



scottish
renewables

ANNUAL REVIEW 2019-2020



In my introduction to last year's Annual Review I wrote that one issue had dominated the world agenda above all else: the declaration, by multiple states, of a climate emergency.

In this most extraordinary of years, the first part of that statement is still true. That the climate emergency would fail to capture headlines in 2020, we could never have imagined.

In coronavirus we have seen a life-changing pandemic bring home just how important the everyday essentials provided by our industry are. Never have heat and light been needed more than they have been during society's efforts to stop the spread of COVID-19.

So what else has changed in our 2019-20 membership year? And what, against all the odds, remains the same, for better or worse?

The early part of 2020 was, for Scottish Renewables as for so many of our member organisations, a time of coming to terms with new ways of doing business. For months, member organisations faced difficulties which in any other year would have seemed insurmountable: the race to complete environmental assessments during the rapidly-closing window in which doing so was possible, as well as the response to digital rather than live planning events were just two examples of how industry pulled out all the stops to make development happen safely.

We responded to your concerns by setting up our Industry Resilience Forum which, during the darkest days of the first lockdown, held weekly update meetings through which information from governments in Westminster and Edinburgh was passed to that Forum's 1,700 members.

So some things changed, but some things certainly did stay the same. Chief among them was that renewable energy has the power to form the backbone of not just our energy system, but also our economy. Those were messages we spread far and wide as part of activity to advocate for renewable energy's place at the heart of a green economic recovery from coronavirus.

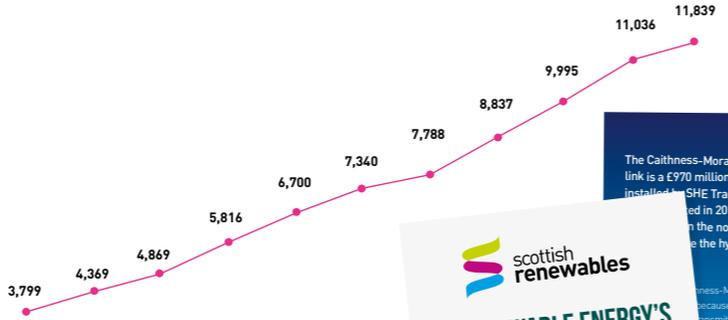
You can read more about that campaign, which involved more than 50 political meetings as well as new research and national media coverage, inside this document. I would urge you to do so to get a feeling for the quality of Scottish Renewables' work through one of the most difficult periods any of us can remember.

Many areas of our work have faced coronavirus-related delays, with numerous policy announcements pushed back or shelved. Most notably, Scotland's National Planning Framework 4 will not now appear in 2020, meaning the crucial reforms which are needed to enable the push to net-zero and beyond have slipped down political agendas. We have been more active than ever in this space in 2019-20; gathering member feedback to make what is thought to be the most comprehensive submission of any organisation to The Scottish Government's NPF4 Call for Ideas, then keeping interest in planning alive through communications work to tackle the removal of the presumption in favour of sustainable development and the decline and the number of local authority planners, among other issues.

I must also mention here the work of our Events team, who have used this once-in-a-career opportunity to pivot from physical to wholly-virtual events. Most recently our Annual Conference and the Scottish Green Energy Awards, which together would usually welcome around 2,000 guests, were both held online to widespread acclaim. No-one is more proud than I of their achievements and I would I urge you to join me in recognising the contribution Scottish Renewables' event programme has made to keeping the industry together at a time when it would have been so easy to exist in our silos.

Whatever challenges 2021 brings, be assured that Scottish Renewables has your back. Together we can keep this great industry of ours moving forwards, and I thank you all for your support in doing so.





RENEWABLE ENERGY'S RURAL IMPACTS

A guide to the benefits delivered by renewable energy projects across Scotland.

www.scottishrenewables.com

The Caithness–Moray electricity transmission link is a £970 million, 70-mile undersea cable installed by SHE Transmission over four years and completed in 2019. It was the largest project in the north of Scotland's electricity industry and marks the start of the hydro development era of the 21st century.

The Caithness–Moray, and the economic benefits it brings, are a testament to Scotland's diverse geography and abundant natural resources – winds, tides and rainfall – to which we are committed.

The Caithness–Moray project employed 217 local people and created 91,000 bed nights in Caithness, Moray and Highland. The project is worth an estimated £4.5 million.

Registrations are registered on the Highlands and Islands portal, established in 2017, which allows over 100 Highland and Islands Councils to award a million of contracts were awarded through the portal during the Caithness–Moray project which benefited include AJ Macfarlane (cultural steel work), MM Maser (cultural steel work), Owen O'Leary (Thurso, cleaning), and John O'Leary (Borera, civil engineering).

2019-20 IN REVIEW
OUR IMPACT

Onshore wind powers up

Onshore wind now back in the CID – Scottish Renewables' top ask of UK Government fulfilled for members.

Linking employment to deployment

Produced new methodology to show the impact of our industry linking employment to deployment for the first time. 16GW of renewable electricity in Scotland – 1,200 jobs and 1.13bn of GVA.

Responding and supporting: coronavirus and Scottish Renewables

Our Industry Resilience Forum supported members at every step, working for members to keep industry moving. Then 30 political meetings and coverage in The Times secured government commitments that renewables will be at the heart of the post-COVID economic kick start.

Hotting up at Holyrood

Our work, alongside members, produced the Scottish Government's Heat Networks Bill. Addressing regulation and incentivisation, it'll boost the business case for decarbonising the way we keep warm.

