



scottish
renewables

ANNUAL REVIEW

2022-23



As I look over the year and read everything in this document I can't help but reflect that we are in something of a unique position.

We've maintained the political consensus on the direction of travel, and while the pace of that is a matter of keen interest and debate amongst the parties, we are in the enviable position that projects are being developed across all technologies. The industry as a whole is thinking harder than ever about not just driving big volumes of generation but of how we integrate that - we've hit the inevitable crunch point with our grid and networks and are seeking to set the stage for decades to come. Whilst this is not an easy task, it's an essential one.

We've met real challenges in terms of the deliverability of major projects but have maintained our poise as an industry in engaging with both the UK and Scottish Government, who thankfully have responded on some

of the biggest of these key issues. Energy policy and regulation is an ever-evolving puzzle, and the coming year will see us work harder than ever to get the next steps and the future focus right.

Major achievements for me have been the success of our campaigns highlighting key issues, which always trigger interest and discussion. The breadth and depth of our work on behalf of the industry is covered in these pages which demonstrate our importance as a sector to the economic and social fabric of Scotland and the UK.

Our work on the energy transition and on spotlighting the incredible expertise and capability in our supply chain is continuing to flourish. Through our Supply Chain Impact Statement and awards programme we see and recognise a culture of excellence and innovation in the companies who supply and deliver for the wider industry. Growing that capacity is the key challenge ahead of us and Scottish Renewables will be at the forefront of conversations that identify support and campaign for enabling actions in this space.

We've also that the need to drive acceleration of the deployment of large-scale renewables technology requires really grasping and tackling the barriers to increased deployment. We are using our resources from members to add to our own capacity to make sure that this happens, starting 2024 with a larger team and new skillsets.

You can read on for the detail on how much we've achieved but also how much we still have to do. I genuinely feel that we have taken some major steps to move forward some of our trickiest issues in the 2022-23 membership year and look forward to picking those up and running with them in the months ahead.

Claire Mack, Chief Executive



The renewable energy policy environment is always dynamic, but 2022/23 has seen some very significant change.

From the highs of seeing National Planning Framework 4 adopted and the Scottish Onshore Wind Sector Deal signed to the lows of the Contracts for Difference Allocation Round 5 failing to bring forward a single offshore wind project, things are never quiet on the policy front.

Our industry has continued to deliver for the people of Scotland, and we will continue to deliver as our new planning regime has seen more and more onshore projects secure consent, and our marine industry continues to go from strength to strength.

But all is not rosy as industry faces significant challenges. The scale and unpredictability of TNUoS charges, challenges over grid access and reinforcement and continued uncertainty about Habitats Regulation Assessments and strategic compensation all present serious threats to project deliverability, particularly in the offshore space.

As energy security and the cost of living crisis has focused minds, we have pushed ever harder for a more strategic, national approach to supply chain development to build on the Green Freeports announcements. The Review of Electricity Market Arrangements and the threat of Locational Marginal Pricing will keep us busy well into the future, as will the push for a market mechanism for long duration storage, a strategic plan for decarbonising heat, delivering a solar vision for Scotland and the development of a hydrogen economy.

As the renewables industry grows and diversifies, your Policy team is evolving to ensure we remain at the forefront of the energy transition ensuring that your voices are heard and that industry's asks play a fundamental role in shaping the policy that shapes our industry.

Morag Watson, Director of Policy



The 2022-23 membership year has been one of expansion and proactivity for Scottish Renewables' Communications team, with the former enabling the latter.

The growth of the number of companies in membership and the addition of our Partner members has enabled growth in our teams. This has in turn provided time to get on the front foot on issues which matter to membership. Most notably in 2022 that's meant the complex relationships between the fishing industry and offshore wind, and between communities and the network infrastructure needed for net-zero. Publications on both, led by the Communications team, have acted as anchors for wider work, much of it behind the scenes.

While we've continued to interact with journalists and politicians from all parties on a daily basis, I've been particularly pleased to see the expansion of another communications function: that of a trusted broker. Improved relationships with individual journalists and politicians have seen the number of requests for off-the-record briefings increase through 2022-23, with the content of those briefings often leading to notably more balance in media coverage and better-informed parliamentary debates.

Other policy issues which have drawn attention from media, politicians and policymakers have rarely been positive ones, and have required careful handling. In particular, the strain placed on the UK-Scotland relationship by a divergence in climate policy and the Scottish Government's challenges on heat decarbonisation remain topics on which balanced, thoughtful input is needed more than ever, and we look forward to providing that in the year ahead.

