



scottish
renewables

ANNUAL REVIEW 2020-21



Regulatory reform, too, was of enormous interest to members, with the Transmission Network Use of System charging regime desperate for review. We worked with members to engage Parliamentarians and Ofgem, the regulator, on this issue – work which led to the announcement of a Call for Evidence at the very end of our membership year.

Heat continues to be a busy area for Scottish Renewables, with the Heat Networks (Scotland) Act finally passing in February, and much to do to ensure we make the most of was opportunity which this legislation provides.

The energy transition, too, has meant changes for the organisation, with a new role of Energy Transition and Supply Chain Manager created. Hopefully those of you in that area will now have had a chance to meet Emma and discuss what’s needed to ensure Scotland makes the most of the opportunities provided by net-zero.

Finally, our events programme has continued to adapt and shift as the Covid pandemic changed. Two award ceremonies – The Young Professionals Green Energy Awards and The Scottish Green Energy Awards – were held virtually, while our first in-person event – Floating Offshore Wind 2021 – took place in Aberdeen. Again, find out more about the range of events we’ve held in another bumper membership year later in this Annual Review. With so much happening in 2021-22 already, rest assured that the Scottish Renewables team is there for you every step of the way. Get in touch if we can help your business succeed in the coming 12 months.

Claire Mack, Chief Executive



Welcome to our new-look Annual Review, which presents some of the highlights of membership year 2020-21. Of course, we already tell you about our work in detail through the Monthly Briefing email, and you can easily access all those using the QR codes at the end of this document.

In our 2020-21 membership year, and outside the COP bubble, the Scottish Renewables team’s days have been busier than ever, working hard on behalf of all our members, large and small, and on technologies from the mature to the innovative. We continued to keep up the pressure on the issues which matter to our members, too – key among those being the planning system. With reform delayed because of the coronavirus pandemic, we carried out new research which showed a staffing crisis in Scotland’s planning departments, as well as meeting regularly with The Scottish Government to raise our concerns.



The policy team have been busier than ever with the challenge of achieving the levels of renewables deployment and heat decarbonisation net-zero requires coming into ever sharper focus.

Ensuring a supportive policy environment in which you, our members, can continue to grow your businesses and cement Scotland’s place as a world leader in renewable energy continues to be our top priority.

Offshore, the ScotWind Leasing round has been at the forefront of many minds, with the review process adding an unexpected twist in Scotland’s offshore wind journey. Supply chain also continued to be a key area of focus, with action on multiple fronts including within the ScotWind and CfD processes.

In onshore, with the reopening of CfD Pot 1, planning continued to dominate as the NPF4 process rumbles on. As a central concern for you, our members, we kept up our work by ensuring our new MSPs understood the vital importance of a supportive planning system for achieving net-zero and ensuring we also achieve the levels of deployment we need.

We continue to be as tenacious as ever in the face of the perennial challenges presented by grid issues and are also finally starting to see real progress on heat policy (plus hydrogen) with both issues moving rapidly up the agenda. As the next big horizon in our decarbonisation journey, the electrification of heat and green hydrogen production presents opportunities across our membership.

Morag Watson, Director of Policy



Working in this industry, in Glasgow, in 2021, meant one issue was never far from my inbox: COP26.

To you, our members, invested as you are in the future of the planet and the policies which will protect it for future generations, there has never been a brighter spotlight than that shone by the build-up to Scotland’s most prestigious event.

With the world’s attention turning to Clydeside, we devised Scottish Renewables’ Year of COP - a programme of activity which focused attention on the renewable energy industry in Scotland like never before. But more on that on pages XX of this Annual Review.

May’s Scottish Parliament election provided us with the opportunity to reflect on what Scotland’s politicians must deliver for the renewable energy industry in Scotland.

With the election’s result came 42 new MSPs, and a far-reaching programme of meetings and events saw us engage with almost half of those new members face-to-face. You can read more detail about that process in this document.

Finally, I’d like to mention the growth of our presence on social media, and the part our members play in that. As you’ll see on page eight, LinkedIn numbers are up 47.6% year-on-year, with twitter up 10.5%.

By engaging with our posts you help us target decisionmakers with the messages that matter, and I would urge you to do so as freely and as often as you can in future.

Nick Sharpe, Director of Communications and Strategy

CAMPAIGNING FOR POLICIES TO DELIVER GROWTH

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 the wider economic impacts of our industry in rural areas and across the economy and pumped storage hydro and its benefits to the grid and consumers.

The following pages present highlights from our campaigning policy work across our member Forums.

ECONOMICS AND MARKETS

Net-zero electricity system – Argued for the evolution of our electricity system where a co-ordinated approach is taken to reaching net-zero through renewables-dominated generation, as well as highlighting the importance of revenue stabilisation and good policy making in achieving the level of renewables deployment needed.

