



# Local Development Strategy for Shetland

2014-2020

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## **Executive Summary**

This document forms the Local Development Strategy (LDS) for Shetland for the funding period 2014-2020, and will be used to guide the implementation of the Shetland LEADER Programme and the CLLD element of the European Maritime and Fisheries Fund (EMFF) in this period. This LDS has been developed following extensive community consultation and draws on experiences with previous programmes successfully run in Shetland.

The document provides statistics and information to give a socio-economic overview of the Shetland Islands administrative area, and shows where the strategy fits into the local, national and European policy frameworks, with particular reference to EU 2020, the Scottish Government Economic Strategy and the Shetland Community Plan.

The main body of the strategy is a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis compiled from the results of community and agency consultation exercises undertaken in early 2014, and from discussions with the existing Shetland LEADER Local Action Group (LAG) and Fisheries Local Action Group (FLAG). This analysis shows the main needs and issues that are expected to be addressed by the upcoming Shetland LEADER Programme and local delivery of EMFF, including actions which will mitigate against the negative effects of distance, provide new social and economic opportunities through innovative use of new technology and examine new opportunities for social enterprises, local businesses and community groups to expand and develop.

From the issues raised in the SWOT analysis, a series of objectives and actions have been compiled and these will be used as the framework for implementation of the LDS, which is discussed further in the accompanying Business Plan.



## 1.0 Introduction

1.1 The purpose of this Local Development Strategy is:

- to guide the delivery of the Shetland LEADER Programme 2014-2020 and local delivery of the European Maritime and Fisheries Fund (EMFF) in Shetland,
- to establish a policy framework within which this programme will operate, and
- to provide a set of priorities and objectives which will set out how this programme will be delivered locally and how it will complement existing development strategies.

1.2 A Local Development Strategy (LDS) is a step-by-step process that takes place within a defined area, led by local people, communities and businesses in order to create a vision for a community and an “action plan” to achieve it. Using a method called Community Led Local Development (CLLD) developing an LDS can help local people, communities and businesses decide on the social, economic, environmental and cultural priorities and how to take responsibility for making things happen themselves, improving the self reliance and confidence of the whole community.

1.3 An LDS is a living document and needs to be updated regularly as outcomes are achieved, and new issues arise which need to be discussed with the community.

1.4 An effort is made to show how the objectives described in this document and the intended outcomes integrate with other local, regional, national and EU development strategies. Foremost among these is EU 2020, the ten-year growth strategy for the European Union, and from a national perspective the Scottish Government’s Economic Strategy. Both of these strategies guide the objectives of this document, which also links to the objectives and actions of the Shetland Community Plan, the Shetland Single Outcome Agreement and key local development plans.

1.5 The next few years will be pivotal for Shetland in social and economic terms. The continued contraction of the public sector means that favourable conditions in the private sector need to be expanded upon, and the local charitable and voluntary sector needs to be supported and developed to ensure that new opportunities are created and negative effects are mitigated against, particularly in the context of increases to the already high cost of living in Shetland and the challenges imposed by peripherality and distance. Shetland has to ensure that developments in oil and gas can contribute fully to local wellbeing for an extended period, especially given the current volatility in global oil and gas markets. The very narrow economic base has to be broadened while acknowledging that the fisheries sectors, which contribute around one third of Shetland’s output, remain crucial. The integration of next generation broadband, renewable energy projects and North Sea decommissioning all hold out the prospect of economic and social benefits.

- 1.6 The promotion of Shetland as a forward-looking place to invest in, as a desirable community to live and work in, and as a place with a reputation for high quality goods and services will continue to be a touchstone for economic development. The development of local community initiatives is a crucial to this, as continued reductions in public sector spending require new methods of local service delivery, while carbon reduction continues to be a key part of local development. The stimulation of new rural enterprise opportunities and improved rural services can provide wealth-creating opportunities for future growth and a stronger economy shared more equitably across all communities in Shetland.
- 1.7 The rest of the document provides a background to the Shetland Islands area, the purpose and priorities of the LDS, how local stakeholders were engaged in the strategy development, and a description of priority areas of action for the LEADER and EMFF programmes 2014-2020.



## 2.0 Shetland Islands

### Geography

- 2.1 Shetland is an island archipelago located 211 miles north of Aberdeen and 225 miles west of Bergen, Norway. It consists of over 100 islands and islets, of which 16 are inhabited. A number of these smaller islands are linked to the main island by ferry and/or air services, or by fixed links. Shetland is linked to the UK mainland by ferry and air services.
- 2.2 The map below shows Shetland's position in relation to the UK mainland and Norway:



### Population and Demography

- 2.3 Scotland's Census 2011 estimated that the administrative area of Shetland has a population of 23,167<sup>1</sup> spread across 16 inhabited islands, with the main population and administrative centre of Lerwick home to roughly 7,000 inhabitants. There are no areas in Shetland which would meet the statistical definition of 'urban'<sup>2</sup>.

<sup>1</sup> <http://www.scotlandscensus.gov.uk/ods-web/area.html>

<sup>2</sup> Definition of urban = resident population of 10,000 or more.

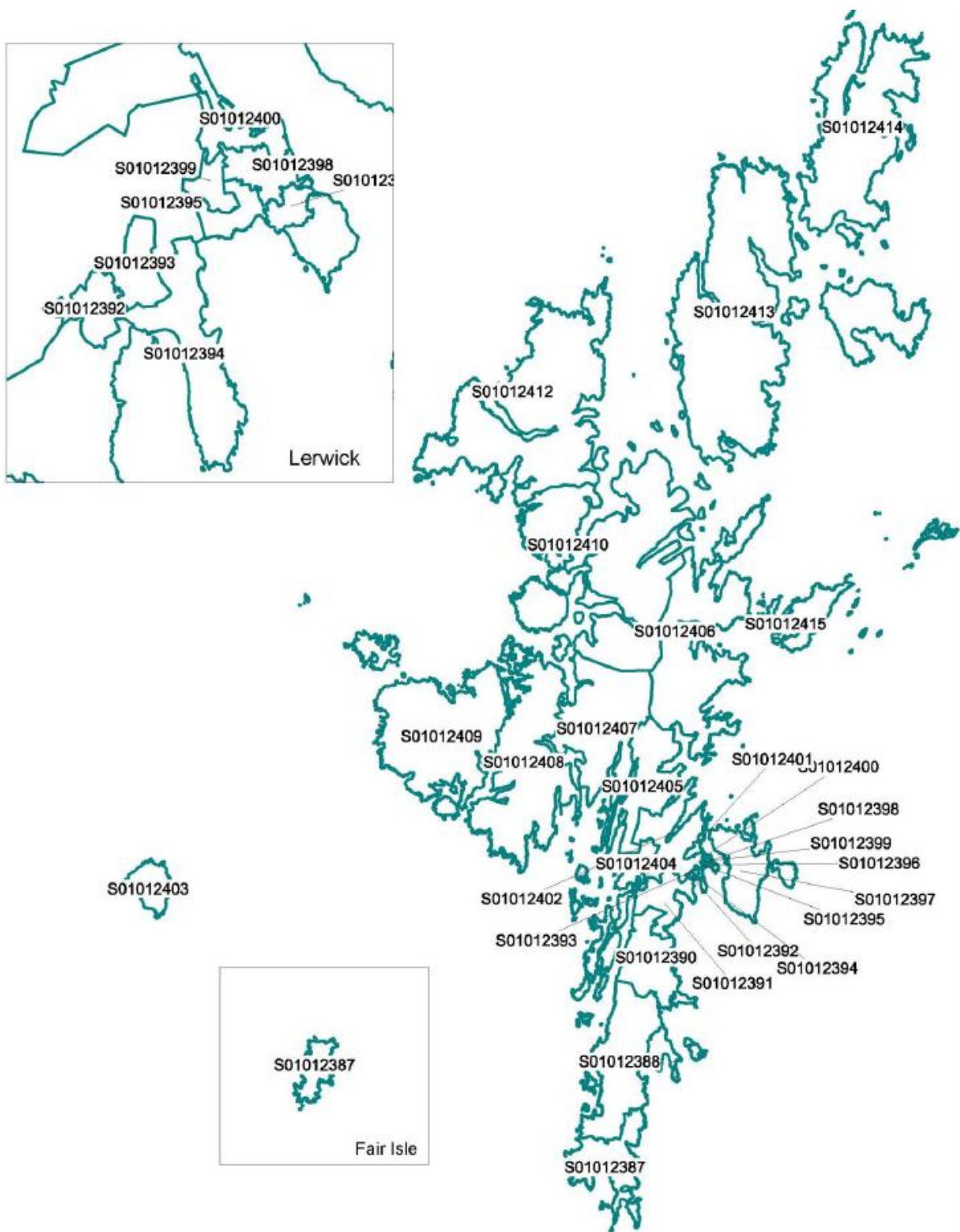
- 2.4 The 2011 Census results showed an increase in the total population of 5.4% since the 2001 Census, and subsequent Mid-Year Population Estimates from the General Register Office for Scotland (GROS) have shown incremental increases. In demographic terms, Shetland's population does not have a large gender imbalance, with the male and female population roughly even.
- 2.5 In terms of age ranges, 17.7% of the population is aged 65 or over, compared to 18.8% aged 15 or under. There is evidence that the population is ageing, as between 2002 and 2013 Mid-Year Population Estimates showed that the proportion of over-65s increased from 14.3% to 17.7%<sup>3</sup>, an increase roughly in line with national trends.
- 2.6 The latest population projections from the General Register Office for Scotland project that, between 2010 and 2035, the overall population of Shetland will increase by 0.5%. Additionally, it is projected that the proportion of over-65s will have increased from 16.9% in 2010 to 31.6% in 2035. In the same period the proportion of under-30s is projected to fall from 34.4% to 28.1%<sup>4</sup>.
- 2.7 Shetland consists of 30 data zones. As an island area, all of these data zones are contained within the administrative area of the Shetland Islands. A list of these data zones by geography and population is attached as Appendix I. A map showing these data zones is attached below:

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<sup>3</sup> <http://www.gro-scotland.gov.uk/statistics/theme/population/estimates/mid-year/2013/index.html>

