Cornwall Council — one and all · onen hag oll

Council of the ISLES OF SCILLY

Cornwall & Isles of Scilly

LOCAL AREA ENERGY PLAN

Summary Report

IoS local context and characteristics

£22,872 gross disposal household income

UK average £20,425 (136)

15.5 km^2 land area

0.01% of total land area in England

2,054 Population (134)

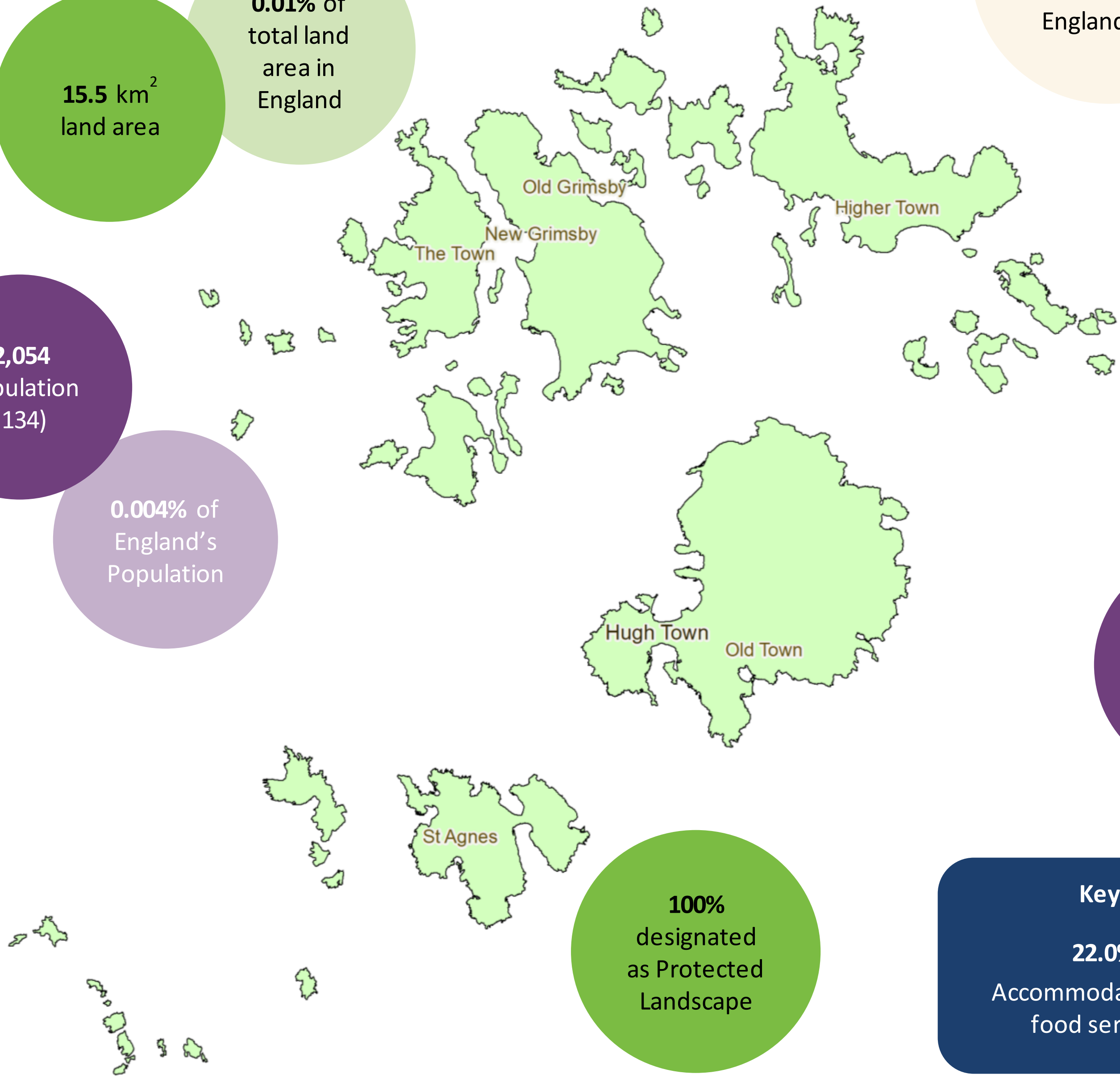
0.004% of England's Population

18% of households in IOS were in Fuel Poverty (76)

England 13.1%

unemployment rate not available at IOS level (78)

England 3.8%



100% designated as Protected Landscape

100% homes off main gas (72)

England 26%

67.7% of properties were built pre-1976 (9)

1,296 domestic properties (9)

Low Population Density

126 people per km^2 (74)

Key Employment Sectors (77)

22.0%	**22.0%**
Accommodation and food services	Agriculture forestry and fishing

Isles of Scilly local energy system

Emissions data has been analysed from both the Department for Energy Security and Net Zero (DESNZ) (61) and the Cornwall and Isles of Scilly Greenhouse Gas Inventory (GHGI) (36). For IoS:

- majority of total emissions (25.7%) and energy only emissions (29.6%) in 2019 were produced from the transport sector. This includes emissions from aircraft support vehicles and inland waterways / domestic navigation (135).
- closely followed by the domestic sector at 22.2% for total emissions and 25.5% for energy only emissions.
- According to the data no annual total emissions were negated through land use change activities (LULUCF).

IoS Greenhouse Gas energy emissions have reduced by

36%

between 2005 and 2019, with the decline influenced by the decarbonisation of the electricity grid

11.1 $ktCO_2e$ emissions (2019)

Baseline year used is 2019

74% of emissions are from energy use (excludes waste, agriculture livestock and soils and LULUCF)

9.7 $ktCO_2e$ energy emissions (2019)

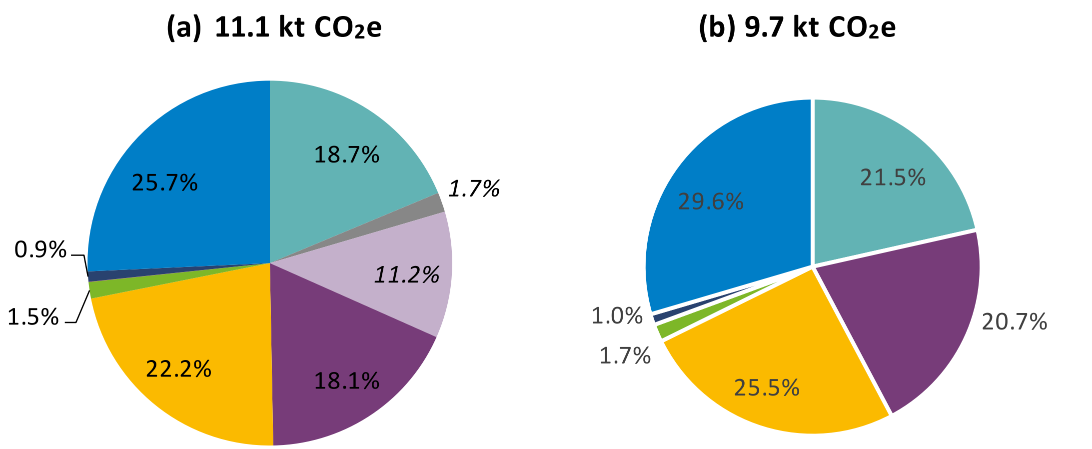


Figure 1: (a) total emissions (values in *italics* are non-energy related emissions which are out of scope for this LAEP) and (b) energy related emissions 2019) (61)

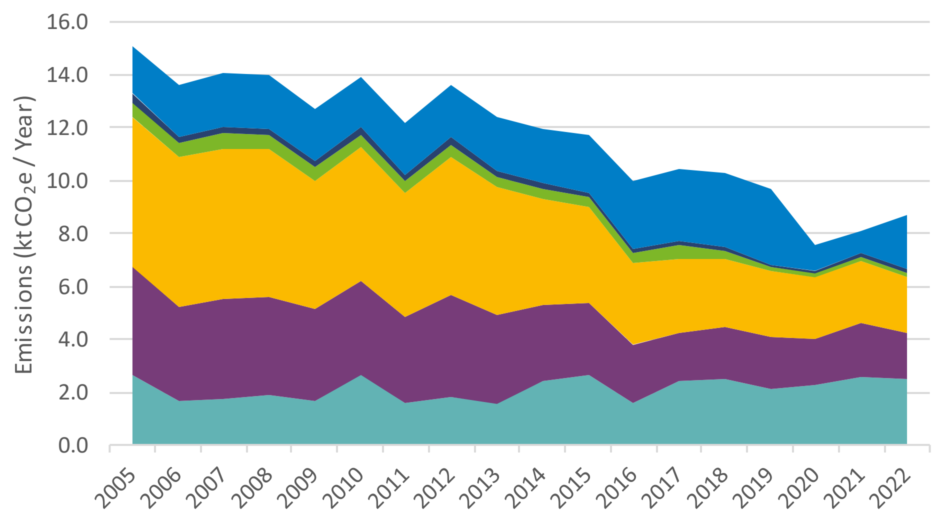


Figure 2: Historical Energy-Related Emissions (2005-2022) (61)

Agriculture (Energy) Agriculture (Non-Energy) All Waste Commercial Domestic Industry LULUCF Public Sector Transportation

Energy Demands and Energy Spend

IoS used **33.7** GWh of energy in 2019 (50)

England Local Authority average of **3,904** GWh

An average of **15.3** MWh per Capita (50)

England Local Authority average of **21.4** MWh

Energy demand on the Isles of Scilly is significantly lower than the England local authority average. The highest energy demand comes from Industry and Commercial sector (58.5%) followed by the Domestic sector (36.6%). Transport and Agriculture sectors only accounted 4.8% and 0.1% respectively.

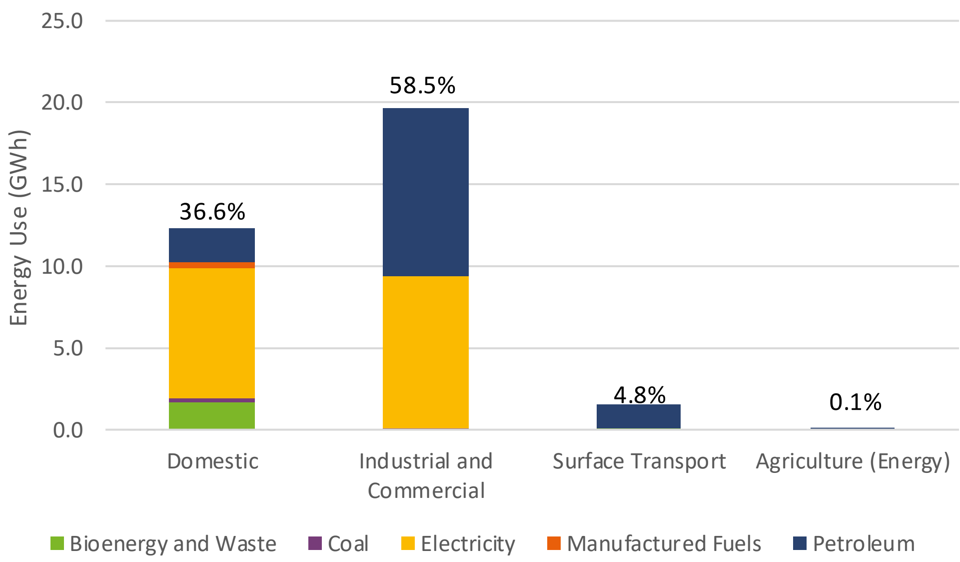


Figure 3: Sector energy use (GWh) 2019) (2)

Figure 5: Total Energy Spend (2019) (63; 64; 65; 68; 66; 67; 69; 70; 84; 71)

IoS spent an estimated **£3.4 million** on energy in 2019

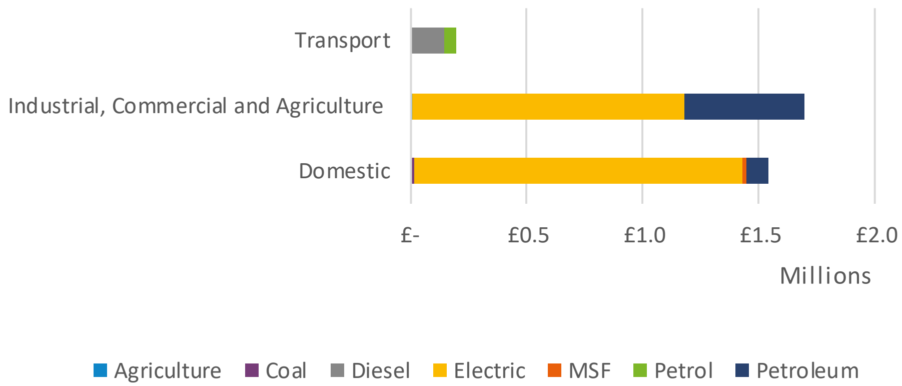


Figure 4: Total Energy Spend by fuel type (2019)

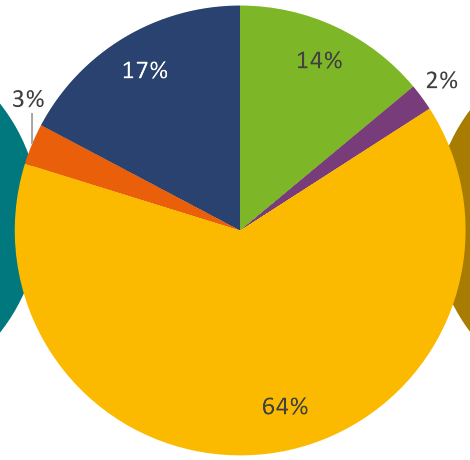
- Industrial, commercial and agricultural energy use accounted for 49.4% (£1.7 6m) of total energy spend
- Energy for domestic household uses (heat and power) accounted for 44.9% (£1.5m) of total energy spend
- Electricity accounted for 91.6% of domestic sector spend and 69.4% of the industrial, commercial and agriculture energy costs in 2019.

