Shetland Inter-Island Transport Connectivity Programme

Draft Interim Island Communities Impact Assessment Report

Stantec

Prepared for:
Shetland Islands Council

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Date:
June 2026

Project/File:
330910078

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Revision	Description	Author	Date	Quality Check	Date	Independent Review	Date
V1.0	Draft	JK/KM	June 2026	KM	June 2026	CGT	June 2026
V2.0	Client Comments	JK/KM	June 2026	KM	June 2026	CGT	June 2026
V3.0	Final	JK/KM	June 2026	KM	June 2026	CGT	June 2026

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Executive Summary

This interim Island Communities Impact Assessment has been prepared to inform development of the Shetland Inter-Island Transport Connectivity Programme Network Strategy. It provides an early, programme-level assessment of how alternative connectivity options across Shetland's ferry-served islands may affect island communities, with a focus on identifying likely differential and disproportionate impacts that should shape option refinement, mitigation and sequencing ahead of a final ICIA.

The assessment considers impacts across four themes:

- **Demographic impacts:** population retention, inward migration potential, young people's ability to remain, and ageing-related access needs;
- **Economic impacts:** the cost and practicality of doing business, supply chain resilience, labour market access and investment confidence;
- **Social wellbeing and access to services:** access to healthcare, education, childcare, social care and essential retail, including the stress and cost burden associated with disruption and travel constraints; and
- **Community resilience and quality of life:** long-term sustainability, social cohesion, participation in community life, and the day-to-day liveability of island living.

Overall, the interim findings indicate that Business as Usual options typically maintain existing barriers linked to timetabled dependency, capacity and booking constraints, timetable gaps and disruption sensitivity. Ferry Do Something options generally provide positive improvements by addressing the most immediate operational constraints, improving reliability and usability, and in some cases tackling structural issues such as non-sailing days. Where Ferry Do Max options apply, they tend to deliver the strongest ferry-based benefits through increased flexibility and reduced competition for space, although the scale of additional uplift varies by route and is sensitive to deliverability. Fixed link options can be transformative by removing ferry dependency and providing continuous access, but their benefits are most sensitive to toll affordability and inclusive provision for non-car users.

The interim assessment also identifies a key programme-level risk: unequal outcomes between islands if step-change improvements are delivered for some communities while others continue to face persistent structural barriers. Managing these distributional effects through fares and toll policy, inclusive access standards, and careful sequencing is central to ensuring the emerging network strategy supports fair and sustainable outcomes for all island communities.

Glossary

Term	Definition
Interim Impact Assessments	A comprehensive suite of interim impact assessments has been prepared to support SIC in meeting their statutory duties and to consider the implications of the IITCP Network Strategy in accordance with relevant legislation.
Island Communities Impact Assessment (ICIA) Duty	Refers to the requirement of certain public bodies to carry out an Island Communities Impact Assessment (ICIA) under the Islands (Scotland) Act 2018.
Seakeeping	The ability of a vessel to operate safely and comfortably in rough sea conditions. A vessel with good seakeeping characteristics is better able to maintain its course and speed in heavy weather, reducing the risk of service cancellations.
Short-shipped	A term used to describe goods or cargo that have been presented for transport but could not be carried on the intended sailing, typically due to insufficient deck capacity.
Scottish Transport Appraisal Guidance (STAG)	The Scottish Government's guidance framework for appraising transport projects and interventions. It sets out the process for identifying transport problems, developing options and assessing them against a range of criteria including environment, economy, safety, equality and accessibility.
Transport Planning Objective	A specific, measurable objective set at the outset of a transport appraisal that defines what the investment is seeking to achieve. Options are appraised against the TPOs to determine how well they address the identified transport problems.

List of Acronyms

Acronym	Definition
ICIA	Island Communities Impact Assessment
IITCP	Inter-Island Connectivity Programme
NHS	National Health Service
OBC	Outline Business Case
SIC	Shetland Islands Council
SIMD	Scottish Index of Multiple Deprivation
SOC	Strategic Outline Case
STAG	Scottish Transport Appraisal Guidance
TPO	Transport Planning Objective

1 Introduction

1.1 Background

1.1.1 This interim Island Communities Impact Assessment (ICIA) report has been prepared by Stantec UK on behalf of Shetland Islands Council (SIC) in support of the Shetland Inter-Island Connectivity Programme (IITCP) Network Strategy Outline Business Case (OBC). The purpose of the Shetland IITCP is to develop a high-level timed and costed sequence of island connectivity investments which, taken together, will form an agreed network strategy to meet the needs of Shetland's island communities.

1.1.2 The report fulfils statutory duties under the Islands (Scotland) Act (2018) and forms part of a wider suite of impact assessments that will inform future decision making as the programme progresses.

1.1.3 This report is intended to be read alongside the Network Strategy OBC. It does not restate the full strategic case, option development process or economic appraisal, which are set out in detail in the OBC. Instead, it focuses on the implications of the Shetland IITCP for people and communities and on how potential impacts have been considered at a programme level.

1.2 Shetland IITCP Programme Context

1.2.1 The Shetland IITCP is a long term programme of work to develop a timed and costed sequence of interventions to improve transport connectivity between Shetland's island communities. The programme covers eight ferry-served islands: Bressay, Fetlar, Foula, Papa Stour, Skerries, Unst, Whalsay and Yell. The geographic scope of Shetland IITCP is shown below in **Figure 1.1**.

1.2.2 The Shetland IITCP has been established by SIC to consider long term solutions for sustaining and improving transport links across Shetland's islands. The programme responds to a range of strategic challenges, including ageing assets, operational resilience, accessibility, affordability, workforce sustainability and the need to support inclusive economic and social outcomes for island communities. A range of option typologies is being considered, including enhanced ferry-based solutions and fixed link options, depending on route characteristics and future demand.

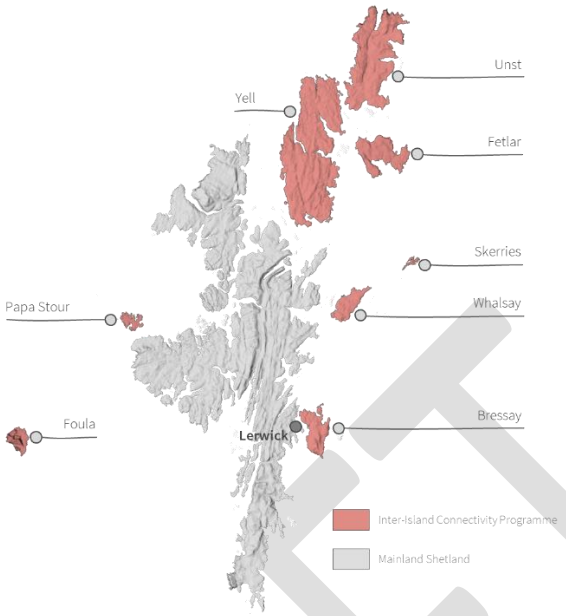

Figure 1.1: Geographic scope of the Shetland Inter-Island Transport Connectivity Programme

1.2.3 The study area for the Shetland IITCP includes eight island communities currently connected to Shetland mainland via ferry services operated by SIC. These include: Bressay, Fetlar, Foula, Papa Stour, Skerries, Unst, Whalsay and Yell.

1.2.4 It is important to highlight that there are two strands to the IITCP study and option generation and refinement process:

- **Candidate fixed link islands[1] (Bressay, Unst (plus Fetlar, as an integral element of Bluemull Sound), Whalsay and Yell):** For these five islands, the options increment up from the present-day position to a 'Ferry Do Max' option, which is effectively a ferry comparator to a fixed link. The responses to the resident survey for these islands were of a sufficient number to highlight the key areas of dissatisfaction with the service. When combined with other secondary data, it was possible to develop detailed option packages for consideration that incrementally address the problems expressed by communities.

- **Foula, Papa Stour and Skerries:** For these smaller and more geographically remote islands, the option generation was focused on asset replacement and increments to the current ferry service. The option packages were defined through interviews with each community, supplemented by other secondary data.

1.2.5 An overview of the options for each island is provided below in **Figure 1.2**.

[1] It should be noted that a fixed link to Fetlar was considered and discounted from further consideration in the Strategic Outline Case.

	Business as Usual	Ferry 'Do Something'	Ferry 'Do Maximum'	Fixed Link
Bressay	✓	✓	✓	✓
Yell	✓	✓	✓	✓
Unst	✗	✓	✓	✓
Whalsay	✓	✓	✓	✓
Fetlar	✗	✓	✓	✗
Foula	✓	✓	—	—
Papa Stour	✓	✓	—	—
Skerries	✓	✓	—	—

Figure 1.2: Option Packaging for Each Island

1.3 Interim Impact Assessment Overview

1.3.1 A comprehensive suite of interim impact assessments has been prepared to support SIC in meeting their statutory duties and to consider the implications of the IITCP Network Strategy in accordance with relevant legislation. A screening exercise was undertaken which confirmed that that the following statutory impact assessments are to be prepared in respect of the IITCP Network Strategy:

- Equality Impact Assessment
- Fairer Scotland Duty Impact Assessment
- Island Communities Impact Assessment
- Children's Rights and Wellbeing Impact Assessment
- Climate Change Impact Assessment

1.3.2 The Integrated Equality Impact Assessment and Fairer Scotland Duty report also provides consideration to the Consumer Duty under the Consumer Scotland Act 2020 and the Armed Forces Covenant.

1.3.3 The screening exercise also recommended the preparation of a non-statutory Health Impact Assessment to understand the implications of the preferred options on key health and wellbeing considerations across Shetland and the communities directly affected by the IITCP routes.

1.3.4 The Shetland IITCP has been established by SIC to consider long term solutions for sustaining and improving transport links across Shetland's islands. The existing inter-island transport system is essential to daily life and underpins access to services, community wellbeing and the functioning of sectors of national importance. However, ageing

infrastructure, increasing operational pressures and rising expectations around resilience, accessibility and decarbonisation mean that the current network faces challenges that will intensify over time.

1.4 Purpose of the Interim ICIA

1.4.1 This interim assessment forms part of a wider suite of impact assessments that have informed the development of the **IITCP Network Strategy - Outline Business Case** and specification of an overall preferred network option. The impact assessment process has sought to ensure that decisions about future connectivity consider the wellbeing, rights and interests of different population and community groups; reflect Shetland's unique island context; and contribute to the development of fair, inclusive and sustainable outcomes.

1.4.2 This is an interim assessment; option definitions, costs and operational assumptions may vary in maturity across routes. The purpose is to identify likely differential and disproportionate impacts early so that options can be refined, mitigations can be designed in, and evidence needs can be targeted. A final ICIA report will be prepared once route-level preferred options and the overall preferred network option and sequencing are confirmed.

1.5 Role of the ICIA within the Business Case Process

1.5.1 This report supports the OBC by providing structured evidence on island communities impacts at a programme level. It complements the strategic, economic and financial analysis presented in the OBC and helps demonstrate that due regard has been given to statutory duties in the development of the network strategy.

1.5.2 The assessment has been undertaken in parallel with option development. Findings have helped to inform the identification of option strengths, risks and mitigation measures.

Scope and Coverage

1.5.3 The scope of this report includes:

- Programme level assessment of potential impacts arising from different option typologies.
- Consideration of impacts on island communities, fulfilling statutory duties under the Islands (Scotland) Act (2018).

1.5.4 Detailed option appraisal, route specific design assumptions and cost information are provided in the OBC and are not repeated here.

2 ICIA Assessment Approach

2.1 Legislative Duty

2.1.1 Public authorities in Scotland are required to undertake a range of impact assessments to ensure that strategic proposals take account of societal needs and rights , and that they advance positive and fair outcomes. This interim impact assessment report considers the following statutory duty:

- Duties under the Islands (Scotland) Act (2018), These place a requirement on relevant public bodies to have regard to the unique circumstances of island communities in the exercise of their functions. This includes the preparation of Island Communities Impact Assessments (ICIAs) where a policy, strategy or service is likely to have differential impacts on island areas, thereby ensuring that island-proofing considerations are embedded proportionately within decision-making processes.

2.1.2 The assessment has been informed by SIC policies and guidance alongside Scottish Government guidance.

2.2 Assessment Approach

2.2.1 The Islands (Scotland) Act 2018 places a duty on relevant public bodies to prepare and ICIA in relation to a policy, strategy or service which in its opinion is likely to have an effect on an island community which is significantly different from its effect on other communities. Section 8(3) of the 2018 Act states that an island communities impact assessment must – (a) describe the likely significant different effect of the policy, strategy or service and (b) assess the extent to which the authority considers that the policy, strategy or service can be developed or delivered in such a manner as to improve or mitigate, for island communities, the outcomes resulting from it.

2.2.2 Where differential effects are likely, the duty requires consideration of how these impacts can be addressed. This can be through mitigation and enhancement measures, and through proportionate engagement.

2.2.3 In the context of the IITCP, the ICIA is intended to ensure that decisions on future inter-island connectivity are informed by an understanding of:

- The specific circumstances of Shetland's island communities;
- The ways in which transport options may affect island wellbeing, sustainability and equality of opportunity;
- Whether any options could create differential or disproportionate outcomes between islands, or within island communities; and
- Practical measures that can be built into option refinement and sequencing to reduce disadvantages and strengthen positive outcomes.

2.2.4 This is an interim ICIA. It is intended to provide early identification of likely impacts so that options can be refined and evidence needs can be targeted ahead of a final ICIA once route-level preferred options and network sequencing are confirmed.

2.2.5 The interim ICIA has been undertaken as a proportionate, programme-level assessment, structured around the option typologies considered in the IITCP and the island geographies affected. The approach comprises:

- Screening and scoping, to confirm that an ICIA is required and to define the geographic and thematic scope of assessment.
- Baseline review, drawing together key demographic, social, economic and service-access characteristics relevant to island outcomes and vulnerability.
- Option assessment, considering how each option may change access, reliability, affordability and resilience, and how these changes may influence island sustainability.
- Distributional analysis, identifying where benefits and burdens may fall unevenly between islands, and between different groups within an island community (for example, frequent travellers, households on lower incomes, and those without access to a car).
- Interim scoring, using a consistent assessment matrix to summarise the likely direction and relative scale of impacts across the ICIA themes and support comparative interpretation across routes.
- Mitigation and enhancement, identifying early actions that can be designed into options or sequencing to avoid widening inequalities and to strengthen island outcomes.

2.3 Assessment Scope

2.3.1 The ICIA narrative is organised around four thematic areas that reflect the most material pathways through which connectivity options may affect island communities:

- Demographic impacts;
- Economic impacts;
- Social wellbeing and access to services; and
- Community resilience and quality of life.

2.3.2 At the scoping stage, guide framing questions were developed to help inform the interim impact assessment process, these are presented below for the ICIA.

Guide Framing Questions

2.3.3 The below guide framing questions have been developed to understand the potential equality implications of different options proposed as part of the Shetland IITCP, the guide framing questions will form the basis of the interim impact assessments:

2.3.4 1. Demographic impacts

- How might each transport option influence population retention, inward migration, the ability of young people to remain on islands or the support needs of older populations.
- Could any option help address demographic imbalance by improving access to education, employment or services.
- Are any islands likely to experience disproportionate demographic impacts based on their size, population trends or service dependencies.

2. Economic impacts

- How would different options affect the viability of key industries, the stability of supply chains and the ability of businesses to operate effectively across islands.
- Would any option reduce or increase costs to businesses, including costs related to transport reliability, freight, workforce mobility or seasonality.
- How might options support or constrain local employment, apprenticeship opportunities or the ability of people to access work on the Shetland mainland.
- Are there route-specific or island-specific vulnerabilities that could lead to unequal economic outcomes depending on the option selected.

3. Social wellbeing and access to services

- For each island, how would options affect access to health care, education, childcare, social care and essential retail, particularly where such services are only available on the Shetland mainland.
- Would some options improve the resilience of access to critical services during periods of disruption and would this disproportionately benefit certain island communities.
- Could any option increase or reduce cost-of-living pressures for island households by influencing travel costs, time burden or reliance on private transport.
- How might options affect the sustainability of local services on smaller islands or the reliance on informal care networks.

4. Community resilience and quality of life

- How might options support or undermine the long-term sustainability of island communities experiencing demographic decline or limited economic diversity.
- Could changes in transport connectivity strengthen or weaken social cohesion, participation in community life or the ability of residents to maintain social ties.
- Are there islands where options may introduce significantly different impacts due to geographic distance, current service level or dependency on multi-leg journeys.