<sup>4</sup> <http://www.gro-scotland.gov.uk/statistics/theme/population/projections/sub-national/2010-based/index.html>

# Shetland Data Zones



## Economy

- 2.8 The Shetland Regional Accounts/Input-Output Survey 2011 estimated the total output value of the Shetland economy at £1,091.4m<sup>5</sup>. This represented an increase of 26.6% since the previous survey in 2003, when output was valued at £860.5m<sup>6</sup>. Gross Regional Domestic Product (GRDP – defined as the sum of gross profits and wages) was measured at £484.9m, an increase of 19.3% since 2003.
- 2.9 The single largest contributor to output in Shetland is the fishing industry. The combined output of the various fisheries sectors (catching, processing and aquaculture) was valued at £309.7m, equal to 28.4% of total output. Value added in the fisheries sectors was measured at £90.2m, equal to 20.7% of GRDP<sup>7</sup>.
- 2.10 The public sector, including public administration, health, social work and school/college education contributes £205.7m to local output, or 18.9% of total output. Other significant contributors are transportation (£98.8m) construction (£77.7m) and retail (£57.8m)<sup>8</sup>.
- 2.11 The Exchequer Balance is defined as the difference between government revenue raised from businesses and households, and government expenditure on businesses and households. The 2011 Input-Output Study estimated that government expenditure in Shetland in 2010/11 was £216.5m, while revenue raised (in the form of taxation, National Insurance, etc.) was £292.6m, meaning that Shetland is a net contributor to the exchequer, with a contribution measured at £76.1m in 2010/11<sup>9</sup>.
- 2.12 Employment in Shetland is dominated by the public sector. The Shetland Employment Survey 2011 estimated 9,628 full-time equivalent (FTE<sup>10</sup>) jobs in the local economy (13,586 jobs in total, not including itinerant and non-domiciled workers), of which 36.9% were located in the public services. Other significant sectors in terms of local employment are wholesale and retail (9.9%), construction (8.3%) and manufacturing (not including fish processing – 5.5%)<sup>11</sup>.

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<sup>5</sup> Dyer, G. and Roberts, D. *An Analysis of the Shetland Economy Based on Regional Account 2010-11*, p.6

<sup>6</sup> Calculated at 2011 prices.

<sup>7</sup> Dyer, G. and Roberts, D. *An Analysis of the Shetland Economy Based on Regional Accounts for 2010-11*, p.9

<sup>8</sup> Dyer, G. and Roberts, D. *An Analysis of the Shetland Economy Based on Regional Accounts for 2010-11*, p.9

<sup>9</sup> Dyer, G. and Roberts, D. *An Analysis of the Shetland Economy Based on Regional Accounts for 2010-11*, p.43

<sup>10</sup> Full-time equivalent (FTE) = 1 full-time or 3 part-time jobs

<sup>11</sup> Shetland Employers Survey 2011, Shetland Islands Council

2.13 The breakdown of employment by sector from 2011 is as follows:

Sector	FT	PT	FTE
Agriculture	16	14	21
Fish catching	231	217	303
Aquaculture	462	78	488
Oil Terminal	219	1	219
Mining and quarrying	3	6	5
Manufacturing: Fish processing	361	45	376
Manufacturing: Other food and drink processing	60	39	73
Manufacturing: Textiles and crafts	53	74	78
Manufacturing: Engineering	365	24	373
Other manufacturing	42	9	45
Electricity, gas and water supply	84	24	92
Construction	778	63	799
Wholesale & Retail	734	665	956
Accommodation	201	172	258
Catering (incl. Pubs and social clubs)	133	240	213
Transportation, Sea (ports and harbours)	112	20	119
Transportation, Land	191	112	228
Transportation, Air	272	10	275
Oil Supply Services	84	8	87
Communications and Supplier Services (travel agency)	153	91	183
Business services: Financial, real estate	63	25	71
Business services: IT/computer related	24	13	28
Business services; Technical, Professional, other	179	168	235
Public administration – Local/Central	1,834	2,499	2,667
Education	336	280	429
Health	279	540	459
Social work and other services	77	86	106
Other community, social & personal services, recreation	303	414	441
<b>Total</b>	<b>7,649</b>	<b>5,937</b>	<b>9,628</b>

2.14 Figures from NOMIS show that the Jobseekers Allowance (JSA) claimant count in December 2014 was 0.5%, equal to 75 individuals accessing out-of-work benefits. Of these, 15 were aged 18-24, while 10 had been claiming Job Seekers Allowance for over 12 months<sup>12</sup>.

2.15 Scottish Government figures estimate that, at 13.6%<sup>13</sup>, Shetland has the joint highest underemployment<sup>14</sup> rate of all Scottish local authorities (with Dundee City). These two areas form a contrast in that Dundee City has one of the

<sup>12</sup> NOMIS Labour Market Profiles – Shetland Islands, Total JSA Claimants/JSA Claimants By Age Duration Dec 2014; <http://www.nomisweb.co.uk/reports/lmp/la/contents.aspx>

<sup>13</sup> S Rasdale, *Underemployment In Scotland – Employability, Skills and Lifelong Learning Update; Scottish Government*, January 2013

<sup>14</sup> Underemployment is defined as either time-based (individuals not achieving enough hours of employment) or skills-based (individuals working at jobs below their qualifications and/or perceived earning power)

lowest employment rates in Scotland (62.6%) while Shetland has one of the highest (82.4%; 72.5% nationally<sup>15</sup>).

- 2.16 Economic activity figures from NOMIS show that, between October 2013 and September 2014, 88.1% of those aged 16-64 in Shetland were considered to be economically active, compared to an equivalent figure of 77.6% for Scotland and 77.5% for the UK. The figure for those in employment was 82.4%, compared to 72.5% for Scotland and 72.4% for the UK<sup>16</sup>.
- 2.17 NOMIS data shows that average gross weekly earnings in Shetland for full-time workers in 2014 was £519.40, compared to £518.20 in Scotland and £520.80 in the UK<sup>17</sup>. Figures from Shetland Regional Accounts 2011 show that, between 2003 and 2011, average household income rose by 17% from £32,832 to £38,418. However, calculating this in real terms (i.e. adjusting for inflation, recalculating the 2003 value to £40,556), shows that that value of household income fell by 5% in that period<sup>18</sup>.
- 2.18 At the highest level, qualification attainment in Shetland is below the national average – 30% of the working age population are qualified at NVQ4 level or higher, compared to 39.4% for Scotland (although the UK figure is lower at 35.2%). However, a lower proportion of the Shetland working age population is recorded as having no qualifications (9.8%) than Scotland (10.3%) or the UK (9.3%)<sup>19</sup>.

### Cost of Living

- 2.19 A study into establishing a Minimum Income Standard for remote and rural Scotland<sup>20</sup> identified significant differences in the cost of living between certain areas in the UK. The purpose of the study was to establish a minimum acceptable standard of living through survey work, and then to put prices against the 'basket of goods' and other services that go into making up this standard.
- 2.20 The study looked at the cost of specific goods and services in different area classifications, including rural towns, island areas and remote settlements. This demonstrated differing costs for certain items across remote and rural

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<sup>15</sup> NOMIS Labour Market Profiles – Dundee City and Shetland Islands, Labour Supply Oct 2013 – Sep 2014; <http://www.nomisweb.co.uk/reports/lmp/la/contents.aspx>

<sup>16</sup> NOMIS Labour Market Profiles – Shetland Islands, Labour Supply Oct 2013 – Sep 2014; <http://www.nomisweb.co.uk/reports/lmp/la/contents.aspx>

<sup>17</sup> NOMIS Labour Market Profiles – Shetland Islands, Earnings By Residence 2014; <http://www.nomisweb.co.uk/reports/lmp/la/contents.aspx>

<sup>18</sup> Dyer, G. and Roberts, D. *An Analysis of the Shetland Economy Based on Regional Accounts for 2010-11*, p.29-32

<sup>19</sup> NOMIS Labour Market Profile – Shetland Islands, Qualifications Jan 2013 – Dec 2013; <http://www.nomisweb.co.uk/reports/lmp/la/contents.aspx>

<sup>20</sup> *A Minimum Income Standard for Remote and Rural Scotland*, Centre for Research in Social Policy, Loughborough University & Centre for Remote and Rural Studies; University of the Highlands and Islands University Campus Suffolk, April 2013

Scotland, in particular differences between costs in these areas and in urban areas.

- 2.21 The study showed the cost of maintaining the defined acceptable minimum standard of living for a family with two children in the Northern Isles to be, on average, 29% higher than in an urban area of the UK<sup>21</sup>. For a family living in a settlement defined as 'remote from town' this increased to 66% above the UK urban average<sup>22</sup>. For a single person in a 'remote from town' settlement the cost of living was calculated at 74% above the UK urban average<sup>23</sup>.
- 2.22 It is estimated that 40% of households in Shetland are in fuel poverty<sup>24</sup> to some degree, with 13% estimated to be in 'extreme' fuel poverty<sup>25</sup>, a result of the local climate combined with energy inefficient housing, a restricted fuel market (the cheapest type of fuel, gas, is not available in Shetland) and higher fuel costs (contributed to by freight costs).
- 2.23 Research conducted in 2012 showed that Shetland had the highest average cost per litre for road fuel, with unleaded petrol costing 145.9p per litre, compared to the cheapest area (Grampian) where the cost was 129.7p per litre<sup>26</sup>.

### Housing

- 2.24 In 2013 there were 318 house sales in Shetland, with a mean price of £133,715 (compared to a mean price of £162,266 in Scotland)<sup>27</sup>.
- 2.25 There were 71 new private house builds in Shetland in 2013/14; the total number of dwellings in Shetland increased from 10,009 in 2003 to 10,799 in 2012<sup>28</sup>.
- 2.26 There were 30 new build affordable housing completions in Shetland in 2013/14, 22 by the local authority and 8 by Hjaltland Housing Association<sup>29</sup>.

### Community

- 2.27 Shetland is divided into 18 community councils, which play an important role in community decision-making, including input on planning decisions and statutory consultations carried out by the local authority. The largest of these is Lerwick Community Council, which covers a population of roughly 7,000.

