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Onshore wind and net-zero: the sector's second golden age

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Claire Mack

Chief Executive

Scottish Renewables

Derek Hastings

Head of Onshore Projects

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Director

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Professor Keith Bell

Member

Committee on Climate Change

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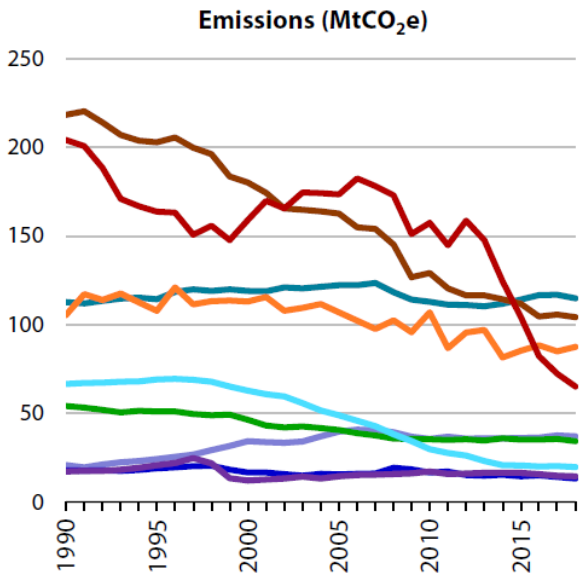
Committee on Climate Change

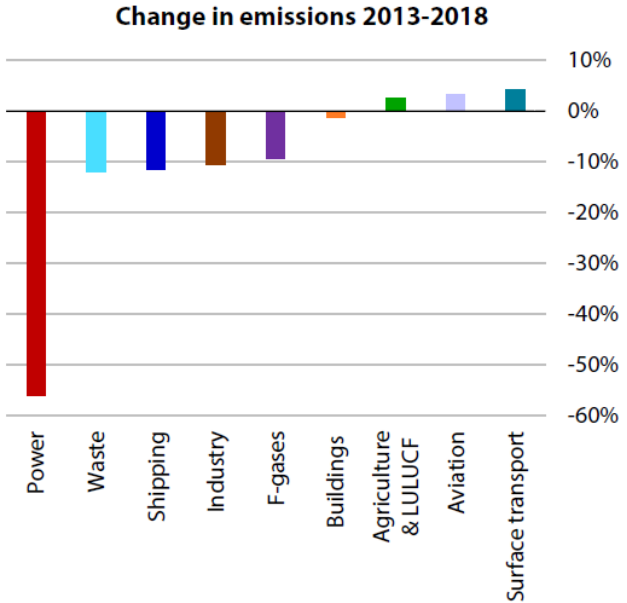
Scottish Renewables Onshore Wind Conference
August 5th 2020

Onshore wind's role in delivering net zero

Keith Bell

The electricity sector has led the way in emissions reduction…

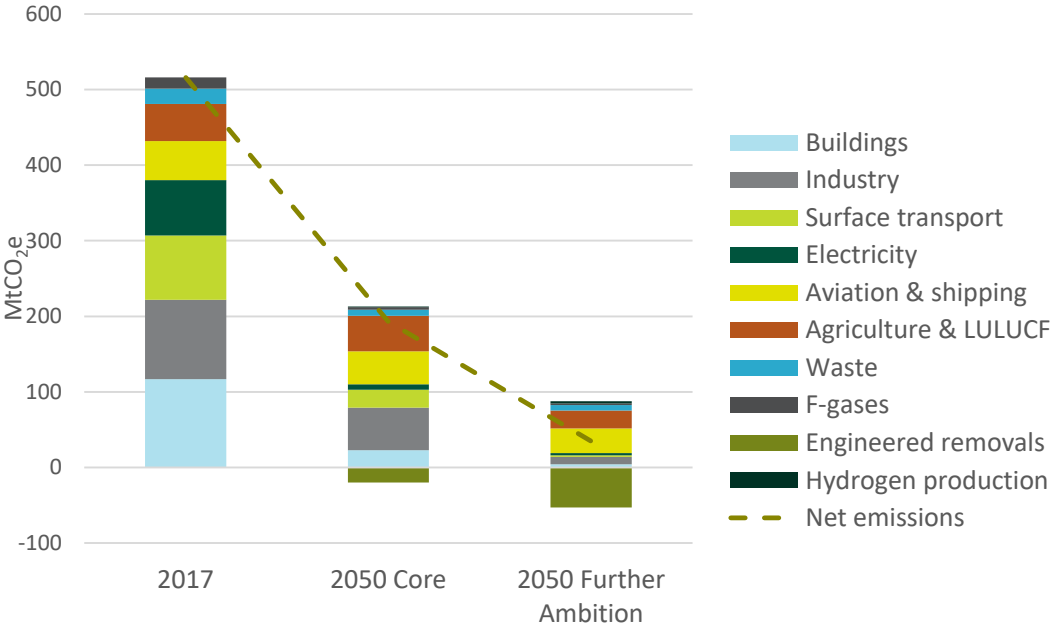


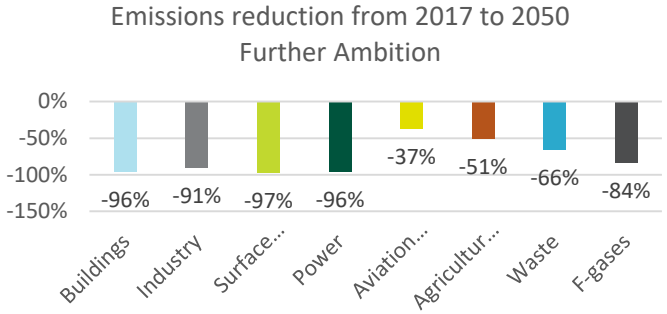


Source: BEIS (2019) *2018 UK Greenhouse Gas Emissions, Provisional Figures*; BEIS (2019) *2017 UK Greenhouse Gas Emissions, Final Figures*; CCC calculations.
Notes: The chart on the right-hand side shows changes in sectoral emissions between 2013 and 2018 for all sectors except for Agriculture, LULUCF, Waste and F-Gases which cover the period 2013-2017; buildings emissions in this chart are temperature-adjusted.

Source: CCC (2019) Progress Report to Parliament

… but more needs to be done





- By 2025, a full net-zero policy package must be in place and working effectively. Most areas will have scaled up delivery and the transition must be well underway
- By 2030-35, almost all new investments (e.g. all new cars and heating systems) should be zero-carbon.
- From 2035 to 2050, emissions will continue to reduce rapidly as investments flow through the economy, but the rate and type of investment will not need to change as much as in earlier years.

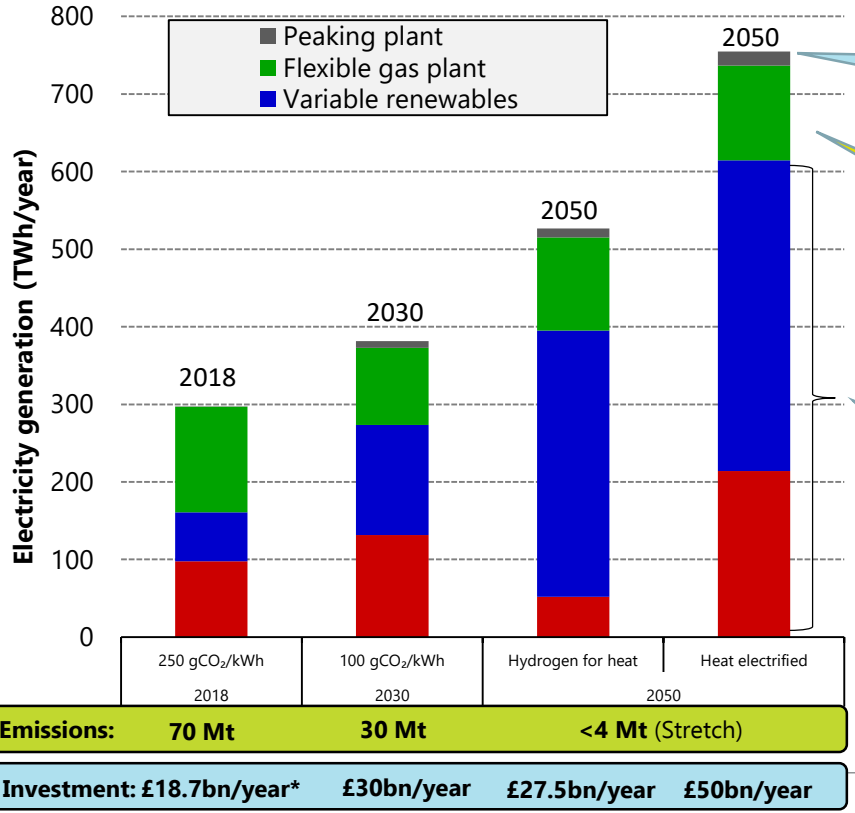
Data: CCC net-zero report, 2019

The growing need for different types of generation capacity

Scale up production from variable renewables

Fill in the gaps around availability of power from variable renewables

- Flexible demand
- Flexible, 'schedulable' generation
- Interconnectors

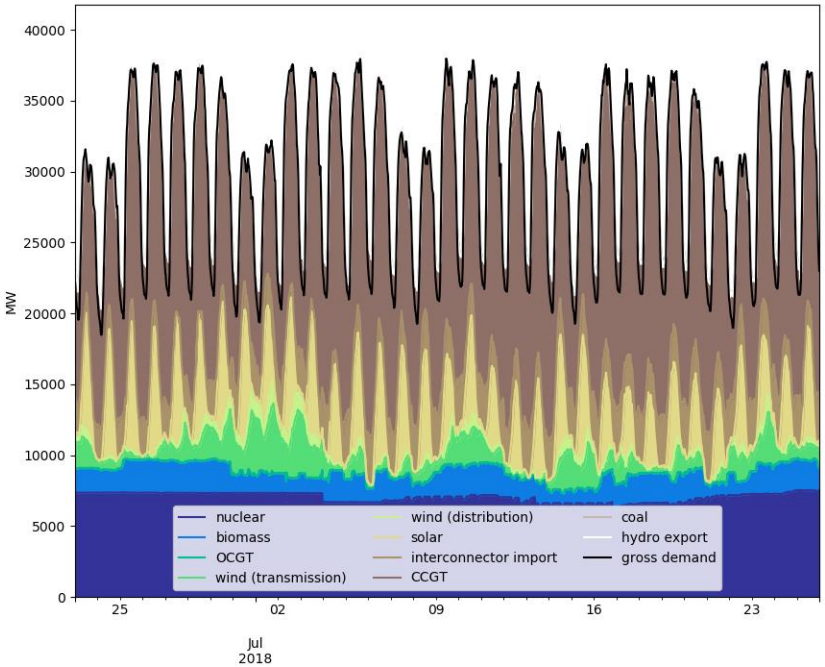


Meeting peak demand will mean **investing in large volumes of peak generation capacity**, particularly for heat, with low utilisation. This will also need to be decarbonised.