CfD Supply Chain Plans and contract changes – SR acted quickly to ensure that the specific opportunities around floating wind in Scotland were acknowledged, transmission charging issues were highlighted and that a wider view was taken on addressing supply chain growth within the CfD Supply Chain Plans and contract changes mechanism.



GRID & SYSTEMS

Storage success – Many years of work to create a route to market for long-duration storage, including, of course, pumped storage hydropower, came to fruition in 2021, with a report commissioned alongside members and meetings with senior staff resulting in a call for evidence on the issue.

ESO Future System Operator – Pushed for the creation of an independent but publicly-funded model and advocated that the FSO should perform an enhanced role, providing the functions needed to forecast and analyse a renewables-based electricity system and proactively plan a grid fit for net-zero.

Charging – Kept up the pressure on the Access and Forward-looking Charges Significant Code Review and on Transmission Network Use of System Charging, producing an explainer setting out the issues in detail and delivering a coordinated public affairs campaign to push the UK Government and Ofgem to reform grid charging and create a charging regime fit for net-zero.

RII02 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.

ONSHORE RENEWABLES

Feed-in Tariff replacement generation equipment – Positive news in response to Scottish Renewables' policy position as Ofgem announced its decision to allow generators to replace and temporarily remove generating equipment and retain an installation's accreditation. Ofgem also confirmed that modifications to the total capacity installed may also go ahead in certain circumstances.

Net-zero electricity system – Argued for the evolution of our electricity system where a coordinated approach is taken to reaching net-zero through renewables-dominated generation, as well as highlighting the importance of revenue stabilisation and good policy making in achieving the level of renewables deployment needed.

Maintaining important relationships – Continued dialogue with members of the Scottish Government's Wind Energy Policy and Development Energy team and Climate Change Directorate to discuss aviation lighting issues, progress on Eskdalemuir, NPF4, peatlands and securing positive effects for biodiversity.



OFFSHORE RENEWABLES

National Marine Plan Review – Undertook extensive work with RenewableUK 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 changes to Supply Chain Plan assessments in the Contracts for Difference mechanism, meaning contracts could be terminated at a late stage, and urged alignment with the ScotWind Supply Chain Development Statement process.

ScotWind review – When unprecedented market shifts halted the ScotWind Leasing process, Scottish Renewables' Policy and Communications teams worked hard to keep a challenging review process on track, collating industry feedback and managing relationships. Our work for and with the sector paid off, with the delay minimised and leasing back on track.

SOWEC Barriers to Deployment Group – Developed a work plan for the Environmental Sub-Group of the Scottish Offshore Wind Energy Council, including the development and publication of key papers to push the debate forward.

LOW-CARBON HEAT

Promoting heat – 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 which government must do 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 Build Heat Standards – Argued clearly that all new homes which are consented in Scotland must have zero direct emissions heating and be 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 by both the UK and Scottish Governments through their budget processes.

TELLING OUR STORY

Green energy is at the heart of the national and global conversation about a net-zero future, with that focus shifting to Scotland in the year COP26 came to Glasgow. Scottish Renewables strives to reach a diverse audience and works across sectors to publicise and educate. In what have continued to be testing pandemic times, we have adapted to be more creative with events and in communicating with our audience.

CAMPAIGNING

Measuring our success – We commissioned new work to understand the scale of our sector - how many people work in renewables in Scotland, and the value of our contribution to the economy as a whole – for the first time, achieving widespread media interest.

Cabinet boost for energy - Our election manifesto set out the benefits of a Cabinet post focussing on energy and net-zero – an appointment which was confirmed by the First Minister. We then began work to build relationships with the new ministerial team on behalf of our members.

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. This document is set to become a staple of Scotland's growing offshore wind landscape.

Transmission charging – Created an accessible campaign and clear policy position to increase pressure on Ofgem and Government to address this critical issue for 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 were based around Scotland's 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

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 – 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 'Starting in Renewables' and 'Transition to Renewables' pages to the careers section of our website as a go-to resource to support individuals looking to enter the sector.

Social media following increases – Twitter followers are 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 whisky is fuelling the energy transition; the alluring opportunity wind presents for Scotland's supply chain and how renewable energy democratised access to Scotland's outdoors during lockdown.



in Follow 16,896

+10.5%

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 UK Government's 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 (up 75% year-on-year) 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.

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 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.

Promoting peatland – Produced an easily-digested publication, titled Wind Power and Peatland: Enhancing Unique Habitats, to highlight more than £2.5 million of work carried out by three renewable energy businesses at peatland sites across the country.



EVENTS

Scottish Renewables events are more than just a chance to hear from the people at the heart of our industry about the issues which matter - they're a place to connect and network, as well as a chance to step back from the daily grind and think strategically about the future direction of your business.