Nick Sharpe, Director of Communications and Strategy

ENSURING FIT-FOR- PURPOSE POLICY

Scottish Renewables' Policy team is skilled at receiving and refining member input and working to shape and influence the policies which underpin the renewable energy industry.

ECONOMICS AND MARKETS

Economic Impact of Scotland's Renewable Energy Sector – 2022 update

The Fraser of Allander Institute, commissioned by Scottish Renewables, published updated estimates of the economic impact of Scotland's renewable energy sector. The FAI estimates that the renewable energy industry supports more than £5.6 billion of output, more than £2.5 billion of GVA and more than 27,000 full-time equivalent jobs across the Scottish economy.

Review of Electricity Market Arrangements

Scottish Renewables responded to the UK Government's first consultation in the Review of Electricity Market Arrangements (REMA). Following the submission of our consultation response, SR has been attending the UK Government's Market Participant Forum to continue representing members in what is the most significant programme of electricity market reform in a generation.

Introducing non-price factors into the Contracts for Difference scheme

Scottish Renewables responded to the UK Government's call for evidence on introducing non-price factors to the CfD scheme. In what would represent the biggest change to the CfD scheme since its inception, SR highlighted the need to consider carefully how NPFs could improve on existing processes before proceeding with reform to ensure the continued success of the CfD.

REMA report: Reform to support Mass Low Carbon Power

Cornwall Insight, commissioned by Scottish Renewables and other industry bodies, published a report exploring the potential of delivering transformational change to the GB energy system via evolutionary reform of the CfD scheme. The report supported an incremental approach to market reform and found that revolutionary options under consideration, such as locational marginal pricing, could bring about costly disruption for those in the energy market, deter essential investment and put at risk the timely delivery of net-zero.

Action on AR6

Whilst some technologies saw success, the failure of Allocation Round 5 of the CfD to procure any offshore wind marked a significant setback for the sector. The results were hugely regrettable given the repeated warnings from SR and others across industry that auction parameters had failed to adequately account for increased headwinds facing developers. SR will be continuing to engage with government to ensure that AR6 is a success which gets the UK back on track to reach its 2030 target

GRID & SYSTEMS

Connections reform

Scottish Renewables has increased engagement with National Grid ESO and submitted a consultation response which outlines the challenges currently facing its connections customers and the need to update the connections application process. We actively engaged with our members during this process and as part of that organised a Connections Working Group to help formulate our response.

UK Government Strategy and Policy Statement for energy policy in Great Britain consultation

Engagement ahead of publication of the Strategy and Policy Statement for Energy centred on the need for certainty in this area, so we were pleased to see the document published – a move which we hailed as 'a positive development for the sector'. The document highlights a range of issues which will need to be addressed if we are to meet our net-zero ambitions, and we are continuing to engage to ensure an optimal outcome.

TNUoS Task Force

We continue to sit on the Task Force, which was set up following a successful campaign by Scottish Renewables and aims to improve TNUoS methodology, facilitating predictability amidst the volatility of TNUoS charges. So far the Task Force has assembled a prioritised list of key defects to be resolved, discussed analysis from consultants on potential changes, assigned sub-groups for different defect areas and created code modification proposals for reference node and scaling factors.



Ofgem Remit changes to include Net-Zero

After years of pressure from Scottish Renewables and industry body colleagues we welcomed the UK Government's decision to give Ofgem a statutory net-zero duty. This move will give the regulator the power to prioritise the UK's transition to net-zero emissions by 2050 and ensure that the energy sector aligns with the government's ambitious climate goals.

Scottish Parliament Net Zero, Energy and Transport Committee

We gave evidence to the Scottish Parliament's Net Zero, Energy, and Transport Committee inquiry into whether Scotland's electricity infrastructure was an inhibitor or enabler of our energy ambitions. The Committee's recommendations mirror many of our policy positions, with subsequent engagement showing the Scottish Government is aligned with our industry on many of the issues raised.

SOLAR

Promoting solar policy

We have long awaited high-level policy guidance on solar from the Scottish Government and have worked with our Solar Forum, associated working groups and Solar Energy Scotland during the course of this membership year to see it delivered.

We produced a Solar Strategy Briefing for government and met regularly with colleagues there to discuss barriers to solar deployment and related issues. Discussions led to a call from SR for the Scottish Government to set a target of 4–6GW of solar by 2030 and this ambition will now be included in the updated and soon-to-be-published Solar Vision.