Maintaining flexible gas plant on the system to help balance variable renewable generation. Requires building 20-40 GW of CCS to decarbonise.

Meeting new demands with low-carbon generation will involve **building 1-2 GW of firm capacity and 5-8 GW of variable renewables per year**. This can provide around 85% of total electricity generation between 2030 and 2050

Wind ‘drought’ for extended periods



Start Date	23rd June 2018	
Duration	33 days	
Peak gross demand	38.0 GW	
Average gross demand	29.5 GW	
Total gross demand	23,445 GWh	
Total wind output	1,448 GWh	**2018 Mean**
Average wind CF	8.4%	28.1%
Average wind output	1.8 GW	6.0 GW
Demand met by gas-powered generation	46.1%	37.9%

(The wind index for 2018 equals 99% of the long term average)

What kinds of resources can fill the gap left by wind and help to meet demand for electrical energy and the peak of demand during a ‘wind drought’?

Committee on Climate Change

System challenges from more weather-dependent renewables

- Reduced system inertia and short circuit current
  - New faster frequency containment reserve
  - A market for short circuit current capability?
- Closure of plant providing frequency, voltage and black start services
  - New value for storage and enhanced reactive power capability
- Network constraints
  - 'Flexibility' gets you only so far
- Uncertain interactions between power electronic converters
  - New sets of Grid Code requirements and enforcement responsibilities
- How much distributed generation is observable and controllable?

Figure B1.1. Generation from wind and nuclear; electricity demand (first three weeks, Jan 2018)

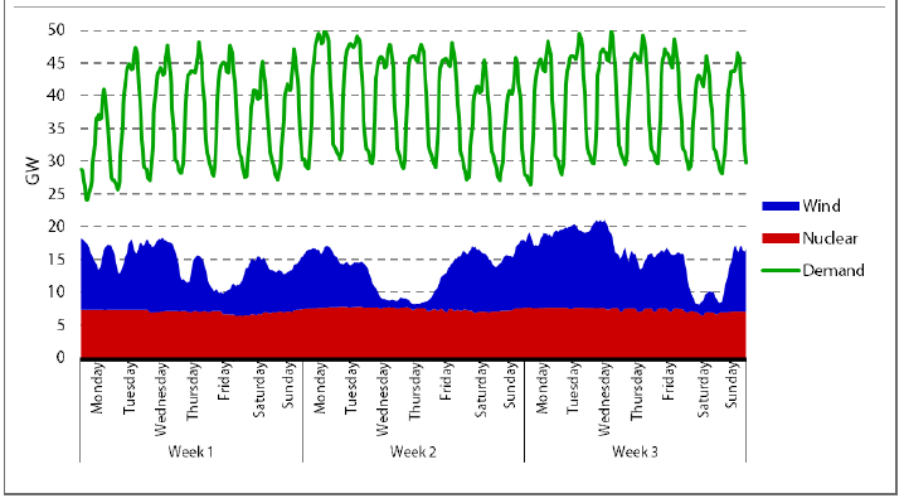


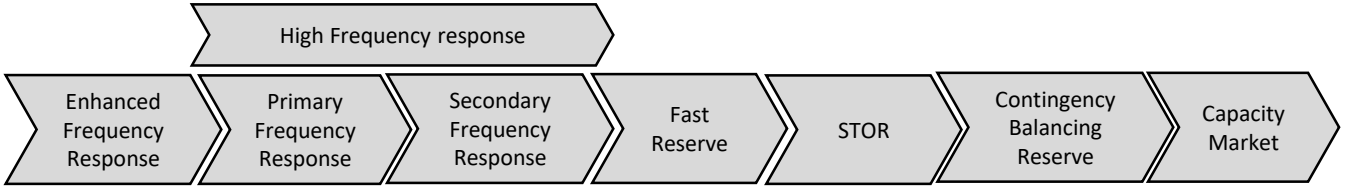
Figure: the CCC

Committee on Climate Change

The use of markets in the power system

- Aim of energy policy largely the same for 3 decades: "to ensure secure, diverse and sustainable supplies of energy in the form that people want, and at competitive prices". (1993 White Paper)
  - Preference to avoid centralised trading arrangements and single buyers, e.g. introduction of NETA in 2001.
  - Emphasis on competition. (How important is transparency?)
- Aside from the Balancing Mechanism and ancillary services, we currently have two centralised electricity markets: for CfDs for renewables; the Capacity Market
- Will the emergence of 'merchant' developments of wind or solar farms mean an end to a need for centralised CfD auctions?
- Will 'smart' meters plus smart Supplier actions succeed in revealing a market value for reliability of supply and end to the need for a capacity market?
- Or, do we need major new markets?

Getting the right kind of flexibility



- Wind can contribute to frequency response if it's windy
  - 'Power available' signal should help the ESO; what else can promote use of wind and solar?
- Can we rely on the decentralised energy markets to deliver capability to fill in the gaps as wind and solar output vary over a few hours?
- Will capacity bought in a capacity market be able to sustain output through wind droughts?
- What mix of 'schedulability', flexibility and 'persistence' of resources do we need?
  - Would a requirement to deliver 'firm power' actually help?

	Schedulable?	**Flexible?**	**Persistent?**
Wind	No	If it's windy, yes	Sometimes
Nuclear	Yes	No	Yes, for the most part
Batteries	Yes	Yes	To an extent, if power is rationed
Pumped hydro	Yes	Yes	Only if power is rationed

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Ministerial Address

Paul Wheelhouse MSP, Minister for Energy, Connectivity and the Islands, Scottish Government

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Social and political earthquakes: have current crises provided the new start onshore needed?

Ben Walker
Public Affairs Manager
Scottish Renewables

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Chris Yiu

Executive Director

Tony Blair Institute for Global Change

Hazel Gulliver

Director of Engagement

ScottishPower

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SCOTTISHPOWER

Scottish Renewables Onshore Wind Conference

Hazel Gulliver, Director of Engagement

ScottishPower: our business

We're the first integrated energy utility in the UK to generate 100% green energy. Our focus is on renewable generation, smart grids and customer solutions.

£6bn UK investment between 2018 - 2022

Over **2,000 MW** of wind capacity

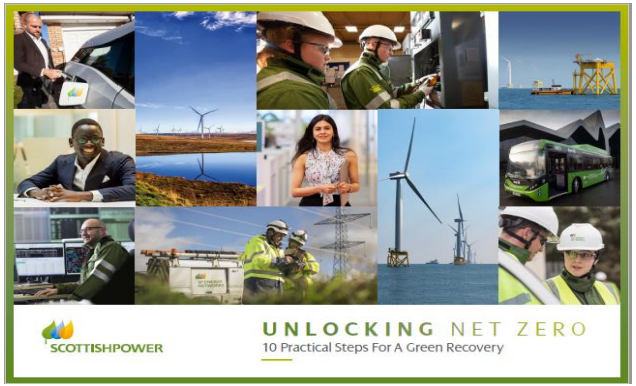
~5 million electricity and gas retail customers across UK

3.5 million Network supply points and over **110,000 km** of power lines

A team of over **5,600 people**

Unlocking Net Zero: 10 Practical Steps for a Green Recovery

- We have set out ten practical steps we can take together to secure a green recovery
- The steps look at the transition to renewable generation, electric vehicles and low carbon buildings
- By taking the right approach now, the UK can unlock significant economic benefits on the path to Net Zero, these steps will help by:
  - Incentivising private investment
  - Creating jobs
  - Boosting our domestic supply chain
  - Ensuring no communities are left behind
- Crucially, most of the steps we recommend can be taken without any additional cost to government.



All of the steps in our document are underpinned by an increased investment in the **onshore wind industry**

Green Generation

1	Build on success of existing CfD scheme with ambitious programme of uncapped future auctions	No additional funding required	• Creates jobs • Supports UK supply chain • Boosts investment in regions and local communities • Delivers low-cost, green energy • Drives technological innovation
2	Prioritise climate change mitigation and support the planning process to speed up the Net Zero transition		

Net Zero Networks

3	Ensure the right framework is in place to attract the investment in network infrastructure needed to meet Net Zero	No additional funding required	• Creates jobs • Supports UK supply chain • Boosts regional development • Stimulates low carbon innovation
4	Unlock additional investment through a more ambitious approach to the RIIO T2 and ED2 price controls		

Electric Vehicles

5	Bring forward the petrol and diesel vehicle phase-out date to 2030	No additional funding required	• Creates jobs • Sends clear signals to the UK supply chain • Drives EV adoption • Delivers fair access to low-cost EV charging for every community • Stimulates innovate and deployment of low carbon solutions
6	Maintain grant funding for EVs and home chargers	No additional funding required	
7	Support the roll-out of a comprehensive network of public EV charge points	Some additional funding required	

Low-Carbon Buildings

8	Speed up action on energy efficiency and bring forward the Future Homes Standard to 2022	Some additional funding required	• Creates jobs • Sends clear signals to the UK supply chain • Stimulates investment • Boosts regional development • Speeds up carbon reduction benefits, reduces energy demand • Improves family income and tackles fuel poverty
9	Increase grant funding for the roll-out of heat pumps and support heat pump-based heat networks	Some additional funding required	
10	A new approach on smart metering to accelerate roll-out	No additional funding required	

Onshore Wind: At the Core of a Green Recovery

- We all know it's the lowest cost new build electricity generation.
- Well-established regulatory and policy mechanisms mean no shortage of projects and opportunities where governments can deliver progress
- Investment in renewables projects through an ambitious CfD programme in the UK in 2021 will drive a green economic recovery
- Post-Covid, sustainable long-term jobs and economic benefits in the onshore wind sector will help keep the UK on track to deliver the volumes it needs for Net Zero.
- Investment at scale will drive the growth of UK renewables industry and encourage a robust supply chain

Support for key innovations like battery storage will also help balance generation and support the resilience of the energy system.