Strong winds, delicately handled

Our responses to the Sectoral Marine Plan and Offshore Wind Policy Statement, as well as ScotWind Leasing and as a key part of SOWEC, cement Scottish Renewables' leadership position in this growing sector.

MEMBERSHIP OPPORTUNITIES

JOIN OUR BUSINESS NETWORK AND MAKE YOUR VOICE HEARD
WORKING TOGETHER FOR A BRIGHTER FUTURE

A BRIGHTER FUTURE
Priorities for the next Scottish Government

OUR DRIVE TO DELIVER POLICIES ON GROWTH

Scottish Renewables is the voice of Scotland's renewable energy industry. Our vision is for a Scotland leading the world in renewable energy. We work to grow Scotland's renewable energy sector and sustain its position at the forefront of the global clean energy industry.

The sectors we represent deliver investment, jobs, social benefits and reduce the carbon emissions which cause climate change.

In representing them, we aim to lead and inform the debate on how the growth of renewable energy can help sustainably heat and power Scotland's homes and businesses.

OUR ANNUAL REVIEW BRINGS TOGETHER THE KEY PIECES OF WORK WE HAVE CARRIED OUT ON BEHALF OF OUR MEMBERS IN THE PRECEDING MEMBERSHIP YEAR, GROUPED UNDER THE HEADINGS OF OUR MEMBER FORUMS.

ECONOMICS AND MARKETS

Our members work across all renewable energy technologies, in more than 70 countries, to provide the clean energy the world's economies need to drive economic growth and tackle climate change.

A viable route to a viable market is key to sustaining these diverse businesses. We work on behalf of our members to ensure renewable energy policy supports our industry, in all its forms.

We create and develop campaigns for policy positions which support the growth of renewable energy while delivering economic, environmental and social benefits.

In 2018-19 Scottish Renewables:

- Achieved our number one policy position when onshore wind and solar PV returned to the Contracts for Difference mechanism. Our communications around the announcement reiterated our response to the UK Government's consultation on the CfD: that while one barrier to the development of our industry had been removed, others remain.
- Worked through the COVID-19 pandemic with governments in Edinburgh and London to ensure the renewable energy sector was supported by both administrations.
- Provided evidence to both governments of the impact of COVID-19 on the green energy industry and the support it needs, including successfully asking for extensions to government support deadlines.

- Campaigned for renewable energy to be at the heart of a green economic recovery from COVID-19, working with our elected Board to create a package of policies which, if deployed rapidly, would produce the stimulus needed to boost economic growth while contributing to meeting UK and Scottish climate targets.
- Engaged with the UK Government, setting out our members' priorities for the UK budget in March. Our key asks were set out in a letter to the then-Chancellor of the Exchequer, Sajid Javid.
- Urged the Scottish Government to consider low-carbon heat, skills and innovation, planning and local energy systems in its Budget.

PLANNING AND CONSENTS

Scotland's planning system lies at the heart of the development of our renewable energy resource, and as such is a key focus of Scottish Renewables' work.

That work continued in 2019-20 when we advocated for a National Planning Framework which recognises renewable energy development as a key driver of economic growth and is essential to achieving our net-zero target.

In 2019-20 Scottish Renewables:

- Worked with our members on one of the most complex policy development processes in recent years to produce Scottish Renewables' Position Statement on National Planning Framework 4 (NPF4). This Position Statement is supported by five additional Supplementary Papers on the key issues which affect deployment levels: Landscape Capacity Studies, peatlands, spatial planning, climate change and deployment targets and wild land. Together they formed the most comprehensive response to the Scottish Government's Call for Ideas.
- Drew together the Position Statement and Supplementary Papers to form the basis of an advocacy campaign with key stakeholders to build awareness and support for our policy asks. Engaged with the Scottish Government's Wind Energy Policy and Development Team, Planning & Architecture Team and NPF4 Team, and will continue to work with them and other key stakeholders on the development of NPF4.
- Worked with members to ensure high-priority emerging Local Development Plans properly reflect the imperative for new, extended or replacement renewable energy developments which are needed to meet Scotland's climate change targets and achieve

net-zero by 2045.

- Raised concerns after the Scottish Government opened a consultation on Scottish Planning Policy and Housing: Technical Consultation on Proposed Policy Amendments which would have seen the Presumption in Favour of Sustainable Development removed from SPP. Worked with members and other organisations to seek clarity on a policy change which affected our members' interests, issuing a press release to highlight the issue more widely. Secured a Chief Planner's letter stating the current policy should still be used until the consultation is concluded.
- Held a webinar with Scotland's Chief Planner, Deputy Chief Planner, key decision-makers and experts in the field on the impact of the Planning (Scotland) Act 2019 and the potential effect of National Planning Framework 4 on plan-making and future decisions affecting Scotland's renewable energy sector.
- Continued to promote our position that wind farm development in Scotland can be beneficial to peatland restoration, working with members to produce a document which highlights the benefits of our industry to the restoration and management of sensitive peatland habitat.
- Participated in a National Peatland Group meeting, highlighting the peatland restoration and management work that our members have undertaken on wind farm sites, working with partners to agree an update of The Scottish Government's carbon calculator and addressing gaps in data as a key priority.
- Presented at a Heads of Planning Scotland

WORKED WITH OUR MEMBERS ON ONE OF THE MOST COMPLEX POLICY DEVELOPMENT PROCESSES IN RECENT YEARS TO PRODUCE SCOTTISH RENEWABLES' POSITION STATEMENT ON NATIONAL PLANNING FRAMEWORK 4

meeting on the role of the planning system in delivering net-zero, as well as on threats and opportunities of planning reforms such as NPF4.

