



ONSHORE WIND CONFERENCE 2022

7 SEPTEMBER 2022 GLASGOW

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Claire Mack
Chief Executive
Scottish Renewables

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Màiri McAllan MSP

Minister for Environment and
Land Reform

The Scottish Government

A1 - Onshore wind - daring to be a force of nature

Chaired by: Claire Mack
Chief Executive, Scottish Renewables

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Stream A

Claire Mack

Chief Executive, Scottish Renewables

Amy Keast

Onshore Wind Policy Manager, The Scottish Government

Kate Turner

Director of Policy and Regulation, ScottishPower Renewables

Jim Brown

Director, Energy Skills Partnership

Derek Hastings

Head of Onshore Projects, SSE Renewables



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A2 - Onshore wind's route to market



Morag Watson
Director of Policy
Scottish Renewables



Neil Marshall

Advisory Lead - Onshore Wind
Natural Power

Onshore wind route to market - PPAs

Neil Marshall, Advisory Lead – Onshore Wind

Date: 07.09.2022



Planning & environment

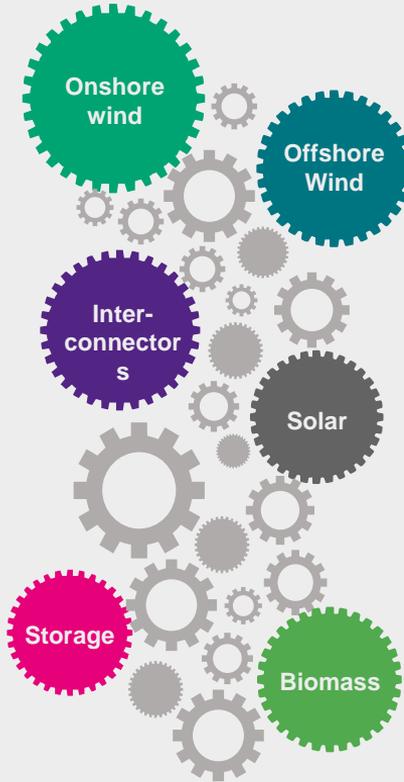
- Environmental Impact Assessments
- Collision modeling
- Smart bat curtailment
- Development consulting
- Environmental and social governance monitoring

Construction

- Design optimization
- Pre-construction advisory
- Owner's engineer / Independent engineer
- Advisory during negotiation, tendering
- Geotechnical consulting

Technical due diligence

- Technical advisory in acquisition or sale of projects, portfolios, platforms
- Project finance (Lender's technical advisor)
- Corporate PPA advisory



Energy yield analysis

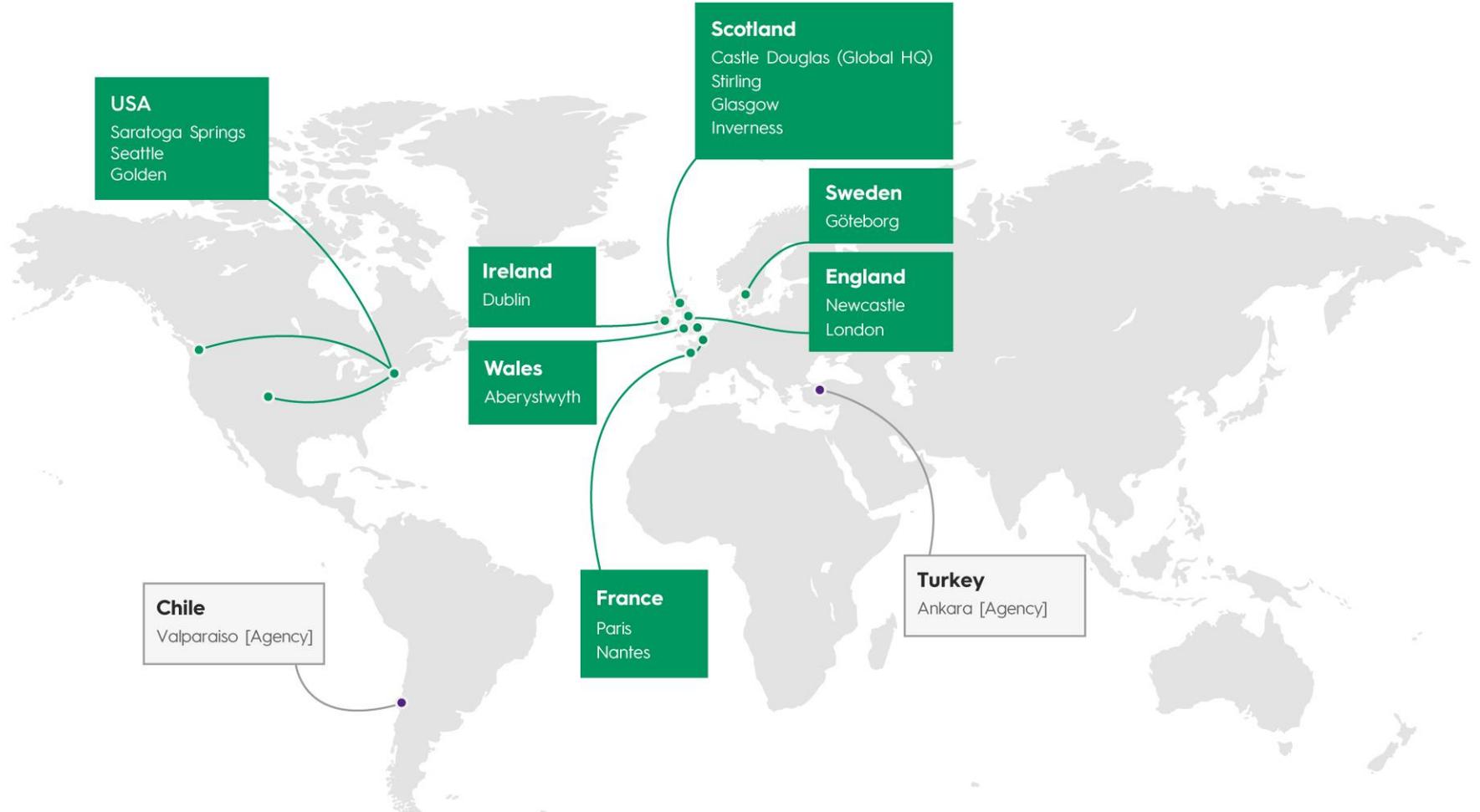
- Pre- and post- construction energy yield analysis
- Data management for met mast and lidar campaigns
- Monthly operational reporting

Operations

- Technical and commercial asset management, including ControlCentre
- Full servicing
- High tension switching
- Yaw alignment
- Predictive maintenance

Inspections

- Take-over
- Health checks
- End-of-warranty (full scope)
- Blade (Cornis, or with drones)



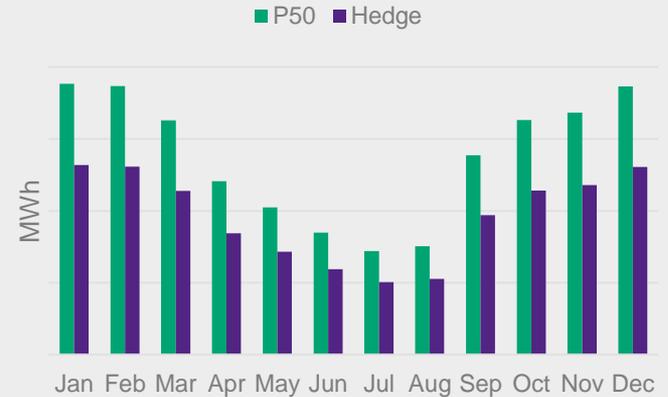
Natural Power Advisory - PPA experience

- All common PPA types
 - Fixed volume
 - Virtual
 - Pay as produced
- Network Rail PPA support
- Several TWh of Nordic PPAs