Onshore Wind: Challenges Remain

Planning:

- Onshore wind is receiving record levels of support but landscape and planning issues remain
- Planning process needs to keep up with new technology, taller turbines, colocation and hybrid projects to ensure most cost effective production of clean, green energy
- Major need for a clear steer through planning process – NPF4 crucial
- Covid impact on local authority resourcing = significant risk

Grid:

- RIIO T2 draft determination + discussions on early competition for network investment + ongoing discussions on grid charges = unprecedented levels of uncertainty

Aviation:

- The landscape has changed. We need to continue to encourage the airline industry to accept this so it does not get in the way of the development of decarbonisation technologies.

Brexit in a Covid Context

- Risks of No Deal Brexit are increasing
- Thorough preparations for No Deal extended to become measures to cope with Covid
- Anticipated similar impact on global and local supply chains
- Potential disruption at ports – need to ensure stock available
- Uncertainty in relation to tariffs and currency
- Global company, HQ in EU, international workforce

Even more important that regulatory and policy mechanisms for onshore wind are maximised for the benefit of local economy!

Jamie Maxton

Head of External Relations

SSE Renewables

SCOTTISH RENEWABLES ONSHORE WIND CONFERENCE

SOCIAL AND POLITICAL EARTHQUAKES: HAVE CURRENT CRISES PROVIDED THE NEW START ONSHORE NEEDED?

5 August 2020

"Scotland, as with other countries, faces enormous challenges, and we need to all work together as never before to ensure our country emerges through this pandemic with a green economic recovery that has inclusion and wellbeing at its heart."

Fiona Hyslop MSP II Cabinet Secretary for Economy, Fair Work & Culture

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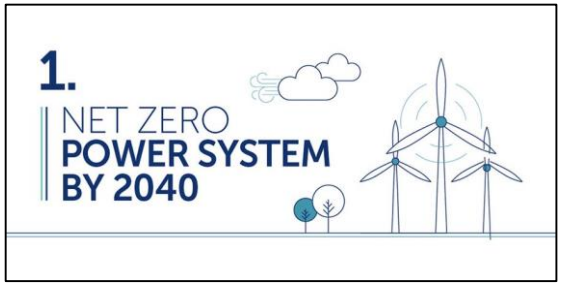
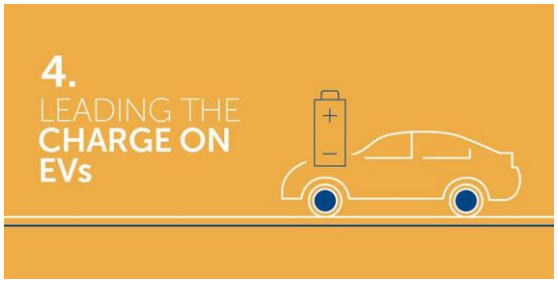
GREENPRINT FOR A CLEANER RESILIENT ECONOMY





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ONSHORE WIND & GREEN RECOVERY

A Strong Track Record of Delivering Economic Benefits

A Decade of Clean Growth

Contributing to GDP and jobs

Total
£6.1bn committed spend
(66% UK and Irish content)
£3.9bn added to GDP
67,000 years of employment

1 **UK economy**
£3.4bn committed spend
£3.3bn added to GDP
61,000 years of employment

2 **Scottish economy***
£2.8bn committed spend
£2.3bn added to GDP
43,000 years of employment

3 **Irish economy**
€830m committed spend
€600m added to GDP
6,000 years of employment

Generating Benefits in the Great Glen

GREAT GLEN BENEFITS

Lifetime	Development and construction		Operations	
Creating **£360M** of value	Created **£90M** of value	Supported **1,170 years** of employment	Creating **£11M** of value each year	Supporting **130 jobs** each year

HIGHLAND BENEFITS

Lifetime	Development and construction		Operations	
Creating **£480M** of value	Created **£140M** of value	Supported **1,860 years** of employment	Creating **£14M** of value each year	Supporting **170 jobs** each year

SCOTLAND BENEFITS

Lifetime	Development and construction		Operations	
Creating **£1.2BN** of value	Created **£460M** of value	Supported **6,450 years** of employment	Creating **£29M** of value each year	Supporting **380 jobs** each year

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DELIVERING IMMEDIATE BENEFITS

Viking & Gordonbush Extension

VIKING WIND FARM EXPECTED TIMELINE

- 443MW project with estimated load factor of 48%
- Largest onshore wind farm in the UK in output terms
- First export expected Q2 2024

GORDONBUSH EXTENSION

- 11 turbine development with an install capacity of 47MW
- Extension to the existing 70MW Gordonbush windfarm
- First export expected Q1 2021

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FROM OPPORTUNITY TO DELIVERY

Removing the Roadblocks

- CfD proposals an important step forward, but auction likely to be highly competitive
- Vital that delivering net zero carbon is at the heart of Scotland's planning system
- NPF4 is central to achieving this
- Delay to NPF4 is understandable in the circumstances, but we need action now to ensure development which helps meet climate change targets is prioritised

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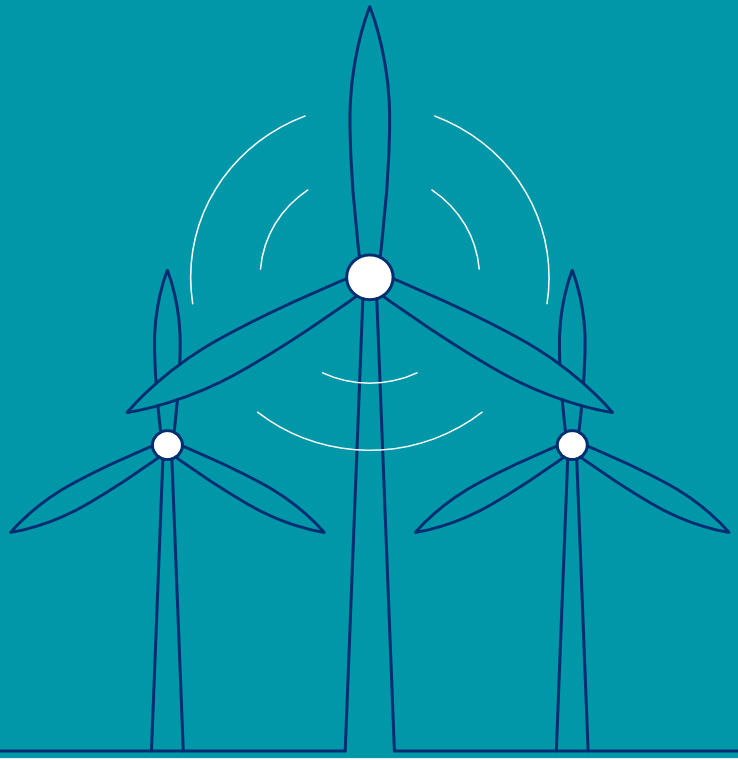
THANK YOU



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Stephen Lilley

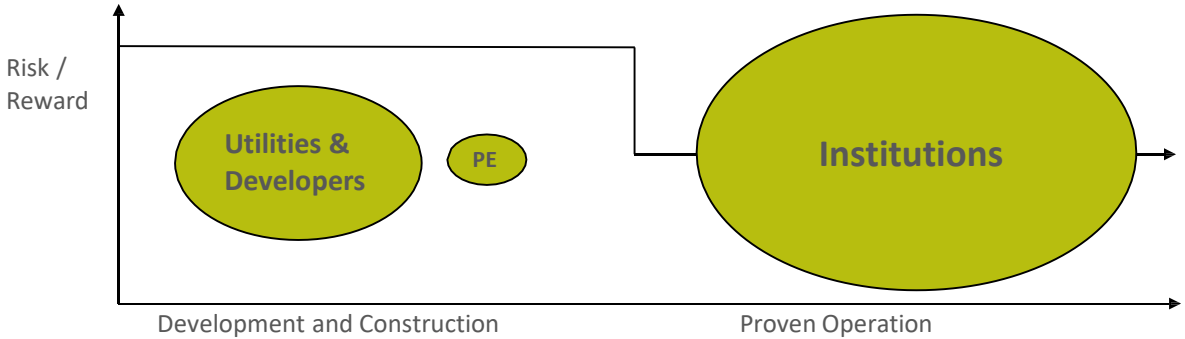
Partner

Greencoat Capital

GREENCOAT
UK WIND

The Future of Onshore Wind?