5. Distribution of impacts across islands

- Do any options risk creating unequal outcomes between different island communities by improving opportunities for some while leaving persistent barriers for others.
- How might cumulative impacts across islands reflect differing baseline conditions, capacity constraints or existing socio-economic vulnerabilities.

2.4 Assessment Framework and Criteria

2.4.1 The assessment will consider each of the options and their potential impact on different island geographies.

2.4.2 The following matrix, as shown in Table 2.1, will be used to assess the scale of any potential impact linked to each impact assessment. The assessment criteria provide an objective means of undertaking and reporting the assessments to help inform decision making.

Commentary will be provided on any identified impacts within the main assessment. The colour coding also allows for rapid identification of the impacts most likely to be significant, generally those assessed as having a major positive or negative effect. Where any major negative impacts are identified mitigations and recommendations are provided.

2.4.3 Table 2.1: Assessment Criteria Matrix

Impact Score	Description	Symbol
Major Beneficial Effect	The objective or policy contributes significantly to the requirements of the Island Communities Duty, particularly to advancing equality of opportunity and meeting the needs of people experiencing economic, geographical or social disadvantage.	++
Minor Beneficial Effect	The objective or policy contributes significantly to the requirements of the Island Communities Duty, particularly to advancing equality of opportunity and meeting the needs of people experiencing economic, geographical or social disadvantage, but not significantly	+
Neutral / Negligible Effect	The objective or policy has a neutral effect on the requirements of the Island Communities Duty, or the relationship is negligible	0
Minor Adverse Effect	The objective or policy adversely affects the requirements of the Island Communities Duty, particularly with respect to advancing equality of opportunity and meeting the needs of people experiencing economic, geographical or social disadvantage	-
Major Adverse Effect	The objective or policy significantly adversely affects the requirements of the Island Communities Duty particularly with respect to advancing equality of opportunity and meeting the needs of people experiencing economic, geographical or social disadvantage	- -
Uncertain Effect	The objective or policy has an uncertain relationship to the Island Communities Duty requirements or insufficient detail, or information may be available to enable an assessment to be made.	?
No Clear Relationship	There is no clear relationship between the objective or policy and the achievement of the Island Communities Duty.	~

3 Governance, Participation and Evidence

3.1 Governance and Oversight

3.1.1 The impact assessment process has been overseen through the programme governance arrangements established for the IITCP. Overall oversight has been provided by the Shetland IITC Programme Board, which has monitored progress, provided strategic direction and ensured alignment between the impact assessments and the wider OBC. This has helped to ensure that assessment findings are integrated into programme development and decision-making at an appropriate stage.

3.1.2 An Impact Assessment Working Group was established to support this process, comprising SIC officers with relevant policy, legal and community expertise. The group has also provided specialist input through a series of topic-specific workshops, designed to capture service-level insights on local pressures, risks and opportunities associated with inter-island connectivity. These workshops have informed the development and refinement of emerging findings across the impact assessments.

3.1.3 Across all themes, the engagement consistently highlighted affordability and the cumulative cost of frequent travel, reliability and disruption impacts (including weather and staffing constraints), timetable-related barriers that drive exclusion or overnight stays, and the knock-on effects on access to services, workforce delivery, business costs and social participation. A further recurring message was the need to consider inclusive access alongside any connectivity change, particularly for non-car users, and to recognise potential place-based effects on island identity and community cohesion where connectivity is significantly altered.

3.2 Engagement and Evidence

3.2.1 This interim report draws on baseline evidence and engagement undertaken for the Shetland IITCP Case for Change and Strategic Outline Case (SOC), and on locally available data sources such as the Shetland Partnership's indicators and profiles, health and resident survey material, and engagement findings gathered to date. The assessment also draws on a range of existing evidence from previous consultations, survey and community engagement undertaken as part of transport and island policy development relevant to the Shetland IITCP.

3.2.2 This interim report does not present detailed consultation findings, which are reported elsewhere. Instead, it focuses on how engagement evidence informs understanding of potential impacts and priorities.

4 Baseline Data & Engagement Evidence

4.1 Overview

4.1.1 This section outlines the evidence base used to inform the interim ICIA assessment for the Shetland IITCP, including the study area and key data sources used to establish baseline conditions and potential impacts.

4.1.2 The assessment is based primarily on local datasets and analysis prepared by the Shetland Partnership and its associated public and third sector bodies, providing context on inequality, socio-economic disadvantage and access to services within island communities.

4.2 Study Area

4.2.1 The study area comprises eight of Shetland's ferry-served island communities: Bressay, Fetlar, Foula, Papa Stour, Skerries, Unst, Whalsay and Yell. These islands vary in population size, demographic profile, economic structure, service provision and connectivity to the Shetland Mainland.

4.2.2 The islands are characterised by small, dispersed populations, high reliance on ferry services and limited alternative transport options, with remoteness and weather exposure shaping access, affordability and resilience.

4.2.3 While sharing common island challenges, localities differ in demographic change, health outcomes, employment structure, income levels, housing and digital connectivity, and service provision; this influences how impacts are experienced.

4.3 Data Sources

4.3.1 The interim impact assessments are underpinned by baseline analysis for the study area's eight island communities. This has drawn on a wealth of available evidence including routine census data, public health data, and briefings prepared through the Shetland Partnership, including local organisations such as the SIC and National Health Service (NHS) Shetland, including:

- Shetland Partnership Plan Annual Reports[2];
- Shetland Partnership Plan Latest Indicator Data[3];
- Shetland Partnership Locality Profiles Locality Profiles[4];
- NHS Shetland Population Health Survey (Nov21-Aug22)[5];
- Shetland Mainland and Island Resident Survey; and
- Shetland Mainland and Island Business Survey.

[2] Annual Reports – Shetland Partnership

[3] Indicators – Shetland Partnership

[4] Locality Profiles – Shetland Partnership

[5] Population Health Survey - Healthy Shetland

4.3.2 A summary of key issues relevant to the ICIA are provided below.

4.4 Baseline Data Summary

4.4.1 This summary provides an initial overview of key social, economic, health and environmental characteristics across the island localities relevant to the IITCP. It identifies crosscutting issues that are likely to influence the scope of the impact assessment.

4.4.2 The detailed baseline aims to respond to overarching questions set out in Appendix A to understand key considerations relevant to inter-island connectivity and the scope of the impact assessments.

- **Population change and demographic pressures** are a significant issue in Shetland's localities. Yell, Unst and Fetlar, Whalsay and Skerries show patterns of rapidly ageing populations alongside small numbers of children and young people. Skerries, Papa Stour and Foula show even smaller and declining populations that are highly sensitive to even minor demographic changes. These trends include ageing populations, declining numbers of children and young people, and in some places, schools have been mothballed due to no pupils on the school roll. These have implications for long-term service viability, community resilience and the ability of localities to sustain a labour supply.

- **Areas such as Yell, Unst and Fetlar also show high levels of chronic pain and poorer self-reported health**, combined with weaker early mortality performance. This suggests potential increased demand for essential health and social care services, labour force pressures and informal care responsibilities. Ageing populations and changing health needs also highlight the need for enhanced accessibility considerations within Shetland's transport network to meet the needs of individuals with disabilities, limited mobility and cognitive or sensory impairments.

- **Educational access and school rolls**: the school on Bressay was permanently closed in 2014, whilst Papa Stour, Fetlar and Skerries schools have all been mothballed for a number of years. This increases dependency on transport links for young people and may exacerbate out-migration of families.

- **High cost of living pressures relative to income** are a prominent feature in peripheral islands. Localities such as Whalsay and Skerries, and Yell, Unst and Fetlar record some of the lowest median incomes alongside some of the highest living costs, with increased reliance on out-of-work benefits in some areas reinforcing a picture of growing financial vulnerability. Where working-age populations are small and occupational structures are narrow, these pressures can compound existing inequalities and influence how different groups experience changes in transport provision. Housing is also dominated by owner-occupation across the islands; while this can contribute to stability, it limits flexibility in meeting the needs of key workers, those requiring supported accommodation and individuals seeking to move into or within the islands. Although many dwellings fall within lower council-tax bands, this does not necessarily reflect overall living costs, and together these factors are important when considering future demand generated by different transport options.

- **Access inequality is a key consideration across localities:** Across almost all islands, Scottish Index of Multiple Deprivation (SIMD) 2020 data[6] show that Access is one of the

[6] SIMD scores are calculated for datazones, which in some cases span multiple islands or combine island and Mainland areas. For example, Papa Stour and Foula are included within Mainland datazones, and Bressay shares a datazone with parts of Lerwick. As a result, SIMD rankings may not fully reflect the lived experience of access deprivation within individual islands.

most deprived domains. This is structurally related to geographic remoteness but interacts with health access, education, food supply, housing maintenance and economic participation.

- **The structure of employment varies considerably between the localities:** Whalsay and Skerries are more dependent on fisheries, for example, which carries implications for occupational risk and exposure to economic fluctuations within key sectors which can create different forms of economic vulnerability and shape how households are affected by changes to inter-island connectivity.

- **Car dependence is high across all localities**, with Whalsay and Skerries recording the highest ownership levels. This reflects a combination of limited public transport, distance, remoteness and challenges in accessing active or sustainable modes. These patterns are central to assessments of accessibility, affordability, carbon emissions and equality of travel opportunities.

- **Mental wellbeing indicators are broadly in line with the Shetland average**, although loneliness appears significantly lower in Whalsay and Skerries. This points to strong social connectedness, which may have a protective effect in the face of demographic or economic change. It will be important to consider how different options support or disrupt these networks.

- **Digital connectivity is highly uneven:** Some islands such as Whalsay, Yell and Unst have high rates of access to superfast broadband while others including Fetlar, Foula and Papa Stour have no access to superfast services at all[7]. Limited digital connectivity affects access to telehealth, remote education, employment opportunities, banking and social contact, and may reinforce isolation in the most remote communities. This is particularly significant where physical access to services is already constrained.

- Many islands demonstrate high reliance on voluntary effort to sustain social infrastructure, community hubs, energy systems and local services: While this is a considerable strength, it is also sensitive to demographic change and the availability of working age residents. Coupled with limited service provision and access constraints, this may influence community resilience and the cumulative impacts of transport changes.

4.4.3 Overall, the baseline indicates that the islands face interconnected demographic, economic, housing, transport, digital and health challenges. These issues are unevenly distributed and are likely to shape how each locality experiences the impacts of different connectivity options. The interim impact assessments will explore these issues in greater depth and consider how proposed options may support or challenge long-term sustainability, equity of access and quality of life across the islands.

4.5 May 2026 Engagement Summary

4.5.1 The Council and consultant team undertook a series of engagement activities in May and June 2026. This comprised in-person public drop-in sessions in the candidate fixed link islands of Bressay, Unst, Whalsay and Yell, as well as Fetlar, which forms an integral part of the overall Bluemull Sound solution. In addition, MS Teams discussions were planned with communities in Foula, Papa Stour and Skerries; however, at the time of reporting these had not yet taken place.

4.5.2 The purpose of the engagement was to update communities on progress since the previous round of engagement in March 2025, including presentation of the Transport Planning

[7] However, at the time of writing, Fetlar is still in scope for the R100 Programme in 2027 which is a Scottish Government initiative aimed at providing faster broadband access to homes and businesses across Scotland.

Objectives (TPO), the approach to option development, headline appraisal findings, and next steps. The sessions also provided an opportunity for attendees to ask questions and provide feedback on the emerging options. It is important to note that this programme was not intended to provide a representative sample of public opinion, but rather to inform communities and capture a range of views.

4.5.3 Feedback received through the engagement indicated a generally positive view of fixed link options across several communities, reflecting perceived benefits in terms of improved accessibility, connectivity, and resilience of transport links. Across locations, key issues raised included the affordability of options, the potential need for phased delivery, and the implications of reduced reliance on ferry services. Engagement materials were generally well received, although some participants noted a degree of technical complexity.

4.5.4 Further information from the public engagement sessions are presented within the island-specific Scottish Transport Appraisal Guidance (STAG) appraisal sections of the Network Strategy OBC Report where this has been considered under the criterion of Public Acceptability.

5 Bluemull Sound

5.1 Introduction

5.1.1 The Bluemull Sound corridor connects Unst and Fetlar to Yell and onward to the Shetland mainland through a sequence of linked movements. This means the practical experience of connectivity is shaped not only by the crossing itself, but also by the ability to make onward connections, manage booking and capacity constraints, and travel at the times required for work, education, caring responsibilities and access to services. The route therefore has an outsized influence on day-to-day liveability, perceptions of remoteness, and the longer-term sustainability of communities, particularly given the small scale of island populations and the sensitivity of local services and labour markets to relatively minor changes in accessibility.

5.1.2 The ICIA assessment below considers how four option typologies may shape outcomes for island communities: Business as Usual, Ferry Do Something, Ferry Do Max, and a Fixed Link between Unst and Yell. A key distributional issue is that a fixed link would materially change connectivity for Unst, while Fetlar would remain reliant on a ferry service under any fixed link scenario, creating the potential for differential outcomes if mitigations are not designed in.

5.2 Demographic impacts

5.2.1 Connectivity influences demographic outcomes through its effect on the feasibility and attractiveness of living on island across different life stages. Under Business as Usual, continued constraints on reliability, operating flexibility and capacity are likely to reinforce existing demographic pressures by increasing the friction of everyday life, particularly for households balancing employment, education and caring responsibilities across islands. This tends to be felt most acutely by working-age residents and younger people who need predictable access to training, employment and services, and by older residents who may require more frequent off-island travel and accompanied journeys.

5.2.2 Ferry Do Something can moderate these pressures by improving predictability, reducing the likelihood of not obtaining space at critical times, and easing the cumulative stress associated with multi-leg journeys. These changes support population retention by making day-to-day living more manageable and by improving access to opportunities and services that influence household decisions about staying. The demographic effect is likely to be positive but incremental, as the underlying dependency on timetabled ferry travel and the perceived “break in the journey” remains.

5.2.3 Ferry Do Max provides the strongest ferry-based demographic pathway by increasing frequency and operating flexibility to a level that can support commuting patterns, spontaneous travel, and more reliable access to education and services. This can help address demographic imbalance by widening the practical labour and education catchment for island residents and by making it more feasible for younger people to remain on island while accessing opportunities elsewhere. It can also reduce isolation for older residents and those with caring responsibilities by lowering the time burden and uncertainty associated with travel.

5.2.4 A Fixed Link between Unst and Yell changes the demographic dynamic most significantly for Unst by enabling 24-hour road access and removing one of the key structural constraints on mobility. This has the potential to support both retention and inward migration by reducing perceived remoteness and improving the feasibility of combining island living with employment, education and service access on the mainland.

5.3 Economic impacts

5.3.1 Economic resilience in the Bluemull Sound communities is shaped by the cost, reliability and convenience of moving people, goods and services across islands. Under Business as Usual, businesses continue to face a cost premium associated with ferry dependency, including the direct cost of travel, extended journey times and the uncertainty costs that arise when reliability risks are priced into quotations or lead to declined work. These effects can constrain competitiveness, reduce investment confidence and limit the ability of island employers to access labour from elsewhere in Shetland. They also affect public service delivery and asset maintenance by increasing the time and coordination needed to deliver routine services on island.

5.3.2 Ferry Do Something reduces the uncertainty premium by improving reliability and capacity, supporting more stable supply chains and reducing the risk of disruption to freight and contractor movements. This can improve the viability of key sectors and help island businesses operate more efficiently, with likely benefits for local employment and apprenticeships where improved mobility supports recruitment and training access. The overall economic uplift is expected to be positive, but some structural constraints remain because ferry travel still breaks journeys and limits true flexibility, particularly for work patterns that are not easily aligned to timetables. For communities such as Fetlar, where the scale and diversity of the local economy are more limited, these improvements may not necessarily translate into a noticeable change in economic activity on their own.

5.3.3 Ferry Do Max provides a larger economic benefit by supporting a more “mainland-like” connectivity experience in practical terms. Higher frequency and longer operating hours can improve workforce mobility, reduce down-time caused by missed connections, and enable more responsive logistics for time-sensitive activities. This is particularly relevant where businesses rely on access to contractors, specialist services or labour that is not available locally. Affordability assumptions also matter: where resident travel costs are reduced, there may be secondary benefits for labour participation and household spending retained in the local economy. However, for Fetlar, the extent to which these improvements lead to tangible economic change is likely to depend on how they interact with local circumstances, including the existing business base and opportunities for growth. Deliverability is a material consideration because the scale of operational uplift requires robust staffing and contingency to avoid underperformance against expectations.