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<sup>21</sup> *A Minimum Income Standard for Remote and Rural Scotland*, p.62

<sup>22</sup> *A Minimum Income Standard for Remote and Rural Scotland*, p.63

<sup>23</sup> *A Minimum Income Standard for Remote and Rural Scotland*, p.57

<sup>24</sup> Defined as when energy needs of a household exceed 10% of household budget

<sup>25</sup> Defined as when energy needs of a household exceed 15% of household budget

<sup>26</sup> <http://www.telegraph.co.uk/finance/personalfinance/consumertips/household-bills/9487451/Petrol-postcode-lottery-costs-some-drivers-an-extra-250-a-year.html>

<sup>27</sup> Registers of Scotland; <http://www.sns.gov.uk/AnRep/Analyser.aspx>

<sup>28</sup> Registers of Scotland; <http://www.sns.gov.uk/AnRep/Analyser.aspx>

<sup>29</sup> Shetland Islands Council, Housing, SHSC LA Report

The smallest are Fetlar and Skerries Community Councils, which cover island populations of roughly 70 people each.

- 2.28 Primary school rolls have fallen over the last decade, from 2,124 in 2001 to 1,826 in 2014. Secondary school rolls have matched this slight decline in numbers, from 1,631 in 2001 to 1,400 in 2014<sup>30</sup>.
- 2.29 In 2014, the proportion of school leavers in Shetland leaving to a 'positive destination' (including training, employment and further/higher education) was 94.4%, compared to 92.3% nationally. The proportion entering employment was 41.7% (21.7% in Scotland), while 29.9% entered higher education and 18.1% entered further education (38.6% and 26.3% respectively in Scotland).<sup>31</sup>
- 2.30 Shetland has an active local volunteering base. A recent survey found that there were over 600 community organisations, voluntary groups and social enterprises located in Shetland, and figures from Scottish Neighbourhood Statistics show that 30.5% of adults gave time to volunteer in the community in the previous 12 months<sup>32</sup>.
- 2.31 The Scottish Index of Multiple Deprivation (SIMD) is the Scottish Government's official tool for identifying those places in Scotland suffering from deprivation. It incorporates several different aspects of deprivation, combining them into a single index. It divides Scotland into 6,505 data zones, and the Index provides a relative ranking for each data zone, from 1 (most deprived) to 6,505 (least deprived)<sup>33</sup>. The seven domains in SIMD 2012, used to measure the multiple aspects of deprivation, are:
- Employment
  - Income
  - Health
  - Education, Skills, and Training
  - Geographic Access to Services
  - Crime
  - Housing
- 2.32 In the 2012 SIMD rankings, none of the 30 data zones in Shetland were found in the 15% most deprived data zones in Scotland. Specific aspects of local deprivation become apparent when the results are enumerated by domains of deprivation – 22 of Shetland's 30 data zones are in the 15% most deprived for Geographic Access to Services, and three are in the 15% most deprived for Crime. Those three data zones are all located in the town of Lerwick and environs.

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<sup>30</sup> SIC Children's Services

<sup>31</sup> Shetland Islands Council Community Planning Partnership report, Dec 2014, p.7

<sup>32</sup> Scottish Household Survey, 2009/10; <http://www.sns.gov.uk/AnRep/Analyser.aspx>

<sup>33</sup> <http://simd.scotland.gov.uk/publication-2012/introduction-to-simd-2012/overview-of-the-simd/what-is-the-simd/>



- 2.33 The 2011 Census enables areas to be analysed as relatively deprived under various indicators. The dimensions of deprivation used to classify households are indicators based on four selected household characteristics. A household is said to be deprived in a dimension if it meets the following conditions:
- Employment – a person in the household aged 16 and over who is not a full-time student is either unemployed or long-term sick and disabled
  - Education – no person aged 16-64 in the household has a highest level of qualification of level 2 or above, or no person aged 16-18 is a full-time student
  - Health and disability – any person in the household has ‘bad’ or ‘very bad’ general health, or has a long-term limiting health problem or disability
  - Housing – the household’s accommodation is either overcrowded (with an occupancy rating of -1 or less), is in a shared dwelling or does not have central heating.
- 2.34 Against these measures, the proportion of households in Shetland which are deprived in more than one dimension (21.9%) is lower than in Scotland (27.5%), but is slightly higher when measured by deprivation in only one dimension (34.4% in Shetland, 32.4 in Scotland). A higher proportion of households in Shetland (43.7%) are not deprived in any dimension than in Scotland (40.1%)<sup>34</sup>.

#### Shetland Fisheries Industry

- 2.35 The following section presents statistics on the fisheries sectors in Shetland to place in context priorities and actions relating to local delivery of the European Maritime and Fisheries Fund (EMFF).
- 2.36 Economic output and value added (defined as the sum of gross profits and wages) within the Shetland fisheries sectors are broken down as follows. Growth rates are calculated from 2003 and are based on comparison with adjusted figures<sup>35</sup>:

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<sup>34</sup> [www.scotlandscensus.gov.uk/ods-web/standard-outputs.html](http://www.scotlandscensus.gov.uk/ods-web/standard-outputs.html); table QS119SC

<sup>35</sup> Dyer, G. and Roberts, D. *An Analysis of the Shetland Economy Based on Regional Account 2010-11*, p.6

Sector	Output		Annual growth rate (%)	Cumulative Growth Rate (%)	Value Added (£ million)	Annual growth rate	Cumulative Growth Rate (%)
	£m	%					
<b>Fish Catching</b>	70.1	6.5	7.1	61.9	30.6	0.6	3.9
<b>Aquaculture</b>	156.3	14.3	5.6	46.2	49.5	9.4	87.9
<b>Fish Processing</b>	83.3	7.6	0.7	5.1	10.1	-13.3	-63.2
<b>Combined Fisheries Operations</b>	309.7	28.4	n/a	34.7	90.2	n/a	8.4
<b>Total</b>	1,091.4	100.00	3.5	26.8	484.9	2.3	19.3

2.37 In 2010/11 the total value of exports from Shetland was £496.4m, against a total import value of £365.3m, leading to a positive trade balance of £131.1m. Aquaculture was both the highest exporting sector (£144.1m) and the largest importer (£93.7m). Fish processing and fish catching were the second and third highest exporters, at values of £82.1m and £59.7m respectively. Fish processing was also the second highest importer (£56.9m) while fish catching was responsible for £18.5m worth of imports<sup>36</sup>.

Sector	Imports (£m)	% total imports	Exports (£m)	% total exports	Trade Balance (£m)
<b>Fish Catching</b>	18.5	5.1	59.7	12.0	41.2
<b>Aquaculture</b>	93.6	25.6	144.1	29.0	50.5
<b>Fish Processing</b>	56.9	15.6	82.1	16.5	41.2
<b>Combined Fisheries Operations</b>	169.0	46.3	285.9	57.5	132.9
<b>Total</b>	365.3	100.0	496.4	100.0	131.1

2.38 Employment figures for the combined fisheries sectors are as follows:

Sector	Full-time	Part-time	Total	% total jobs	FTEs <sup>37</sup>	% total FTEs
<b>Fish Catching</b>	231	217	448	3.3	303	3.1
<b>Aquaculture</b>	462	78	540	4.0	488	5.1
<b>Fish Processing</b>	361	45	406	3.0	376	3.9
<b>Combined Fisheries Operations</b>	1,054	340	1,394	10.3	1,167	12.1
<b>Total</b>	7,649	5,937	13,586	100.0	9,628	100.0

<sup>36</sup> Dyer, G. and Roberts, D. *An Analysis of the Shetland Economy Based on Regional Accounts for 2010-11*, p.37-42

<sup>37</sup> FTE = 1 full-time or 3 part-time jobs

## **Fish Catching**

2.39 The caught tonnage and market rates for a number of key species are as follows<sup>38</sup>:

Species	2001		2011		2012	
	Tonnes	£m	Tonnes	£	Tonnes	£
<b>Cod</b>	1,983	3,115,230	2,248	5,742,542	2,051	4,590,059
<b>Haddock</b>	2,880	2,768,423	2,337	3,424,847	3,358	4,355,704
<b>Mackerel</b>	25,374	11,014,650	44,136	56,113,363	28,404	24,169,045
<b>Herring</b>	12,087	2,977,278	9,440	4,608,464	15,925	7,122,604
<b>Whiting</b>	1,206	1,001,226	1,541	2,149,449	1,847	2,286,950
<b>Monkfish</b>	1,325	3,753,661	1,513	6,210,200	1,019	3,920,034

2.40 Figures from the Scottish Government showed that a total of just less than 68,000 tonnes of fish, worth some £60 million, were landed in Shetland in 2012. Of these landings, Shetland fishing vessels accounted for almost 21,000 tonnes (31% of the total) worth £24 million (40%). An additional 58,000 tonnes of fish – most of it pelagic – worth almost £53 million were landed outside Shetland by local vessels. This brings the notional total of ‘Shetland’ fish landings to 126,000 tonnes and £112 million, made up of landings in Shetland plus landings elsewhere by Shetland vessels<sup>39</sup>.

2.41 Scottish Government statistics show that almost one quarter (24%) of all fish landed in Scotland in 2012 were landed in Shetland. This is equal to 19% of all fish landed in the United Kingdom. More fish were landed in Shetland in 2012 than in all of England and Wales<sup>40</sup>.

## **Fish Processing**

2.42 The Shetland Regional Accounts 2011 showed the fish processing sector was the second most valuable sector in Shetland by output, accounting for 7.3% of total economic output, and 69.7% of local manufacturing output.

2.43 Employment in the sector has declined since a high in 2001 of 518 FTE jobs. Figures from the Shetland Employment Survey 2011 showed 376 FTE jobs in the sector.

## **Aquaculture**

2.44 Figures from the Shetland Regional Accounts 2011 showed that the aquaculture sector was the most valuable sector in the Shetland economy, accounting for 14.3% of total economic output, and 51.4% of local primary output.