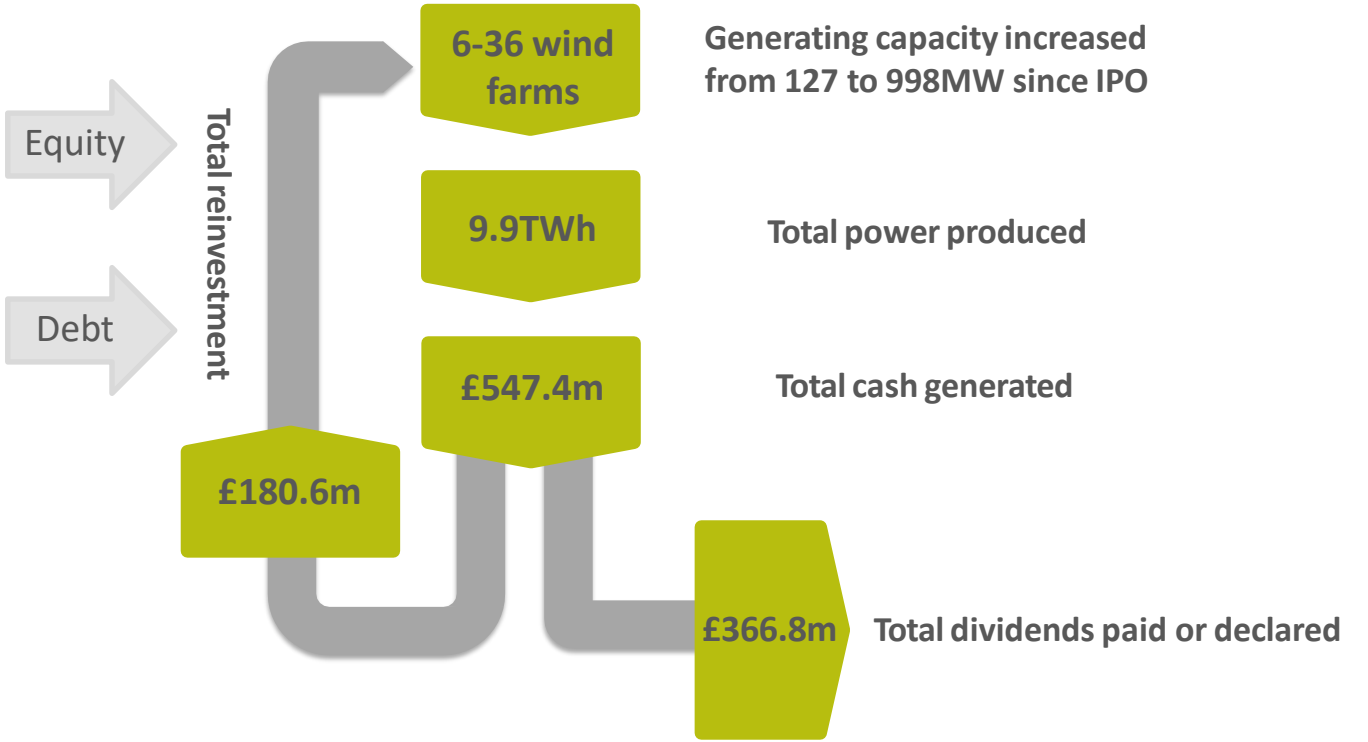
Matching long term assets with long term capital



- Institutional investors want to buy operational assets
- Low leverage, yield, expose to inflation and capital preservation important themes
- Liquidity, transparency and familiarity for investors
- Equity capital markets v alternative allocation of pension funds!

PULLING is easier than PUSHING capital through the system

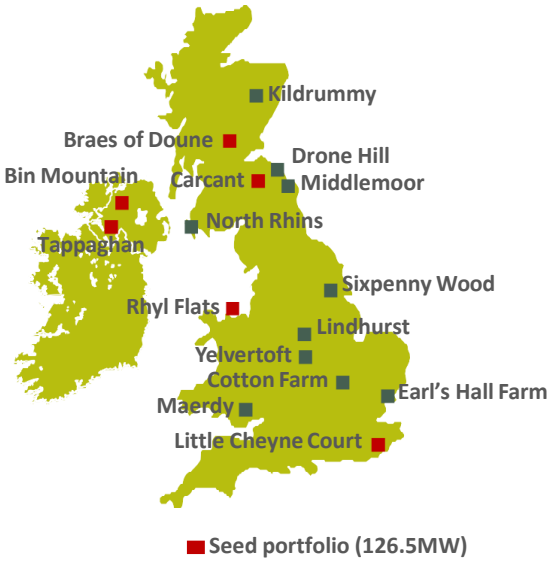
Simple, Low Risk, Proven Model

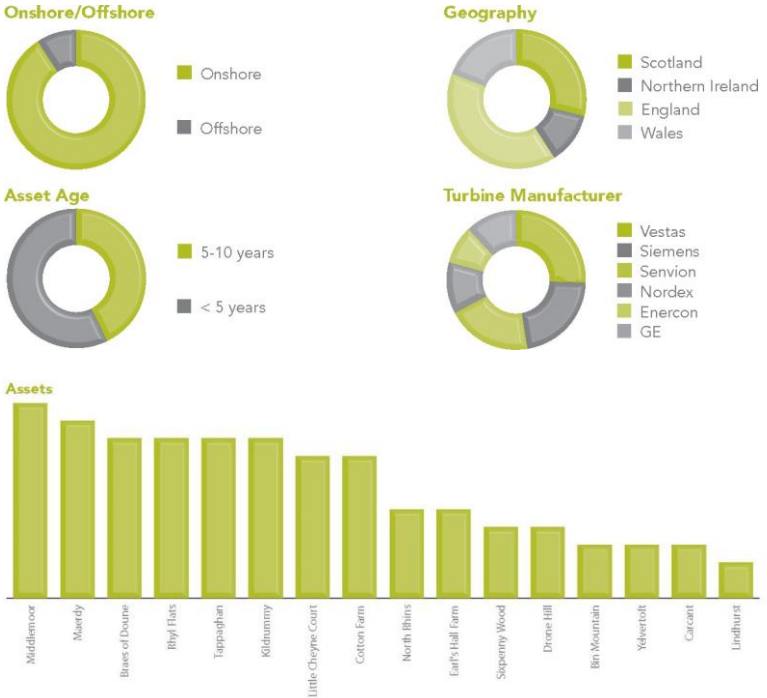


"6p dividend, increasing with RPI inflation and real NAV preservation"

Note: from listing to 30 June 2020

2015 Portfolio overview (271.5MW, GAV £591.2m)

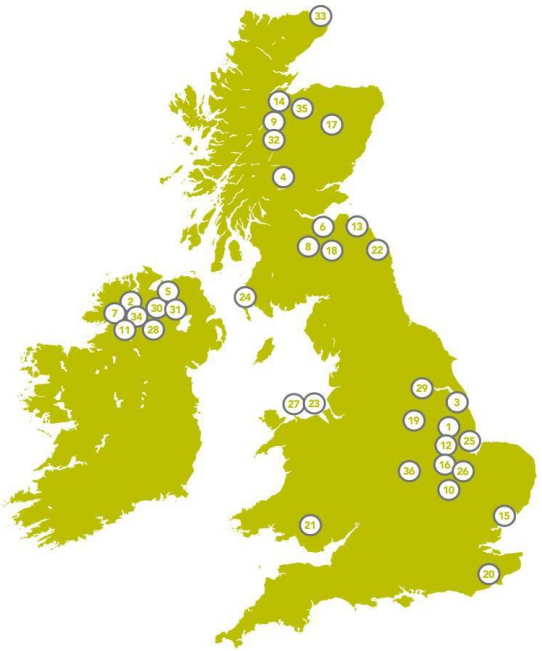


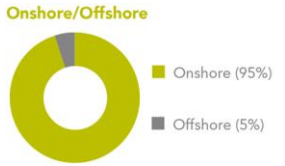


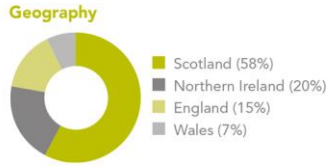
High quality, well-balanced portfolio of assets,
providing sufficient power for 220,000 homes (Edinburgh)

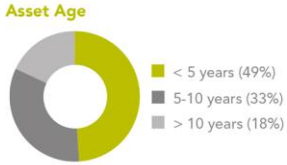
Note: All assets shown by value as at 31 December 2014

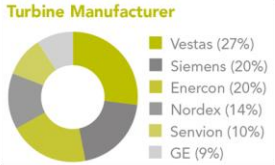
Current Portfolio Overview (998MW, GAV of £2.45bn)

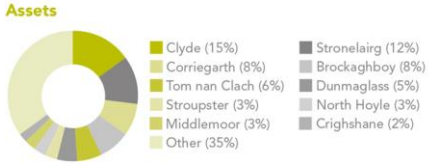






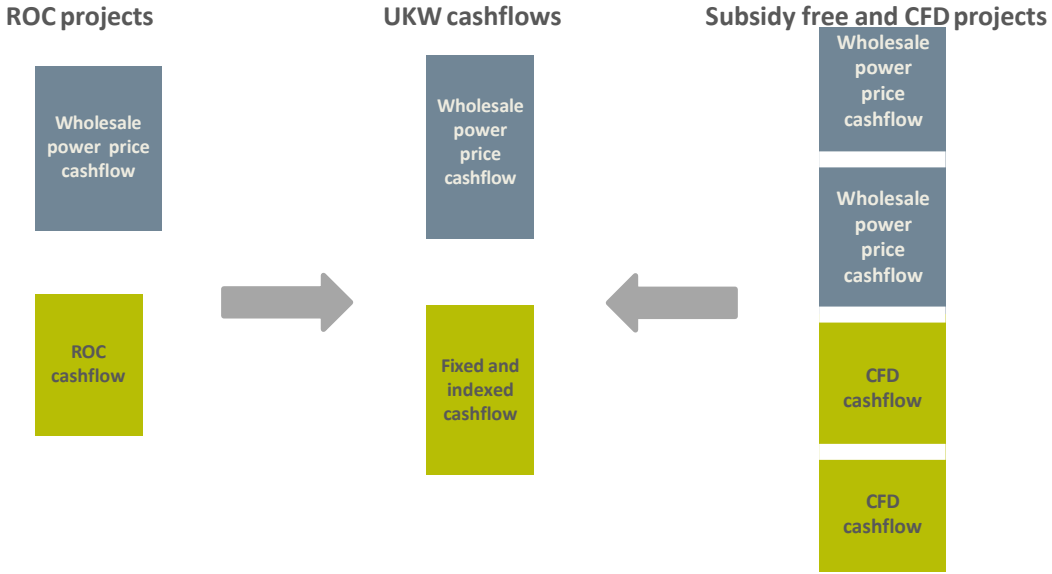






Generating sufficient electricity to power approximately 1 million homes – third largest owner of UK onshore wind