Standing up for solar's rights

We responded to the Scottish Government's review of permitted development rights, supporting the expansion of this streamlining mechanism for all renewable energy development but most particularly solar and heat in listed buildings.

Solar in UK Government policy

Scottish Renewables submitted a response to the UK Parliament's Environmental Audit Committee inquiry into Onshore Solar Energy. We asked for a clearer path for solar thermal and for more pilot projects for hybrid co-located solar and battery storage systems and seasonal thermal storage. We recommended that the UK Government revisit the Smart Export Guarantee scheme and redesign it to align with the Climate Change Committee's Sixth Carbon Budget commitments. Additionally, we recommended that solar has its own pot in future Contracts for Difference rounds.

HYDROGEN

Supporting members

In this membership year we continued to work with members on renewable hydrogen policy issues through our Green Hydrogen Ambitions working group, exploring barriers to deployment and presenting solutions and industry knowledge to both the Scottish and UK Governments.

Hydrogen in wider government policy

Scottish Renewables submitted a response to the UK Government's Hydrogen Transport and Storage Business Models consultation, urging a holistic approach when the development of hydrogen transport and storage infrastructure is developed.

We also attended the UK Government's Hydrogen Production Business Model Stakeholder Forum, contributing member views during the formulation of heads of terms.

PLANNING

NPF4 becomes reality

February 2023 saw the adoption of the National Planning Framework 4, establishing the best planning regime in Europe for onshore renewables. This was the result of three years of hard work and lobbying by the SR Policy team to turn the deeply worrying first draft into the hugely positive final version, with much of the re-drafted text produced by SR being adopted verbatim.

Planning Conference brings industry together

Scottish Renewables' Planning Conference, held in Glasgow in February, was a well-attended event which identified required policy changes, business opportunities and obstacles to development, ultimately facilitating the consideration of the system changes necessary to ensure net-zero by 2045.

Local development plan progress

In response to Scottish Renewables advocacy, the Scottish Government has initiated improvements to planning and consents processes in a variety of areas that will impact renewables. With the signing of the Onshore Wind Sector Deal in September, the Scottish Government will aim to determine Section 36 applications for new sites, and for the re-powering of existing operational sites, within 12 months where there is no public inquiry, or 24 months if there is a public inquiry. This was a pivotal ask from industry and a huge win for our lobbying efforts. The SR Policy team is now working closely with the Energy Consents Unit to ensure this aim is realised.

IN THE PAST YEAR SR HAS BEEN INVOLVED IN A VARIETY OF THE SCOTTISH GOVERNMENT'S CONSULTATIONS RELATED TO PLANNING AND CONSENTS

- NatureScot's task to develop an adapted biodiversity metric that is applicable to NPF4 planning system is a product of SR's expressed concern that the Scottish Government's Biodiversity Strategy lacks urgency and adherence to the NPF4 planning system.
- The revised Flow Country World Heritage Site boundary and management plan is better placed to ensure it fully contributes to and facilitates net-zero progress. This is a result of SR's responses that highlighted the plan's issues and missed opportunities.
- The eight week consultation on the role of National Parks in Scotland's future has ensured that the newly nominated national park in Scotland will be treated differently from existing national parks with respect to NPF4 policy for onshore wind.
- SR is currently involved in the Scottish Government-convened Windfarm Development on Peat Group and is supporting civil servants by providing expert advice on matters relating to the impact of onshore wind development on peat and ensuring development is consistent with NPF4, climate targets and the Scottish Biodiversity Strategy.
- SR is also involved in the implementation of mandatory training on planning for elected members.

ONSHORE

Onshore Wind Sector Deal delivered for industry

Onshore wind achieved a major success with the signing of the Scottish Onshore Wind Sector Deal in September 2023. The deal sets out a series of key measures which will support the Scottish Government in reaching its target of 20GW onshore wind by 2030 - more than double Scotland's current operational capacity of 9.3GW. A key commitment is ensuring the time onshore wind farms take to go through planning is halved to only 12 months. This was achieved through the hard work of the Onshore Wind Strategic Leadership Group which was co-chaired by SR's CEO Claire Mack with the coordination of industry input led by the Sector Deal Lead, SR's Director of Policy Morag Watson.

Solving problems for abnormal loads

Scottish Renewables has been proactive in finding solutions to the issues regarding the transportation of abnormal loads to wind farm sites. Our Policy team has facilitated meetings with practitioners, members and high-level stakeholders, as well as leading the Abnormal Loads Legislative Reform process, which resulted in the abnormal loads guidance and fact sheet which is now available in the Onshore Wind Policy Statement.

