



ANNUAL REVIEW **2017-2018**



FOREWORD

The past 12 months have seen no let-up in Scottish Renewables' efforts to grow Scotland's renewable energy sector and sustain its position at the forefront of the global clean energy industry.

While Brexit dominates headlines our industry has continued to grapple with ongoing challenges: the future of mainland onshore wind and large-scale solar, the end of the Feed-in Tariff, continued slow progress on renewable heat and the passage of the Planning (Scotland) Bill through Parliament at Holyrood.

Because we represent all renewable energy technologies, my team and I have been active on all these issues and more.

We were instrumental in securing Scotland's new 50% all-energy 2030 target for renewables, while the first holistic Scottish Energy Strategy included many of our policy asks to grow the sector.

Our long-running campaign to secure a route to market for Scotland's remote island wind projects also paid dividends, with BEIS confirming their inclusion in the next CfD auction round in 2019.

We led coordinated industry action on the Feed-in Tariff (as Hannah describes on page [five](#)) and significantly increased pressure on government around Contracts for Difference eligibility for mainland wind and large-scale solar (page [three](#)).

Through these policy challenges we've worked to keep members informed, connected and united. We delivered 10 policy-focussed conferences, two award ceremonies and six free member events, as well as seminars on topics as diverse as refinancing, planning and in onshore wind life extension. We've continued to work to inform politicians and policy makers at both Scottish and UK levels while advocating for our industry to targeted audiences on a range of platforms. TV and print media have remained key, while we've also used blogs to great effect and continued to grow our reach on social media, communicating with audiences in the most relevant and impactful ways possible.

In this year's Annual Review we've attempted to provide a flavour of our work through 2017-18, but this is by no means an exhaustive document. More detail on the points is available on our website, and particularly in our archive of Monthly Briefing emails, which provide an in-depth look at Scottish Renewables' work, delivered to members by email every month.

We look forward to continuing to work with you to deliver a clean, bright energy future for Scotland in 2019 and beyond.

Claire Mack
Chief Executive



CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Scottish Renewables develops and campaigns for policy positions that contribute to the sustainable growth of Scotland's renewable energy sector while delivering demonstrable economic, environmental and social benefit.

Scotland's first whole-system [Energy Strategy](#) — called for by Scottish Renewables — was published by the Scottish Government, with targets for renewable and low-carbon heat, power and transport. A target that 50% of all Scotland's energy should come from renewable sources by 2030 — [first suggested by Scottish Renewables](#) — was contained in the final version of the Scottish Energy Strategy.

IN 2017-18 SCOTTISH RENEWABLES MADE THE CASE FOR RENEWABLES IN MORE THAN 40 CONSULTATION RESPONSES, SUBMISSIONS TO CALLS FOR EVIDENCE AND LETTERS TO MINISTERS TO INFLUENCE GOVERNMENT POLICY AND REGULATION

ECONOMICS & MARKETS

- Scottish Renewables successfully worked with the Scottish Government, developers and island communities to make the case to UK Government that projects in the Western Isles, Orkney and Shetland should be allowed to compete in the third round of Contracts for Difference auctions.
- In June 2018 a rule change reclassified remote island onshore wind – with its high load factors and reliance on interconnector technology – as a “less established” technology, meaning developers can compete in spring's auction.
- UK Government [announced timing and frequency of future CfD auction rounds](#) for less-established technologies, including offshore wind, as called for by Scottish Renewables.
- [Led a coalition of ten trade bodies](#) in meeting Claire Perry MP, Minister for Energy and Clean Growth, raising concern over the delay to the Feed-in Tariff consultation and emphasising the value of supporting small-scale renewable generation.
- Continued to make the case to BEIS for a revenue mechanism to support pre-commercial technologies like tidal, wave and floating offshore wind to commercialisation.
- Called for a transition period for small-scale generators following the likely closure of the Feed-in Tariff including spend of budget, continued export tariff and a route to market mechanism in the BEIS FiT consultations.