Domestic Energy Demand

67.7% of domestic properties were built pre-1976 (9)

100% of homes off main gas

Figure 6 Domestic Energy by fuel type (2019) (82)



Domestic electricity demand totalled **7.87** GWh in 2019 (82)

Mean electricity consumption of **6,861** kWh per meter in 2019

Within domestic energy usage, there is a high electricity dependence at 63.9%. The IoS has the highest mean domestic electricity consumption per household in the UK.

In 2019, each home used an average of 6,861 kWh of electricity per meter, compared to the domestic average for England at 3,664 kWh per meter (**Error! Reference source not found.**).

This is likely driven by the high levels of electric heating (due to the Islands not being connected to the gas grid), local weather, age of housing stock

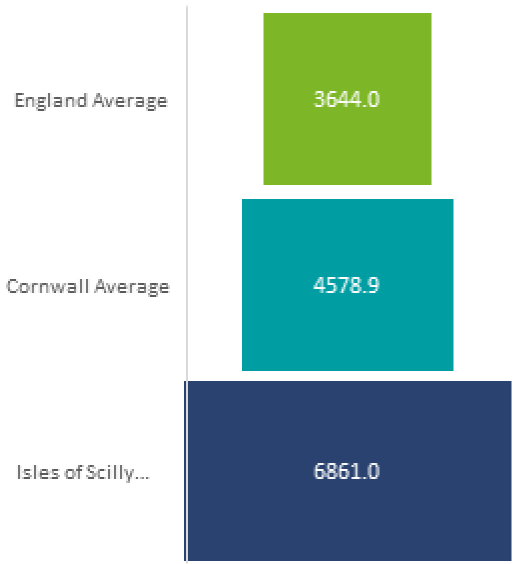


Figure 7: Average domestic electricity consumption per meter (kWh per meter) (82).

Homes on the IoS are particularly energy inefficient. 34.4% of properties on the islands have an EPC rating of F or G compared to the Cornwall which has 11.1% (9).

Due to the age of some of the buildings, some homes do not have central heating and must rely on older space heating solutions like storage heaters or electric fires that are energy intensive and provide poor quality heating.

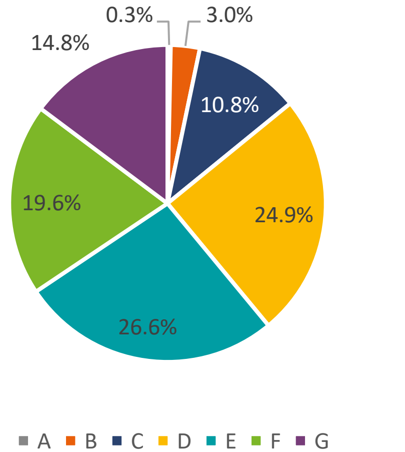


Figure 8: Isles of Scilly's EPC ratings taken from EPC data July 2024 (9).

Non-domestic Energy Demand

The non-domestic sectors account for **58.5%** of IoS energy use at **19.7** GWh (2019) (50)

Non-domestic electricity demand totalled **9.2** GWh (50) in 2019

Non-domestic petroleum use totalled **10.4** GWh (50) in 2019

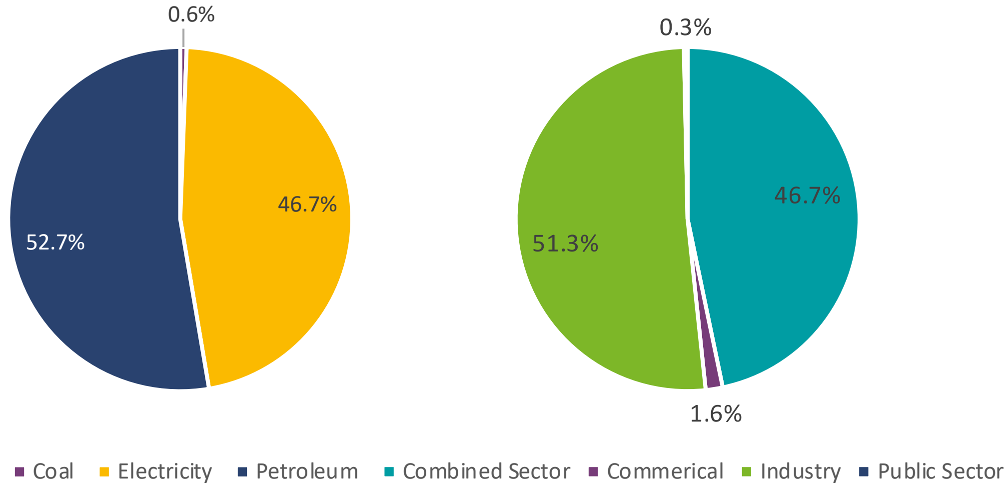


Figure 11: non-domestic energy use by (a) fuel type and (b) sector (2019) (50)

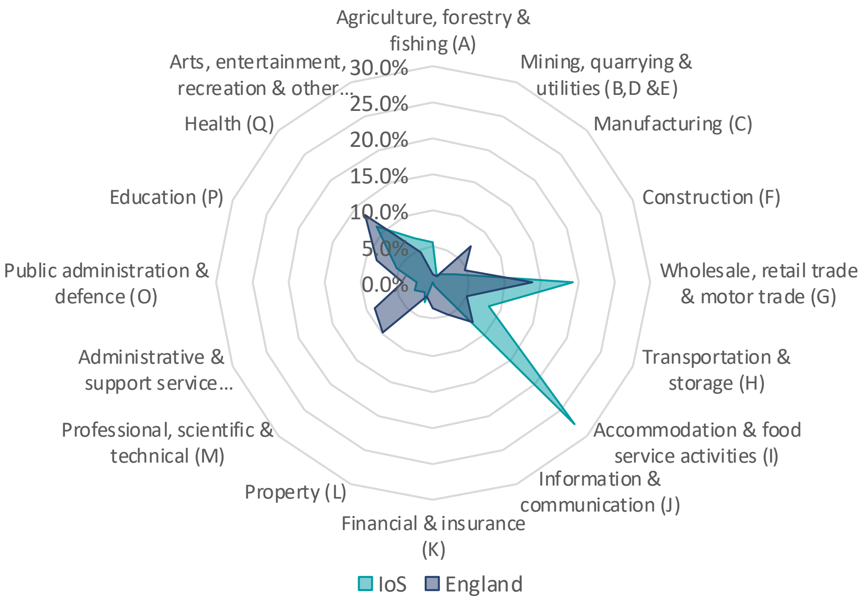


Figure 9: Percentage of employed by industry 2023

Accommodation and food services is one of the main industries (22%) and key employment (27.6%) sectors for IoS.

Agriculture, forestry and fishing was also a key industry, whilst wholesale, retail trade and motor trade employed the second highest.

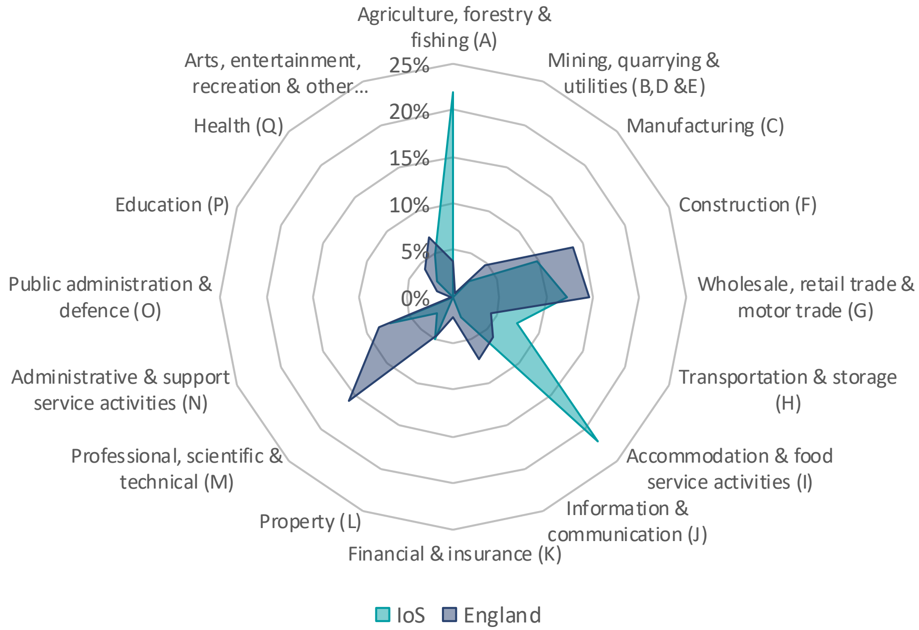


Figure 10: Percentage of enterprises by industry 2024

Surface Transport Energy Demand

In 2019, surface transport fuel consumption totalled **1.7**GWh (50)

Personal transport accounted for 54% of energy consumption

46% of energy consumption was from freight transport

On-road transport used 1.1 GWh (69%) of diesel and 0.4 GWh (27%) of petrol

The highest fuel consumption (77%) occurring on A-roads and 23% on minor roads

Figure 13: On-road transport (2019) (84)

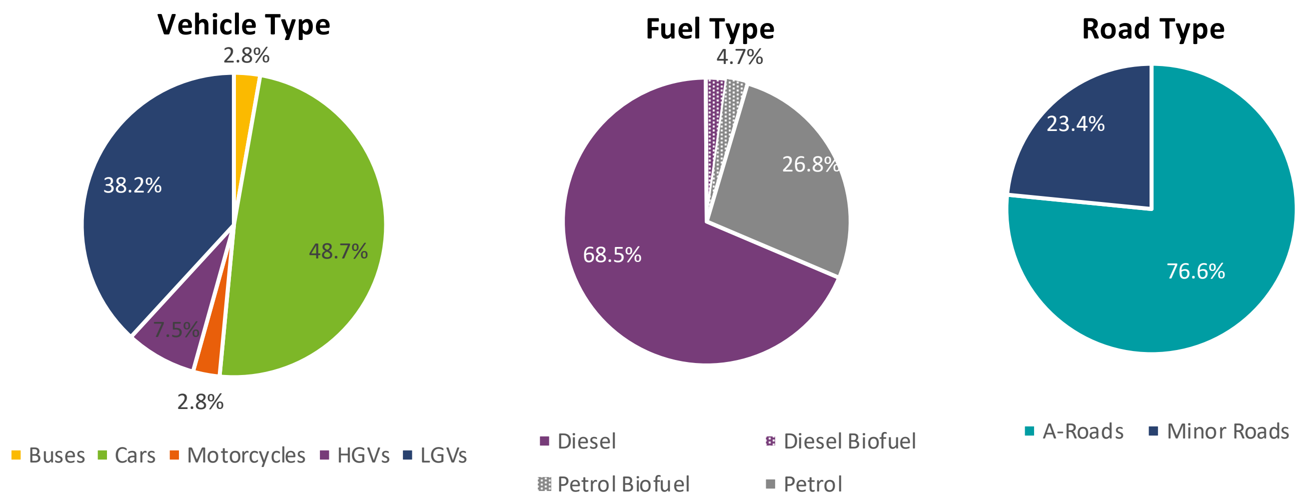
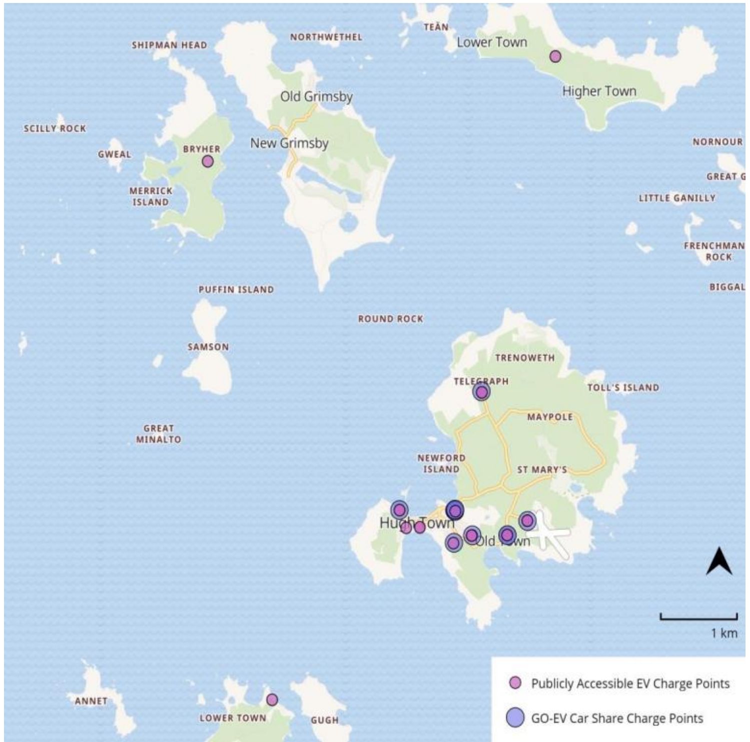