Defending onshore wind in the media

Onshore wind has been the focus of media attention throughout the year, with our input adding facts to a sometimes febrile debate and setting out the economic benefits of this vital net-zero technology. Although several critical and inaccurate letters about the onshore wind industry were printed in The Herald in January, their impact was negated by the publishing of our response addressing the misrepresentation as a prominent feature in the same paper the following week. The press also highlighted onshore wind farms as a popular development amongst 80% of the public and one of the most scalable and affordable sources of energy.

Repower to the people

Our Repowering Onshore Wind Seminar, held in June, encouraged leading experts to share insights on opportunities in the sector and discuss how Scotland could secure a position as a global centre of expertise in onshore wind.

Supporting circularity

While the launch of the Coalition for Wind Industry Circularity, supported by Scottish Renewables, focused attention on the benefits of taking a circular economy approach to onshore wind, particularly during the repowering stage of projects. Research revealed remanufacturing and reuse of equipment could offer an economic opportunity worth tens of billions of pounds.

OFFSHORE RENEWABLES

Industry voice at heart of SMP dialogue

This year saw the starting gun fired on the iterative review of the Scottish Sectoral Marine Plan for Offshore Wind Energy. As the key process by which new evidence is brought forward to refine plan-level mitigation measure within the Strategic Environmental Assessment and Habitats Regulations Appraisal reports, it is of crucial importance to developers. A key focus of work for the SR Policy team, we have been hard at work throughout 2023 to ensure industry's voice is at the heart of the dialogue.

Steering National Marine Plan 2

This year also saw the launch of the National Marine Plan 2 process with Scottish Renewables securing a place on the Steering Group to put our industry's voice at the heart of marine policy making. The plan will be developed over the coming 24 months and will be adopted in late 2025 where it will play a pivotal role in shaping how the marine environment helps Scotland achieve its interconnected climate and biodiversity targets.

Building relationships with government

To reflect the importance of our offshore wind sector, the Scottish Government established a new Offshore Wind Directorate within central government to bring offshore policy making together in one place. We have been working hard, establishing strong working relationships with new recruits to the directorate and helping them get their knowledge and understanding of our sector up to speed.

Pic: Aerial Vision

Must-attend conferences set tone for sector

Two SR conferences in 2023 provided a place for the offshore wind industry to come together as Scotland continues to develop its ambition in the sector. Both our Offshore Wind Conference and Floating Offshore Wind 2023 broke records for attendee numbers, with the latter also attracting more international stakeholders than ever to the world's largest floating offshore wind market.

New ambition and collaboration on marine energy

The consultation on the Scottish Government's draft Energy Strategy & Just Transition Plan included an ambition to bring forward a marine energy deployment pathway for Scotland, to maintain our positions as a global centre of expertise. We convened a roundtable with Scottish Government to get the process underway, and we are collaborating with the Marine Energy Council to move this agenda forward.



LOW-CARBON HEAT

Heat Summit

We held a successful Heat Summit, in collaboration with BE-ST, in September in Hamilton. The summit sought answers to questions regarding the demand for heat pumps, whether installer skills could match industry demand and when government should begin to explain the realities of net-zero to the UK public. We are taking learnings from this event and building them into an action plan to take forward.

Action on permitted development rights

We responded to the Scottish Government's review of permitted development rights, supporting the expansion of rights for renewable energy development such as allowing multiple air source heat pumps for flats. More clarity is needed around the treatment of listed buildings in planning, and we continue to work on this issue.

Building a new heat standard

We submitted a response to the Scottish Government's New Build Heat Standard consultation. This requires new buildings from April 2024 to only install zero-direct-emissions heating. We recommended that the standard is technology neutral and does not incentivise one type of heating over others.

Heat networks legislation

SR is helping to draft and comment on the regulations coming from the Heat Networks (Scotland) Act 2021. In 2023, the work was completed for the zoning and building assessment reports regulations. This set of regulations became statute in May 2023, and we are currently working on the regulation of heat network consents.

Leading on finance

Mechanisms to finance low-carbon heat rollout are a key concern in the transition to net-zero. SR continues to be a core member of the Scottish Government's Green Heat Finance Taskforce and has been working on its Stage 1 Report.



TELLING OUR STORY

Renewable energy is at the forefront of the news agenda and as our industry goes from strength to strength Scottish Renewables is helping to shape the narrative across local, regional, national and broadcast media.

From providing press releases, media reactions, broadcast interviews and journalist briefings to drafting opinion pieces and letters to the editor, we work closely with journalists from across the UK every day to promote our vision of Scotland as a world leader in clean power.