- Argued that The Scottish Government's consultation on Planning Performance and Fees should 'be proportionate, fair and ultimately sustainable'.
- Worked with Stephenson Halliday on behalf of our members to respond to NatureScot's consultation on its draft guidance on Landscape Sensitivity Assessment, with the objective of ensuring a meaningful change in approach to the consideration of landscape sensitivity in relation to renewables projects.
- Provided newly-refined, regularly-updated data from UK Government on the status of Scottish onshore and offshore wind projects in the planning process, providing certainty and insight for supply chain members which are looking to invest or upskill.

ONSHORE RENEWABLES

2020 was a big year for onshore renewable energy, with the UK Government's lifting of a ban on access for onshore wind and solar PV to the Contracts for Difference mechanism paving the way for a resurgence in Scotland.

Our work on behalf of members continues, however, as we seek to overcome barriers which could forestall the development of new projects and the repowering of existing sites as we move towards net-zero.

In 2019-20 Scottish Renewables:

- Produced an infographic showing Scottish Renewables' successful four-year campaign, on behalf of members, to return onshore wind and solar PV to the Contracts for Difference mechanism. Then engaged with Ministers and civil servants at Westminster, as well as using Ministerial-level influence from Holyrood, to press for timely and regular auctions through which the development of Scotland's onshore wind sector can be supported.
- Updated and published version three of the Guide to Hydropower Construction Good Practice. Jointly produced by Scottish Renewables, Scottish Natural Heritage (now NatureScot), and The Scottish Environment Protection Agency, it provides advice to all stakeholders involved in development and construction of a hydro scheme, minimising construction

impacts and highlighting legislative compliance requirements.

- Kept up pressure to ensure that onshore wind can continue as the backbone of Scotland's future energy system, carrying out research which showed that almost 50 wind farms which could power the equivalent of 850,000 homes risked losing vital planning permission unless rules on their access to the energy system were changed.
- Continued to meet regularly with NatureScot to discuss member feedback and next steps on aviation lighting, key messages for National Planning Framework 4 and next steps on landscape sensitivity studies.
- Told of our disappointment at the conclusions of the Tretton Review of Business Rates for Small Scale Hydro after a two-year inquiry, and continued to work on behalf of members to ensure a future for this particularly Scottish of industries.
- Continued to engage with the Scottish Government's Wind Energy Policy and Development Team and Energy and Climate Change Directorate on the progress of Eskdalemuir and NPF4. Scottish Renewables also now acts as host for the minutes of the Eskdalemuir Working Group, our participation in which on behalf of industry remains the only viable way to solve issues in this promising region.
- Voiced our support for BEIS to provide an extension to pre-accredited Feed-in Tariff projects to mitigate COVID-19 commissioning delays – a request which was subsequently granted.

OFFSHORE RENEWABLES

Scotland's offshore energy resource has been of global importance for half a century, and the past 12 months have brought closer connections than ever between fossil and renewable energy industries. With the launch of ScotWind leasing now underway, the stage is set for enormous developments.

Scottish Renewables continues to work on behalf of its members to ensure that the policy environment is optimised to deliver gigawatts in the water, from fixed and floating offshore wind to tidal and wave power.

In 2019-20 Scottish Renewables:

- Worked extensively with members to respond to and influence the development of the Sectoral Marine Plan and Offshore Wind Policy Statement, which will provide the foundations for the growth of our offshore wind sector over the coming decade. From the draft consultation through to final publication this autumn, we developed comprehensive policy responses on all aspects of this work and engaged specialist consultants on behalf of industry. The raising of the Scottish Government's 2030 ambition to 11GW was a welcome outcome of this work.
- Engaged regularly with Crown Estate Scotland and stakeholders to represent industry views on the ScotWind leasing round, particularly around the requirements on Supply Chain Development Statements.
- Led the Communications and Barriers to Deployment workstreams of the Scottish Offshore Wind Energy Council, launched in late 2019 with "bold plans" to increase the size of the sector and build enough capacity to power every household in Scotland twice over. We have secured funding through SOWEC to take forward an important project on Habitats Regulations Assessments.

- Joined with the Energy Skills Alliance, leading a workstream which will begin to look at the skills required to meet net-zero and how they can be transferred from the oil and gas sector into the renewable energy industry.
- Continued to represent members in the politicised debate around the offshore wind supply chain and its local content. Publishing a first-of-a-kind document, Scotland's Offshore Wind Sector: Supply Chain Impact 2018-19, clearly showing the benefits this growing sector is already bringing for SME supply chain businesses across Scotland.
- Played a key role in bringing together the offshore wind industry with other stakeholders such as RSPB and NatureScot to take forward the development of a Scottish Marine Environment Enhancement Fund.
- Represented industry in a wide range of forums, from consenting and research (ScotMER) to UK-wide discussions on aviation and offshore transmission, and responded to consultations on topics ranging from decommissioning to fisheries mitigation.
- Championed wave and tidal pioneers through our responses to the CfD consultation and marine energy Call for Evidence, as well as our participation in the Scottish Marine Energy Industry Group and Marine Energy Council.
- Published an industry vision paper on floating wind and have collaborated on ambitious action across our sector, including with the new Floating Wind Centre of Excellence, to capture the benefits of Scotland's deep waters.

