

ANNUAL REVIEW

2023-24



scottish
renewables



Claire Mack
Chief Executive

As the pace of change continues to accelerate, it is genuinely awe-inspiring to watch industry roll its sleeves up to meet that opportunity head on.

The past year has seen so many major milestones which each bring us that bit closer to our positive vision for Scotland's future. We continue to break clean energy generation records and have even surpassed a historic 30GW of wind energy capacity across the UK. With close to half of this capacity located in Scotland, no one can doubt the vital role our industry will play in the years ahead.

Not only do we take pride in what we achieve at Scottish Renewables, but also how we do that. Whether it be through our member engagement, the nominations to our awards or seeing projects up close, we know that this is an industry that works with head and heart. Collaboration has long been our watchword, and we are grateful for the ongoing support of members in driving progress with us together.

As we push the accelerator on the deployment of all renewable energy technologies, we know that we must grasp the nettle – or indeed the thistle – of the barriers to deployment. We've got to grips with how to accelerate grid through long overdue regulatory changes, including proposals to reform connections and consenting. Our repeated calls for holistic thinking through strategic planning and coordination have been heard, with the new National Energy System Operator tasked as an architect.

More broadly, we continue to advocate for the role of clean heat and emerging technologies as part of our future energy mix. We also continue to demonstrate why we need investment to stack up to deliver clean energy infrastructure at scale, including for a new generation of transmission networks, pumped storage hydro projects and those who supply wider industry.

We are proud to fly the flag of the supplier as we recognise that behind any successful industry must come a strong supply chain. Through an active programme of engagement we have enhanced our offering to a key area of growth at Scottish Renewables. In the year ahead we will look to build on this to create a truly world-class network of clean energy suppliers in Scotland.

At the heart of who we are at Scottish Renewables is people, and nowhere is that better demonstrated than at our must-attend events. During 2023-24 we were delighted to have welcomed the highest number of attendees yet to our conferences, seminars, receptions and awards, where we not only gather to network, but to grow businesses and lead debate.

Outside the exhibition hall, however, we must continue to work to improve the public's opinion of our industry by delivering more impactful content than ever. Whilst the transformation of our energy system can be turbulent, we can hold ourselves to some universal truths: new transmission will equal a faster transition, project deployment will equal employment and planning certainty will equal a first-mover advantage.

With both the Scottish and UK governments behind us to capture the benefits of an era-defining opportunity for our economy, I'm optimistic for what the year ahead holds. But with the clock ticking, we know that we can't slow down. The coming year will see us work harder than ever to inform, champion and lead on behalf of industry to ensure our members can grow, prosper and truly power ahead.



Photo credit: Natural Power



Morag Watson
Director of Onshore

The 2023-24 membership year has been a game of two halves, with the General Election in July 2024 heralding a significant change in emphasis, commitment and pace.

Since July 4, policy has proceeded rapidly. The new UK Government committed to making the country a "clean energy superpower" with ambitious targets to double onshore wind, triple solar power and quadruple offshore wind capacity by 2030. Mission Control for Clean Power, helmed by Chris Stark CBE, was established within days of the election to drive forward these ambitions. This is all welcome news for Scottish projects.

Subsequently, the UK Onshore Wind Industry Taskforce was launched with a mission to double UK onshore wind by 2030. Industry Taskforce members made it clear that Scotland will be doing the heavy lifting, and successfully delivering the Onshore Wind Sector Deal will be crucial to this ambition.

Much of our policy work post-election has been preparing for what we expect to see in the 2024-25 membership year. At the end of the 2023-24 membership year we were still awaiting the launch of the National Energy System Operator (NESO) and publication of the UK Government's Clean Power 2030 Action Plan. That document can now be seen as the lynchpin of government decision-making on energy, with its Mission Control spearheading actions to support delivery. 2025 will see the long-delayed Scottish Government Energy Strategy and Just Transition Plan.

There is never a quiet time in renewable energy policy, but as we review the past year and get ready for the year ahead, we are preparing ourselves to be busier than ever.

31 number of consultations responded to in membership year 2023-24.

500+

attendees to Policy Update Webinars

90+

companies in Task & Finish Groups

In our 2023-24 membership year we increased the capacity of our Policy team from five to 11:



2023
Policy team of 5



2024
Policy team of 11

ECONOMICS AND MARKETS

Review of Electricity Market Arrangements

Scottish Renewables submitted a significant response to the second Review of Electricity Market Arrangements (REMA) consultation in which we advocated for progressive market reform to protect the investment needed to meet clean power targets while delivering benefits to consumers. Scottish Renewables has also made several separate representations to Scottish and UK governments calling for zonal pricing to be ruled out in favour of a 'Reformed National Market'.

Constraint Management Market report

Scottish Renewables published a report commissioned from The Energy Landscape on the potential role of constraint management markets (CMMs) in our future electricity system. The report found that CMMs could be a key pillar of evolutionary reform delivered through REMA. The proposal to introduce CMMs was submitted to the NESO's Constraints Collaboration Project and has been taken forward for detailed assessment.

Long duration electricity storage

After many years of concerted campaigning we were delighted at the new UK Government's decision to introduce a cap and floor mechanism for long duration electricity storage. This decision aligned with Scottish Renewables' response to the UK Government's consultation on supporting investment in this technology, which followed advocacy undertaken by Scottish Renewables in partnership with the British Hydropower Association.

Clean Industry Bonus

Scottish Renewables engaged extensively with the development of the CfD Sustainable Industry Reward (SIR), the predecessor of the Clean Industry Bonus. We submitted a response to the UK Government consultation and coordinated industry feedback to draft allocation frameworks. We were pleased to see the Clean Industry Bonus adopt many of the same principles and design as the SIR when it was announced in November.

