



scottish
renewables

Presentation to AGM 2021

Claire Mack | Chief Executive

ENGAGING, PROMOTING and DEVELOPING Finance

2019/2020:

- Turnover slightly down from £1.28m to £1.23m
- Membership income increased by 4.5%
- Events income overall decrease of 15%
- Surplus transferred to reserves of £57,597

2020/21:

- Events delivery significantly impacted by COVID19 restrictions but virtual offer was strong; industry confidence flowing from ScotWind/ Onshore CfD re-instatement
- Very strong performance in Floating Offshore, GEA and Offshore
- Return to in-person events slower than anticipated due to further lockdown restrictions

ENGAGING, PROMOTING and DEVELOPING Services to Members

- Achieved our number one policy position when onshore wind and solar PV returned to the Contracts for Difference mechanism.
- 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.
- 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
- Worked extensively with members to respond to and influence the development of the Sectoral Marine Plan and Offshore Wind Policy Statement. The raising of the Scottish Government's 2030 ambition to 11GW was a welcome outcome of this work
- Commissioned a report along with RenewableUK which examined the cumulative impact of grid charging reforms to influence the regulatory policy in this area
- Our key recommendation for a Renewable Transition Training Fund to support more professionals to join our industry was delivered with 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.



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Presentation to Member Forum 2021

Claire Mack | Chief Executive

Morag Watson | Director of Policy

SUMMARY

- Campaigning for policies to deliver growth
- Telling our story
- Engaging, Promoting and Developing
- Looking ahead

DELIVERED WORK AROUND.....

- Climate Action Plan & Energy Strategy
- UK Government White Paper
- SMP, Offshore Wind Policy Statement and ScotWind Leasing Results
- CfD Auction Round 4
- National Planning Framework 4, Onshore Wind Policy Statement
- Grid and networks
- Brexit & Scottish Elections in May

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Proactive and reactive work across all technologies

In 2020-21 Scottish Renewables made the case for renewables in over 30 consultation responses, submissions to calls for evidence and letters to Ministers to influence government policy and regulation

We also published research and briefings across more than 15 key areas of member interest including Planning and NPF4, the value of Onshore Wind economically and in supporting well managed peatland, Offshore Wind Supply Chain impact as well as the wider economic impacts of our industry in rural areas and across the economy, Pumped Storage Hydro and it's benefits to the grid and consumers

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Economics and Markets

Supplier Default under the RO – A key issue that has evolved over the year that has exposed structural problems with the way the scheme operates leaving member open to liability

FiT replacement generation equipment – Support for more flexibility to smaller-scale members involved in the FiT scheme who might see change capacity levels as a result

Net Zero Electricity System – Argued for a system that takes a coordinated approach to reaching net zero as well as highlighting the importance of revenue stabilisation and good policy making in achieving the ambition

CfD Supply Chain Plans & Contract Changes – Ensured that the specific opportunities around the floating in Scotland were acknowledged, transmission charging issues were highlighted and that a wider view be taken on addressing supply chain growth

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Grid, Systems and Storage

ESO Future Operator – welcoming the creation of an independent but publicly funded model that will perform an enhanced role and provide the functions needed to forecast and analyse a renewable-based electricity system

Charging – Network Access and Forward Looking Charging Review/ TNUoS key areas of focus across the year and pinpointing the issues with the current system which are introducing regulatory uncertainty and price volatility into the system

RIO2 Draft Determinations – commented in detail on the policy changes and re-opener processes proposed to ensure that the next regulatory period supports our journey to a renewables-led, net zero electricity system

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Onshore Renewables

Sustainable Development – worked swiftly to ensure that the removal of sustainable development presumption in favour in planning was reversed

Eskdalemuir – Active contribution to and support for the work of the Eskdalemuir Working Group with a view to freeing up greater development opportunities for onshore wind in the area

Giving more; Peatland Restoration – Ensured that the vital role the onshore wind sector plays in managing and restoring peatland is recognised as part of the many wider benefits the industry delivers

Long Duration Storage – Made the case for the role of long duration storage to support the future development of Pumped Storage Hydro as an essential system tool

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Offshore Renewables

National Marine Plan Review – Undertook extensive work with Renewable UK to ensure that climate change and the role of offshore wind was recognised through the Plan and to ensure that any future changes are cognisant of the need for us to deploy quickly and at scale

CfD Supply Chain Plans & Contract Changes – We argued strongly against the introduction of CfD changes to Supply Chain Plan assessment meaning contracts could be terminated at a late stage, and urged alignment with the ScotWind Supply Chain Development Statement (SCDS) process

ScotWind Review – Worked closely with Crown Estate Scotland and the Scottish Government to underline the importance of a swift review to ensure the ScotWind process stayed on track

SOWEC Barriers to Deployment Group – Developed a work plan for the Environmental Sub-Group including the development and publication of key papers to push the debate forward

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

Low-Carbon Heat

BEIS Inquiry – Submitted a response focusing on the importance of a successor scheme to the Non-Domestic Renewable Heat Incentive, the extension of the Green Heat Networks Fund and more work to be done to develop the technologies needed to deliver renewable heat