5.3.4 A Fixed Link removes ferry-related uncertainty for Unst and strengthens the economic case for investment and expansion by enabling predictable, flexible movement of labour and goods at all times. It also reduces the psychological barrier associated with multi-leg commutes and can therefore materially improve recruitment prospects for island employers. The distributional challenge remains that Fetlar would continue to face ferry-related costs and constraints. As a result, the direct economic implications for Fetlar may be more limited, with outcomes likely to depend on the extent to which any changes to the residual ferry service improve day-to-day accessibility and support existing economic activity. If fixed links materially improve the relative position of linked islands, Fetlar may experience a relative improvement in the residual ferry service in terms of accessibility and operating convenience.

5.4 Social wellbeing and access to services

5.4.1 For Bluemull Sound communities, connectivity underpins access to healthcare, education, childcare, social care and essential retail, as well as participation in social and cultural activity. Business as Usual maintains current barriers to access, including constraints that can lead residents to travel less than they would like and miss out on essential activities. This affects wellbeing through practical consequences such as missed or delayed appointments and through the cumulative stress and fatigue associated with complex, multi-leg journeys that are sensitive to disruption. These impacts are more pronounced for people with lower flexibility,

including those with health needs, disabilities, caring responsibilities, families with young children and older residents.

5.4.2 Ferry Do Something improves access by reducing booking anxiety and improving the predictability of travel for routine appointments, education and day-to-day needs. Enhanced capacity and reliability can also support the mobility of visiting clinicians and social care staff, which is important where service provision relies on staff travelling to island communities. These changes can reduce the stress burden of travel and support mental wellbeing, while also strengthening the practicality of maintaining informal care networks across islands.

5.4.3 Ferry Do Max provides a more substantial uplift by increasing the range of times that travel is feasible, which supports attendance at appointments, access to training and employment, and participation in social life without needing to structure the day around a narrow set of sailing windows. Where affordability is improved, it can also reduce cost-of-living pressures for households that must travel frequently, particularly where travel costs influence the decision to defer trips for health, shopping or social needs.

5.4.4 A Fixed Link provides the greatest change for Unst in relation to critical services by enabling unrestricted access and reducing emergency response and transit times. It also reduces vulnerability to combined disruption risks, where ferry disruption and limited alternative response capacity can create anxiety and potential service access delays. The wellbeing benefits for Fetlar under a fixed link scenario are less direct because ferry dependency remains; outcomes for Fetlar would therefore be shaped by how the residual ferry service is specified, its reliability and frequency, and the affordability balance between any tunnel tolling and remaining ferry fares. Accessibility for non-car users is also central in a fixed link scenario, as equitable access depends on the availability and frequency of connecting public transport that can replicate the inclusivity of foot passenger travel.

5.5 Community resilience and quality of life

5.5.1 Community resilience relates to the capacity of island communities to sustain population, services and social networks in the face of demographic change, economic uncertainty and disruption. Under Business as Usual, continued exposure to reliability and capacity constraints can increase the effort required to maintain employment, service access and social ties, particularly where travel must be carefully planned. However, evidence from island contexts indicates that strong social cohesion, local identity and community-led activity already play a significant role in supporting quality of life, and are not solely determined by connectivity.

5.5.2 Ferry Do Something supports resilience by improving the consistency and usability of the connection, lowering the day-to-day friction of island living, and strengthening the practical feasibility of maintaining social and economic ties beyond the island. By reducing travel stress and improving predictability, it can support participation in a wider range of activities. However, improved connectivity should be understood as complementing, rather than driving, community resilience, which in island settings is often sustained through strong local networks.

5.5.3 Ferry Do Max has the potential among ferry-based options to further reduce the need to plan daily life around sailing times and to increase flexibility in how and when journeys are undertaken. This may support participation in activities across islands and on the Shetland Mainland where this is desired. At the same time, there is no clear evidence that increased mobility directly leads to higher quality of life in island communities. Research suggests that measures of wellbeing, including loneliness, can be comparatively favourable in remote island settings due to strong community cohesion. As such, the benefits of enhanced connectivity should be considered as enabling choice and access, rather than as a direct determinant of

social outcomes. The key resilience risk remains that expectations of a high-service model must be matched by operational deliverability.

5.5.4 A Fixed Link would provide a step change in physical accessibility for Unst by removing the sea crossing constraint and enabling continuous access. This may support resilience through more flexible access to services, employment opportunities and wider social networks where these are sought. However, community resilience and quality of life are not solely a function of connectivity, and remote communities demonstrate strong outcomes across these measures regardless of their transport links. Distributional impacts therefore remain central. Fetlar continues to rely on ferry access, and there is potential for differing experiences of accessibility across the islands. In addition, a fixed link must address inclusivity for people without cars to ensure that any changes in connectivity support, rather than inadvertently constrain, participation for all groups.

5.6 ICIA Impact Summary

5.6.1 The scores presented below in **Table 5.1** apply the Assessment Criteria Matrix to each option against the four ICIA themes used. Scores reflect the likely direction and relative scale of effect on meeting island community needs and advancing equality of opportunity, noting that some impacts depend on operational and affordability assumptions, particularly for the Fixed Link and Ferry Do Max options.

5.6.2 It should be noted that while the overall impact for Bluemull is positive for ferry enhancement options, this primarily reflects improvements for Unst. Fetlar is likely to experience more modest benefits due to continued reliance on ferry connections, which moderates the overall effect.

Table 5.1: Bluemull Sound Interim ICIA Scoring Summary

Assessment theme	Business as Usual	Ferry Do Something	Ferry Do Max	Fixed Link
Demographic impacts	-	+	++	++
	Ongoing reliability, capacity and connection constraints sustain out-migration risk and limit access to education, employment and services, particularly across multi-leg journeys.	Incremental improvements in reliability and capacity support retention and reduce day-to-day travel friction, without materially changing perceived remoteness.*	Higher frequency and extended operating flexibility most strongly support retention and demographic balance by reducing booking and missed-connection constraints.**	Transformative for Unst, but overall demographic gains are moderated by Fetlar's continued ferry dependency and by affordability and non-car access assumptions.***
Economic impacts	-	+	++	++
	Maintains high cost premiums driven by unreliability, journey breaks and uncertainty, constraining labour access, supply chains and	Reduces some uncertainty costs and improves freight and contractor viability, but core ferry-dependent constraints on mobility and logistics remain.*	Strongly improves operating flexibility and capacity, supporting workforce mobility and supply chain resilience; fare assumptions may reduce cost burdens.**	Removes uncertainty and strengthens productivity and labour catchment for Unst; benefits are greatest where wider North Isles

Assessment theme	Business as Usual	Ferry Do Something	Ferry Do Max	Fixed Link
	investment confidence.			connectivity improves.***
Social wellbeing and access to services	-	+	++	++
	Barriers to essential services persist, with continued stress and missed opportunities linked to capacity, booking and disruption risk.	Improves predictability for routine appointments and essential trips, reducing booking anxiety for regular users.*	Largest ferry-based improvement through frequency and operating flexibility, reducing the practical and wellbeing burden of multi-leg travel.**	Step-change for Unst, including emergency access benefits, assuming affordability and non-car accessibility are addressed through complementary measures.***
Community resilience and quality of life	**0**	**0**	**+**	**+**
	Continued disruption exposure and travel friction weaken confidence in long-term viability and reduce participation in wider social and economic life.	Neutral impact on day-to-day dependability, supporting social participation and informal support networks.*	Best ferry-based uplift to liveability through increased spontaneity and connection confidence, supporting social cohesion and participation.**	Transformative resilience benefits for Unst by removing a key constraint, assuming distributional impacts for Fetlar and inclusive access for non-drivers are mitigated.***

* Benefits are uneven across Bluemull, with more limited gains for Fetlar.

** Gains are concentrated in Unst; Fetlar experiences smaller effects.

*** Benefits for Fetlar are comparatively modest without further connectivity improvements due to ongoing ferry dependency.

6 Bressay

6.1 Introduction

6.1.1 The Bressay route is distinct within the inter-island network because of Bressay's immediate proximity to Lerwick and the high degree of functional integration between the island and the town. For many residents, travel demand is characterised less by infrequent, long-distance trips and more by regular, routine movement for commuting, education, shopping, appointments and social activity. The route also has a comparatively high proportion of foot passengers, reflecting the central location of the ferry berth in Lerwick and the short crossing time.

6.1.2 In this context, the key challenges and opportunities associated with future connectivity are shaped by three interlinked factors: the cost burden of frequent travel; the reliability and usability of the day-to-day service (including peak crowding and the passenger experience at terminals); and the extent to which options either strengthen or disrupt the existing integration of Bressay with Lerwick. The options considered range from continuation of the current ferry-based system (with incremental enhancements) through to a fixed link, which would represent a step-change in access but would also alter the relationship between the island and the town and introduce new distributional and place-based considerations.

6.2 Demographic Impacts

6.2.1 Demographic outcomes on Bressay are closely linked to whether the island is perceived as an affordable and practical place to live while accessing the opportunities and services concentrated in Lerwick. Because travel is frequent for many households, the cumulative cost and effort of crossing can influence retention, particularly for working-age residents and families, while older residents and those with long-term health needs can be affected by the ease and comfort of routine travel and the ability to travel at the times required.

6.2.2 Improvements that reduce barriers to frequent travel can support demographic balance by expanding access to jobs, training and services and by reducing the day-to-day friction of island living. On Bressay, this is most likely to be realised through affordability measures and service usability rather than through major changes in journey time.

6.2.3 Bressay is relatively small in population terms and is highly service-dependent on Lerwick. This means changes to connectivity can have a disproportionate impact on day-to-day life because many essential and discretionary activities are undertaken on the Mainland. The distributional impact within the community is also important: those on lower incomes, those without access to a car, and those reliant on accompanied travel may experience greater sensitivity to cost, comfort and waiting environment.

6.2.4 Business as Usual is likely to maintain current patterns of dependence on routine ferry travel to access employment, education and services in Lerwick. The principal demographic risk under this option is that the cost and inconvenience of frequent travel continues to shape household decisions over time, particularly for people who travel most often and those for whom travel is essential rather than discretionary.

6.2.5 Ferry Do Something is likely to provide modest demographic benefits through a more user-friendly service offer, particularly if it reduces both the financial burden of frequent crossings and the friction associated with peak travel while improving the passenger environment. For Bressay residents, cost is a key concern given the need to travel regularly to Lerwick to access essential services, employment, education and day-to-day needs. Measures that improve affordability alongside reliability and ease of use would therefore strengthen the

primary pathway to demographic benefit, helping to reduce barriers to routine movement between the island and Lerwick and supporting sustained participation in works and services. Because Bressay is already in close proximity to Lerwick, the overall demographic effect is expected to be incremental rather than transformational, but could still be meaningful if it addresses both cost pressures and usability issues that influence daily life.

6.2.6 Ferry Do Max is likely to strengthen demographic resilience by improving frequency and reducing the constraints associated with planning around timetables, particularly for people balancing work, appointments, school and caring responsibilities. It can also reduce stress and uncertainty for those who need to travel regularly and may support retention by making island living more compatible with varied working patterns. The extent of the demographic benefit is strongly shaped by fare assumptions and by whether improvements translate into reduced cumulative cost burdens for households that travel most frequently.

6.2.7 A fixed link would change the relationship between Bressay and Lerwick most fundamentally, effectively making the island part of a wider “Greater Lerwick” travel area. This could support retention and inward migration by removing timetable constraints and enabling 24-hour access, but the net demographic outcome would depend heavily on toll policy and the extent to which the link is accessible for those without a car. If the fixed link primarily benefits car users and introduces a cost barrier through tolling, there is potential for uneven impacts across the community and for some residents to experience little improvement relative to a ferry-based option with reduced fares and a strong foot passenger offer.

6.3 Economic impacts

6.3.1 The Bressay economy is highly integrated with Lerwick, with a strong emphasis on commuting and personal travel rather than high-volume freight movements. The economic role of connectivity is therefore primarily to enable participation in the Lerwick labour market, support access to services and contractors, and remove cost and reliability frictions that affect everyday productivity. Local business activity and any island-based employers also benefit from reliable access to labour, customers and supplies, but the route is less freight-dependent than other parts of the network.

6.3.2 Costs are most likely to be influenced by the cumulative expense of frequent crossings for residents and workers, and by the time and uncertainty associated with peak demand or service disruption. Options that reduce travel costs or improve the ease of moving at the times needed are likely to have the strongest economic effect on Bressay.

6.3.3 Because many residents work in Lerwick, connectivity directly shapes employment participation. Reducing cost burdens can support labour market functioning by enabling people to take up work, increase hours, and access a wider range of jobs and training opportunities without the cumulative cost becoming prohibitive.

6.3.4 Bressay’s key vulnerability is that frequent travel amplifies the economic impact of fares and waiting time burdens. There is also a route-specific equity issue due to the high proportion of foot passengers: options that improve access mainly for car users risk leaving a significant segment of travellers behind unless public transport provision and affordability are addressed.

6.3.5 Business as Usual maintains current economic patterns and constraints. The primary downside is the continuation of a cost barrier that affects frequent travellers, with potential knock-on effects for labour market participation, disposable income, and the practical feasibility of commuting and training. Economic impacts from reliability are generally less severe than on more remote routes, but any disruption still carries a high day-to-day impact because of travel frequency.

6.3.6 Ferry Do Something is likely to deliver positive economic effects by improving the usability of the service and, critically, by reducing the cost barrier where fare reductions are part of the option. This would support labour market participation, make commuting less burdensome, and improve access to opportunities in Lerwick for people who are currently constrained by the cumulative cost of travel. The scale of benefit is expected to be strong relative to the modest nature of the service change, reflecting the short route and high frequency of trips.

6.3.7 Ferry Do Max strengthens economic outcomes primarily through frequency and convenience, supporting more flexible working patterns and reducing time costs associated with waiting and missed connections. It can also improve the passenger experience at terminals, supporting foot passenger travel and making day-to-day movement between Bressay and Lerwick more straightforward. The overall economic benefit depends on the balance between improved convenience and the cost and deliverability of sustaining a higher intensity service pattern.

6.3.8 A fixed link would provide the most fundamental change in access and could support economic development opportunities that are difficult to realise under ferry-based options, particularly land-use and housing development that expands the effective urban area around Lerwick. However, the extent of economic benefit is highly sensitive to toll levels and the availability of a bus service that provides an equivalent offer for non-car users. Without these, a fixed link could advantage some groups while leaving others with persistent cost or access barriers, limiting overall inclusivity of the economic uplift.

6.4 Social Wellbeing and Access to Services

6.4.1 Bressay relies on Lerwick for most formal health provision and many services. As a result, the ferry is a key enabling link for routine appointments, urgent access, education, childcare arrangements, social care coordination and essential retail. Because the crossing is short and relatively frequent, the principal determinants of wellbeing impacts are affordability, reliability, and the comfort and safety of the passenger environment.

6.4.2 Resilience matters most for people who require time-sensitive access to care, those with limited flexibility, and those who experience stress and exclusion when services are disrupted or reduced. Even where contingency runs are possible, the need to cross water can still create anxiety in emergencies, particularly given there is no formal on-island health provision.

6.4.3 Cost-of-living pressures are a central consideration for Bressay because high-frequency travel amplifies the effect of fares. This is particularly important for lower-income households and those who need to travel regularly for work, caring responsibilities or health needs.

6.4.4 Better affordability and usability can support informal networks by making it easier to provide support across the water, attend appointments with others, and sustain day-to-day participation in social life. Conversely, options that reduce accessibility for foot passengers could undermine inclusivity and increase isolation for some groups.

6.4.5 Business as Usual maintains existing access patterns but does not address the affordability pressure associated with frequent travel. For those who already ration trips due to cost, this can translate into missed social opportunities and reduced participation, and for some households it may also affect willingness to attend routine appointments or undertake discretionary trips that support wellbeing. Any reduction in frequency during parts of the day or capacity constraints during refit can disproportionately affect groups such as older residents, children and young people, shift workers, carers and those with long-term conditions by reducing flexibility and increasing stress.

