obtain discount.
- The 2005 Youth Voice Conference also asked the question whether young people would prefer a ferry service to Edinburgh instead of Aberdeen. In general, it was established that Aberdeen was thought to be better.
- There is a lack of awareness amongst younger populations about SIC's Transport Strategy, and many would like to know more about it.

5. Access to Health

- Total primary care practice registrations totalled 22,083 in January 2005. A third of this population is located in Lerwick, with the remaining population located across 567 square miles and the 15 inhabited islands that make up the island group.
- The health board expenditure per head of population in Shetland remained below the Scottish average until the mid 1990's. It increased from £312 in 1986/87 to £1,456 in 2002/03. This represented a change of approximately 367%. During this same period, the growth in the average Scottish expenditure was approximately 293% from £392 to £1,148. Factors attributed to this could include the twofold increase from 10,630 to 23,952 of total out patients and doubling of the technical, scientific, professional and administrative staff during this same period.
- Hospital services are centralised in Lerwick through two hospitals. The Gilbert Bain hospital is a 68 bed unit that provides general medical services including accident and emergency admissions, maternity facilities, rehabilitation services and day surgery. The Montfield Hospital is a 40 bed hospital and principally provides medium to long term care for the elderly. Support is available via visiting consultants from mainland Scotland although patients can be required to travel to Aberdeen, some 200 miles distant, for some treatments.
- Travel to the health care facilities in Aberdeen is both expensive and time consuming. As an example, a return trip between Unst and Aberdeen hospital can take up to 10 hours and can typically cost between £300 and £400.
- General practices deliver the local primary health care services through a network of 10 primary health care centres, 9 of which are rural practices (1-3 doctors) and a tenth is in Lerwick (7 doctors).
- Fair Isle, Foula, Papa Stour and Out Skerries are significant in that they are all non-doctor islands with a single handed community nurse providing immediate health care cover supported from the nearest GP practice. Papa Stour however accesses all services through a mainland based practice. Transport to these islands is provided by inter island aircraft services averaging flights of 2-3 times a week and inter-island ferries. The Fair Isle ferry runs once a week in winter but 3 times in summer, the Foula ferry operates twice a week in winter and 3 times in summer, the Papa Stour ferry runs 7 times a week all year, and the Skerries ferry operates 12 times a week all year.
- Shetland residents live further away from health care facilities in comparison to Scotland as a whole. For example, 15% of Shetland residents live more than a 60 minute drive away from an acute hospital, compared to 0.6% in Scotland. Furthermore, 4.4% are over 30 minutes drive time distant from a GP as opposed to 0.2% in Scotland.
- For some remote communities, travel to the nearest health care facilities will involve a journey by road and is likely to include crossing a stretch of water either by air or ferry; both of which can be weather dependant. In extreme circumstances, when services have been cancelled for days, the coastguard helicopter will respond to emergencies.
- During the period 2003-2004 the total patient transport costs borne by NHS Shetland totalled £1.5 million with 80% of this cost attributed to air travel.
- Shetland patients receive support in arranging transport for their next appointment via NHS Shetland Patient Travel Office. Patients are provided with information about the service when an appointment outwith Shetland is necessary. The service arranges travel tickets and can advise on accommodation. Escorts are funded when deemed medically advisable while families and carers are offered reduced visitors fares.
- Frail, ill or emotionally distressed patients travelling between the islands and Grampian are provided with a Discharge Liaison Nurse (DLN). The DLN implements a system of protocols when travel is delayed and makes timings of clinic appointments to fit around travel plans. The nurses are involved when the journey is complex, involves inter-island journeys or is weather dependant whereby unscheduled overnight stays may be an issue.

- Smaller islands have no ambulance service. Yell, Unst and Whalsay have resident ambulances that are covered by a driver on a retainer scheme only, with no paramedic assistance. Patients are then transferred to paramedic manned ambulances on the mainland; an overall process which can take up to one hour.
- Procurement is currently underway that aims to provide faster purpose built and medically equipped and staffed aircraft. The aircraft will be based in Aberdeen and the service will be supplemented with a contract with BP helicopters for back-up services. There are however local concerns relating to the effects that this will have on the council run Islander service.
- Long term NHS aspirations include flexible, regular and bookable transport in the form of community cars or buses linking sea, air and land travel at a reasonable cost.
- Improved access to services and amenities for the elderly and those with long term disabilities are considered important to the NHS 2020 vision of healthcare transport. Schemes such as reduced rate taxi cards or encouraging local shops to provide deliveries were identified as being instrumental in future improvements.
- Included within the NHS vision for the future are cheaper, quicker and non-weather dependant external links. An option considered would be to break the current monopoly held by current operators by inviting other European service providers to provide the external services. Public Service Orders are currently being discussed with political leaders that would enable reduced cost air travel to and from remote areas, including Shetland. It is hoped that this would therefore help the recruitment and retention of health staff in particular.
- Fixed links would be viewed as an asset in providing road ambulance services across Shetland, removing the uncertainties associated with ferry services particularly during adverse weather conditions. Connections between Unst and Yell, and Yell and the mainland would be key priorities and the bridge link between Bressay and the mainland, currently in planning, is welcomed.

6. Economic Issues

- During the past 30 years, Shetland has benefited from one of the lowest unemployment rates in the country. In June 2005, 1.8% of Shetland's economically active population was unemployed, compared to the Scottish average of 2.8%.
- Setting a ceiling target of 3.5% for unemployment during the period ending 2012 and eager to promote a sustainable population of 23,000, the 2002 Economic Development Strategy forecasts that it will be the manufacturing sector that will generate over 500 job opportunities and will form the bulk of the new job opportunities required in Shetland.
- Within the service sector a loss of up to 60 jobs is expected over a ten year period within transport related employment. This however excludes air transport which is expected to remain stable and sea transport where an increase of 40 jobs has been forecast by the Shetland Local Economic Forum.
- The three top key sectors of the Shetland economy in terms of value are Fishing (including catching and processing), the Shetland Island Council and Oil production operations. Each was valued in 2002 at £208.2 million, £133.4 million and £65 million respectively. Agriculture had a value of £13.1 million, Tourism £12.6 million and knitwear £3.0 million.
- Fishing comprises three component sectors namely pelagic, shellfish and whitefish. The whitefish sector has suffered a 25% reduction in the previous 10 years and landing restrictions imposed in February 2003 have further damaged the industry. However inshore shell fishing remains successful and the combined sector turnover reached £53 million in 2001 and generated employment for some 400 personnel.
- Fish processing generated a £102 million turnover in 2001 with the majority of the 500 strong workforce employed in the processing of salmon. Key issues relating to this industry sector are the dependability and escalating costs of freight links. Comments from local operators indicate that the opportunities to sell their product retail rather than wholesale, and therefore achieve a better price, are limited due to the reliability of the existing transport links.
- The discovery of the oil fields to the north east of Shetland during the early 1970's prompted the Zetland County Council to negotiate a Private Bill through Parliament that aimed to safeguard local interests that could be threatened by oil activities. The resulting Charitable Trust receives payments for disturbance and harbour activities and has been used to finance many of Shetland's community projects.
- Oil production activities focus around the 400 hectare Sullom Voe crude oil and gas terminal, 46km north of Lerwick. Fully completed in 1982, this is one of the largest refineries in Europe producing on average 650,000 barrels of crude oil per day. The Sullom Voe terminal has a permanent workforce of 640, and 86% of those are Shetlanders (2003 figures). However, in an effort to improve terminal efficiencies, there is an expectation that the Sullom Voe workforce and related services will be downsized by 250 over a ten year period. Making the Port of Sullom Voe and the terminal as competitive as possible in order to generate more business is a key issue identified in the economic development strategy document.
- Freight link costs and dependability are key factors that affect agriculture. The industry comprises some 1200 part time and 100 full time units and supports approximately 600 people. However efforts to reverse the depressed nature of the agricultural markets by value added production have mostly failed. Lamb and cattle are exported without a Shetland specific identity as the high costs of a remotely run slaughter operation make it cost prohibitive.
- Visitor expenditure in Shetland totalled £11.9 million during 2000. Business trips accounted for 45% of the visitor total, while 34% were holiday visitors and 18% of visitors were in Shetland to visit relatives. Air travel was the most popular method of transport to the islands and travelling by sea accounted for the remaining 35% of journeys made. Wildlife and the environment are key reasons for visiting Shetland. However, the standard of facilities and services available are seen as weaknesses and the high cost of travel to and from Shetland are recognised as significant issues.

- Improving external links is a key priority identified in the 2012 Economic Development Strategy. Methods to achieve this include pursuing air and sea services that are suitable to meet Shetland's social and business requirements. The maintenance and development of Sumburgh's facilities and the improved marketing of these services have been recognised as ways to facilitate this.
- Diversification away from the current narrow band of industrial sectors is also prioritised as a way to enhance and maintain the prosperity of Shetland. Measures to achieve this lie in the development of new technology that would allow distance working. However, remote working is limited to the available network connections with some islands unable to support broadband connectivity. Additionally, the Economic Development Strategy recognises the importance of maximising Shetlands potential as a North Atlantic crossroads.
- The importance of fostering economic activity in the rural areas of Shetland is identified as having a key role in the strengthening of rural communities. Supporting the growth of rural businesses by maintaining local transport provision and promoting social inclusion measures including access to training child care and flexible working practices are key enablers to this. The decentralisation of administrative services could help to sustain some of the remote populations.

Appendix B – Local Fact Sheets

1. Bressay Fact Sheet
2. Burra and Trondra Fact Sheet
3. Delting Fact Sheet
4. Dunrossness Fact Sheet
5. Fair Isle Fact Sheet
6. Fetlar Fact Sheet
7. Foula Fact Sheet
8. Gulberwick, Quarff and Cunningsburgh Fact Sheet
9. Lerwick Fact Sheet
10. Nesting and Lunnasting Fact Sheet
11. Northmavine Fact Sheet
12. Out Skerries Fact Sheet
13. Papa Stour Fact Sheet
14. Sandsting and Aithsting Fact Sheet
15. Sandwich Fact Sheet
16. Scalloway Fact Sheet
17. Tingwall, Whiteness and Weisdale Fact Sheet
18. Unst Fact Sheet
19. Walls and Sandness Fact Sheet
20. Whalsay Fact Sheet
21. Yell Fact Sheet

1. Bressay Fact Sheet

- Bressay is 7 miles long by 3 miles wide and sits off the east coast of Shetland Mainland, a seven minute ferry sailing from Lerwick over the Bressay Sound.
- There has been a recent commitment by the Council to connect Bressay to Shetland Mainland with a bridge. This is currently in the planning process.

Transport

- There are 22 inter-island ferry services each way from Monday to Thursday and 24 on Friday and Saturday. The first ferry leaves Bressay at 0700, with the first ferry leaving Lerwick at 0715. The last ferry leaves Bressay at 2230 except on Friday and Saturday when the last ferry leaves at 0045. The last ferry leaves Lerwick at 2300 except on Friday and Saturday when the last ferry leaves at 0100.
- On Sundays, the first ferry leaves Bressay at 0700 and the first ferry leaves Lerwick at 0715. The last ferry leaves Bressay at 2230 and the last ferry leaves Lerwick at 2300. In total, there are 18 return ferry services throughout the day.
- Ferry fares are £3 for an adult return (40p for children); £14 for an adult 10 return journey ticket (£2.40 for children); and £7 for cars up to 5.5m (and driver).
- In addition to the above services operated by SIC, Scottish Natural Heritage operate a small inflatable boat to provide a ferry service from May to August except Mondays and Thursday. This connects Bressay to the island Noss. If the weather is bad the boat doesn't operate.
- Following implementation of the fixed link to Bressay, it is considered that there will be a requirement for road improvements on the island itself.
- With regards to public transport in Bressay, it is intended that the development of a fixed link will include the introduction of a much more frequent bus service to Lerwick.
- At present there is a post-car, operated by the Royal Mail, which leaves the post office at 0900, then the ferry terminal at 0915 to return to the post office. It leaves the post office again at 0935, then departs Noss Sound at 0935 to return to the post office. It leaves the post office at 1122 and then leaves the lighthouse at 1215 to return to the post office. However, these are approximate times depending on mail deliveries and seats are strictly limited.
- There are also Bressay shopper services, which depart Mondays and Tuesdays fortnightly, and every Saturday.
- Car ownership levels on Bressay have remained stable between 1991 and 2001, with only a slight increase apparent. For example, in 1991, the number of households on Bressay with no cars or van was 20% and in 2001 this had slightly decreased to 19.9%. Similarly, little difference has been observed in the number of households with 2 or more cars or vans as this figure stood at 32.9% in 2001, marking an increase of just 0.8% from the 1991 levels.
- In 2003, a questionnaire, entitled "Being a Young Person in Lerwick and Bressay", was completed by many of the youngsters on Bressay. Transport was noted as the main reason for their non-participation in organised activities, with ferry times and costs specifically highlighted.
- The questionnaire also found that many young people said that they would like to see a bridge to Shetland Mainland built.

Population

- Bressay has experienced population growth of 20% during the twenty years between the 1981 and 2001 census. In 1981 there were 334 residents, in 1991 there were 352 residents and in 2001 there were 384 residents.
- In terms of age structure, Bressay broadly follows trends apparent for Shetland in general. However, one notable difference is that a lower proportion of Bressay's population are aged between 20 and 29, which suggests a lack of new employment or career opportunities on the island.
- Another significant trend is that Bressay has a higher than average proportion of residents aged between 65 and 84, suggesting that the population is ageing. For example the proportion of Bressay residents aged between 65 and 84 is 16% compared to the Shetland average which totals 12%.

- On Bressay, there is one primary school, which also accommodates nursery pupils. The number of pupils at Bressay Primary School has fluctuated over the years. The number of children attending the nursery has remained steady.
- Although there is no doctor on the island, the regular ferry services enables good access to health services in Lerwick.

Economy

- The Bressay fish-meal factory, located at Heogan, is the main private employer on Bressay.
- Agriculture and crafting play an important part in helping to sustain the local population on Bressay.
- However, on the whole, employment opportunities on Bressay are limited, with many residents commuting daily to Lerwick for work.
- A number of ferry jobs will be lost with the development of a fixed link from Bressay to Shetland Mainland. However, it is hoped that the fixed link will trigger the development of business and industrial activity on the island which will offset some of these job losses.
- Tourism plays a part in the local economy with the island of Noss, the principal tourist attraction in the Bressay Community Council area. Noss is an uninhabited island which lies to the east of Bressay. Scottish Natural Heritage offers a summer passenger ferry service, which serves as a key tourist attraction due its array of wildlife. There are plans to develop the lighthouse building on Bressay into a museum showcasing the history of lighthouses in Shetland.

2. Burra and Trondra Fact Sheet

- The three inhabited islands of East Burra, West Burra and Trondra lie south of Scalloway and are linked to each other and the west of Shetland Mainland by bridges.
- The two main settlements are Hamnavoe and Bridge-End, with the rest of the population located in smaller isolated groups. Hamnavoe is a compact settlement comprising approximately 150 dwellings.