Scotland's Renewable Energy Industry Economic Impact Report

Our annual report on the economic impact of Scotland's renewable energy industry, produced by the Fraser of Allander Institute, found in 2021 that Scotland's renewable energy industry supports more than £10.1 billion of output, more than £4.7 billion of GVA and more than 42,000 FTE employment across the Scottish economy.



Contracts for Difference

We welcomed the results of Contracts for Difference (CfD) Allocation Round 6, in which almost 2GW of Scottish projects won contracts across various technologies. Scottish Renewables also submitted a response to the UK Government's consultation on proposed amendments to Allocation Round 7 and future rounds of the CfD.

GRID AND SYSTEMS

Grid & Networks Conference

Scottish Renewables held its inaugural Grid & Networks Conference in February, bringing together leading experts to focus discussion as industry reforms gained momentum. The event covered topics from the future of network charging to accelerating the connections process in the context of strategic planning. In the same week, we welcomed a new addition to our grid team with the arrival of our Grid & Systems Policy Manager Holly Thomas to support the growing work in this area.

Connections Reform

NESO has been powering change through the ever-evolving Connections Reform process, which we have been influencing via our responses to consultations. As the pace of change accelerates we have kept members updated and engaged in the process through informative briefings, collecting member feedback and organising member-only webinars with NESO on the reforms.

TNUoS Taskforce

We continued to sit on the Ofgem Transmission Network Use of System (TNUoS) Taskforce until its conclusion in the summer of 2024. The Taskforce was established to improve TNUoS methodology and facilitate more predictability amidst the volatility of charges. Simultaneously, we pursued work through our TNUoS Task & Finish Group that explored the evolution of TNUoS, including developing key alternatives to the current regime. As a result of this work, Ofgem has made the welcome proposal of establishing an interim cap and floor on TNUoS charges. We will continue to engage in developing the mechanism.

Network investment

In March National Grid ESO published its 'Beyond 2030' report, detailing the network investment required to meet the UK's 2050 net-zero target. Following publication, we have engaged with NESO and Ofgem on the delivery of these crucial network reinforcements. Through member workshops we have gathered industry views on accelerating funding and approval of critical network infrastructure and commented on the role of competition within the network space.

Strategic planning

With the new government bringing forward a wave of new ideas we have been busy keeping on top of various strategic plans and their interactions. We sat on the Clean Power by 2030 industry stakeholder working group, feeding back member concerns, and submitted a joint trade-body response to the consultation around Regional Energy Strategic Plans (RESPs). We have attended the first Strategic Energy Plan industry working group that is looking at the combined interaction of the RESPs, the Strategic Spatial Energy Plan and the Centralised Strategic Network Plan.



Colin Palmer
Director of Offshore

What an exciting 2023-24 membership year it has been for offshore renewables. Since joining Scottish Renewables as Director of Offshore, there has been real progression of offshore wind projects like the construction of Moray West and the Green Volt floating wind farm achieving a Contracts for Difference.

Development of the Clean Power 2030 Action Plan and a longer term, more strategic approach to delivering offshore renewable energy deployment has also been welcome. However, many challenges to enabling deployment in Scotland remain at the forefront of our work. In 2023-24 we engaged closely with industry and the Department for Energy Security and Net Zero (DESNZ) on critical issues, such as zonal pricing and TNUoS charging, and we will continue to prioritise this.

Over the past year we have also made progress on offshore consenting issues through our leadership of the Scottish Offshore Wind Energy

Council (SOWEC) Barriers to Deployment Group and supporting close working between industry, government and key stakeholders. We will use this momentum to progress areas like strategic compensation, secondary legislation and the Sectoral Marine Plan.

Development at the Port of Nigg for Sumitomo to build a cable manufacturing facility has been another highlight of 2023-24. Again, we use this momentum for development across Scotland's supply chain and ports & harbours infrastructure to ensure we capture the biggest economic growth opportunity for generations.

There continues to be a huge amount of ongoing, and upcoming, policy development that will have significant implications for offshore renewables. At Scottish Renewables, we will continue to work tirelessly to maximise deployment in Scottish waters and supply chain benefits across the country.



OFFSHORE RENEWABLES

New offshore renewables team

The 2023-24 membership year saw the creation of a dedicated offshore renewables team to focus on enabling and accelerating the development of offshore wind farms in Scotland's seas. The strategic move reflects the unprecedented growth of the offshore wind sector in Scotland and the unique opportunity to deliver a large-scale increase in generation capacity and transform the UK's electricity supply.

Colin Palmer
Director of Offshore



Mark Richardson
Head of Offshore Wind



Maggie Olson - Jow
Policy Manager – Offshore & New Technologies



Industry voice at the heart of offshore dialogue

We have continued to lead the Scottish Renewables / Scottish Offshore Wind Energy Council (SOWEC) Barriers to Deployment groups and workstreams, reflecting the importance of our offshore wind sector and proactively engaging with members and stakeholders.



SR/SOWEC Barriers to Deployment – Enabling (B2D-E)

This group is coordinating action to address environmental constraints affecting the deployment of offshore wind in Scottish waters. In December 2023 the group adopted a Risk Register that prioritises the key forecasted challenges and issues to offshore wind delivery in Scotland (and the UK) within the next year, aligned with OWIC Pathways to Growth 'Focus Areas'. In June 2024, the group adopted the Live Roadmap 2024-25, which lists objectives and desired outcomes alongside trackable actions and workstreams.

Some of the specific policy areas focused on and actions undertaken are further detailed below.