Strategy and Ongoing Market Development



- Given market size, UKW expects to continue to make a significant amount of ROC investments in the future
- There may be further opportunities to invest in complementary CFD and subsidy free projects alongside
- In appropriate proportions, CFD and subsidy free investments should deliver a similar cashflow to a ROC project

Balance between fixed and variable cashflows across the portfolio

CFD and Subsidy Free Investments

Tom nan Clach

- Acquired from Belltown Power
- 39.1MW (constrained) capacity
- COD May 2019
- PPA with Statkraft until 2034 (CFD at £92.80 (2019 real) increasing with CPI)

Douglas West

- Acquired from Blue Energy
- 45MW capacity
- July 2021 target operations commencement
- PPA - TBD

Glen Kyllachy

- To be acquired from Innogy
- 48.5MW capacity
- Oct 2021 target operations commencement
- PPA – TBD

Windy Rig

- To be acquired from Statkraft
- 43.2MW capacity
- Q2 2021 target operations commencement
- Statkraft route to market PPA

Twentyshilling

- To be acquired from Statkraft
- 37.8MW capacity
- Q3 2021 target operations commencement
- Statkraft route to market PPA

South Kyle

- To be acquired from Vattenfall
- 235MW capacity
- Q1 2023 target operations commencement
- Vattenfall route to market PPA

Lower risk/lower return and higher risk/higher return together

Will COVID-19 or Climate Concerns = Onshore Buildout?

Economy

- Power demand will increase
- Market volatility is here
- Demand for low risk yielding investment

Environment

- ESG becoming increasingly important with investors
- “Green recovery” is politically popular
- “Net zero” target for 2050 is challenging

Opportunity to achieve a number of goals/aims, but support will be required

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Freeing up finance

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Department for Business, Energy and Industrial Strategy

Rachel Anderson

Head of External Affairs

RES

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Gordon Mina

Head of Sales

Renewable Parts

Onshore Wind 2020: Freeing up finance

Renewable Parts Ltd

Waiting for CFD and life without it

- Deployment of onshore wind has fallen dramatically
  - Less volume of projects for supply chain to increase efficiency
  - Highly competitive auctions puts pressure on supply to optimise
- Costs (capital and operational), price of electricity, and yield
  - With or without CFDs, optimisation is critical but currently for most it's not enough
  - Refurbished WTGs offer an alternative
- Refurbished WTGs
  - What are the risks?
  - What are the benefits in addition to CapEx reduction?
- What's needed?
  - Recognition of optimisations in financial models.

Renewable Parts Ltd

Opportunities for Supply Chain

- Consultancies/Service providers
  - Grid code compliance of older WTGs
  - Optimisation from operational to new developments

- Repowering
  - How best can civils be re-used, or recycled onsite?
  - Reusing assets in-country benefits multiple layers.

- Circular economy
  - Refurbished components
  - Improvement of components (remanufacture)

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Planning in uncertain times

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Stephanie Conesa

Policy Manager

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Jennifer Ballantyne

Partner

Pinsent Masons LLP

Jennifer Ballantyne
Pinsent Masons

Scottish Renewables Onshore Wind Conference

6 August 2020

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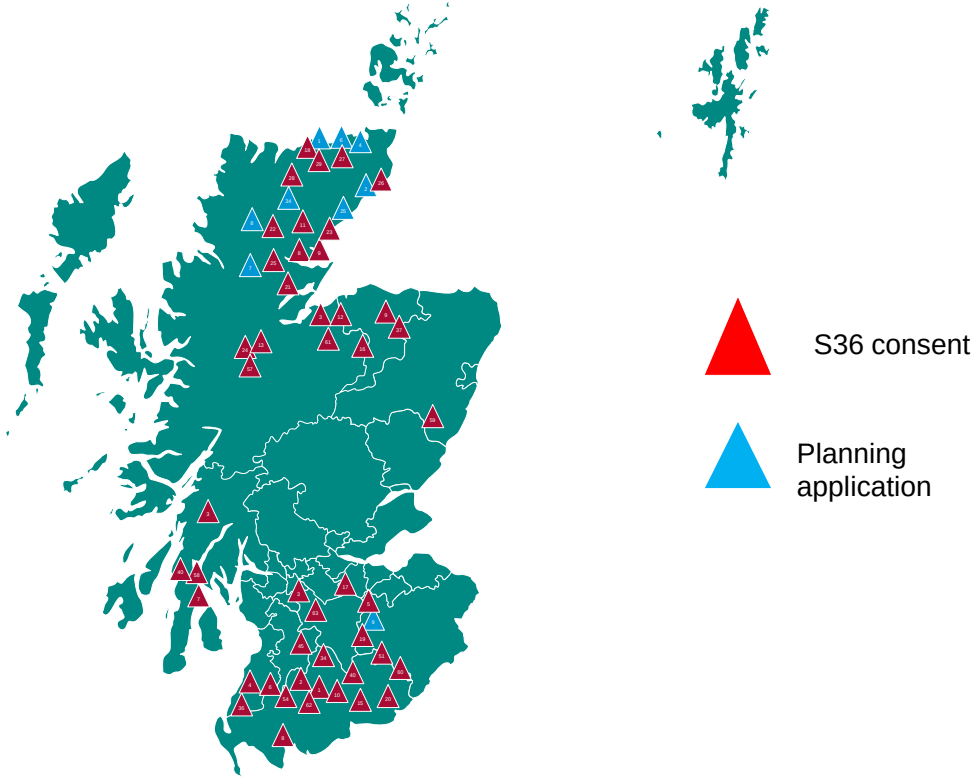
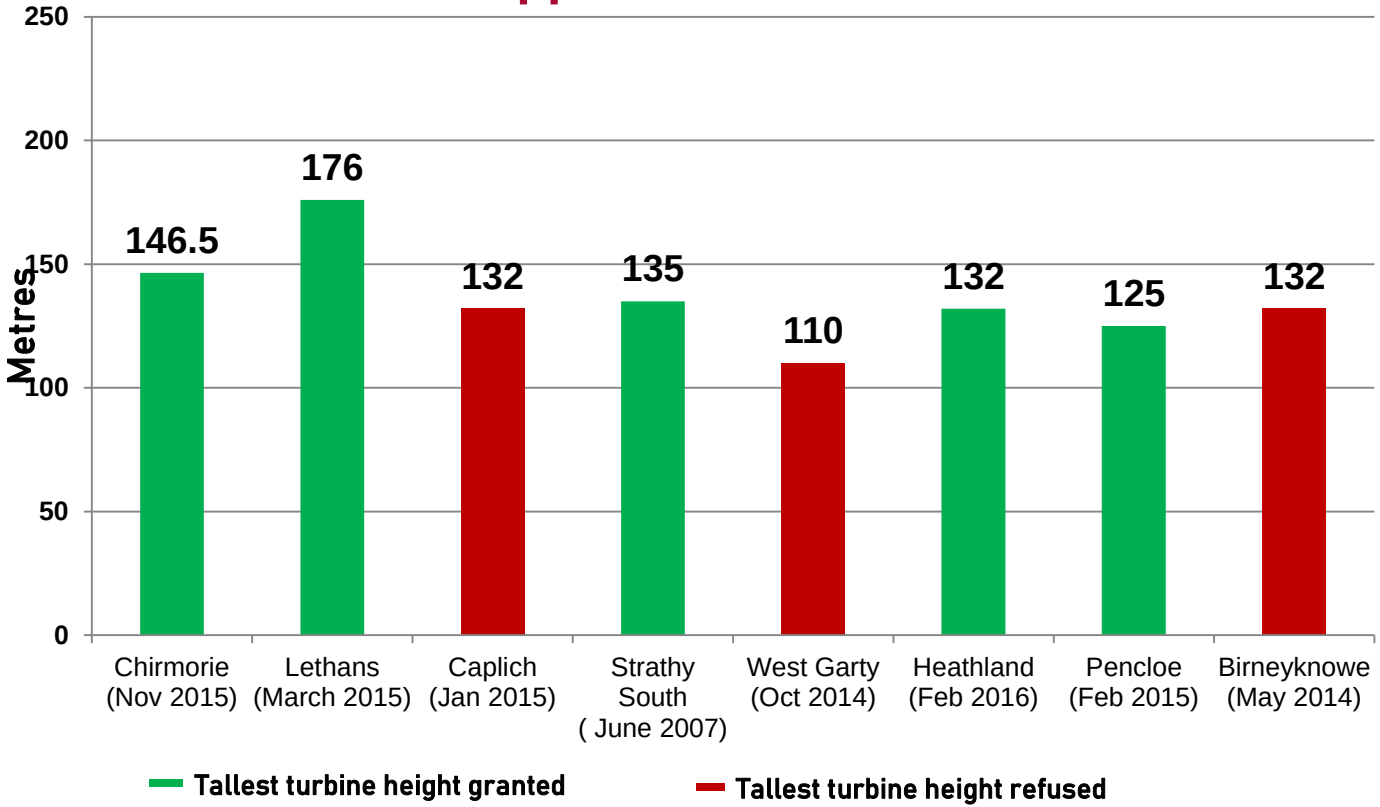
Distribution of projects in EIA scoping