Transport

- The bridges linking Trondra and East and West Burra to each other and the mainland have been the most important transport developments in the area, and act as lifeline links to Shetland Mainland.
- Public transport operates Monday to Saturday between Hamnavoe and Lerwick, as part of the Scalloway to Lerwick service. The first bus leaves Hamnavoe at 0810 and arrives in Lerwick at 0840. Other departures from Hamnavoe are at 1020, 1315, 1520, 1740 and 2305 (Saturdays only). The only services that return to Hamnavoe leave Lerwick at 1300 and 1705 (arriving in Hamnavoe at 1335 and 1740 respectively).
- A single fare from Hamnavoe to Lerwick is £1.55.
- According to the Community Statement, the community feels that there is an inadequate service south of Hamnavoe.

Population

- There has been rapid growth in Hamnavoe over the past 30 years or so, but given this, there are few facilities with only one shop and PO, a church, a primary school and a community hall.
- Bridge End is located around 1.5 miles south of Hamnavoe and comprises a scattered settlement made up of some 70 dwellings which have formed following the coalescence of three distinct hamlets (Bridge-End, Grunasound and Toogs) over the past 30 years.
- The population in Burra and Trondra has grown in over the past decade, principally due to its popularity with commuters who either work in Scalloway and Lerwick. For instance, in 1991 the population was 1,029 but in 2001 the population had risen to 1,140. Furthermore, the population of Burra and Trondra is forecast at 1,183 in 2011.
- Hamnavoe Primary School has a declining school role. For example, the school role was 96 in 1991, in 2001 this stood at 63, and in 2003 this had declined yet further to 59.

Economy

- Many residents in the area are employed in the crofting, agriculture, fishing, fish processing and fish-farming industries, whilst many others commute to work in Lerwick or Scalloway.
- Aquaculture is increasing in importance in the area, with several salmon farms sited in many of the sheltered voes and bays.
- According to the community statement, detailed in the Shetland Local Plan, the local community have identified the harbour and breakwater in Hamnavoe as needing refurbishment and further development.
- There is an industrial estate on Burra located over the bridge from Trondra, which contains a fish processing factory and several other local businesses. In the Bridge-End area, there are an aluminium fabrication business and a toy maker. There is also a home-based knitwear producer on Trondra.
- According to 2000 figures, there were 104 jobs within the Burra and Trondra area, with 2 people unemployed.
- It has been suggested that the exposed nature of Burra's west coast to the Atlantic swells make the area ideal for a wave energy project.
- It is stated that there are a number of tourist attractions in the area, such as Meal Beach, and the working croft in Trondra which shows visitors traditional methods of farming. There are also excellent coastal walking opportunities. The Bridge-End Outside Centre serves as a base for courses run by several organisations in kayaking, walking and nature studies. A number of B&Bs are available in the area, although it is stated that further tourist facilities would be welcomed.

3. Delting Fact Sheet

- Delting is located in the north of Shetland Mainland. The main settlements in the area are Mossbank, Voe and Brae, which is the third largest town in Shetland.
- Brae is the main service and shopping area for the North Mainland. It is located 25 miles north of Lerwick and 6 miles south of Sullom Voe.

Transport

- Delting has good transport links with good road links to the rest of Shetland Mainland, and a ferry terminal at Toft which welcomes ferries from Yell, and via Gutcher, Unst and Fetlar.
- The Toft ferry terminal has been redeveloped in recent years to accommodate the new ferries, the Daggri and Dagalien servicing Yell. There are aspirations in the longer term for a fixed link bridge or tunnel from Mainland to Yell, which would have significant impacts on the Toft terminal, and the wider Delting area.
- Many residents from outside of the Delting area commute to the Sullom Voe oil terminal, particularly from Northmavine, Lerwick and Yell. The terminal is thus important not just for Delting, but the whole of Shetland.
- In terms of public transport, there are a number of services that travel through the Delting area.
- From Monday to Friday, buses on the Toft-Mossbank-Lerwick route service the area. The first bus departs Mossbank at 0650 and arrives in Brae at 0710, Voe at 0720 and Lerwick at 0750. The last bus departs Mossbank at 1805 and arrives in Lerwick at 1850.
- The first bus from Lerwick departs at 0755 and arrives in Brae at 0838 and Mossbank at 0915. The last bus departs Lerwick at 1710 and arrives in Mossbank at 1805. However, on Tuesdays and Thursdays only, there is an even later bus that departs Lerwick at 2145 and arrives in Brae at 2230 and Mossbank at 2240.
- There are typically five services on Saturdays, and just two services on Sundays, although the Sunday service only operates during the school term.
- Bus fares cost £2.20 from Mossbank to Lerwick, and £1.80 from Brae to Lerwick.
- Pensioners in Voe are taken once a week by community bus to Brae Post Office because there is no Post Office in Voe.
- Other public transport services include:
 - The Brae/Scatsta/Voe Shopper service every fourth Friday.
 - The Sullom Area to Brae and Return service every Monday to Saturday departing Sullom at 0755 and Brae at 1750.
 - The Brae to Hillswick service every Thursday departing Brae at 2230.
- The airport at Scatsta predominantly serves the oil industry. The airport has seen an increase in passengers from 15,000 in 1991 to 247,000 in 2001.
- In the Delting Community Statement, it was stated that roads in the area were generally of high standard, although various road improvements, including road widening and improving passing places, at different locations throughout the area were suggested. The Community Council also requested a lowering of the speed limits from Muckle Roe into Brae from 40mph to 30mph.
- The new Muckle Roe bridge was built in 1999 and substantially improved the link between the island and Shetland Mainland.

Population

- Between 1991 and 2001, the population of Delting decreased from 1935 to 1826. Further declines are predicted in the future with a projection of 1605 forecast for 2011.
- School roles at the various schools throughout Delting have fluctuated. Whilst Mossbank and Olafirth primary schools have maintained relatively stable roles, Brae primary has seen a significant drop in pupils attending. Brae Secondary School has seen its roll increase between 1991 and 2001 although there is some evidence that this appears now to be declining.
- The school at Brae is used as a 'community school' which entails that in addition to education, social work, family support, and health services are available from the school.

Economy

- Delting is home to Shetland's principal industrial site, Sullom Voe oil terminal.
- The Sullom Voe oil terminal became operational in 1978. Unsurprisingly, the oil and gas industries are the main employment industries in Delting, employing around 800 people.
- Sullom Voe is one of the most important ports in the UK and handled 16.7% of the UK's oil traffic in 1998 and 10% of all bulk UK fuel.
- Given that there is a great deal of dependency on the oil terminal, it is recognised that there is a need to diversify the local economy of Delting.
- Aquaculture is a very important local industry with numerous salmon and shellfish farms in the area's sheltered voes.
- Agricultural potential in Delting is limited by the rough and hilly terrain.
- In the Delting Community Council statement, detailed in the Local Plan, it is stated that Voe Pier is an important facility for the local aquaculture industry but is in need of replacement. It is believed that improvements to the pier will benefit the local community by increasing its capacity for involvement in the tourism, aquaculture and inshore fisheries industries.
- The area holds an annual sailing regatta.
- The exposed topography of the area lends itself to the provision of alternative energy resources.
- The possibility of using the Orka Voe site for quarrying has been raised. It is thought that the existing deep-water jetties at the oil terminal could be used to transport the aggregate, although it is believed that as long as the oil terminal continues to operate, this is perhaps not a realistic option.
- Tourism is limited in the area but it is felt that more could be done to capture the benefits of tourism given that tourists have to travel to Toft if they are visiting the North Isles, or via Mavis Grind to reach Northmavine.
- The oil terminal is a visitor attraction although there is a lack of visitor facilities. The possibility of developing an Oil Interpretation Centre in the area has also subsequently been suggested to capture the benefits of tourism.
- Firth and Mossbank Enterprise (FAME) is one example of best practice in the delivery of rural services. FAME serves the Firth and Mossbank Community, which is located close to the Sullom Voe Oil Terminal and is home to 500 people, including 180 children. The area is isolated with few local services, limited transport, and few employment opportunities other than those at the oil terminal.
- FAME was set up in 1997 and consulted with local people on the issues that they should address, with health and well-being, economic regeneration, and youth facilities emerging as key issues that required attention. Having identified the key areas of need, FAME converted three empty houses to form the Firth and Mossbank Community Centre which provides local childcare, peripatetic health and social services, facility education, and community group facilities. The centre also acts as a visiting GP surgery and provides an invaluable local medical practice for locals, who would otherwise have to travel to Brae, ten miles away, for the support and advice they receive at the Firth and Mossbank Centre. Besides improving the accessibility of locals, another advantage of the centre is that it has created 3 full-time and 6 part-time jobs. There are also around 30 volunteers involved at the centre and evidence shows that where locals are given responsibility in the running of community services they are more likely to take ownership of it to ensure that it is successful. FAME has also attracted funding for a community mini-bus to serve the community.

4. Dunrossness Fact Sheet

- Dunrossness is the most southerly Community Council area in Shetland and also includes Fair Isle.
- The population is scattered throughout the area, with the main settlements being Levenwick, Bigton, Boddam, Scousburgh, Quendale, and Virkie.

Transport

- There are a number of different bus services that operate through the area. There is a bus between Lerwick and Sumburgh Airport. The first bus leaves Lerwick at 0600 and the last bus leaves Lerwick at 2105 except for Friday when the last bus leaves at 2230. In the reverse direction, between Monday and Fridays the first bus leaves Scatness at 0655 and the last bus leaves Sumburgh Airport at 1945. Overall there are 8 services connecting Dunrossness and Sumburgh Monday to Friday, 5 on Saturday and 4 on Sunday, in each direction.
- Fares are £2.20 between Lerwick and Sumburgh Airport.
- There is also a South Mainland Dial-A-Ride Shopper Service every Friday.
- There are some road safety concerns regarding children's activities in Bruce Memorial and Boddam halls, alongside the main road.
- Sumburgh Airport is the main airport serving Shetland. It's operation currently can be limited in certain weather and payload conditions by the length of runways. SIC, in conjunction with Highlands and Islands Airports Ltd, Shetland Enterprise and the Scottish Executive, are addressing this by extending the runway at an estimated cost of £10 million.
- In addition to flights to the Mainland, there is also a Saturday flight from Sumburgh to Fair Isle in the summer.
- The Fair Isle ferry berths at Grutness. Ferries depart Grutness on Tuesday at 1130 and Fair Isle at 0730. In the summer, services depart Tuesdays and Saturdays between Grutness and Fair Isle, with an additional service every other Thursday. There is also a service every other Thursday between Fair Isle and Lerwick.
- In response to the relocation of Shell flights to Scatsta in 1999, and the subsequent impacts to the local community, a Dunrossness Community Profile and Ness 2000 Conference was undertaken. As part of this process, a profile questionnaire was completed by 220 residents, revealing the following transport related trends:
 - A high percentage of respondents indicated that they travelled more than 26 miles to work suggesting that Dunrossness is very much a commuter belt for Lerwick.
 - Own car is the most convenient method of getting to work for most people.
 - With regards to the bus service, many people commented that the schedule was not convenient for their working hours. The service is only convenient for employees working from 9am to 5pm.
 - Asked if anyone in the family used public transport, 129 respondents said yes and 93 said no. Asked if respondents were satisfied with the level of service provided by public transport, 107 said yes and 47 said no. Reasons that people were not satisfied included that buses were unsuitable for the route; there were not enough bus services; there was no feeder service round Dalsetter/Clumlie loop; and some people were not aware of extra services provided.
 - It was found that there is a high level of car ownership in the area.
 - 66 people believed the ferry service to the Fair Isle to be okay, 39 people thought it to be good, and 11 people thought it to be poor.
 - 80 people believed bus shelter provision to be good, 81 said it was okay, and 32 people thought it to be poor.
- A youth questionnaire was also distributed to pupils at Sandwick Junior High, with the main transport related findings as follows:
 - The most common travel mode amongst youths in Dunrossness is lifts by parents. This is followed by bus, walking, a lift, bike and taxi.
 - Asked if the bus service is okay, 25 said yes, 20 said no. Reasons people were not satisfied with the service included that there were not enough buses at night; there

were not enough feeder services to Bigton; that there were no feeder services to Dalsetter; that there were not enough bus stops; and the bus takes too long.

- Businesses in the area were also asked to complete questionnaires. The main findings were:
 - The cost of internal transport was viewed as a major threat or threat by 22 people, whilst 6 businesses did not see this as a concern.
 - 25 businesses stated that the cost of external transport and freight was a major threat or threat whilst 4 businesses said it was not a threat.
 - Asked what could be done to help businesses prosper in Dunrossness, reasons suggested included reducing transport costs, maintaining transport links, reducing freight costs between Aberdeen and Shetland, and the negotiation of more sensible pricing by HIAL.
- Other main findings established from the Community Profile questionnaire included that there is a need for flexible transport provision, such as a community minibus, for the disabled, elderly and isolated persons in Dunrossness. The questionnaire also highlighted a need for a feeder service or some transport provision round the Clumlie, Dalsetter loop where it was stated that there were approximately 50 houses with no provision.

Population

- Dunrossness has an ageing population. The population of Dunrossness has gradually declined over the years. In 1981, the population was 2,211, in 1991 the population was 1,976 and in 2001 the population had dropped yet further to 1,471.
- Dunrossness Primary School is one of the largest primary schools in Shetland. The school roll is gradually declining and in 2003 there were 130 pupils. The nursery roll at Dunrossness is 26. This is also a slight decline from previous years.
- The 2000 Community Profile asked local youths if they would like to stay in Dunrossness when they are adults and 18 said yes but 23 said no.
- It is believed that whilst there is a wide range of groups and activities for children and young teenagers in the area, older young people tend to travel to Sandwick or Lerwick for work and leisure activities.

Employment

- The area has the greatest expanse of fertile land in Shetland, and as such the primary and traditional industry of the area is crofting. Arable and grazing is supported in the area.
- In recent times however, national difficulties have dramatically reduced farm incomes and, subsequently, the Local Plan identifies the need for the area to diversify the economy and create new employment opportunities.
- The number of people commuting from the area to Lerwick is increasing.
- There is a strong reliance on public sector employment in the area.
- The expansion of Sumburgh Airport in the mid-1970s to serve the needs of the oil and gas industry created new employment opportunities and the need for additional housing.
- In 1999, Shell's oil related flights were rescheduled to Scatsta airport, which was a major blow to the local community. The airport is still an important employer in the area today.
- There is a desire for a focal point such as a visitor centre to help promote the local Dunrossness area and its tourist attractions.
- It is believed that there is potential for renewable energy on the mainland.
- Aspirations in 20 to 30 years time include more tourist accommodation, and cheaper travel to the mainland which would thus strengthen the position of Sumburgh Airport and encourage tourism.

5. Fair Isle Fact Sheet

- Fair Isle is often labelled the most isolated inhabited island in the UK and is located mid-way between Shetland and Orkney. The island's small population are mainly involved in crofting and crafting and are scattered predominately over the southern half of the island.
- Fair Isle is 24 miles south-south-west of Sumburgh, and is only 3 miles by 1 mile in extent. It is owned by the National Trust for Scotland.