KEPT UP PRESSURE TO ENSURE THAT ONSHORE WIND CAN CONTINUE AS THE BACKBONE OF SCOTLAND'S FUTURE ENERGY SYSTEM

LOW-CARBON HEAT

Keeping Scotland warm uses more than half of the energy we consume in Scotland, but we have barely scratched the surface of decarbonising heat. Once again 2019-20 saw a strengthening of Scottish Renewables' focus on this key area, working to recruit a new staff member to focus on policy development and with our members as the long-awaited Heat Networks Bill began its passage through the Scottish Parliament.

In 2019-2020 Scottish Renewables:

- Published a new report, Piping Hot, which detailed how the Scottish Government could support the deployment of low-carbon heat networks alongside new research which uncovered 46 potential projects in Scotland's seven cities.



REPRESENTED THE INDUSTRY AT A SCOTTISH PARLIAMENT ECONOMY, ENERGY AND FAIR WORK COMMITTEE INQUIRY INTO THE HEAT NETWORKS BILL

- Represented the industry at a Scottish Parliament Economy, Energy and Fair Work Committee inquiry into the Heat Networks Bill, following on from our consultation submission. At our appearance we highlighted the opportunities the Bill can provide to support a green recovery while contributing to decarbonising Scotland's heat demand.
- Participated, alongside key members, in the Scottish Government's Heat Networks Regulation Working Group. This group published an interim recommendations report in December 2019, echoing our call for licensing, exclusive zones and measures to de-risk demand.
- Engaged with the Scottish Government to help develop preparatory work on a formal consultation process in the 2024 New Build Zero Emissions Standard, which is being developed to ensure all new homes use renewable or low-carbon heating from 2024.

GRID, SYSTEMS AND STORAGE

Generating energy is only half of the puzzle - transmitting it, storing it, and using it in the most efficient ways possible are all essential if our industry is to meet its full potential. Scottish Renewables' members rely on us to represent them in this complex area, where modifications and amendments happen rapidly and can have multiple unforeseen consequences.

In 2019-2020 Scottish Renewables:

- Welcomed new Chief Executive of Ofgem, Jonathan Brearley, as a speaker at our Annual Conference as well as highlighting in a letter the need to ensure that reforms to network charging must support the achievement of net-zero targets. The letter also raised network charging and grid access issues and made the case for anticipatory investment in infrastructure.
- Commissioned a report alongside RenewableUK which examined the cumulative impact of grid charging reforms. Held discussions with Ofgem on its views of the research and continued to engage through quarterly meetings on the progress of the ongoing Access and Forward-Looking Charges Review.
- Worked to represent members through the coronavirus pandemic, raising concerns with National Grid ESO about the process through which new powers surrounding the Disconnection of Embedded Generation were to be used, calling for a sustainable long-term solution which considers how generators are compensated.
- Raised concerns that Ofgem's RIIO-2 Draft Determinations would significantly risk our ability to meet net-zero while delivering long-term value for money and stimulate a green economic recovery.
- Fed into a BEIS and Ofgem consultation on Reforming the Energy Industry Codes., arguing for changes to the current code of governance framework to better facilitate strategic changes in the sector as we transition to a more flexible energy system. Pressed for a clearer regulatory framework that will encourage more innovation to come forward.
- Attended the Energy Networks Association's Network Innovation Strategies workshop on behalf of members to discuss the key themes, focus areas and challenges on which network innovation should focus in future.
- Delivered a keynote speech on behalf of generators as part of The Scottish Government's Networks Vision Summit, focusing on existing barriers to renewables expansion including network charging and grid access, as well as making the case for more anticipatory investment in infrastructure.
- Continued to bring together members at Grid & Systems Member Forums, including one at which members heard from Baringa Partners on recent research examining the current range of grid charging reforms and their likely combined impact on the renewables industry.

COMMISSIONED A REPORT ALONG WITH RENEWABLEUK WHICH EXAMINED THE CUMULATIVE IMPACT OF GRID CHARGING REFORMS

IN THE PARLIAMENTS

We have continued to advance our political engagement across Westminster and Holyrood, building new and developing existing relationships, ensuring that we have parliamentary advocates from across the political spectrum.

In 2019-2020 Scottish Renewables:

- Continued to have regular meetings with Paul Wheelhouse MSP, Minister for Energy, Connectivity and the Islands, in order to provide industry updates. Key policy issues which have been discussed with the Minister include COVID-19 guidelines, planning and NPF4, supply chain, the Sectoral Marine Plan and renewable heat.
- Engaged with HM Treasury to update on a range of reserved policy issues. The timing and capacity of the next CfD auction and future support – both financial and non-financial – for renewable heat were discussed, as well as the opportunity to boost exports from the sector and the need to begin planning for skills transfer from carbon-intensive industries during the energy transition. Scotland's ability to feed into the UK Government's 'levelling-up' campaign was also on the agenda.
- Built new links with opposition parties at Westminster and Holyrood and used their influence to ensure that governments are held to account, including submitting Parliamentary Questions and Motions on topics including the green recovery, renewable heat, planning, renewable skills and peatland restoration.
- Continued to ensure Scottish Renewables members were represented as rapid changes in policy from both governments affected industry through the coronavirus pandemic.
- Met with Douglas Ross MP, then-Parliamentary under Secretary of State for Scotland, to discuss support from the UK Government for the renewable energy industry regarding COVID-19. Key policy issues raised were a green economic recovery, extending the Renewable Heat Incentive and support for key workers.
- Gave evidence on our submission to a Scottish Parliament inquiry into Scotland's progress towards its 2020 renewable heat target. The Economy, Energy & Fair Work Committee heard about heat networks, the future of the RHI and employment impacts of the transition during a wide-ranging session.
- Took part in a roundtable on COP26, chaired by Moray MP Douglas Ross and organised by CBI Scotland.
- Met Murdo Fraser MSP to discuss potential development in offshore wind in Scotland. Mr Fraser, MSP for Mid Scotland and Fife, was interested in future sites and the opportunities which could develop for local supply chain companies.