TELLING OUR STORY

MEDIA

Where we've featured

The wealth of media coverage we've seen this year, for policy announcements like the Onshore Wind Sector Deal, media briefings such as our campaign for investment in Scotland's electricity network, our reports revealing 22,000 students in Scotland are taking courses relating to renewable energy, and everything else in between, is testament to a thriving industry that continues to flourish.

We work closely with journalists across the media spectrum which has seen our media releases, opinion pieces and interviews feature in print and online in publications including the Financial Times, the Times and Sunday Times, The Scotsman, The Herald, Energy Voice, reNews and more.



Media interviews

Several members of the team have appeared in national broadcast interviews on BBC and STV, both in the studio and on location, and also on regional radio such as Tay FM, Northsound and BBC Radio Shetland.

Protecting the industry

At Scottish Renewables, a significant amount of the Communications team's time is dedicated to fighting for our industry, and often standing up to well-organised anti-renewables campaigns.

As well as working closely with members on specific media enquiries, over the past 12 months we have responded to more than 200 calls and emails from journalists - almost double that of previous year.

Many of these enquiries have seen us refute unsubstantiated claims made in local and national news stories involving offshore and onshore wind, renewable heat, solar, Scotland's electricity infrastructure and more.

Working with journalists

We want journalists who report on our industry to know they can contact us at any time to fact-check a story they are working on or to obtain the knowledge and understanding that is often required to cover complex issues such as the Contracts for Difference scheme or Transmission Network Use of System charges.

This always-open offer has been well received, with journalists from high profile media such as the BBC, STV and the Financial Times regarding us as an important sounding board when reporting on the renewable energy industry.

DIGITAL

Social media following

In line with digital trends and our strategy, LinkedIn continued to perform for us in 2022-23 with a 38% year-on-year increase in follower numbers to 30,400. We're continuously investing to develop our knowledge of the platform to enhance our presence and support our members on social media. In addition, X followers have also risen 2% year-on-year.

Acronym Cheat Sheet

We have updated our website to include an Acronym Cheat Sheet as a helpful reference to stay on track of the abbreviations used to reference organisations, groups, policies and technologies across the renewables sector.



Blogs

Scottish Renewables' popular blog series continues with 165 postings to date covering a series of topics including the realities of owning an electric vehicle, the potential impacts of a Locational Marginal Pricing system and the effect of Norfolk Boreas decision on the UK's net-zero ambitions.

New Voices Campaign

We launched our New Voices Campaign to find a new set of industry ambassadors to take part in a series of workshops to build their confidence, learn to communicate more effectively in their professional lives and help us tell the world that we are an industry that welcomes and supports diversity wholly and completely.

Out and About email

Our new Out and About quarterly email provides an insight into events the team has attended across the UK and internationally including conferences, exhibitions, site visits, trade delegations and political visits, and also highlights what is coming up in our calendars.



TELLING OUR STORY

PUBLICATIONS

First for fishing

A first for Scottish Renewables, our document 'Fishing and offshore wind in Scotland - information and messaging for communications professionals' is intended as a guide to handling enquiries from the media and politicians and for speaking more widely with stakeholders about this challenging issue. It provides concise, agreed language which can be replicated by industry to ensure a joined-up approach when communicating the benefits and issues of building offshore wind in Scotland's shared seas.

Taking a stand for transmission

Our briefing on why Scotland needs more electricity network infrastructure was produced to empower politicians and other stakeholders facing questions from constituents and communities in the north of Scotland. The document, 'Why investing in electricity transmission infrastructure is a priority for Scotland', was widely praised as an accessible look at a complex topic which will shape the future of our industry, and is part of a growing project on this issue.

Filling a UK data gap

Once again Scottish Renewables stepped in to fill a gap left by the Office for National Statistics and provided the only cross-technology look at the impact of Scotland's renewable energy industry on the country's economy. The analysis, carried out by Strathclyde University's Fraser of Allander Institute, found Scotland's renewable energy industry and its supply chain supported more than 27,000 full time equivalent jobs and generated £5.6 billion of output in 2020.

Storing up issues

Our 'Economic Impact of Pumped Storage Hydro' report studied the economic impact of six pumped storage hydro projects currently in development in Scotland. These projects, if constructed, would add 4.9GW to the UK's existing capacity of 2.8GW. This would push the UK over halfway towards achieving the 15GW of capacity that is expected to be needed by 2050.