Transport

- Fair Isle is one of the UK's most remote communities as it is over 2 and a half hours by ferry and 25 minutes by plane from Shetland.
- Fair Isle is served by a ferry from Grutness and Lerwick. There is only service during the winter - ferries depart Fair Isle on Tuesday at 0730 and Grutness at 1130.
- In the summer, there is also a fortnightly sailing from Lerwick.
- There is a pier and small boat harbour on the Fair Isle located at North Haven. The ferry 'Good Shepherd IV' carries 12 passengers to and from Grutness on the Mainland to North Haven on the Fair Isle.
- Air travel to Fair Isle is by an eight-seater Loganair 'Islander' plane which leaves from Tingwall airport and takes about 25 minutes to reach Fair Isle. The service operates on Mondays, Wednesdays, Fridays and Saturdays. There are four services per day, except on Saturdays when there are two flights only. In addition from 7th May to 15th October on Saturdays there are flights to Fair Isle from Sumburgh.
- It is believed that there is a need for improvement to the Grutness Pier to aid ferry berthing.
- Return air fares cost £56 for an adult, £42 for those aged 12 to 24, and £28 for those aged 2 to 11 and over 60.

Population

- The population on the Fair Isle has remained remarkably stable at around 65 over the last 40 years.
- The school role at Fair Isle Primary School has fluctuated over the past 30 years. However, in recent years there has been a significant drop in school role with 10 pupils in 2003 compared to 17 in 2001. There is also an integrated nursery at the school and in 2003, this had three nursery pupils.
- Secondary education for Fair Isle children is provided at Anderson High School on Shetland Mainland, with residential accommodation during the school week and weekends. Pupils return home approximately four weekly, which emphasises the importance of efficient links to the Fair Isle.
- Unlike many other islands where students move away for further education and do not return, this is not the case in Fair Isle, where a large number of the island's young people go onto further education before making the conscious decision to return and set up home on Fair Isle when the opportunity arises.
- Doctors from Levenwick Surgery visit the Fair Isle approximately every 3 weeks, and medication can be flown out or put on the boat. Although there is not a doctor based on the island, there is a fully qualified nurse, and if further medical care is required in an emergency, the air ambulance service can be called upon.
- Sheltered housing accommodation is provided on the Fair Isle.
- The continuation of core services on the Fair Isle is an ongoing concern of the community.
- In terms of aspirations, in 20-30 years time, cheaper travel to the Mainland would be welcomed in order to improve tourism opportunities to Fair Isle.

Economy

- Crofters (there are eighteen crofts ranging in size from 3 to 20 hectares) and craftspeople make up the vast majority of the population. Boat-building, building work, spinning, knitting, straw work, musical instrument making and repair, environmental consulting, meteorological work, crewing the inter-island ferry, and part-time teaching are just some of the jobs that exist on the island.

- The Fair Isle's economy is also supported in part by tourists who visit the island for its renowned ornithology. Tourist accommodation on the island is provided by self-catering cottages, B&Bs and accommodation at the Fair Isle Bird Observatory. It is also noted that the arrival of cruise liners in the summer is becoming increasingly important for enabling tourism on the island to prosper.
- In 2004, the Fair Isle became the UK's first Fair Trade Island.
- Another notable characteristic about the Fair Isle is that this island has led the way in developing renewable energy. Far from the National Grid, Fair Isle must make its own electricity and does so mainly by the power of the wind - which is usually in good supply! Fair Isle was the first area in Europe to provide its own commercially-operated wind energy scheme. The island generated its own electricity using a combination of diesel and wind power. In 1982, the first 60kw wind turbine was installed on the island and as a result of its success, the islands were able to build up a reserve fund to pay for a second 100kw to upgrade the old one in 1996.
- There are logistical difficulties in undertaking external contractual work on Fair Isle.
- There is an old fish-store at the south end of the island, which was converted by the NTS into hostel type accommodation for visiting work parties. Many groups of young people are involved in on-going work on the island and are known to work to help them around the crofts. These regular visits are much appreciated by the islanders, especially the younger ones, as they bring lasting friendships and insight to many other parts of the world.

6. Fetlar Fact Sheet

- The North Isles is a group of three islands to the north east of the mainland of Shetland: Yell, Unst and Fetlar. They are connected to each other through a triangular ferry service route on Bluemull Sound and are connected to Shetland Mainland by a ferry service across Yell Sound.
- Situated 2 miles to the east of Yell, Fetlar is approximately 6 miles long by 1 to 3 miles wide. Its green, fertile land has earned Fetlar the reputation as the 'Garden of Shetland'.

Transport

- To travel to Lerwick from Fetlar, you need to take two ferry journeys, spending approximately one hour on the ferries and then make a 1.5 hour road trip.
- The SIC has approved the abolishment of all fares on Bluemull Sound and the night supplement on Yell Sound from September 2005 until March 2008.
- The ferry runs from Hamars Ness to Belmont and Gutcher on a daily basis. There are approximately 6 runs to and from Hamars Ness although this varies by day.
- Ferry jobs are crucial to the island's economy.
- It is believed by the islanders that it is very important that a ferry is based on Fetlar. The Initiative at the Edge (latE) meeting also revealed the desire for a more frequent ferry service to Fetlar. In particular, it was felt that there is a need for a late night sailing, so to enable commuters to attend evening events on the mainland without having to stay overnight. It has since been noted that late sailings are now available four nights from six, Monday to Saturday departing Gutcher at 2250 and Hamar's Ness 2335.
- The need for increased ferries at the weekends was also viewed as important in allowing Fetlar residents access to the leisure facilities on Yell and Unst.
- An integrated bus/ferry service operates to and from Lerwick from Fetlar, Unst and Yell. This bus takes approximately 3 hours and a single fare is costed at £4.80.
- Royal Mail operates a post car offering a limited service between the post office and the ferry terminal.
- There is a desire to see internal transport developed in Fetlar. There is support for taxis, minibuses and dial-a-ride services, although it is believed that it would not be viable for islanders to individually operate such services, thus funding would be required.
- Fetlar requires flexible public transport that is better integrated with the ferry timetable. The need for more understandable timetables was also noted by Fetlar residents at the latE event. There are three different timetable versions including a basic one page version, a version as provided on the internet with connections, and a new version which shows all departures and destinations from each port.
- Car ownership levels have grown on the island between 1991 and 2001. In 1991, the proportion of the island's households that did not own a car or van was 45% but by 2001 this figure had dropped to approximately 26%. The number of households with two or more cars or vans was 21% in 1991 but increased to 36% by 2001.
- There is an air strip located on Turra Field, which is used for charter flights or for medical emergencies. At the latE event, it was stated that the emergency plane service must be safeguarded and the airstrip maintained.
- The Fetlar population are generally supportive of the aspirations for an Unst-Yell fixed link, although it is believed that this should not be at the expense of a reduced ferry service to Fetlar. There are also some questions surrounding what impact a Unst-Yell fixed link would have for Fetlar.
- Fetlar's roads are generally thought to be good, although there are some areas where resurfacing is required.
- Health related services are believed to be hampered by the ferries. Pregnant women in particular encounter problems in accessing health services including antenatal classes.

Population

- Fetlar has experienced considerable population decline in the region of 15% between 1981 and 2001. The current population is around 80.

- The island's population is generally ageing, reflected by the fact that the proportion of residents aged between 65 and 84 is significantly higher than the Shetland average. There are concerns that a lack of transport for the elderly can lead to social exclusion.
- Fetlar finds it difficult to retain younger members of its population, with the proportion of residents on the island aged between 20 and 29 significantly lower than the Shetland average. This could reflect a lack of new employment opportunities.
- The school roll at Fetlar Primary School is also declining.
- Children from Fetlar attend Anderson High School.

Economy

- The main industries in Fetlar are health and social work, and public administration. Agriculture and manufacturing also play an important part in the island's economy, whilst there is also some employment in the construction and fishing industries.
- Declining populations of economically active people makes it difficult to attract new employers to the island. Industries in the area also face greater problems than Shetland's Mainland based industries because of the increased time and cost of transportation.
- The community have identified the need for a breakwater at Harmars Ness. A lack of pier and marina is prohibitive to the development of the aquaculture and fishing industries, as well as any potential tourist boat trips.
- The local economy on Fetlar is heavily dependent on crofting agriculture, but it is noted that crofting incomes are in decline. Absent landlords and under-used crofts are the current key land issues detrimental to Fetlar's agricultural economy.
- There is a need to diversify the island's economy.
- Tourism plays an important part in Fetlar's economy, with the island's natural environment and ornithology the major tourist draws. The Fetlar Interpretive Centre, a retreat complex run by an order of nuns, and the annual midsummer Foy also attracts a number of visitors to the island.
- A working 'model croft' is an option currently being considered to utilise underused crofting land as a test bed for new farming techniques and demonstrator of good agricultural practices whilst also acting as another tourist attraction.
- Besides a B&B and several self-catering units, there is also a campsite on Fetlar and it is believed that, given the number of vacant properties on the island, further tourist accommodation could be established.
- Through the ongoing IatE process, it has been found that there is a desire to attract further tourism to the islands. For this to happen, it is suggested that transport information needs to be improved for visitors.
- The development of information and communications technology (ICT) on Fetlar could help promote economic activity whilst retaining the local population on the island. Businesses in Fetlar already reap the benefits of modern technology and it is believed that the underused video-conferencing equipment located in the community should be better used and promoted as this helps to deliver services to the local community without the need for expensive travel.
- There is an aspiration to improve accessibility to education opportunities on the island through the use of ICT such as video-conferencing to Shetland College.

7. Foula Fact Sheet

- Foula is situated around 20 miles west of Shetland Mainland and, along with Papa Stour, falls into the Walls and Sandness Community Council area, which covers western parts of mainland Shetland. The island is just 3 miles by 2 miles, although it rises to 418 metres at its highest point.
- Foula has been classed as the most remote inhabited island in the UK. The small resident population of the island live on the narrow eastern coastal strip of the island in a number of small crofting townships.

Transport

- Foula has a small pier in Ham Voe. The ferry to Foula, called 'New Advance' is based on the island. This vessel carries 12 passengers as well as cargo. It should be noted however that the harbour is exposed and travel by sea is often dependent on weather conditions.
- Between May to September, the ferry crosses from Foula to Walls and back on Tuesdays, and Saturdays, whilst every second Thursday it calls at Scalloway. The Walls service departs Foula at 0930 and Walls at 1330, whilst the Scalloway service departs Foula at 0800 and Scalloway at 1330.
- Between October and April, the only scheduled sailings are to Walls every Tuesdays and Thursdays. This service departs Foula at 0930 and Walls at 1330.
- Ferries to the mainland take two and a half hours.
- There is a bus service from Walls to Lerwick. On Foula itself, there is no public transport.
- Ferry fares are £2.60 single to Foula. Children up to the age of 16 are 20p, while concessionary fares are free.
- As part of the interview process undertaken with Foula residents in the preparation of the Foula Community profile, 100% of those interviewed mentioned that threats to the ferry service is one of the major reasons that island residents leave the island/makes life harder on the island.
- There is a scheduled bus service that connects with the sailing from Foula to Walls. However, there is no direct connection to this service from the ferry terminal for islanders arriving from Foula at Walls.
- Threats to the ferry service causes uncertainty over supplies for the school and residents.
- There is also a small gravel airstrip on the island that is served from Tingwall airport. Air travel to Foula is dependent on the weather, and is affected by crosswinds and fog.
- During the summer, Loganair flights to Foula leave Tingwall Airport every Monday, Tuesday, Wednesday and Friday. Typically there is one return service on Mondays and Tuesdays. On Wednesdays and Fridays there is an additional return service in the afternoon.
- In winter time, morning flights take place every Monday, Tuesday, and Wednesday. On Friday, there is also a return service in the afternoon.
- Single air fares cost £25 and flights to Tingwall take around 15 minutes.
- Published statistics show that the number of trips made using the air service has increased on the island over the past few decades. In 1981, 1,175 passengers travelled to Foula with Loganair, but in 2002 this had increased to 1,378. These statistics appear not to reflect the growth in trends observed by the islanders themselves.
- Most islanders have a car, and no MOT is required. Drivers aged over 17 can drive without a passed driver, provided they have a provisional licence.
- Foula has 5 miles of public single track roads, with some passing places and cattle grids at township gates.
- There is a limited salting and gritting service. Although there are grit bins, there are issues with maintenance of these.

Population

- According to census statistics, there has been a population decline of 29% between 1981 and 2001 on Foula. According to the 2001 census, there were 32 residents on Foula, down from 42 in 1991 and 45 in 1981.
- 20% of the population are aged under 15, 24% are aged between 15 and 35, 20% are between 30 and 60, and the remaining 36% are 60+.
- The number of pupils at Foula Primary School has remained relatively stable over the past thirty years or so. At present there are two primary school pupils and one child at the nursery. This school is also central to the delivery of community activities on Foula.

- There is no secondary school on Foula, and children must attend secondary school on Shetland Mainland and live in hostel accommodation. This has an impact on the island's population. The Community Profile also found that 75% of residents said that children leaving the island to attend secondary school was a major reason for people leaving Foula.
- There is no shop on the island. The main service is the school, which doubles as a community hall. All provisions are grown locally or transported in by boat or plane.
- There is no doctor on Foula, although the island has its own nurse and a Shetland Mainland doctor holds an island surgery every 2 months. Emergency patients are taken by Loganair and in very bad weather by Coastguard search and rescue helicopter. This will change in April 2006 when patients will be transported by an oil industry ambulance helicopter. The uncertainty of availability when needed is causing concern in Foula according to the Community Profile.
- The Community Profile states that there is a need for new housing on the island. In the past there have been several enquiries from young people hoping to settle on the island, although these have come to nothing due to the lack of provision.

Economy

- Foula's residents are employed in an array of sectors which make best use of the natural resources.
- Six people are employed by the ferry service. Most of the work on Foula is part-time and most people are employed in more than one job.
- Crofting and fishing play an important role in islander's way of life on Foula, whilst tourism and new technology is becoming increasingly important to Foula.
- Crofting remains an important industry on the island, even though strong winds and salt spray makes this difficult. Hill grazing is noted as good on Foula, although severe weather can prevent stock from getting to market.
- Tourism and shell-fishing provide seasonal income, along with the sale of sheepskin, hand-spun garments and the traditional Foula ganzy. Visitors are attracted to the island for its variety of sea and moorland birds.
- Cycharterers based in Scalloway provide weekly tours to Foula aboard the MV Cyfish during the summer.
- Foula heritage was formed in 1999. Future plans of this group include restoration of an old mill and development of a heritage centre. This group also established a Ranger Service to provide information and guided walks for tourists in the summer. This scheme is run by three part-time job share islanders and local volunteers. 680 visitors used the service in summer 2003 – 50% more than estimated. Funding for this service is due to end in 2005 and there is a strong desire to ensure this service is continued to capture the benefits it delivers to the Foula.
- Foula Community Co-operative Ltd is an organisation involving most households in Foula. Projects undertaken by this group have included computer training and a START centre.
- It is believed that the introduction of new technology onto the island is positive both in helping to reduce feelings of rural exclusion and also in helping some islanders to support their crofting activity with computer work. The Foula Community Wireless Association was established in 2004 to capitalise on the Highlands and Islands Enterprise initiative to help put broadband technology in some of the regions most remote areas.
- It is stated that the island suffers regular technical problems with telephones and that an upgrade to the telephone system is urgently required. BT have promised to have this in place by the end of 2005, and this is currently underway on the island.
- Electricity is supplied by a generator, which is switched off for at least 5 hours each night. Demand exceeds supply, meaning for example that householders cannot have their Hoover and washing machine on at the same time. It is believed that the island could not cope with more residents because of the increase in demand for electricity.
- Some residents have stated that electricity constraints mean that it is not possible to work from home. It also limits the development of tourism and other employment opportunities. The lack of electricity also poses risks to householders, especially the elderly and housebound, and those with babies.
- Consultation was recently undertaken by the Foula Electricity Trust on a new system comprising wind turbines and solar panels to provide a reliable electricity supply 24 hours a day. 75% of residents said that a 24hour electricity supply would enhance islander's lives.