That's why we were delighted to start our live events back up following the tough times we've all been through during the pandemic - starting with **Floating Offshore Wind (Aberdeen)** and our **Low-Carbon Heat Conference (Glasgow)** in September.

Packed events calendar - 15 events in 2020/21 spanning the technologies which Scottish Renewables represents.

Attendance and popularity - Scottish Renewables' events in 2020/21 were attended by more than 3,850 delegates, with most people who offered feedback finding the events informative and ranking them either good or excellent.



Adding in flexibility - 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.

Raising our 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.

Focus on diversity - 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%.



MEMBERSHIP

Members are at the heart of what we do at Scottish Renewables. In 2020-21 we conducted a membership survey to ask our 260 member companies what they think about how we're doing, the future of the industry from their perspective and what we should be doing more (or less) of to help their organisations succeed.

If there's anything about our membership offering you'd like to discuss, we're always here to help - you can find all the contact details you'll need on the **Our Team** page of our website.

Acting on your input - We conducted a membership-wide survey and interview programme to help us gain a deeper understanding of our membership, receive feedback on the service we provide and to help us plan for the future.

Growing the team to enhance our policy resource - SR's Policy team has grown to a team of six, with more resource at senior level. In late 2020, the team introduced the Hydrogen Forum as a response to demand from members.

Enhancing the member benefits package on supply chain for existing and new supply chain members - This work will see SR support those looking to develop their business by helping them to identify key opportunities in the pipeline, providing insight on the renewables market and helping them showcase their capabilities and success.

Increasing interaction - Two new working groups have been introduced in addition to our existing Forum meetings. The Onshore Wind and Planning Working Groups will work with SR to develop our responses to the OWPS update and the draft NPF4 respectively.



scottishrenewables YEAR OF COP

With the United Nations' COP26 coming to Scotland, Scottish Renewables' Year of COP campaign showcased Scotland's role in the fight against climate change through a series of events, media and political work.

Our message was that through more than two decades of developing a renewable energy system which provides the equivalent of almost all of the country's electricity we've developed the skills, technologies and knowledge which the rest of the world will need as it follows our lead. These pages showcase some of the highlights of Scottish Renewables' Year of COP, which ran throughout 2021.



SR COP26 Conference – This event, in February 2021, was attended by 400 delegates who heard from 16 expert speakers. 92% of those providing feedback thought the content was excellent or good.

Renewable Energy Roadshow: August - October 2021 – The Roadshow delivered three networking receptions for industry and local stakeholders alongside three events engaging directly with the public which explained the importance of renewable energy projects in their region to the fight against climate change. Roadshow events were attended by 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, who delivered a keynote address in Pitlochry. Various local councillors also attended our public-facing events and receptions.

COP26 Reception – Attended by around 150 delegates, this event brought together Ministers, MPs, MSPs and representatives of foreign governments to meet with Scottish Renewables' members. The event was attended by three MPs, two Scottish Government 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 seven MSPs.

Beyond COP: Next Steps for Scotland's Clean Energy Revolution – This publication outlines future steps The Scottish Government should take to deliver a lasting legacy for the energy transition.

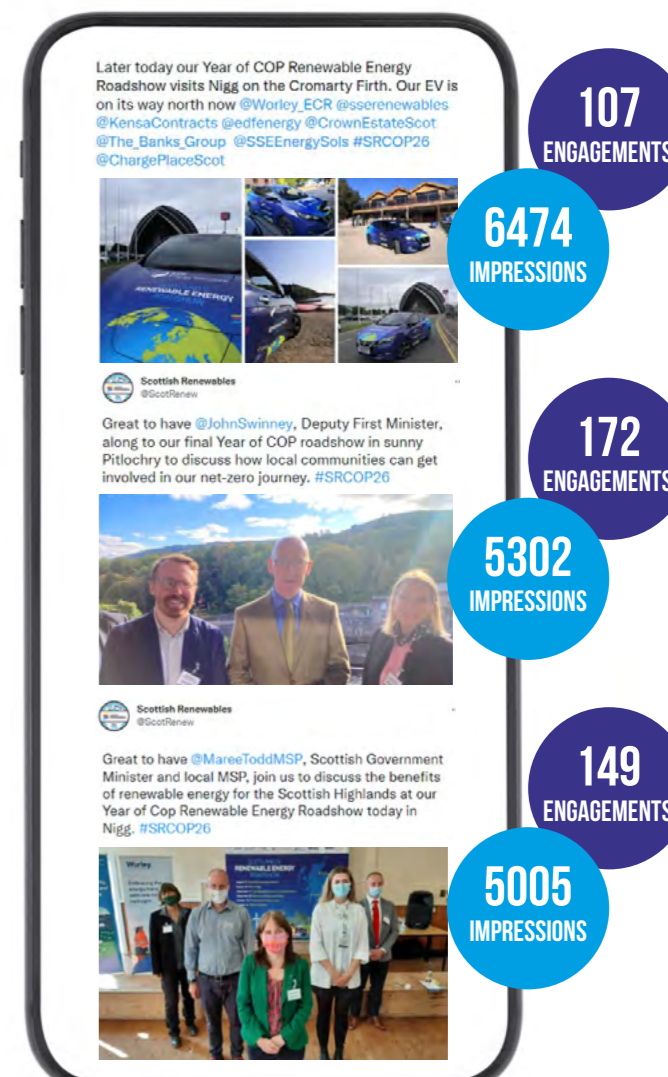
Rebranding our Directory – Scottish Renewables' membership Directory is a one-stop shop for anyone wanting to access Scotland's renewable energy industry. This easily-navigated, trusted gateway has operated for more than a decade and attracts around 1,000 views per month. In 2021 we rebranded the Directory to focus international attention on the products and services Scotland can offer as the world accelerates its drive to cut carbon.