SR/SOWEC Barriers to Deployment – Coexistence (B2D-C)

This group is coordinating action to address the coexistence of the offshore wind and the fishing industries in Scottish waters. In 2024 this group delivered key workstreams such as the 'Fishing and Offshore Wind in Scotland – Information and Messaging for Communications Professionals' document, which seeks to align best practice in communicating these complex issues.

Steering offshore policy

Scottish Renewables has responded to consultations relating to the Sectoral Marine Plan and Iterative Plan Review, Marine Protected Areas and Fisheries Management, Nature Inclusive Marine Structures, Marine Recovery Funds, Marine Nature Restoration, National Marine Plan 2, Wet Storage and Assembly of Turbines, Sandeel Fishing, Improving Inshore Fisheries and Habitat Regulations Implementation. We also sent a letter to the Scottish and UK governments outlining the need for urgent action to ensure issues around strategic compensation, the Energy Act 2023 secondary legislation and development of Marine Recovery Funds are addressed as a priority to ensure our offshore wind pipeline in Scotland is supported.

Delivered key roundtables and workshops

In 2024 we delivered a wide range of roundtables and workshops covering strategic compensation, efficient resources and processes, Scottish wind energy ambition – systems mapping, Renewables and Fisheries awareness days, SOWEC B2D and OWIC Pathways to Growth alignment and ways of working, wet storage / inshore anchorage.



HYDROGEN

Hydrogen Risk Register

As the hydrogen sector continues to evolve we have been working with members through our Hydrogen Task & Finish group to develop a Risk Register of barriers to deployment. With the register now adopted by members, we are using it to identify our strategic priorities on hydrogen policy for the next year to support enabling the green hydrogen opportunity in Scotland.

Hydrogen in wider government policy

We submitted a response to the UK Government's Green Industries Growth Accelerator consultation, urging a holistic approach to integrating hydrogen supply chain infrastructure into the broader Green Industrial Accelerator programme. We also attended the UK Government's Hydrogen Investment Forum and the Scottish Government-led Scottish Hydrogen Industry Forum each quarter to input member views and engage with stakeholders on key issues in hydrogen.

WAVE & TIDAL

New ambition and collaboration on marine energy

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 position as a global centre of expertise. We worked with members and the Scottish Government to determine what was most needed in the sector. In response, Scottish Renewables and the Marine Energy Council have set up the Wave and Tidal Forum which meets quarterly to discuss enabling actions needed to accelerate the deployment of wave and tidal technologies.



ONSHORE RENEWABLES

Implementing the Onshore Wind Sector Deal

Signed in September 2023, the Sector Deal is the roadmap for achieving 20GW of onshore wind by 2030. In 2024, Scottish Renewables and the Scottish Government have been working closely with stakeholders to implement the 63 commitments in the Sector Deal. The early creation of a pipeline analysis has been the foundation of our work advocating against policies that bar onshore wind or make it too expensive to build projects providing the data needed to demonstrate policy impacts.

Boosting onshore renewables delivery at Scottish Renewables

Megan Amundson took up the Head of Onshore post in January 2024, with Jamie Blair joining us as Project Manager for the Onshore Wind Sector Deal in May. The onshore team is now at full strength, and it is full steam ahead with the delivery of the Sector Deal.

Filling the skills gap

As part of the Onshore Wind Sector Deal, Scottish Renewables and the Scottish Government have commissioned Optimat to research the skills needed to staff the onshore wind pipeline to 2030. The research identified specific skills needed throughout the lifecycle of a wind farm project, how many people will be needed by when, and where the demand will be highest. Follow-up research is identifying how we fill skills gaps and train new entries in the field.

Defending Onshore Wind in the Flow Country

The Flow Country was inscribed as a World Heritage Site for its Outstanding Universal Value in July 2024. As a steering committee member, Scottish Renewables worked with the Flow Country Partnership to ensure that onshore wind is not barred from development within the Flow Country boundary. We are now working to monitor how objections are handled for renewable energy development applications in and around the Flow Country boundary.

The UK Government Onshore Wind Taskforce

In summer 2024, the UK Government launched the Onshore Wind Industry Taskforce to unlock onshore wind in England and the UK. Our Chief Executive Claire Mack sits on the Taskforce, and Morag Watson, Head of Onshore, Emma Harrick, Director of Energy Transition and Supply Chain and Stephen McKellar, Head of Grid & Networks Policy, sit on subgroups advising on the policies the Taskforce will implement. A Taskforce report is expected in early 2025.



PLANNING AND CONSENTS

Shortening determination timelines

One critical component of the Onshore Wind Sector Deal is shortening the timeline for determinations. To achieve this, the Scottish Government has significantly expanded its Energy Consents Unit (ECU). Scottish Renewables has been collaborating with the ECU on several workstreams that will streamline the determination process and support the ECU in shortening determination timelines for members.

Maximising net socio-economic benefit

National Planning Framework 4 (NPF4) Policy 11c requires renewables projects to 'maximise net socio-economic benefit'. As local planning authorities develop their Local Development Plans with their own interpretations of what developers must do to meet the policy, Scottish Renewables is developing a new framework to capture how proposals can achieve 'maximisation' of socio-economic benefit for communities. We are working with members and BiGGAR Economics to finalise the report to be used in the next year.