- It is believed that there is a lack of adult education classes and library services. There are no services for children outwith school. Distance learning is also difficult due to lack of reliable electricity supply, although broadband technology has increased this.

8. Gulberwick, Quarff and Cunningsburgh Fact Sheet

- The Gulberwick, Quarff and Cunningsburgh Community Council area covers the northern half of the South Mainland, located between Sandwick and Lerwick.
- Gulberwick is situated approximately 2 miles south of Lerwick, and comprises around 120 buildings. Gulberwick was originally a scattered crofting community, although there has been extensive housing development since the 1970s. Over-development in the area is said to be a concern of the local community.
- Easter Quarff is located a further two miles south of Gulberwick and has also approximately doubled in size over the last 30 years. Wester Quarff is a smaller settlement that has not been as extensively developed, and is located on the west coast, 1.5 miles west of Easter Quarff.
- Cunningsburgh, situated 10 miles south of Lerwick, is a large settlement on the main A970 road to Sumburgh airport. Cunningsburgh consists of two areas of local authority housing, with a small industrial estate and community hall at the north of the village. There are also a number of traditional crofting townships located along the A970.

Transport

- In terms of public transport, it is believed that the area benefits from the good public transport that operates between Lerwick and Sumburgh. However, it is noted that public transport does not go through the lower parts of Gulberwick or Cunningsburgh.
- From Monday to Friday there are 10 services that stop in Cunningsburgh, Quarff and Gulberwick. The first service from Cunningsburgh departs at 0735 and arrives in Lerwick at 0750. The last service departs Cunningsburgh at 2015 and arrives in Lerwick at 2025. There are six services on a Saturday, with the first departing Cunningsburgh at 0820 and the last departing at 1745. On Sundays there are four services, with the first departing at 1123 and the last at 1815.
- Additional local bus services that operate within the South Mainland include the:
 - Sandwick/Lerwick and Return Shopper Service (every second Monday).
 - Sandwick Local Dial-A-Ride Shopper Service (every Friday).
 - Cunningsburgh Local Dial-A-Ride Shopper Service (every Tuesday).
 - Cunningsburgh to Lerwick Shopper Service (every Thursday, departing Dandilgarth at 1100 and Lerwick at 1400).
 - Lerwick to Sumburgh late night service (every Saturday, departing Lerwick at 2300).
 - South Mainland Dial-A-Ride Shopper Service (every Friday).
- Transport issues raised in the Gulberwick, Quarff and Cunningsburgh Community Profile 2004, included the lack of bus service through Gulberwick, the Cunningsburgh loop and Wester Quarff; that there is a gap in the bus service on Saturday afternoons; and that there are believed to be road safety issues through Quarff.
- There is a high level of private car ownership, with many local residents commuting each day to Lerwick for work purposes.
- Community buses based in Sandwick and Lerwick are available for community group use in Gulberwick, Quarff and Cunningsburgh. There is also a minibus and taxi suitable for people with disabilities in Cunningsburgh.
- The Community Council statement, detailed in the Shetland Local Plan, states that the rapid housing development in Gulberwick over the past few decades has put severe strains on the provision of infrastructure, including roads.
- Apart from the main A970, the other major road in the area is the B9703 which is known locally as the Black Gaet. This road acts as a by pass for Lerwick and, like the A970, is believed to be in good order.
- There is a 50mph speed zone through Cunningsburgh.
- The Sustrans North Sea Cycle Route runs along the A970 and passes through Fladdabister and Aithsetter.
- In the Community Council statements, it was noted that road safety improvements were implemented in Quarff in the past few years due to a number of accidents.

- Residents in Gulberwick are said to consider the road to be in serious need of improvements, including improved verges for pedestrian safety, more passing places and better road drainage.
- It is stated that pedestrian access is difficult on many roads because there is little pedestrian refuge due to uncut verges.

Population

- The area has experienced population growth. For example, in Gulberwick/Quarff alone, the population was 398 in 1991 but this had risen to 662 in 2001. Similar trends have been recorded for the Sandwick/Cunningsburgh area where the population has grown from 1352 in 1991 to 1432 in 2001. The close proximity of the area to Lerwick is said to be a reason for this growth.
- The overall population of the Gulberwick, Quarff and Cunningsburgh Community Council area is approximately 1180. It is believed that the area's close proximity to Lerwick will encourage further growth in the future.
- There is a modern primary school at Cunningsburgh. The school role at Cunningsburgh has remained relatively stable over the decades, typically ranging from between 50 to 60 pupils. The school role at Quarff however was much lower and in 2003 was just 14. A reason for the decline in school role at Quarff Primary was attributed to more and more children being taken to schools in Lerwick, as this is more convenient for parents who also work in the town. In 2003 Quarff Primary School was closed.
- Health provision for the area is from Levenwick and Lerwick Health Centres.

Economy

- It is believed that there is considerable potential for the development of renewable energy projects, due to the exposed nature of parts of the area.
- The Brindister aggregate quarry is a main employer in the area. It is estimated that the quarry employs 15-20 people directly, in addition to spin-off employment related to the haulage and service sector. The quarry contains reserves of old red sandstone, which is used for road surfaces in the UK mainland. This is transported by large trucks and exported via Greenhead in Lerwick and Blackness Pier in Scalloway.
- In addition to the quarry, private sector employment is provided by local building contractors.
- Agriculture and crofting is also still important in the area, although there is said to be increasing pressure on agricultural land through increased house building. There are also several home based knitwear enterprises. In Cunningsburgh, there is also a company that manufactures garden stoneware.
- The large majority of the remainder of the population commute to Lerwick, or further afield, for work purposes.
- It is stated that any future expansion of aquaculture is limited in the area given the lack of sheltered voes. There is currently some limited lobster, shellfish and inshore fishing in the area.
- Many tourists pass through the area as it is on the main road from Sumburgh airport. However, with the exception of the golf driving range, there are few tourist facilities to capture the benefits that this passing trade could deliver to the local area.
- It is believed that there is a need for better developed tourist facilities (i.e. signs, brands, maps) and that the potential for walking, and exploring local history is largely untapped. The lack of cafés, pubs and restaurants was also noted.
- The annual south mainland agriculture show is held in Cunningsburgh.
- There is a local marina at the sheltered Aith Voe east of Cunningsburgh, constructed recently.

9. Lerwick Fact Sheet

- Lerwick is Shetland's principal town. It is estimated that around a third of Shetland's total population live in Lerwick.

Transport

- There has been significant investment in Lerwick's transport infrastructure in recent years with improvements to roads, traffic management, and signage, car parking, street lighting, pavements and public transport infrastructure.
- The main public transport services in Shetland all gravitate to Lerwick. Within Lerwick itself, there is a town centre bus service that departs from the Esplanade and follows a North Lerwick or South Lerwick loop at alternate half-hour intervals. This service is well used, particularly for travel to work and by children to and from school. A round trip costs 70p. The first service departs at 0830 and completes the loop at 0855, whilst the last service departs the Esplanade at 1705 and completes the loop at 1733.
- An additional local bus service in Lerwick is the SBS Greenhead Base service to the Esplanade, which departs from the SBS base at 5pm Monday to Fridays.
- Lerwick Viking Bus Station acts as the main public transport hub for all rural services into Lerwick.
- The 'Being a Young Person in Lerwick and Bressay' survey revealed that youths in Lerwick would like to see a more regular bus service, particularly at night.
- Lerwick is Shetland's main general port and is the ferry terminal for ferry services to Orkney, Aberdeen, Faroe, Iceland, Norway and Denmark.
- In addition, Lerwick accommodates inter-island ro-ro ferry services from Bressay, Out Skerries and Fair Isle.
- With regards to the Bressay ferry service, the first ferry leaves Lerwick at 0715 to embark on the seven minute sailing to Bressay. The last ferry leaves Lerwick at 2300 except on Fridays and Saturdays when the last ferry leaves at 0100. There are 22 services each way from Monday to Thursday and 24 on Friday and Saturday. On Sundays, there are 18 services throughout the day with the first ferry leaving Lerwick at 0715 and the last ferry leaving Lerwick at 2300.
- There are also ferry services available to Out Skerries from Lerwick. On Tuesday and Thursday the ferry leaves Out Skerries at 0800 and the return leaves Lerwick at 1445.
- In the summer, there is also a fortnightly sailing into Lerwick from Fair Isle.

Population

- According to census statistics, the population of Lerwick has gradually declined in recent times. For example, in 1991 the population was 7,336 but in 2001 this had declined to 6,830.
- Anderson High School is the largest secondary school in Shetland. The school also accommodates some of the island pupils who stay in the nearby hostel. In 1991, the school roll at Anderson High was 878, but this dropped to 820 in 2001. However, the school roll appears to be on the increase again, as the school roll stood at 894 in 2003. It is also noted that there are plans to develop a new Anderson High School.
- There are two primary schools in Lerwick: Bells Brae and Sound. It is believed that both are near to their capacity.
- There is a good range of sports and leisure facilities in Lerwick, many of which are based at the Clickimin Sports Complex. This was recently redeveloped and is the largest and most comprehensive sports facility in Shetland. Shetland also hosted the 2005 Island Games, with many of the events held in Lerwick.

Economy

- Lerwick is the main employment centre in Shetland. The majority of people work in the service sector, due to Lerwick being home to various Government Agencies and Departments, the main Council Offices, the Health Board and hospital, together with Anderson High School, banking and private sector office services.
- Commercial activities are also centred in the harbour area of Lerwick. Lerwick Port Authority (LPA) has invested heavily in repairs and upgrading facilities at the harbour in

recent years to meet the increasing demands of harbour users including the fishing, ship repair, cargo distribution, aquaculture, oil and gas and tourism industries.

- Lerwick Harbour is home to a substantial fishing fleet. It is estimated that approximately 4000 fishing vessels use the port each year, and that around 80,000 tonnes of shellfish, whitefish, pelagic fish and industrial fish, valued at around £20 million in total, travels through the port. Oil related vessels also use Lerwick Harbour.
- Tourism is becoming an increasingly important industry for Shetland, and particularly in Shetland where there are five hotels, a youth hostel and numerous guesthouses, B&Bs and self-catering accommodation.
- It has been estimated that over forty cruise liners visit Lerwick in a single summer season. In addition, it has been suggested that between 300-400 yachts visit Lerwick each year, bringing thousands of tourists.

10. Nesting and Lunnasting Fact Sheet

- Nesting and Lunnasting is the Community Council area situated on the east coast of the Shetland Mainland. Nesting (located 10 miles north of Lerwick) and Vidlin (22 miles north of Lerwick) are the main settlements in the area.
- In addition there are a number of smaller settlements at Garth, Skellister, Gletness and Kirkabister.

Transport

- The area is the main arrival and departure point for ferries to and from Whalsay and the Skerries. Laxo is the location of the main ferry terminal for the Whalsay ferries, whilst the Skerries ferry leaves from Vidlin. During periods of bad weather, the Whalsay ferry often travels to Vislin because this route provides a more sheltered passage.
- Public transport bus services are provided by way of the Lerwick-Laxo-Vidlin-Lerwick service that runs twice daily so to link in with the main commuter ferry sailing in the morning and evening.
- This service is also supplemented by the South Nesting feeder bus which is timed to connect with both Lerwick and Sullom Voe buses.
- Park and Ride facilities are provided at Loch of Girston (B9075) and Loch of Voe (B9071)

Population

- The population in Nesting and Lunnasting has remained relatively stable over the past few decades and increases have occurred in some areas. For example, in 1991, the population in Nesting was 512 and in 2001 this had increased to 570.
- The school roles at South Nesting Primary School and Lunnasting have fluctuated, with South Nesting showing an increase from 11 to 27 pupils between 1991 and 2001, and Lunnasting showing an increase from 21 to 26 pupils between 1991 and 2001.

Economy

- In terms of employment in the area, many people are crofters, mostly part time, and there is a substantial Salmon industry. There are also some people from the area who work at the Oil Terminal at Sullom Voe. There are also some people from the area who work at the Oil Terminal at Sullom Voe. There is also a fiddle maker 'Skyinbow' who provides employment.
- In addition to agriculture, aquaculture is a key industry in the area. There are mussel and oyster farms in Cat Firth and Wadibister Voe, whilst there are numerous Salmon farms throughout the area's voes.
- There are no industrial estates in the area. However a number of shore bases serve the aquaculture industry which has developed in recent years.
- The need to diversify the economy is recognised in the area, with the violin workshop pointed to as an example of best practice in merging traditional crafts with modern technology.
- Tourism is not a big industry in the area due to a lack of accommodation facilities and wet weather facilities.
- It is believed that there is significant potential for developing renewable energy initiatives in the area and in the past there have been speculative proposals for the development of up to 300 wind turbines.

11. Northmavine Fact Sheet

- Northmavine is the most peripheral area on Shetland Mainland. It is connected to the rest of the Mainland by Mavis Grind.
- Northmavine stretches from Mavis Grind in the south, to North Roe in the north and Eshaness in the west. The four main settlements are Hillswick, Ollaberry, North Roe and Sullom.

Transport

- There is a daily bus service from Hillswick to Lerwick. This links to the daily feeder service from North Roe to Brae. An improved public transport service would be welcomed to increase accessibility and reduce social isolation and exclusion.
- The Hillswick-Lerwick bus service operates twice daily with departures from North Roe at 07:20 and 09:40 in the morning. These services arrive in Lerwick at 08:45 and 11:05 respectively. However, the second service does not operate on Wednesdays.
- There is one returning service which departs Lerwick at 17:10 and arrives back in North Roe at 18:50.
- A single fare from Hillswick to Lerwick is £2.20.
- The local community has identified the need for potential footpath routes to connect community facilities in Hillswick, Ollaberry and North Roe.

Population

- The population of Northmavine is in decline. It is estimated that the current population is around 840. It has also been forecast that by 2011, this could be reduced to 740.
- Declining school roles further emphasise the area's declining population trends.