Top blogs – SR's Year of COP delivered five blogs, with Countdown to COP standing out as the most well-read.

M8 advertising – Appearing alongside the route from Glasgow Airport to the COP26 venue, our digital advertising sign told delegates how Scotland's renewable energy industry was powering the country and inspiring the world. It is thought the advert would have been seen by more than 400,000 people during its two-week life.



OUR THREE TOP #SRCOP26 TWEETS



For more detail on everything in our Annual Review 2020-21 – and to see how our policy and communications work developed as the year progressed – you can read every one of our monthly briefing emails in the publications section of our website, or via the QR codes below.

OCTOBER 2020



NOVEMBER 2020



DECEMBER 2020



JANUARY 2021



FEBRUARY 2021



MARCH 2021



APRIL 2021



MAY 2021



JUNE 2021



JULY 2021



AUGUST 2021



SEPTEMBER 2021



Dear member,

Welcome to the first Monthly Briefing of 2021.

We begin the year amidst continued uncertainty, but with scope for optimism and for opportunities to be seized. Of those, COP is the most obvious, and we are working hard to ensure that the contribution Scotland can make to the global net-zero journey is visible and recognised.

This work, through a [new campaign](#) which we'll share in coming weeks, affords us and our industry leaders the chance to tell our story and use our leadership capabilities to take the real issues to both governments.

As ever, we're pushing Ministers to understand both the barriers and the enabling activity required to fulfil the world leadership role we all want to take. To that end, the SR Board Elections are currently active. Please follow the instructions in the email we'll be sending you next week and make your voice heard by using your vote as a member on January 29 to help shape the delivery of that leadership.

Claire Mack
Chief Executive
E: chiefexecutive@scottishrenewables.com



GENERAL



Fiona Hyslop Green Recovery Roundtable

Fiona Hyslop, [Scottish Government Cabinet Secretary for Economy, Fair Work and Culture](#), was treated to a whirlwind tour of Scotland's renewable energy industry by [Scottish Renewables](#) members at a roundtable event this week. The session, chaired by Claire Mack, placed renewable energy at the heart of the green economic recovery from coronavirus and heard from 13 members and the SR team on three themes: renewable heat, infrastructure projects and skills and export.

Ms Hyslop highlighted that The Scottish Government values its close association with Scottish Renewables and its members and our close and effective collaboration on addressing key issues.

You can read [all about the event in this blog](#), which looks at member contributions and the Cabinet Secretary's responses.

Fiona Hyslop @FionaHyslop · 1h
Good meeting with Scottish Renewables on opportunities and what we need practically and in policy to realise our renewable energy capability and tackle climate change

Scottish Renewables @ScotRenew · 6h
Today @FionaHyslop Cabinet Secretary for Economy, Fair Work and Culture met with SR members to discuss how @scotgov can continue to develop and enhance its partnership with the renewable energy industry and deliver its ambitions for a #GreenRecovery



PLANNING CONFERENCE

23 FEBRUARY 2022
GLASGOW

OFFSHORE WIND CONFERENCE

8 & 9 MARCH 2022
GLASGOW

NET-ZERO ENERGY CONFERENCE

22 & 23 MARCH 2022
EDINBURGH

YOUNG PROFESSIONALS GREEN ENERGY AWARDS™

28 APRIL 2022
GLASGOW

MARINE CONFERENCE

25 MAY 2022
EDINBURGH

LOW-CARBON HEAT CONFERENCE

JUNE 2022
GLASGOW

NET-ZERO ENERGY TRANSITION AWARDS

25 AUGUST 2022
ABERDEEN

ONSHORE WIND CONFERENCE

SEPTEMBER 2022

THE SCOTTISH GREEN ENERGY AWARDS™

01 DECEMBER 2022
EDINBURGH