Figure 12: Existing publicly accessible 'GO-EV' Car Share EV charge points (contains OS data © Crown copyright)



There are **24** publicly accessible 'GO-EV' charge points

4.5% of vehicles registered in IoS are pure electric (Q2 2024) (93; 94)

Total number of registered plug-in cars, motorcycles and light good vehicles Q2 2024 (94): **48**

Number of DVLA registered EVs belonging to the GO-EV car scheme: **14**

Number of rental electric golf carts on St Mary's Island*: **26**

Number of private electric golf carts on St Mary's Island*: **12-15**

* additional to the DfT datasets. Tresco Island has additional golf carts but as there are no public roads these are not registered.

Maritime and Aviation Transport

The maritime and aviation sector provides essential transportation services for both passengers and goods between the islands and the mainland. It is vital for maintaining the connectivity, economic development, and tourism of the archipelago.

Maritime

The Scillonian (passenger and freight) and Gry Maritha (freight) ships travel between Cornwall and the Isles of Scilly. There are other marine operators that supply the island's freight requirements. The Lyonesse Lady travels between the islands to deliver freight to the off islands. There are also passenger boats that operate between the islands for residents and visitors.

Aviation

St. Mary's Airport is the main airport connecting the archipelago to Land's End, Newquay, and Exeter. Penzance Helicopters have services from both St. Mary's Airport and Tresco.

2% of IoS total emissions in 2019 came from the IOS – mainland maritime (36)

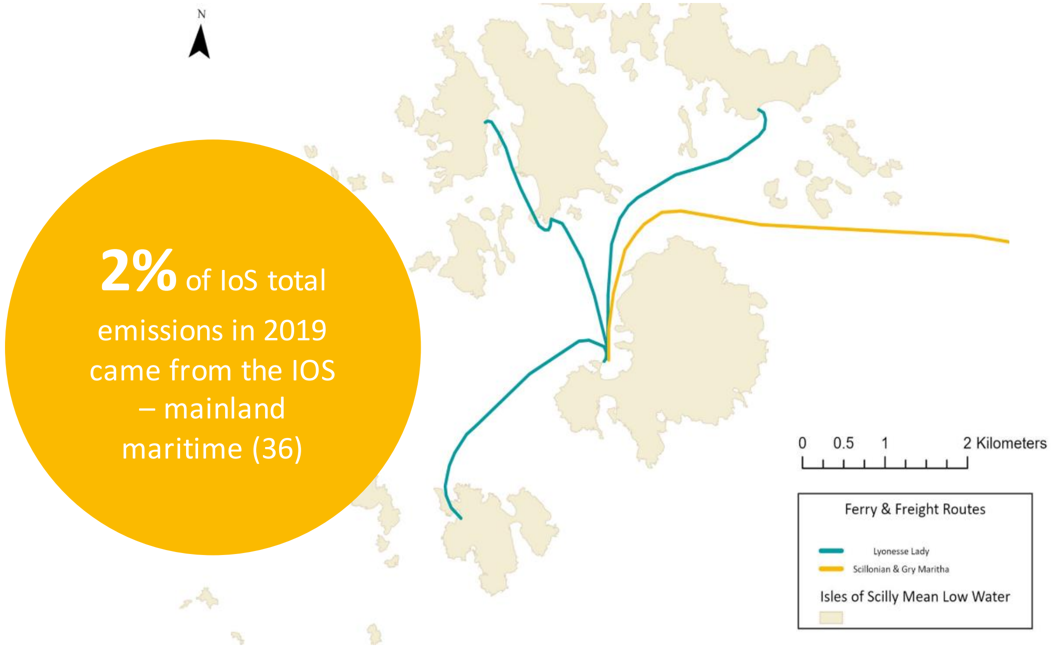


Figure 15: Ferry and freight routes in the Isles of Scilly (Contains OS data © Crown copyright)

15% of IoS total emissions in 2019 came from the IOS – mainland aviation sector (36)

Figure 14: Aviation routes in the Isles of Scilly (Contains OS data © Crown copyright)

Renewables Energy Installations

IoS renewables energy capacity is **0.27** MW (2019) (80)

IoS renewables generated **239** MWh (2019) (80)

IoS renewable installations are from small-scale PV including rooftop PV

IoS earnt nearly **£10.5k** from renewable energy (2019)

100% registered to local addresses

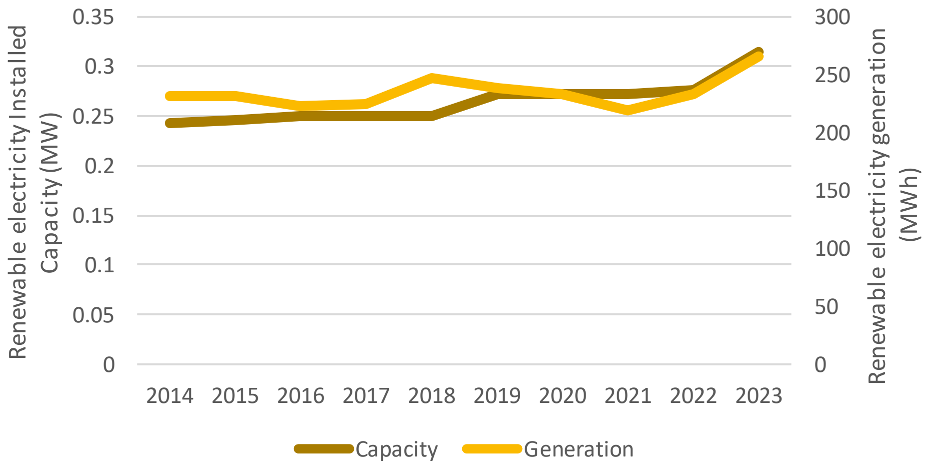


Figure 16: Renewable electricity installations (80)

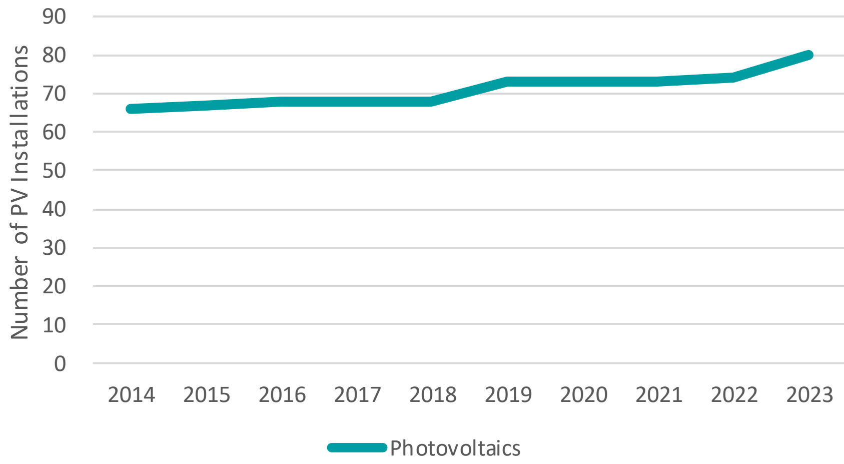


Figure 17: Renewable electricity installations (80)

The number of small-scale PV installations have steadily increased since 2014, which has led to a steady increase in installed capacity. Volume of renewable electricity generated has only increased over the time period but does have a peak in 2018 and a dip in generation in 2021.The number of small-scale PV installations have steadily increased since 2014, which has led to a steady increase in installed capacity. The volume of renewable electricity generated has only slightly increased over the time period but does peak in 2018 with a dip in generation in 2021.

1 Cornwall Summary and Action Plan

2 Isles of Scilly Summary and Action Plan

Scenario comparison

This section presents a comparison of projected changes in the Isles of Scilly's energy mix under the four explanatory scenarios, each of which explored a different potential pathway for the islands' to transition towards more affordable, secure and clean energy.

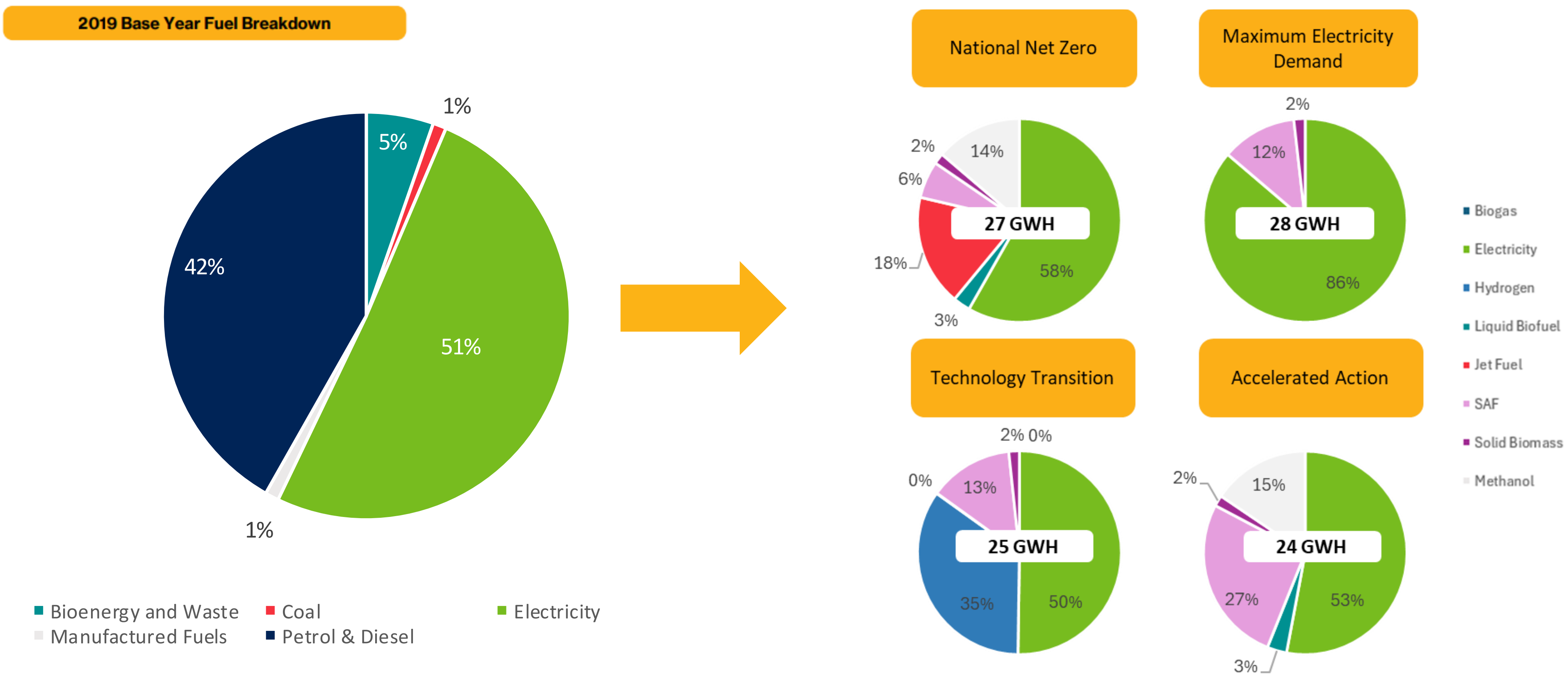


Figure 18: Isles of Scilly 2019 base year fuel breakdown compared against explanatory scenarios in 2050

Figure 18 illustrates how the potential fuel mixes projected for the Isles of Scilly in 2050 under the four exploratory scenarios differ from the islands' baseline (2019) fuel mix. In 2019, approximately 43.9% of the islands' final energy demand was met by fossil fuels. In all four scenarios these fuels are largely replaced by electricity by 2050. *Technology Transition* is the only scenario that envisions the use of green hydrogen to meet a proportion of the islands' future energy demand, with hydrogen replacing some marine diesel and aviation fuel—where operational requirements make electrification challenging.

