



ANNUAL REVIEW

2016-2017

FOREWORD

Welcome to **Scottish Renewables' 2016/17 Annual Review**, where we outline the activities carried out by the organisation across our policy, communications and events teams, as well as outcomes achieved on behalf of our members.

It's been a busy 12 months for Scottish Renewables, with some notable outcomes including:

- Publication of the Scottish Government's draft [Energy Strategy](#), including Scottish Renewables' [proposed 2030 target](#) for renewables to generate the equivalent of 50% of all Scotland's energy needs
- Commitment in the UK [Conservative Party manifesto](#) to "continue to lead international action against climate change" and "maintain our position as a global leader in offshore wind and support the development of wind projects in the remote islands of Scotland"
- Reforms announced to the [Renewable Heat Incentive](#), including increases in support for domestic heat pumps and tariff uplifts for new domestic biomass and biomethane injection, while retaining solar thermal within the scheme
- Secured business [rates relief](#) for the worst-affected renewables schemes and saw our key recommendations for rates reform echoed in the independent Barclay Review report
- "Deliver affordable energy and clean growth" formed a key priority in the UK Government's [Industrial Strategy](#) Green Paper

Renewable energy continues to be Scotland's main source of electricity – generating more power than nuclear, gas or coal – and we've seen further deployment of renewable heat across Scotland.

LOOKING AHEAD

The next 12 months will be crucial for our industry as we continue to provide a strong, united voice across a range of debates, including:

- **Scotland and the UK's future relationship with Europe**
- **future market frameworks for renewable heat, power and integrated systems**
- **the review of planning frameworks onshore and offshore**
- **and the implementation of a new energy strategy for Scotland and new Industrial and Clean Growth strategies for the whole of the UK.**

As ever, Scottish Renewables will continue to work hard on behalf of our members to foster the optimum conditions for the sustainable growth of Scotland's renewable energy sector.

Claire Mack



Chief Executive
Scottish Renewables

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Scottish Renewables develops and campaigns for policy positions which help drive the sustainable growth of Scotland's renewable energy sector while delivering wider economic, environmental and social benefits.

STRATEGY AND VISION TO ENCOURAGE INVESTMENT:

- Secured business [rates relief](#) for the worst-affected renewables schemes and saw our key recommendations for rates reform echoed in the independent Barclay Review report:
 - More frequent revaluation cycles
 - Review of relevant valuation regulations
 - Increased transparency and consistency
- Recommendations in the [final report](#) of the UK Parliament's Energy and Climate Change Committee in October 2016 supported many of the points raised in Scottish Renewables' submission and led to the Committee recommending that Government incentivise energy storage and demand side response

SECURED BUSINESS RATES RELIEF FOR THE WORST-AFFECTED RENEWABLES SCHEMES

- Secured an [Ofgem-led review of network charging arrangements](#) in line with [our response to the consultation on a Smart Flexible Energy System](#)

SECURING A ROUTE TO MARKET:

- Commitment in the UK [Conservative Party manifesto](#) to "continue to lead international action against climate change" and "maintain our position as a global leader in offshore wind and support the development of wind projects in the remote islands of Scotland". The lack of specification on established technologies for projects outwith England leaves the door open for potential future support.
- Reforms announced to the [Renewable Heat Incentive](#), including increases in support for domestic heat pumps and tariff uplifts for new domestic biomass and biomethane injection, while retaining solar thermal within the scheme
- Inclusion in the draft [Scottish Energy Strategy](#) of a commitment to explore the creation of a Scottish Renewable Energy Bond, as proposed by Scottish Renewables
- [Scottish Renewables-commissioned study](#) showing [most competitive onshore wind could proceed without subsidy](#) was referenced in the Committee on Climate Change's [2017 Report to Parliament](#)



SUPPORT FOR INNOVATION AND COST REDUCTION:

- UK Government commitment to allocate [£246 million to development of battery technology](#)
- Continuation of Wave Energy Scotland, with [£2.84 million of funding allocated](#) to projects in 2017

OPTIMAL REGULATORY FRAMEWORK FOR SUSTAINABLE GROWTH:

- Publication of the Scottish Government's new, whole-system draft [Energy Strategy which included Scottish Renewables' proposed 2030 target](#) for renewables to generate the equivalent of 50% of all Scotland's energy needs
- [Commitment](#) from Scottish Conservatives, in a major policy paper on the environment, to support Scottish Renewables' call for a target that 50% of all energy should be sourced from renewables by 2030
- "Deliver affordable energy and clean growth" formed a key priority in the UK Government's [Industrial Strategy](#) green paper, which aims to "coordinate changes to energy infrastructure triggered by new technologies" and commits to a "programme of research and innovation in energy storage and other smart technologies"