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

- Called for the installation of high-carbon fossil fuel heating to be phased out from 2025, continued incentives for retrofit installations in off gas grid buildings and highlighted the significant scope for use of small rural heat networks in our response to BEIS' consultation on future support for renewable heat.
- Pressed the Scottish Government on future plans for the Scottish National Investment Bank, calling for the new body to "to lower the costs of capital to newer and more innovative industries by reducing risk". Our representations led to assurances from the First Minister that "One of the motivations behind establishing a bank is in filling gaps and being able to create markets or make more extensive the markets for some emerging sectors. Renewable energy is clearly one of those areas".
- Worked throughout 2017 to highlight the disproportionate business rates increases faced by many renewable energy sectors, but particularly hydropower. As a result of that work the Scottish Plant and Machinery Review is now set to take place in 2019, while Scottish Renewables continues to influence business rates as a member of the Scottish Ratepayers Forum.

**WORKED TO MITIGATE AND RESOLVE
BUSINESS RATES ISSUES FOR
RENEWABLE GENERATORS, SECURING A
REVIEW FOR 2019**

PLANNING & CONSENTS

- Called for to the Scottish Government's consultation on Fees Charged for Applications under the Electricity Act 1989, in which we called for a transparent process that ties increases in fees to service improvements, as well as highlighting the costs and risks for applicants. This has resulted in smaller fee increases being announced in 2019.
- Participated in the Multi-Use in European Seas project, as described in this blog, and contributed to a draft Action Plan which seeks to find solutions to reduce conflict and improve collaboration among users of the sea.
- Amendments to reform appeal rights fell at Stage 2 of the Planning (Scotland) Bill scrutiny in the Scottish Parliament, thanks in part to representations made by Scottish Renewables and other interest groups.

ONSHORE RENEWABLES

- Called for a supportive planning policy framework for repowering and life extension in new SNH guidance on impact assessment.
- Contributed to the Good Practice During Windfarm Construction guidance review in collaboration with SNH, SEPA, Forestry Commission, Historic Environment Scotland and Marine Scotland Science.
- Called for the Heads of Planning Scotland's updated position statement on financial guarantees (decommissioning bonds) to be fair, proportionate and consistent with the potential for repowering.
- Responded to BEIS' Capacity Market and Emissions Performance Standard Review, in which we made the case that pumped storage hydro, solar and wind should be able to participate in the scheme.

- Joined other industry bodies in signing a letter calling for the removal of the EU's solar trade measures, consisting of the minimum import price (MIP), anti-dumping and anti-subsidy duties on cells and modules from China, Taiwan and Malaysia. The letter gained widespread support and the European Commission has since acted to ends MIPs.

OFFSHORE RENEWABLES

- Called for more areas of shallow water to be included in Marine Scotland's draft Sectoral Marine Plan for Offshore Wind to allow further development of fixed-bottom technologies.
- Sat on the advisory steering group advising an Offshore Renewable Energy Catapult research report into the potential macroeconomic benefits of floating offshore wind. It points to a clear industrial future for the technology in Scotland.
- SR became a founding member of the new, pan-trade body UK Marine Energy Council, which has been convened to coordinate activities and messaging across industry with UK Government and Parliament and to secure vital routes to market for marine energy.
- Member of Scottish ministerial industry liaison working group on marine energy, where we continue to advocate for sector priorities.

LOW-CARBON HEAT

- In May, the Scottish Government launched a route map for its 20-year programme to decarbonise heat and tackle fuel poverty, Energy Efficient Scotland. Scottish Renewables responded, criticising the lack of policy on heat, with our comments picked up by MSPs during a Parliamentary debate.

PRESSED THE SCOTTISH GOVERNMENT ON FUTURE PLANS FOR THE SCOTTISH NATIONAL INVESTMENT BANK, CALLING FOR THE NEW BODY TO "TO LOWER THE COSTS OF CAPITAL TO NEWER AND MORE INNOVATIVE INDUSTRIES BY REDUCING RISK"



Hannah Smith
Senior Policy Manager

The likely end of the Feed-in Tariff in 2019 meant we worked extremely hard to secure positive outcomes for our members in this area last year.