Despite projected economic and household growth on the Isles of Scilly leading to growth in the islands' final energy demand, all scenarios show a net reduction in total fuel demand between 2019 and 2050. This reduction in the islands' fuel demand is driven by both demand reduction measures and the efficiency gains associated with electrifying heat and transport. All the explanatory scenarios modelled are compatible with the UK's legally binding climate targets with the islands achieving up to a 99% reduction in carbon emissions by 2050 compared to the base year—depending on the carbon intensity of the electricity grid and the methods used for fuel production.

As each explanatory scenario explores different routes the Isles of Scilly could take to more affordable, secure and clean energy supplies and different growth assumptions, the system transition costs vary across the scenarios. Figure 19 presents the estimated annualised system costs for transitioning buildings and road transport for each scenario.

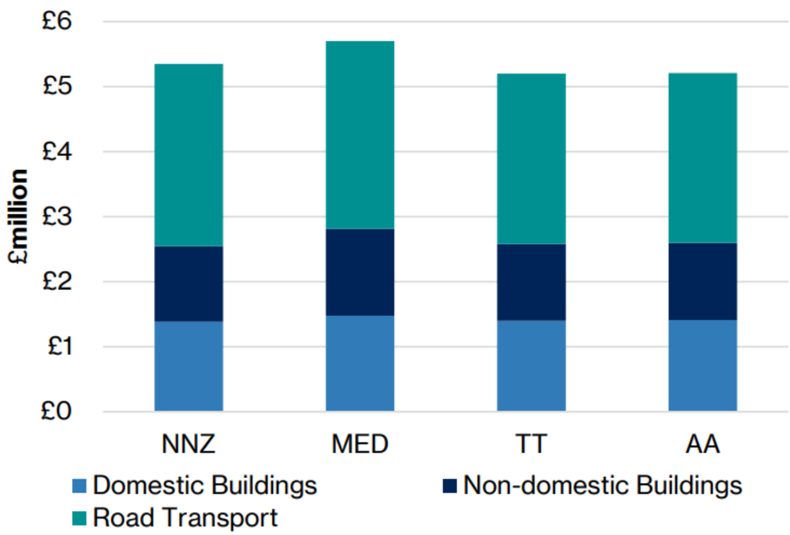


Figure 19: IoS 2050 annualised system costs for each exploratory scenario

The *Maximum Electricity Demand* scenario incurs the highest costs, primarily due to increased electricity consumption. In contrast, the *Accelerated Action* scenario has the lowest costs, reflecting lower growth assumptions for buildings and the highest levels of demand reduction.

Figure 20 illustrates the maximum renewable electricity generation under each scenario, compared to the islands' total electricity demand for that scenario.

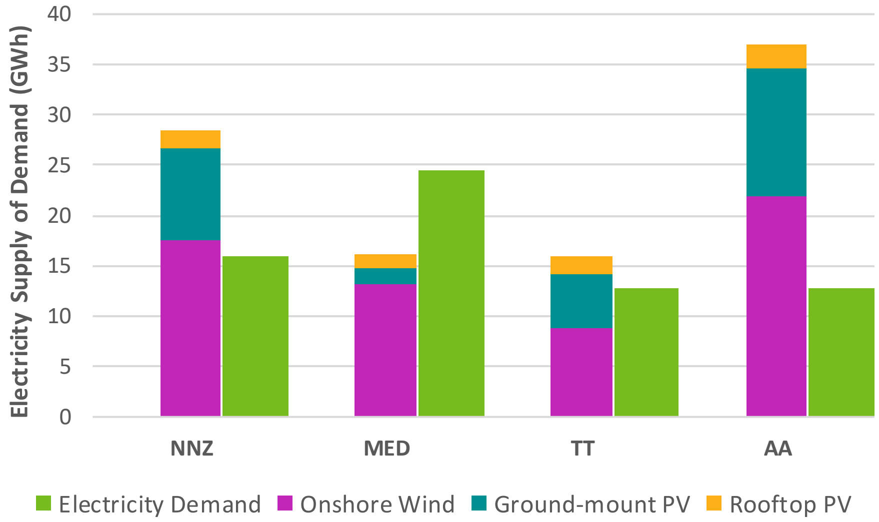


Figure 20: Isles of Scilly 2050 maximum renewable generation

In all cases, the scenarios modelled produced more renewable electricity from local generation than the Isles of Scilly's total annual electricity demand. However, it is assumed that the islands will remain connected to the mainland electricity network, as the undersea cable allows for electricity imports during periods when local generation does not meet real-time demand, and for the islands to export power during times of surplus generation when supply exceeds local demand.

Best Outlook implementation

Based on feedback from the Council of the Isles of Scilly and local stakeholders, a single Best Outlook scenario was developed to reflect a realistic pathway that could transition the islands towards more affordable, secure and clean energy in a way that that reflects the islands' community's challenges, opportunities and priorities.

This section outlines the Best Outlook scenario's key components: carbon emissions reduction and the approach to the energy transition, alongside the associated costs, and the local benefits. These outcomes are then compared against a counterfactual scenario, in which the Isles of Scilly does not achieve the legally binding UK net zero by 2050 target.

Emissions reductions

Between the baseline year of 2019 and 2050, the Best Outlook pathway results in an estimated reduction of approximately 28 ktCO_2e compared to the Counterfactual pathway (see Figure 21), within the scope of activities specific to the Isles of Scilly[1].

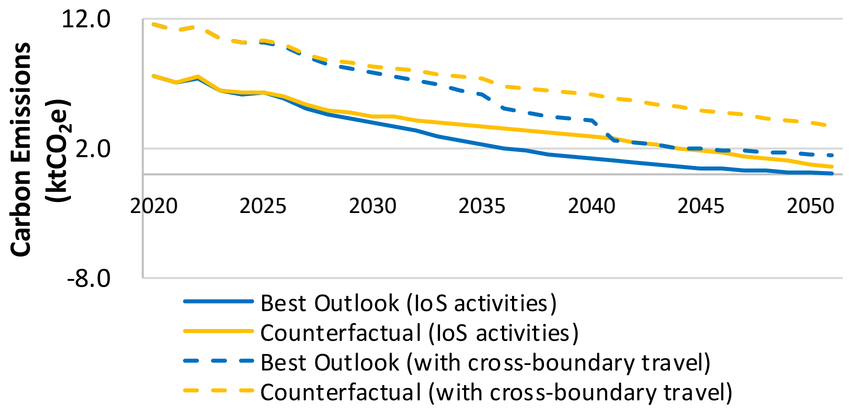


Figure 21: Total annual carbon emissions pathways

[1] Two emissions scopes are shown below; one which includes the emissions associated with cross-boundary aviation and maritime travel to the mainland, and one without, which has just IoS specific, inter-island maritime activities.

Figure 22, illustrates carbon emission reduction pathways for the islands' buildings, road transport, intra-island and commercial boating under the *Best Outlook* scenario. This excludes travel between the islands and the mainland, which are treated separately. The relatively high proportion of carbon emissions from the energy use in the islands' buildings—compared to the lower emissions from transport—underscores the importance of prioritising improving the energy efficiency on the islands and transitioning to clean heating systems.

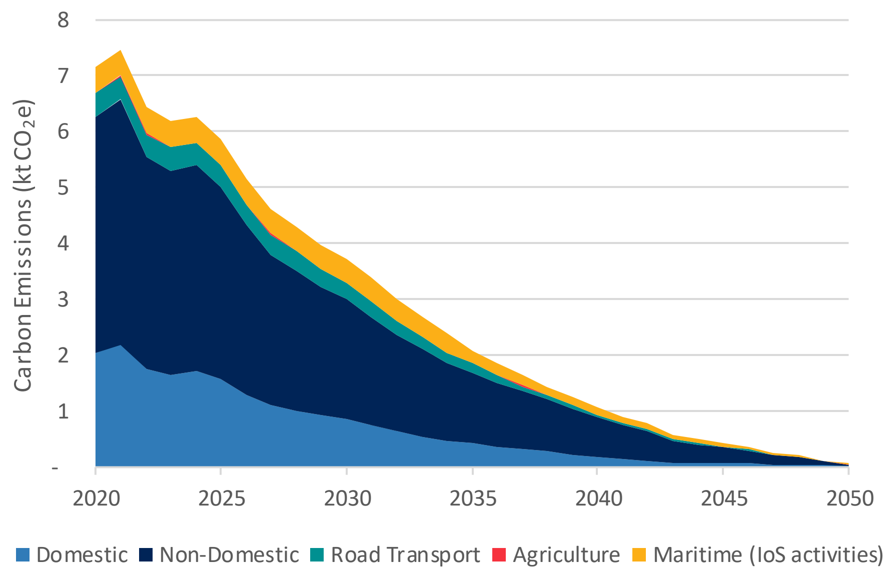


Figure 22: Best Outlook sector carbon emissions by sector (IoS activities)

When emissions from cross-boundary maritime and aviation travel between the Isles of Scilly and the mainland are included, the base year emissions increase to approximately 12 ktCO_2e. A significant portion of these emissions is projected to persist beyond 2045, primarily due to some continued use of fossil jet fuel in aviation (see Figure 23 below).

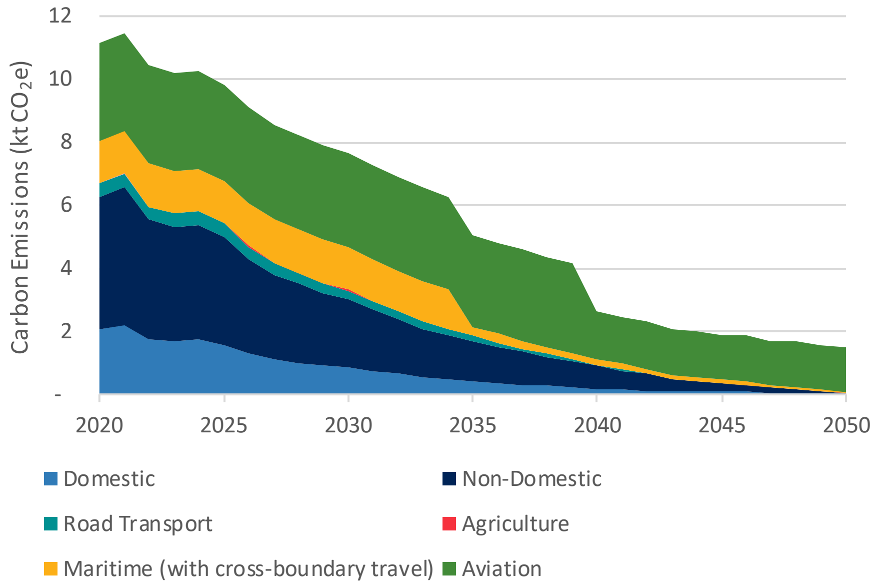


Figure 23: Best Outlook sector carbon emissions by sector (with cross-boundary travel)

Local benefits

The potential impact of the *Best Outlook* pathway on the Isles of Scilly has been assessed in comparison to a *counterfactual* pathway, in which fossil fuel dependency continues on the islands up to 2050. This analysis has identified several local benefits that could result from a well-designed and effectively managed clean energy transition:

- **Lower energy bills** for residents and businesses
- **Improved health and wellbeing** outcomes for residents
- **Greater local and community ownership of energy** generation, leading to enhanced energy security
- **Creation of local jobs**

Energy bills

According to the *Best Outlook* scenario, households in the Isles of Scilly could save a total of £691,973 on their annual energy spend by 2050, compared to a 2024 estimated counterfactual spend of £1,498,568. This equates to the average households annual energy bills in 2050 being approximately £700 lower in real terms compared to their 2024 energy bills. To achieve these savings, requires an estimated upfront investment of £4.6 million into domestic heating improvements and fabric upgrades to existing homes. The most significant savings could be achieved by installing heat pumps, supported by the Boiler Upgrade Scheme or successor grant schemes, and by improving loft insulation.