Inputting member views

In our 2023-24 membership year we worked on a number of planning and consenting consultations:

- ✓ The Scottish Government's consultation on how to resource the planning system - a direct result of the Onshore Wind Sector Deal's goal of shortening determination timelines.
- ✓ NatureScot's consultation on meeting its 30x30 biodiversity commitment for nature led to Scottish Renewables working closely with NatureScot to develop how Other Effective Area-Based Conservation Measures will work in Scotland to ensure nature and climate are both prioritised land uses.
- ✓ NatureScot's consultation on a biodiversity metric for Scotland laid the groundwork for our work with the Peatland Expert Advisory Group to support its development.
- ✓ Multiple consultations on aviation from the Civil Aviation Authority and the Scottish Government have continued our work to ease barriers to onshore wind development from aviation concerns.
- ✓ Many local authorities released consultations in 2024 in preparation for their Local Development Plans. We have contributed to consultations around biodiversity, energy and maximising net socio-economic benefit and continue working on these policies in key local authority areas.



Photo credit: Paul Riddell

LOW-CARBON HEAT

National Heat Networks: A Vision for Scotland

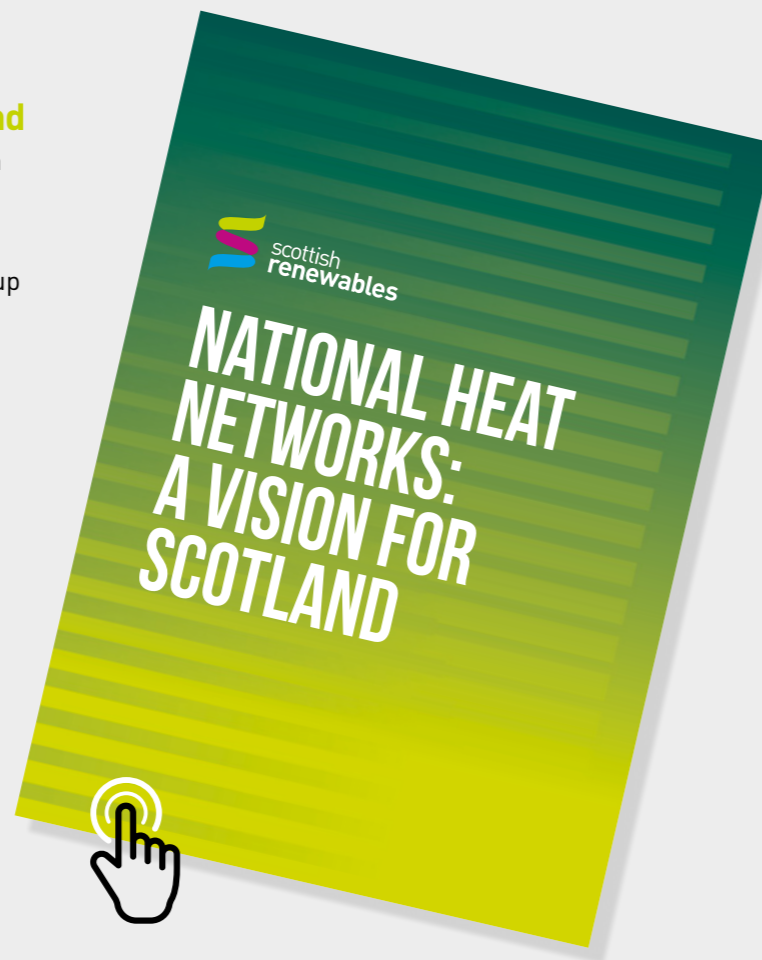
We have been developing our National Heat Networks Vision in collaboration with members. This is a thought leadership document on the benefits of city-scale and regional heat networks and the policy levers that would lead to the scale-up of district heating across Scotland. It was published in late 2024 and will be used as the anchor document for our heat network policy in the coming 12 months.

Green Heat Finance Taskforce

As a member of the Scottish Government's Green Heat Finance Taskforce, we continue to work on policy mechanisms to unlock investment in green heat. The group's Stage 1 report on how heat is financed for individuals has been published, and its Stage 2 report, which will set out financial solutions for communal heating and heat networks, will be finalised shortly.

Ofgem Heat Networks External Advisory Group

Scottish Renewables is currently seeking membership of the Ofgem Heat Networks External Advisory Group, which discusses the consumer protection regulations arising from the Energy Act 2023. Scottish Renewables believes heat networks need fit-for-purpose regulation if they are to be seen as credible and trusted by consumers. Membership of the group would allow us to advocate for that more effectively.



All-Energy heat networks session

We chaired a session on heat networks at the All-Energy Conference and Exhibition in May 2024. The session focused on what Scottish policy needed to do to move to city-scale heat networks.

Heat Networks (Scotland) Act 2021

We are currently working on the regulations coming from the Heat Networks (Scotland) Act 2021. In 2024, the focus has been on heat network licenses and consents, and a consultation on these is expected in the coming months.

Heat Consultations

We have responded to a number of critical consultations on heat policy in our 2023-24 membership year:

- ✓ We created a Task & Finish Group of heat members to respond to the Scottish Government's Heat in Buildings Bill consultation, which set out the proposed regulatory framework for the 2021 Heat in Buildings Strategy, a key piece of legislation for the heat pump and heat networks sectors.
- ✓ We responded to the Scottish Government's Draft Bioenergy Policy Statement, highlighting the role that bioenergy could play in rural heat networks.
- ✓ We responded to the Scottish Government's Passivhaus-equivalent consultation, which aimed to update the Scottish building regulations. Our response highlighted the need for buildings with either heat pumps or heat networks to have a good level of energy efficiency, including solar panels on the roofs.

UK Committee Inquiries

In addition to Scottish consultations, we also engaged at a UK level. We responded to the UK Government's Public Accounts Committee Inquiry on Decarbonising Home Heating, pointing out that focusing only on installation costs for heat pumps did not take into account their high operating costs and that equality between heat networks and other heating options was essential in policy if progress on large-scale heat decarbonisation was to be made.