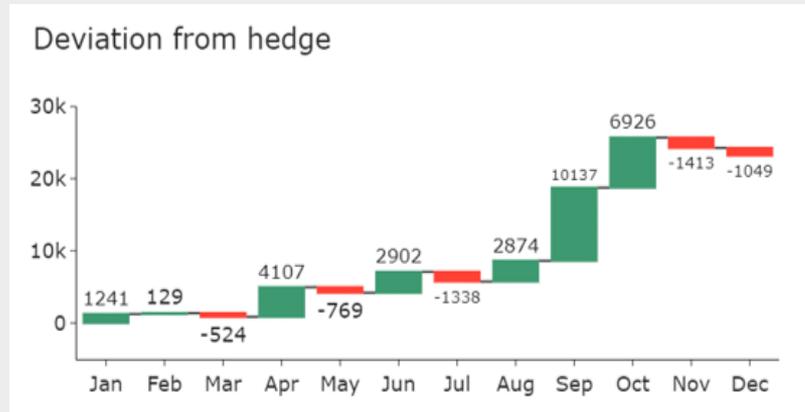
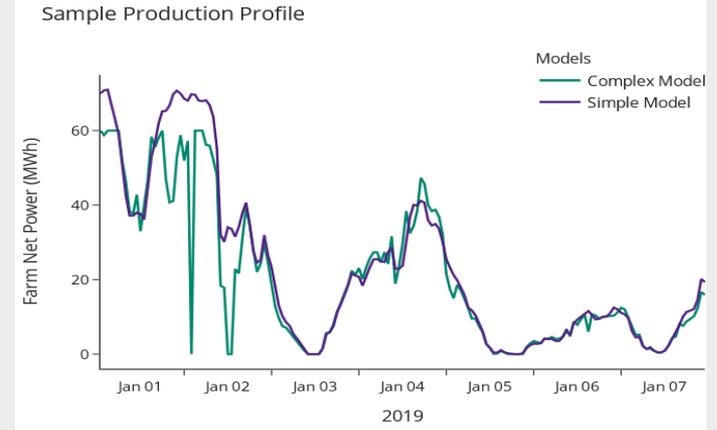
The 'Nordic model'

- Up to 70% of P50 to be delivered according to production profile
- Relatively low fixed prices
- Shortfalls bought at spot price, hourly settlement...



Lessons learned for UK?

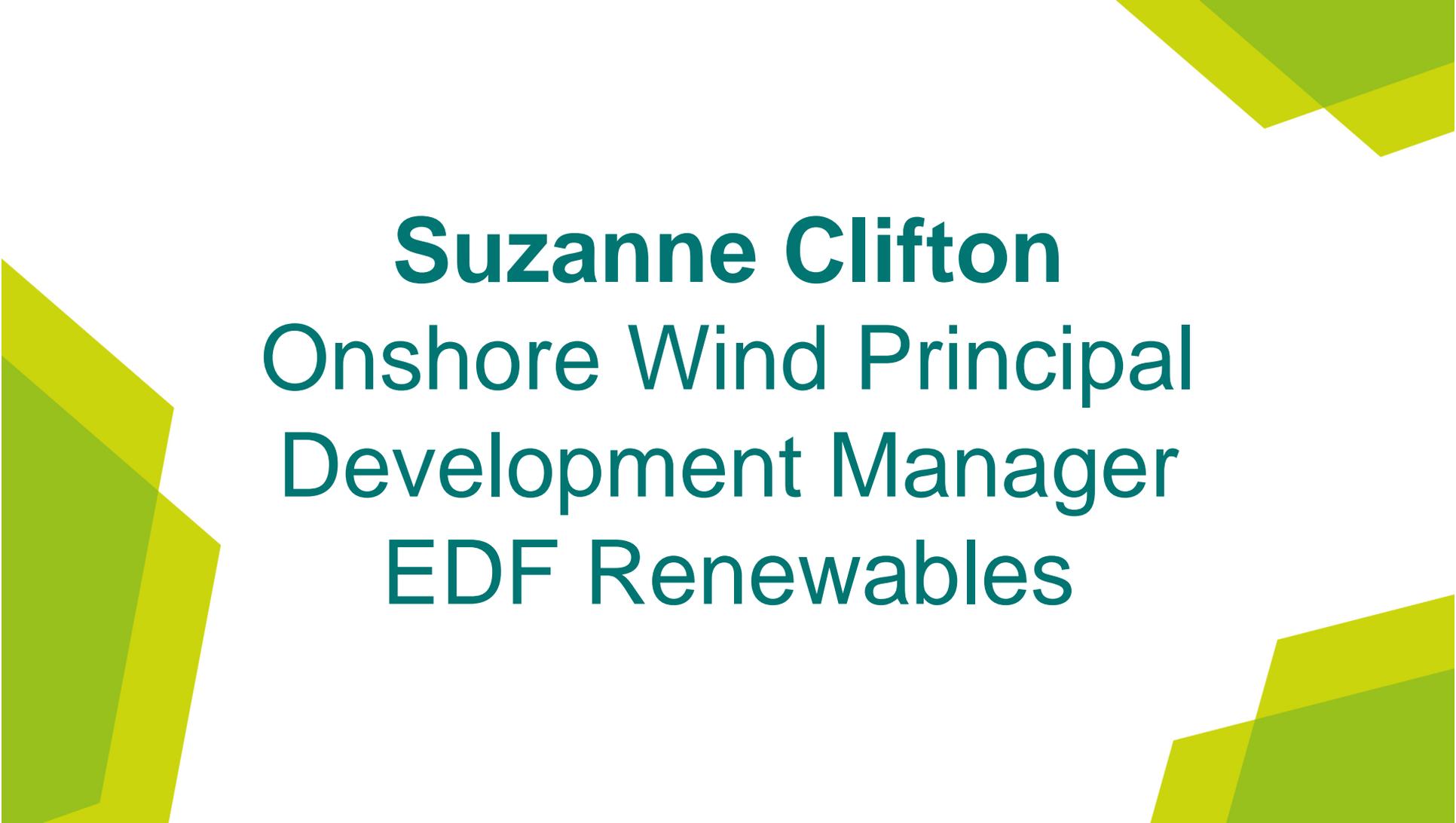
- Fixed volume / baseload still popular with offtakers
- Time series yield modelling
 - Time varying losses
 - Stochastic availability
- More representative modelling of real wind farm operation



Thank you

neilm@naturalpower.com





Suzanne Clifton
Onshore Wind Principal
Development Manager
EDF Renewables



- Onshore Wind's
- Route to Market

Suzanne Clifton

Principal Business Development Manager





At EDF Renewables UK and Ireland our goal is to combat climate change - we're passionate about creating a net zero future where clean energy powers our lives.