Health and wellbeing

While the standard ‘societal cost’ methodology commonly used in local area energy planning—particularly for estimating the reduction in damage costs from harmful pollutant emissions and their impact on public health—was not deemed directly applicable to the small island communities of the Isles of Scilly, the *Best Outlook* scenario is expected to help promote health and wellbeing on the islands.

The improvements in home energy efficiency and the transition to low-carbon heating systems outlined in the *Best Outlook* scenario are expected to positively influence the physical and mental health of residents. These changes can enhance quality of life and help alleviate the cost-of-living crisis, which disproportionately affects low-income and vulnerable households on the islands.

Although these potential benefits have not been formally quantified, analysis conducted during the development of the scenario suggests several key health and wellbeing improvements for residents would be promoted through the transition to more affordable, secure and clean energy including:

- **Reduced damp and mould:** properly installed insulation and ventilation can prevent damp conditions, lowering the risk of respiratory problems and allergy-related illnesses (1).
- **Improved indoor air quality:** retrofit measures, including enhanced insulation and ventilation, can reduce indoor pollutants and allergens, supporting respiratory health (2).
- **Increased thermal comfort:** energy efficiency upgrades help maintain comfortable indoor temperatures year-round, reducing health risks associated with extreme heat or cold (2).
- **Lower financial stress:** reduced energy bills from efficiency measures can ease financial burdens and associated anxiety (3).
- **Better living conditions:** a warmer, healthier home environment contributes to improved mental wellbeing and overall quality of life (4).

Increased local and community-ownership of energy generation and greater energy security

The relatively small-scale renewable energy systems modelled in the Isles of Scilly *Best Outlook* pathway are well suited to a community energy approach. The presence of the Isles of Scilly Community Venture already working on the islands, indicates a strong opportunity for the local community to take greater control of their energy future.

Generating more clean power locally—especially alongside the electrification of heat and transport—will reduce the islands' reliance on imported energy and enhance energy security and retain more of the energy spend in the local economy. When combined with smart metering and local supply arrangements, such as time-of-use tariffs like an 'Energy Local' model, community energy projects could also help lower energy bills for residents. Deploying additional community-owned renewable generation combined with smart tariffs would enable consumers on the islands to purchase electricity at reduced rates when it is generated locally, avoiding transmission costs and encouraging smarter energy use by reflecting real-time renewable availability.

Beyond cost savings, expanding the community energy model on the islands will create opportunities for local investment and economic development. Profits from local energy generation could be reinvested into the community, supporting jobs, funding environmental and social initiatives, and building energy literacy. This approach empowers residents to actively participate in the energy transition—ensuring the islands' energy future is fair, inclusive, and aligned with local priorities.

Job creation

The *Best Outlook* scenario for the Isles of Scilly could create between 2 and 4 permanent jobs, with some new local engineering jobs created to maintain renewables. However, while heating engineers will be needed to maintain heat pumps, this demand could potentially be met through the retraining existing heating engineers, rather than generating new jobs.

The *Best Outlook* scenario is also expected to generate more skilled temporary jobs than the *counterfactual* scenario. These temporary roles—primarily focused on the installation of heat pumps and retrofit measures—are projected to peak in the early 2030s, with an estimated 6 to 7 additional workers required during the installation phase.

The net number of temporary jobs projected up to 2050 under the *Best Outlook* pathway set against the Counterfactual is illustrated in **Error! Reference source not found.** below.

Figure 24 Figure 24: Temporary installation jobs created by pathway

Best Outlook pathway cost summary

Although there is a significant cost associated with the counterfactual pathway—to maintain or replace existing capital assets where required and pay for energy imports—the upfront capital investment required for the islands' local energy system is £23.41 million higher under the *Best Outlook* pathway than under the counterfactual.

Delivering the *Best Outlook* pathway would require significant upfront capital investment in low-carbon technologies, including renewables, heat pumps, ultra-low emissions vehicles, and supporting infrastructure. However, this investment will generate returns in operating cost savings in later years. By 2050, the *Best Outlook* pathway is expected to have helped reduce the Isles of Scilly's cumulative energy spend compared to the counterfactual pathway (see Figure 25).

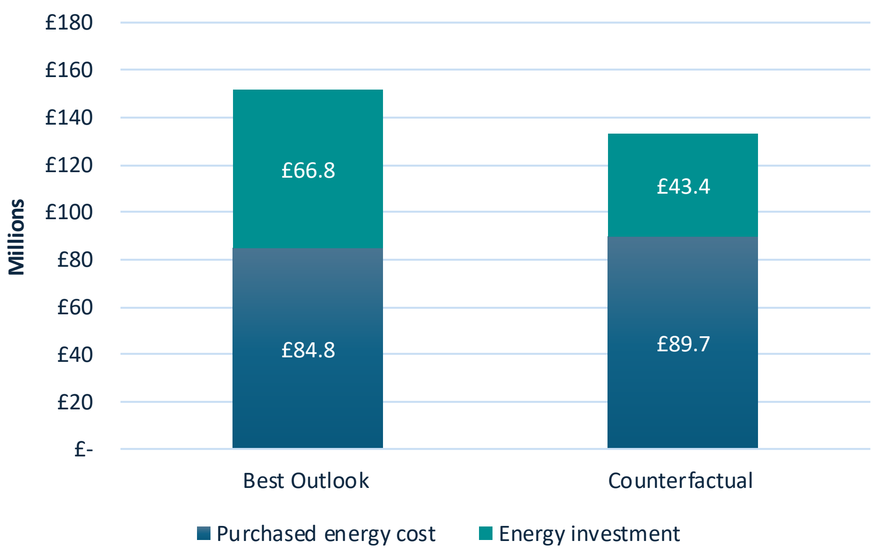


Figure 25: Total cost to 2050. Comparison between the Isles of Scilly Best Outlook and Counterfactual pathways

A breakdown of the *Best Outlook* pathway costs relative to the corresponding costs incurred in the counterfactual pathway, broken down by investments in energy infrastructure and the costs for purchased energy up to 2050 is shown in Figure 26. The largest investment requirement under the *Best Outlook* pathway is a £14.5 million investment into deploying renewables. However, if managed effectively, this investment into renewables will enable the Isles of Scilly to retain a significantly higher proportion of its energy expenditure and the associated workforce locally (as outlined in the local benefits and job creation sections above).

Currently, most of the electricity and fuels consumed on the Isles of Scilly are imported from the mainland, meaning the that the islands' residents, businesses, and public bodies are reliant on expensive energy supplies, with the associated energy expenditure leaving the local economy. These supplies are exposed to volatile and insecure global fossil fuel markets, alongside the increasing risk of energy price inflation. In contrast, under the *Best Outlook* pathway, the Isles of Scilly could produce enough electricity locally to meet a significant proportion of the islands' annual electricity demand, improving energy security and supporting the local economy.

The *Best Outlook* pathway would enable the islands to reduce total expenditure on energy purchases between 2019 and 2050 by 5% (£4.88 million) compared to an estimated counterfactual spend of £89.65 million. The most significant reductions come from decreased consumption of imported fossil fuels, resulting in savings of £6.42 million on oil imports up to 2050. However, the islands expenditure on electricity during this period increases by £477.44 thousand, reflecting increased electrification of heating and transport, offsetting some of the savings from avoided petrol and diesel imports.

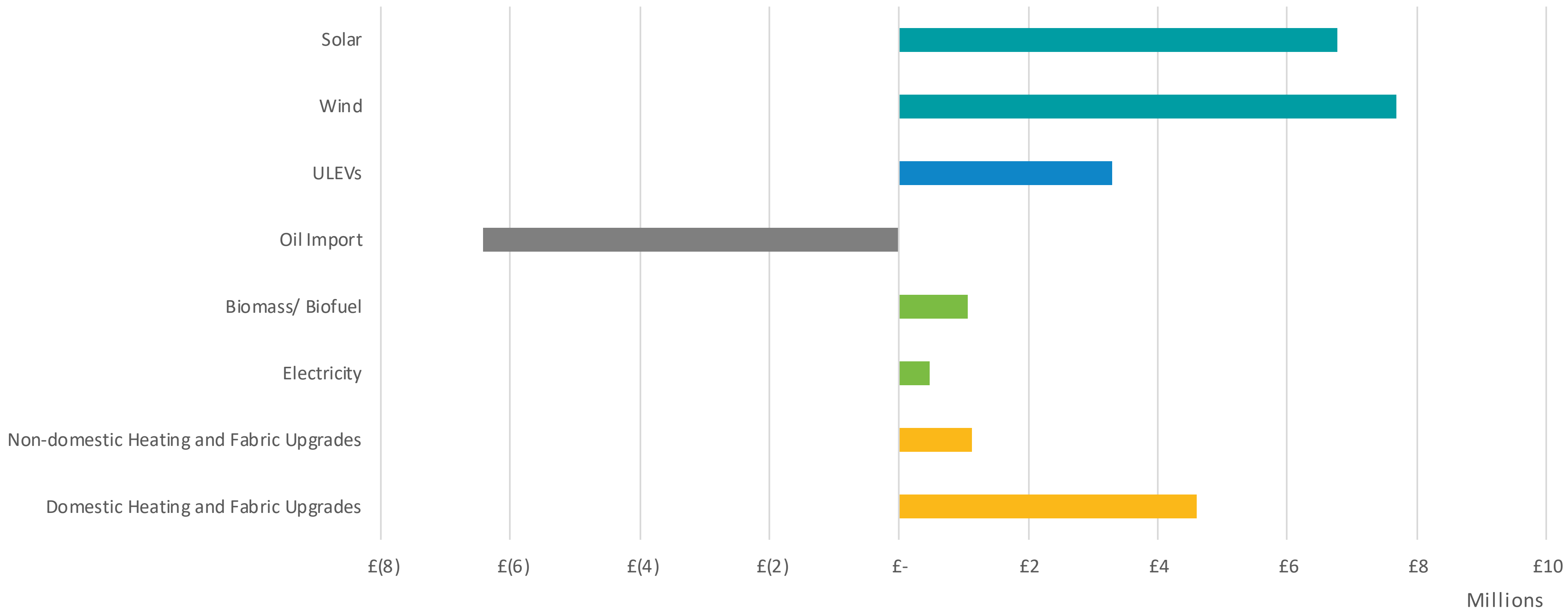


Figure 26: Cost breakdown to 2050. Comparison between Isles of Scilly Best Outlook and Counterfactual pathways

Interventions and actions

The scenario and pathway modelling conducted during the development of this LAEP has identified proposed interventions aimed at facilitating the energy transition in Cornwall and the Isles of Scilly. The key assessment factors considered in the analysis were the:

- Potential impact on carbon emissions.
- Indicative cost of the proposed interventions.
- Potential for energy demand reduction or local energy generation.

The interventions recommended to support Cornwall and the Isles of Scilly's energy transition are organised under five mission areas. These are complemented by a set of cross-cutting actions. To support the delivery of these missions, thirty headline actions have been identified through engagement with local stakeholders (see Figure 27), under which 150 detailed near-term recommend actions. Some of these actions are specific to either Cornwall or the Isles of Scilly, while others are shared across both regions.