The highlight for me was our leadership position on driving an industry consensus on the issues surrounding the FIT, coordinating a letter from 10 industry bodies to the UK Government and, after further work, secured a meeting with Energy Minister Claire Perry where we were able to set out the case for FiT-scale technology beyond just electricity generation.

Our work to secure a future for small-scale technologies will, of course, continue in 2019.

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

- Called for more action and supportive policy from the Scottish Government on district heat regulation, the cost of gas, business rates and incentive schemes in [our response](#) to the Local Heat and Energy Efficiency Strategies and Regulation of District Heating consultation.

GRID, SYSTEMS AND STORAGE

- Ofgem and National Grid's work on charging was, and continues to be, a key focus for Scottish Renewables in 2017-18. We've worked closely with the Charging Futures programme, reviewing reports and informing members of outputs, as well as developing a paper setting out the renewables industry's key concerns from this ongoing package of policy development.
- We [responded](#) to a wider Ofgem consultation on reforming network access and forward-looking charging arrangements, asking that both consider the impact of changes on the whole system.
- Collaborated closely with the Energy Networks Association on its work to reform management of DNO queues and the treatment of flexibility, arguing for transparency, fairness and future-proofing of changes to the connection queue process as well as the separation of DNO and DSO roles, fundamental drivers of network flexibility and the development of local flexibility markets. We also cautioned against advancing storage/flexibility ahead of other distributed energy resources in a connection queue.

OUR RENEWABLES
IN NUMBERS PAGE
WAS VIEWED ALMOST
14,000
TIMES IN 12 MONTHS

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 renewable energy in Scotland.

Scottish Renewables' 2017-18 publications were brighter and bolder than ever before, setting out the industry's position and acting as key anchors for our work with politicians, civil servants and the media.

We refreshed our [Industrial Impacts paper](#), setting out once again the real-life economic benefits of investing in the transition to a cleaner energy system. The document has now been downloaded from the Scottish Renewables website more than 1,000 times.

We constantly update the [Renewables in Numbers](#) page on the Scottish Renewables website based on official government figures in order to provide a credible, referenced source for both our work and that of interested stakeholders. The page was viewed almost 14,000 times in the 12 months to October 2018, and is referenced by 179 separate websites across the internet.



Stephanie Conesa
Policy Manager

Marine Scotland's draft Sectoral Marine Plan sets out a future for offshore renewables in Scottish waters, but one which has only limited space for fixed-bottom development.

A key piece of Scottish Renewables work in 2017-18 has been bringing together Marine Scotland and stakeholders from across our membership to proactively set out a more holistic future for Scotland's seas, which contain some of the best renewable energy resources in Europe.

REPRESENTING OUR MEMBERS

Scottish Renewables represents its members on Government and industry groups including:

First Minister's Energy Advisory Board
(Scottish Government)

Co-Chair of Renewables Industry Advisory Group
(Scottish Government)

Chief Planner's Infrastructure Delivery Group
(Scottish Government)

Scottish Assessors Non-Domestic Ratepayers Forum

Renewable Heat Industry Advisory Group
(BEIS)

Bioenergy Task Force
(Scottish Government)

Marine Energy Industry Group
(Scottish Government)

Offshore Wind Industry Group
(Scottish Government)

Sectoral Marine Plan for Offshore Wind Project Steering Groups
(Marine Scotland)

Charging Futures Forum
(Ofgem)

Open Networks Project Advisory Group
(Energy Networks Association)

Distributed Energy Resources Steering Group
(Energy Networks Association)

Hydropower Task and Finish Group
(Scottish Government)

Scottish Wind Farm Bird Steering Group
(Scottish Natural Heritage)

Community Benefits and Shared Ownership Steering Group
(Scottish Government)

TELLING OUR STORY

With diverse audiences come diverse challenges. Scottish Renewables works across sectors to promote and inform.