- Recommendations including the consideration of a risk mitigation mechanism for pumped storage hydro, outlined in a paper which Scottish Renewables commissioned on behalf of the UK Pumped Storage Hydro Working Group, were included in [the draft Scottish Energy Strategy](#)
- Represented views of membership on changes to planning fees in Scotland. Continued to highlight issues when Scottish Renewables recommended that fees could be increased in conjunction with measures to improve the planning service were disregarded.
- Recommendations made in Scottish Renewables' oral and written representations to the Scottish Parliament's [Economy, Jobs and Fair Work Committee's](#) inquiry on the draft Scottish Energy Strategy were clearly reflected in many of the Committee's recommendations
- Worked in conjunction with the [Electricity Networks Association](#) and [ScottishPower Energy Networks](#) to develop grid connection queue management policies designed to ensure projects ready to connect to the network can progress quickly
- Represented views of distribution connections stakeholders via Ofgem's [Incentive on Connections Engagement process](#)
- Continued to campaign for clarity on the Feed-in Tariff post 2019, and made representation to BEIS and Ofgem on specific regulatory issues, such as on [replacing generating equipment](#)

LEADING THE DEBATE

Scottish Renewables leads thinking by developing data and producing briefings, research and analysis on current and future challenges to the growth of renewables in Scotland.

PUBLICATIONS & RESEARCH

- [Published study by Baringa Partners](#) showing [most competitive onshore wind](#) projects could proceed without subsidy
- [Published paper](#) illustrating the [industrial impact of the renewables industry](#) in Scotland
- On behalf of industry stakeholders, commissioned [this report by DNV GL into the benefits of pumped storage hydro](#)
- Worked with a number of representatives of the biomass industry in Scotland to produce [recommendations on biomass heat](#) to help inform the Scottish Government's draft Energy Strategy
- [Produced research](#) to assess the [impacts of changes to the transmission loss charging methodology](#)
- Update quarterly renewable energy statistics on the Scottish Renewables website based on official government figures

BRIEFING PAPERS

- Produced a member-only [briefing](#) outlining the contents of the Scottish Government's draft Energy Strategy
- Produced a member-only [briefing](#) outlining the contents of the Scottish Government's draft Climate Change Plan
- Prepared a [blog](#) on the issue of embedded benefit setting out what it is and why it matters

REPRESENTATION

- Represented Scottish Renewables members on the following Government and industry groups:
 - First Minister's Energy Advisory Board (Scottish Government)
 - Co-Chair of Renewables Industry Advisory Group (Scottish Government)
 - Scottish Islands Renewables Delivery Forum (UK-Scottish Government)
 - Offshore Wind Industry Group (UK-Scottish Government)
 - Offshore Renewables Energy Licensing Group (Marine Scotland & UK MMO)
 - Strategic Advisory Group for Crown Estate Devolution
 - Scottish Offshore Renewables Research Framework Coordination Group (Scottish Government)
 - Offshore Wind Regional Advisory Groups (Scottish Government)
 - Energy Networks Association Open Networks Project Advisory Group
 - Energy Networks Association Distributed Energy Resources Steering Group
 - Energy Technology Partnership Advisory Group
 - Scottish Wind Farm Bird Steering Group (SNH-Scottish Government)
- Continued to represent renewables industry to bodies conducting a range of regulatory reforms affecting grid charging. This has included responding to technical code modifications, Ofgem's Targeted Charging Review and National Grid's Charging Review.
- Continued to engage with Scottish Natural Heritage on wild land designation issues, including responding to SNH's consultation on Assessing Impacts on Wild Land Areas - technical guidance
- Worked with a group of trade associations to seek a solution which allows for valid replacements of generating equipment in receipt of the Feed-in Tariff over the lifetime of a project
- Launched a new DG Connections Group to tackle growing distributed generation, rapid innovation across the networks and regulation which is developing to promote a smart and flexible energy system

TELLING OUR STORY

We communicate the benefits of renewable energy in Scotland clearly, constructively and credibly, and rebut misleading attacks on the sector to our key audiences in parliament, government and the media.