<sup>38</sup> *Shetland In Statistics 2013*, p. 17; source: Sea Fisheries Management Division Data Team, Marine Directorate

<sup>39</sup> *Fish Landings in Shetland and by the Shetland Fleet in 2012*; Ian R. Napier, NAFC Marine Centre, p.2

<sup>40</sup> *Fish Landings in Shetland and by the Shetland Fleet in 2012*; Ian R. Napier, NAFC Marine Centre, p.4

2.45 The table below shows annual local and national manpower and production figures<sup>41</sup>:

		Staff		Annual Prod. (tonnes)	Prod. (t/man)	Grilse		Pre-salmon		Salmon	
		F/T	P/T			Tonnes	Mean wt. (kg)	Tonnes	Mean wt. (kg)	Tonnes	Mean wt. (kg)
Shetland	1991	202	102	10,614	35	826	2.8	4,322	3.1	5,466	3.9
	1996	209	114	19,710	61	2,042	2.8	8,814	3.9	8,854	4.8
	2001	227	52	39,745	142	4,905	3.7	16,441	4.3	18,269	4.4
	2004	185	27	53,101	250	6,732	4.2	20,543	4.6	25,826	4.5
	2005	162	33	38,946	200	3,424	4.4	16,926	4.7	19,226	4.7
	2006	190	18	39,278	189	3,765	4.3	16,134	4.9	19,379	4.8
	2007	182	25	40,795	197	2,663	4.5	17,838	4.5	20,294	4.9
	2008	202	26	42,593	187	3,970	4.1	13,982	3.9	24,550	4.6
	2009	188	22	43,785	208	4,873	3.3	16,183	4.6	22,664	4.6
	2010	178	23	45,439	226	3,624	4.9	17,179	5.0	24,636	5.3
	2011	189	22	35,439	168	4,611	4.7	16,071	5.1	14,693	4.5
	2012	188	16	43,010	211	6,083	4.3	15,784	4.5	21,143	4.9
	2013	200	13	36,694	172	5,822	4.5	18,121	4.9	12,751	4.7
	2014	-	-	41,525*	-	-	-	-	-	-	-
Scotland	1991	1,014	272	40,593	32	7,449	2.1	13,577	2.6	19,567	3.2
	1996	1,151	242	83,121	60	25,776	3.0	32,222	3.8	24,485	4.5
	2001	1,066	191	138,520	110	42,066	3.8	54,473	4.7	40,754	4.5
	2004	1,019	142	158,099	136	27,710	4.1	58,082	4.5	71,988	4.6
	2005	851	128	129,588	132	22,972	4.1	44,766	4.7	61,850	4.4
	2006	790	81	131,847	151	18,162	4.2	45,937	4.7	67,537	4.7
	2007	798	118	129,930	142	15,811	4.1	45,079	4.5	69,000	4.6
	2008	849	100	128,606	135	15,296	4.1	39,463	4.2	73,631	4.6
	2009	874	89	144,247	150	23,857	4.2	53,764	5.0	66,448	4.7
	2010	944	120	154,164	145	29,733	4.3	56,093	4.9	68,070	5.0
	2011	923	90	158,018	156	35,146	4.6	55,959	5.0	66,606	4.8
	2012	944	115	162,223	153	53,216	4.7	44,528	4.4	64,178	4.9
	2013	992	94	163,234	150	47,496	4.9	58,665	5.0	57,073	5.1
	2014	-	-	162,374*	-	-	-	-	-	-	-

2.46 The figures above show that production in Shetland in 2013 accounted for 22.5% of all salmon production in Scotland, and 19.9% of the salmon farming workforce.

2.47 The table below shows regional production in 2013 by species for Scottish shellfish aquaculture<sup>42</sup>:

Region	Companies	Mussels (tonnes)		Native Oyster (000s)		Pacific Oyster (000s)		Queen Scallops (000s)		Scallops (000s)	
		Table	On-growing	Table	On-growing	Table	On-growing	Table	On-growing	Table	On-growing
Highland	45	1,096	67	369	3,102	0	977	1	0	38	1,470
Orkney	5	0	0	0	0	0	0	0	0	0	0
Shetland	25	4,337	1,148	0	0	0	0	0	0	0	0
Strathclyde	49	796	0	1,503	3,114	260	38	32	1,490	2	0
Western Isles	18	528	66	19	0	0	0	0	0	0	0
Total	142	6,757	1,281	1,891	6,216	260	1,015	33	1,490	40	1,470
Weight (tonnes)		6,757	1,281	151		21		1		5	

<sup>41</sup> Scottish Fish Farm Annual Production Survey 2013; Marine Scotland, p. 25-27

<sup>42</sup> Scottish Shellfish Farm Production Survey 2014; Marine Scotland, p.3

- 2.48 The figures above show that 64.2% of Scottish mussel production (to table) occurred in Shetland, although production of other species is either light or non-existent.
- 2.49 In 2013 there were 71 producing farm sites in Shetland, out of 158 in the whole of Scotland<sup>43</sup>. Employment in Shetland shellfish aquaculture was measured at 88 FTE jobs (not including labour defined as 'casual').

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<sup>43</sup> *Scottish Shellfish Farm Production Survey 2014*; Marine Scotland, p.5

### **3.0 Engagement**

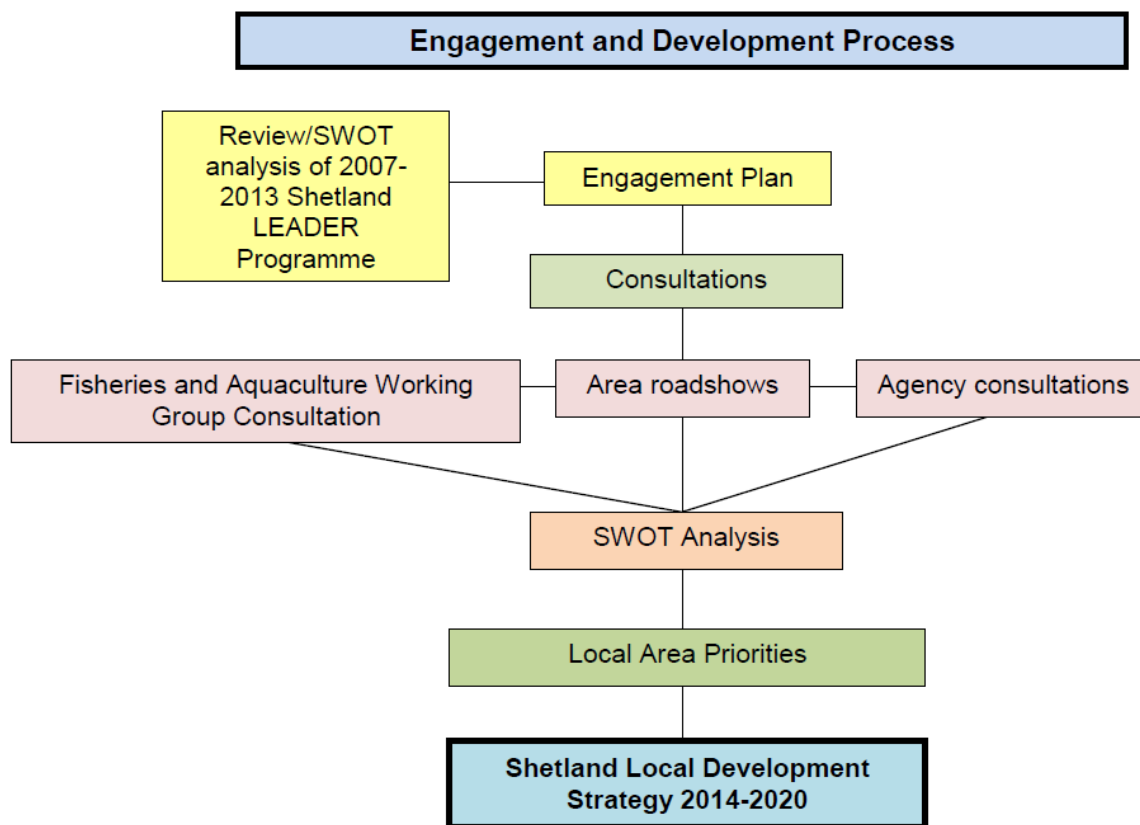
- 3.1 The purpose of the engagement approach agreed by the Local Action Group (LAG) was to:
- Ensure that local groups, organisations and individuals guide the priority areas for action and development in Shetland
  - Agree on the priority areas to guide the implementation of the Local Development Strategy 2014-2020
  - Ensure 'ownership' of the LDS by the LAG, FLAG and local community
- 3.2 The process of developing the LDS began by consulting with the existing LAG with regards to the experience of running the Shetland LEADER Programme 2007-2013. A SWOT analysis of the outgoing programme was drawn up to establish lessons learned and plans were drafted for further consultation with the wider community. This SWOT analysis is attached as Appendix II.
- 3.3 In order to gather information and guidance from the wider community, including community councils, local groups and individuals, it was agreed that the LAG would undertake a series of roadshows in order to promote the achievements of the previous programme, generate discussion on development needs in Shetland and in local areas, and formulate priorities for the 2014-2020 programme. A small LDS Working Group was delegated by the LAG to develop this alongside LEADER staff.
- 3.4 Roadshows were planned in order to ensure a comprehensive geographic spread across the isles, bearing in mind transport difficulties in accessing the most remote islands. Events were advertised in the local media, and information was distributed to community councils. The events were held between 19 February and 13 March 2014, and locations were as follows:
- South Mainland – Levenwick Hall, Levenwick
  - North Isles – Sellafirth Hall, Yell
  - Central Mainland – Bridge End Hall, Burra
  - North Mainland – Voe Hall, Voe
  - West Mainland – Bixter Hall, Bixter
  - Lerwick – Staney Hill Hall, Staney Hill, Lerwick
- 3.5 Each event was attended by members of the LAG and the Shetland LEADER co-ordinator, and local groups or individuals who had received funding through the LEADER Programme 2007-2013 were invited to give short presentations on their projects in order to share their experiences of LEADER and demonstrate what LEADER funding could be used for.
- 3.6 A brochure was produced which showcased previous projects to demonstrate the impact of the LEADER Programme throughout Shetland. This brochure showed the projects which contributed to various community and economic development themes, the various organisations which had developed projects and the lessons learned from the Programme. This brochure was distributed

to interested parties and made available at the public roadshows for information.