CAMPAIGNING

- Onshore Wind Week, organised in collaboration with members and RenewableUK, delivering a coordinated, industry-wide campaign which made the case for onshore wind and large-scale solar's access to the Contracts for Difference mechanism. That work included co-ordinating with 19 companies to tell onshore wind's story in a new document, Onshore Wind: Investing in Scotland's Energy Future, an innovative publication featuring interviews with the people behind wind energy.
- Scottish Renewables' onshore wind campaign also saw us create a new website, www.onshorewindscotland.com, conduct telephone polling which showed two thirds of rural Scots support the technology's deployment, and purchase the entire back page of the Scottish Conservative Party Conference programme for a pro-onshore wind advert.
- A Scottish Parliament photocall, organised by SR, was attended by 21 MSPs including Paul Wheelhouse MSP, Patrick Harvie MSP and Alexander Burnett MSP, as well as staff from businesses with an interest in onshore wind, including apprentices.

**MORE THAN 615
MENTIONS OF SCOTTISH
RENEWABLES ONLINE,
IN NEWSPAPERS, AND ON TV
AND RADIO**

ANNUAL REVIEW 2018

MEDIA

- Worked with journalists to provide accurate, referenced data and comment in response to 145 media enquiries
- Maintained Scottish Renewables' high profile through regular contributions to media outlets including interviews for Business Matters and WalkHighlands (print/online), and ITV News, BBC Reporting Scotland and Good Morning Scotland (broadcast).
- Issued more than 60 press releases and proactive statements to local, national, international and trade media on a range of topics including rural attitudes to renewable energy technologies, Government cuts and industry milestones.
- Our work led to more than 615 mentions of Scottish Renewables online, in newspapers, and on TV and radio.
- Continued to engage with media by meeting and briefing journalists writing for the Financial Times, The National, Carbon Brief, Sunday Herald, The Sun, BBC, ITV, The Guardian and the Daily Mail.
- Engaged with members, politicians, journalists and stakeholders on social media: grew Scottish Renewables' Twitter following by 12% and LinkedIn following by 44% in 12 months to nearly 16,200 and 3,900 respectively.
- Co-ordinated media coverage for member companies and provided communications advice around announcements and on securing coverage from journalists.
- Redesigned Scottish Renewables' marketing output, increasing engagement.



ISSUED MORE THAN
60 PRESS
RELEASES

DIGITAL

- Created [multiple promotional videos](#) and launched a brand new [Public Affairs Podcast series](#).
- Continued to develop Scottish Renewables' [blogs](#), attracting more than 5,600 views in 12 months on topics as diverse as [renewables in our national parks](#), the [Beast from the East](#) and [our 2018 intern's view of the industry](#) — part of our work to support the Scottish Government's Year of Young People.
- Used blogs as a means to brief members and stakeholders on topical issues affecting the renewable energy sector. Our [two-part](#) blog on National Grid's System Needs and Products Strategy looked at every relevant angle, providing an accessible way into a complex subject. It's been viewed almost 200 times.
- The introduction of the Lobbying (Scotland) Act in 2018 affected many of Scottish Renewables' members and was the subject of both an [explanatory blog/briefing](#) and a [member event](#) at the start of 2018. The former has now been read 400 times, while the latter was attended by representatives from 20 organisations.

SCOTTISH RENEWABLES'
BLOGS ATTRACTED MORE THAN
5,600 VIEWS IN
12 MONTHS



Nick Sharpe

Director of Communications

Our increased political engagement, particularly against a backdrop of Brexit, has been a highlight of 2017-18 for me.

At a time when public sentiment has changed the way the media see renewable energy, finding innovative ways of communicating compelling messages to decisionmakers directly is key to securing the future of our industry for members.

- Drafted conventional briefings on a range of topics including the [Contracts for Difference mechanism](#), an [action plan on policies to support the roll out of low-carbon heat in off-gas grid areas](#), the strategic importance of repowering onshore wind farms and the policies required to achieve success (in collaboration with RenewableUK and Energy UK) and on the Energy Networks Association's Future Worlds consultation document.