- Appeared in front of the Scottish Parliament's Economy, Energy & Fair Work Committee to discuss local energy – which included marine energy, hydropower and wind and solar – and also the COVID-19 Committee to discuss a green recovery.
- Met with David Duguid MP, the new Parliamentary under Secretary of State for Scotland, and delivered a roundtable with the SNP Westminster group which was attended by 16 MPs including Alison Thewliss, SNP Shadow Chancellor, and Drew Hendry, SNP Shadow Secretary of State for Business.
- Met separately with John Lamont MP, a Conservative member of the Scottish Affairs Committee, and Alan Brown MP, SNP Energy Spokesperson at Westminster.

GAVE EVIDENCE ON OUR SUBMISSION TO A SCOTTISH PARLIAMENT INQUIRY INTO SCOTLAND'S PROGRESS TOWARDS ITS 2020 RENEWABLE HEAT TARGET



TELLING OUR STORY

Green energy is at the heart of the national and global conversation about a carbon-neutral future. Scottish Renewables strives to reach a diverse audience and works across sectors to publicise and educate. In testing pandemic times, we have adapted to be more creative with events and in communicating with our audience.

In 2019-2020 Scottish Renewables:

A GREEN ECONOMIC RECOVERY FROM CORONAVIRUS — WITH RENEWABLE ENERGY AT ITS HEART.

- Worked across all political parties to advocate for a green recovery from the coronavirus pandemic, focussing on exports, large infrastructure projects and the introduction of a Renewable Transition Training Fund.
- Held 46 political meetings to advocate for our green recovery policy positions, resulting in Parliamentary Questions, unsolicited enquiries from politicians and support from across the political spectrum.
- Produced new research to support our green recovery work which showed that countries with more than \$3.6 trillion in GDP have placed a green recovery at the heart of their post-pandemic response.
- Carried out fresh research which linked deployment with employment, showing how each GW of renewable electricity generation in Scotland to date has created 1,500 jobs and added £133 million of GVA to Scotland's economy. In partnership with The Times this work

achieved national media coverage and helped cement our green recovery work.

- Carried out interviews with 100 oil and gas workers to gauge their appetite for a move to the renewable energy sector as part of our advocacy for a Renewable Transition Training Fund. That work found eight in ten Scots oil workers have considered that their careers could be impacted by actions being taken to tackle climate change and that more than three-quarters are positive about retraining to join the renewable energy industry.
- Held a green economic recovery roundtable with Scottish Renewables' members and Fiona Hyslop, Scottish Government Cabinet Secretary for Economy, Fair Work and Culture.

OUTCOMES

- Our key recommendation for a Renewable Transition Training Fund to support more professionals to join our industry was raised by Scottish Green Party co-leader Patrick Harvie at First Minister's Question Time, and also by Gillian Martin at Economy, Fair Work and Culture Portfolio Questions. The announcement of £120 million of training funds by The Scottish Government in its Programme for Government echoed our calls for a Renewable Transition Training Fund.
- New work, sparked by Minister for Trade, Investment and Innovation Ivan McKee, to capitalise on renewable energy's export potential.
- Creation of a Scottish Government Task Force for Economic Recovery in the Energy Sector to focus on

championing the economic opportunities for the energy sector in the green economic recovery. The group, of which Scottish Renewables is a member, will develop a list of immediate sector-wide projects to drive and support existing technologies and large-scale pilot projects.

- Reiteration of the importance of large-scale development to meet net-zero in Scottish Government communications, including the Offshore Wind Policy Statement.

OTHER CAMPAIGNING WORK

- Launched a report which shows the benefit of renewable energy to rural areas, generating associated media coverage and widespread support from member organisations. The report is an easily-accessible review of five economic studies carried out over the past three years and shows the impact of wind and hydro projects.
- Appeared in a new video by VisitScotland, with Claire Mack promoting Scotland to its international business audience and "looking forward to finding the solutions to power global problems".
- Continued to demonstrate the benefits of Scottish Renewables membership to both potential and existing members, producing a short video setting out some of the achievements we delivered on behalf of our members in 2019/20.

- Worked with leading industry experts as part of an internal membership campaign to produce the most comprehensive response to the Scottish Government's Call for Ideas on the upcoming NPF4. In addition to Scottish Renewables' Position Statement on NPF4, SR worked with subject matter experts to produce detailed papers on key priorities to the sector, including deployment levels, Landscape Capacity Studies, peatlands, spatial planning and wild land, to ensure that these issues were fully visible in the debate. The Scottish Government's independent analysis of responses to the Call for Ideas largely reflected messages from our submissions, including placing the planning system at the heart of the climate change agenda, demonstrating that industry's asks are at the forefront of policymakers' minds.