- 34 operational onshore windfarms made up of 368 turbines
- 1.2GW of projects in Scotland in planning and development with plans for further growth
- A target of 500MW of onshore wind in Wales by 2030
- EDF has multiple technologies with offshore, solar and battery storage projects operational alongside our onshore wind sites



My focus is bringing projects through from consent to financial investment decision



Project Name	Region	Applicant	Technology Type	Size (MW)	Strike Price (£/MWh)	Delivery Year	No. of Phases	Pot
Redcar Holdings Limited	England	REDCAR HOLDINGS LIMITED	Energy from Waste (with CHP)	30.00	45.99	2024/25	1	1
Cumberhead West	Scotland	CUMBERHEAD WEST WIND FARM LTD	Onshore Wind (>5MW)	119.70	42.47	2024/25	1	1
Arecleoch Wind Farm Extension	Scotland	SCOTTISHPOWER RENEWABLES (UK) LIMITED	Onshore Wind (>5MW)	74.10	42.47	2024/25	1	1
Kilgallioch windfarm extension	Scotland	SCOTTISHPOWER RENEWABLES (UK) LIMITED	Onshore Wind (>5MW)	51.30	42.47	2024/25	1	1
Stranoch Wind Farm	Scotland	STRANOCH WINDFARM LIMITED	Onshore Wind (>5MW)	99.96	42.47	2024/25	1	1
North Kyle Energy Project	Scotland	NORTH KYLE WIND FARM LIMITED	Onshore Wind (>5MW)	212.00	42.47	2024/25	1	1
Hagshaw Hill Repowering	Scotland	HAGSHAW HILL REPOWERING LTD	Onshore Wind (>5MW)	79.80	42.47	2024/25	1	1
Broken Cross Wind Farm	Scotland	BROKEN CROSS WIND FARM LIMITED	Onshore Wind (>5MW)	48.00	42.47	2024/25	1	1
Douglas West Extension	Scotland	DOUGLAS WEST EXTENSION LTD	Onshore Wind (>5MW)	71.50	42.47	2024/25	1	1
High Constellation Wind Farm	Scotland	HIGH CONSTELLATION WINDFARM LIMITED	Onshore Wind (>5MW)	50.00	42.47	2024/25	1	1
Chirmorie Wind Farm	Scotland	CHIRMORIE WIND FARM LIMITED	Onshore Wind (>5MW)	81.60	42.47	2024/25	1	1
Litchardon Solar Farm	England	ND SOLAR ENTERPRISES LTD	Solar PV (>5MW)	49.90	45.99	2024/25	1	1
Bishampton Solar PV	England	AURA POWER SOLAR UK 6 LTD	Solar PV (>5MW)	30.00	45.99	2024/25	1	1
Rag Lane Solar	England	RAG LANE SOLAR LIMITED	Solar PV (>5MW)	42.00	45.99	2024/25	1	1
Corner Copse	England	JBM SOLAR PROJECTS 1 LTD	Solar PV (>5MW)	49.90	45.99	2024/25	1	1



Stranoch Wind Farm
~100MW CfD

Reducing the CfD to a single pot risks increasing complexity reducing investment certainty



Barriers to Financial Investment Decision

It remains a delicate balance...

Uncertainty

Complexity

The CfD has delivered for the renewable industry as a whole. It has been successful because it reduces uncertainty and complexity encouraging investment

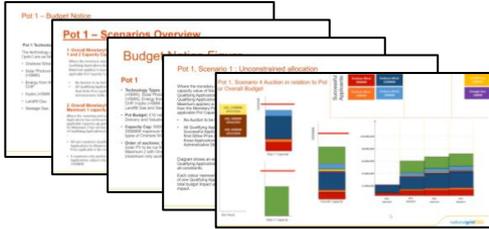
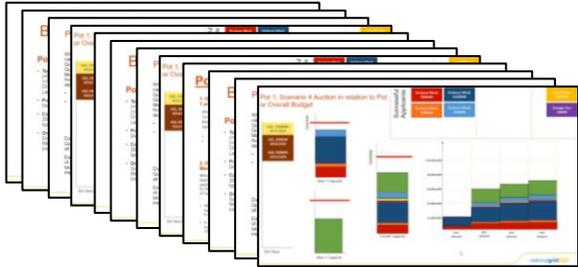
~~Single Pot~~



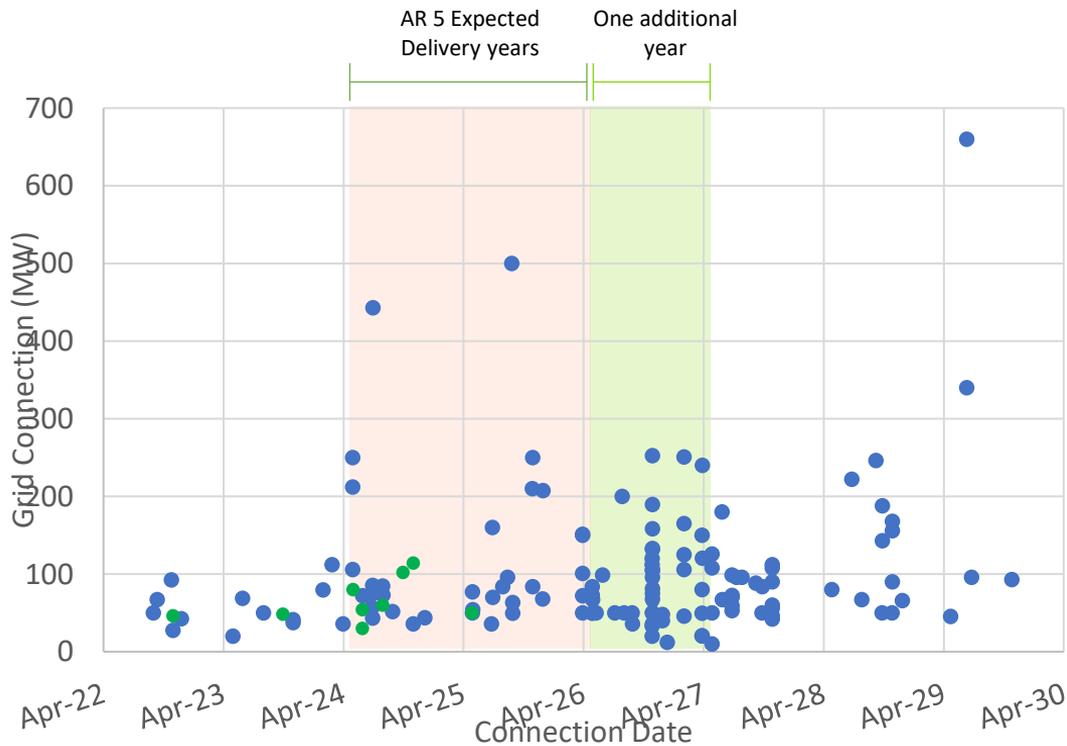
Pot 1

Pot 2

Pot 3



If AR5 were to include an additional third delivery year, this could unlock significant additional capacity

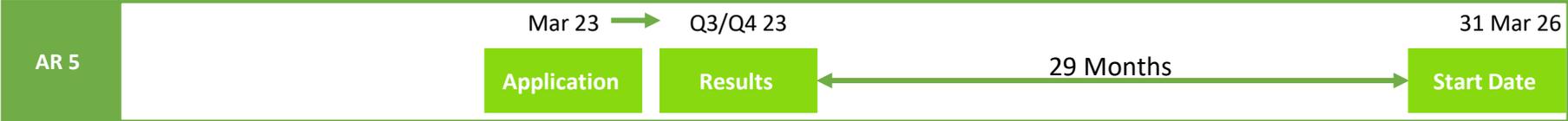
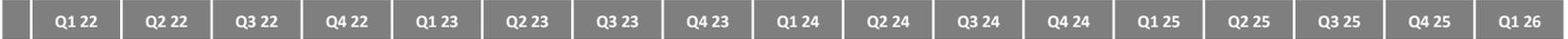


Connection Year (Apr-Mar)	Total MW	AR 4 Delivery Years	AR 5 Expected Delivery Years
22/23	326		
23/24	494	x	
24/25	2,073	x	x
25/26	2,110		x
26/27	4,398		?
27/28	2,255		
28/29	1,527		
29/30	1,234		