IN THE PARLIAMENTS

Scottish Renewables uses its profile and communications channels, as well as our wider network, to continually promote the benefits of our sector at Holyrood and Westminster, positioning renewable energy as the cornerstone of a low-carbon, clean-growth economy.

- We've been instrumental in creating an evidence base upon which Conservative Party politicians were able to speak about the party's shifting relationship with onshore wind, with Scottish Conservative Leader Ruth Davidson saying: "We have always been clear that the views of local communities should be heard when it comes to onshore wind. But where that consent exists, we are behind it 100%".
- Held a UK Parliament reception addressed by Alan Brown MP and attended by a record number of Scottish MPs and Lords, and a Scottish Parliament Reception addressed by Maurice Golden MSP and attended by other MSPs and stakeholders, as well as a reception to mark Offshore Wind Week addressed by Graeme Dey MSP.
- In regular contact with MSPs, MPs, UK and Scottish Government Ministers and Special Advisers including the Secretary of State for Business, Energy and Industrial Strategy, the Secretary of State for Scotland,

the First Minister's Special Adviser, and the Scottish Conservative Westminster Parliamentary Group.

- First Minister of Scotland, Nicola Sturgeon MSP, addressed Scottish Renewables Annual Conference, and Minister for Energy, Connectivity and the Islands Paul Wheelhouse MSP spoke at several Scottish Renewables conferences throughout the year, with Humza Yousuf MSP, then Minister for Transport, addressing our Low-Carbon Cities Conference.
- Worked with Liam McArthur MSP to secure a Members' Business Debate, titled The Marine Energy Industry's Potential to Grow, in the Scottish Parliament. Cross-party contributions celebrated the successes of wave and tidal technologies and discussed Scotland's vast marine potential, with Mr MacArthur saying "I believe that wave and tidal energy will have an important role to play in that future energy mix", and Scottish Conservative energy spokesman Alexander Burnett MSP asserting "As we all know, renewable energy is the future".
- 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 Scottish Renewables within the Scottish Parliament. Survey results showed SR continues to be one of the most well-known and respected membership organisations.
- Held a standing-room-only event on heat policy, titled Too Hot to Handle?, at the SNP Conference, and a roundtable with opposition energy spokespeople at Holyrood which fed directly into evidence given by SR to the Scottish Parliament's Environment, Climate Change and Land Reform Committee

**SCOTTISH RENEWABLES
CONTINUES TO BE ONE OF THE MOST
WELL-KNOWN AND RESPECTED
MEMBERSHIP ORGANISATIONS**

FIRST MINISTER OF SCOTLAND, NICOLA STURGEON MSP, ADDRESSED SCOTTISH RENEWABLES ANNUAL CONFERENCE

- Gave oral evidence to the Scottish Parliament's Economy, Jobs and Fair Work Committee on the Scottish Government's plans for a publicly owned energy company and the place of the renewables sector in Scotland's economy, to the Local Government Committee on the Planning (Scotland) Bill, and the Environment, Climate Change and Land Reform Committee on the Crown Estate (Scotland) Bill.
- Submitted written evidence to the Local Government committee at Stages 1 and 3 of the Planning (Scotland) Bill; the Economy, Jobs and Fair Work Committee on the Scottish Government's plans for a publicly owned energy company; the Environment, Climate Change and Land Reform Committee on the Crown Estate (Scotland) Bill and the Climate Change (Emissions Reductions Targets) Bill, as well as the Scottish Government regarding the proposed South of Scotland Enterprise Agency.
- Attended both the SNP and Scottish Conservative Party Conferences, as well as the UK Conservative Party Conference.
- Issued briefings to MSPs ahead of Scottish Parliament debates on topics including the Energy Efficient Scotland Route Map and community benefits payments from renewable energy projects.
- Acted as an observer in the early stages of the Just Transition partnership.



Peter Speirs
Public Affairs Manager

Making our industry's voice heard with politicians and decision-makers is at the centre of everything Scottish Renewables does.

Effectively influencing and working with figures from across the political spectrum is the only way to make renewable energy a priority at Holyrood and Westminster.