6.4.6 Ferry Do Something is likely to improve wellbeing outcomes through modest service enhancements and improvements to the waiting and boarding environment, supporting safer and more comfortable travel for foot passengers and those travelling with children or mobility

needs. Where fare reductions apply, this option has particular relevance for reducing cost-of-living pressures and enabling people to travel as often as they need without the cumulative cost becoming prohibitive. Improvements are expected to be most noticeable in day-to-day convenience rather than in emergency access.

6.4.7 Ferry Do Max strengthens access by providing greater frequency and flexibility, which supports attendance at appointments, participation in education and childcare arrangements, and easier travel for social activity. Improved terminal arrangements and a more protected pedestrian environment can be important for perceived safety and comfort. The wellbeing benefit is amplified where fares are reduced or removed for residents, as this directly addresses the most frequently cited barrier to travel on this route.

6.4.8 A fixed link provides 24-hour access and removes dependence on ferry timetables, which can improve wellbeing by increasing spontaneity and reducing anxiety associated with disruption. It also offers some benefit for emergency and unscheduled healthcare access. However, the overall wellbeing impact depends on whether the link is affordable and accessible for non-car users. If a fixed link requires toll payment and does not provide an equivalent, frequent and affordable bus service, there is potential for reduced inclusivity, particularly given the high proportion of foot passengers on the existing route.

6.5 Community Resilience and Quality of Life

6.5.1 Bressay's resilience is closely tied to its role as a residential community linked to Lerwick. Long-term sustainability depends on the affordability and practicality of day-to-day movement, the ability to access opportunities without disproportionate cost burdens, and maintaining a strong sense of community life on the island rather than becoming solely a commuting hinterland. It is also important to recognise that resilience in island settings is often underpinned by strong local identity, social networks and community-led activity, which are not solely determined by connectivity.

6.5.2 Connectivity influences how easily residents can participate in social, cultural and leisure activities in Lerwick, while also enabling visitors, community activity and informal support networks. Because social travel is more discretionary, it can be sensitive to cost. However, participation and social cohesion in island communities are shaped by a wider range of factors, including locally organised activity and strong community relationships. As such, reduced travel does not necessarily equate to reduced quality of life, and in some cases communities demonstrate high levels of wellbeing despite more limited connectivity.

6.5.3 Unlike more remote routes, Bressay does not face multi-leg journey dependency to reach Lerwick. The key differentiation is instead the high frequency of trips and the importance of foot passenger accessibility. Options that improve cost and usability for frequent travellers can enhance flexibility and choice in how residents engage with services and activities beyond the island. However, these effects should be understood as enabling access rather than determining overall quality of life, which remains strongly influenced by community cohesion and local circumstances.

6.5.4 Business as Usual retains the current resilience profile and therefore maintains exposure to cost pressures and any usability shortcomings in terminals and the passenger experience. Over time, the continued need to consider travel costs may shape patterns of participation for some households. However, this does not necessarily imply a uniform reduction in community resilience, given the strength of local social networks and the role of on-island activity in supporting wellbeing.

6.5.5 Ferry Do Something improves resilience by enhancing the dependability and usability of the connection and, where fare reductions apply, by reducing a potential barrier to travel. This can broaden opportunities for social contact and access to activities and services for those

who wish to travel more frequently. At the same time, these improvements complement existing forms of community resilience rather than fundamentally altering them, as social cohesion is already supported through local activity and relationships.

6.5.6 Ferry Do Max provides the strongest ferry-based increase in flexibility by reducing the extent to which daily life is structured around fixed timetables. Improvements to pedestrian experience and waiting environments can also support perceived safety and comfort. This may enable a wider range of participation across different groups where there is demand. However, there is no clear evidence that increased mobility directly leads to improved quality of life, and outcomes will continue to depend on how residents balance on-island and off-island activity. The resilience gain therefore relates primarily to increased choice and convenience.

6.5.7 A fixed link could increase physical accessibility and reduce disruption sensitivity by providing continuous access between Bressay and Lerwick. This may support participation and integration where this is desired. However, it may also alter patterns of daily life and the relationship between the island and the town. As with other options, community resilience and quality of life are not determined by connectivity alone. The overall outcome will depend on how changes in accessibility interact with community identity, patterns of activity and inclusivity. Ensuring access for non-drivers and managing the balance between connectivity and island distinctiveness will be important in understanding whether a fixed link supports or changes existing forms of resilience.

6.6 ICIA Impact Summary

6.6.1 The scores presented below in **Table 6.1** apply the Assessment Criteria Matrix to each option against the four ICIA themes. Scores reflect the likely direction and relative scale of effect on meeting island community needs and advancing equality of opportunity. For Bressay, the assessment is particularly sensitive to affordability outcomes (given high travel frequency), and to how any fixed link would serve non-car users, including foot passengers.

Table 6.1: Bressay Interim ICIA Scoring Summary

Assessment theme	Business as Usual	Ferry Do Something	Ferry Do Max	Fixed Link	
Demographic impacts	-	+	++	+	?
	Cost and usability constraints on frequent travel continue to limit the attractiveness of island living for some households and can reinforce unequal access to opportunities across life stages.	Reduced barriers to routine travel support retention and day-to-day liveability, with greatest benefits where affordability improves for frequent travellers.	High-frequency travel with reduced cost barriers most strongly supports retention, access to opportunity and inclusive island living for those who rely on regular off-island movement.	Potentially improves access and could support in-migration, but outcomes depend heavily on toll levels and whether an equivalent, affordable service is provided for non-car users.	
Economic impacts	0	+	+	+	
	The existing connection broadly supports commuting and access to Lerwick, with economic	Lower cost and modest service enhancements improve labour market participation and reduce friction	Greater frequency and reduced cost barriers support flexible working patterns and productivity, but the	Could enable wider development opportunities and 24-hour access, but economic benefits are contingent on	

Assessment theme	Business as Usual	Ferry Do Something	Ferry Do Max	Fixed Link	
	constraints driven more by cumulative travel cost than by connectivity.	for employment, training and routine business activity.	overall uplift is limited by the route's already strong integration with Lerwick.	tolling, inclusion of non-car users and deliverability of a comparable public transport offer.	
Social wellbeing and access to services	-	+	++	++	?
	Many residents can access services in Lerwick, but cost and passenger experience issues can reduce discretionary travel and participation, contributing to isolation for some.	Improved affordability and passenger environment support routine appointments, social participation and reduced stress for regular users.	Very frequent, low-barrier travel most strongly supports participation in social life and timely access to services, particularly for those with limited flexibility or higher travel needs.	24-hour access and removes timetable constraints, risks creating new access barriers for foot passengers and non-drivers unless affordable, frequent alternatives provided.	
Community resilience and quality of life	0	0	+	+	?
	Continued cost pressures on frequent travel can weaken participation and perceived quality of life for some households over time.	Reduced barriers to movement strengthen day-to-day resilience, participation and informal support networks linked to Lerwick.	High-frequency, affordable access most strongly improves liveability and supports sustained community participation and social cohesion.	Could increase resilience via continuous access, overall quality-of-life outcomes depend on inclusivity, toll affordability and how this affects island's relationship with Lerwick.	

7 Whalsay

7.1 Introduction

7.1.1 Whalsay is one of Shetland's more populous island communities, with a strong community identity and an economy characterised by high skills and high levels of car-based travel. The ferry connection between Symbister and Laxo, with diversions at times to Vidlin, underpins access to employment, education, healthcare, retail and social activity on mainland Shetland. While Whalsay has some on-island services, including a GP practice, dental surgery and a care home, many essential and specialist services remain mainland-based, including hospital care in Lerwick.

7.1.2 This route is also notable for two additional factors that shape option impacts:

- Peak capacity and booking constraints can limit travel at the times residents most need, affecting both economic participation and quality of life.
- The ferry service provides a source of local employment, with crews for multiple vessels drawn from Whalsay. This is a route-specific consideration if a fixed link replaces ferry operations.

7.1.3 The assessment below considers four option typologies: Business as Usual, Ferry Do Something, Ferry Do Max, and Fixed Link.

7.2 Demographic Impacts

7.2.1 Demographic sustainability in Whalsay is linked to whether residents can access mainland opportunities without disproportionate cost, uncertainty or delay. While the island has a relatively strong community base, constraints on travel can influence retention over time, particularly for working-age households, young people accessing education or training, and older residents who need reliable access to Mainland services and visiting networks. A further consideration is the effect of options on local jobs supported by ferry operations, which can influence household stability and retention.

7.2.2 Options that improve frequency, reliability and affordability can support demographic balance by widening practical access to education, training and employment on mainland Shetland, and by reducing the burden of planning travel around tight booking windows. For Whalsay, this is particularly important because there is evidence that some residents travel less than they would like and miss out on opportunities, including employment and education-related activities.

7.2.3 Within Whalsay, distributional effects are likely to be most pronounced for:

- Lower-income households and those who travel frequently, where cumulative costs shape travel behaviour.
- Older residents, disabled people, carers and families with young children, where predictability, accessibility and reduced stress are critical.
- Residents without access to a car or who do not wish to drive, particularly under a fixed link scenario if equivalent public transport is not provided.

7.2.4 Business as Usual maintains reliance on the current timetable and booking system, with continued sensitivity to peak capacity and reduced resilience during refit periods. This can

sustain barriers to Mainland opportunities, contributing to long-term retention pressures for working-age households and young people, and increased stress for older residents and carers who require dependable access to services. Demographic impacts are therefore likely to be broadly neutral for those already well-adapted to the current system, but adverse for groups more constrained by affordability, booking competition and limited flexibility.

7.2.5 Ferry Do Something is likely to deliver modest demographic benefits by reducing booking anxiety and improving usability and reliability at the margins. Increased capacity and improved marshalling and traffic management can reduce the practical friction of travelling, supporting residents to access education, employment and services more consistently. The demographic effect is expected to be positive but incremental, as the fundamental dependency on timetabled ferry travel remains.

7.2.6 Ferry Do Max is likely to provide a more significant demographic benefit by delivering a step change in service level, reducing competition for space and improving the feasibility of regular mainland participation for work, training and education. This improves day-to-day liveability and can support retention by reducing travel-related stress and planning burden. However, the demographic benefit depends on deliverability, including the ability of staff to operate an intensified service consistently.

7.2.7 A fixed link has the potential to be genuinely transformative for demographic outcomes by providing 24-hour access and removing timetable and booking constraints. This could support retention and inward migration by making island living more compatible with mainland employment and service access. However, the overall demographic outcome is moderated by two route-specific considerations. First, tolling and the availability of affordable alternatives for non-car users will shape whether benefits are evenly distributed. Second, replacing the ferry service risks localised impacts through the loss or redeployment of ferry jobs currently supported by Whalsay-based crews, which could affect household stability for some residents.

7.3 Economic impacts

7.3.1 Whalsay has a distinctive economic structure, with a high share of resident employment linked to the pelagic fishing sector. Although freight volumes are not as significant as might be expected because catch is not landed or processed on the island, the economy is strongly dependent on reliable labour mobility and access to Mainland services, contractors and markets. For this route, the primary economic pathway is therefore improved labour market functioning, rather than major freight transformation.

7.3.2 Costs are shaped by the cumulative effect of fares, time, and uncertainty. Where peak capacity limits access to sailings, households and businesses can face additional time costs, lost opportunities and higher planning burden. Improvements that reduce booking competition and improve reliability are likely to reduce these indirect costs. A fixed link can remove uncertainty costs for travel, but may introduce toll costs depending on policy.

7.3.3 Improved connectivity can support residents to enter employment, access more productive roles, and work additional hours by reducing travel barriers. This is particularly relevant where residents report they are missing out on employment opportunities due to current constraints. At the same time, the ferry service itself is an employer, and changes that remove ferry operations would have employment implications on the island.

7.3.4 The most significant vulnerabilities are:

- Reliance on car-based access and limited bus integration at mainland terminals, which may constrain non-drivers.

- The potential localised employment effect if ferry jobs are lost under a fixed link.

- The interaction between diversion to Vidlin and local road impacts, including increased movements through the village and past the primary school.

7.3.5 Business as Usual retains existing constraints on labour mobility, including peak capacity issues and the cost and friction of island travel. This can dampen labour market participation and reduce access to mainland employment opportunities, particularly for those who are sensitive to cost or unable to accommodate booking uncertainty. The economic impact is likely to be broadly neutral for established travel patterns, but adverse for growth in mainland participation and for households currently constrained by cost and capacity.

7.3.6 Ferry Do Something can improve economic outcomes by easing peak capacity pressure and improving reliability, supporting more consistent commuting and access to mainland employment and services. Improvements to traffic management and terminal arrangements can also reduce disruption impacts during diversions and improve overall system usability. The uplift is expected to be positive but modest, particularly if affordability measures reduce the cost barrier for frequent travel.

7.3.7 Ferry Do Max provides the largest ferry-based economic uplift by reducing competition for space, increasing operating flexibility, and improving the reliability of regular mainland participation. This can strengthen labour market functioning and reduce the time and uncertainty costs associated with travel. Economic benefits could also arise indirectly through improved viability of housing maintenance and construction activity, where the practical and perceived barriers of island logistics are reduced. The key risk is that high-service benefits depend on staffing and operational deliverability.

7.3.8 A fixed link is the most economically transformative option in terms of reducing travel uncertainty and enabling frictionless commuting, which could materially improve labour market access and productivity. It may also strengthen the viability of housing development and maintenance by reducing the cost and disruption associated with island logistics, potentially increasing demand to live on the island. However, the economic case is moderated by two distributional issues: toll affordability (and the impact on frequent travellers) and the potential loss or redeployment of ferry employment currently based on Whalsay.

7.4 Social Wellbeing and Access to Services

7.4.1 Whalsay has some on-island provision, but residents still depend on mainland Shetland for hospital care and some specialist services. This includes time-sensitive travel for appointments and emergency transfer by ambulance via the ferry route when required. Social wellbeing is also influenced by the ability to participate in social and cultural activities, shopping and personal business on the mainland, which are commonly missed out on when residents travel less than they would like.

7.4.2 Resilience is particularly important for older residents, those with long-term conditions, carers and families, where missed appointments or disrupted travel can have wider consequences. Reduced service during refit, single-vessel working, weather-related cancellations and diversion arrangements can all exacerbate stress and exclusion. Options that improve resilience reduce these pressures and can improve health equity.

7.4.3 Cost-of-living impacts arise through fares, the frequency with which people need to travel, and the indirect costs of time and uncertainty. For Whalsay, affordability is a significant factor influencing how often residents travel. Under a fixed link, toll policy becomes the main determinant of affordability impacts, and the per-vehicle nature of tolling can affect households differently depending on travel patterns and car occupancy.

7.4.4 Informal networks remain important, particularly for older people and carers. Better connectivity can strengthen visiting patterns, enable family support, and support visiting service provision. Conversely, if a fixed link reduces accessibility for non-drivers, it could weaken participation for some groups unless mitigated.

7.4.5 Business as Usual maintains current access patterns, with continued risk that timetables, peak capacity and reduced resilience during refit periods constrain timely access to preventative care, specialist appointments and mental health support on the mainland. These constraints can increase stress and reduce wellbeing, particularly for those who require predictable travel or accompanied journeys.

7.4.6 Ferry Do Something offers a modest wellbeing benefit through improved reliability, capacity and terminal arrangements, which reduce booking anxiety and the risk of being unable to travel for appointments. It also supports the mobility of visiting clinicians and social care staff. These changes can reduce travel-related stress and fatigue, particularly for frequent travellers.

7.4.7 Ferry Do Max provides a clearer social wellbeing benefit by delivering a step change in capacity and service level, reducing competition for space and increasing flexibility for appointments, education and family commitments. This can improve health equity by reducing the likelihood of missed or delayed travel and improving predictability. However, benefits depend on operational deliverability and maintaining consistent service standards.

7.4.8 A fixed link provides the most significant wellbeing benefit for time-critical and emergency access by enabling 24-hour travel and reducing reliance on ferry availability. It can also reduce isolation by supporting spontaneous travel and access to health-promoting activities and services. The principal wellbeing risk is distributional: without affordable and frequent public transport through the link, non-drivers and those who rely on foot passenger travel could experience reduced accessibility.

7.5 Community Resilience and Quality of Life

7.5.1 Long-term sustainability in Whalsay is linked to maintaining a viable balance between on-island life and Mainland opportunity. Options that reduce travel barriers can support resilience by enabling access to employment, services and wider opportunities where this is valued. However, Whalsay's resilience is also strongly shaped by its established community assets, social networks and local identity, meaning that quality of life is not determined by connectivity alone.