SOLAR

Solar developers

This year we established a Solar Developers Task & Finish Group for members working on or considering Scottish ground-mounted solar projects. The group is developing a strategy to accompany the forthcoming Scottish Government Solar Vision, due in early 2025.

Barriers to deployment

As the Scottish commercial-scale solar sector continues to evolve we have been working with members, through a Solar Developers Workshop in January 2024, to develop a Risk Register of barriers to deployment. With the register now adopted by members, we are using it to identify our strategic priorities for solar policy.

Solar and battery energy storage systems

In collaboration with our Head of Onshore Wind & Consenting, Scottish Renewables' Head of Heat and Solar has been adding solar members with expertise in battery energy storage systems to our newly-created Battery Energy Storage Systems Task & Finish Group. As a result, developers who are installing co-located solar and storage projects are well represented in this group.

Scottish Renewables also delivered training for Scottish Government trainee Reporters on co-located solar with battery storage and provided expert advice to help this new type of application progress through the planning system.

NatureScot pre-application guidance for solar farms

We have been coordinating solar members' work with NatureScot to update its pre-application guidance for solar farms, responding to a detailed consultation on this matter.

Domestic rooftop solar

We asked questions in Parliament and commented in the media on the removal of the domestic rooftop solar component of existing home energy efficiency funding schemes and will be carrying out further work in this space to address member issues with the funding schemes which support solar deployment.

Trade association collaboration

We continue to work closely with Solar Energy Scotland and Solar Energy UK and align on policy and on promotion of the sector where possible.



Photo credit: Gillian Henderson

BUSINESS SERVICES UPDATE

Reviews set the standard

As last year was a year of change, this year has been a year of solidifying foundations.

A major review of H&S processes has been carried out to ensure best working practices and safety for our team. An external cyber security

audit has also been conducted to ensure the highest level of data security for our members.

We have also implemented a new digital platform to conduct the Scottish Renewables Board Elections to increase engagement in the elections process and facilitate a more refined user experience.



Jack Norquoy
Director of Public Affairs and Communications

As our clean energy transition picks up pace, Scottish Renewables' Communications team now stands six strong across media, digital, marketing and public affairs. Our mission is to ensure that the priorities of members are heard by all stakeholders and that our voice is impactful and responsive.

The 2023-24 membership year saw changes in government and more people than ever coming to our events. It also showed how global events can impact at home, placing not just greater emphasis on deployment but greater scrutiny on industry too. Scottish Renewables has responded with an effective and regular programme of political engagement with more accessible and creative comms content.

Change may be the political buzzword, but industry hasn't lost its watchword of collaboration. The SR Comms team works across the organisation to promote our events, voice our policy and showcase our members. In the year ahead, we will continue to find new ways to innovate and put SR at the forefront of the drive towards clean power and economic growth.

In that context, our door is always open. We want to hear from members about their news and views to ensure we keep our finger on the pulse of an ever-evolving landscape and to help them promote their successes. The year ahead will bring new milestones to celebrate and critique and SR will be behind industry and supply chain all the way, in the parliaments, papers and all the platforms.

Telling Our Story

MEDIA

Media enquiries

As renewable energy continues to dominate the news agenda across Scotland and the UK, we continue to work closely with newsrooms across the media landscape, resulting in more than 250 interactions with journalists in 2024.

Building and nurturing our relationships with the media has paid dividends, with significant coverage for our press releases, opinion pieces and interviews, which have been carried in print, online and broadcast. Our spokespeople have been interviewed by broadcasters including BBC Scotland, STV and LBC and featured in the Financial Times, The Times and Sunday Times, The Scotsman, The Herald, Energy Voice, reNews and more.

Transmission line research

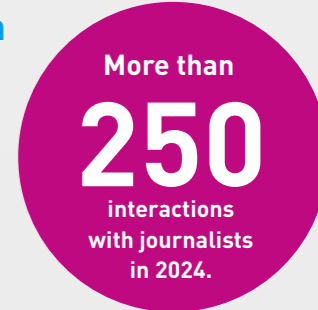
With electricity demand set to increase by 50% in the next decade and double by mid-century, effective electricity transmission is crucial if Scotland is to take advantage of its world-class renewable energy resources. As detailed later in the Publications section of this Annual Review, Scottish Renewables commissioned a report from BiGGAR Economics which found that the Beaulieu-Denny electricity transmission line has had no adverse impact on local house prices since it became operational in 2015.