Construction timelines are tight for AR4 and are likely to be significantly tighter if delivery years remain as expected

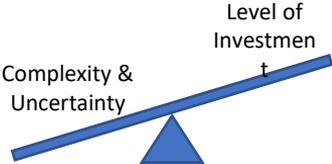


Applications for CfD opened 3 Dec 21 with approximately 7 months before the auction was held. For the latest grid connection date this provides 32 months to complete the project



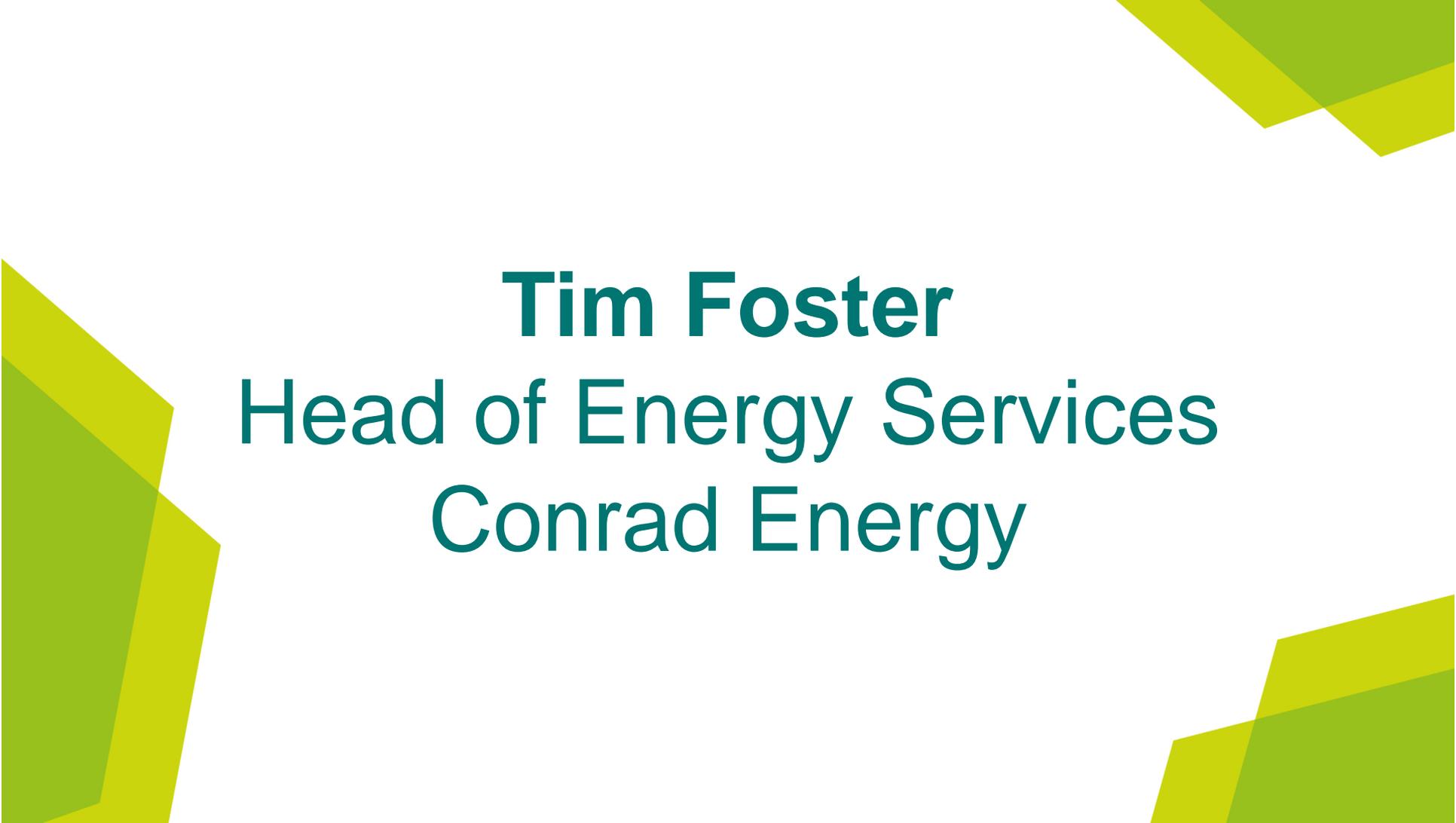
BEIS have suggested application will open in Mar 23, following the same timelines this would result in a 10% reduction in timing, this could further reduce if application start is delayed

The CfD is a mechanism for the future and will need to adapt, but at a steady pace to continue delivery renewable capacity



The CfD should provide a signal that there will always be a route to market available to a competitive project. This allows flexibility in decision making for developers allowing innovative options to be pursued with the safeguard of the CfD's certainty in reserve

The CfD can't remain static and must adapt as the energy market changes. However we must be aware of the delicate balance between too much regulatory change and bringing enough investment forward to meet Net Zero



Tim Foster
Head of Energy Services
Conrad Energy



Onshore Wind's Route to Market

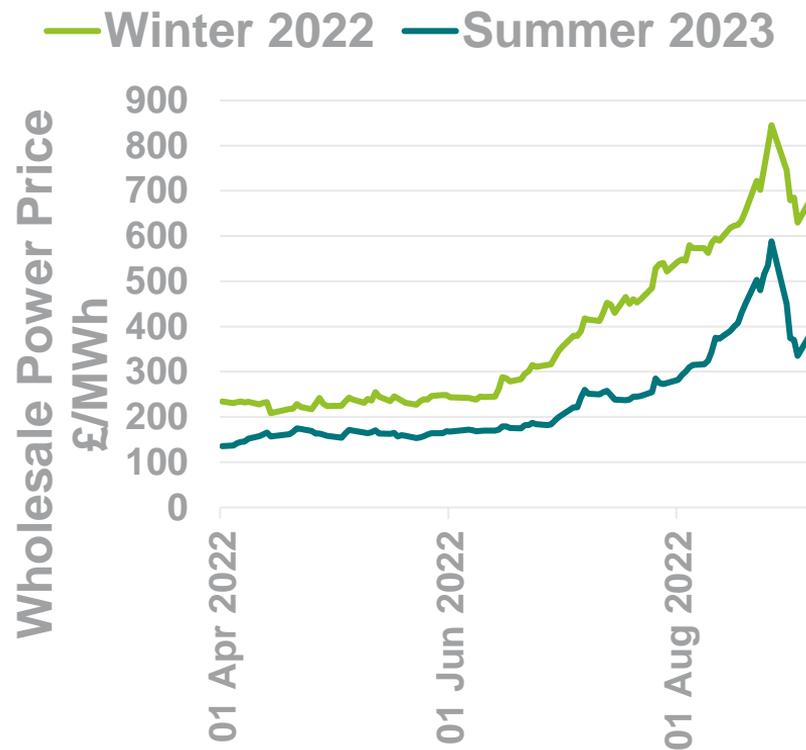


- We are the UK's largest flexible power producer with over 700MW of generation & storage assets across 50 plants and a development pipeline of 1GW+ portfolio made up of flexgen, storage, solar and hydrogen projects which will be delivered by 2025
- We develop, construct, own, operate and maintain generation & storage assets, employing over 150 people
- We have an in-house trading desk which trades & optimises our own assets and those of third parties
- We are a licenced electricity supplier and provide Power Purchase Agreements
- The business also provides behind the meter and private wire solutions to businesses



Power Purchase Agreements - Setting the Scene

- Power Purchase Agreements always require two willing participants:
 - a Seller
 - a Buyer
- Both have actual (or aspirational) requirements around volume, price and term with historic PPAs stuck in a period of relative market calm
- Fundamental change in energy markets:
 - What now sets the price – fundamentals, geopolitics, government, sentiment, etc...
 - Fewer energy market participants and lower liquidity
 - Corporate energy buyers in all shapes and sizes
 - CfDs
 - Cost of living





Richard Koiak
Head of Development
Onshore Wind
Renewco Power Ltd



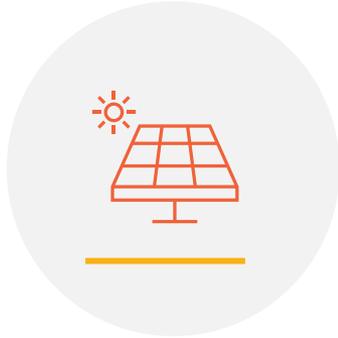
Renewco

P O W E R

Onshore Wind Conference: Working together to save money

September 2022

About Renewco



Developing utility-scale solar, wind and battery projects across Europe and the USA.