7.5.2 Social cohesion may be influenced by the ease with which residents can participate in social, cultural and family life beyond the island, particularly where cost or booking constraints affect discretionary travel. Improved connectivity can expand options for participation for those who wish to travel more frequently. At the same time, evidence from island communities indicates that strong social cohesion and comparatively positive wellbeing outcomes can be sustained independently of high levels of mobility, reflecting the importance of locally rooted activity and relationships. Changes that reduce inclusivity for non-drivers could still weaken cohesion for some groups.

7.5.3 Whalsay is relatively close to the Mainland compared with the North Isles, but still experiences island-related barriers, particularly in peak periods and when diversions occur. The key differentiator between options is therefore the extent to which they reduce booking competition, improve resilience during refit or disruption, and ease the practical constraints associated with timetabled travel. These changes primarily influence convenience and choice rather than directly determining overall quality of life outcomes.

7.5.4 Business as Usual maintains existing resilience limitations linked to reliance on timetables, booking competition and reduced service resilience during refit or disruption. This can sustain a planning burden and shape participation for some households, particularly those requiring flexibility. Overall, quality of life outcomes are likely to remain varied, reflecting differences in how residents adapt to and value existing travel patterns alongside strong community-based support structures.

7.5.5 Ferry Do Something strengthens day-to-day resilience by improving reliability, capacity and terminal arrangements, reducing the stress associated with booking constraints and improving confidence in being able to travel when needed. This can support participation in activities beyond the island for those who seek it, while complementing rather than replacing the role of local community life in sustaining wellbeing.

7.5.6 Ferry Do Max provides the strongest ferry-based increase in flexibility by improving frequency, reducing capacity competition and increasing confidence in making essential and discretionary trips. This may enable greater spontaneity and wider participation where there is demand. However, there is no clear evidence that increased mobility directly leads to improved quality of life in island settings, and outcomes will continue to depend on how residents balance on-island and off-island activity. The main resilience risk relates to deliverability, including staffing and the complexity of delivering major changes to terminal arrangements.

7.5.7 A fixed link offers a step change in physical accessibility by removing ferry dependency, reducing disruption sensitivity and enabling 24-hour access. This can expand options for employment, service use and wider engagement with the Mainland where desired. As with other options, the implications for community resilience and quality of life are not solely defined by connectivity, and will depend on how increased accessibility interacts with community identity, local activity and patterns of daily life. The main risks are distributional and place-based: impacts on non-drivers if equivalent public transport is not provided, and localised effects linked to the loss or redeployment of ferry-related employment on Whalsay.

7.6 ICIA Impact Summary

7.6.1 The scores presented below in **Table 7.1** apply the Assessment Criteria Matrix to each option against the four ICIA themes. The scores reflect that, relative to Business as Usual, the three enhancement options progressively improve Whalsay outcomes by reducing the practical barriers associated with timetabled travel, peak capacity constraints and booking anxiety. Ferry Do Something is expected to deliver a modest but positive uplift across themes, largely through improved reliability and capacity at the margins. Ferry Do Max provides the strongest ferry-based performance, reflecting a step-change in frequency and capacity that supports access to work, services and social participation and reduces stress associated with constrained travel choices. The Fixed Link has the potential to be transformative, particularly for time-critical access and overall connectivity, but is scored as uncertain at this stage because the scale and distribution of benefits depend heavily on toll affordability, provision for non-drivers and the localised employment implications of replacing ferry operations.

Table 7.1: Whalsay Interim ICIA Scoring Summary

Assessment theme	Business as Usual	Ferry Do Something	Ferry Do Max	Fixed Link
Demographic impacts	-	+	++	++
	Continued reliance on timetables and peak booking constraints can limit access to education, training and employment, increasing long-term retention pressures for some households.	Improved reliability and capacity reduce booking anxiety and support more consistent access to mainland opportunities, with benefits for groups needing predictable travel.	Step-change in service level reduces competition for space and increases flexibility, most strongly supporting retention and the ability of young people and working-age residents to access opportunities.	Potentially transformative 24-hour access could support retention and inward migration, but outcomes depend on toll affordability, inclusive provision for non-drivers, and local employment effects linked to ferry replacement.
Economic impacts	-	+	++	++
	Peak capacity, frequency and cost barriers can constrain labour market participation and increase the time and uncertainty costs of accessing mainland work and services.	Some reduction in travel friction and capacity constraints supports improved labour market functioning and more reliable access to mainland services and contractors.	Greater frequency and capacity most strongly improve labour mobility and reduce time and uncertainty costs, supporting participation in work, training and service delivery.	Removes ferry-related uncertainty and enables frictionless commuting, but overall economic effects are sensitive to tolling, non-car access, and potential loss or redeployment of ferry-related employment.
Social wellbeing and access to services	-	+	++	++
	Timetable reliance and reduced resilience during refit or disruption can constrain timely access to mainland-based healthcare and services, increasing stress for those with health needs or caring responsibilities.	Improved reliability and capacity reduce the risk of being unable to travel for appointments and can lower travel stress, supporting more equitable access to services.	Higher service levels and reduced booking competition most strongly improve flexibility for routine and time-sensitive journeys, reducing stress and missed access.	Provides a step-change in time-critical and emergency access and reduces disruption risk, but the distribution of benefits depends on toll affordability and provision of frequent, affordable alternatives for non-drivers.
Community resilience and quality of life	0	0	+	+
	Ongoing capacity and timetable constraints sustain a planning burden and can limit participation in social, cultural and family life on the mainland, with uneven effects across groups.	Incremental improvements strengthen day-to-day dependability and reduce booking anxiety, supporting participation and informal support networks.	Increased frequency and capacity provide the strongest ferry-based uplift to liveability, enabling greater spontaneity and confidence in making essential and discretionary trips.	Could significantly improve resilience via 24-hour access and reduced disruption sensitivity, but overall quality-of-life outcomes rely on inclusive access for non-drivers and management of local employment impacts.

8 Yell Sound

8.1 Introduction

8.1.1 This section considers how alternative connectivity options for Yell could influence island community outcomes, focusing on four ICIA themes: demographic change, economic wellbeing, access to services, and community resilience and quality of life. The assessment recognises that Yell is both a community in its own right and a strategic gateway within the North Isles, supporting onward movement to Fetlar and Unst. As a result, changes to connectivity across Yell Sound can have distributional effects beyond Yell, influencing access and opportunity for neighbouring islands as well as residents and businesses on Yell.

8.1.2 Yell has on-island health provision including a GP practice and dental surgery, but residents remain dependent on Mainland Shetland for hospital care in Lerwick and sometimes for specialist treatment beyond Shetland. The ferry service is therefore an important enabler of health access, education, employment and social participation. It is also central to freight and business activity because Yell supports a significant manufacturing sector and acts as the primary gateway to activity in the North Isles, including the emerging SaxaVord Spaceport in Unst. The route is the most freight intensive in the network, and stakeholders consistently highlight that the uncertainty and risk premium associated with ferry dependence is often more economically consequential than the fare itself.

8.1.3 Four option typologies are considered: Business as Usual, Ferry Do Something, Ferry Do Max, and Fixed Link. The assessment is particularly sensitive to the balance between affordability and accessibility for non-car users under any fixed link scenario, and to the wider distributional effects for Fetlar and Unst.

8.2 Demographic Impacts

8.2.1 For Yell, demographic sustainability is shaped by access to Mainland education and employment, the practicalities of maintaining social ties, and the ability to travel for services and appointments without excessive cost or stress. While on-island services reduce some day-to-day dependency, residents still rely on the ferry for hospital care and wider opportunities. Constraints on reliability, booking and the planning burden of timetabled travel can influence retention and inward migration over time, particularly for young adults, families, and those with caring responsibilities.

8.2.2 Options that reduce travel friction and improve reliability can support demographic balance by widening access to education, training and employment, as well as opportunities linked to culture, sport and social life on Mainland Shetland, and by reducing the perceived barrier of living on an island. A key route-specific factor is the “break in the journey” effect associated with ferry crossings, which consultation suggests can deter potential workers even where overall travel time is comparable to a direct drive.

8.2.3 The demographic effects of improved Yell Sound connectivity are not confined to Yell. Because Yell is the gateway to Fetlar and Unst, improvements can strengthen access and opportunity for those islands as well. Distributional effects within Yell are also important. Households on lower incomes, older people, disabled people, carers, families with young children, and those without access to a car are likely to be more sensitive to affordability, predictability and accessibility of the overall travel offer.

8.2.4 Business as Usual maintains current reliance on timetables and ferry-dependent journey planning. While the route has relatively high frequency, ongoing issues relating to reliability, reduced service during refit and the need to book can still constrain access to Mainland

opportunities and contribute to travel stress. This can reinforce long-term demographic pressures where residents limit travel or where working-age households perceive island living as imposing a persistent barrier to employment and education access.

8.2.5 Ferry Do Something provides incremental demographic benefits by improving service reliability, capacity and the passenger environment, supporting more predictable access to services and opportunities. This can improve retention by reducing the day-to-day friction of travel and lowering stress associated with making essential trips. The option can also support wider North Isles demographic sustainability by improving the gateway function of Yell, although the fundamental break in the journey remains.

8.2.6 Ferry Do Max potentially offers a larger demographic sustainability, than Ferry Do Something by further strengthening connectivity and, where applicable, reducing affordability barriers through resident fare assumptions. The option meaningfully reduces travel friction, increases flexibility for work, education and caring responsibilities, and materially lowers the perceived barrier of island living compared to existing conditions. It can reduce the anxiety associated with occasional booking constraints and provide greater flexibility for work, education and caring responsibilities.

8.2.7 A fixed link is likely to be the most transformative for demographic outcomes because it removes the ferry break in the journey, enables 24-hour access, and reduces the perceived and practical barriers associated with island living. This can support retention, inward migration and labour mobility. The demographic benefit would extend beyond Yell by improving access for Fetlar and Unst, especially if complementary improvements are delivered across other North Isles links. However, the distribution of benefits depends on toll affordability and ensuring that non-car users have an equivalent, frequent and affordable public transport offer. Without this, new inequalities could emerge.

8.3 Economic impacts

8.3.1 The North Isles economy is export-driven, with a strong aquaculture and fisheries base and emerging nationally significant activity linked to SaxaVord Spaceport. Yell Sound is the most freight intensive route, meaning ferry dependency can constrain productivity, supply chain stability and investment confidence. In this context, the economic impact of options is strongly influenced by the extent to which they reduce uncertainty and the disruption risk premium associated with ferry dependence.

8.3.2 Businesses report three principal cost channels: fares, extended journeys, and uncertainty risk premiums. Consultation indicates that uncertainty costs, including inflated quotations, declined work and unproductive time, are often more significant than the fare itself. Options that reduce this uncertainty are therefore likely to deliver the strongest business benefit, particularly for freight-intensive activity.

8.3.3 Labour recruitment and retention is consistently identified as a critical constraint for North Isles businesses, with ferry dependency acting as a barrier to attracting workers from Mainland Shetland. The perceived inconvenience of a ferry break in the commute can deter potential employees even where overall journey time is short. Improving connectivity therefore supports labour market functioning and can increase employment participation, productivity and training access.

8.3.4 Because Yell is a gateway, route choices can create unequal outcomes across the North Isles. Options that materially improve connectivity for Yell can also unlock benefits for Unst and Fetlar, while options that leave the break in the journey intact may continue to constrain labour access and investment confidence. Affordability and the availability of inclusive alternatives for non-car users also shape distribution of benefits.

8.3.5 Business as Usual maintains current cost and uncertainty burdens for freight and business users, including productive time lost waiting for and travelling on ferries and wider disruption risk premiums. This continues to constrain productivity, labour mobility and investment confidence, with knock-on implications for employment and community sustainability across the North Isles.

8.3.6 Ferry Do Something provides positive economic benefits through improved reliability, terminal facilities and service quality, which can reduce some disruption costs and support more stable logistics. It can also contribute to improved labour mobility, although it does not remove the ferry break in the commute that stakeholders describe as a key barrier.

8.3.7 Ferry Do Max provides major beneficial economic impacts by significantly strengthening reliability, capacity and cost predictability, alongside, where applicable, fare reductions that reduce cost burdens for households and businesses. These improvements are expected to materially reduce uncertainty premiums, support more efficient freight movement, and strengthen labour mobility and recruitment across the North Isles. The scale of change goes beyond incremental uplift and is anticipated to support increased investment confidence and productivity, particularly for freight-intensive sectors reliant on the Yell Sound crossing.

8.3.8 A fixed link is a “game changer” for the North Isles economy because it removes ferry-related uncertainty and constraint, reduces unproductive time, and materially strengthens labour mobility and investment confidence. Stakeholders anticipate that it could unlock substantial additional output by lifting production constraints, with benefits extending beyond Yell to the wider North Isles. It also supports housing development viability by reducing the cost and difficulty of construction and maintenance logistics. The economic benefit is moderated by toll policy and the need to ensure that the fixed link supports inclusive access, including for non-car users.

8.4 Social Wellbeing and Access to Services

8.4.1 While Yell has some on-island health provision, residents still depend on travel to Lerwick for hospital care and many services, and sometimes to mainland Scotland for specialist treatment. The ferry therefore supports routine access and emergency transfer by ambulance when required. A substantial proportion of residents report travelling away less than they would like, missing out primarily on social activity and shopping but also on health appointments and employment-related opportunities.

8.4.2 Resilience improvements are most significant for older residents, carers and those with long-term conditions, where disruption or reduced service during refit can exacerbate stress and exclusion. Enhancing reliability and reducing the risk of missed connections improves health equity by increasing predictability of travel for treatment. In emergencies, a fixed link materially reduces ambulance response and transit times and mitigates the combined risk of ferry disruption and limited alternative response capacity.

8.4.3 Affordability is a key driver of travel behaviour for Yell residents, with both car and passenger fares cited as factors limiting travel. Ferry options with reduced or free resident fares could ease cost-of-living pressures for frequent travellers. Under a fixed link scenario, the balance of tolls and fares becomes central, and the per-vehicle nature of tolling can affect households differently depending on travel patterns.

8.4.4 As the gateway to the North Isles, improved connectivity for Yell can strengthen informal networks and service access for neighbouring islands by improving the reliability and predictability of onward travel. However, if fixed links increase geographic inequalities, islands or groups that remain dependent on timetabled services could experience relative disadvantage unless mitigations are designed into service planning and affordability policy.

8.4.5 Business as Usual maintains the current access pattern, where timetables and disruption can constrain timely access to mainland-based healthcare and services and contribute to stress for those requiring predictable travel. While capacity constraints are generally less acute than on some routes, reliability and refit impacts can still reduce confidence and increase anxiety for essential travel.

8.4.6 Ferry Do Something improves wellbeing by strengthening reliability, terminal facilities and the passenger environment, reducing stress and improving predictability for essential trips. Improvements to waiting facilities can also enhance personal security and the experience for foot passengers.

8.4.7 Ferry Do Max provides major beneficial improvements to wellbeing by enhancing flexibility, reliability and affordability in a way that materially improves access to essential and discretionary travel. The option is expected to significantly reduce travel-related stress, improve confidence in attending healthcare appointments, and support more frequent social and economic participation.

8.4.8 A fixed link provides the most significant step change for wellbeing, particularly for emergency and time-critical access and for reducing the stress associated with ferry dependency. However, benefits are contingent on toll affordability and the provision of frequent, affordable public transport through the link to avoid creating new access barriers for non-car users and those who prefer not to drive.

8.5 Community Resilience and Quality of Life

8.5.1 Long-term sustainability in Yell and the wider North Isles is influenced by whether connectivity supports stable access to employment, services and supply chains without imposing disproportionate costs or uncertainty. Options that reduce disruption sensitivity and strengthen confidence in reliable access support resilience and the feasibility of sustaining population and economic activity. However, community resilience in island settings is also strongly shaped by local identity, social networks and community-led activity, and is not determined by connectivity alone.

8.5.2 A significant share of residents report missing out on social activities and visiting family and friends due to reduced travel. Improved connectivity can enable more frequent participation and reduce the planning burden associated with island living for those who wish to travel more often. At the same time, evidence from island contexts indicates that strong social cohesion and positive wellbeing outcomes can be maintained independently of high levels of mobility. Improvements in transport should therefore be understood as expanding choice and access rather than directly strengthening social cohesion. Conversely, if fixed links primarily benefit car users, participation may become less equitable for those without access to a vehicle.