Tip heights
Determined s.36 Applications – 2018



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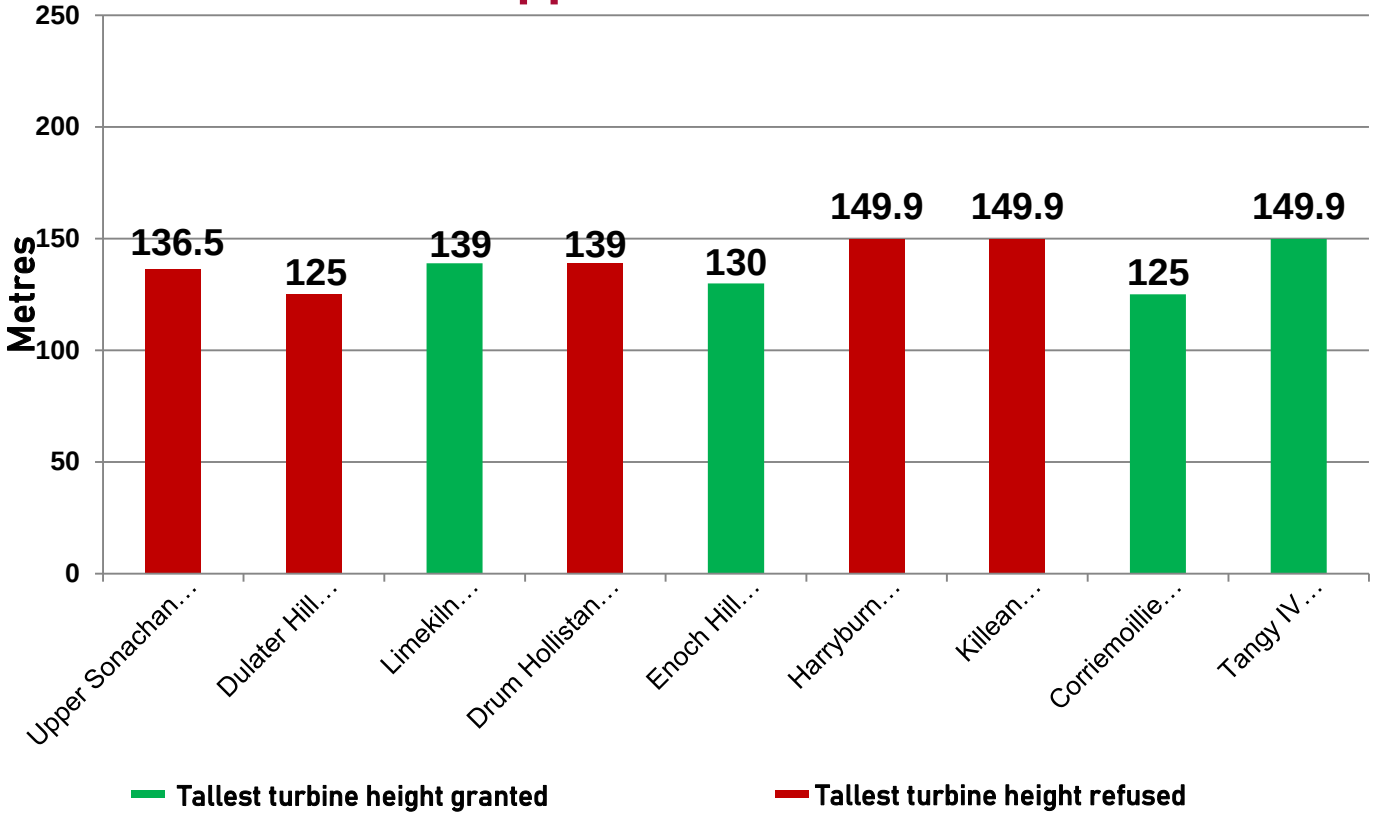
Determined s.36 Applications – 2019



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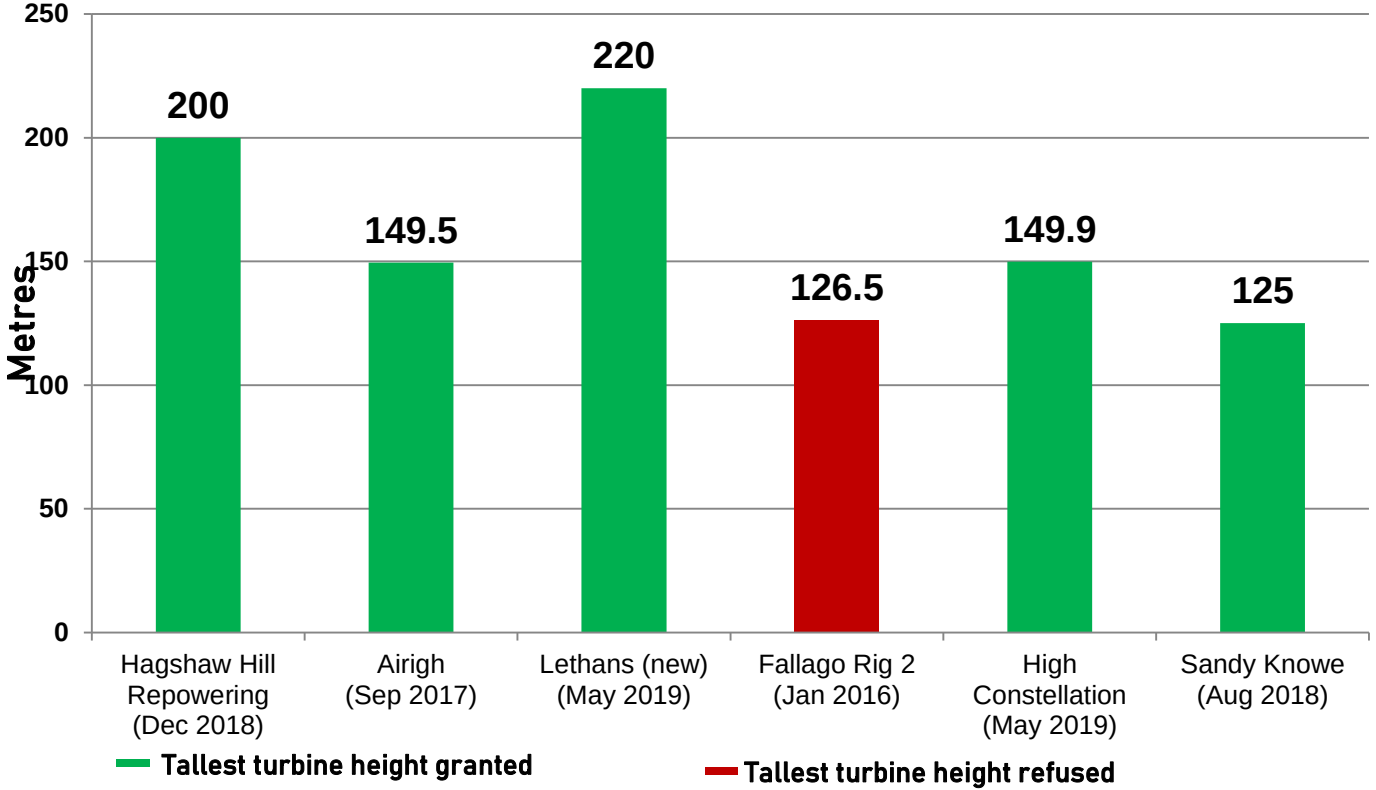
Tip heights
Determined s.36 Applications – 2020 (to end July)



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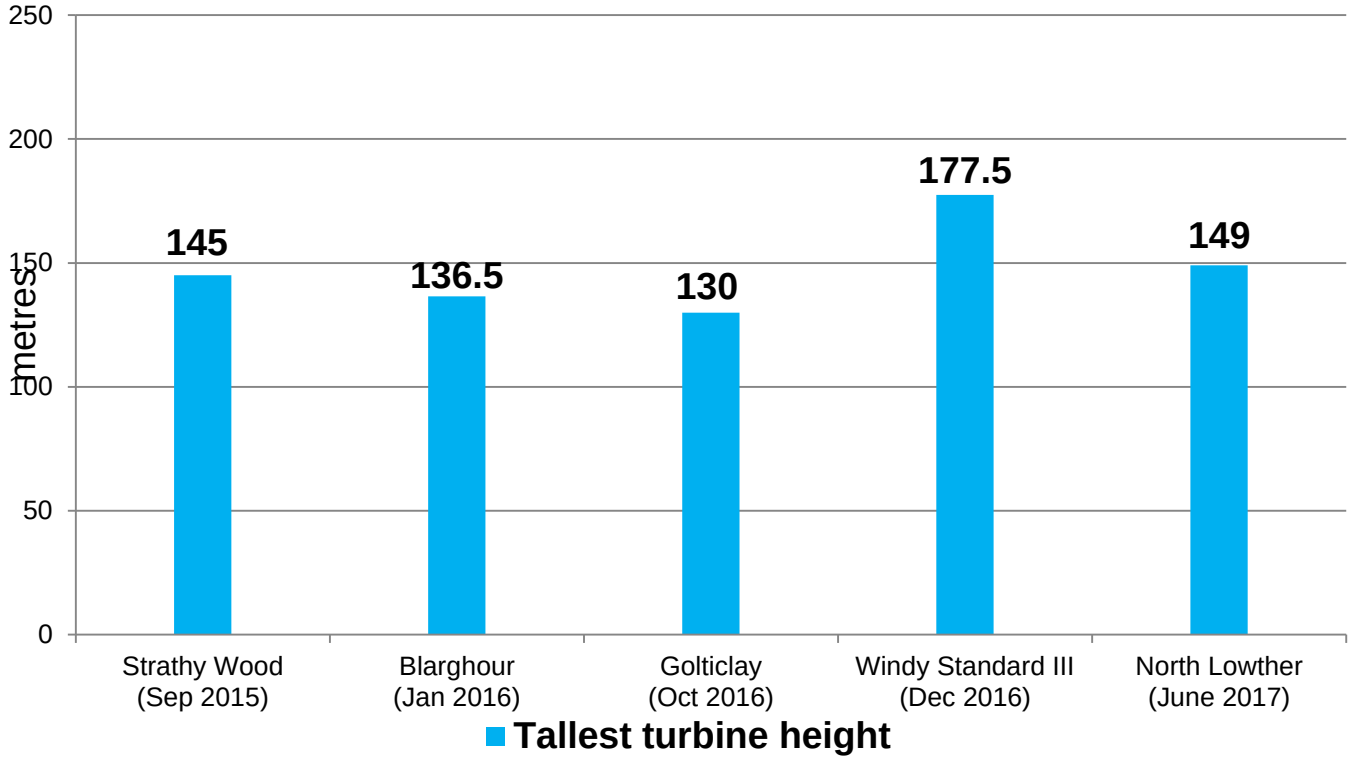
Tip heights – Undetermined s.36 Applications – submitted pre-2018