Targeting a 5 GW development portfolio by 2025



Led by a highly experienced and entrepreneurial group of renewables executives.



Backed by Corran Capital with cornerstone funding from SSE. Edinburgh based with a presence in the EU and USA.

Our aim is to maximise the renewable potential deliverable in a coordinated manner



Renewco
POWER

Hunting for Unicorns





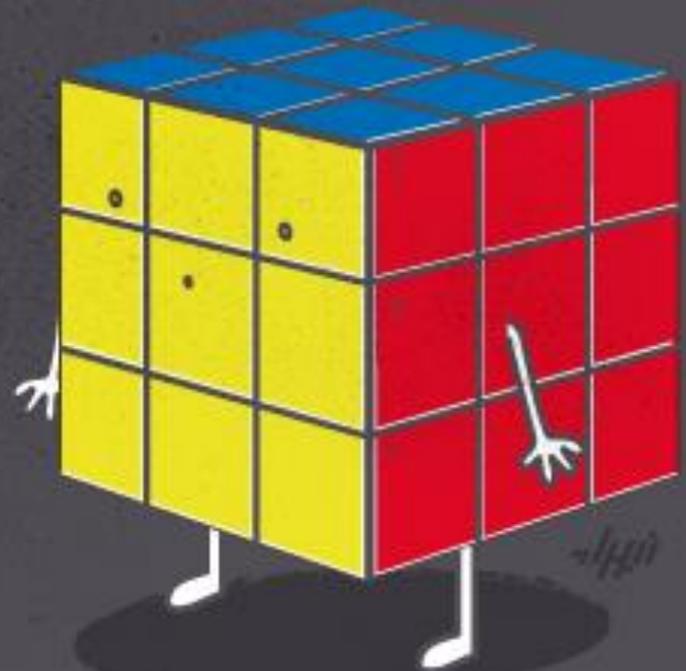
Renewco
POWER

Learning to share

My precious

Keep it simple

WHY DO YOU ALWAYS
COMPLICATE THINGS?!





Renewco
POWER

Working together



Richard Koiak

Head of Development Onshore Wind

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- ✓ **E** richard.koiak@renewcopower.com
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Stream A

Morag Watson

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Neil Marshall

Advisory Lead - Onshore Wind, Natural Power

Suzanne Clifton

Onshore Wind Principal Development Manager, EDF Renewables

Tim Foster

Head of Energy Services, Conrad Energy

Richard Koiak

Head of Development Onshore Wind, Renewco Power Ltd



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B2 - Grid-locked: untangling the issues of grid

Chaired by: James Robottom,
Head of Onshore Wind, RenewableUK

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James Robottom

Head of Onshore Wind, RenewableUK

Michael Dodd

Director, Market Area Manager, UK & Ireland, DNV

Nicola Crawford-Percival

Head of Regulatory Affairs UK & Ireland, RWE Renewables

Susana Neves e Brooks

Customer Connections Senior Manager,
National Grid ESO

Thomas McCormack

System Planning & Investment Manager,
SSEN Transmission

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Stream B



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A3 - Growing up - onshore wind as a maturing industry

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 Fred. Olsen Renewables

Dan McGrail

Chief Executive RenewableUK

SESSION SPONSOR

 Fred. Olsen Renewables

TJ Hunter

Senior Director, Development &
Operations UK & Ireland
Ørsted

SR / RUK Onshore Wind Conference

Growing Up - onshore wind as a maturing industry



September 7th, 2022

Our vision

Let's create a world that runs entirely on green energy

Great Britain



£10bn+

Invested constructing windfarms in the last decade



1,000+

turbines installed



4.9+ GW

installed capacity



4.2m+

homes powered by turbines



1

Ørsted Development-Construction-Operation

Global



£10.4bn

Revenue in 2021



12+ GW

installed renewable capacity globally



6,800+

global employees



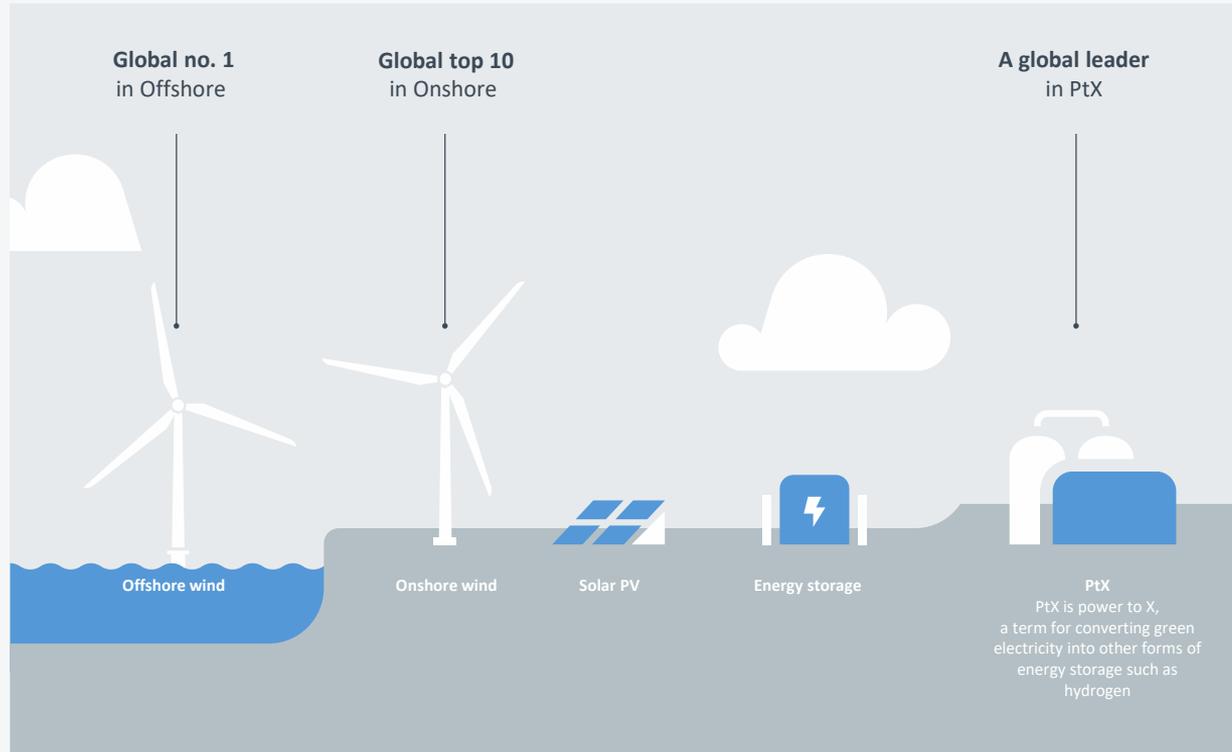
30+

years experience



#1

World's most sustainable energy company



Highlights

Hornsea 2

1.3GW

Located on the coast of England. Ørsted are proud to operate the world's largest offshore windfarm.