- Polled member companies on their export activity, then collated data and issued a [press release](#) highlighting that Scottish renewable energy businesses have been involved in projects worth £125.3 million in 43 countries on every continent bar Antarctica – and employ staff in 22 of those countries. This story was covered widely by media including the Daily Record, Press and Journal and multiple trade publications.
- Worked closely with 32 companies across Scottish Renewables membership and more widely to produce a document titled [Industrial Impact: The Power of Scotland's Renewables Sector](#). Eventually submitted as part of [our response to the UK Government's Industrial Strategy consultation](#), the report used images and case studies to show the economic and employment benefits of Scotland's investment in clean energy to date.
- [Scottish Renewables' Employment Trends and Business Confidence survey](#) asked respondents how they feel about the future of the renewables sector over the coming year. 41% said they feel either quite or very negative, while the same number said they are "neutral" about the year ahead. The survey achieved media coverage on BBC, Recharge and in theHerald, among others.
- Celebrated 20 years of Scottish Renewables by holding a members' forum, which was addressed by directors past and present and Chris Stark, Scottish Government Director of Energy and Climate Change, who took the opportunity to answer questions on the upcoming Energy Strategy
- Kept members up to date on the introduction of the Scottish Parliament's Lobbying Register, which is expected to come fully into force in early 2018
- Informed members about changes to key posts at Holyrood and Westminster, including providing information on the [new Ministerial team](#) for the Department for Business, Energy & Industrial Strategy (BEIS), which was announced on 12 June

POLITICAL ENGAGEMENT

- Published Scottish Renewables' manifesto for the 2017 UK General Election, [Delivering Affordable Energy and Clean Growth](#), where we set out a series of recommendations to ensure the right policy framework to unlock the investment, research and innovation required to deliver a secure, modern and low-carbon energy system
- Held a UK Parliament reception addressed by Angus MacNeil MP and attended by Scottish MPs and Lords, and a Scottish Parliament Reception addressed by Gail Ross MSP and attended by MSPs and stakeholders
- Cabinet Secretary for the Economy, Jobs and Fair Work, Keith Brown MSP, delivered the keynote address at the Scottish Green Energy Awards
- In regular contact with MSPs, MPs, UK and Scottish Government Ministers and Special Advisers
- Held our first exhibition at the Scottish Parliament to help improve engagement with MSPs and officials and mark the organisation's 20th anniversary
- Held a number of meetings via the Scottish Parliament Cross Party Group on Renewable Energy and Energy Efficiency
- Conducted a survey of MSPs to understand the awareness of and regard for the organisation within the Scottish Parliament. Survey results showed Scottish Renewables continues to be one of the most well-known and respected membership organisations.
- Gave [oral evidence](#) to the Scottish Parliament's Economy, Jobs and Fair Work Committee on the Scottish Government's draft Climate Change Plan and Energy Strategy, and submitted [written evidence](#) to that committee as well as the Environment, Climate Change and Land Reform Committee, the Rural Economy and Connectivity Committee and the Local Government and Communities Committee

- Submitted [written evidence](#) to the House of Lords Economic Affairs Committee [inquiry into the Economics of UK Energy Policy](#)
- Issued briefings to MSPs ahead of Scottish Parliament debates on 'How Scotland's innovation centre programme is driving innovation in Scotland' and on Support for Scotland's Renewables
- Scottish Renewables [responded](#) to BEIS' Green Paper Building our Industrial Strategy, highlighting how Scotland's renewables sector can deliver many of the Strategy's objectives, including recommendations on how Government can help secure and grow those industrial benefits
- Continued to engage with media by meeting and briefing journalists writing for the Financial Times, The Times, Herald, Scotsman, Sunday Express, Offshore Engineer, Renew, Courier, BBC Scotland, Stirling Observer, Ayrshire Post and STV News
- Wrote letters to newspaper editors rebutting renewable energy myths
- Engaged with members, politicians, journalists and stakeholders on social media: grew Scottish Renewables' Twitter following by 13% and LinkedIn following by 21% in 12 months to more than 14,000 and 2,600 respectively

MEDIA

- Worked with journalists to provide accurate, referenced data and comment in response to 140 media enquiries
- Maintained Scottish Renewables' high profile through regular contributions to media outlets including interviews for the Financial Times, Washington Post and Utility Week (print/online); BBC Radio 4 and Good Morning Scotland (radio); BBC Reporting Scotland and Channel 9 News (TV, Australia)
- Issued more than 65 press releases and proactive statements to local, national, international and trade media on a range of topics including the changes to [Business Rates in Scotland](#), studies which showed the value of offshore wind and the [the draft Scottish Energy Strategy](#)
- Worked with member companies to create news releases and opinion articles on topics including the export activity of Scotland's renewable energy industry, the rise of driverless electric vehicles and the potential to develop a green bond market in the UK
- Continued to develop Scottish Renewables' policy blogs, attracting more than 2,500 views in 12 months on topics including the future of the Levy Control Framework, what industry can do to fill its skills gap and what transmission loss fee changes mean for Scotland. Our most popular blog, on the rise of the corporate PPA, has been read almost 300 times and included contributions from Scottish Renewables members Pinsent Masons and K2 Management
- Wrote, published and promoted blogs covering key points and outputs from Scottish Renewables conferences
- Worked with stakeholder organisations including Scottish Water, WWF Scotland, the National Trust for Scotland, Business Gateway, BT, the Chartered Institute of Procurement and Supply, EY and Transport Scotland to promote renewable energy, explore new routes to market, assist in the production of PR materials and rebut renewable energy myths
- Co-ordinated media coverage for member companies and provided communications advice around announcements and on securing coverage from journalists

ADDING VALUE

Through our extensive events programme and strategic partnering we provide our members with an opportunity to network, share information and learn from colleagues working across the sector.