- 3.7 Facilitators were present at each event to help generate discussion and to keep notes of points raised. Attendees were encouraged to discuss local and area-wide development needs in the context of any actions that could be generated to address these. Attendees were asked:
- What are your concerns? What matters to you?
  - What needs to change? What improvements would you like to see? What could be done better? (Addressing issues or exploring opportunities.)
  - What good ideas can we build on? (things that are already happening which could be enhanced or extended or things that have happened elsewhere)
  - Ideas about how to make changes happen. Simple things that could make a difference. Project ideas. Who needs to be involved?
- 3.8 The roadshows enabled a wide engagement with the local community, including local businesses, community groups, community councils, individuals and public agencies, which helped to identify key community issues. A summary of the main points and issues discussed at all roadshows is attached as Appendix III. Summary sheets of points raised and main discussion topics at each event are attached as Appendix IV.
- 3.9 In order to ensure that the Local Development Strategy complements local, regional and national development goals, a separate day session was held to which local representatives of public and voluntary/charitable agencies, industry representatives and other local stakeholders were invited to. A summary of the key discussion points at this meeting is attached as Appendix V. This session complemented and built upon previous sessions held with the existing LAG.
- 3.10 In order to develop the key actions and objectives for the FLAG, a similar exercise was carried out with stakeholders from the fisheries and maritime sectors to ensure that FLAG priorities represented key local priorities. Using the previous EFF Axis IV Strategy and Action Plan, the Shetland Seafood Plan, a series of objectives and measures were designed. The community consultation results were also used to guide this as they were intended to generate outcomes and priorities related to fisheries communities. Previous industry SWOTs which focused on the community impacts of the fisheries sectors were also consulted as key reference documents. A summary of this consultation is attached as Appendix VI.
- 3.11 These objectives and measures were developed through consultation with and approved by the Fisheries and Aquaculture Working Group, which is a body made up of industry and agency representatives. These are presented in section 6.

<b>Consultations</b>		
<b>Purpose</b>	<b>Consultee</b>	<b>Date</b>
Lessons from previous Programme	Shetland LEADER Local Action Group  Shetland LEADER Programme 2007-2013 Project Applicants	21 November 2013
Development of public consultation	Shetland LAG Working Group  Shetland LDS Working Group	November 2013 – February 2014
Public consultation – community workshops	Shetland LEADER Programme 2007-2013 Project Applicants  Shetland LEADER Local Action Group  Community Councils  Local stakeholders  General public	19 February – 13 March 2014
Outcomes of public consultation	Shetland LEADER Local Action Group  Shetland LDS Working Group	March – April 2014
Consultation – FLAG	Fisheries and Aquaculture Working Group  Shetland Fisheries Local Action Group	27 August 2014
Outcomes of FLAG consultation	Shetland LDS Working Group	01 September 2014
Refinement of consultation outcomes into LDS priorities	Shetland LDS Working Group  Shetland LEADER Local Action Group  Fisheries and Aquaculture Working Group  Shetland Fisheries Local Action Group	August – September 2014





- 3.12 From these sessions a SWOT analysis was compiled which identifies the key areas in which Shetland is seen to have potential for development and where development may be hampered or non-existent – this SWOT analysis is presented below. The sessions also highlighted key barriers to development in remote areas, and positive baseline areas which may be built on.
- 3.13 In the context of the key LEADER priority area and the areas for development which have been identified, a number of potential projects and initiatives have been identified, covering a broad number of themes, which will form the practical basis for delivery of the LEADER strategy for the programme period 2014-2020.

#### **4.0 Purpose and Priorities of the Local Development Strategy 2014-2020**

- 4.1 The purpose of the Local Development Strategy is to provide a socio-economic context for Shetland, to establish development needs and goals for the local area, to place this into the context of wider EU and national policy, and to identify specific actions and outcomes which will have a demonstrable and measurable impact on the identified development needs.

#### **SWOT - Strengths, Weaknesses, Opportunities and Threats**

- 4.2 To that end, a SWOT analysis has been compiled which has been primarily based on the results of the public consultations held during the roadshows. Results from the consultation held with agencies and LAG members have also been taken into account when compiling the SWOT.
- 4.3 The results of consultation specifically referring to the FLAG are including in a separate SWOT analysis (see section 6).
- 4.4 The results of the SWOT have been analysed and used to develop key aims and objectives for the Local Development Strategy, which are intended to be realised through actions specifically tailored to address concerns raised by the Shetland community at large during the consultation process.

STRENGTHS		
<b>People</b> <ul style="list-style-type: none"> <li>• Low rate of local unemployment</li> <li>• High educational attainment</li> <li>• Lots of experience in local development issues</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• High degree of local volunteering and community engagement</li> <li>• Good network of public facilities, including community halls</li> <li>• Strong network of groups promoting and maintaining local heritage</li> <li>• High degree of experience in developing and managing projects among community groups</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• Strong local identity, including unique creative sector, local food production and Shetland history and heritage</li> <li>• Current growth in local private sector</li> </ul>
WEAKNESSES		
<b>People</b> <ul style="list-style-type: none"> <li>• Ageing population</li> <li>• Lack of opportunities for young people in many areas</li> <li>• High costs of goods and services, particularly personal transport and household heating</li> <li>• Lack of access to services</li> <li>• 'Hidden' poverty and deprivation leads to isolation and difficulties accessing support</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• Public transport – bus timetables often do not suit commuting to certain jobs from remoter areas</li> <li>• Public transport – ferry services have limitations including capacity and sailing times</li> <li>• Broadband and mobile connectivity limited in remoter areas</li> <li>• Fabric of many public buildings, including community halls, in poor state of repair</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• Lack of facilities for visitors in many areas limits tourism development</li> <li>• High cost of living, particularly in areas which are distant from employment centres in Lerwick and Sullom Voe</li> <li>• Continued reliance of community groups and local businesses on public sector grants and contracts</li> </ul>
OPPORTUNITIES		
<b>People</b> <ul style="list-style-type: none"> <li>• Improved partnership working between local services (CAB, Council, learning centres, Shetland Credit Union) to benefit individuals and groups</li> <li>• Better promotion of local services (i.e. Credit Union)</li> <li>• Possibility of local people being employed as development workers in rural areas</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• Development of affordable housing – available land in many remoter areas</li> <li>• Creation of development/regeneration groups to take ideas forward in local areas</li> <li>• LEADER network could provide opportunities for co-operation and knowledge exchange with other areas and groups outside of Shetland</li> <li>• Development of community transport solutions</li> <li>• Development of carbon reduction/energy efficiency projects</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• Local visitors, including yachts in areas with marinas, could provide opportunities for business development</li> <li>• Living Lerwick/BID could focus on sale of local produce and greater promotion of local business</li> <li>• Increased promotion of remoter areas as areas to visit</li> <li>• Use of underutilised or vacant public buildings as community/business assets</li> <li>• Development of local high speed broadband</li> <li>• Network of rural shops and food producers to encourage production and distribution of local produce</li> <li>• Development and utilisation of GPS-based apps to provide information and promotion of local services</li> </ul>
THREATS		
<b>People</b> <ul style="list-style-type: none"> <li>• Welfare reform is likely to have negative impacts on those already subject to higher living costs</li> <li>• Lack of internet/mobile connectivity outside centres could lead to individuals being unable to access certain services, including job applications and benefits</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• Volunteer fatigue, particularly through increase of legislation and bureaucracy leading to frustration with 'red tape'</li> <li>• Shetland Islands Council budget cuts affecting local services and support for community groups and businesses</li> <li>• Local groups struggling financially</li> <li>• Increasing centralisation of services to Lerwick and away from other areas</li> <li>• State of repair of public buildings may limit usage and lead to unsupportable costs for local committees</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• Depopulation of local areas leading to closure of businesses such as rural shops</li> <li>• Lack of employment opportunities outside main employment areas</li> <li>• Larger companies and online affecting local businesses</li> </ul>

4.5 Based on the information contained in the SWOT the following overarching aim for the Shetland Local Development Strategy 2014-2020 has been agreed:

- Supporting stronger communities, individuals and organisations through promoting social inclusion, poverty reduction and economic development

4.6 Actions and objectives under this Local Development Strategy will aim to deliver outcomes which address locally identified priorities in a manner which also delivers on the key RDP priority for LEADER. This will be achieved by encouraging the development of projects, actions and initiatives which contribute to the following objectives:

- Support communities to develop projects which address carbon reduction and energy saving
- Develop and enhance services and facilities which support a high quality of life in rural communities
- Enhance the natural and cultural heritage of Shetland, and improve tourism and leisure opportunities in local areas
- Encourage community initiatives which develop food and drink projects in rural areas
- Provide rural communities with the means and opportunity to address issues of disadvantage and inequality
- Encourage co-operation and experience-sharing with rural areas located elsewhere in Scotland, the UK and Europe
- Ensure sustainable development of areas of importance to the local fisheries sector (FLAG)

Specific actions which the Local Development Strategy will aim to generate through the above objectives are detailed in section 5.

4.7 The LAG has agreed that the following will be target groups for benefits and opportunities developed through target actions under the LDS:

- Social enterprises
- Micro businesses
- Young people

## 5.0 Priority Actions and Targets

- 5.1 It is crucial that Local Development Strategies reflect the expected outcomes of engagement with businesses and communities, as well as demonstrating how locally identified priorities reflect the priorities of general EU policy and specific programmes.
- 5.2 Proposals set out how local development strategies will meet one or more of the six rural development priority areas in order to support innovation and capacity building. For LEADER purposes the key priority is to promote “social inclusion, poverty reduction and economic development.”
- 5.3 Rural development proposals also set out key areas for action under the above priority which local development strategies must demonstrate that they address. This section lays out the key areas for action and proposals for how the Shetland Local Development Strategy 2014-2020 will address these. Targets against which these actions will be measured are also included.
- 5.4 The purpose for highlighting these priorities and actions is to ensure that the LEADER programme is used to support projects where there is a clear need locally and an identified fit with the activities and policies of community partners. The actions below are all areas where there is the potential to use resources available to partners alongside the LEADER Programme to ensure quality projects which deliver on local development needs identified in the SWOT.
- 5.5 Support communities to develop projects which address carbon reduction and energy saving

Carbon reduction is a key theme at all levels of local policy, and projects which reduce reliance on fossil fuels have the potential to contribute to this theme and to deliver benefits across local areas, including economic and health benefits. This theme complements a range of local policies and actions taken forward by agencies and community groups, including car-sharing initiatives and local food production to reduce travelling distances, and aerogenerators linked to community buildings. Intervention from LEADER can assist groups and agencies in the development of initiatives, physical infrastructure and research into reducing carbon emissions locally. There is also clear potential for co-operation projects which encourage knowledge-sharing and development of new techniques.