As a relatively new part of the economy it is doubly important for the renewables sector to engage with those whose policies and decisions impact every aspect of our members' businesses.

ENGAGING, PROMOTING AND DEVELOPING

We're made of our members, and we work with their interests at our core. Our industry-leading events programme and strategic partnering provides members with opportunities to network, share information and create stronger professional networks to grow their businesses while learning from colleagues across the industry.

We've always tried to ensure the widest possible representation at all our events, and 2017-18 saw a redoubling of those efforts. Between April and October 2018 a third of the speakers at Scottish Renewables events were female. We know we can do better, and will continue to work to increase engagement across the board in 2018-19.

CONFERENCES, DINNERS AND AWARDS CEREMONIES

Floating Offshore Wind UK (co-organised with RenewableUK), 14 November 2017, Glasgow

The Scottish Green Energy Awards, 30 November 2017, Edinburgh

Offshore Wind Conference, Exhibition & Dinner, 29-30 January 2018, Glasgow

Low-Carbon Cities Conference, 20 February 2018, Edinburgh

Annual Conference, 26-27 March 2018, Edinburgh

Low-Carbon Heat Conference, 24 April 2018, Glasgow

Hydro Conference & Exhibition, 08 May 2018, Perth

Young Professionals Green Energy Awards,
24 May 2018, Glasgow

Onshore Wind Conference,
12 June 2018, Glasgow

Storage & Systems Conference,
13 June 2018, Glasgow

Solar Conference,
04 September 2018, Edinburgh

Marine Conference,
26 September 2018, Edinburgh



Lisa Russell
Events Manager

Scottish Renewables' events programme has continued to buck industry trends, with packed programmes, topical subject matter and innovative networking opportunities ensuring delegates continue to attend.

Our events are one of the ways in which we give industry a voice, as well as bringing together colleagues and like-minded individuals from organisations with shared goals to foster business opportunities, shape our policy positions and drive revenue.

MEMBER EVENTS

Members' Forum & Reception, 12 December 2017 Glasgow

Members' Network Event: Introduction to the Lobbying Act,
14 February 2018, Glasgow

Members' Forum & AGM, 15 May 2018, Glasgow

Modern Slavery - How Should the Energy Sector Respond?
14 May 2018, Glasgow

Westminster Reception, 25 October 2017, London

Scottish Parliamentary Reception,
16 January 2018, Edinburgh

SEMINARS

Refinancing, 21 November 2017, Glasgow

Onshore Wind: Optimisation, Life Extension & Storage,
26 April 2018, Glasgow

Socio-Economic Benefits in Planning,
30 August 2018, Glasgow

EXTERNAL EVENTS

Exhibited at Floating Offshore Wind Conference
14 November, Glasgow

Exhibited at RUK Asset Management Conference
15 November, 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.



MEMBER SURVEY 2018

In 2018 we held a Member Survey to better understand members' needs and streamline future work programmes. More than 120 employees of member organisations responded.

- When asked 'how well do you feel Scottish Renewables represents your organisation's interests?', 79% of people rated us between seven and 10 out of 10, with 9% answering 10 (extremely well).
- Respondents were asked to choose three words to describe Scottish Renewables. The most popular words chosen (in order) were approachable, informative, professional, dynamic and influential.
- Respondents told us that the services most important to them (in order) were receiving email updates on industry developments; our Daily Briefing news email; our representation of industry to the media and our programme of free member events.
- We also asked members how they thought their own businesses would perform in the coming 12 months. Only 4% said they thought the number of employees in their organisation would shrink, with 44% predicting an increase in numbers. Similarly, 42% said they expected the turnover of their UK business to increase, with only 5% predicting it would shrink.
- An overwhelming majority of respondents said UK Government policies/regulation were the biggest challenge facing their business over the past 12 months.

We've made some changes in response to the Member Survey's results, including increasing our engagement at Westminster and with members more generally — and are continuing to use its outcomes to guide our policy work.



scottish
renewables