Economy

- The traditional industries of fishing and crofting have underpinned the local economy for hundreds of years, although it is recognised that both industries are under threat. Consequently, the need to diversify the local economy is being stressed more than ever before.
- The closure of the Ronas Fisheries factory in 2000 and subsequent jobs losses has had a negative impact on the local economy. Despite this, fishing is still a mainstay of the local economy.
- Collafirth pier, built in 1988, serves an important function for fishing and is home to one of Shetland's largest fishing boats. Other fishing boats operate from Hamnavoe and Hillswick.
- Aquaculture is becoming an increasingly important industry in Northmavine, with several large salmon farms operating in the coastlines sheltered voes. In addition to the salmon farms, there is a fish hatchery at Eshaness.
- In recent years, there has been capital investment at Sullom Voe oil terminal which continues to offer long term employment opportunities. The terminal is within reasonable commuting distance of the Northmavine area.
- Similar to the rest of Shetland, people's expectations of accessibility and the quality of services in Northmavine are increasing all the time. If the area fails to live up to these expectations, and facilities close, it is feared that the population that already commute out of Northmavine for work and social purposes may increasingly decide to relocate.
- There are concerns that a high dependence on facilities and employment out of the area could reduce ties and commitment to Northmavine.
- There is a perception within Northmavine that the area is neglected and forgotten. However, the area has recently been adopted as an Initiative at the Edge (IatE) area and is in the process of developing strategies to help regenerate the area.
- Northmavine's exposed location makes it an ideal location for wave and wind powered generators and the development of renewable energy initiatives in the area.
- There is support for the use and development of IT and telecommunications in Northmavine. It is stated that home-working should be encouraged in the area.
- There is also a desire to increase the area's tourism potential. The area is famed for its outstanding natural environment, spectacular views, walking opportunities and wildlife.

However, it is noted that the remoteness of the area limits the number of tourists visiting Northmavine. Improved transport connections and further marketing could help to increase the accessibility and appeal of the area to visitors.

- There is a lack of wet weather visitor attractions and thus the development of new visitor attractions would be welcomed in the area to help Northmavine take greater advantage of its untapped tourist potential.

12. Out Skerries Fact Sheet

- The Out Skerries is known as 'the friendly isles' and is Shetland's (and Scotland's) most easterly outpost. The Out Skerries consist of a small group of island and rocks located around 9 miles to the east of the Shetland mainland and about 5 miles north east of Whalsay.
- There are three main islands, Housay (West Isle), Buray (East Isle) and Grunay, which is currently uninhabited. Housay and Buray are joined by a bridge. In total, the land area of these three islands is little more than a square mile.

Transport

- The remote nature of the Skerries means that frequent ferry links provide an essential lifeline link to the island. The Skerries is served by a passenger and vehicle ferry which departs from the Skerries and runs twice weekly from Lerwick and ten times per week from Vidlin.
- A new vessel called the Filla, which can carry up to 9 cars and 30 passengers, is used on the Skerries route. This service berths overnight in Whalsay.
- There is one ferry service on Mondays, Tuesdays and Thursdays, and three services on Fridays, Saturdays and Sundays. A single adult fare is priced at £2.60.
- The local community have experienced many problems with the new Filla vessel and have made the point that the performance of the service using the North entrance is far below what was expected and is not satisfactory in terms of either reliability or comfort.
- The community feel that the biggest difference between the old Filla and the new Filla is that if the old Filla could make the passage it would be able to get into Skerries. Whilst the new Filla can get across, it may not necessarily get into island due to conditions in the North East entrance. This means that it is often down to luck as whether journeys happen or not.
- Fishing boats have been known to collect people from the Skerries when the ferry hasn't run in the past. It has been suggested, therefore, that if the south entrance was navigable by the new Filla, then the ferry could have run.
- There is an 18 berth marina at Stringa Voe.
- Other transport infrastructure is provided by a short stretch of road, less than 1km long, which travels around the harbour, through the main settlements, and across the bridge connecting West Isle to East Isle.
- There are a number of blind corners on this road and it is believed that a safety audit should be undertaken to establish areas where road improvements are necessary.
- Air transport is provided from a gravel airstrip on Bruray with regular flights from Tingwall airport operated by Loganair. The Air ambulance sometimes called for minor things if the ability of the ferry to sail looks "iffy".
- The air service operates on Mondays, Wednesdays and Thursdays only. On Mondays and Wednesdays there is one flight from Tingwall and two flights on Thursdays. The service also calls in at Whalsay on request. The service takes 20 minutes and a single fare costs £19.50.
- There are no internal public transport services on the island.
- Car ownership trends on Housay have significantly increased between 1991 and 2001, even though the area has experienced population decline during this period. In 1991 the proportion of households with no cars or vans was 31% on Housay but in 2001, this figure had decreased to 22%. Also, the percentage of households with 2 or more cars or vans was 24% in 1991 but by 2001 this figure had increased to 47%.

Population

- The Skerries has an ageing population and have experienced a population decline of 14% between 1981 and 2001. The population currently stands at around 75.
- The proportion of residents aged between 60 and 84 on the Skerries is 28% whereas the comparable level for Shetland is 17%, emphasising the island has an ageing population. there are many retired people (19%) which further suggests that the Skerries has an ageing population. There is also a lower proportion of youths on the island.

- People with family on the mainland are prevented from having a fully inclusive relationship due to the unreliability of the ferry service. Examples of this include: social events like the Folk Festival have stopped using Skerries because there are concerns that the unreliability of the ferry service could mean artists being stuck in Skerries and hence disrupting the whole of the festival; weddings being held on the mainland due to concerns over the reliability of the ferry service, and problems with the teacher commuting to the school.
- The example was also given of elderly and young people not wanting to travel after having experienced several trips where they set off for Skerries only to find they can't get in and have to return, therefore being exposed to a 3 hour very unpleasant journey.

Economy

- Industry associated with the sea is the main employer on the island, including deep sea and inshore fishing and aquaculture. Several fishing boats are based at the harbour whilst there are fish cages throughout the sounds surrounding the island. The Council recently completed dredging of the harbour to allow for its use by larger boats.
- There are just as many part time employees as there are full time employees, which reflects the heavy reliance that residents on the Skerries have on the fishing industry.
- There is a salmon packing station located at the ferry terminal whilst a salmon farm shore is based on West Voe in Housay.
- The unreliability of the ferry service means that current businesses are being subjected to pressures that mainland based growers and processors are not. For example if a boat is delayed for a day or two this can lead to salmon feed not getting in or seafood with a short shelf life not getting out.
- It has been suggested that the Scallop factory wants to pursue retail instead of wholesale and has the potential to go full-time instead of part-time, but these opportunities are constraint by a lack of confidence in the ferry service, as scallops have a shelf life of 14 days from being caught and therefore the factory needs a more reliable service to guarantee getting the product to its market. Wholesale is £10.50 per kilo instead of £16.80 for retail.
- Salmon fishing is also beginning to start up again and requires reliable routes into markets. It is stated that reliable routes are not just important for the Skerries, but also the restaurants that the Skerries will supply. The unreliability of the ferry service therefore has wider implications because if restaurants can't give reliable service then their reputation will suffer and therefore Shetland's reputation will suffer.
- The community feels that, with the current level of disruption (throughout the entire year), the reputation of the factory (and the developing "new" salmon industry) will quickly suffer.
- Increasing uncertainty associated with the fishing industry places more emphasis on diversifying the local economy, although the Community Council acknowledges that the islands remote location is a limiting factor in this aim. Nevertheless, it is believed that new technology can help provide new employment opportunities that were not previously possible.
- One example where new technology has been used to the benefit of the island is the START centre at Parkside in Housay which offers IT facilities including an archiving service that puts paper information onto computer disks.
- The island's ornithology and its remoteness are key attractions for visitors. However, it is felt that the unreliability of the ferry service constrains the islands tourist potential because if tourists can't get in then the reputation of the island suffers and the benefits of the island don't get advertised. Tourists visiting the island are known to have curtailed their visit if the forecast is dodgy and poses question marks over the ferries operation.
- The annual Round Skerries Yacht Race is a major social celebration on the Skerries.
- Information and communications technology could be better used and promoted as this may help deliver services to the local community without the need for expensive travel.
- In 2001, the Skerries Airport Trust planned to extend the runway and received funding for this. However, no works were undertaken and, after taking account of economic problems that have befallen the Skerries in recent times, it was agreed to transfer the airstrip funds into a Community Development Account to help develop the economy and infrastructure within Skerries.
- The exposed location of the Skerries makes the islands a suitable site for renewable energy initiatives using wind and wave generators.

13. Papa Stour Fact Sheet

- Papa Stour is located 2 miles off the west coast of Shetland Mainland. The island has a small crofting population, with housing and cultivated fields concentrated around Housa Voe and the south east corner of the island.

Transport

- Housa Voe has its own pier, served by the ferry from West Burrafirth. The crossing time is approximately 35 minutes, and the fares in each direction are £2.60 for adults and 20 pence for children.
- The Council has constructed a new pier on Papa Stour which accommodates a new ferry with ro-ro facilities. Toilets and a multipurpose building that it is hoped can be used by a doctor have also been provided at the new pier.
- In the winter, there is one ferry on Mondays, leaving West Burrafirth at 0900 and Papa Stour at 1000. There are two ferries on Wednesday departing West Burrafirth at 0900 and 1300 and Papa Stour at 1000 and 1345. There are two ferries on Friday and Saturday departing West Burrafirth at 0900 and 1800 and Papa Stour at 1000 and 1845. There is also one ferry on Sunday departing West Burrafirth at 1500 and Papa Stour at 1545. There is no ferry on Tuesday or Thursday. Evening sailings will only take place if bookings are made.
- A similar frequency operates in the summer with the notable difference being that the Sunday service departs West Burrafirth at 1800 and Papa Stour at 1845. This sailing only takes place if a booking is made.
- There is a dial-a-ride service that operates from West Burrafirth Pier to Lerwick on Mondays, Fridays and Saturdays only.
- Loganair operate flights to the island from Tingwall. A single fare is £17.50.
- In the summer, there are two flights on Tuesday departing Tingwall at 0900 and 1600 and Papa Stour at 0920 and 1620.
- In the winter period, the level of service remains the same although the second flight departs Tingwall at 1500 and Papa Stour at 1520.

Population

- Papa Stour has seen its population decline in the region of 30% between 1991 and 2001. According to census statistics from 1991, there were 35 residents on Papa Stour, and in 2001 this had dropped to 24. At present there are 22 residents on the island.
- There are some doubts over the future of Papa Stour Primary School as throughout its lifespan, there have been years when there has been no school roll. A statement from the Community Council taken from the Local Plan states that if no families with children settle on Papa Stour, the school will be 'mothballed'. This occurred in September 2005.
- Almost half of the island's population have moved from other areas of the UK – some in response to a national plea for settlers in the face of depopulation in the 1970s.

Economy

- The main crux of economic activity on the island centres around crofting, although some people fish part-time in their own boats or other Shetland vessels.
- Tourism also plays a part in the local economy with a small number of visitors arriving on Papa Stour each year for the island ornithology, walking, canoeing and sub-aqua-diving opportunities. In particular, Papa Stour is renowned for its sea caves. However, the potential for the island to capture the benefits of tourism are limited, as there is no B&B on the island.
- There is a backpacker's hostel in Papa Stour, although this is attached to one of the properties that is currently up for sale on the island.
- There is no shop on the island, and the Post Office has recently closed. Mains electricity only came to the island in the early 1990s.

14. Sandsting and Aithsting Fact Sheet

- The Sandsting and Aithsting Community Council area covers approximately half of Shetland's 'Wastside'. The settlements are generally located at the heads of the sheltered voes, reflecting the area's roots in crofting and fishing.
- The area's main settlements are Aith, Bixter and Skeld. There are a number of smaller crofting communities at Tresta, Clousta, and Sandsound, Reawick and Westerskeld.

Transport

- The A971 from Walls links the Sandsting and Aithsting area to Lerwick. Most of the other roads in the area are single track with passing places.
- The Sustrans North Sea cycle route travels through the area via Bixter and Aith.
- In 2001, the Bixter Brae improvement scheme on the B9071 towards Aith was completed. Further road improvements outlined in the Sandsting and Aithsting Community Council statement, as detailed in the Shetland Local Plan, included:
 - Road improvements continued for a further mile and a half towards Aith to Paets of Twatt;
 - The provision of a parking area in Bixter at the B9071 junction to provide a park and ride area, so to encourage car sharing and greater bus use;
 - Improvement to the B9071 from Park Hall to the Sand Junction.
- There are a number of public transport services that operate in the area. Most notably, there is an Aith-Lerwick-Aith service on Mondays to Fridays. During the school term, there is one service per day that departs Aith at 0800 and Bixter at 0810 and arrives in Lerwick at 0835. For those who start before 9am, there are subsequently issues with travelling into Lerwick using public transport. Outwith school term, this service connects to the mainline service to Lerwick.
- During school term, the returning service departs Lerwick at 1540 and arrives in Bixter at 1610 and Aith at 1620. Another service departs Lerwick at 1705 and arrives in Bixter at 1735 and Aith at 1750.
- There is also a Saturday service that departs Aith at 0800 and Bixter at 0815 and connects with the mainline service to Lerwick. The return service Lerwick at 1705 and arrives in Bixter at 1735 and Aith at 1750.
- The fare from Aith to Lerwick is £2, whilst from Bixter to Lerwick it is £1.55.
- Other services include:
 - The Skeld – Bixter feeder service that departs from Westerskeld, Skeld, Reawick and Bixter in the morning, connecting with the 0815 Bixter to Lerwick.
 - The Skeld – Bixter Shopper Service, which operates on Thursdays and Saturdays only. This connects with the 1345 Bixter to Lerwick service. There is a return service from Lerwick at 1705.
 - The Clousta – Aith – Sandsound – Lerwick service operates Thursday only departing 1030 from Clousta and 1045 from Aith. This arrives in Lerwick at 1130.
 - The Lerwick to Walls/Aith service every Saturday departing Lerwick at 2230.
 - The Bixter to Aith and Return service, which operates every second Sunday departing Bixter at 0925 and Aith at 1115.

Population

- According to the Community Council statement, the population of the Sandsting and Aithsting area is in slow decline, falling from around 841 in 1981 to a projected figure of 740 in 2011.
- There is a primary school in Skeld and a Junior High School in Aith which provides nursery, primary and secondary departments.
- Skeld Primary has seen its school rolls gradually increase in recent years. For example, in 1991 there were 14 pupils, and in 2003 this had increased to 20 pupils. Aith Junior High has also seen its school roll increase from 61 in 1991 to 94 in 2003. The secondary roll at Aith Junior High has also increased from 61 in 1991 to 94 in 2003.
- In Aith, there is a general store, PO, fuel pumps and garage. There is also a relatively new leisure centre with swimming pool. In Bixter, there is a general store that also offers fuel, a vet's surgery, PO and a craft shop. There is also a car garage.

- A new health centre was opened at Bixter in 2002. In addition, the local doctor also holds outreach surgeries at Skeld, Aith and Weisdale.

Economy

- Agriculture and crofting underpin the local economy. Other traditional industries include knitwear production. For example, sheepskin rugs are produced in Aith.
- The need to diversify the local economy has been identified.
- There is a small industrial site at Skeld. This is home to the Shetland Smokehouse, which produces smoked fish products.
- Several small fishing and lobster creel boats operate in the area, berthing mainly at the piers in Aith and Skeld.
- An increasing emphasis is being placed on the aquaculture industry, especially in Aith and Sand, where there is a large salmon farm and fish packing station.
- It is believed that the area has significant potential for the development of renewable energy initiatives.
- It is noted in the Sandsting and Aithsting Community Council statement, detailed in the Shetland Local Plan, that Skeld Pier Trust propose to construct a breakwater as part of the Skeld Waterfront Redevelopment Project.
- The Skeld Waterfront Redevelopment Project is an ambitious community led venture to regenerate the area around the pier providing a breakwater, marina and onshore tourist and other facilities.
- Given the area's natural beauty, it is a popular tourist destination. It is hoped that the Skeld Waterfront Development Project can further attract visitors to the area.
- Although there is some self-catering accommodation, on the whole it is believed that there is a shortage of B&Bs in the area.