CONFERENCES AND AWARDS

- The Scottish Green Energy Awards, 01 December 2016, Edinburgh
- Offshore Wind Conference, Exhibition & Dinner, 23-24 January 2017, Glasgow
- Low-Carbon Cities Conference, 22 February 2017, Edinburgh
- Annual Conference, Exhibition & Dinner, 21-22 March 2017, Edinburgh
- Scottish Low-Carbon Heat Conference, 16 May, Glasgow (Part of the Euroheat & Power Congress)
- Young Professionals Green Energy Awards, 25 May 2017, Glasgow
- Hydro Conference & Exhibition, 06 June 2017, Perth
- Onshore Wind Conference & Exhibition, 20 June 2017, Glasgow
- Storage & Systems Conference, 21 June 2017, Glasgow
- Solar Conference & Exhibition, 06 September 2017, Edinburgh
- Marine Conference, Exhibition & Dinner, 12-13 September 2017, Inverness

CPD SEMINARS

- Introduction to the Renewable Heat Incentive, 01 February 2017, Glasgow
- Feasibility and Site Selection: Electricity Storage, 08 March 2017, Glasgow
- Corporate PPA, 26 April 2017, Glasgow
- Introduction to the Electricity Network: Charging & Regulation, 30 August 2017, Glasgow
- Introduction to Hydrogen & Opportunities for Renewables, 28 September 2017, Glasgow

MEMBER EVENTS

- Maximising the Value of Your Assets, 05 October 2016, Edinburgh
- District Heating, 28 February 2017, Glasgow
- Introduction to Communications, 15 March 2017, Glasgow
- Hydro Strategy Day, 24 November 2016, Glasgow
- Member Network Event with the Department for Business, Energy & Industrial Strategy, 29 November 2016, Edinburgh
- System Flexibility Consultation, 19 December 2016, Glasgow
- Onshore Wind, 14 March, Glasgow
- Members Forum & AGM, 28 March 2017, Glasgow
- Parliamentary and Member Receptions
- Westminster Reception, 19 October 2016, London
- Scottish Parliamentary Reception, 11 January 2017, Edinburgh

EXTERNAL EVENTS

- Exhibited at All-Energy, 10 & 11 May 2017, Glasgow

YOUNG PROFESSIONALS IN RENEWABLES NETWORK

- Worked with Scottish Renewables members BayWa r.e. and Pinsent Masons to organise two Young Professionals in Renewables events, where the next generation of leaders in our industry have the chance to hear from senior figures in the sector:
02 November 2016, Glasgow
10 May 2017, Glasgow

MEMBER ENGAGEMENT

Continued to engage with members and receive feedback on all policy areas through our member networks, keeping you up to date and involved in our work on:

- Bioenergy
- Economics & Markets
- Grid & Systems
- Low-Carbon Heat
- Hydropower
- Wave & Tidal
- Offshore wind
- Onshore wind
- Solar
- Storage

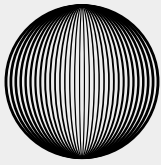
INFORMATION AND UPDATES

- Daily Briefing
- Monthly Briefing
- Email alerts on breaking policy issues

PARTNERSHIPS

- Scottish Institute for Solar Energy Research (SISER)
- RenewableUK
- Highlands and Islands Enterprise
- Scottish Development International
- Offshore Renewable Energy Catapult
- Wave Energy Scotland

EVENTS CALENDAR 2017/18



**THE SCOTTISH
GREEN ENERGY
AWARDS**

30 NOVEMBER EDINBURGH

**OFFSHORE WIND
CONFERENCE,
EXHIBITION & DINNER**

29 & 30 JANUARY GLASGOW

**LOW-CARBON
CITIES
CONFERENCE**

20 FEBRUARY EDINBURGH

**ANNUAL
CONFERENCE**

26 & 27 MARCH EDINBURGH

**LOW-CARBON
HEAT
CONFERENCE**

24 APRIL GLASGOW

**HYDRO
CONFERENCE
& EXHIBITION**

8 MAY PERTH

**YOUNG PROFESSIONALS
GREEN ENERGY
AWARDS**

24 MAY GLASGOW

**ONSHORE WIND
CONFERENCE
& EXHIBITION**


12 JUNE GLASGOW

**STORAGE
& SYSTEMS
CONFERENCE**

13 JUNE GLASGOW

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