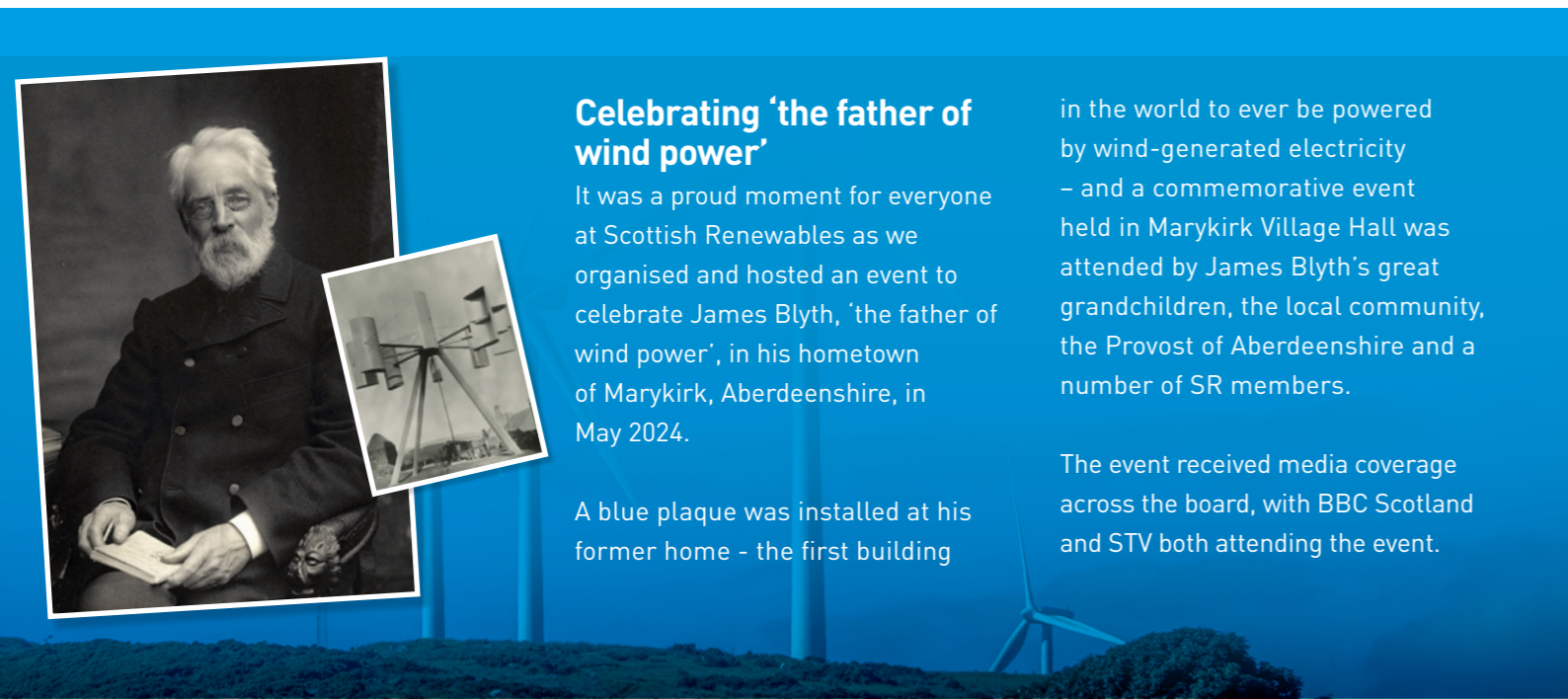
We worked with the communications teams at SP Energy Networks and SSEN Transmission to secure valuable media coverage for this report in local, national and trade media.

SR polling: Renewable energy is top career choice for young people

We commissioned a new North East Scotland poll which revealed that half of adults in the area believe young people should focus their careers on renewable energy.

The survey found 52% made the industry their top career pick for young people, beating eight other choices including healthcare (27%), oil and gas (24%) and finance (23%). The results received significant media coverage.





Celebrating 'the father of wind power'

It was a proud moment for everyone at Scottish Renewables as we organised and hosted an event to celebrate James Blyth, 'the father of wind power', in his hometown of Marykirk, Aberdeenshire, in May 2024.

A blue plaque was installed at his former home - the first building

in the world to ever be powered by wind-generated electricity – and a commemorative event held in Marykirk Village Hall was attended by James Blyth's great grandchildren, the local community, the Provost of Aberdeenshire and a number of SR members.

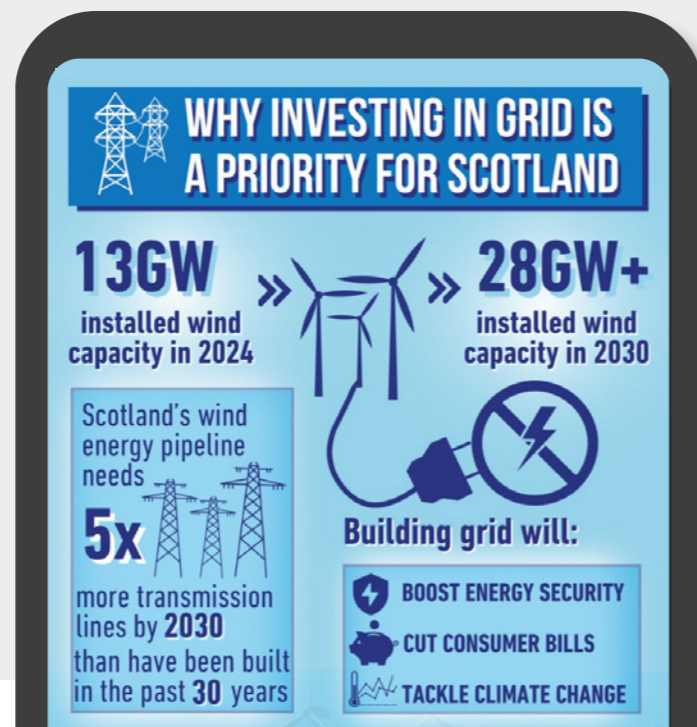
The event received media coverage across the board, with BBC Scotland and STV both attending the event.

Telling Our Story

DIGITAL

The Rise of the infographic

This year, we added infographics to our digital communications toolkit, using visuals to break down complex industry insights, enhance accessibility and increase understanding. This approach amplifies our industry's message and bolsters our dedication to engaging audiences on key issues in renewable energy. We're committed to widening access to industry knowledge and have exciting plans on the way... so stay tuned!



Lights, Camera, Action!

Our digital strategy's focus on dynamic storytelling sparked a major year-on-year expansion in video content, including providing training on video for our Communications Officer. Since January, our digital Comms team has produced 36 videos - a twelvefold increase from the three created in 2023. This ambitious growth strengthened our mission to keep our audiences informed in a fast-evolving industry, driving high engagement amid intense competition for attention in the digital space.