Kennoxhead Cluster

172MW

Located in Scotland and currently under construction. This onshore project when consented hosted the tallest onshore tip heights in the GB market.

Old 300

430MW

Located in Texas, US. Ørsted have recently commissioned one of the largest solar farms in the USA.

Carnegie Rd

20MW

Located in Liverpool, this was Ørsted's first venture into Battery Energy Storage Systems (BESS).

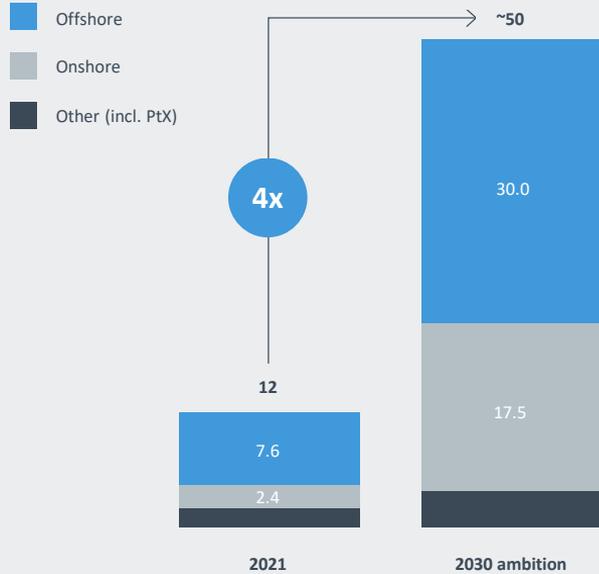
Maersk

675MW

Located on the Gulf Coast this landmark project will power the new Maersk shipping fleet with e-methanol.

Our 2030 goal is to be the world's leading green energy major

Installed capacity (GW)



Ørsted Onshore
360MW installed in
Ireland & significant GB
pipeline underway



Life Time Extension : When and What are the Decision Drivers?

- 1 **When should you open the discussion?**
- 2 **What are the components of that discussion?**
 - a Route to Market Environment
 - b Existing Consents and Consenting Environment
 - c Community Relationships
 - d Asset Condition survey, Residual Life and Disposal
 - e Existing technology and O+M support options
 - f Model it. Regularly!

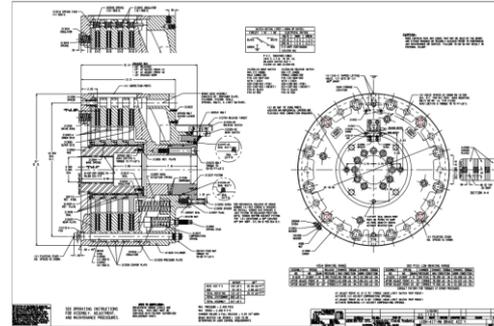
Growing Up - onshore wind as a maturing industry

Project Oversight

- COD in 1997
- Currently 9no 550kV Turbines
- Part of a younger operational cluster
- Merchant Revenue
- Obsolete Technology
- Third Party O+M Provider
- RePower Strategy in Parallel – turbine consent secured

Maximising the Investment ...

1 In Safety



2 In Availability



	Gearbox	Clutch	Generator	Blades	Blade bearings	Transformer	Nacelle	Pitch Linkage
T1	Green	Green	Green	Green	Green	Yellow	Green	Green
T2	Green	Green	Green	Green	Green	Green	Green	Green
T3	Red	Green	Green	Green	Green	Green	Green	Green
T4	Green	Green	Green	Green	Green	Green	Green	Green
T5	Green	Green	Green	Green	Green	Green	Green	Red
T10	Green	Green	Green	Green	Green	Yellow	Green	Green
T12	Green	Green	Green	Green	Green	Green	Green	Red
T15	Green	Green	Green	Green	Green	Red	Green	Green
T16	Green	Green	Green	Green	Green	Green	Green	Green

Our vision

Let's create a world
that
runs entirely on
green energy



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 Fred. Olsen Renewables

Finley Becks-Phelps

UK Development Director
Fred. Olsen Renewables

SESSION SPONSOR

 Fred. Olsen Renewables

Dr Rebecca Windemer
Senior Lecturer in
Environmental Planning
UWE University

Dr Rebecca Windemer

Senior lecturer in environmental planning | University of the West of England



Repowering and life-extension experiences so far

WHY IS THIS
IMPORTANT?

AGEING of EXISTING WIND FARMS

I'M GETTING
TO THE END
OF MY LIFE...

OPERATIONAL / CONSENT

WHAT'S
NEXT?



LIFE-EXTENSION?



RE-POWERING?



DECOMMISSIONING?



ABANDONMENT?

GROWING COMPETITION
FOR LAND



Repowering and life-extension: challenges for local planning authorities

‘I was right up to the wire on it in sort of making my mind up’

‘Making the right decision is the biggest challenge’

‘I felt that we were left in a bit of a policy vacuum’



Experiences of local communities

- In many cases opinions of the wind farm not changing over time
- Not all community experiences have been positive
- Differences in response to repowering and life-extension applications
- Significance of community - developer relations and meaningful community benefits
- Importance of how communities are approached during repowering
- Preference for repowered scheme when built



Potential opportunities for new forms of community benefit

- Not all communities value a community benefit fund
- Calls from the community energy sector for co-ownership of wind farms during repowering
- Opportunities, but also significant challenges



Key recommendations

For Industry

- Importance of ensuring good relations with the community over the life of an existing scheme.
- Involve communities from the very start of the life-extension / repowering process.
- Consider different forms of community benefit.



For policy

- Update local authority planners on the end-of-life options.
- Clear guidance for local planning authorities.
- Streamlined clear assessment process for repowering and life-extension.

Thank you
Any questions?

Dr Rebecca Windemer

Senior lecturer in environmental planning , UWE

Email: rebecca.windemer@uwe.ac.uk

Tweet: @RebeccaWindemer



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 Fred. Olsen Renewables

Julian Martin
Managing Director
ENERCON Services UK Ltd
and Vice Chair, SafetyOn



SafetyOn

Onshore Wind Health and Safety Organisation

How the industry maintains high-levels of health and safety standards and the work done so far

Julian Martin, ENERCON Services UK Ltd
Managing Director
Vice Chair of SafetyOn

Julian.martin@enercon.de

www.safetyon.com

In partnership with the
 **energy**
institute

The Energy Institute logo consists of an orange circle with a white swoosh that forms a stylized 'e' or a path, positioned to the left of the text 'energy institute'.