Supply Chain Impact report

A study ahead of the launch of 2022-23's Supply Chain Impact Statement found almost 90% of Scotland's renewable energy supply chain believe renewable energy is the biggest economic opportunity facing Scotland. The report (mentioned in more detail elsewhere in this Annual Review) is now a lynchpin of the supply chain calendar.



WHY INVESTING IN ELECTRICITY TRANSMISSION INFRASTRUCTURE IS A PRIORITY FOR SCOTLAND



FISHING AND OFFSHORE WIND IN SCOTLAND – INFORMATION AND MESSAGING FOR COMMUNICATIONS PROFESSIONALS



TELLING OUR STORY

IN THE PARLIAMENTS



WESTMINSTER

Ministerial talks

2022-23 was another busy year of engagement with the UK Government on key issues including electricity network upgrades, port infrastructure, Contracts for Difference reform and financial support for all renewable technologies. We have held meetings with Graham Stuart MP, Minister for Energy Security and Net-Zero; Andrew Bowie MP, Minister for Nuclear and Networks; and John Lamont MP, Parliamentary Under Secretary of State for Scotland.

Engagement across the aisle

We have also met many other key stakeholders at Westminster including Ed Miliband MP, Shadow Secretary of State for Energy Security and Net-Zero; Ian Murray MP, Shadow Secretary of State for Scotland; Stephen Flynn, SNP Leader in House of Commons; Wera Hobhouse MP, Liberal Democrats' Spokesperson for Energy and Climate Change, and many more cross-party MPs.



THE SCOTTISH PARLIAMENT

Face to face

Across 2022-23 Scottish Renewables has met more than 60 MSPs and Ministers through various meetings, conferences and events. This has been supported by regular engagement on behalf of our members through policy briefings and parliamentary questions.

The early bird

Our Renewable Energy Breakfast events have gone from strength to strength, with the new format proving popular with politicians from all parties. The drop-in sessions, held close to Holyrood, will continue to introduce a range of members to MSPs and their staff in the coming year.

New cabinet, new office

We have engaged closely with Humza Yousaf's Scottish Cabinet since his appointment as First Minister in March, including several meetings with Neil Gray MSP, Cabinet Secretary for Wellbeing Economy, Fair Work and Energy, and Màiri McAllan MSP, Cabinet Secretary for Transport,

Net-Zero, and Just Transition. We have also worked closely with Gillian Martin MSP, Minister for Energy and the Environment, who officially opened our new office in May and has since spoken at six of our events.

Policy wins

Scottish Renewables has enjoyed big policy wins over the year from the Scottish Government as a result of sustained political engagement on behalf of our members, notably the Scottish Onshore Wind Sector Deal, National Planning Framework 4, Green Industrial Strategy and a commitment to invest up to £500 million in the offshore wind industry.

Committee appearances

Scottish Renewables' Director of Policy, Morag Watson, gave evidence to the Net-Zero, Energy and Transport Committee's inquiry on electricity infrastructure and our Head of Energy Transition and Supply Chain, Emma Harrick, gave evidence to the Economy and Fair Work Committee's inquiry on a just transition for the North East and Moray.

TELLING OUR STORY



ENERGY TRANSITION AND SUPPLY CHAIN

Growing our presence

Following the recruitment of a Head of Energy Transition and Supply Chain in 2022 Scottish Renewables has created two additional posts to support the growing Scottish renewable energy supply chain. Our Supply Chain Officer roles have a focus on increasing our stakeholder engagement and developing events and marketing to provide enhanced business development support, foster collaboration and highlight industry success.

Expanding our network

Our Supply Chain Forum continued to grow, doubling from last year to 520 members. See the Digital and Campaigning sections of this Annual Review for more on how we've been developing our influence in this important area. We're also members of the Scottish Offshore Wind Energy Council's Supply Chain & Clusters working group and the Offshore Wind Industry Council's Floating Offshore Wind Taskforce, working at Scottish and UK levels to provide a unique voice for our growing supply chain membership.

External focus

We're dedicated to elevating our presence and engagement at events as a platform to engage with businesses new to the sector, to share our work and learn about how we can collaborate more effectively with the Scottish supply chain. This has included visiting several key stakeholders to gain a deeper understanding of their operations. The increase in external activities inspired the creation of our new Out and About newsletter to showcase where the Scottish Renewables team have been and key upcoming events in our calendar.

Making an impact

Scottish Renewables was delighted to welcome the Scottish Government's announcement of a Green Industrial Strategy. This was one of our five key recommendations to maximise the economic benefits of our renewable energy projects, grow the renewable energy supply chain in Scotland and ensure a just transition for suppliers across all green energy technologies. The announcement of the Scottish Government's investment pledge of £500 million in the next five years for the offshore wind supply chain is something Scottish Renewables has continuously campaigned for.