Heat in Buildings Strategy – Impressed the importance of moving at pace to deliver decarbonised heat in homes across Scotland and called for greater clarity on the role of hydrogen and biomethane in heating

New Building Heat Standards – Argued clearly that all new homes consented are to have zero direct emissions heating and are highly energy efficient by 2024

Heat in wider Government Policy – Added detail to the debate on heat by offering a view for the first time on how much money should be allocated to multi-year programmes for heat decarbonisation for both the UK and Scottish Governments through their budget processes

TELLING OUR STORY

Campaigning

Supply Chain Impacts – Extended and broadened our Supply Chain Impact document to bring home the multiple socio-economic benefits that our industry creates here in Scotland. With projects like Neart na Gaoithe, Seagreen and Moray East and West under construction and Kincardine, the European Offshore Wind Deployment Centre in Aberdeen Bay, Beatrice and more generating power, the number of contracts awarded to businesses involved in sectors as diverse as TV production, safety and survival and weather forecasting grew in 2020/21, and will continue to do so.

Transmission Charging – created an accessible campaign and clear ask of Ofgem and Government to address this critical issue for projects and our industry. Ofgem then opened a consultation on reform and work continues to illustrate just how damaging to consumers and net zero these charges are.

COP26 – Delivered a year long campaign highlighting the benefits that our projects bring on the ground not just to people and communities but to combatting climate change. Key messages based on our unparalleled skills and expertise to support the rest of the world on their decarbonisation journey peaked when the COP26 event was held in Glasgow in November.

TELLING OUR STORY

Media

- **Comment** - worked with journalists to provide accurate, referenced data and comment in response to 120 media enquiries.
- **Range** – provided expert commentary on issues including the Energy White Paper, offshore wind and transmission charging, the Sixth Carbon Budget and new Hydrogen policy frameworks
- **Reach** – appearances on BBC and STV broadcast news, in publications including The Times, The Herald, The Guardian, reNews, Yahoo News and more.
- **Proactive media** – created almost 70 press releases and proactive statements for local, national, international and trade media on a range of topics including new economic data on the value of the industry, the popularity of turbines as the stars of social media and public attitudes towards them and highlighting the impacts of delays to the ScotWind process.

TELLING OUR STORY

Digital

- Supply chain focus – to coincide with the appointment of our Energy Transition and Supply Chain Manager, we created a ‘Supply chain’ section in our Daily Briefing and Monthly Briefing emails to notify members of industry updates and our ongoing work to ensure renewable energy is at the heart of the energy transition.
- MSP Hub – we created a new MSP section on our website which hosts a ‘Welcome Pack’ of resources covering all renewable energy technologies to support MSP engagement in debates on renewable energy.
- Expanded careers coverage on Scottish Renewables website – we have added a ‘Starting in Renewables’ and ‘Transition to Renewables’ page to the careers section which hosts information to support individuals looking to enter the sector.

TELLING OUR STORY

Digital

- Social media following increases – twitter followers up 10.5 % year on year, and on LinkedIn we have seen a 47.6% year on year increase as a result of focusing on developing our presence and creating regular content on the platform.
- Blog series – Scottish Renewables' popular blog series continues with 153 postings to date (15 in the past 12 months). Topics include a series on COP26; how Scottish whiskey's fuelling the energy transition; the alluring opportunity wind presents for Scotland's supply chain and how renewable energy is democratising access to Scotland's outdoors during lockdown.

TELLING OUR STORY

Publications

- **Supporting offshore wind** - worked with members to update and enhance our publication highlighting economic benefits to the Scottish supply chain from our growing offshore wind sector.
- **Recognising economic impacts across all areas of Scotland** – produced an easily-accessible geographic studies of the key projects and economic benefits delivered by renewables projects to show the impact of wind and hydro projects, gaining new media coverage and stakeholder engagement.
- **Year of COP campaign and Rural Roadshows** – delivered a year long campaign to highlight and celebrate the benefits of our renewables projects to the fight against climate change and to gather support in the areas where these projects are situated

TELLING OUR STORY

Events

- **Events** – 15 events in 2020/21 spanning the technologies that Scottish Renewables represents.
- **Attendance** – Scottish Renewables' events in 2020/21 were attended by more than 3,850 delegates, with most people who offered feedback finding the event informative and ranking the event either good or excellent.
- **Flex** – shifted to a blend of virtual events and a return to in-person events to make sure delegates got the same rich experience but with safety as a priority.
- **External profile** - worked with external organisations including the United Nations Climate Change Conference 2021 which saw SR CEO Claire Mack invited to become a Friend of COP.
- **Tackling topical issues** - continued to respond to a rapidly-changing policy environment, running seminars looking at hydrogen's place in the energy system and a planning system for net-zero.
- **Diverse** – we've continued to deliver on a commitment to increase gender diversity at our events. From October 2020 to September 2021 we saw the proportion of female speakers at our events rise for the third year, from 37% to 42.8%.