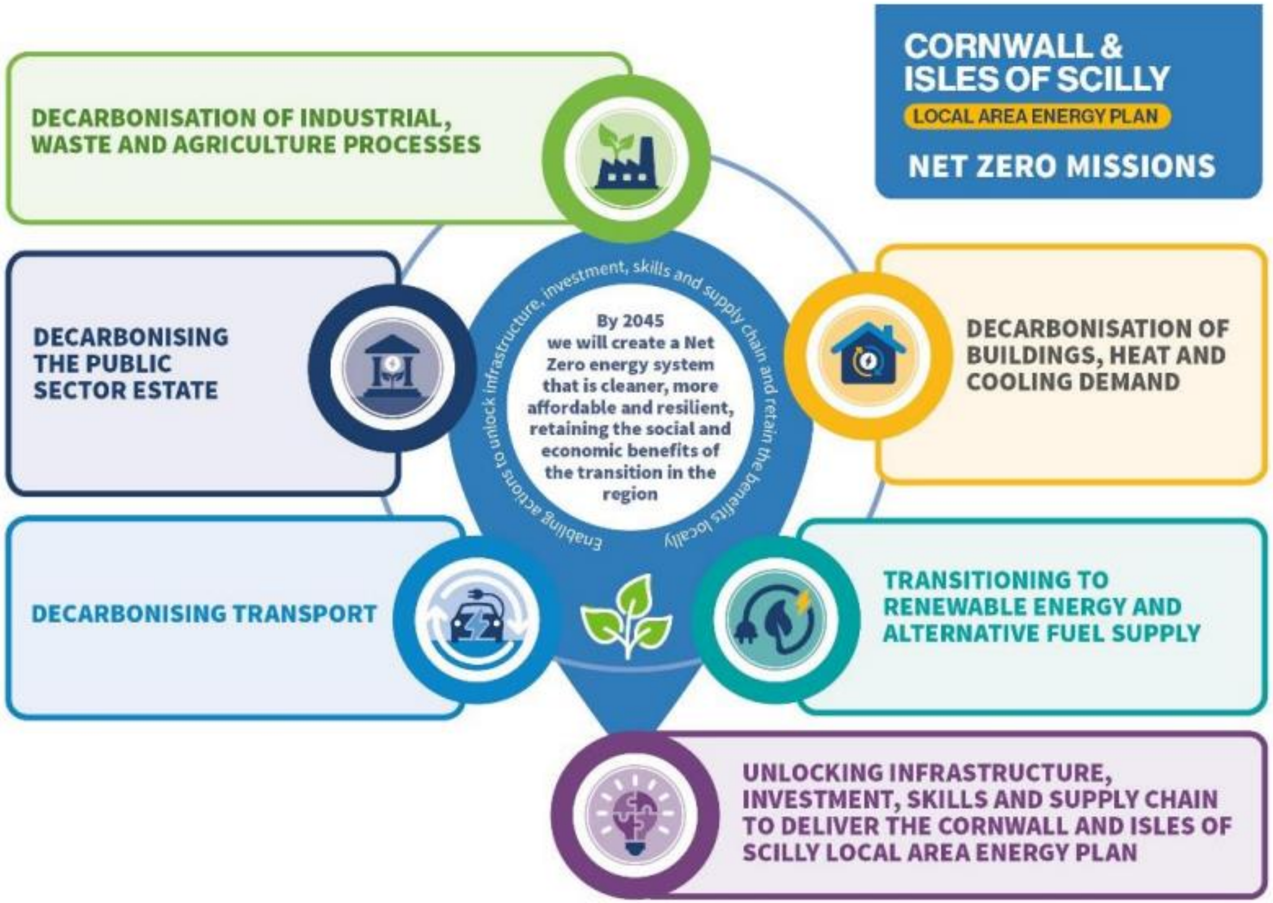


Figure 27: Cornwall and Isles of Scilly Net Zero Missions

This section outlines the headline actions relevant to both Cornwall and the Isles of Scilly, along with twelve near-term actions recommended specifically for the Isles of Scilly. These twelve actions do not represent the full set of near-term actions applicable to the Isles of Scilly, as several shared actions also apply.

The complete list of relevant actions for the Isles of Scilly includes:

- Actions identified as specific to the Isles of Scilly
- Shared actions referred to as "Cornwall and Isles of Scilly" in the detailed Action Plan (Appendix 1).

Cross-cutting action areas

The cross-cutting and enabling headline action areas recommended for Cornwall and the Isles of Scilly, along with specific near-term actions for the Isles of Scilly are set out below. The cross-cutting action areas—discussed in the Cornwall LAEP section (see Table 7)—focus on:

- Effective local governance
- Finance and investment
- Skills, workforce and supply chain
- Public participation and action
- Strategic energy infrastructure planning

The Isles of Scilly-specific cross-cutting actions are detailed below.

8.1.1 IoS low-carbon apprenticeships

Work to deliver apprenticeships in low-carbon installations on the IoS

8.1.2 IoS net-zero research

Work with research establishments to facilitate studies which benefit the islands and accelerate net-zero action

Renewable Energy Mission

Deploying local renewable energy generation, renewable heating systems, and transitioning to alternative fuels on the Isles of Scilly offer a route to provide more affordable, secure and clean energy for the islands. Together these measures can also enhance energy security, lower residents' energy bills, and generate income for the islands' communities, building and landowners, as well as the local supply chain.

Renewable electricity generation interventions overview

We will encourage and support renewable energy initiatives across the islands (29)

As part of this LAEP, opportunities for expanding renewable electricity generation on the Isles of Scilly have been assessed. This includes rooftop solar PV, ground-mounted solar, and onshore wind.

The analysis assumes that the islands will not rely solely on local renewables or aim for complete energy self-sufficiency. Instead, all scenarios maintain a connection to the mainland grid. The renewable capacity and generation estimates presented in the section represent the maximum realistic potential contribution of local renewables modelled—rather than minimum targets that need to be achieved.

The renewable energy capacity for the Isles of Scilly modelled for under the *Best Outlook* pathway is circa 8 MW. Figure 28 illustrates the breakdown of technologies modelled. However, subsequent stakeholder feedback suggested a potential preference to shift toward a higher proportion of ground-mounted solar and reduced wind.

How renewable energy is deployed—which will need to be in collaboration with communities—is just as important as how much solar or onshore wind is deployed on the islands. Community energy initiatives, such as the Isles of Scilly Community Venture, could play a vital role in delivering the renewable energy on the islands. The Isles of Scilly Community Venture is currently developing a Community Energy Network which aims to reduce energy bills through providing access to cheaper, locally generated electricity (5). This approach demonstrates how the energy transition can be delivered in a way that maximises benefits for islanders.

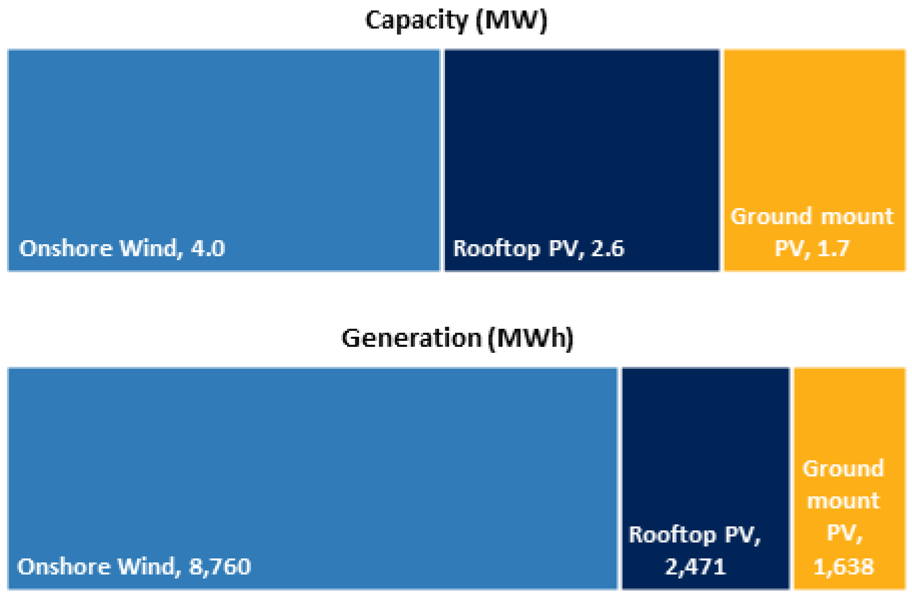


Figure 28: Potential renewable capacity (MW) and generation (MWh) by technology type

The estimated capital cost for deploying renewable energy on the Isles of Scilly is approximately £14.5 million under the *Best Outlook* scenario. Figure 29 shows a detailed breakdown of these costs. The Council of the Isles of Scilly will not bear the majority of these costs. Instead, the financial responsibility will be shared among renewable energy developers, local businesses, and property owners.

In this scenario, a significant portion of the ground-mounted solar and onshore wind installations are expected to be developed as community energy projects. These initiatives could return 25% to 50% of energy costs to the community—either through dividends from community-owned assets or via reduced energy prices under an Energy Local style tariff.

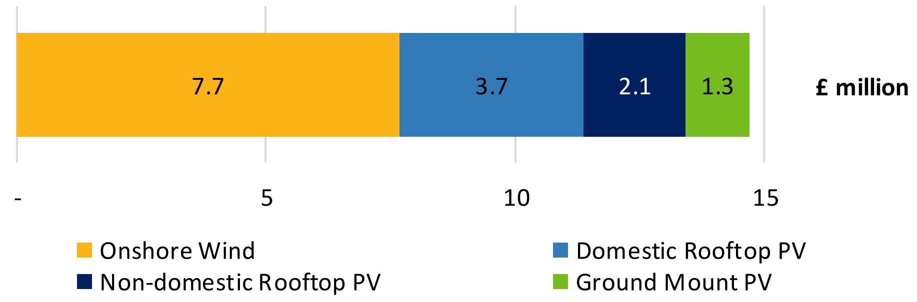


Figure 29: Estimated renewable generation investment costs

This LAEP does not attempt to identify specific sites as suitable for onshore wind or ground-mounted solar installations. Any community-scale renewable energy projects on the islands will need to be relatively small scale and a locations identified based on land availability and community views. These locations would need to be determined on a case-by-case basis, rather than through a top-down assessment and energy planning approach.

Estimated total capital cost **£14.5mn**

Potential rooftop solar PV locations were identified based on housing density across the islands (see Figure 30). A targeted area-based rollout in more densely populated residential areas may make deployment more cost effective. Hugh Town on St Mary's, with the highest population and housing density, offers the greatest potential for rooftop solar and the best opportunity to achieve economies of scale through an area-based rooftop solar programme. However, there are also other opportunities for rooftop solar deployment elsewhere on St Mary's and the off islands.

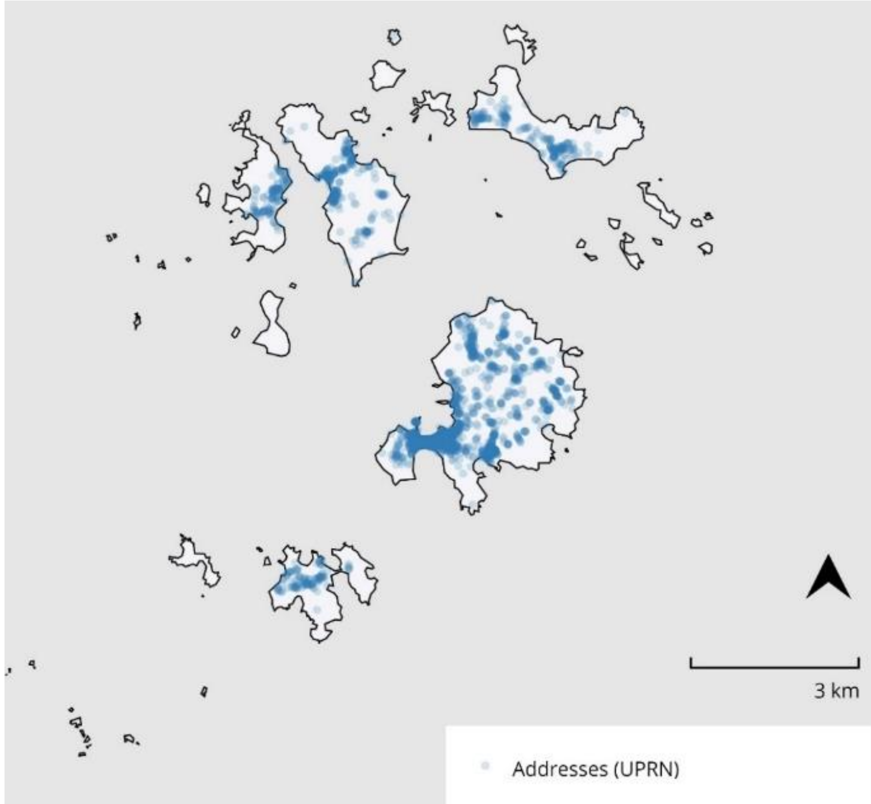


Figure 30: Rooftop PV Focus Zones (Contains OS data © Crown copyright) (6)

Transforming the electricity network for a net zero future

Electricity network capacity and resilience are essential to delivering affordable, secure, and clean energy to the islands—particularly as heat and transport are electrified and local renewable generation increases. Modelling conducted for this LAEP indicates that the Isles of Scilly primary sub-station has sufficient capacity to meet the rising electricity demand projected in the *Best Outlook* scenario. However, data from National Grid Electricity Distribution suggests that the islands' sub-station lacks the capacity to accommodate the additional renewables generation modelled in the scenario. The network upgrade requirements and costs remain uncertain, as they will depend on the nature of the renewables deployed and mix of conventional grid reinforcement and flexible solutions used.

460kW renewable energy generation was installed on the islands through the Smart Islands Programme (57)

Alternative fuels

Low-carbon alternative fuels—such as hydrogen and biodiesel—produce significantly fewer carbon emissions than traditional fossil fuels. The *Best Outlook* pathway suggests these fuels are anticipated to play a key role in the meeting the Isles of Scilly's future energy demands, particularly for hard to electrify transport applications.