Highlighting success

In April we published the fourth annual edition of our Supply Chain Impact Statement, a showcase of the businesses and organisations working in Scotland's flourishing renewable energy industry supply chain. The publication featured 45 businesses across the Scottish supply chain and sets out how they utilise expertise, skills and capabilities to deliver specialist work across all renewable energy technologies.

Supporting connection

Scottish Renewables has been working to minimise the gap between buyers and suppliers as the industry grows rapidly. The Energy Transition and Supply Chain team has launched a Supply Chain Opportunities email, detailing projects that are seeking supply chain capabilities, specially dedicated networking receptions to strengthen stakeholder connections and Meet-the-Buyer side events at conferences.

CAMPAIGNING

Why Scotland needs more pylons, wires and substations

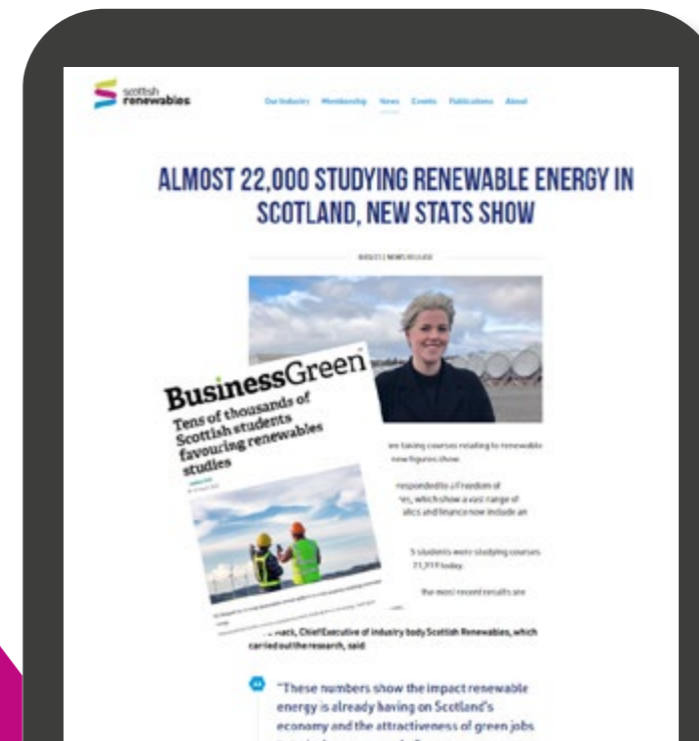
As detailed in the Publications section of this annual review, Scottish Renewables is taking action on the need to build more electricity network infrastructure to support the renewables deployment we need to meet net-zero and beyond. We're engaging, alongside member companies, with politicians and stakeholders to explain why these developments are needed and the benefits they can bring to local communities. Further research has been commissioned to support the goals around electricity network infrastructure which are fundamental to the development of renewable energy in Scotland.

Constantly communicating

Scottish Renewables is constantly in touch with both governments providing detailed recommendations and analysis on policy developments across the economic spectrum. Our input into the Chancellor's Autumn Statement and on the Scottish Budget, as well as to many other pieces of legislation, were developed with member input and sent in time to shape keynote announcements.

Skills in action

Without the people to design, consent, build and operate projects there will be no renewables revolution. Two pieces of work in the 2022-23 membership year highlight that skills are an issue constantly at the centre of Scottish Renewables thinking: an update of the previous research which showed almost 22,000 students in Scotland are taking courses relating to renewable energy – up more than 70% on 2019; and an ongoing study into the age of Scotland's planners, who are central to ensuring that the right projects get built in the right places, but whose numbers are dwindling.



A NEW HOME FOR SR

It has been a year of change at Scottish Renewables. The lease expired at our previous address and we took the decision to reflect the growth of our membership and team and expand and upgrade our office premises. Our new space, on St Vincent Place in Glasgow, was opened by the Scottish Government's Energy Minister and incorporates a designated member area with dedicated hot desk and meeting room space for member use.

The office building represents both the historical foundation and future aspirations of Scottish Renewables: it was the first red sandstone building to ever be constructed in Glasgow but has been upgraded to operate completely from renewable power and heat sources.

We have also made some upgrades to our website functionality as well as upgrading our finance system. These upgrades have been made to add efficiency and automation to our admin processes, particularly around member renewals.