- Took industry's coronavirus concerns to governments in London and Edinburgh – then brought the latest updates from them straight to member inboxes via a newly-created, 1,700-member Industry Resilience Forum. We invested in new project tracking tools to ensure all team members were up to date on developments, then passed our learnings to our members on weekly Industry Resilience Forum Zoom calls.
- Joined with EnergyUK, RenewableUK and the Solar Trade Association to feed industry concerns on COVID-19 directly into Number 10. In Scotland, we appeared before the Scottish Parliament's Economy, Energy and Fair Work Committee inquiry into COVID-19. Our submission focused on the immediate impact of the pandemic on the renewable energy industry before moving on to address future support which may be required due to the public health emergency.

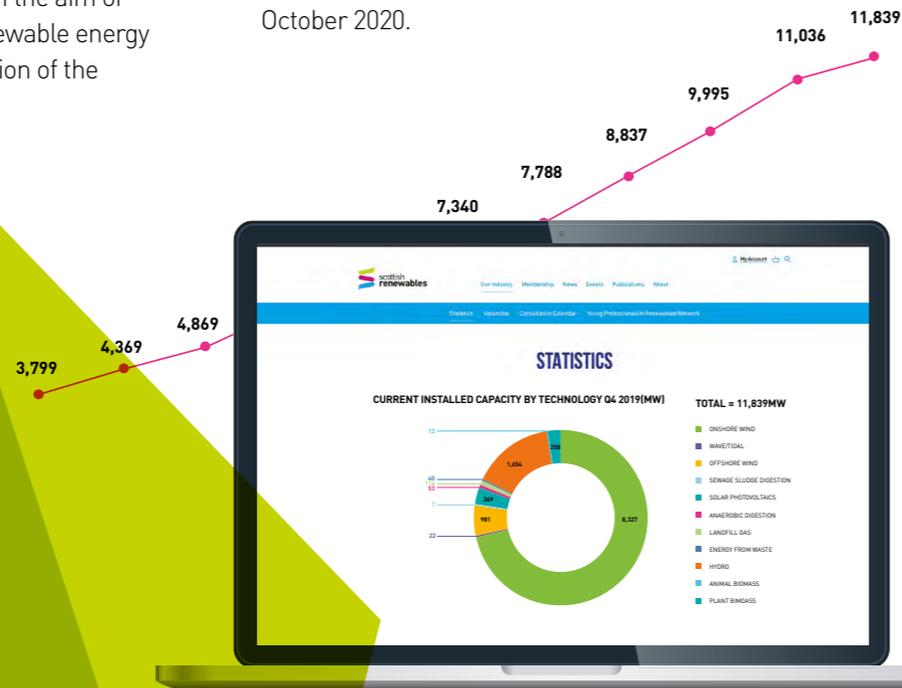
LEADING THE DEBATE

Our team is at the forefront of providing and developing credible data and analysis and leading research on the challenges to the growth of renewable energy in Scotland. Scottish Renewables' 2019-2020 publications led the way: they were bigger, bolder and more informative than ever before. They set out the industry's position and are key points of reference for politicians, civil servants and the media.

In 2019-2020 Scottish Renewables:

- Reacted to a change in the date of the COP26 conference, organising a webinar for members with Nigel Topping, the UK's High Level Climate Action Champion. Nigel discussed how members could get involved in the Race to Zero campaign and answered questions on COP as a previous attendee. Continued to develop a package of communications work around COP26 with the aim of highlighting the contribution Scottish renewable energy companies can make to the decarbonisation of the world's energy systems.

- Sparked discussion in the Scottish Parliament by arranging a joint meeting of the Cross Party Groups for Renewable Energy and Energy Efficiency (SPREEE) and Oil & Gas. A packed room heard from companies across both Scottish Renewables' and Oil and Gas UK's memberships at the event, which was chaired by Scottish Conservatives Shadow Minister for Energy, Connectivity and the Islands Alex Burnett MSP.
- Developed a new workstream on the energy transition specifically focussing on skills, working with organisations including the Energy Skills Alliance and the Offshore Wind Industry Council on pieces of work to scope current and future skills supply and demand across all energy sectors.
- Continued to update the Renewables in Numbers page on our website. The page is based on official government figures and provides an accurate, credible and referenced source for both our work and stakeholders. The page was viewed more than 15,000 times in the 12 months to October 2020.



THE RENEWABLES IN NUMBERS PAGE OF OUR WEBSITE WAS VIEWED MORE THAN 15,000 TIMES IN THE 12 MONTHS TO OCTOBER 2020

- Set up a new Industry Resilience Forum to keep members abreast of latest developments and take feedback on the new and complex challenges presented by the coronavirus pandemic.
- Held weekly Industry Resilience Forum update calls at the height of the pandemic and produced and maintained a page on our website as a quick-reference guide for members on COVID-19 issues.
- Developed new audiences for our work and that of our members with a webinar focussing on the industry's recovery from COVID-19 at which discussion between Scottish Renewables, ITPEnergised and TLT looked at the challenges ahead and how diverse businesses had adapted.
- Increased female representation at Scottish Renewables events by 5.5% to 37.5% between October 2019 and September 2020. Work continues to grow this figure further.

- Underlined our commitment to increasing female representation in the renewable energy industry, with SR CEO Claire Mack writing about her own experiences in national media. In the article in Scotland on Sunday, she said: "As a woman working in renewables I'm heartened every day to see others forging the same path, making careers in the new energy system and joining us in the race to meet our net-zero targets."