### Actions

- Provide support to community groups and voluntary organisations to investigate and implement energy saving solutions for community buildings
- Provide funding for incentive schemes which encourage community groups to pursue renewable energy and energy saving measures

- Support research & development and knowledge transfer with regards to implementation of renewable energy technology
- Support programmes and projects which reduce the need for long car journeys and provide innovative, low-carbon solutions for community transport
- Support community initiatives which investigate and/or implement innovative recycling and waste management solutions in local communities

### Targets

- 3 feasibility studies which examine new carbon reduction techniques
- 4 projects which provide energy saving solutions for community buildings
- 2 projects which reduce the local carbon footprint through reducing transport emissions
- 2 projects which increase the installed capacity of renewable energy locally

## 5.6 Develop and enhance services and facilities which support a high quality of life in rural communities

Previous LEADER programmes operated in Shetland have been very successful in supporting community ambitions to develop facilities in local areas, and have been able to provide assistance where there are gaps in what public agencies can support, which is more prevalent in times of budgetary cutbacks in local government. Cutbacks of this kind often disproportionately affect more remote and rural communities, as economies of scale mean that services in these areas are more expensive to deliver and are often the first to be cut when budgets are under pressure. Maintaining the quality of life in rural communities is important in stemming the deleterious effects of such cuts and ensuring that communities remain vital and attractive places to live. To this end, LEADER can fill gaps by providing support and assistance to groups aiming to enhance services and facilities in ways which provide lasting benefits.

### Actions

- Support community efforts to connect remote and sparsely populated areas to high speed broadband, and to improve telecommunications connectivity overall
- Promote opportunities for skills development and learning experiences in rural communities

- Support research and feasibility studies examining the potential for community asset transfers and medium- to large-scale commercial developments by community groups
- Encourage programmes and projects which lead to decentralisation of public services and improve employment opportunities in remote areas
- Support community efforts to enhance local facilities and services by finding use for disused or underutilised local assets
- Support projects which seek to improve local opportunities for young people, in particular skills and learning opportunities, leisure and recreation and employment/business opportunities
- Support social enterprises to develop revenue generating projects which enhance the quality of life in rural areas and add to local service provision
- Support projects which aim to improve the ability of disadvantaged and/or vulnerable people to play a more active role with their community
- Encourage programmes which aim to give communities a more active role in local and regional economic and community development
- Support projects and initiatives which aim to reduce barriers to employment and community participation (i.e., childcare, transport, intergenerational skills etc.)

### Targets

- 6 projects which utilise telecommunications technology to mitigate against the effects of distance and peripherality
- 3 projects which find uses for under-utilised public and/or community assets
- 5 projects which generate revenue streams for social enterprises
- 4 projects which enable disadvantaged and/or vulnerable individuals to play a more active role within their community

### 5.7 Enhance the natural and cultural heritage of Shetland, and improve tourism and leisure opportunities in local areas

Shetland's natural beauty and cultural resources offer great potential for social and economic development, and also require efforts to preserve and enhance those elements which are at risk of loss or deterioration, but which remain of great value. In many cases the cultural and social value of such assets will outweigh any economic benefits which can be accrued, which often puts

projects in this area at a disadvantage where resources are required. LEADER can fill gaps in this area where projects fit with local priorities but resources are scarce, or where partners are focused on other areas of development.

### Actions

- Develop programmes which improve interpretation of and access to important areas of natural beauty and scientific and/or historic interest
- Develop initiatives which implement new methods of preserving Shetland's pristine natural environment
- Support developments which provide information bases for local tourism and improve the ability of local communities to develop visitor services
- Contribute to the development of projects which utilise, develop and preserve the uniqueness of Shetland's cultural heritage, including dialect, history, music, and textiles
- Improve information on local amenities and services available to visitors to encourage tourism in all areas of Shetland
- Support projects and initiatives which aim to encourage wider participation in sporting activity, which encourage healthier and more active living, and which increase the number of leisure and recreation opportunities available in Shetland

### Targets

- 4 projects which provide new interpretation and/or access measures for local natural and built heritage
- 3 projects which build on or utilise Shetland's cultural heritage

## 5.8 Encourage community initiatives which develop food and drink projects in rural areas

Supporting local food and drink production can have a number of tangible benefits for communities and Shetland as a whole. Developments in this area have the potential to reduce travelling distances and time, thus reducing carbon emissions. Such developments can also provide economic benefits for community groups and individuals who can sell produce, businesses who can cut down on charges and attract new custom, and individuals who can procure fresh local produce in local shops. While these are areas of interest to local and regional policy, resource direction often means that groups requiring assistance with developing projects fall through gaps in provision. LEADER can offer valuable support for such groups.



### Actions

- Support research into wider usage and distribution of locally produced food to local suppliers and eateries
- Support initiatives which lead to efficient community-led food production and reduction of carbon footprint
- Support networking of local producers to look at new methods of production, distribution, selling and marketing

### Targets

- 3 projects which increase food and drink production within local communities

## 5.9 Provide rural communities with the means and opportunity to address issues of poverty, disadvantage and inequality

A major policy direction in the current programme is to address issues of poverty and social exclusion, which is a key aspect of local development policy. This a particular issue for rural areas where poverty and exclusion may be a result of physical distance and local geography as much as prevailing economic conditions. While budgets are under pressure it is essential that work in this area is supported by as much resource as possible, including LEADER, to ensure that projects which deliver real benefits are properly supported by community planning partners.

### Actions

- Support projects which generate employment opportunities in remote and rural areas, particularly where these benefit disadvantaged and/or vulnerable members of the community
- Assist communities with preparatory, survey and analysis work to support the creation of local development plans which focus on economic development and regeneration
- Support initiatives which provide innovative and sustainable solutions to issues of poverty and inequality affecting households, i.e. fuel poverty, welfare reform, family learning, household budgeting, etc.
- Encourage projects which aim to increase employability skills among women, young people and individuals who are vulnerable or disadvantaged
- Develop initiatives which seek to encourage community participation among those who may otherwise be excluded

- Provide funding for research and/or feasibilities into new solutions to increase community sustainability, i.e. new housing or transport solutions
- Provide support for the creation of online portals and/or social networking hubs to promote communities as places to live, work, study and invest
- Support projects which seek to improve the ability of young people to become involved in local decision-making

### Targets

- 4 projects which contribute to greater employment opportunities in remoter areas
- 3 projects which aim to develop skills levels among young people
- 3 projects which contribute to regeneration and economic development plans in local communities

#### 5.10 Encourage co-operation and experience-sharing with rural areas located elsewhere in Scotland, the UK and Europe

LEADER can provide a method by which partners in local areas can develop and deliver projects which share knowledge, research, techniques and insights across a range of rural development projects. These can be joint research projects, experience-sharing, new initiatives or linking organisations developing new methods of best practice. It has been agreed that 10% of the LEADER budget will be provided to projects which are developed through co-operation with other LAG areas.

### Actions

- Develop programmes which investigate innovative use of land and assets in light of Common Agricultural Policy review
- Investigate opportunities to establish networks of co-operation between remote and rural areas to improve natural and built heritage conservation, tourism development, marine resource management and area promotion
- Support efforts to improve knowledge and understanding in key local sectors (i.e. agriculture, creative industries, new technology) through sharing or experience and methodology in other LAG areas
- Investigate opportunities to improve local service provision through co-operation

## Targets

- 2 projects which aim to increase knowledge and understanding in defined sectors through co-operation with other Local Action Groups/LEADER programmes

### 5.11 Ensure sustainable development of areas of importance to the local fisheries sector (FLAG)

This objective of the LDS is covered by the Fisheries Local Development Strategy 2014-2020, which contains a discrete action plan and series of objectives. Priorities and actions for this objective are discussed separately in section 6.

## **Small Business Support**

5.12 It has been agreed by the Scottish Government that an amount equal to 10% of the LEADER budget will be provided to develop small businesses in Shetland. Through the LAG this support will be distributed to small businesses, either individually or collaboratively, where it can be demonstrated that development projects being undertaken will contribute to the priority actions identified in the LDS and meet the key eligibility criteria for support detailed in the Business Plan.

5.13 The following will be eligible for support:

- Local small, medium or micro-sized enterprises
- Trade or representative organisations
- Collaborative or co-operative groups of businesses, either locally or regionally
- Social enterprises

5.14 The first point-of-contact to access this support locally will be the local Business Gateway service, which will refer suitable projects to LEADER Project Staff at an appropriate point in the consultation process, if there is a potential fit with LDS priorities. Applicants to small business support under LEADER will be expected to make use of business development interventions available through Business Gateway where required.

## **Agricultural Diversification**

5.15 A further 10% of the LEADER budget will be directed towards projects which contribute to the diversification of agricultural activity or holdings in Shetland. This will be assessed using the eligibility criteria detailed in the Business Plan and will be based on the contribution to the LDS priority actions.

## **6.0 Fisheries Local Development Strategy**

- 6.1 It is crucial that Fisheries Local Development Strategies reflect the expected outcomes of engagement with businesses and communities, as well as demonstrating how locally identified priorities reflect EU policy and specific programmes.
- 6.2 This section lays out the key areas for action and proposals for how the Shetland Fisheries Local Development Strategy 2014-2020 will address these. These have been developed from the above Fisheries SWOT analysis which was compiled through consultation with the community, representatives of the fisheries sector and relevant agency representatives.
- 6.3 The purpose for highlighting these priorities and actions is to ensure that EMFF is used to support projects where there is a clearly defined need locally and the potential for the CLLD approach to add value to local activity. The actions below are all areas where there is the potential to use resources available to partners alongside EMFF to ensure quality projects which deliver on key local priorities, and where co-operation with other FLAG areas may be essential to develop regionally focused projects which add value to sectors and communities.