SafetyOn Membership

In partnership with the
energy
institute

SafetyOn

VATTENFALL 

 **Deutsche
Windtechnik**

BANKSRenewables
development with care


**natural
power**

 **renewableUK**

 **Statkraft**

 **sse
Renewables**

 **NORDEX**

 **acciona**
Windpower

SIEMENS Gamesa
RENEWABLE ENERGY

**Falck
Renew
ables**

 **GE Renewable Energy**

res RWE

 **Full
Circle.**

 **edf
renewables**

 **VENTIENT
ENERGY**

Vestas®

 **Fred. Olsen Renewables**

 **ENERCON**
ENERGY FOR THE WORLD

 **SCOTTISHPOWER
RENEWABLES**

Onshore Wind Health and Safety Organisation

In partnership with the
energy
institute

SafetyOn

- Providing leadership in health and safety
- Driving a consistent approach through collaboration
- Risk mitigation through co-operation and shared learnings
- A single industry voice on health and safety matters
- Approach welcomed by the Health & Safety Executive
- Facilitated through the Energy Institute
- Work Program steered by the Board through Technical Advisory Committee (TAC)





**Incident data
reporting**



**Good practice
guidelines**



**Safe by Design
workshops**



Safety release

“Thousands are employed in the UK’s onshore wind industry and SafetyOn is playing a part in making sure they all go home safe”

All SafetyOn publications are available for free download on our website
<https://safetyon.com/>



Good Practice
Guidelines



Safe by Design
Research Reports



Incident Data
Reports



Confined Spaces



Onshore Civils*



Management of Lifting



Electrical Safety



Organisational Factors



Welfare



Injury Trends



Life Extension

*In collaboration with G+ Global offshore wind health and safety organisation

- Safety and integrity issues relating to life extension of wind farm plant and specifically new risks that emerge must be managed
- IEC 61400-28 TS “Through Life Management & Life Extension of Wind Farms”
 - Structural Safety - Primary Load Path
- Must also consider technician safety
- Bring together owners and operators of ageing wind turbines in the UK and Ireland
- Share experience and improve knowledge of ‘good practice’ management of safety and integrity concerns to improve the safety of the industry as a whole
- Driving a consistent approach through collaboration



Contact details



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www.safetyon.com

www.publishing.energyinst.org



[@safetyontweets](https://twitter.com/safetyontweets)



[@SafetyOn](https://www.linkedin.com/company/safetyon)



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B3 - Working with communities: engagement, benefit and ownership

Chaired by: Marjorie Neasham Glasgow
Chief Executive Officer, Ridge Clean Energy

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Stream B

Marjorie Neasham Glasgow

Chief Executive Officer, Ridge Clean Energy

Callum Whiteford

Head of Communications UK&I, RES

Holly Backhurst

ESG Manager, Ventient Energy

Mark Brennan

Shared Ownership Manager, Local Energy Scotland

David Hannon

Strategic Project Director, Orkney Islands Council



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SHEPHERD+ WEDDERBURN

A4 - Planning in changing times: juggling the hot potato

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SHEPHERD+ WEDDERBURN

Emma Paton
Senior Associate
Shepherd and Wedderburn

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SHEPHERD+ WEDDERBURN

Ruth Findlay

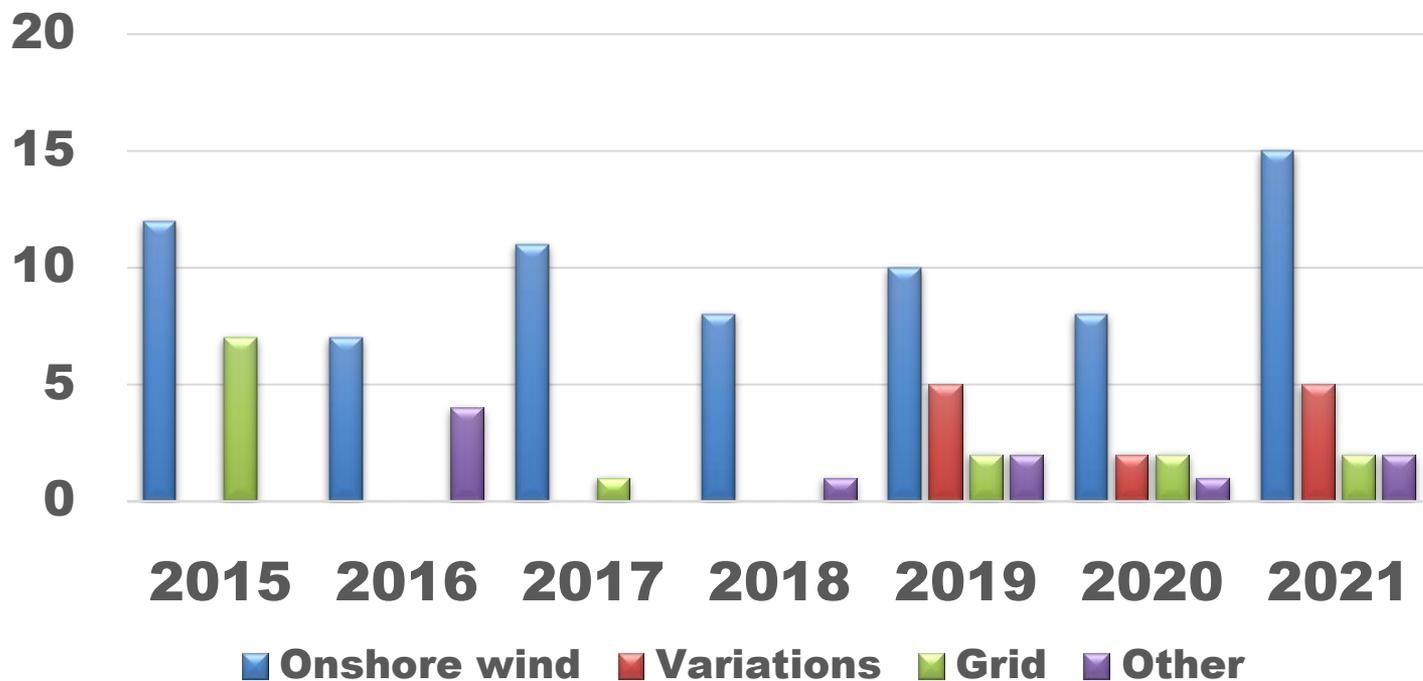
Head of Energy Consents Unit The Scottish Government

Onshore Wind Conference 2022

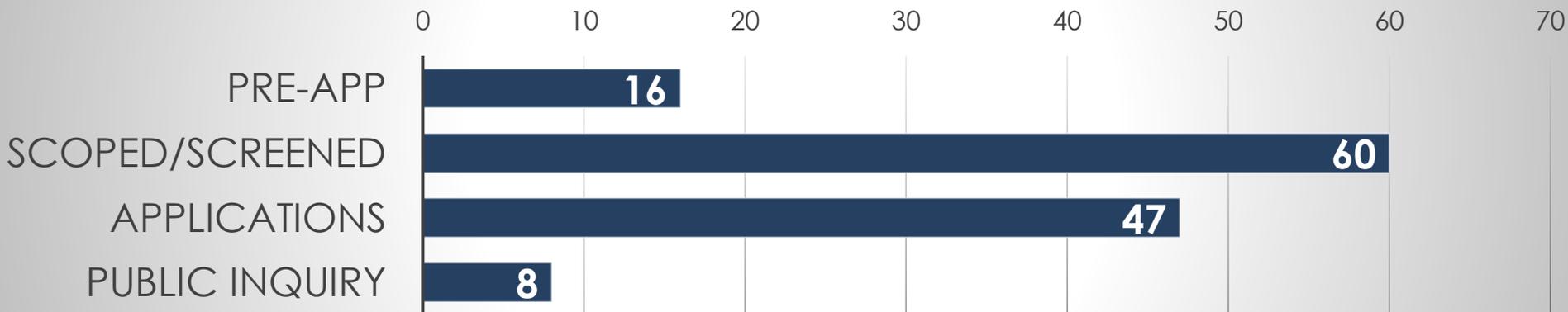
Ruth Findlay
Head of Energy Consents Unit
The Scottish Government