Green hydrogen

Green hydrogen, produced via electrolysis powered by renewable electricity, could play a crucial role in transitioning the islands' maritime and aviation sectors. By 2050, the *Best Outlook* pathway suggests that demand may reach the equivalent of 7 GWh of hydrogen energy, which would be sourced through imports. A portion of this demand is expected to support vessels and aircraft operating between the mainland and the islands suggesting that ports and airports in Cornwall could act as supply hubs supporting Cornwall and the islands.

Biofuels

Hydrotreated Vegetable Oil (HVO), a type of drop-in liquid biofuel, can be used directly in existing diesel engines and oil boilers with no or minimal modification. HVO has been modelled to transition some of the inter-island marine activity under the *Best Outlook* scenario.

Supporting actions

The Cornwall and Isles of Scilly renewable headline action areas (see Table 8 in the Cornwall LAEP section) relevant to the islands focus on:

- Engaging with government's energy policy and funding initiatives
- Developing smart local energy systems and fostering innovation
- Integrating renewable energy into spatial and land-use planning
- Expanding rooftop solar deployment
- Supporting community-led energy initiatives and ensuring local benefits
- Advancing innovative renewable technologies
- Promoting the supply and use of alternative fuels

The Isles of Scilly-specific actions that have been recommended to support the uptake of renewable energy, alternative fuels and energy independent farming on the islands are set out below.

8.2.1 IoS engagement with NGED

Establish a stakeholder forum with NGED to ensure that the island's future energy needs are met.

8.2.2 IoS community energy network

Support development of a Community Energy Network for the islands to retain economic benefits of local renewables within the community.

8.2.3 IoS community owned renewables

Support the development of community owned renewable energy projects.

8.2.4 IoS energy storage

Conduct a feasibility study on energy storage across the islands to maximise opportunities for renewable generation and to alleviate grid constraint issues.

8.4.1 IoS agricultural machinery

Work with farmers and land managers, including the Duchy of Cornwall to develop options for decarbonisation of agricultural machinery that are practical for the islands' scale.

Case study: spotlight on the Isles of Scilly Community Venture

The Isles of Scilly Community Venture is a not-for-profit Community Interest Company established as a part of the legacy of the Smart Islands Programme. This pioneering initiative aimed to create a more sustainable and resilient infrastructure for the islands, was part funded by the European Regional Development Fund (ERDF). The Smart Islands programme was delivered through a collaborative partnership that included Hitachi Europe, the Council of the Isles of Scilly, the Duchy of Cornwall, Tresco Estate, and the Islands' Partnership, with technical expertise provided by Moixa and PassivSystems.

One of the programme's standout achievements is the Go-EV project, which launched a fleet of electric cars and vans through a community car share scheme. Supported by 24 EV charging points—some powered by solar canopies with vehicle-to-grid technology—the system allows vehicles to return electricity to the grid during peak times. The Go-EV community car share service, which is managed by the Community Venture, offers residents, local businesses, and eligible visitors affordable, pay-per-use access to electric transport. Providing a flexible, low-cost alternative to car ownership that helps reduce the number of vehicles required on the islands while supporting the shift to low-carbon transport.

Images courtesy of Isles of Scilly Community Venture

The Community Venture is currently leading the Community Energy Network (CEN) project, part-funded by the UK Government's Shared Prosperity Fund. This initiative aims to transform energy generation and consumption across the islands by integrating locally owned solar assets into a smart, community-driven energy network. In collaboration with CEN project partner, Energy Local, the project is developing a local energy tariff that gives residents and businesses access to cheaper, renewable electricity—helping to lower energy bills and retain more economic value within the local area.

By anchoring renewable energy in community ownership, the Community Venture can help to ensure that profits from local generation remain on the islands. These funds can be reinvested into essential services, energy efficiency upgrades, and social initiatives—helping create a self-sustaining community benefit cycle.

Looking ahead, the Community Venture could play a key role in the Isles of Scilly' transition to a net-zero energy system. From installing and maintaining renewable technologies to offering energy advice and digital tools, it can help create green jobs and strength local resilience by embedding the benefits of the energy transition within the islands' community.

Net Zero Buildings Mission

> We will stop using fossil fuels, ensuring our buildings are zero carbon and energy efficient where possible (29)

Buildings accounted for over 95% of the Isles of Scilly's total energy demand—approximately 32 GWh out of 33.7 GWh (2019). As such, they will need to represent a key focus for efforts to transition the islands' towards more affordable, secure and clean energy. This LAEP identifies two key intervention areas: fabric retrofitting and heating system upgrades. While the fabric and heat measures are discussed separately, they are complementary and should be implemented as an integrated package.

Homes

As approximately 54% of homes on the Isles of Scilly are rented (either privately rented or social homes) (7), the proposed increase of the Minimum Energy Efficiency Standard (MEES) to EPC C by 2030, is expected to be applicable to all non-exempt private rented homes, along with any forthcoming requirements introduced for social homes. The MEES could potentially be a more significant driver for home energy performance improvements on the Isles of Scilly than the mainland.

Homes: fabric retrofit

Approximately 87% of homes in the Isles of Scilly have an EPC rating of D or below, with a large proportion in the private rented sector and therefore subject to the Domestic MEES. This highlights a significant opportunity to improve the energy efficiency of the islands' housing stock. The *Best Outlook* scenario modelling applied a simplified method to assess each property's potential for fabric improvements. This approach considered both a set of low-regret, basic fabric upgrades and a more comprehensive extensive retrofit package designed to significantly improving the energy efficiency of homes.

Low-regrets:	Extensive:
Measures likely to have a relatively short payback period, low capital cost, low disruption.	Measures likely to have a longer payback, higher upfront investment, but can save more energy.
Assumed as a minimum for all suitable Isles of Scilly's domestic building stock.	Assumed for buildings where the retrofit model found the opportunity to do so.

The retrofit interventions modelled in this LAEP are projected to deliver a 7% reduction in the energy demand from heating across the islands' housing stock (Figure 31).

To ensure the energy performance of the islands' homes have been improved ahead of the installation of heat pumps or other low-carbon heating systems, basic fabric upgrades should be completed prior to the proposed ban on the installation of new oil boilers. As such, the widespread deployment of low-regret fabric upgrades were modelled before 2035 in the *Best Outlook* pathway.

The assessment carried out for this LAEP acknowledges that standard energy efficiency measures may not be suitable for all homes. In particular, some harder-to-treat properties on the Isles of Scilly—such as listed buildings or those with traditional construction—will require specialist retrofit solutions (see *Responsible Retrofit for Traditional Buildings* (8)).

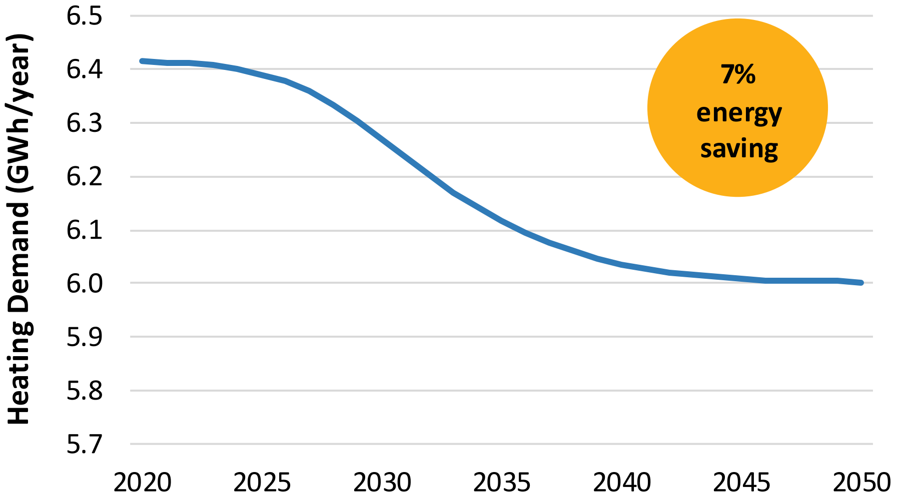


Figure 31: Impact of domestic retrofitting on existing heating energy demand

Prioritising the retrofit of homes with the lowest energy performance—particularly those rated EPC F or G—will be essential (Figure 32). However, it is equally important to address rented homes rated EPC D or below. This includes both social housing (9% of homes) and private rentals (41%), which may be subject to future changes in the Minimum Energy Efficiency Standards (MEES) or equivalent social housing regulations.

On the Isles of Scilly, social housing is primarily concentrated in Hugh Town and Old Town on St Mary's. In contrast, private rented and owner-occupied homes with low EPC ratings are more widely dispersed across all inhabited islands, presenting a broader geographic challenge for retrofit delivery.

The estimated capital cost of improving the energy efficiency of homes across the Isles of Scilly is approximately £2.44 million through to 2050. This investment will be critical in addressing fuel poverty, reducing emissions, and improving living conditions across the islands.

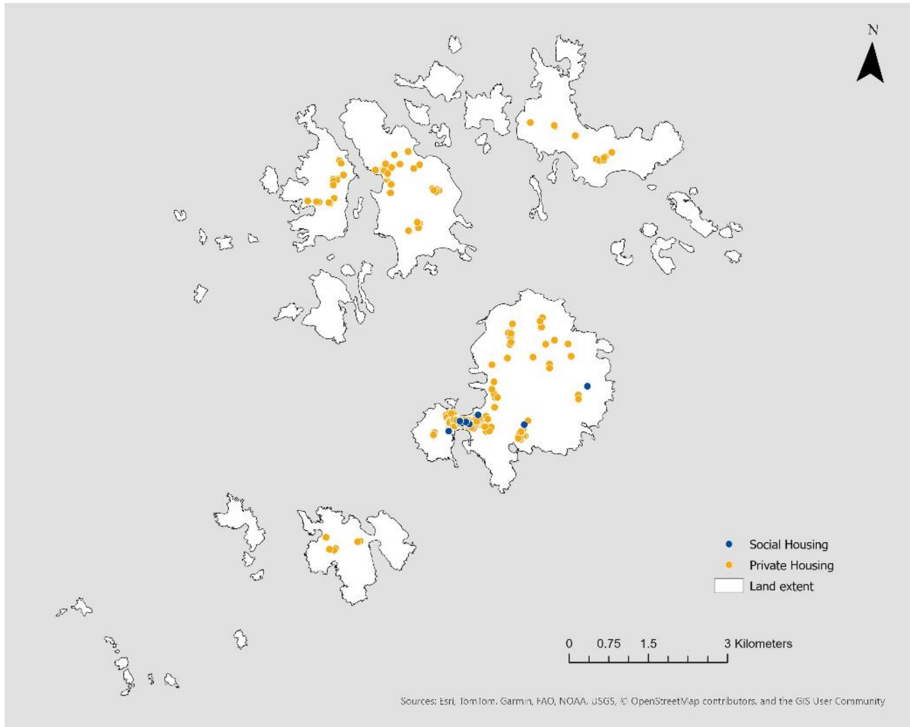


Figure 32: Mapping of the locations of social housing and low-energy performance homes on the Isles of Scilly (Contains OS data © Crown copyright) (6) (9) (10)

Estimated total capital cost **£2.4mn**

Homes: low carbon heating

Homes account for approximately one-third of the Isles of Scilly's carbon emissions, with most of this coming from energy used for heating 'space' and hot water. As the islands are not connected to the gas grid, the majority of properties rely on heating oil or electric heaters. Some homes lack central heating altogether, instead using energy-inefficient storage heaters, electric fires, or radiators.

Replacing costly and carbon-intensive oil boilers with heat pumps, or smart direct electric heating, and energy efficient heat storage systems could reduce both residents energy bills and emissions. The rising cost of electric heating and the expense of importing heating fuels from the mainland highlights the opportunity presented by prioritising the rapid transition of suitable homes to more efficient electric heating systems.

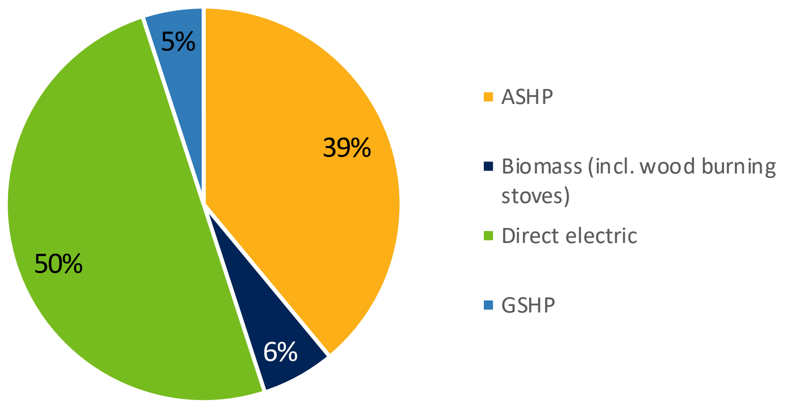


Figure 33: Split of heating technologies in 2050 for domestic properties

Figure 33 illustrates the projected distribution of heating technologies in the *Best Outlook* scenario in 2050, with Figure 34 showing the modelled low-carbon heating system installation rate and the corresponding decline in fossil fuel-based heating on the islands. For more detailed information on the technologies involved, refer to the domestic low carbon heat section in the Cornwall Summary and Action Plan.