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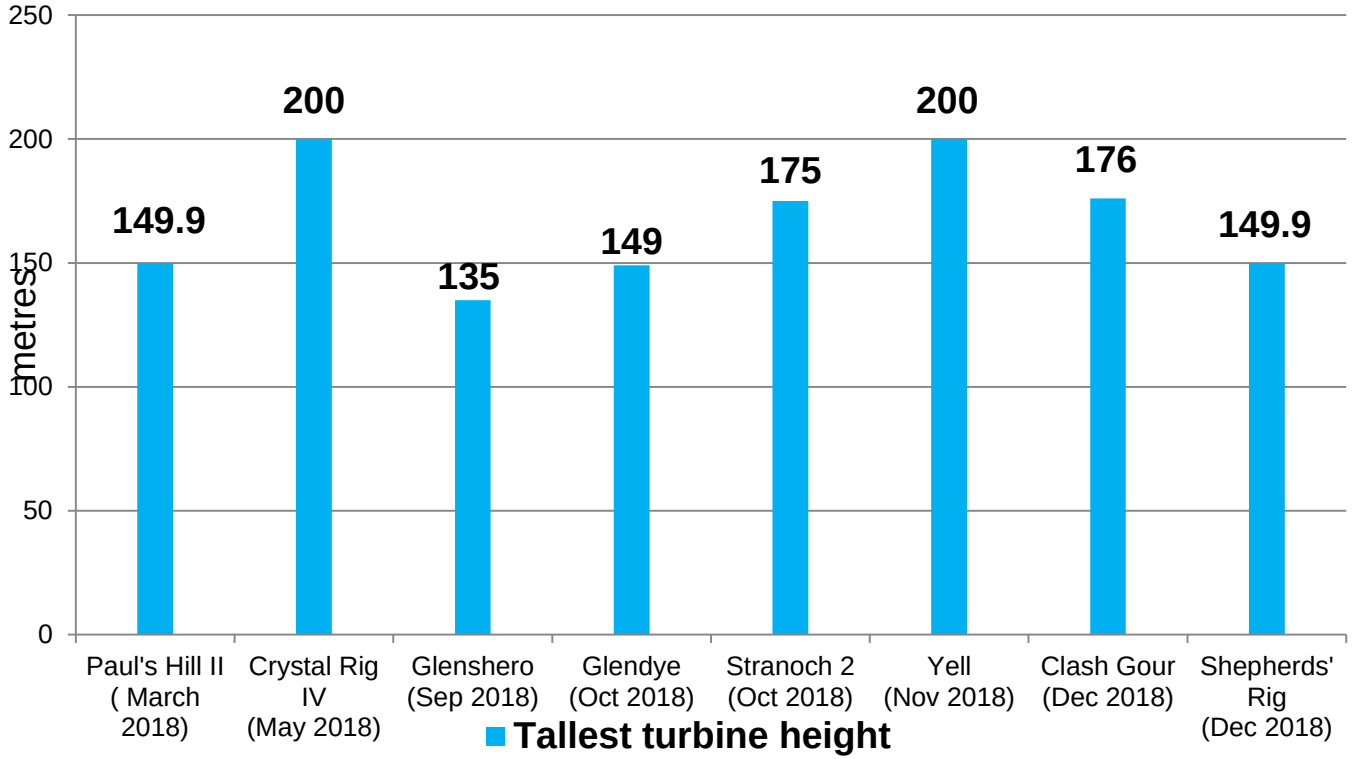
Tip heights – Undetermined s.36 Applications – submitted 2018



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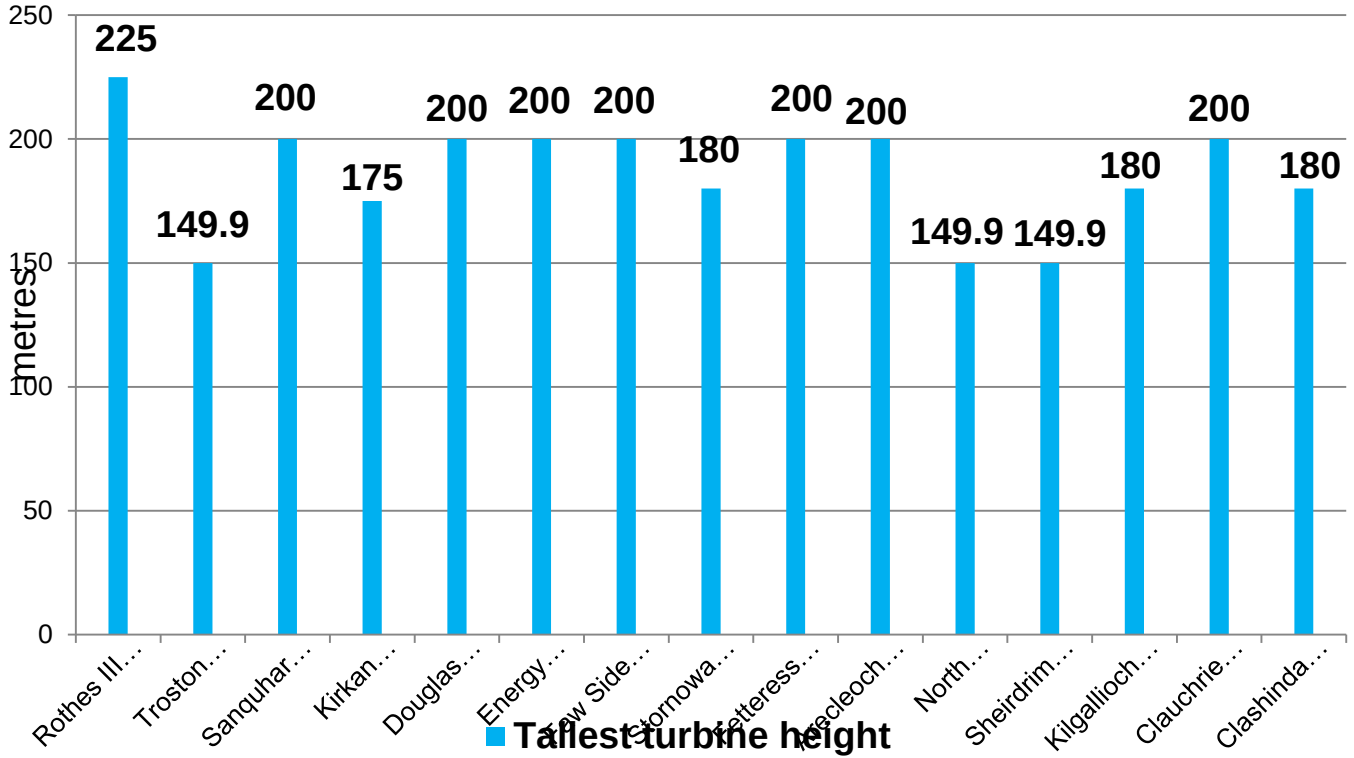
Tip heights – Undetermined s.36 Applications – submitted 2019



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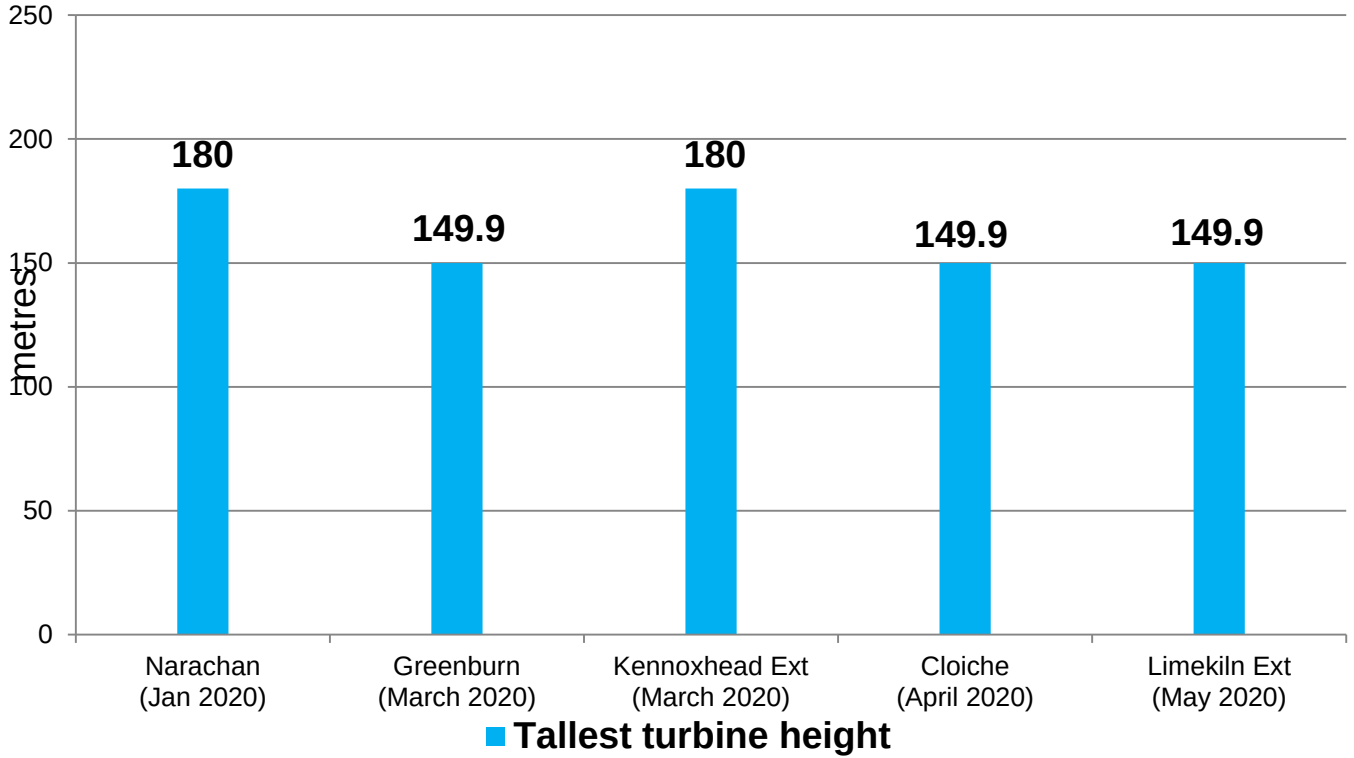
Tip heights – Undetermined s.36 Applications – submitted 2020 (to end July)