8.5.3 Because Yell is a gateway, improvements can reduce the multi-leg journey burden for Unst and Fetlar as well as for Yell residents. Fixed links could also create a step change in comparative accessibility, potentially widening disparities between linked and non-linked locations if mitigations are not implemented. These differences relate to access and convenience rather than directly determining overall quality of life outcomes.

8.5.4 Business as Usual sustains current resilience limitations linked to ferry dependency and disruption risk, maintaining the planning burden associated with timetabled travel and the ongoing uncertainty premium for businesses and households. While this can influence how people organise travel and participation, community resilience continues to be supported by established local networks and patterns of activity.

8.5.5 Ferry Do Something provides a positive resilience effect by improving service quality and predictability, which can reduce travel-related stress and support participation for those seeking to travel more frequently. It can also strengthen the gateway function of Yell by improving the reliability of movement for the wider North Isles. These benefits complement existing forms of community resilience rather than fundamentally changing them.

8.5.6 Ferry Do Max provides a major beneficial uplift in terms of flexibility, reliability and affordability, which can materially reduce disruption sensitivity and improve confidence in accessing services and opportunities. This may support greater participation and reduce practical barriers to travel. However, there is no clear evidence that increased mobility directly leads to improved quality of life, and outcomes will continue to depend on how residents balance on-island and off-island activity alongside strong community cohesion.

8.5.7 A fixed link provides the most substantial improvement in physical accessibility by removing ferry dependency, reducing disruption sensitivity and strengthening the ability to access services, employment and social networks at any time. This expands opportunities and flexibility where these are desired. However, overall implications for resilience and quality of life are not solely defined by connectivity, and depend on inclusive access for non-drivers and the affordability of tolls, as well as how changes in accessibility interact with community identity and established patterns of island life across Yell and the wider North Isles..

8.6 ICIA Impact Summary

8.6.1 The scores presented below in **Table 8.1** apply the Assessment Criteria Matrix to each option against the four ICIA themes. The interim ICIA indicates that Yell's outcomes improve progressively as options move from maintaining the current ferry-based model towards reducing the structural constraints that limit access and opportunity.

8.6.2 Business as Usual remains adverse overall because it continues to expose residents and businesses to timetable dependency, disruption risk and the cumulative time and uncertainty costs associated with ferry travel. Ferry Do Something is assessed as beneficial across themes because it improves reliability and the travel experience and helps reduce day-to-day friction, supporting more consistent access to services, employment and social participation. Ferry Do Max is assessed as major beneficial, reflecting the scale of improvements in reliability, flexibility and affordability and the resulting step change in access, economic performance and community wellbeing compared to current conditions.

8.6.3 The Fixed Link is assessed as major beneficial because it removes ferry dependency and provides continuous access, with the greatest potential to strengthen freight efficiency, labour market functioning, and time-critical access to services, while also supporting wider North Isles connectivity given Yell's gateway role.

Table 8.1: Yell Interim ICIA Scoring Summary

Assessment theme	Business as Usual	Ferry Do Something	Ferry Do Max	Fixed Link
Demographic impacts	-	+	++	++
	Continued reliance on timetables and ferry dependency sustains barriers to education, employment and service access, contributing to	Improved service quality and reliability reduce day-to-day friction, supporting retention, but the ferry break in the journey remains.	Enhanced connectivity and affordability materially reduce travel barriers, supporting stronger retention and inward migration, with	Removes the ferry break in the journey and enables 24-hour access, supporting retention and inward migration potential, with benefits extending to wider

Assessment theme	Business as Usual	Ferry Do Something	Ferry Do Max	Fixed Link
	longer-term retention pressures for some households.		benefits extending to the wider North Isles through Yell's gateway role.	North Isles access via Yell as the gateway.
Economic impacts	-	+	++	++
	Ongoing ferry dependency sustains time loss and uncertainty costs for freight and business users, constraining productivity, labour mobility and investment confidence across the North Isles gateway.	Improves reliability and terminal arrangements, reducing some disruption costs and supporting more stable logistics, but does not remove the structural uncertainty premium of ferry dependence.	Additional service uplift and resident fare assumptions likely to reduce costs. Frequency also reduces travel uncertainty premiums, improves freight efficiency, labour mobility and investment confidence, delivering substantial economic uplift.	Most economically transformative by removing ferry-related uncertainty and unproductive time, strengthening freight efficiency, labour access and investment confidence, with benefits extending beyond Yell to North Isles activity.
Social wellbeing and access to services	-	+	++	++
	Timetable reliance and disruption risk can constrain timely access to mainland-based healthcare and services, increasing stress for older people, carers and those with long-term conditions.	Improves predictability and the passenger environment, supporting routine access to services and reducing travel stress for frequent users.	Greater reliability, flexibility and affordability significantly improve access to healthcare, social activity and employment, reducing stress and supporting wellbeing.	Step-change in time-critical and emergency access through 24-hour connectivity, reducing reliance on ferry availability and strengthening access to health and wellbeing infrastructure.
Community resilience and quality of life	0	0	+	+
	Ferry dependency maintains a planning burden and disruption sensitivity that can limit participation and sustain isolation risk for some groups.	Improves reliability and confidence in making essential and discretionary trips, supporting participation and reducing stress.	Material reduction in disruption sensitivity and improved liveability through enhanced service levels and affordability, supporting participation and social cohesion.	Removes a key structural constraint on mobility, improves resilience to disruption through continuous access, participation and connectivity for Yell and the wider North Isles gateway.

9 Foula

9.1 Introduction

9.1.1 Foula is one of Shetland's most remote and smaller island communities, where the resilience of everyday life is can be shaped by the reliability of lifeline connections for goods, essential supplies and access to services. The Foula ferry route performs a different role to many other inter-island routes. It is primarily a supply-chain service, with passenger travel more commonly supported through air services. This means that the impacts of ferry options are most likely to be realised through freight capacity, operational flexibility around weather windows, and the ability to move goods and equipment safely and predictably, rather than through commuting or day-to-day passenger mobility.

9.1.2 Two options are considered for Foula at this stage:

- Business as Usual
- Ferry Do Something

9.1.3 The Ferry Do Max and Fixed Link typologies are not applicable to this route.

9.2 Demographic Impacts

9.2.1 Population retention on Foula is influenced by the viability of living on a small, remote island with limited local services, an ageing trend typical of peripheral communities, and strong dependency on resilient supply chains. While passenger connectivity improvements through the ferry are not the primary pathway for demographic change, the ferry remains important to sustaining the practical conditions that support residents to remain, particularly through access to goods, building materials, and the ability to respond to household and infrastructure needs.

9.2.2 Given the role of the air service for passenger movement, ferry options are unlikely to drive a step-change in access to education and employment directly. However, ferry performance can still influence long-term demographic sustainability indirectly by supporting the reliability of freight, reducing disruption impacts on day-to-day living, and enabling the movement of equipment and supplies needed to maintain housing and local assets.

9.2.3 Foula's small population means impacts can be disproportionate even where changes are minor in absolute terms. Any degradation in the supply-chain function of the ferry can potentially have outsized consequences for household resilience and perceptions of liveability. Conversely, improvements that marginally increase reliability or reduce short-shipping can have meaningful effects on confidence and community sustainability.

9.2.4 Under Business as Usual, the ferry service is maintained on a like-for-like basis. This is broadly consistent with community expectations, given that the current operating model is viewed as working for Foula and is structured around local knowledge and flexibility. Demographic impacts are therefore expected to be largely neutral, with ongoing risks primarily associated with the inherent challenges of remoteness, weather exposure, and reliance on a lifeline service.

9.2.5 Ferry Do Something introduces a larger vessel with improved seakeeping and some access improvements; alongside more substantial harbour works. There may be demographic benefit, but this cannot be guaranteed by transport change alone. This could be through reducing the practical burden of island living, support the maintenance of housing and local

infrastructure, and strengthen confidence in the viability of remaining on the island. The scale of effect on inward migration or youth retention is expected to be limited because passenger travel needs are primarily met through the air service.

9.3 Economic impacts

9.3.1 Foula's economic resilience is closely tied to dependable supply chains and the ability to move goods, materials and occasional larger items efficiently. Given the limited scale of the local economy, even small changes in freight reliability or capacity constraints can affect costs and the feasibility of island-based activity, including maintenance works and any small business operations that rely on timely deliveries.

9.3.2 On Foula, costs are more likely to be influenced by short-shipping, the frequency with which freight must be delayed due to weather and capacity limits, and the cost and complexity of bringing equipment or contractors to the island. Workforce mobility effects are less prominent than on routes with commuting demand.

9.3.3 The ferry service supports local employment through the operating model, including island-based crew roles that provide direct economic value and help embed local knowledge in service delivery. Access to employment on the Shetland mainland is less directly shaped by ferry options because passenger travel is more commonly undertaken by air, although the ferry remains important for enabling the movement of goods and equipment that support island activity and self-sufficiency.

9.3.4 Foula's key vulnerability is the sensitivity of a small economy to supply-chain disruption. Any reduction in the effectiveness of the freight function can increase costs and constrain essential works. Conversely, incremental improvements that reduce short-shipping and allow larger items to be moved can provide outsized benefits relative to the island's scale.

9.3.5 Business as Usual is expected to be broadly neutral in economic terms, maintaining the existing service model that is regarded as functioning well for the island's needs. The current approach supports flexibility around weather windows and sustains local employment linked to the service. Economic impacts under this option are therefore primarily shaped by baseline remoteness challenges rather than option-specific change.

9.3.6 Ferry Do Something offers modest economic benefits through improved vessel capability. This may reduce journey times and support operating sailings in tighter weather windows, increasing the likelihood that freight can move when needed. It can also reduce the incidence of short-shipped goods and enable the movement of larger single items such as plant, which can materially improve the efficiency of maintenance and island works. These benefits are expected to be incremental rather than transformative, but they align well with the route's supply-chain function.

9.4 Social Wellbeing and Access to Services

9.4.1 For Foula, ferry options are less likely to drive direct changes in access to health care and other services because passenger travel is primarily supported by air. However, the ferry remains important for sustaining everyday wellbeing indirectly through access to essential goods, supplies, and the materials needed to keep homes and community assets functional.

9.4.2 Resilience benefits on Foula are most likely to arise through improved operational safety and reliability for freight, particularly where weather conditions can constrain sailings. Even small improvements in the ability to operate safely and predictably can have a disproportionate wellbeing benefit for a remote community, primarily by reducing uncertainty and the practical consequences of delayed supplies.

9.4.3 On this route, cost-of-living pressures are more likely to be influenced by the reliability and effectiveness of goods movement than by passenger travel costs. Where supplies are delayed or short-shipped, households may experience higher costs, reduced availability, or increased planning burden. Options that reduce these risks can therefore provide modest cost-of-living relief indirectly.

9.4.4 The sustainability of local informal support networks on Foula is closely linked to the island's overall resilience and the ability to maintain housing and basic infrastructure. Improved freight reliability can support this by enabling repairs, maintenance, and delivery of supplies that underpin day-to-day living, particularly for older residents and those with greater support needs.

9.4.5 Business as Usual is likely to have a broadly neutral effect on social wellbeing and service access. The ferry continues to meet its primary supply-chain role through the established operating model. Any wellbeing risks are mainly associated with the baseline challenges of operating lifeline services to a remote island rather than the option itself.

9.4.6 Ferry Do Something delivers a modest positive effect on wellbeing through improved seakeeping capability and minor accessibility improvements onboard, alongside more significant harbour works that may create further opportunity to improve access at the interface between vessel and shore. The most meaningful wellbeing pathway is increased operational resilience for freight and a reduction in disruption risk, which supports household and community stability. It should be noted that ship-to-shore accessibility remains challenging and full step-free access is likely to remain difficult in practice.

9.5 Community Resilience and Quality of Life

9.5.1 On Foula, resilience is shaped by the ability to sustain basic supply chains, maintain housing and infrastructure, and operate lifeline services in a way that reflects the realities of remoteness and weather exposure. Foula's resilience is further shaped by being an 'off-grid' island, with electricity generated by on-island systems that required supplies and maintenance for continued functionality. The existing service model, including local knowledge and flexibility, is central to this resilience and to the community's confidence in continued island living. More broadly, evidence from island contexts indicates that strong social cohesion and positive wellbeing outcomes can be sustained in highly remote settings, reflecting the importance of local identity, self-reliance and community-led activity rather than connectivity alone.

9.5.2 Given that passenger travel is largely met through air services, ferry option changes are unlikely to create major shifts in social participation directly. However, ferry reliability and freight effectiveness influence quality of life by affecting the stability of household functioning and the effort required to manage day-to-day living in a remote environment.

9.5.3 Foula's geographic remoteness and small population mean that option impacts can be disproportionately experienced. The key dependency is not multi-leg journeys but exposure to weather-related disruption and the importance of flexible operating around available windows. In this context, resilience is closely linked to adaptability and the ability to respond to local conditions rather than to increased levels of mobility.

9.5.4 Business as Usual maintains the current resilience profile. It preserves the existing operating approach that supports flexible sailings around weather and sustains island-based roles. Quality of life is therefore expected to remain broadly stable, recognising that current arrangements already support a functioning and resilient community despite inherent exposure to disruption as a feature of remote island living.

9.5.5 Ferry Do Something can strengthen resilience through improved vessel capability and the potential for fewer capacity-related constraints on freight. It may also support more reliable service operation within available weather windows, reducing uncertainty and supporting the continuity of essential supplies. These changes can ease the practical management of island life, but should be understood as supporting existing resilience rather than transforming it. The main resilience risk relates to deliverability of more significant harbour works in a remote environment, where construction logistics and the need to maintain service continuity require careful management.

9.6 ICIA Impact Summary

9.6.1 The scores presented below in **Table 9.1** apply the Assessment Criteria Matrix to each option against the four ICIA themes. It compares the two route options available at this stage, Business as Usual and Ferry Do Something, and indicates the likely direction and relative scale of effects on meeting island community needs and advancing equality of opportunity. Ferry Do Max and Fixed Link are not applicable for this route and are therefore recorded as such within the table.

Table 9.1: Foula Interim ICIA Scoring Summary

Assessment theme	Business as Usual		Ferry Do Something
Demographic impacts	0	?	+
	Maintains current operating model which the community considers to work well, with demographic outcomes shaped primarily by baseline remoteness rather than ferry service change.		Offers a modest improvement in liveability and confidence through improved vessel capability and freight resilience, which can indirectly support retention in a small community.
Economic impacts	0		+
	Maintains a service that primarily meets supply-chain needs and is viewed as functioning effectively, with no fundamental change expected in economic conditions.		Minor economic benefits through improved seakeeping and capacity, reducing short-shipping risk, supporting movement of larger items, and improving the ability to operate within tight weather windows.
Social wellbeing and access to services	0		0
	Largely neutral because passenger access needs are primarily met by air services and the ferry's main function is freight, with no material change expected in access to health and other services.		Largely neutral for direct service access, although small benefits may arise from improved onboard accessibility and reduced disruption to essential goods supply.
Community resilience and quality of life	0		0
	Maintains the current resilience profile, including local operational flexibility around weather windows, with quality of life effects driven mainly by baseline remoteness.		Improves resilience modestly through better vessel capability and reduced operational risk, supporting more dependable lifeline freight movements, noting that harbour works delivery complexity is a key consideration.

10 Papa Stour

10.1 Introduction

10.1.1 Papa Stour is a small island community where the ferry connection plays a lifeline role in enabling access to services, supplies and social contact on West Mainland and beyond. The route context is defined by two practical constraints that shape everyday life and opportunities:

10.1.2 A low passenger capacity cap on the existing service, which increases the risk of being unable to secure a booking when travel is essential.

10.1.3 Non-sailing days and a limited timetable, which restrict the ability to make day returns, increases the likelihood of requiring off-island overnight stays, and reduces flexibility for appointments, work and family commitments.

10.1.4 Two options are considered for Papa Stour at this stage:

- Business as Usual (PS1).
- Ferry Do Something (PS2).

10.1.5 Ferry Do Max and Fixed Link are not applicable for this route.

10.2 Demographic Impacts

10.2.1 On a small island, demographic sustainability can be sensitive to the practical burden of accessing education, healthcare, work and social networks. Where connectivity is infrequent or difficult to secure, this can increase out-migration pressures, particularly for families and working-age residents. An ageing population profile also increases the importance of being able to travel reliably for appointments and to maintain support networks with family living off-island.