Renewables360

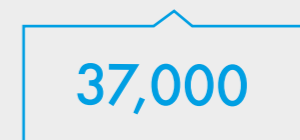
We launched Renewables360, an innovative project that leverages Google Street View to immerse users in Scotland's £10 billion renewable energy sector by bringing it to their screens. Featuring 12 unique sites, the campaign aims to demystify energy generation, promote public engagement and inspire pride in Scotland's renewable achievements through accessible, visual storytelling.

Wind Energy Week 2024

Our digital Wind Energy Week campaign on LinkedIn and X highlighted Scotland's wind energy impact and tackled key policy issues facing the industry through engaging infographics. This campaign significantly boosted our online presence, achieving a 47% increase in impressions, marking our highest-performing LinkedIn post of 2024, with MSPs sharing our regional wind energy impact graphics and amplifying our message.

LinkedIn Following

LinkedIn has again been instrumental in our digital strategy, with our following growing by 22% year-on-year, to nearly 37,000. This increase reflects our commitment to building a robust online presence that informs our audience, supports our members and amplifies our industry's voice. We're dedicated to continually refining our approach, expanding our platform knowledge and creating engaging content to maximise the benefit our work brings to our community.



Telling Our Story

PUBLICATIONS

A manifesto for Westminster

In our manifesto, launched ahead of last year's General Election, we set out the top priorities for Scotland's renewable energy industry over the next five years, highlighting the importance of attracting private investment, delivering strategic infrastructure and maintaining the UK's strengths in innovation. The document, Clean Energy Future: The Time is Now, outlined a powerful list of recommendations for the incoming UK Government.



House prices and transmission

Scottish Renewables commissioned a report, House Prices: Impact of Beaulieu-Denny Grid Infrastructure, to look at the effect of one of the largest grid upgrades

in recent decades on house prices along its route. The report investigated house price trends of properties in close proximity to the Beaulieu-Denny line and compared this to the housing market trends of the wider local authorities. It is now being used to respond to enquiries from media and others on the potential impact of planned upgrades across Scotland.

Labour's first 100 days – a plan for action

With a new UK Government incoming, we produced a short document highlighting that Scotland will be central to delivering Labour's mission of making Britain a clean energy superpower by recommending 'quick wins' for its first 100 days in power, designed to accelerate economic growth and reduce energy costs.

Latest Supply Chain Impact Statement

Our ever-popular Supply Chain Impact Statement brought together a snapshot of businesses working in Scotland's renewable energy industry, demonstrating the breadth and talent currently evolving to support this rapidly-expanding sector.



WIND ENERGY WEEK 24 - 28 JUNE, 2024



5 key areas for policy delivery:

- 1 Build grid infrastructure
- 2 Reform the planning & consenting system
- 3 Unlock investment through UK supply chain
- 4 Train the next generation of wind workers
- 5 Innovate through floating wind

#WEW24



Action for Wind Energy Week

Wind Energy Week 2024 was an opportunity to make the case for this vital renewable energy technology. We produced a comprehensive infographic to show the benefits of increased deployment, amplify the wind energy industry's achievements to date and highlight the positive impact our industry has for delivering energy security, more affordable energy and high-value jobs.

The crucial issue of constraints

In a report commissioned by SR, The Energy Landscape looked at constraint management and recommended that a portfolio approach to constraint management be adopted. Its recommendations were submitted to the National Energy System Operator's Constraints Collaboration Project and are being taken forward for detailed assessment.

Telling Our Story

NEW VOICES

Championing diversity, inclusivity and openness isn't just the right choice - it's essential.

2003

Billia Croo, the UK's first wave energy testing site, is commissioned at EMEC in

2013

Scotland's first solar farm, opens at Edinburgh College of Art campus in Midlothian

2023

Too many people still don't see themselves represented in renewable energy panels, boardrooms and leadership roles. Too many still feel out of place and hesitant to speak up in meetings, networking events and industry gatherings.

At Scottish Renewables we are passionate about developing diversity in our industry. That's why, in our 2023-24 membership year, we launched our New Voices campaign - the next big step towards a representative and inclusive renewable energy industry.

Open to anyone who feels underrepresented and wants to make their voice heard, New Voices took ten participants on a journey to equip them with skills they can utilise in their career going forward.

The campaign was made up of a series of workshops, held over the course of the year, which offered an in-depth focus on essential career development skills. It empowered participants to confidently share their insights and ideas at industry events and beyond, while providing a platform to expand their network, represent their business and serve as ambassadors for the renewable energy sector.

We're delighted to say that New Voices' reception across our stakeholder network has been uniformly positive and that the event will continue with another 10 participants in 2024-25.



Telling Our Story

In the Parliaments

HOLYROOD

All together now

We maintained a strong presence at Holyrood with regular meetings, two breakfast events and a Supply Chain Parliamentary Dinner bringing together members with scores of cross-party MSPs. In March, a Members' Business Debate also brought together cross-party MSPs to shine a spotlight on industry successes, while an investment roundtable in May homed in on industry priorities. Meanwhile Scottish Renewables continues to lead the Cross-Party Group on Renewable Energy and Energy Efficiency which meets regularly at Holyrood.



12 spoken contributions



5 Parliamentary motions



3 committee appearances

A new First Minister

Renewable energy remains at the heart of the Programme for Government, with tackling the climate emergency one of the top priorities outlined by the new First Minister, John Swinney MSP. In May, Claire Mack and Jack Norquoy had the opportunity to meet the new First Minister at Bute House, and Scottish Renewables welcomed him to the Floating Offshore Wind event in October.