### **Strengths, Weaknesses, Opportunities and Threats – SWOT**

- 6.4 In order to develop priority objectives and actions directly related to the development of local fisheries communities, a separate SWOT analysis was compiled from consultations with local industry representatives and agencies, industry-focused research, and with reference to the SWOT compiled from community consultation. The Fisheries SWOT is presented below:

**SHETLAND FISHERIES LOCAL DEVELOPMENT STRATEGY 2014-2020 – SWOT ANALYSIS**

**STRENGTHS**

<b>People</b> <ul style="list-style-type: none"> <li>• High quality of maritime expertise</li> <li>• High degree of local volunteering</li> <li>• High local quality of living</li> <li>• Knowledgeable and experienced local workforce</li> <li>• History of innovation</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• Rich and varied coastline with wildlife and scenery which attracts international interest</li> <li>• High quality marine wildlife, bio-diversity and environment well protected by national and local regulatory framework</li> <li>• Local areas attractive for residents and visitors</li> <li>• Rich local culture and heritage</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• NAFC Marine Centre provides a resource to build capacity in service delivery and sectoral development</li> <li>• Strong track record of local fisheries industry</li> <li>• Economic activity around main ports is significant and export oriented</li> <li>• Strong 'Shetland Brand' attached to fisheries produce</li> <li>• Strong history of partnership working</li> </ul>
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**WEAKNESSES**

<b>People</b> <ul style="list-style-type: none"> <li>• Decline of traditional skills and skills retention</li> <li>• Ageing population</li> <li>• Centralisation of jobs and population</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• Need for regeneration in many areas</li> <li>• High cost of living</li> <li>• Geographic distance from main markets (inc. internal transport routes from sites in remoter areas)</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• Variable quality of local infrastructure</li> <li>• High rate of SMEs and low rate of new business starts</li> <li>• Lack of niche market capitalisation</li> </ul>
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**OPPORTUNITIES**

<b>People</b> <ul style="list-style-type: none"> <li>• Reskilling to meet changing market needs</li> <li>• Retain transferable skills while maintaining traditional skills</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• Environmental protection methods to ensure long-term sustainability, i.e. to protect against natural disasters</li> <li>• Maintenance of working harbours and high quality local knowledge</li> <li>• Alternative uses for small harbours</li> <li>• Promotion of areas</li> <li>• Increased involvement and commitment through community development and partnership working</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• Diversification into high value markets and sectors</li> <li>• Increased use of coastal assets for economic development, i.e. tourism</li> <li>• Publicity efforts related to marine environment and economy</li> <li>• Develop niche markets</li> <li>• Collaborative activities with other areas and sectors</li> <li>• Collaboration with education and research to improve standards across all industry sectors</li> <li>• New economic opportunities through development of harbour facilities and infrastructure</li> </ul>
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**THREATS**

<b>People</b> <ul style="list-style-type: none"> <li>• Skills gaps</li> <li>• Job opportunities in other sectors leading to workforce leaving industry</li> <li>• Lack of young people in industry leading to imbalance</li> </ul>	<b>Community</b> <ul style="list-style-type: none"> <li>• Increasing sense of fishing communities becoming commuter areas</li> <li>• Increasing cost of living</li> </ul>	<b>Economy</b> <ul style="list-style-type: none"> <li>• High transportation costs impacts on profitability</li> <li>• Future political/legislative changes</li> <li>• Lack of investment</li> <li>• Lack of public sector match funding for development projects</li> <li>• Competition for available land, workforce and investment capital from other sectors</li> </ul>
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## Priority Actions – Fisheries LDS

### 6.5 Add value, create jobs and promote innovation at all stages of the fisheries and aquaculture seafood supply chain

Adding value is key to ensuring the ongoing sustainability of the local fisheries industry and the communities and businesses which rely on it in the face of increasing challenges. This measure will seek to encourage projects which will look at the sector in an innovative way and seek to deliver new solutions to existing challenges, or will seek to create new opportunities for development, while maintaining the reputation for high quality and standards which the Shetland seafood industry has cultivated.

#### Actions

- Support programmes and projects aimed at improving data collection at all levels of the supply chain
- Support projects which examine new carbon reduction techniques within the fisheries sectors
- Support projects which lead to improvements in quality and traceability across the marine food sector
- Support projects which seek to enhance and/or increase understanding of the marine environment and species management, in the context of economic development
- Develop projects which help to improve industry standards, particularly where these seek to improve the health of the marine environment and local best practice with regards to production processes
- Develop projects which increase utilization of by-catch in line with the discard ban, including improving linkages between catching and processing outside the human food chain and develop market demand for certain species

### 6.6 Support diversification within the fisheries and aquaculture sectors

It is essential that the local seafood sector be able to maintain sustainability, and create the potential for expansion, by diversifying activities. Successful and well-planned diversification will mitigate against many of the challenges faced by the industry, such as over-reliance on certain markets or production methods, fluctuations in particular market areas and the impacts of legislation. Diversification can also open up opportunities for the development of new skills, undertaking valuable research and the ability to enhance or repurpose existing assets.

## Actions

- Investigate, develop and access new, higher value markets for fisheries products
- Support research & development and knowledge transfer with regards to implementation of new reference testing methods for shellfish
- Encourage research into new production methods, biological research and new technology
- Support projects which aim to promote cross sectoral links between sustainable fisheries and other areas of the local economy, including retail and tourism
- Support projects and initiatives which will diversify the use of assets and infrastructure in fisheries areas, and to utilise the marine environment to pursue activities in areas where fisheries activity is no longer present
- Support community efforts to enhance local facilities and services by finding use for disused or underutilised local assets

### 6.7 Support lifelong learning and job creation in fisheries areas

Provision of new skills and/or the repurposing or transference of existing skills can have a positive impact on local industry and the economic health of local communities. This can help to maintain the sustainability of industry while ensuring a high quality and rewarding working environment for the local labour force, ensuring that high standards of production are maintained and that challenges and opportunities which arise from new sectoral and market needs can be met. The preservation of traditional skills is also important in maintaining a sense of local identity in a globalised market and providing a link to other areas of local culture and heritage.

## Actions

- Encourage projects which look to reskill local workers in response to changing sectoral and market needs
- Support projects which find avenues for the use of traditional skills and encourage development of skills which may be transferable
- Support projects which seek to improve local opportunities for young people, in particular skills and learning opportunities, leisure and recreation and employment/business opportunities

## 6.8 Strengthening the role of fisheries communities in local development and the governance of local fisheries resources

A key challenge for an area such as Shetland is distance, not only from key markets, but from key decision-makers. This can lead to a feeling in local sectors that their industry is not under their control and that centralised decisions are made without due appreciation of local factors and issues. This measure seeks to improve opportunities within communities for meaningful decisions to be taken on local developments, and to improve the capacity of those communities to implement such decisions. This measure also seeks to improve local governance of fisheries resources by increasing the capacity for resource management.

### Actions

- Support projects which improve local marine resource management
- Investigate opportunities for research and development which are appropriate and beneficial to local industry and have the potential to develop skills and employment opportunities
- Encourage the development of local initiatives which provide community groups with decision-making powers, such as participatory budgeting



## 7.0 Implementation

- 7.1 This Local Development Strategy has been drawn up following the preparation process which covered consultation with local communities, agencies and industry. The SWOT analysis and resultant priority activities were drawn up following this process, and an agreed method of implementation formulated. The implementation of the strategy is described in the Business Plan.
- 7.2 The agreed method of delivery for the objectives of the LDS will be the Local Action Group model. This will be the decision-making body for distribution of all funds originating from the European Agricultural Fund for Rural Development (EAFRD). This is an approach which was successful in administering funds from the 2007-13 programme and will be adopted for delivery of the 2014-20 programme with some amendments.
- 7.3 The membership of the LAG will be comprised of partners with a range of skills and experience in areas which the LDS considers to be priorities for development. Membership of the existing LAG will be reviewed to ensure balance between the public and private sectors and identify gaps where other local agencies may be able to provide input through membership. Details of individual members and organisations are included in the Business Plan.
- 7.4 For all funds originating from the European Maritime and Fisheries Fund (EMFF) decision-making will be undertaken by a separately convened Fisheries Local Action Group (FLAG). For the 2007-2013 programme, the FLAG was operated as a *de facto* sub-group of the LAG, with certain members of the LAG with specific interest in fisheries and/or the marine environment invited to participate.
- 7.5 Public agencies, local organisations, individuals and industry representatives will be invited as members on the basis that they will offer expertise and a development perspective on the following areas of local concern:
- Economic development
  - Community regeneration
  - Public administration
  - National and European policies and programmes
  - Natural heritage
  - Built heritage
  - Sports, leisure and recreation
  - Community safety
  - Arts and culture
  - Skills and training
  - Local business/enterprise
  - Social enterprises
  - Vulnerable individuals
  - Young people

- 7.6 Shetland Islands Council will act as the Accountable Body for the LDS and the LAG/FLAG, and this will be formalised via a Service Level Agreement which will confer delegated authority on the Council, via the LAG and/or FLAG, to disburse funds from EAFRD and EMFF to approved projects. The Council will act as the Payment Authority and this will be monitored by the Council's Internal Audit service.
- 7.7 The responsibilities and obligations upon both the Accountable Body and the LAG will be agreed and clarified by the signing of a Memorandum of Understanding by both parties.
- 7.8 The table below shows potential interventions towards priority areas through LEADER/EMFF and potential sources of advice and/or funding to develop these:

LEADER/EMFF Priorities	Possible Interventions	Complementary advice and/or funding
Social enterprises	<ul style="list-style-type: none"> <li>• Feasibility Studies</li> <li>• Capacity building</li> <li>• Research and development projects</li> <li>• Pilot projects</li> <li>• Targeted schemes</li> <li>• Asset development and transfers</li> <li>• Capital projects</li> </ul>	<ul style="list-style-type: none"> <li>• Business Gateway</li> <li>• Highlands and Islands Enterprise</li> <li>• Charitable Trusts</li> <li>• Voluntary Action Shetland</li> <li>• Shetland Islands Council</li> <li>• Skills Development Scotland</li> <li>• National Lottery</li> <li>• Community Energy Scotland</li> </ul>
Micro businesses	<ul style="list-style-type: none"> <li>• Networking and partnership support</li> <li>• Research and development</li> <li>• Promotional activities</li> <li>• New product/market development</li> <li>• Carbon reduction</li> <li>• Targeted schemes</li> </ul>	<ul style="list-style-type: none"> <li>• Business Gateway</li> <li>• Highlands and Islands Enterprise</li> <li>• Shetland Islands Council</li> <li>• Skills Development Scotland</li> <li>• Federation of Small Businesses</li> <li>• Private sector representative organisations</li> </ul>
Young people	<ul style="list-style-type: none"> <li>• Networking and co-operation</li> <li>• Rural facility development</li> <li>• Improved connectivity</li> <li>• Increased opportunities in rural areas</li> </ul>	<ul style="list-style-type: none"> <li>• Business Gateway</li> <li>• Shetland Islands Council</li> <li>• Charitable Trusts</li> <li>• Voluntary Action Shetland</li> </ul>
Agricultural diversification	<ul style="list-style-type: none"> <li>• Feasibility and research projects</li> <li>• Co-operation and networking</li> <li>• Capital projects</li> <li>• New product/market development</li> <li>• Promotional activities</li> <li>• Experience-sharing</li> </ul>	<ul style="list-style-type: none"> <li>• Business Gateway</li> <li>• Shetland Islands Council</li> <li>• Crofters Commission</li> <li>• Scottish Natural Heritage</li> </ul>
Encourage co-operation and experience-sharing with rural areas located elsewhere in Scotland, the UK and Europe	<ul style="list-style-type: none"> <li>• Networking and facilitation</li> <li>• Ideas exchange and experience-sharing</li> </ul>	<ul style="list-style-type: none"> <li>• Other LAGs and FLAGs</li> <li>• Local authorities</li> <li>• Scottish Enterprise/HIE network</li> </ul>
Ensure sustainable development of areas of importance to the local fisheries sector	<ul style="list-style-type: none"> <li>• Diversification of products, markets and facilities</li> <li>• Job creation and skills development</li> <li>• Enhancing local governance and control</li> </ul>	<ul style="list-style-type: none"> <li>• Shetland Islands Council</li> <li>• Marine Scotland</li> <li>• Private sector representative organisations</li> </ul>

- 7.8 The figure below shows the key stages where the CLLD approach will be implemented to ensure that the LDS has the intended positive impact on the Shetland community:

### Strategic Objectives

- Carbon reduction and energy saving
- Enhance rural services and facilities
- Enhance natural and cultural heritage; improve tourism and leisure opportunities
- Develop rural food and drink projects
- Address issues of poverty, disadvantage and inequality
- Co-operation and experience-sharing
- Sustainable development of fisheries communities

### Impacts

- Economy – improved and enhanced local economic development
- Community – stronger communities through greater social inclusion
- People – poverty reduction and improved quality of life

### Inputs

- Animation/facilitation
  - Working with communities to identify actions
  - LAG co-ordination with other services and supporting agencies
  - Building capacity
  - Assisting with project development and applications
- LEADER funding/investment
- Project development expertise

Actions	
Participation	Activities
<ul style="list-style-type: none"> <li>• Community groups and clubs</li> <li>• Local businesses and social enterprises</li> <li>• Development agencies</li> <li>• Individuals</li> <li>• Private sector associations</li> <li>• Voluntary and charitable organizations</li> <li>• Public agencies</li> <li>• Other LAGs and FLAGs</li> </ul>	<ul style="list-style-type: none"> <li>• Projects based around strategic objectives and local aspirations</li> </ul>

Outputs and Outcomes		
Outputs	Project Outcomes	LAG Outcomes
<ul style="list-style-type: none"> <li>• Research and innovation</li> <li>• Diversification in rural areas</li> <li>• Increased opportunities/access for women and young people</li> <li>• Co-operation</li> <li>• New and improved access to services in rural areas</li> </ul>	<ul style="list-style-type: none"> <li>• Increased community capacity</li> <li>• Improved skills and opportunities</li> <li>• High quality local services</li> <li>• Added value to local economy</li> <li>• Improved infrastructure</li> <li>• Diversification of rural economy</li> <li>• Improved quality of life</li> </ul>	<ul style="list-style-type: none"> <li>• Value for money</li> <li>• Strengthen private, voluntary and charitable sectors</li> <li>• Added value to local strategies and plans</li> <li>• Diversification of local activity</li> <li>• Increase community involvement in decision-making</li> </ul>

### LDS 2014-2020 - LAG and FLAG CLLD

- Innovative, flexible and representative
- Transparent and accountable
- Responds to community needs and aspirations
- Strengthens co-operation, networking and leads to shared problem-solving approaches
- Encourages participation and enhances role of private, charitable and voluntary sector in local community planning

## **8.0 Strategic Engagement and Integration**

- 8.1 One of the main roles of the LEADER approach is to ensure the development of local areas is taken forward in a collaborative manner which enhances existing strategies and that the LDS is implemented in such a way as to properly complement these. The activities of the LAG can be supported and enhanced by ensuring that projects assist in the delivery of national or local strategic objectives, and where possible provide match funding or other assistance to groups/businesses accessing funding. This section will provide details of the local, national and European policy context, and demonstrate how the LDS aligns with and complements existing strategies to add value within the local strategic landscape.

### **Policy Context**

#### **Europe 2020**

- 8.2 Europe 2020 is the European Union's ten-year growth strategy. The main purpose of the strategy is to put in place key targets and initiatives which will create the conditions for regional and national growth that is smarter, more sustainable and more inclusive than previous growth models. The Europe 2020 strategy is about delivering growth that is: smart, through more effective investments in education, research and innovation; sustainable, thanks to a decisive move towards a low-carbon economy; and inclusive, with a strong emphasis on job creation and poverty reduction.

#### **Scottish Government's Economic Strategy**

- 8.3 Published in 2007, the Scottish Government's Economic Strategy has a main purpose to:

“Focus the Government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.”

- 8.4 The five Strategic Objectives are:

Wealthier and Fairer – Enable businesses and people to increase their wealth and ensure more people share fairly in that wealth.

Smarter – Expand opportunities for Scots to succeed through life-long learning ensuring higher and more widely shared achievements.

Healthier – Help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to healthcare.

Safer and Stronger – Help local communities to flourish, becoming stronger, safer places to live, offering improved opportunities and a better quality of life.

Greener – Improve Scotland’s natural and built environment and the sustainable use and enjoyment of it.

### **Shetland Community Plan and Single Outcome Agreement**

8.7 The Outcomes for Shetland as described in the Shetland Community Plan are:

- Shetland is the best place for children and young people to grow up
- We live longer, healthier lives
- People are supported to be active and independent throughout adulthood and in older age
- Shetland stays a safe place to live, and we have strong, resilient and supportive communities
- Shetland has sustainable economic growth with good employment opportunities and our people have the skills to match, good places to stay and the transport people and businesses need
- We have tackled inequalities by ensuring the needs of the most vulnerable and hard to reach groups are identified and met, and that services are targeted to those most in need
- We deliver all our services in an environmentally sustainable manner to safeguard and enhance our outstanding environment which underpins all our actions and our economic and social well-being
- We have financial sustainability and balance within each partner; and a better balance between a dynamic private sector, a strong third sector and efficient and responsive public services

### **Strategic Integration**

8.8 The table on p.46 shows a list of European, national and local strategies, policies and plans, and potential key links to the LDS from these. Those marked in the column ‘Align’ are those which have been specifically referred to in the generation of LEADER objectives and outcomes, and/or where the LDS work towards similar outcomes and objectives as the identified strategies. Those in the ‘Complement’ column are those where the LDS can work alongside these strategies to enhance, add value or increase the impact of outcomes and objectives.

8.9 The figure on p.47 is intended to show how the CLLD approach to delivering LEADER and EMFF will result in key priorities through integrated working with key local priorities and delivery partners.

Strategic Integration				
		Align	Complement	Links
European	ESF		✓	Skills development
	ERDF		✓	Increasing community capacity
National	Scottish Government	✓	✓	Development in all areas of the Scottish economy
	Community Energy Scotland		✓	Carbon reduction measures
	National Trusts, etc.		✓	Charitable, social and environmental benefits
	Marine Scotland Plan	✓		Development of fishing communities
	Sport Scotland		✓	Improving access to and facilities for sports and recreation
	Third Sector Interface		✓	Improve and enhance services to vulnerable individuals and groups
Local	Shetland Community Plan and SOA	✓	✓	Strengthening community involvement through to ensure that available resources are used effectively and sound decisions are taken for the benefit of Shetland.
	SIC Corporate Plan	✓	✓	Helping build a healthy economy and strong communities
	Shetland Local Development Plan		✓	Development of land and land usage across Shetland
	Shetland Local Housing Strategy		✓	Affordable housing options across all tenures
	A Strategy for Sustainable Shetland Agriculture 2012-2016		✓	Promote and enhance a diverse, competitive and sustainable agriculture industry
	Successful and Sustainable: A Strategy for Shetland Seafood 2009-2013	✓	✓	Developing sustainable fisheries and related activity
	A Fairer Shetland – A Framework for Tackling Poverty, Disadvantage and Social Exclusion in Shetland	✓	✓	Targeting resources to vulnerable individuals and hard-to-reach groups to reduce inequalities
	Shetland Tourism Plan	✓	✓	Increased or enhanced promotion and services for visitors
	Shetland Transport Strategy		✓	Effective, efficient, safe and reliable local transport
	Renewable Energy Development in Shetland: Strategy and Action Plan	✓	✓	Local implementation of carbon reduction and energy efficiency
	SIC Economic Development Policy Statement 2014-2017	✓	✓	Promoting an environment in which newer industries develop alongside thriving traditional industries