15. Sandwich Fact Sheet

- The Sandwich Community Council area covers the east coast of the south mainland of Shetland. Its boundaries lie 14 miles south of Lerwick and 12 miles north of Sumburgh.
- Sandwich is a dispersed community comprising numerous clusters of buildings scattered around the lowland landscape. The largest of these are located at Setter, Leebitton, Central, Stove, Swinister, and Hoswick.
- Sandwich was awarded the Scottish Community of the Year Award in 1999.

Transport

- Due to its location in between Sumburgh and Lerwick, a large proportion of the local community commute to work in each of these areas.
- It is believed that Sandwich has good road links to Shetland's main spinal road, the A970 to Lerwick, Sumburgh and Sullom Voe.
- In terms of public transport, it is believed that the area benefits from the good public transport that operates between Lerwick and Sumburgh.
- From Monday to Friday there are 9 services that stop in Sandwich on their way to Lerwick. The first service from Sandwich departs at 0730 and arrives in Lerwick at 0750. The last service departs Sandwich at 2010 and arrives in Lerwick at 2025. There are six services on a Saturday, with the first departing Sandwich (Hoswick) at 0810 and the last departing at 1730. On Sundays there are four services, with the first departing at 1118 and the last at 1805.
- Additional local bus services that operate within the South Mainland include the:
 - Sandwich/Lerwick and Return Shopper Service (every second Monday);
 - Sandwich Local Dial-A-Ride Shopper Service (every Friday);
 - Cunningsburgh Local Dial-A-Ride Shopper Service (every Tuesday);
 - Lerwick to Sumburgh late night service (every Saturday, departing Lerwick at 2300);
 - South Mainland Dial-A-Ride Shopper Service (every Friday).
- The Sandwich Community Council statement, detailed in the Shetland Local Plan, states that there are about half a dozen bus stops located throughout the village, which enables people to catch the bus relatively close to their homes.
- There is one taxi operator in Sandwich. There is also a community minibus based in Sandwich available for community use.
- Transport related issues raised in the 2004 Sandwich Community Profile included:
 - the requirement for a wider pool of minibus drivers;
 - public transport timetables could be improved at weekends and evenings;
 - Transport to the Levenwick Surgery and to the Gilbert Bain Hospital can often be problematic, especially for those in the more rural areas. Prescription collection is also a problem for some people due to their transport issues;
 - Road improvements to the Swinister road are seen as a priority;
 - A lack of petrol pumps in the area is a problem.
- There are also believed to be some road safety issues related to young drivers (i.e. speeding, drink-driving).
- Mobile banks and mobile libraries also serve the area. These can be valuable services to those who find it difficult to travel to the main service centre in Lerwick.

Population

- The population of Sandwich has remained relatively stable at around 880 for the past 20 years or so. Despite this, the Sandwich population is projected to decline to 810 by the year 2011, in line with the projected decline in Shetland as a whole.
- The secondary school roll at Sandwich Junior High has gradually increased in recent years. For instance, there were 144 pupils in 1991, but by 2003 there were 167. The primary school roll at Sandwich Junior High has also increased in recent years. For example, in 1991 there were 69 pupils in the primary school but this had increased to 86 in 2001 and 90 in 2003.

- In terms of age structure of the Sandwich population, it is interesting that for all ages between 0 and 24, the number of Sandwich residents in this band is below the Scottish average.
- It is believed that there is good provision for young people at the Sandwich Youth and Community Centre. The school also provides a range of after-school and sporting opportunities.

Economy

- Sandwich is increasingly becoming a commuter village. However, there is still some local employment through the traditional industries of agriculture and knitwear. There is also significant employment at the Junior High School and adjacent swimming pool.
- The uninhabited island of Mousa lies to the east of Sandwich. A seasonal ferry runs between Wick of Sandsayre and West Ham on Mousa. There are numerous pleasure and wildlife-watching tours to the island.
- It is believed that there is considerable tourist potential in Sandwich and this is principally related to the island of Mousa. It is stated that given the island's recent status as an RSPB reserve, there is even greater potential to improve tourist facilities and attract more visitors. There are several B&Bs and a hotel in Hoswick, which is just a few minutes away from the local visitor centre and café.
- Interestingly, the community profile found that in terms of community aspirations for the next 20-30 years, an increase in home working or working from various local community buildings was cited. The decentralisation of council functions to the area was also suggested.
- In the past, there was an aerogenerator in Sandwich, although this was removed. Nevertheless, it is believed that there is potential for renewable energy projects in the area.

16. Scalloway Fact Sheet

- Scalloway is the historic capital of Shetland, and is located approximately 7 miles from Lerwick.

Transport

- There is a Scalloway-Lerwick bus service Mondays to Saturdays. The first service departs Scalloway at 0730 and arrives in Lerwick (Viking) at 0750. The last service departs Lerwick at 1910 and arrives in Scalloway at 1925. There are approximately 12 return services a day at approximately hourly frequencies. There is also a late night Saturday service which departs Scalloway at 2100 and arrives in Lerwick at 2120. There is no service on a Sunday. It costs £1.20 for a single journey between Scalloway and Lerwick.
- There are also departures from Scalloway to Lerwick at 1850 Mondays to Saturdays. A service also arrives at 1925 in Scalloway from Lerwick. This is part of the Walls to Lerwick service.
- It has also been stated that the introduction of more evening bus services would be welcomed.
- Traffic calming in the form of speed humps were introduced in 1994 along Main Street but these proved very unpopular with local residents and were subsequently removed. Parking restrictions however were introduced in 2000 in an effort to improve safety in the village.
- A Community Profile was developed in 2004, which included community consultation and questionnaire. Some of the key transport related findings from the questionnaire are listed below.
- The majority of Scalloway residents travel 6-10 miles to work, suggesting they are based in Central Mainland, and most probably in Lerwick. 21% travel less than a mile, suggesting that they work in Scalloway.
- The majority of people in Scalloway travel to work with their own car (54%), followed by walking (15%). In terms of car ownership, 69% of respondents owned a car.
- 31% of respondents seldom use public transport, and 35% never use public transport. 34% use public transport monthly or more frequently. Of this total, 73% stated that they were happy with the service.
- The questionnaire also found that whilst 57% of respondents thought parking facilities in Scalloway were adequate, 36% thought parking facilities were inadequate and as such there may be room for further improvement of parking provision in Scalloway. It has been stated that people park on the pavement, which is dangerous as it causes young children and parents pushing prams to walk on the road.
- The desire for a petrol station in Scalloway was raised. In the 1994 community profile, the provision of a petrol station was ranked as the 7th most desired facility residents would like to see. In 2004 this had moved up and was ranked as the second most needed facility.
- The 2004 questionnaire asked respondents' views on a number of services. In response to bus shelter provision, 90% felt this to be 'good' or 'adequate' and only 10% thought it to be 'poor'. The mobile library was also generally well received.
- Although there was not much concern overall about crime in Scalloway, a number of residents noted drink-driving, bad driving and speeding motorists as issues of concern.
- There were a number of comments criticising snow clearing efforts in Scalloway.
- A 20mph speed limit in central Scalloway was suggested.

Population

- According to Shetland in Statistics, the population of Scalloway was 1,160 in 1981, but in 1991, the population had dropped to 802. In 2001, the population was estimated at 812.
- Scalloway enjoys a wide range of community facilities including a recently developed Youth Centre, swimming pool, and Scalloway Junior High.
- The secondary school roll at Scalloway Junior High has declined over the years. For example, in 1991 there were 179 pupils, in 1996 this was 153, in 2001 this stood at 129 and by 2003 this had declined further to 111. The primary school roll has also declined from 117 in 1991 to 84 in 2003.

Economy

- Scalloway is the main fishing centre on the west coast of Shetland. Many jobs on the island are still related to this industry.
- The community statement in the Local Plan notes that Scalloway has a relatively diverse economy, although given that much local industry is still influenced by external factors such as changes in regulations, climate change and global competition, there is still a need to further diversify the local economy.
- The importance of aquaculture has increased in recent years. The emerging shellfish industry is also believed to have potential to expand and provide additional employment opportunities.
- Blackness Pier is the centre of business and industry in Scalloway. There is also an industrial estate at Blydoit.
- It is believed that the oil and gas industry to the west of Shetland will expand in the coming years, and Scalloway lies in a good position to attract oil and gas related work.
- Other main employers in Scalloway include the Council owned Scord quarry and various other service outlets in the village.
- The North Atlantic Fisheries College offers employment opportunities for full and part-time teaching, as well as administration and catering staff.
- Tourism is believed to be a growing industry in Scalloway, with Scalloway Castle and Museum being the key tourist attractions. It is believed that proposals to provide new visitor facilities in Scalloway should be encouraged.
- East Voe Marina was completed in 2000, offering berthing space for local residents and visiting yachts.
- There is a golf course at Asta, which is an example of how crop diversification has brought the provision of leisure, employment opportunities and environmental improvements to the local area.

17. Tingwall, Whiteness and Weisdale Fact Sheet

- The Tingwall, Whiteness and Weisdale Community Council area occupies the centre of Shetland.

Transport

- Tingwall airport is the main hub for inter-island flights in Shetland. The terminal is the collection and distribution point for goods and passengers travelling to Fair Isle, Foula, Whalsay, Out Skerries and Papa Stour.
- Many residents in the Community Council area commute to Lerwick and Sullom Voe, which are both within easy access. Although it is agreed that the improvement of the A971 between Haggersta and Cova is urgent, it is felt that the road links in the area are of generally high standard.
- A number of public transport services operate in through the area.
- There is a Lerwick-Laxo-Vidlin-Lerwick service with buses departing from Tingwall at 0843 Monday to Saturday for Lerwick and departing Lerwick at 0725 and 1705 Monday to Saturday.
- There is also a service from Toft-Mossbank-Lerwick which travels through the Community Council area. There are 7 services per day, Monday to Friday, with the first service departing Tingwall at 0735 and arriving in Lerwick at 0750. There are six return services, with the first service departing Lerwick at 0755 and arriving in Tingwall at 0812, and the last service departing Lerwick at 1710 and arriving in Tingwall at 1720. However, on Tuesdays and Thursdays there is an additional service which departs Lerwick at 2145 and arrives in Tingwall at 2200. This service also operates at the weekend.
- The Walls-Lerwick-Walls service 5 times a day from Weisdale and Tingwall to Lerwick per day. The first service departs Weisdale at 0725 and Tingwall at 0735, and calls into Lerwick at 0745. The last service departs Weisdale at 1830 and Tingwall at 1840, and arrives into Lerwick at 1905. There are only 3 return services with departures from Lerwick at 0905, 1230 and 1705.
- The Aith – Lerwick – Aith service operates one return service per day Monday to Saturday. This service departs Weisdale at 0820 and arrives in Lerwick at 0835, whilst the afternoon service departs Lerwick at 1534 and arrives in Weisdale at 1600.
- In addition, there is a Weisdale/Whiteness/Stomfirth shopper service every second Tuesday.
- Furthermore, there is a taxi service between Tingwall Airport and Lerwick operated by Sinclair Taxis. This taxi costs £1.30.
- The Sustrans North Sea Cycle route travels through the area en route from Sumburgh to Toft.

Population

- The population of the area is gradually increasing, from 1,075 in 1981 to 1,148 in 1991, with a forecast projection of around 1,370 by 2011.
- The area has seen significant housing development in recent years, with an average of 16 new house completions per year since 1994.
- There are primary schools located at Whiteness and Tingwall. Whiteness Primary School had a school roll of 89 pupils in 2003. Tingwall Primary School has seen its school roll gradually increase from 50 in 1991 to 62 in 2003.
- There are community halls adjacent to the schools in Tingwall and Whiteness. There is a multi-court at Whiteness school and across the road is the Whitedale snooker club and the Strom Park sports field with pavilion.
- On three days a week, the doctors from Scalloway and Bixter hold surgeries at Kalliness.

Economy

- A large proportion of the local population in the Tingwall, Whiteness and Weisdale Community Council area commute to Lerwick for employment.
- The Tingwall Valley is one of the most fertile areas in Shetland and consequently, agriculture and crofting is still an important industry underpinning the area's economy.

- In addition to the airport at Tingwall, there is employment at the nearby industrial estate, which is occupied by a construction firm. There is also a slaughterhouse in Laxfirth.
- Aquaculture is becoming an increasingly important industry in the area, with shore bases at Weisdale and Wadbister Voes servicing fish cages in the Atlantic Ocean and North Sea. There are also fish hatcheries at the old mills at Girsta and Weisdale.
- The need to diversify the economy is a key aim for the Tingwall, Whiteness and Weisdale area, as stressed by the Community Council Statement detailed in the Shetland Local Plan.
- A good example of this has been the Shetland Jewellery Workshop with showroom at Soundside. This workshop manufactures silver jewellery for export and for the home market. A smaller company named Hjaltasteyn also manufactures jewellery from Weisdale for sale in Lerwick and by mail order.
- According to the Shetland Local Plan, it has been proposed to convert the glasshouses in Tingwall into a “tropical oasis”, providing a centre for education and tourist attraction. It was also suggested that a small café, with opportunities for meetings, conferences, and exhibitions could be staged at the centre.
- The area has significant tourism potential given the dramatic scenery, the airport and its close proximity to Lerwick. Outdoor activities are provided through a number of fishing lochs, the golf courses at Dale and Asta, and some excellent walking opportunities. There is also a good choice of hotels, self-catering and B&B accommodation for visitors in the area.
- The Shetland Textile Working Museum together with the Bonhoga Art Gallery and café is based in Weisdale Mill.
- There is clear potential to develop renewable energy in the area, as evident from the five aerogenerators at Burra Dale hill, which are connected to the national grid.

18. Unst Fact Sheet

- The North Isles is a group of three islands to the north east of Mainland Shetland: Yell, Unst and Fetlar. They are connected to each other through a triangular ferry service route on Bluemull Sound and are connected to Mainland Shetland by a ferry service across Yell Sound.
- Unst is the northernmost and third largest of the Shetland Islands, at 12 miles long and 5 miles wide. Unst is primarily grazed moorland with small, dispersed settlements located at the heads of several the island voes or inlets. Hermaness sits at the northern tip of Unst and the Muckle Flugga group of small islands lie a short distance north of Hermaness and are the most northerly point of the British Isles. The largest settlement in Unst is Baltasound on the east coast. Other main settlements are Uyeasound in the south and Haroldswick and Saxa Vord in the north.