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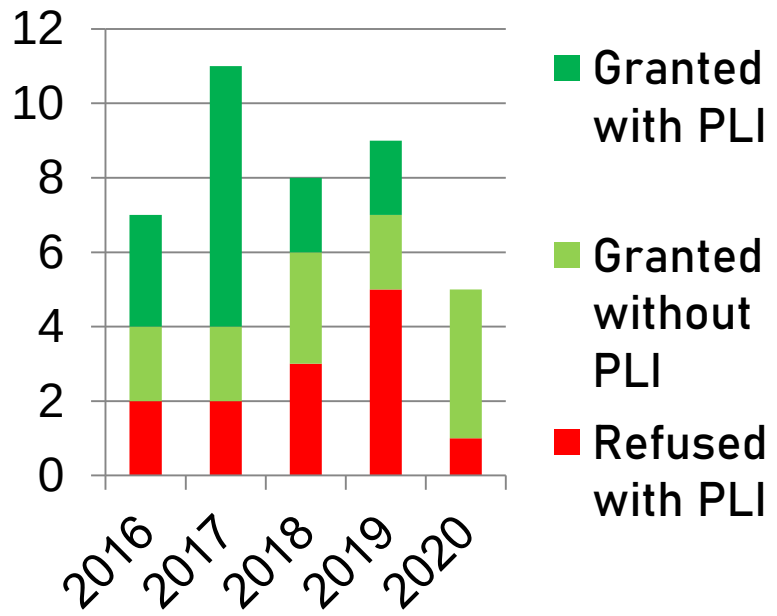
Wind Farm S.36 Consent Decisions: 2016-2020

	No. of Decisions	Percentage %
Total granted	28/41	68%
Granted with PLI	14/28	50%
Granted without PLI	14/28	50%
Total refused	13/41	32%
Refused with PLI	13/13	100%
Refused without PLI	0/13	0%
Total with PLI	27/41	66%
Total without PLI	14/41	34%



Total	Granted	Refused
With PLI	52%	48%
Without PLI	100%	0%

Pinsent Masons

Average Deliberation Periods for Determined s.36 Applications 2016–2020 (to end July)

Year	No. of decisions	Average Determination Period No PLI	Average Determination Period with PLI	Average "Desk Time" after PLI report	Annual Average Determination Period
2016	7	29 months	33 months	5 months	32 months
2017	11	24 months	43 months	7 months	40 months
2018	8	32 months	46 months*	6 months*	40 months*
2019	8	45 months	42 months	6 months	42 months
2020 (YTD)	5	22 months	53 months	23 months	30 months
5 Year Averages	**c. 9**	**30 months**	**44 months**	**9 months**	**37 months**

*Excluding Strathy South – determination period of over 10 years with 2 years "desk time"

Policy Issues

- Draft NPF4 delayed to Autumn 2021 (earliest)
- New Planning (S) Act 2019 – implementation delayed
- Existing framework does not reflect “climate emergency”
- Negative LDPs & SG still being rolled out
- Industry advocating an interim position statement to “plug the gap”
- Instead SG propose to remove the SPP “presumption”
- https://www.transformingplanning.scot/

Darren Cuming

Development and Consents Manager
EDF Renewables

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Developer View on Community Engagement/Virtual Consultation

Darren Cuming – Development and Consents Manager

SUMMARY

1. Introduction
2. The need for community engagement
3. Current practice
4. Impact of COVID
5. EDF R approach
6. Summary

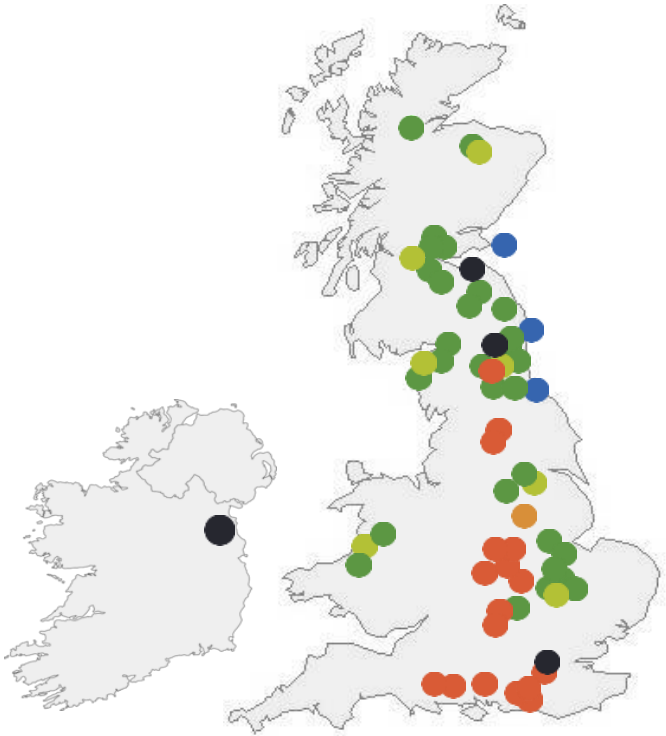
EDF RENEWABLES UK AND IRELAND

We're one of the UK's leading renewable energy companies, specialising in wind power, solar power and battery storage technology.

We develop, build, operate and maintain wind farms and other renewable technologies throughout their lifetime.

We have an operational portfolio of 36 wind farms – including two offshore wind farms – one of the largest operational battery storage units in Europe and we are putting roof-mounted solar installations

EDF RENEWABLES UK AND IRELAND - KEY FIGURES



- Onshore wind
- Offshore wind
- Battery storage
- PV solar*
- Service centres
- Offices

*are not all operational

4
Offices

36
Operational sites

7
Service centres

965
MW Gross
Capacity

DEVELOPER VIEW ON COMMUNITY ENGAGEMENT/VIRTUAL CONSULTATION

The need for community engagement

The scale of promoted renewable schemes means that there is a statutory requirement for consultation i.e. Section 36 projects or major developments

Proportionate approach to the scale of the project and what is proposed – new scheme, variation or extension

Responsible development means that engagement is a key aspect of progressing renewable projects

Engagement should not be seen as a ‘tick box’ exercise and be meaningful for all parties involved

It is a means of ensuring communities, consultees and other bodies are aware of proposals and can subsequently take informed views of projects

DEVELOPER VIEW ON COMMUNITY ENGAGEMENT/VIRTUAL CONSULTATION

Current engagement practices

Engagement principles have been well established over many years by the renewable industry, leading to many best practice examples

Many instances of going ‘above and beyond’ statutory or local requirements

Well trodden path of consultation, press notices, community meetings, website, public information days and subsequent documenting of activities to demonstrate effective engagement

Open and honest approach embedded within developers mind set

DEVELOPER VIEW ON COMMUNITY ENGAGEMENT/VIRTUAL CONSULTATION

COVID 19 Impacts on engagement

- Wide ranging industry impacts relating to public and business interaction since March
- Suspension of all public meetings until the end of the emergency period – currently 20th September 2020
- Community ‘face to face’ engagement at the heart of renewable energy proposals
- Scottish Government Introduced the Coronavirus (Scotland) Act 2020
- Amendment to Town and Country Planning Regulations and guidance on pre application consultation

DEVELOPER VIEW ON COMMUNITY ENGAGEMENT/VIRTUAL CONSULTATION

EDF Renewables response to COVID challenges

Worked quickly to understand the impacts and requirements of COVID impacts on project development, in particular relating to community engagement

Taken a proportionate approach to public engagement and balanced safety against the requirement to consult, engage and also progress projects through the planning system

Three examples of adaptation and differing approaches:

Shelloch – online virtual consultation

Sutton Bridge solar PV – online exhibition

Heathland – next phase of exhibitions to be virtual

DEVELOPER VIEW ON COMMUNITY ENGAGEMENT/VIRTUAL CONSULTATION

Summary and the future

Engagement techniques have remained static for a number of years and not fully embraced the technological advances

COVID has presented the opportunity to revisit engagement practices and update approaches in best practice

Embrace new ways of consultation and engagement to reach a wider audience

Blend of techniques not wholly reliant on face to face meetings


Thank you

Eleri Davies

Head of Consents UK – Onshore Wind
RWE Renewables

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Virtual Inquiries

Eleri Davies

Head of Consents UK (Onshore Wind)

6th August 2020

Virtual Inquiries

COVID-19 has forced a move towards more ePlanning, online consultations, and virtual hearings / inquiries…but will this become the norm post-COVID?

Appeals/Section 36 Examinations:

- Written Representations
- Hearing sessions
- Public Inquiry cross-examination sessions

Short-term: more written representations, with oral sessions held virtually where necessary

Post-COVID: 100% virtual unlikely but could a move to part face-to-face / part virtual become the new norm?

Key Considerations

- **Co-operation:** Reporters / Appellants / Applicants / Statutory Consultees / Third Parties
- **Capacity:** video conferencing – pros and cons
- **Management:** proactive Reporter, clear agenda, organised and self-disciplined participants
- **Fatigue:** shorter sessions / additional days
- **Effective presentation of case:** concise and focussed written and oral evidence
- **Public Participation:** impacted positively or negatively?
- **Cost and time savings, and potentially quicker decisions**

Current events provide a unique opportunity to push the boundaries and try out new ways of working which will undoubtedly fast-track the modernisation of the planning system

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