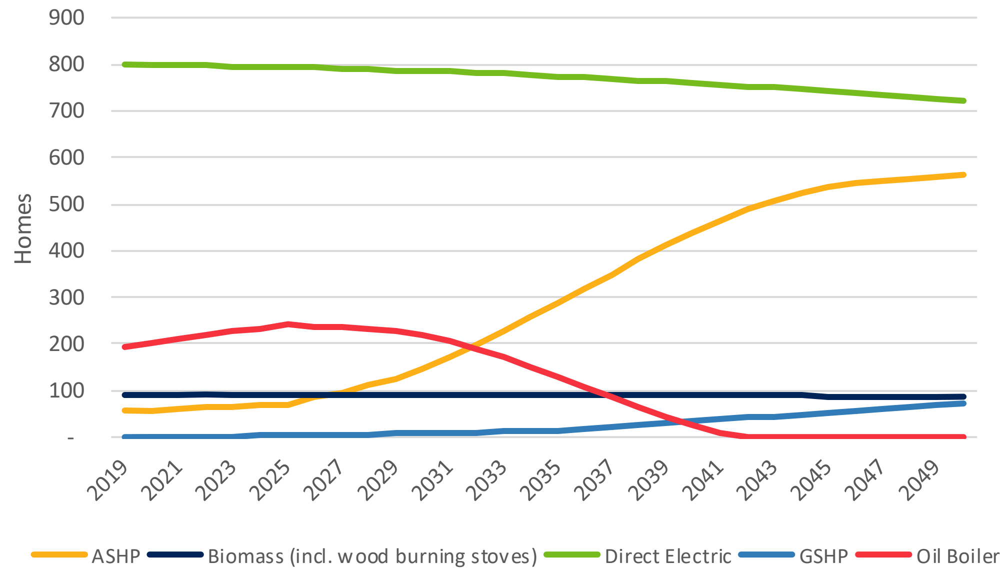


Figure 34: Rate of deployment of domestic heating technologies (existing and new buildings)

Transitioning to clean home heating in the Isles of Scilly is estimated to cost £6.72 million up to 2050.

£ Estimated total capital cost **£6.7mn**

Non-domestic buildings

Non-domestic buildings: fabric retrofit

The fabric retrofit requirements for the Isles of Scilly's non-domestic buildings are more uncertain than those for the islands' homes due to the wide variation in construction types. For the purposes of this LAEP, a simplified modelling approach was used to evaluate the suitability of the islands commercial, public, and other non-domestic buildings for two levels of retrofit fabric improvements: a universally applied low-regrets fabric improvement package, and a more extensive set of fabric improvement measures applied to 6% of the islands' non-domestic buildings.

Low-regrets retrofit:	Extensive retrofit:
Measures with a relatively short payback period (years).	Longer payback, higher upfront investment.
Assumed for all non-domestic buildings.	Assumed for 6% of non-domestic buildings: all public sector with some privately owned.

The estimated capital cost for fabric improvements in non-domestic buildings up to 2050 is £4.47 million, with the majority of this cost expected to be borne by building owners. However, the modelled retrofit measures are projected to reduce energy demand by 19%, with most interventions proving to be cost-effective—delivering payback to building owners within a relatively short timeframe.

Estimated total capital cost **£4.5mn**

Non-domestic buildings: low carbon heating

The EPC data coverage for non-domestic buildings in the Isles of Scilly is limited. As such, targeting of non-domestic buildings for clean heating system installations must be carried out on a case-by-case basis – based on property-level assessments and local knowledge.

Replacing heating systems in the islands' non-domestic buildings with clean heating systems has been estimated to cost in the order of £2.76 million up to 2050.

Estimated total capital cost **£2.8mn**

Supporting actions

Five key action areas have been identified to help promote the transition towards more affordable, secure and clean energy use in buildings across both Cornwall and Isles of Scilly (see Table 9 in the Cornwall LAEP section for details):

- Supporting low income and vulnerable households
- Decarbonising existing housing
- Heat zoning and networks
- Net zero building standards
- Low carbon cooling

Decarbonising Transport Mission

Road transport

Road transport interventions for the Isles of Scilly have been developed following the 'Avoid-Shift-Improve' framework. This approach prioritises reducing the need for private vehicle by encouraging a shift towards walking, cycling, and the use of public and shared transport, ahead of transitioning to zero-emission vehicles.

We will ensure our transport infrastructure supports clean safe methods of travel, promoting active travel were possible (29)

During the development of this LAEP, a range of options for moving towards more sustainable road transport on the islands were assessed, including promoting modal shift, active travel and replacing conventional petrol and diesel vehicles (cars, LGVs, HGVs, and mini-buses) with low- and zero-emission alternatives. In line with national and regional goals, it is expected that most cars, vans, and buses on the islands will transition to battery electric vehicles. However, for some HGVs, HVO is considered to be suitable as a 'drop-in' alternative fuel.

Currently, cars are the largest contributors to road transport emissions on the islands (Figure 35). However, these emissions are projected to decline rapidly as the EV market matures. In contrast, HGVs are expected to transition more slowly, with full adoption of zero-emissions heavy vehicles not anticipated until 2050.

The total capital cost to transition the islands' road transport sector is estimated at £35.9 million by 2050. The majority of these costs, which relate to replacing vehicles, will need to be distributed among vehicle owners, rather than being borne by the Council of the Isles of Scilly. A detailed breakdown of the estimated costs is presented in Figure 36.

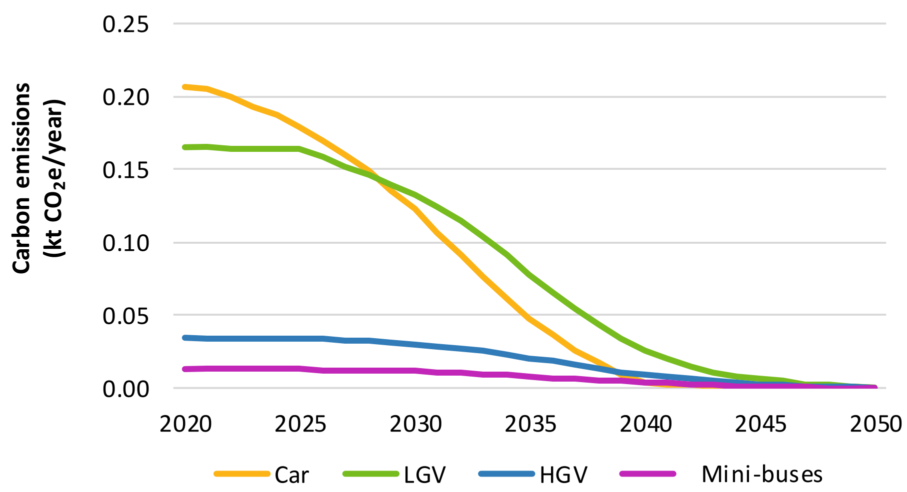


Figure 35: Carbon emissions from road transport

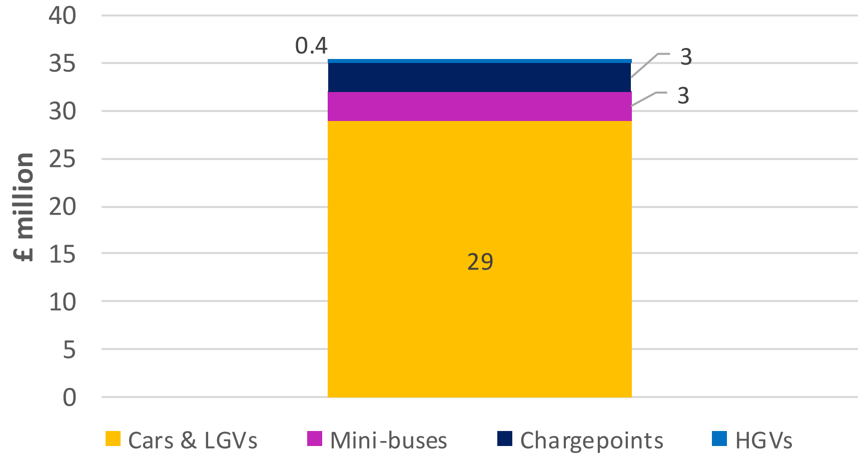


Figure 36: Total cost of decarbonisation of road transport

Estimated total capital cost **£35.9mn**

Maritime

The maritime activities considered in this LAEP analysis include mainland passenger and freight services, inter-island ferry operations, recreational boating, workboats, and commercial fishing vessels. St Mary's Harbour has been identified as a priority location for alternative fuelling infrastructure to support vessels traveling to and from the islands, as well as inter-island operations, fishing vessels, and workboats based in Hugh Town.

Stakeholder engagement highlighted strong interest in developing hydrogen refuelling facilities at St Mary's Harbour to enable future deployment of hydrogen-powered vessels. The analysis recommends installing at least one electric charging station for electric vessels, including potential replacements for the Lyonesse Lady freight vessel. Charging infrastructure should be located where vessels berth.

Due to limited space and infrastructure, the smaller off-island harbours and anchorages are not considered suitable for hydrogen or electric refuelling facilities.

Aviation

The key aviation routes within the scope of this LAEP are the St Mary's–Cornwall Skybus service and the Penzance Helicopters service. These routes have been modelled for decarbonisation using hydrogen and a sustainable aviation fuel (SAF)/jet fuel mix, respectively.

To support this transition, it may be necessary to deploy alternative fuel refuelling infrastructure at St Mary's Airport and Tresco Heliport. However, further stakeholder engagement and technical analysis is required to determine the specific infrastructure needed to enable the future fuelling needs of aircraft travelling to and away from the islands.

Isles of Scilly Clean Maritime Corridor - Feasibility study

Artemis Technologies, in collaboration with FRS Group, Connected Places Catapult, and the Council of the Isles of Scilly, is leading a pioneering feasibility study to improve year-round connectivity between Newlyn and St Mary's.

The Isles of Scilly Clean Maritime Corridor project represents a £703 thousand investment to assess the feasibility of whether the Artemis eFoiler® ferry could provide a reliable, clean, and affordable year-round transport link between Cornwall and St Mary's has been part-funded through a £494 thousand grant from the UK Government through the UK Shipping Office for Reducing Emissions (UK SHORE) programme.

The Department for Transport's UK SHORE programme supports the development of technologies that will decarbonise the UK maritime sector and unlock associated economic opportunities.

The Artemis EF-24 Passenger ferry is a fully electric vessel which uses eFoiler® technology. Designed for zero-emission operation, the Artemis eFoiler passenger ferry offers enhanced stability in rough seas, reduced wake, and improved reliability, particularly during winter months when conventional transport options are limited.

The project also considers the development of shoreside charging infrastructure, integration with local transport systems, and regulatory pathways to support clean maritime operations. It is one of several UK SHORE-funded initiatives showcasing innovative vessels and infrastructure across UK ports and harbours in 2025.

If proven viable, and an Artemis eFoiler passenger ferry could be deployed, the electrification of the St Mary's - Cornwall service could help reduce emissions associated with travel between the islands and the mainland faster than modelled in the Best Outlook pathway.

Supporting actions

Six key action areas have been identified to help transition transport across both Cornwall and Isles of Scilly (see Table 14 in the Cornwall LAEP section for details):

- Planning for transport
- Fleet decarbonisation
- Demand reduction and modal shift
- Rail connectivity and decarbonisation
- Green travel planning
- Maritime and aviation decarbonisation

The recommended near-term Isles of Scilly-specific transport actions are below.

8.3.1 Transport to and from IoS

Identify decarbonising options for transport to and from the islands, working with stakeholders and partners.

8.3.2 Inter-island boating

Identify decarbonisation options for inter-island boating, working with stakeholders and partners.

8.3.3 IoS EV infrastructure

Ensure that our EV infrastructure meets future needs.

8.3.4 IoS community transport

Reduce the need for people to own a car by delivering the Isles of Scilly Local and Cycling Walking Infrastructure Plan to encourage safe walking, cycling and wheeling.

8.3.5 IoS active travel

Seek opportunities for the introduction of a zero emissions year-round community transport.

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