Transport

- To travel to Lerwick from Unst, you need to take 2 ferry journeys, spending approximately 30 minutes on the ferries and a journey by road of 1 hour.
- The ferry, based on Gutcher in Yell, runs to Belmont on a daily basis providing sailings from approximately 06:35 to 22:50.
- Some residents would like to see a more frequent weekend ferry service.
- From the 14th of September 2005 until the 31st of March 2008, the SIC have agreed to scrap fares on the Bluemull Sound services.
- There is an aspiration for a fixed link from Unst to Yell, and from Yell to Shetland Mainland. A survey of the Unst population's views on a fixed link revealed that 85% of Unst residents were in favour of a fixed link to Yell.
- The development of a fixed link might increase the pressure for local roads to be improved to be able to cope with the likely increased traffic pressure.
- An 'overland' bus service is available, providing guaranteed return transport from Norwick to Lerwick. This journey takes approximately 3 hours to get to Lerwick.
- The bus service is believed to be good as it allows Unst residents to travel to Lerwick and back in the same day.
- There is also a bus service specific to the island which operates between Haroldswick, Baltasound and Belmont. This service operates both to a scheduled timetable, but also through dial-a-ride bookings on certain days. The first service on this route (07:35 from Baltasound) links with the integrated ferry/bus service to Yell which continues to Lerwick.
- Car ownership levels in Unst have increased between 1991 and 2001. For instance, in 1991 25% of households in Unst owned two or more cars or vans, but in 2001 this figure had increased to 31%.
- Drivers aged 17 with a provisional licence can drive on Unst without a passed driver. Also, vehicles on Unst do not require an MOT.
- Residents would like to see better use made of Unst airport, such as for tourism.
- In line with the downturn in the oil industry, activity at the airport has gradually reduced so that by 2001 the airport was only operating on a care and maintenance basis.
- Better transport services need to be provided for youth groups such as to discos. Locals would also like the mobile cinema to visit more regularly.

Population

- Between 1981 and 2001, Unst has experienced a population decline in the order of 37%. The virtual closure of Unst Airport and the recent announcement of the closure of RAF Saxa Vord has had a major bearing on this population decline.
- It is estimated that the total population of Unst is currently around 700.
- Unst has an ageing and declining population and this places question marks over the viability and provision of services on the island.
- The proportion of residents aged between 18 and 29 on Unst is considerably lower than the Shetland average suggesting that the island finds it difficult to retain younger members of its population.

- School rolls across the island are generally declining, whilst the school in Haroldswick was recently closed.
- Pupils can only study at Baltasound High School to standard grade level. Pupils must then transfer to either Anderson High School or Brae for further education. Those who leave the island for higher education purposes often do not return because there are few suitable jobs to come back for.

Economy

- The main employment industries in Unst are public administration, social care and fishing. On the whole however there appears to be quite an even employment spread across a number of different industries.
- RAF Saxa Vord has seen a major decline in recent years, starting in 1999 when the Ministry of Defence announced that the RAF base would be scaled down. The number of people employed at the base has dropped from 250 to 92. Further reductions are now inevitable following the recent announcement that the base is to be closed.
- In 2005, the Unst Response Team (URT) was set up by Shetland Enterprise, on behalf of the economic development agencies in Shetland, to help the community of Unst tackle the economic impact of the closure of the Saxa Vord RAF base on the island. One of the key economic objectives of the URT will be to identify opportunities to diversify the economy of Unst using the skills that arise from the physical and human assets in the RAF base.
- Aquaculture is an important industry in Unst. Over 30 people are currently employed in three salmon farms, a hatchery and a pilot mussel farm. One farm in Baltasound has received organic status.
- The need to attract more young people to the island was a point emphasised at the recent Initiative at the Edge (IatE) meeting. A mixture of apprentice jobs in trades, professional jobs and student jobs are required on the island to retain and attract young people to Unst.
- A new pier has been built at Baltasound which offers a marina for local boats and a visitors berth. It is hoped that the new pier will allow for future economic development on the island through the expansion of fishing and aquaculture on Unst.
- The IatE conference identified the need to make better use of Baltasound pier, such as through encouraging cruise ships and yachts. It is believed that there could be potential for a tourist cruise trail throughout the North Isles.
- There is a need for other on-shore activities in order to attract tourists to Unst. It is believed that there is potential to make more of the fact that Unst is the most northerly island in the UK.
- The development of the pier at Uyeasound was viewed as 'essential' at the IatE meeting as there are current issues regarding safety.
- The costs of long distance commuting from Unst to the main employment centres in Shetland, which are Lerwick, and previously Sullom Voe, can act as a barrier to economic development. It is believed that a fixed link could allow Unst and Yell to share a larger labour pool and industrial infrastructure. This will be eased somewhat following the suspension of inter-isle ferry fares on Bluemull Sound.
- The IatE conference revealed a strong desire for the decentralisation of employment. The use of broadband can assist with the decentralisation of clerical and administration jobs.
- As a result of the economic decline, the Unst Partnership (UP) was established in 1999 to assist in the regeneration of the island.
- A number of successful projects have been progressed by UP to support economic regeneration on the island.
- There is support for renewable energy initiatives in Unst.

19. Walls and Sandness Fact Sheet

- The Walls and Sandness Community Council area covers half of the part of Shetland known as 'Wastside'. The Community Council also includes the islands of Papa Stour, Foula and Vaila (occupied by only one household).
- The area is largely crofting area, with large areas of open moorland and hundreds of freshwater lochs. Walls is the largest settlement in the area and acts as a small service centre to the largely scattered rural community.
- Sandness is a small crofting township overlooking St Magnus Bay and Papa Stour.

Transport

- There are a number of bus services in the area.
- There are 5 buses per day (Monday to Saturday) from Walls to Lerwick, except on Wednesday when there are 3. The first bus leaves Walls at 0700 and the last bus leaves Walls at 1805. The last from Lerwick leaves at 1705.
- In addition, there is a Sandness to Walls Feeder service bus and a Dale of Walls to Walls feeder service, both of which connect to the Walls to Lerwick bus.
- There is a Sandness & Walls Shopper Service to Lerwick, which operates every fourth Friday, departing Stendaleburn at 0930 and Lerwick 1330.
- There is also a West Burrafrith dial-a-ride service that operates from West Burrafrith Pier and Bixter but will only run if bookings are made.
- Other services in the west mainland are from Aith to Lerwick, and the associated Skeld-Bixter Feeder Service.
- The ferry service to Foula operates from Walls pier, whilst the ferry to and from Papa Stour operates from West Burrafrith.
- In 2004/2005, the Community Plan, detailed in the Shetland Local Plan, stated that the Council propose to construct a new footway with street lighting to link a number of community facilities and improve safety in Walls.

Population

- The population of Walls and Sandness has fluctuated over the years. In 1981, the population was 573. This slightly decreased to 554 in 1991, but by 2001 the population had increased to 601. Population decline is predicted however, and for the whole Walls and Sandness Community Council area (also including Papa Stour and Fair Isle) the population in 2011 is forecast at 573 people.
- Sheltered housing is available in Walls and Sandness.

Economy

- Crofting is the main industry in the Walls and Sandness area. However, crofting incomes have been in decline and croft diversification will be important to provide a sustainable future for the crofting industry.
- The Sandness Crofting and Development Association was set up in 1999 to try and ensure that the settlement remains an active crofting community into the 21st century. Projects undertaken by this group have included a coastal community walkway, and tree planting. There is also a longer term aspiration to develop a marine interpretation centre at Sandness Community Hall.
- Fishing activity is limited in the area, with only a few small inshore boats active in this sector.
- Aquaculture is becoming an increasingly important industry in the area. Walls is the principal centre for the aquaculture industry with a number of salmon farms located in the nearby voes. Mussel farming has also become more important in recent years.
- Sandness has Shetland's only wool spinning mill. This spinning mill employs a number of the local population. The mill contains a shop that sells knitwear products.
- It is believed that the area has significant potential to provide renewable energy due to the exposed coastline and open moorland.

- The Community Council statement, as outlined in the Shetland Local Plan, states that further business and industrial development that help to retain the local population and generate additional employment will be welcomed.
- Home-working and the use of new technology will also be encouraged given the significant distance of the area to the main employment centres in Shetland in Lerwick and Sullom Voe.
- Although the area's natural environment helps to attract day-trippers to the area, the lack of suitable accommodation, and wet weather facilities means that visitors do not stay long enough for the area to capture any significant benefits from tourism.
- Notable tourist developments that have been provided in recent years, or are in the process of being planned/developed, include the restoration of Voe House to provide accommodation for the Shetland Working Textile Museum, and the new Equestrian Centre at Mid Walls, which is the only indoor riding school in Shetland.

20. Whalsay Fact Sheet

- The island of Whalsay is located 5 miles to the east of Shetland Mainland and the island, known locally as “the bonny isle”, is 5 miles long and 2 miles wide.
- The main hub of activity on Whalsay concentrates around the busy harbour at Symbister on the western coast of the island, and although there is some crofting on the island, Whalsay’s economic development relies heavily on the fishing industry within which around a half of all jobs on the island are related.

Transport

- The Whalsay ferry service operates from Symbister Harbour in Whalsay to Laxo/Vidlin. The service is operated by the MV Linga and the MV Hendra.
- The Vidlin terminal is used as a diversionary port during periods of adverse weather. The use of Vidlin can be extensive during the winter months, following periods of strong south-easterly wind and swell.
- When the ferry is using Vidlin, it is noted that it can be difficult to maintain the timetable as it takes longer to travel to Vidlin compared to Laxo.
- There are 18 return crossings per day Monday to Saturday, and 14 return crossings on Sundays. The last return sailing of the day is undertaken on a booking only basis.
- The first ferry leaves Symbister at 0630 for Laxo and the first ferry in the opposite direction leaves Laxo at 0710.
- The last ferry from Symbister to Laxo leaves at 2235 if there is a booking, otherwise 2115. The last ferry in the opposite direction leaves at 2310 if there is a booking otherwise 2200.
- Ferry fares are £3 for an adult return (40p for children); £14 for an adult 10 return journey ticket (£2.40 for children); and £7 for cars up to 5.5m (and driver).
- An appraisal was undertaken earlier this year on the existing Symbister – Laxo ferry route. This appraisal involved an appraisal of options to secure the provision of the lifeline link between Whalsay and Shetland Mainland. Reasons for the appraisal were due to:
 - the requirement to plan for the replacement of existing ferries;
 - the requirement to undertake maintenance and renewal of existing terminals;
 - the need to consider increased vessel capacity on the existing route;
 - the need to alleviate the problems of harbour congestion; and
 - the requirement for a lifeline link that sustains the socio-economic future of Whalsay.
- Options appraised included replacement of terminals (both on Whalsay and the mainland), ferry replacement, and fixed links (bridges and tunnels). A new facility at North Voe and a new facility at Symbister to relieve congestion at the existing harbour in Symbister were also considered within the appraisal.
- It is thought that some commuters living in Whalsay own two cars and leave one on Shetland Mainland during the working week for commuting purposes. There is also a large amount of car sharing.
- The main road from the Laxo terminal (B9071) is believed to be good. The route from Laxo to Vidlin is also taken via the B9071, although this stretch of road is said to be of poorer condition. This is a single carriageway road and there are few passing places, which raises concerns when ferries are diverted to Vidlin. On such occasions, it has been said that conflicts can occur between vehicles attempting to catch a ferry departure from Vidlin, and those vehicles recently disembarked at Vidlin.
- There is a bus service that collects passengers from the Laxo terminal twice a day during the AM and PM commuter periods. The earliest bus departs Laxo at 08:20. The second service departs Lerwick at 17:05. This service also stops at Vidlin and will wait on ferry users when the Whalsay ferries have been forced to divert to Vidlin. Fares from Lerwick to Laxo/Vidlin are £2.20.
- Whilst there is a gravel air strip on the island, this does not accommodate any scheduled services. However, it is frequently used to transport key service personnel to and from Out Skerries.

- 2001 travel to work trends reveal a high commuting rate to Shetland mainland, where 22% of Whalsay's population work (66% are island based, and 12% have no fixed location of work).
- Car ownership has increased on Whalsay between 1991 and 2001. In 1991, 20% of households had no cars or vans available, whilst in 2001 this had decreased to 16%. There has also been an increase in households with two or more cars or vans available, from 32% in 1991 to 40% in 2001.

Population

- Whalsay has benefited from a relatively stable population between the last three censuses, of 1,031 in 1981, 1,041 in 1991 and 1,034 in 2001.
- Analysis of the age structure of Whalsay reveals that the proportion of Whalsay's population aged between 0 and 20 years old is actually higher than the Shetland and Scottish average. However, trends appear to suggest that Whalsay has difficulty retaining younger members of the community. For example, in 1991 there were 84 Whalsay residents aged between 20 and 24 (8% of Whalsay's total population) but by 2001, this figure had decreased to 51 (5% of Whalsay's total residents), which could suggest a lack of higher education or career opportunities in Whalsay.
- The number of pupils attending secondary school in Whalsay has increased over the years from a total school roll of 36 in 1971 to a school roll of 68 in 2002. In terms of the number of primary school children attending Symbister House Junior High School, "Shetland in Statistics" suggests that this figure has generally decreased over the years. However, the number of nursery pupils attending Symbister House has steadily increased.

Employment

- Many jobs on Whalsay are either directly or indirectly connected to the fishing industry, which is divided into three sectors: white fish, pelagic fish and shell fish.
- Employment rates on Whalsay, both for males and females have significantly increased over this period. For instance, the percentage of males aged between 16 to retirement age in employment has increased from 77% in 1991 to 83% in 2001. Female employment has also grown from 59% in 1991 to 72% in 2001.
- There is only a limited amount of agricultural and crofting activity on the island and the remainder of the working population are based in the public sector and service sector. Many jobs are taken on Shetland Mainland, enabled by the current ferry service.
- Ferry staff account for 43 full time jobs on the island. This accounts for seven crew, split between the two Whalsay ferries, and the Out Skerries ferry. An additional employee mans the Whalsay booking office.
- Four shell fish vessels are based in Whalsay, based on inshore waters. Typically, these fish for scallops, velvet crabs and prawns.
- Aquaculture is a growing industry in the island. There is a fish farm located to the west of North Voe operated by Johnson Seafarms. Whilst currently farming salmon, the company is due to diversify into the farming of organic cod.
- Fish processing is also a major industry in Whalsay. Whalsay Fish is currently 100% owned by Shetland Leasing and Property, and supported by the Council. The workforce comprises of 65 employees.
- A good range of community facilities are provided on Whalsay.

21. Yell Fact Sheet

- The North Isles is a group of three islands to the north east of Shetland Mainland: Yell, Unst and Fetlar. They are connected to each other through a triangular ferry service route on Bluemull Sound and are connected to Shetland Mainland by a ferry service across Yell Sound.
- Yell is the second largest island in Shetland at 17 miles long and 7 miles wide. Mid Yell, located in the centre of the island, is the largest village on Yell, while North Yell (Cullivoe) and South Yell (Burravoe) are other main settlements.