DEVELOPED NEW AUDIENCES FOR OUR WORK AND THAT OF OUR MEMBERS WITH A WEBINAR FOCUSING ON THE INDUSTRY'S RECOVERY FROM COVID-19

REPRESENTING OUR MEMBERS

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

First Minister's Scottish 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

Bioenergy Task Force
(Scottish Government)

Marine Energy Industry Group
(Scottish Government)

Charging Futures Forum
(Ofgem)

Distributed Energy Resources Steering Group
(Energy Networks Association)

Hydropower Task and Finish Group
(Scottish Government)

Scottish Wind Farm Bird Steering Group
(NatureScot)

Heat Stakeholder Advisory Group
(Scottish Government)

Scottish Offshore Wind Energy Council
(Scottish Government)

- Barriers to Deployment Workstream (lead)
- Developers Workstream
- Communications (lead)

Offshore Wind Industry Council
(UK Government)

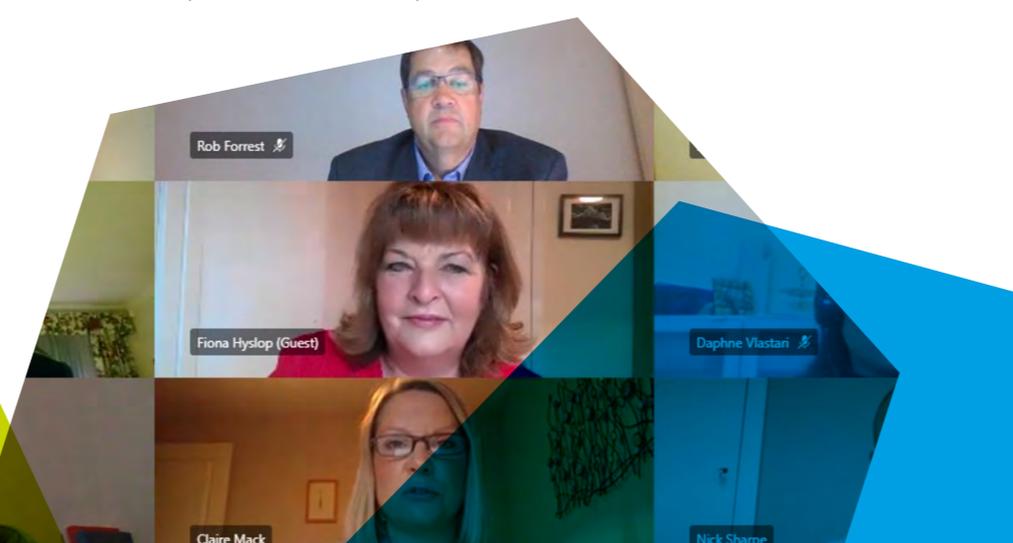
- Investment in Talent Workstream

Climate Emergency Response Group

DPEA Stakeholder Forum
(Scottish Government)

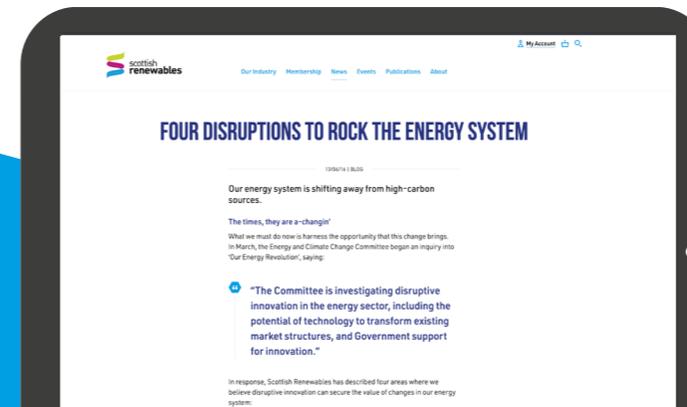
National Peatland Group
(NatureScot)

Eskdalemuir Working Group
(Scottish Government)



DIGITAL

- Launched a new website to provide a cleaner and more intuitive experience for members, event delegates and those requiring information about our sector. The mobile-first site was designed from the ground up to provide an easy-to-navigate portal to the information which matters, as well as better exposure for our event partners and members.
- Used the website refresh as a chance to develop a new member relationship management database for use by the Scottish Renewables team, linked to our email software, allowing members' preferences to be reflected instantly and team members to access the latest information on our 260 member companies.
- Continued to develop our blog platform, posting 23 times in the past 12 months and providing analysis and thought leadership on topics such as Brexit, the energy transition and coronavirus.
- Increased our following on LinkedIn by 78% over the past 12 months, to 10,800, following an effort to focus more attention on the platform. Twitter following increased by 8% in the same period, to 19,700.



MEDIA

- Used our new website to publish Scottish Renewables media responses for the first time, showing how we support and defend our industry to journalists and use our reach to amplify industry messages.
- Worked with journalists across all media platforms to provide accurate, crisp and referenced copy and data.
- Responded to 170 media enquiries – 10% more than in the previous 12 months– ranging from how COVID-19 is affecting the industry to the challenges and opportunities posed by increasing electricity generation capacity to reach net-zero by 2045.
- Issued almost 40 press releases and proactive statements to local, national, international and trade media on a range of topics affecting every part of the renewable energy industry.
- Supported our members and amplified their messages both on social media and through our Daily and Monthly Briefing emails, which go to more than 4,000 people every month, telling good news stories and setting out the positive case for the continued development of our industry.
- Provided media advice and coordinated media coverage for member companies around announcements, helping them to secure coverage from journalists across all platforms.
- Maintained our high-profile media presence throughout the year with regular contributions to outlets such as the BBC and STV, Herald, Scotsman and The Times, as well as trade publications including Renew, Energy Voice and Envirotec. Scottish Renewables also achieved media coverage in diverse, non-mainstream publications including Construction News, The Irish Times and Scottish Housing News.