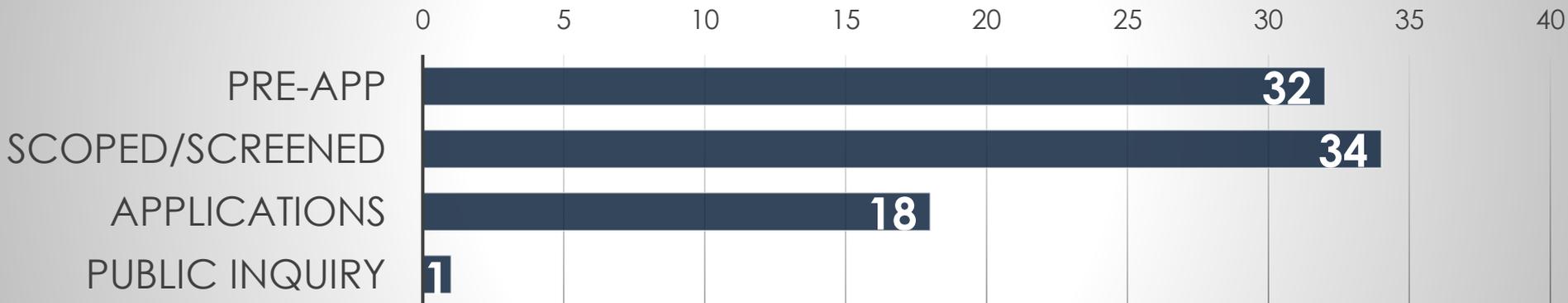
Applications determined



Onshore wind



Grid, battery, other



Ruth Findlay, Head of Energy Consents Unit
Email: ruth.findlay2@gov.scot Mobile: 07827 990480

Thank you

A black and white photograph of a wind farm in a hilly landscape. In the foreground, several wind turbines are scattered across a grassy slope. In the background, there are rolling hills and a range of mountains with patches of snow under a cloudy sky.

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SHEPHERD+ WEDDERBURN

Eleri Davies

Head of Onshore Development: Wales & England

RWE Renewables

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SHEPHERD+ WEDDERBURN

Lisa Russell
Planning Director
Stephenson Halliday



PLANNING IN CHANGING TIMES ...

Are we nearly there yet?

WHY ARE WE DOING THIS AGAIN?

- Environmental Impact Assessment is how we ‘look before we leap’
- Planning is how we ensure that people have a say in what happens to the places where they live, work, play and care about.



BUT DOES IT NEED TO TAKE SO LONG?

EIA:

- People want to see that what they care about and important environmental concerns have been considered – whether effects are significant or not.
- Unforeseen consequences of developments are best avoided.

But:

- Has become disproportionate and process / fear of litigation driven.

BUT DOES IT NEED TO TAKE SO LONG?

Planning:

- Is a well-designed process for managing change.
- Consultation is an important element of any process of change that affects people.
- People need time to be able to pay attention, consider and respond.

But:

- Under-resourced consultees and planning authorities struggle to respond in good time.
- Many involved feel they are not listened to.



IS THERE A BETTER WAY TO GET THERE?

- Under-resourcing is really hard to address...
... so perhaps we need to find a way to reduce the work.
- Bad habits are really hard to change ...
... so perhaps we need something that takes us out of that old routine.



MAYBE THE LURB WILL HELP?

Levelling Up and Regeneration Bill – a few key points:

- EIA to be replaced by **Environmental Outcome Reports**
 - not intended to be like for like
 - environmental outcomes set by Secretary of State
- Nothing to be imposed on devolved governments **without consulting them**
- **Design codes** to be part of local plans:

*“for every part of their area, the development plan includes requirements with respect to design that relate to development, or development of a particular description, **which the authority consider should be met.**”*

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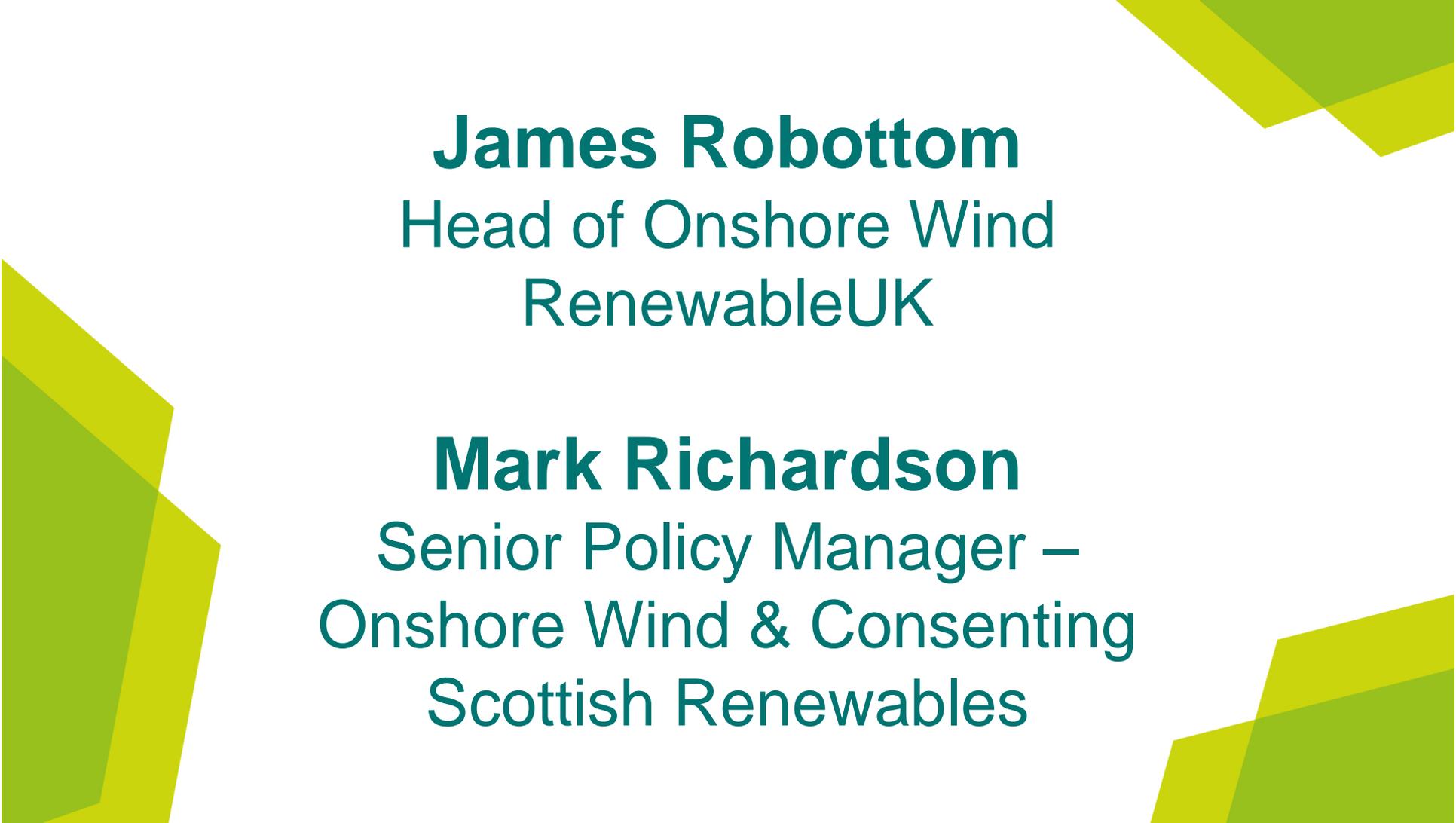
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