Open recruitment

If there's such a thing as a good problem to have, Scottish Renewables has struggled with it this membership year. Member and industry growth means we're busier than ever and trying to grow the team, but recruitment for specialist posts has proved challenging. We held an open recruitment process for the latter portion of the year through which candidates submitted a short video – an innovation which was hailed by stakeholders as progressive and inclusive.



EVENTS

Scottish Renewables' events are a place to connect and network, helping you to get up to speed on the issues which matter in our industry and forge the relationships which will drive business growth. We want you to step back from the day-to-day and focus on what's next – because in this industry, there's always a new opportunity.

A place for industry

We held 20 events in 2022-23 spanning the technologies which Scottish Renewables represents. The events facilitated networking, thought leadership and provided room for those important discussions which aid industry progression or drive business development among members.

Growing events

Scottish Renewables' events in 2022-23 were attended by more than 6,500 delegates, an increase of 2,000 from 2021-22.

Return of YPiR

Scottish Renewables and partners, BayWa r.e. and Pinsent Masons were delighted to bring back the Young Professionals in Renewables Network with a sold-out networking reception, hearing from expert speakers on diversity and inclusion in the sector.

Net-Zero Energy Transition Awards go from strength to strength

Our #NZETA event welcomed 300 guests to Aberdeen for a glittering celebration of the renewable energy supply chain. The event, now in its second year, rewards those who're at the cutting edge of the transition from fossil fuels to clean energy.

Tackling members' key issues

The rapidly-changing policy environment sets the agenda for our quick-reaction seminar events. This year we picked up the baton on repowering onshore wind projects, how flexibility and storage will unlock new revenue streams for clean power projects and using market mechanisms to boost renewables deployment.

Consistent gender diversity

For the second year in a row we reached a 50% gender balance across our event programming – and were nominated for a diversity award as a result. We are also holding ourselves accountable to be more inclusive of diverse speakers with our New Voices Campaign.



MEMBERSHIP

In 2022-23, the number of organisations in Scottish Renewables membership grew by a further 8%, strengthening industry's voice and the breadth of knowledge and experience within our network. Almost 45% of companies joining membership in the past year are working in offshore wind or are transitioning into the sector, but we also increased membership in onshore wind, low-carbon heat, hydrogen, solar, hydro and wave and tidal.

Partner Member package

Following extensive member engagement activity we have introduced a new Partner Member package designed for organisations to be able make an enhanced contribution to Scottish Renewables for the overall benefit of our members and the industry. The new membership package was introduced to help meet the rapidly changing needs of our growing sector at a time where both offshore wind and onshore wind are in ascendency and other technologies are also advancing. Introducing these packages has allowed us to effectively resource our team and to further enhance our communications work. In 2023, we were delighted to welcome four new Partner Members: EDF Renewables, Ocean Winds, ScottishPower Renewables and SSE Renewables.



More resource to enhance our events and engagement activity

The events team grew to four, with a new Events Manager and a Membership & Events Officer joining the organisation. With strong growth across our events programme, new colleagues have helped us continue to deliver high quality conferences, seminars and awards dinners as part of our industry-leading events programme. The roles have also provided further resource to help with the delivery of our member events programme and support wider membership activity. The team also welcomed a Supply Chain Officer.

Increased working groups

As a result of positive feedback from members, and with a focus on continuous engagement, we have further extended our working groups and now have a total of 13.

For more detail on everything in our Annual Review 2022-23– 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.

FEBRUARY
2023



MARCH
2023



APRIL
2023



MAY
2023



JUNE
2023



JULY
2023



NOVEMBER
2022



DECEMBER
2022



JANUARY
2023



AUGUST
2023



SEPTEMBER
2023



OCTOBER
2023



OFFSHORE WIND CONFERENCE

24 & 25 JANUARY 2024
GLASGOW

GRID & NETWORKS CONFERENCE

15 FEBRUARY 2024
GLASGOW

OFFSHORE LOGISTICS CONFERENCE

JUNE 2024
GLASGOW

NET-ZERO ENERGY TRANSITION AWARDS

22 AUGUST 2024 | ABERDEEN

SCOTLAND'S ENERGY TRANSITION SHOWCASE

19 MARCH 2024
GLASGOW

YOUNG PROFESSIONALS GREEN ENERGY AWARDS™

18 APRIL 2024
GLASGOW

ONSHORE WIND CONFERENCE

3-4 SEPTEMBER 2024
EDINBURGH



FLOATING OFFSHORE WIND 2024

9 & 10 OCTOBER
ABERDEEN