10.2.2 For Papa Stour, improved demographic outcomes may arise through increasing the number of travel days available, improving the feasibility of day returns, and reducing the risk of being unable to travel when needed due to capacity limits. These changes improve access to services and opportunities, with the potential to reduce challenges of island living.

10.2.3 Papa Stour's small population and limited on-island services mean that even modest changes in timetable flexibility and capacity can have disproportionate impacts. Service dependency is high, particularly for healthcare and social care needs, and for schooling and employment opportunities located elsewhere. Any improvement that reduces the need for overnight stays and increases the predictability of travel is therefore likely to ease challenges.

10.2.4 Business as Usual maintains the current pattern of limited travel days and tight day-return constraints, reinforcing the need to plan around the timetable and increasing the likelihood of overnight stays when travel does not align with sailing days. The passenger capacity cap increases the risk that essential travel, including for appointments, cannot be accommodated at short notice. These constraints may contribute to out-migration pressures over time by making the island harder to live on for families, people in work, and older residents who require regular off-island access.

10.2.5 Ferry Do Something may generate demographic benefits through two linked mechanisms. First, increased capacity reduces the likelihood of residents being unable to travel when

necessary. Second, filling non-sailing days increases flexibility across the week, improving access to services and reducing the disruption and cost associated with needing an overnight stay elsewhere. This is particularly relevant for residents travelling back from appointments or onward travel on days when a return sailing would otherwise not be available. The option also has a specific pathway to supporting younger residents by improving the feasibility of regular travel for education and social participation, subject to timetable design.

10.3 Economic impacts

10.3.1 The Papa Stour economy is shaped by small-scale activity and the island's potential as a visitor destination, alongside the practical need to access contractors, supplies and services from West Mainland. Economic outcomes are therefore linked to the cost and reliability of moving people, goods and equipment, and to the feasibility of undertaking works without extended delays or inflated contractor costs.

10.3.2 Costs are influenced by three main factors: the ability to travel on the days required, the capacity to carry vehicles and larger items (including plant), and the knock-on cost of disruption when contractors and equipment cannot be moved efficiently. Seasonal pressures are also relevant, as visitor demand can increase during summer months and place additional strain on limited capacity.

10.3.3 Improved travel flexibility supports employment by making it more feasible for residents to access opportunities on the Mainland without needing overnight stays, and by reducing uncertainty around being able to travel when required. For a small community, even modest improvements may make part-time work, training and service-based activity more realistic.

10.3.4 The key vulnerability is the compounding impact of low capacity and non-sailing days on the cost of doing business. This can translate into higher prices for essential services, inflated contractor costs, and delayed works. These effects can be disproportionately felt on small islands because costs cannot be spread across larger demand volumes and because alternatives are limited.

10.3.5 Business as Usual maintains existing economic constraints linked to capacity limits and non-sailing days. These constraints can inflate the cost of works and services on the island, particularly where contractors face higher risk of being stranded or needing overnight stays, and where equipment movements must be carefully choreographed. The island's ability to capitalise on tourism opportunities may also remain constrained during peak periods if capacity is limited.

10.3.6 Ferry Do Something offers more significant economic benefits by increasing capacity for passengers and vehicles and improving the ability to carry larger vehicles and plant. This supports more efficient delivery of works and services on the island and can reduce the cost escalation associated with poor timetable fit and gaps in sailing days. By enabling day returns on more days, the option also improves the viability of contractor movements and supports the growth of visitor activity, particularly during summer, by reducing barriers to travel and supporting more flexible trip planning.

10.4 Social Wellbeing and Access to Services

10.4.1 Papa Stour has no on-island health, dentistry or social care provision, meaning residents rely on travel to West Mainland and, for some services, to Lerwick. Access is therefore shaped by the availability of sailing days, the ability to secure bookings, and the feasibility of travelling for appointments without requiring overnight stays.

10.4.2 Resilience is particularly important given that residents must travel elsewhere for essential services. Where there is only one viable day-return opportunity, disruption or inability to obtain

a booking can have immediate consequences for appointments, caring responsibilities and wellbeing. Improving capacity and increasing the number of travel days reduces this vulnerability.

10.4.3 Cost-of-living impacts arise through the time burden of travel, the risk of needing overnight stays elsewhere, and the indirect costs passed on through higher prices for services and works. Options that reduce non-sailing day gaps can reduce overnight costs and improve household resilience.

10.4.4 On these small islands, informal support networks and the ability of friends and family to visit are an important part of maintaining wellbeing and sustaining community life. Improved connectivity increases the feasibility of reciprocal support, visiting patterns and maintaining social ties, particularly for older residents and those with health needs.

10.4.5 Business as Usual continues to constrain service access through limited travel days and capacity. For time-sensitive journeys, the combination of needing a booking and having a narrow window for day returns increases stress and can lead to delays or additional expense. The risk of requiring an overnight stay elsewhere when returning from appointments or onward travel is a particularly material wellbeing impact, as it introduces additional cost and disruption that is not experienced to the same extent in larger communities.

10.4.6 Ferry Do Something improves wellbeing and service access by removing the low passenger capacity constraint and increasing the days available to travel. This reduces the risk of being unable to attend appointments and supports more timely access to services. The option also reduces the likelihood of unplanned overnight stays, which can be a significant source of stress and financial pressure. Accessibility improvements on a modern vessel can also support people with reduced mobility, although ship-to-shore conditions and local infrastructure still influence the lived experience of accessibility.

10.5 Community Resilience and Quality of Life

10.5.1 Community resilience on Papa Stour is linked to whether residents can access essential services and opportunities without disproportionate cost and disruption. Frequent non-sailing days and tight capacity can affect confidence in the long-term viability of island living and shape how day-to-day life is organised. Conversely, options that improve flexibility and reduce travel friction can support access to services and opportunities where these are required. At the same time, resilience in island communities is also strongly influenced by local identity, social networks and community-led activity, and is not determined by connectivity alone.

10.5.2 Participation and social cohesion may be influenced by whether residents can travel for social, cultural and family purposes without needing to plan around limited sailing days or face repeated difficulty securing bookings. Increased flexibility can make it easier for people to maintain relationships beyond the island where this is valued. However, evidence from island settings indicates that strong social cohesion and positive wellbeing outcomes can be sustained even where connectivity is more limited, reflecting the importance of local relationships and community activity. Reduced connectivity may shape patterns of participation but does not necessarily equate to reduced quality of life.

10.5.3 Papa Stour's population size and service context mean that option impacts are experienced in a direct and place-specific way. The central differentiator is not multi-leg journeys but the degree to which timetable gaps and capacity constraints translate into practical challenges such as reduced flexibility, added cost and limited spontaneity. These factors primarily affect convenience and access rather than directly determining overall wellbeing.

10.5.4 Business as Usual maintains existing resilience characteristics associated with non-sailing days and limited capacity. These constraints can reduce spontaneity and increase the effort

required to organise travel, particularly for those with frequent or time-sensitive needs. While this may influence participation patterns for some residents, community resilience continues to be supported by established social networks and on-island activity.

10.5.5 Ferry Do Something can strengthen resilience by improving capacity and reducing non-sailing day gaps, supporting greater confidence in being able to travel when needed. This can ease the practical burden associated with essential journeys, reduce uncertainty around service access, and support the continued operation of services and contractors on the island. These improvements enhance flexibility and reliability, but should be understood as supporting existing community resilience rather than fundamentally reshaping it. The principal risk is deliverability associated with resourcing a higher frequency of operation, particularly staffing requirements, which will need to be managed to ensure benefits are realised in practice.

10.6 ICIA Impact Summary

10.6.1 The scores presented below in **Table 10.1** apply the Assessment Criteria Matrix to each option against the four ICIA themes. Business as Usual delivers some improvement over the current position by removing the passenger capacity constraint and increasing vehicle and plant capacity, which supports essential travel and reduces exclusion risk. Ferry Do Something is assessed as more beneficial across all themes because it addresses the additional structural constraint of non-sailing days, improving flexibility for appointments, work and social participation, reducing the likelihood of costly overnight stays, and lowering the wider cost premium of living and operating on a small island community.

Table 10.1: Papa Stour Interim ICIA Scoring Summary

Assessment theme	Business as Usual		Ferry Do Something
Demographic impacts	0	?	+
	Lifting the current passenger capacity constraint and improving usability supports retention and reduces barriers to essential travel, but non-sailing days continue to limit flexibility and can reinforce long-term pressures for a small community.		Seven-day sailings combined with higher capacity provide a clear step-change in flexibility, supporting retention, reducing the need for off-island overnights, and improving feasibility of education and family connections across the week.
Economic impacts	+		+
	Increased passenger and vehicle capacity improves the ability to move goods, plant and visitors, supporting tourism and reducing some business friction, but timetable gaps still inflate costs for contractors and limit efficient delivery of works.		Filling non-sailing days and increasing capacity reduces the cost premium of doing business, improves contractor and equipment logistics, and strengthens tourism potential by enabling travel and day returns on any day.
Social wellbeing and access to services	+		+
	Improved capacity reduces the likelihood of being unable to travel for appointments and improves accessibility on-board, but limited sailing days and tight day-return windows can still create stress and the risk of costly overnight stays.		Seven-day operation materially improves access to healthcare and other essential services by expanding appointment-day options, supporting returns from onward travel, and reducing stress, disruption and overnight costs associated with non-sailing days.

Assessment theme	Business as Usual	Ferry Do Something
Community resilience and quality of life	0	0
	Greater capacity and a modern vessel improve day-to-day usability and reduce exclusion risk, but non-sailing days continue to constrain spontaneity, participation and resilience for a remote, small population.	A consistent seven-day service strengthens resilience by reducing isolation, improving reliability of access to services and social ties, and lowering the practical burden of island living, subject to deliverability of crewing and operations.

11 Skerries

11.1 Introduction

11.1.1 Skerries is a small and relatively remote island community where the ferry service plays a lifeline role for access to goods, essential services and wider social and economic participation. The route context is defined by limited on-island provision and the practical consequences of timetable gaps, where a missed connection or a non-sailing day can result in extended delays, additional overnight stays, and increased costs for households and service providers.

11.1.2 At this stage, the route has two options:

- Business as Usual (Ske1).
- Ferry Do Something (Ske2), focused on scaling up to a seven-day timetable and enhancing route resilience, including associated infrastructure measures.

11.1.3 Ferry Do Max and Fixed Link are not applicable to Skerries.

11.2 Demographic Impacts

11.2.1 Demographic sustainability in Skerries may be influenced by the feasibility and affordability of accessing essential services, education and employment, and by whether living on the island can be maintained without disproportionate planning burden and disruption. Where connections are infrequent or gaps in the timetable are significant, the practical difficulty of attending appointments, maintaining employment links, or sustaining family life can contribute to out-migration pressures over time, particularly for working-age residents and families. An ageing profile intensifies sensitivity to travel reliability and the ability to return home promptly following appointments or onward travel.

11.2.2 In Skerries, improving weekly coverage and reducing the consequences of non-sailing days, may impact on demographic imbalance. Improvements that reduce the risk of being “stuck” away, or that make it easier to travel for appointments and essential activity without extended delays, support retention and can improve the attractiveness of island living for both existing and prospective residents.

11.2.3 Skerries is highly sensitive to service change because of its size, limited on-island provision, and dependence on mainland connections for health, social care and many day-to-day needs. This can create disproportionate impacts for specific groups including older residents, people with long-term conditions, families, and those on lower incomes who are less able to absorb the cost of unplanned overnight stays or disrupted travel.

11.2.4 Business as Usual maintains the existing service pattern, including timetable gaps that can lead to extended waits for the next connection. This can create a persistent planning burden and can increase out-migration risk over time, particularly where households need reliable access to services and opportunities. While vessel replacement can maintain continuity, the underlying constraint remains that residents may experience significant disruption when returning from appointments or onward travel on non-sailing days.

11.2.5 Ferry Do Something has the potential to provide demographic benefits by moving to a seven-day timetable. This reduces the severity of timetable gaps, improves the feasibility of planning appointments and essential travel, and reduces the likelihood that residents returning from mainland Scotland are required to remain away for multiple nights. By lowering disruption and

improving predictability, this option supports retention and reduces inequalities experienced by small island residents compared with larger communities.

11.3 Economic impacts

11.3.1 Skerries' economy and household resilience are closely tied to supply-chain reliability, given limited on-island services and uncertainty around the future of the island shops. Stable connections are therefore central to the movement of goods, delivery of services, and the viability of island living and any local enterprise activity.

11.3.2 Economic costs in Skerries are shaped by the time and uncertainty costs associated with waiting for the next sailing when services are disrupted or when travel falls on a non-sailing day. These impacts affect both businesses and households through higher service delivery costs, delayed works, and increased costs for accommodation and time away from home.

11.3.3 Improved weekly coverage supports employment and training access by reducing the risk that travel for work, short-term contracts or training is disrupted by timetable gaps. For a small community, improvements that reduce the likelihood of multi-day disruption can be particularly important in enabling people to sustain employment links and in making service delivery and contractor access more viable.

11.3.4 The most significant vulnerability is the dependence on reliable connections for supplies and services, combined with the high cost of disruption. A further route-specific vulnerability is physical resilience of access infrastructure, where any loss of usability would have severe consequences for the island's economy and lifeline access.

11.3.5 Business as Usual provides continuity and maintains the current economic baseline, with some benefit from maintaining adequate vehicle carrying capability through vessel replacement. However, timetable gaps continue to create supply-chain friction and can raise the cost of doing business and delivering services, particularly when disruption occurs near a non-sailing day.

11.3.6 Ferry Do Something delivers the most material economic benefit through seven-day operation. This improves supply-chain functioning, increases flexibility for deliveries and service providers, and reduces the cost premium associated with waiting multiple days for the next sailing. It also strengthens resilience by supporting associated measures that protect the reliability of terminal access.

11.4 Social Wellbeing and Access to Services

11.4.1 Skerries has limited on-island health provision and no dentistry or social care provision, meaning residents must travel for many routine and essential needs. Most service access is oriented towards Lerwick, and in some cases residents may use services linked to neighbouring islands. The lived experience of access is therefore strongly shaped by whether the timetable allows timely travel and return, and whether residents can avoid extended stays elsewhere.

11.4.2 Resilience is particularly important for Skerries due to its remoteness and the consequences of missing a sailing. When services align poorly with travel days, or disruption occurs, the resulting delays can be substantial. Improving timetable coverage reduces vulnerability to disruption by shortening the time until the next available connection.

11.4.3 Cost-of-living impacts arise through the cost of travel itself and, critically, through the costs associated with timetable gaps such as overnight accommodation, additional subsistence expenses, and time away from home. Reducing non-sailing day impacts can therefore reduce household cost pressures even without changes to fare levels.

11.4.4 In a small community, informal support networks and the ability of friends and family to visit are important for wellbeing, particularly where formal social care provision is absent. Improved travel flexibility supports these networks by reducing the barriers to visiting, accompanying people to appointments, and maintaining social ties.

11.4.5 Business as Usual maintains current access patterns, including the risk that residents returning from appointments or onward travel can be delayed by non-sailing days. This creates stress and potential financial burden through unplanned overnight stays and can affect timely access to healthcare and essential needs.

11.4.6 Ferry Do Something provides wellbeing benefits through seven-day operation. This increases flexibility for appointments and essential trips, reduces the likelihood of extended stays elsewhere, and supports more resilient access to services during disruption. It also improves equality of access by reducing a structural disadvantage experienced by residents of small islands relative to larger communities with daily connectivity.

11.5 Community Resilience and Quality of Life

11.5.1 Skerries' resilience is tied to the reliability of lifeline access for supplies, services and social connection. When timetable gaps are significant, the practicalities of island living increases and can undermine confidence in long-term sustainability. Conversely, improved connectivity that improves the reliability of access can support community functioning. However, as will other island communities, resilience is also strongly influenced by local identity, relationships and community-led activity, and is not determined by transport connectivity alone.

11.5.2 Social cohesion can be affected by whether residents can participate in activities, maintain ties, and host visits without needing to plan around limited sailing days or accept disproportionate disruption. Improvements that reduce the planning burden can support participation for those who wish to travel more frequently. At the same time, evidence from island settings indicates that strong social cohesion and positive wellbeing outcomes can be maintained even where connectivity is more limited, reflecting the importance of local networks and community life. Increased mobility should therefore be understood as enabling choice rather than directly determining wellbeing.