TELLING OUR STORY

SR Year of COP

- **SR COP26 Conference, 25 February** – the event was attended by 400 delegates who heard from 16 expert speakers. 92% of those providing feedback thought the content was excellent or good.
- **Roadshow, August, September, October** – the roadshow delivered 3 networking receptions for industry and local stakeholders and 3 public facing events engaging directly with the public explaining the importance of renewable energy projects in their region to the fight against climate change. The roadshow saw attendance from Maree Todd, Minister for Public Health at Nigg, Emma Harper MSP for South Scotland at Dumfries and John Swinney MSP, Deputy First Minister and Cabinet Secretary for Covid Recovery (delivered a keynote address in Dumfries). Various councillors also attended our public facing events and receptions.
- **COP26 Reception, 4 November** – attended by around 150 delegates, this event brought together Ministers, MP's, MSP's and representatives of foreign governments to meet with our members. The event was attended by 3 MPs, 2 ScotGov Ministers, (Richard Lochhead, Minister for Just Transition Employment and Fair Work and Patrick Harvie, Minister for Zero Carbon Buildings, Active Travel and Tenants Rights) and 7 MSP's.

TELLING OUR STORY

SR Year of COP

- **Beyond COP: Next Steps for Scotland's Clean Energy Revolution Publication** - outlines future steps The Scottish Government should take to deliver a lasting legacy for the energy transition.
- **Directory** – the Directory was rebranded for SR's Year of COP with promotion through social media and mailings across the SR database. Over an 8 week period the Directory saw 150 link clicks.
- **Top Blog** – SR's Year of COP delivered 5 Blogs with [Countdown to COP](#) standing out as the most well-read with 140 page views.
- **M8 advertising** - over a normal 2 week period the site would get 324,000 views. Although not official, COP figures are expected to be 30% higher at 421,200



TELLING OUR STORY

SR Year of COP

- Top three **#SRCOP26** Tweets

Later today our Year of COP Renewable Energy Roadshow visits Nigg on the Cromarty Firth. Our EV is on its way north now [@Worley_ECR](#) [@saserenewables](#) [@KensaContracts](#) [@edfenergy](#) [@CrownEstateScot](#) [@The_Banks_Group](#) [@SSEEnergySols](#) [#SRCOP26](#) [@ChargePlaceScot](#)



6474 impressions
107 engagements



Great to have [@JohnSwinney](#), Deputy First Minister, along to our final Year of COP roadshow in sunny Pitlochry to discuss how local communities can get involved in our net-zero journey. [#SRCOP26](#)



5302 impressions
172 engagements



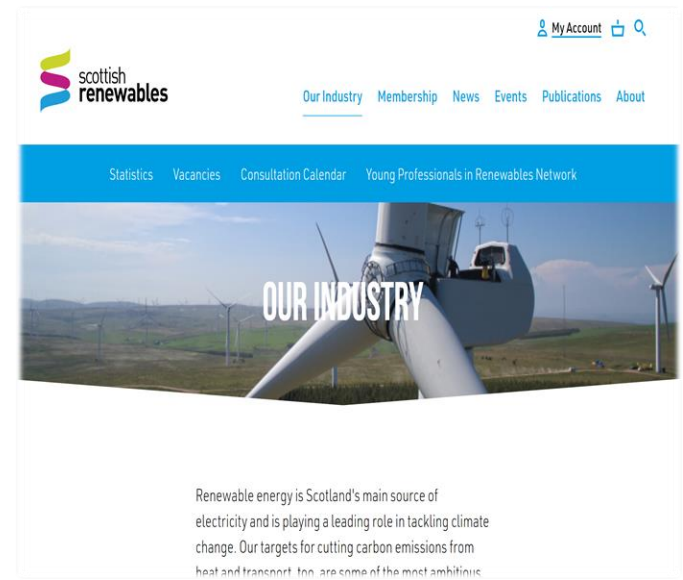
Great to have [@MareeToddMSP](#), Scottish Government Minister and local MSP, join us to discuss the benefits of renewable energy for the Scottish Highlands at our Year of Cop Renewable Energy Roadshow today in Nigg. [#SRCOP26](#)



5005 impressions
149 engagements

ENGAGING, PROMOTING and DEVELOPING Services to Members


- Briefing documents on key topics of importance to members
- Focus on Supply Chain development and impacts to support our relationship with UK and Scottish Government
- Growing the team to enhance our policy resource



LOOKING AHEAD.....

- Energy Strategy Refresh
- ScotWind Leasing Results
- CfD Auction Round 4
- NPF4 Published
- Further debate on Transmission Charges and grid reform

Q & A

The slide features a white background with the text 'Q & A' centered in a dark blue, sans-serif font. On the left side, there are overlapping geometric shapes in shades of blue, green, and yellow, along with several thin, parallel yellow lines that create a sense of depth and movement. On the right side, there are overlapping geometric shapes in shades of blue and purple, also with thin, parallel purple lines, mirroring the design on the left.