Transport

- Ferries run from Ulsta to Shetland Mainland (Toft) and from Gutcher to Unst and Fetlar on a daily basis.
- Two new ferries operate between the Mainland and Yell, the MV Daggri and MV Dagalien.
- At the Initiative at the Edge (IatE) event in August 2005 many residents called for the abolition of ferry fares. The inclusion of ferry fares within road tax costs was also recommended.
- The SIC has approved the abolishment of all fares on Bluemull Sound and the night supplement on Yell Sound from September 2005 until March 2008.
- A more frequent ferry service at the weekend would be welcomed.
- The IatE meeting revealed a strong aspiration for fixed links (both across the Bluemull and Yell Sound). However, some residents believe that a fixed link could lead to many islanders in the North Isles losing their jobs, and some others dislike this idea as Yell would no longer be an island.
- The IatE event also revealed that better information and signage is required on the ferries, particularly for the disabled.
- Ferry timetables can be difficult to read. There is a need for better advertising of the bus and ferry timetables in easily accessible locations.
- A bus shelter or a waiting room would be welcomed at the Ulsta ferry terminal.
- An integrated bus/ferry service operates to and from Lerwick from Yell. A single ticket from Gutcher to Lerwick is £3.50. This service departs Gutcher at 0830 and links with the 0910 Ulsta to Toft ferry before arriving in Lerwick at 1010. Between April and September only, there is an afternoon service that departs Gutcher at 1655 and arrives in Lerwick at 1830.
- The first service from Lerwick departs Lerwick at 0755 and arrives in Gutcher at 0953. The last service departs Lerwick at 1710 and arrives in Cullivoe at 1850.
- Within Yell, there is a dial-a-ride service that operates round the east side of the island.
- It is believed that the dial-a-ride service on the island is working well.
- Additional services include the Yell-Cullivoe-Ulsta service, which operates during the school term only, and the Yell-West Sandwick-Mid Yell-Ulsta service. The service departs West Sandwick at 0820 and arrives in Ulsta at 0908.
- Many residents on Yell believe that the public bus service in Yell has improved in recent years.
- It is believed that the cost of travel to Shetland puts off tourists, and has a negative effect on the north isles because it is felt that the further you go in Shetland, the more you pay.
- Many residents would like to see cheaper air fares to Shetland. There is no airstrip in Yell.
- Car ownership on Yell has significantly increased between 1991 and 2001. In 1991, almost 27% of residents on the island did not own a car, but in 2001 this figure dropped to approximately 20%. Similarly, the number of people with 2 or more cars has increased considerably from 29% in 1991 to nearly 38% in 2001.
- Roads are generally deemed to be good, especially the main roads, although it is felt that the Cullivoe road needs widening to cope with the level of HGV traffic using the road.

Population

- Yell has experienced considerable population decline of 20% during the twenty years between the 1981 and 2001 census. The population currently stands at around 945.
- Yell generally has an ageing society. The proportion of the population over 45 on Yell is higher than the Shetland Islands and national averages. Meanwhile, the proportion of Yell's

population aged between 0 and 29 is below both the Shetland Islands and Scottish averages.

- School rolls across the island are generally declining. Pupils can only complete up to standard grade level at Mid Yell High School and must transfer to either Anderson High School or Brae for further education.

Economy

- The main industries in Yell are transport, storage and communications, health and social work and manufacturing. The fishing and agricultural industries are also important to Yell's economy
- The aquaculture industry is becoming increasingly important in Yell. A number of mussel farms have been developed and there is potential for further diversification into scallops, cod and halibut.
- An extension to Cullivoe Pier was opened in 2001 at a cost of £2.6 million to assist in the development of the aquaculture industry.
- There is also an aspiration for a bigger pier, breakwater and landing area with crane at Mid Yell. It is believed that it is overcrowded and dangerous at present.
- The latE conference also raised issues relating to the provision of a slipway at Uyeasound to provide a boat maintenance facility.
- There is some daily ferry commuting by Yell residents for employment at Sullom Voe and Brae. The decline of the oil industry at Sullom Voe will thus have a detrimental impact on Yell.
- There has been a recent decline in crofting which has led to islanders diversifying into other activities including soft fruit production and crafts.
- Yell has the largest deposits of peat in Shetland and as a result there is a limited amount of commercial peat extraction on the island.
- There is a strong desire to encourage youths to stay on the island but there are limited employment opportunities for youths on Yell. Those who leave the island for higher education purposes often do not return because there are no relevant jobs to come back for.
- There is a need to investigate ways of encouraging more youths to enter into trades.
- A video-conferencing facility was opened on the island, and it is hoped that new technology can help to increase levels of home-working or satellite working. At present, the lack of broadband network acts as a barrier to this.
- Residents at the latE event stressed that there is potential to develop economic activity on this island through tourism. At present, those visitors who do spend time on the island do not stay long enough to seriously boost the local economy.
- The latE conference highlighted the potential for yacht tourism in the area, although this would need to be supported by improved infrastructure and marketing.
- Further accommodation, eateries and activities for tourists would also be required to capture the benefits of tourism in Yell. Traditional industries such as crofting could tap into the desires of tourists to see "how things used to be done".
- There is a desire for greater decentralisation of jobs away from Lerwick. The Sellafirth Units have been highlighted as a key site for new jobs. It is also believed that these units could be used as commuter centres – perhaps as hot-desking spaces that would allow locals to work part of their week on the island by using information technologies (IT) to communicate to the Mainland.
- There is good access to health on Yell, although it is believed video-conferencing could be better used to save people from having to travel all the way to Shetland Mainland for health appointments. Video-conferencing reduces the need to travel, and thus has environmental benefits.
- Video-conferencing could also assist in the delivery of more adult education classes to Yell residents, as requested at the recent latE event.
- At the latE meeting, it was established that there is general support for the development of renewable energy initiatives on the islands.

Appendix C: Scottish Index of Multiple Deprivation Analysis

Scottish Index of Multiple Deprivation

In order to examine potential problems of social exclusion in Shetland, results from the Scottish Index of Multiple Deprivation (SIMD) 2004 have been considered. SIMD 2004 identifies the most deprived areas across Scotland based on 31 indicators in the six individual domains of Current Income, Employment, Housing, Health, Education, Skills and Training, and Geographic Access to Services and Telecommunications. In order to investigate transport and social inclusion, the most useful indicator is Geographic Access to Services and Telecommunications.

SIMD 2004 is presented at data zone level, enabling small pockets of deprivation to be identified. The data zones are ranked from most deprived (1) to least deprived (6505) on the overall SIMD 2004 and on each of the individual domains. The result is a comprehensive picture of relative area deprivation across Scotland. Tables C1 to C5 present the SIMD results for Shetland's wards.

Overall, of all the Local Authorities in Scotland, Shetland was 4th least deprived (behind East Dunbartonshire, East Renfrewshire and Aberdeenshire) emphasising the relatively high standards of living on the island. However, this masks out considerable hardship experienced by many.

Access to Services

Geographic Access and Telecommunications Deprivation is one indicator studied in the Scottish Index of Multiple Deprivation and can be used to assess or review accessibility in Shetland. Within this broad indicator of deprivation, numerous factors are analysed including drive time to GP, drive time to supermarket, drive time to petrol station, drive time to primary school, and drive time to post office.

The results from the analysis are presented in Table C.1.

Table C.1: SIMD – Ranking of Wards by Geographic Access to Services and Telecommunications Indicators.

Ward Name	SIMD, rank of access domain (out of 1222 wards)
"Northmavine, Muckle Roe And Busta Ward"	5
Whalsay/Skerries Ward	11
Yell Ward	15
Delting East And Lunnasting Ward	21
"Sandsting, Aithsting And Weisdale Ward"	25
Unst And Island Of Fetlar Ward	31
"Nesting, Whiteness, Grlsta And Gott Ward"	32
"Walls, Sandness And Clousta Ward"	35
Dunrossness Ward	49
"Sandwick, Levenwick And Bigton Ward"	52
Delting West Ward	54
Cunningsburgh And Sandwick Ward	68
Burra/Trondra Ward	164
"Upper Sound, Gulberwick And Quarff Ward"	247
North Ward	398
Harbour And Bressay Ward	579
Sound Ward	610
Scalloway Ward	825
Clickimin Ward	982
Breiwick Ward	1040
South Central Ward	1169
North Central Ward	1199

Source: SIMD 2004

The results based on the Geographic Access and Telecommunications Deprivation indicators reveal that Northmavine is the 5th most deprived area (datazone) in the whole of Scotland. Other island communities and areas in the north mainland and south mainland are also close to the top of the list of the most deprived areas in Scotland. Reasons as to why these zones are ranked amongst the most deprived in Scotland are because many of the services upon which the assessment is founded are centralised in Lerwick such as hospitals and supermarkets. Many of these zones also have low population sizes which make it unfeasible to sustain petrol stations or post-offices and hence these services tend to be located further away in larger settlements.

In contrast, zones within Lerwick are amongst the least deprived locations in Scotland. It is believed that this is due to the high level of services, such as hospitals, which have been centralised in Lerwick.

Education Deprivation

The Scottish Index of Multiple Deprivation also assesses deprivation in terms of Education, Skills and Training Deprivation. This is based on pupil's performance at SQA at Stage 4, pupils aged 16+ who are not in full time education, proportions of the 17+ population who have not successfully applied to higher education, working age adults with no qualifications, and secondary level absences. The results from the analysis are presented in Table C.2

Table C.2: SIMD – Ranking of Wards by Education, Skills and Training Indicators.

Ward name	SIMD, rank of education domain (out of 1222 wards)
North Central Ward	435
Clickimin Ward	536
Whalsay/Skerries Ward	631
Delting East And Lunnasting Ward	685
Breivick Ward	689
Harbour And Bressay Ward	761
North Ward	764
"Nesting, Whiteness, Grista And Gott Ward"	809
South Central Ward	844
Cunningsburgh And Sandwick Ward	849
Dunrossness Ward	883
"Walls, Sandness And Clousta Ward"	906
Yell Ward	909
"Upper Sound, Gulberwick And Quarff Ward"	923
Delting West Ward	931
"Northmavine, Muckle Roe And Busta Ward"	943
Unst And Island Of Fetlar Ward	946
Scalloway Ward	1006
Sound Ward	1015
"Sandsting, Aithsting And Weisdale Ward"	1055
Burra/Trondra Ward	1112

Source: SIMD 2004

In short, Shetland as a whole scores relatively well. It is believed that the relatively high proportion of teachers to pupils in Shetland is a major explanation for this. For example, according to the Scottish Executive's Teachers in Scotland 2005 Report, in terms of all school pupils Shetland had the lowest ratio of pupils to staff in Scotland, with a figure of 9.4:1 against a national average of 14.1:1. When centrally employed staff are added to the equation the Shetland ratio falls to 8.7 against a national average of 13.7.

Health Deprivation

The Scottish Index of Multiple Deprivation assesses health deprivation according to the comparative mortality factor, hospital episodes related to alcohol and drug use, comparative illness factor, emergency admissions to hospital, proportion of population being prescribed drugs for anxiety or depression or psychosis, and population of live singleton births of low birth weight.

The results from the analysis are presented in Table C.3.

Table C.3: SIMD – Ranking of Wards by Health Indicators.

Ward name	SIMD, rank of health domain (out of 1222 wards)
North Ward	588
"Northmavine, Muckle Roe And Busta Ward"	841
South Central Ward	867
Harbour And Bressay Ward	882
North Central Ward	889
Sound Ward	905
Breiwick Ward	906
Delting West Ward	914
Delting East And Lunnasting Ward	937
Clickimin Ward	941
Dunrossness Ward	943
Burra/Trondra Ward	950
Cunningburgh And Sandwick Ward	1021
Scalloway Ward	1032
"Nesting, Whiteness, Girsta And Gott Ward"	1037
"Walls, Sandness And Clousta Ward"	1046
Yell Ward	1047
"Sandwick, Levenwick And Bigton Ward"	1076
"Sandsting, Aithsting And Weisdale Ward"	1085
Unst And Island Of Fetlar Ward	1094
"Upper Sound, Gulberwick And Quarff Ward"	1135
Whalsay/Skerries Ward	1189

Source: SIMD 2004

It is interesting that island areas are less deprived in terms of health whereas those more built up data zones such as North Ward appear to be more deprived. However, on the whole, Shetland's overall rating for health is relatively good in the broader Scottish context.

Employment Deprivation

The Scottish Index of Multiple Deprivation also assesses deprivation in terms of Employment Deprivation. This is measured by unemployment claimant count averaged over 12 months, incapacity benefits recipients, severe disablement allowance receipts, and compulsory New Deal recipients.

The results from the analysis are presented in Table C.4

Table C.4: SIMD – Ranking of Wards by Employment Indicators.

Ward name	SIMD, rank of employment domain (out of 1222 wards)
North Ward	543
"Northmavine, Muckle Roe And Busta Ward"	769
Delting East And Lunnasting Ward	800
South Central Ward	836
North Central Ward	844
Yell Ward	891
Unst And Island Of Fetlar Ward	892
Breivick Ward	947
Clickimin Ward	968
Harbour And Bressay Ward	973
Scalloway Ward	982
Cunningsburgh And Sandwick Ward	993
Dunrossness Ward	1031
"Walls, Sandness And Clousta Ward"	1055
"Sandsting, Aithsting And Weisdale Ward"	1085
"Sandwick, Levenwick And Bigton Ward"	1122
Delting West Ward	1147
Sound Ward	1189
Burra/Trondra Ward	1194
"Nesting, Whiteness, Girsta And Gott Ward"	1207
"Upper Sound, Gulberwick And Quarff Ward"	1211
Whalsay/Skerries Ward	1219

Source: SIMD 2004

The results from the employment review are very strongly aligned with the results from the health deprivation results, with North Ward and Northmavine the two most deprived areas in Shetland based on the employment deprivation indicators. However, on the whole, Shetland scores favourably in this rating compared to other Local Authorities in Scotland. For example, Shetland is the least deprived authority out of the 32 Local Authorities in Scotland with regards to employment deprivation.

Income Deprivation

Income deprivation, which is measured by eight different indicators, can also be used to give an insight into the problems that the LTS should seek to resolve through transport strategies. These indicators include adults and children in income support households, adults and children in income based job seekers allowance households, adults and children in working families' tax credit households below a low income threshold, and adults and children in disability tax credit households below a low income threshold.

The results from the analysis are presented in Table C.5.

Table C.5: SIMD – Ranking of Wards by Income Indicators.

Ward name	SIMD, rank of income domain (out of 1222 wards)
"Northmavine, Muckle Roe And Busta Ward"	577
Whalsay/Skerries Ward	581
Yell Ward	639
Delting East And Lunnasting Ward	654
"Sandsting, Aithsting And Weisdale Ward"	700
Unst And Island Of Fetlar Ward	710
"Nesting, Whiteness, Grlsta And Gott Ward"	800
"Walls, Sandness And Clousta Ward"	838
Dunrossness Ward	881
"Sandwick, Levenwick And Bigton Ward"	910
Delting West Ward	945
Cunningsburgh And Sandwick Ward	957
Burra/Trondra Ward	979
"Upper Sound, Gulberwick And Quarff Ward"	982
North Ward	1031
Harbour And Bressay Ward	1073
Sound Ward	1106
Scalloway Ward	1110
Clickimin Ward	1120
Breiwick Ward	1125
South Central Ward	1134
North Central Ward	1213

Source: SIMD 2004

On the whole, Shetland is ranked as the fourth least income deprived authority in Scotland. However, analysis at ward level suggests that, once again, Northmavine, and other areas in the north of Shetland are more income deprived than those areas closer to the centre of Shetland.