11.5.3 Skerries is likely to experience disproportionate impacts from service change due to remoteness and limited on-island provision. The key differentiator is not multi-leg travel but the severity of consequences when the timetable has gaps and disruption occurs, including the requirement to wait days for the next connection.

11.5.4 Business as Usual maintains the current resilience profile and associated challenges, particularly the consequences of timetable gaps for essential travel and the potential knock-on effects for wellbeing and household costs. It sustains the existing level of isolation risk during disruption and does not materially reduce the day-to-day planning burden. While this may influence patterns of participation for some residents, community resilience continues to be supported by established local networks and ways of living.

11.5.5 Ferry Do Something potentially strengthens resilience and quality of life by providing seven-day coverage, reducing isolation risk and improving the predictability of lifeline access. It supports community sustainability by lowering the practicalities of island living, improving the reliability of supply chains and service access, and enhancing confidence that essential needs can be met without disproportionate delay or expense. Deliverability considerations related to crewing and operational resourcing remain relevant to ensuring that intended benefits are achieved in practice. These improvements should be understood as supporting existing community resilience rather than fundamentally reshaping it. Deliverability considerations related to crewing and operational resourcing remain important to ensuring that intended benefits are achieved in practice.

11.6 ICIA Impact Summary

11.6.1 The scores presented below in **Table 11.1** apply the Assessment Criteria Matrix to each option against the four ICIA themes. It compares Business as Usual (Ske1) with Ferry Do Something (Ske2). The key differentiator is the move to a seven-day timetable under Ske2, which reduces the practical and financial consequences of non-sailing days for a small, remote community with limited on-island services.

Table 11.1: Skerries Interim ICIA Scoring Summary

Assessment theme	Business as Usual		Ferry Do Something
Demographic impacts	0	?	+
	Maintains the current service pattern, meaning non-sailing day gaps continue to constrain flexibility and can reinforce longer-term retention pressures in a small community reliant on mainland access.		Seven-day operation materially improves flexibility and reduces the disruption and cost burden of being unable to return on non-sailing days, supporting retention and reducing inequalities linked to remoteness.
Economic impacts	+	?	+
	Vessel renewal and associated works support continuity and can modestly strengthen the supply chain, but timetable gaps continue to create high consequence delays and a cost premium for service delivery and island needs.		Seven-day services improve supply-chain functioning and reduce delay-related costs for households and service providers, with additional resilience benefits where associated measures protect critical access infrastructure.
Social wellbeing and access to services	0		+
	Access to services remains constrained by non-sailing day gaps, which can lead to extended off-island stays, stress and additional expense when travel does not align with the timetable.		Seven-day services significantly improve access to healthcare and other essential needs by widening travel-day options, reducing unplanned overnight stays and supporting more resilient access during disruption.
Community resilience and quality of life	0		0
	Resilience remains limited by timetable gaps and the high consequence of missed connections, sustaining isolation risk and the planning burden associated with lifeline access.		Improved weekly coverage strengthens resilience by reducing isolation and delay risk, improving reliability of lifeline access for supplies and services, and supporting day-to-day wellbeing and participation.

12 Distribution of Impacts Across Islands

12.1 Do any options risk creating unequal outcomes between different island communities by improving opportunities for some while leaving persistent barriers for others?

12.1.1 Across the programme, the most material distributional issue is the uneven scale of change between island groups, particularly where some routes have fixed link options (or potentially fixed link preferred directions) while others remain reliant on ferry-based improvements. This could lead to a growing difference in "effective accessibility" between areas. In other words, some communities may find it increasingly easier than others to reach jobs, essential services, and social opportunities.

12.1.2 Key potential unequal outcomes include:

- Fixed link versus ferry dependency.
- Fixed links (notably on gateway routes such as Yell Sound, and candidate fixed link islands such as Whalsay and Bressay) could make linked islands functionally comparable to mainland communities through 24-hour, timetable-free access.

12.1.3 Islands that remain ferry dependent could experience a relative disadvantage, particularly if their services continue to involve booking, non-sailing days, or resilience constraints. This is most acute where a non-linked island sits adjacent to or relies on a linked island for onward access, for example Fetlar in relation to North Isles fixed link scenarios.

Gateway effects and "network uplift"

12.1.4 Yell has an explicit gateway role to Fetlar and Unst. Improvements on Yell Sound therefore distribute benefits beyond Yell itself. A fixed link at Yell Sound would reduce the barrier for travel to and from the North Isles more generally, but it could also change comparative outcomes between North Isles communities if complementary measures are not applied consistently.

12.1.5 Similarly, a fixed link at one point in a multi-leg journey can materially improve the overall journey experience, but it can also expose the remaining legs as the "weak link". This can result in uneven benefits if, for example, one island gains a fixed link while another still depends on a constrained ferry leg.

Non-car user and foot passenger equity under fixed links

12.1.6 On routes with a high foot passenger component (particularly Bressay), a fixed link only provides a genuine accessibility uplift if it is matched by a public transport offer that is frequent, affordable and inclusive. Without this, the benefits may skew towards car owners, potentially creating new inequalities for those without access to a car, people who cannot drive, or those who prefer not to drive.

12.1.7 This is also relevant for Whalsay and Yell fixed link scenarios where current connectivity is based on ferry access that allows foot passenger travel. If a fixed link changes the travel model but does not provide an equivalent alternative, some groups may experience reduced accessibility even as overall connectivity improves for others.

Fare policy and affordability differences across islands

12.1.8 Across multiple islands, affordability is a key determinant of whether people travel as often as they need or would like. Options that assume reduced or free resident fares may disproportionately benefit frequent travellers and lower-income households, improving equality of opportunity.

12.1.9 Conversely, fixed links introduce tolling decisions that can redistribute costs. The distributional effects depend on toll level, how concessions apply, and how pricing affects different travel patterns (commuters, families, occasional travellers, freight and service vehicles). Without alignment of fare and toll policy across the network, there is a risk of creating inconsistent affordability outcomes between island communities.

Employment impacts from changes in ferry operations

12.1.10 Some island communities provide crews and employment linked to ferry operations. Where fixed links are considered, discontinuation or scaling back of ferry services could lead to localised job losses or redeployment impacts. This is particularly relevant on Whalsay, where ferry employment is a notable component of the local employment base.

12.1.11 In contrast, islands where the ferry model is deeply embedded as part of the community's operating approach (for example Foula's local flexibility model) could experience adverse impacts if a change in operating model reduces local employment or local control, even where service capability improves.

Service frequency and timetable gaps

12.1.12 For small islands with non-sailing days or highly constrained timetables (for example Skerries and Papa Stour), moving to seven-day operation has a disproportionately positive distributional effect. It reduces the structural inequality of needing additional overnight stays and reduces the time and cost burden associated with accessing essential services.

12.1.13 If these timetable-gap issues persist on some islands while other islands move to very high-frequency or fixed link access, unequal outcomes in day-to-day opportunity could become more pronounced.

12.1.14 Overall, the most significant risk of unequal outcomes arises where a step-change solution (fixed link or very high-frequency "max" service) is implemented for some islands, while others remain subject to structural constraints such as non-sailing days, booking competition, limited resilience during refit, or weak public transport integration.

12.2 How might cumulative impacts across islands reflect differing baseline conditions, capacity constraints or existing socio-economic vulnerabilities?

12.2.1 Cumulative impacts are likely to reflect both the starting point of each island and the interaction between route upgrades across the network. Even if each route decision is justifiable in isolation, the combined effect can amplify inequalities because baseline vulnerability and dependency differ markedly.

12.2.2 Key cumulative considerations include:

- Baseline vulnerability and sensitivity to disruption.

- Small and remote islands are inherently more sensitive to disruption because a single cancellation, non-sailing day or capacity constraint can have multi-day consequences. This means that modest improvements on paper can have large real-world effects, and conversely that leaving baseline constraints unaddressed can compound disadvantage.

- Islands with limited on-island services experience higher dependency on reliable travel for routine needs. Where baseline service access is constrained, the cumulative effect is often higher cost of living (including indirect costs such as time, overnight stays, and service delivery premiums).

Capacity constraints and the compounding effect of connections

12.2.3 On multi-leg journeys, capacity constraints on any one leg can undermine the effectiveness of improvements elsewhere. This is particularly relevant in the North Isles where connectivity is interdependent. If one route improves but another continues to experience booking or capacity pressure, overall accessibility gains may be muted for some communities.

12.2.4 Conversely, if a gateway route improves substantially (for example Yell Sound), cumulative benefits can cascade to other islands by reducing the overall barrier to travel and freight movement. This can be strongly positive, but it also highlights the importance of complementary investment so that non-upgraded legs do not become disproportionate constraints.

Socio-economic vulnerability and who benefits from investment

12.2.5 Where affordability is a key barrier, options that reduce fares or reduce the indirect costs of travel (particularly overnight stays, disruption costs and missed opportunities) are likely to have stronger equity effects for lower-income households.

12.2.6 High car dependence in some island communities means that benefits can concentrate among car-owning households unless public transport integration is strengthened. This is particularly relevant where fixed link options are considered, because a shift from ferry to road access can increase the importance of car availability unless mitigated.

Freight intensity and the distribution of economic uplift

12.2.7 Some routes carry a much larger share of economically significant freight and business travel, so improvements can yield wider economic benefits beyond the island itself. Yell Sound's gateway role and freight intensity means that improvements can support North Isles productivity, supply chains and investment confidence more broadly.

12.2.8 In contrast, islands with low freight demand may see benefits primarily through household affordability and access rather than through large productivity uplifts. This can affect how cumulative economic benefits are distributed across the archipelago.

Place-based change and "rebalancing" effects

12.2.9 Fixed links can change settlement patterns by increasing the attractiveness of certain islands for housing development or commuting. This may generate benefits at the Shetland-wide level, but it can also shift demand and development pressure unevenly, potentially reshaping where population growth, housing delivery and service demand concentrate.

12.2.10 Where islands become effectively "mainland-like", there is potential for services, employment and activity to concentrate further in already well-connected nodes unless deliberate measures are taken to sustain smaller communities.

12.3 Programme-level mitigation and enhancement principles

12.3.1 A distributional narrative is strengthened when it is accompanied by clear principles for avoiding widening inequalities. At programme level, the following principles could be considered without committing to project-specific mitigations:

- Align fare and toll policy to avoid creating new affordability gaps between islands, and to ensure that frequent travellers and lower-income households are not disproportionately disadvantaged.
- Where a fixed link is considered, define an "equivalent accessibility" requirement for non-car users. This should include service frequency, hours of operation, affordability, and accessibility for disabled people and those travelling with children, as well as practical provision for luggage and, where relevant, bicycles.
- Sequence investments so that the most structurally disadvantaged service patterns are addressed early, particularly non-sailing days and capacity constraints that force overnight stays or prevent access to essential services.
- Treat gateway corridors as network systems. Where investment improves a gateway link, plan complementary measures so that dependent islands do not become the residual constraint and experience a widening gap in effective accessibility.
- Recognise and manage island-specific economic and employment dependencies, including the local employment role of ferry operations where services may be replaced or significantly altered through measures such as centralisation.

12.4 Interim ICIA Impact Distribution Summary

12.4.1 **Table 12.1** below provides the overall interim ICIA impact distribution summary.

Table 12.1: Overall Interim ICIA Impact Distribution Summary

Assessment Theme	Option	Bluemull Sound	Bressay	Whalsay	Yell Sound	Foula	Papa Stour	Skerries
Demographic Impacts	BaU	-	-	-	-	0	0	0
	Ferry Do Something	+	+	+	+	? +	? +	? +
	Ferry Do Max	++	++	++	++	/	/	/
	Fixed Link	++	? +	++	++	/	/	/
Economic Impacts	BaU	-	0	-	-	0	+	+
	Ferry Do Something	+	+	+	+	+	+	? +
	Ferry Do Max	++	+	++	++	/	/	/
	Fixed Link	++	+	++	++	/	/	/
	BaU	-	-	-	-	0	+	0

Assessment Theme	Option	Bluemull Sound	Bressay	Whalsay	Yell Sound	Foula	Papa Stour	Skerries
Social Wellbeing and Access to Services	Ferry Do Something	+	+	+	+	0	+	+
	Ferry Do Max	++	++	++	++	/	/	/
	Fixed Link	++	++ ?	++	++	/	/	/
Community Resilience and Quality of Life	BaU	0	0	0	0	0	0	0
	Ferry Do Something	0	0	0	0	0	0	0
	Ferry Do Max	+	+	+	+	/	/	/
	Fixed Link	+	+ ?	+	+	/	/	/

13 Conclusions and Next Steps

13.1 Conclusions

13.1.1 This interim ICIA concludes that the Shetland IITCP has strong potential to improve outcomes for island communities, but that the nature and distribution of benefits will vary significantly by route, by community baseline conditions, and by the inclusivity of the final service offer. The assessment confirms that island connectivity is not only a transport issue, it is a determinant of access to services, employment participation, demographic sustainability, business confidence, and overall quality of life. In most routes assessed, maintaining the current position through Business as Usual is likely to sustain barriers that already contribute to socio-economic disadvantage and access inequalities.

13.1.2 Across the network, incremental ferry-based improvements are generally assessed as beneficial, particularly where they address the most constraining features of current provision such as capacity limits, booking anxiety, timetable gaps and non-sailing days. For the smallest island communities, improving timetable coverage and reducing structural travel gaps is likely to have the most immediate and tangible effect on equality of opportunity across Shetland's island communities because it reduces the need for avoidable overnight stays and improves access to essential services. In the most freight- and gateway-intensive contexts, improved reliability and reduced uncertainty are particularly important, with benefits extending beyond the host island to dependent communities.

13.1.3 The relationship between improved connectivity and demographic outcomes is not direct or deterministic, particularly in smaller and more remote island communities. While enhanced ferry provision can reduce barriers to travel, improve access to employment, education and services, and support the overall attractiveness of island living, demographic change is influenced by a wider set of interdependent factors. These include the availability and affordability of housing, the scale and stability of local employment opportunities, and the social and community environment. In very small populations, such as Fetlar, these structural constraints may remain binding, meaning that improvements in transport alone are unlikely to generate significant population growth. As a result, connectivity enhancements should be understood as enabling or supporting demographic sustainability and retention, rather than driving demographic change in isolation.

13.1.4 Fixed link options have the potential to deliver the largest step-change in access, resilience and economic opportunity by removing ferry dependency and providing continuous access. However, the interim assessment highlights that fixed links also introduce the most significant distributional considerations. The scale of benefit is sensitive to toll affordability and to whether an equivalent, affordable and accessible offer is provided for non-car users. Without these safeguards, fixed link solutions could improve overall access while creating new inequalities for some groups, and could widen comparative gaps between islands that become fixed-linked and those that remain ferry-dependent. The programme should therefore approach fixed link development as a package, combining infrastructure, pricing and inclusive public transport measures.

13.1.5 The interim assessment also concludes that cumulative impacts across islands must be actively managed at programme level. Because baseline vulnerabilities differ and some islands depend on multi-leg journeys, improvements on one route can either unlock broader benefits or expose another route as a residual barrier. Sequencing and coordination across the network are therefore central to avoiding uneven outcomes and to ensuring that improvements in one location do not inadvertently disadvantage another through relative accessibility gaps.

13.2 Next Steps

13.2.1 To progress from interim to final ICIA, the programme should:

- Confirm route-level preferred options and sequencing, including the service specification assumptions that underpin accessibility and affordability outcomes.
- Strengthen evidence on distributional impacts, including tolling and fare scenarios, impacts on non-car households, and how benefits and burdens fall across different islands and groups.
- Provide a more detailed assessment of deliverability risks where benefits depend on staffing, operational resilience, and integration with wider public transport services.
- Use the mitigation principles set out in this interim report to refine option packages early, so that inclusivity and equality of opportunity are designed into the preferred strategy rather than addressed retrospectively.

13.2.2 Overall, this interim ICIA supports the continued development of the IITCP Network Strategy by clarifying where impacts are likely to be most significant, where inequalities may widen without mitigation, and where early interventions can provide the greatest benefit for island communities facing structural disadvantage.

13.2.3 These impact assessments will be iterative and updated, with engagement and liaison with local communities and other stakeholders as appropriate, as work continues beyond the Network Strategy OBC into the development of project-level business cases.