CONFERENCES, DINNERS AND AWARDS CEREMONIES

In 2020, coronavirus changed the world. While our policy and communications work continued throughout coronavirus, we made enormous advances in the delivery of events at a time when in-person just wasn't possible.

In May our Hydro Conference became our first policy conference to be held online and was delivered to 50% more delegates than usual.

Since May we have held our Onshore Wind Conference, Annual Conference, Low-Carbon Heat Conference and the Young Professionals Green Energy Awards, all online.

We are committed to delivering the same rich experience with our virtual events that delegates have come to expect and will continue to learn and improve our online events until we can meet again in-person.

Scottish Renewables is committed to achieving equal gender representation in our event programmes. From October 19 - September 20 we saw the proportion of female speakers at our events rise for the second year, from 33.8% to 37%. We will continue to work on this throughout 2020 - 2021 and increase engagement.

WE UNDERWENT A RAPID PERIOD OF RESKILLING ON NEW TECHNOLOGY PLATFORMS AND WERE DELIGHTED BY THE RESPONSE OF AUDIENCES AND SPONSORS WHO WERE SO SUPPORTIVE OF OUR SHIFT TO A VIRTUAL ENVIRONMENT

CONFERENCES, DINNERS AND AWARD CEREMONIES

Floating Offshore Wind UK

(co-organised with RenewableUK)
31 October 2019, Aberdeen

The Scottish Green Energy Awards

5 December 2019, Edinburgh

Offshore Wind Conference, Exhibition & Dinner

28 & 29 January 2020, Glasgow

Transport Conference

19 February 2020, Glasgow

Hydro Conference

28 May 2020, Online

Young Professionals Green Energy Awards

15-19 June 2020, Online

Onshore Wind Conference

5-6 August 2020, Online

Annual Conference

1-3 September 2020, Online

Low-Carbon Heat Conference

24 September 2020, Online

MEMBER EVENTS

COVID-19 and Renewable Energy in Scotland

21 May 2020, Online

The UN's Race to Zero campaign: a COP26 webinar with Nigel Topping

21 July 2020, Online

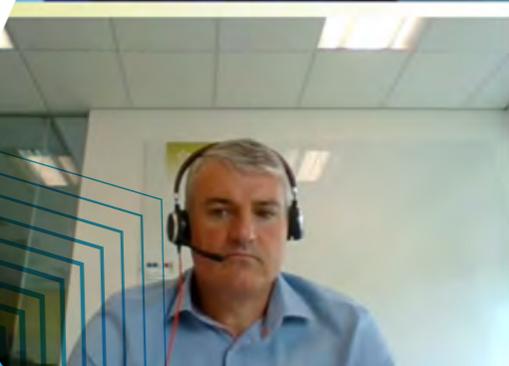
AGM & Members' Forum

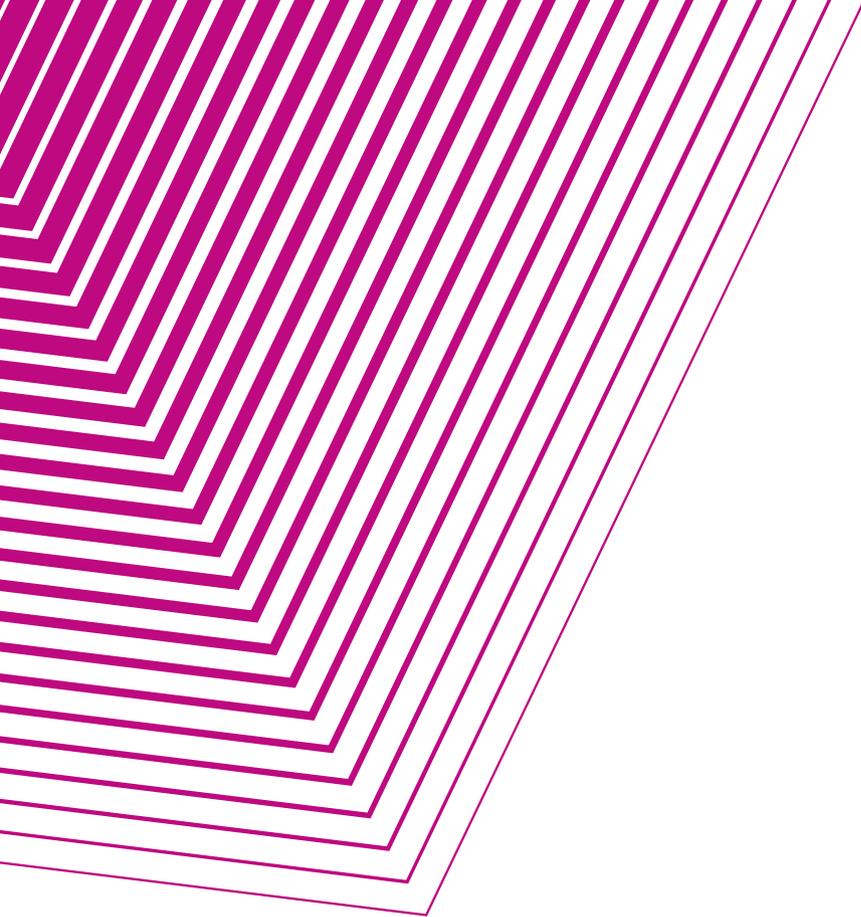
3 September 2020, Online

SEMINARS

Planning for Renewables

14 November 2019, Glasgow





scottish
renewables