Conference engagement

It was another successful year for our presence at the party conferences, kicking off with Scottish Labour in February with Claire Mack and Ed Miliband MP sharing the stage at Business Day. At the Scottish Liberal Democrats in June, we brought together Sir Ed Davey MP and Alex Cole-Hamilton MSP for a roundtable with members. We were at the Scottish Greens in August and then joined forces with ten energy trade associations in September for receptions at the Labour and Conservatives Conferences. September also brought SNP Conference, where we sponsored the energy panel which was joined by Gillian Martin MSP.



WESTMINSTER

Budget highs

Spring brought green shoots for industry with the Green Industries Growth Accelerator and Allocation Round 6 receiving a funding boost at the Spring Budget. Summer also saw successes with a record-level Contracts for Difference budget announced by the new Labour Government, a call led by Scottish Renewables which brought together 67 organisations, representing 20,000 jobs, in a letter to the new Prime Minister and Chancellor of the Exchequer immediately after the General Election.

Mission possible

The electoral victory which propelled Labour to Downing Street brought heightened ambitions for renewable energy in the UK Government, with a pledge to achieve clean power by 2030. Scottish Renewables' General Election Manifesto highlighted the challenges and opportunities ahead and on which we sought early action with new Ministers, including engagements with Chancellor Rachel Reeves MP, Scottish Secretary Ian Murray MP, Energy Minister Michael Shanks MP and many of Scotland's new MPs. Progress on long duration energy storage investment, industrial strategy and strategic planning have been welcomed so far.

Telling Our Story

ENERGY TRANSITION AND SUPPLY CHAIN

Bringing businesses together

In 2024, Scottish Renewables launched Supply Chain Engage, a series of focused roundtable sessions. The platform was created to bring together supply chain organisations from across the renewable energy technology landscape to address challenges and identify solutions to business growth barriers. The sessions so far have provided valuable insights and have directly influenced our work to support the industry, including by influencing and shaping the Scottish Government's Green Industrial Strategy.

Creating community connections

Continuing to expand our knowledge and champion the supply chain, this year Scottish Renewables carried out more than 390 unique engagements with members and other stakeholders across the sector. Our Supply Chain Forum expanded by 46%, we represented the Scottish supply chain at key events and we supported members' ambitions through tours and visits at sites including Forth Ports' Port of Leith, Haventus Energy Transition Facility, XLCC's new training facility and Hitachi's manufacturing facility in Sweden.



Leading the conversation

In May, we launched our Supply Chain & Logistics Conference to unpack the ever-changing demands and opportunities at play as we work to deliver the projects we need to transition to a green energy future. The event took place in Dundee and was attended by strategic ports, key policymakers, project developers and specialist suppliers.

Showcasing and celebrating excellence

From a shortlist of 44 finalists, this year's Scottish Green Energy Supply Chain Awards celebrated nine outstanding winners who are at the cutting edge of excellence in this vital area. The fifth annual edition of the Supply Chain Impact Statement showcased Scottish suppliers - from SMEs to large scale contractors - demonstrating their success in the sector.



Putting procurement in the picture

To ensure our members have visibility of upcoming business growth opportunities we continued to highlight initiatives and tenders that deliver real business benefits. Our quarterly Supply Chain Opportunities email shares procurement activity while our Meet-the-Buyer platform at conferences connect suppliers with buyers. Networking receptions further foster business development for suppliers, introducing them to potential clients and collaborators.

Events

Scottish Renewables' events, much like our industry, have been growing rapidly in recent years, and in 2023-24 we saw the highest attendee numbers ever achieved – up a staggering 50% on the previous 12 months. But one thing has stayed consistent – the industry-leading quality of our event programme.

Our events offer 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 to show you what's working, discuss what's not and get you the answers you need to help your business succeed – because in this industry, there's always a new opportunity.

attendee numbers
up **50%**
on the previous
12 months



Events that are worth attending

We held 20 events in 2023-24, covering the technologies which Scottish Renewables represents. The events facilitated networking and thought leadership as well as providing room for those important discussions which aid industry progression and drive business development among members.

More attendees than ever before

Scottish Renewables' events in 2023-24 were attended by more than 7,450 delegates, an increase of 2,500 from 2022-23.



Scottish Renewables' events in
2023-24 were attended by
7,450+ delegates

Award-winning events

The Scottish Renewables and RenewableUK Floating Offshore Wind event was awarded the Best Event Award at the Association for British Professional Conference Organisers Excellence Awards in December 2023.



Supply Chain Awards go from strength to strength

Our Scottish Green Energy Supply Chain Awards 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 are 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, looked at how flexibility and storage will unlock new revenue streams for clean power projects and at the market mechanisms which can 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

The number of organisations in Scottish Renewables membership grew by a further 9% in our 2023-24 membership year, strengthening industry’s voice and the breadth of knowledge and experience within our network. Almost three quarters of new member companies indicated they are involved in offshore and onshore wind, from developers to a wide range of supply chain organisations working across the sector, including operations and maintenance, ports, law firms and manufacturers.



PARTNER MEMBERS

Partner Member package

Our Partner Member package continues to help us support our growing sector, with Partner Members making enhanced contributions to Scottish Renewables’ work for the overall benefit of our members and the industry. As we entered year two of this new membership option, we were delighted to continue working with existing Partner Members - EDF Renewables, Ocean Winds, ScottishPower Renewables and SSE Renewables – as well as further strengthening our membership base by welcoming four new **Partner Members: BlueFloat Energy | Nadara Partnership, ESB, SEN Transmission and Statkraft.**



Building our team

In 2023-24 our team welcomed additional resource in various departments. Since the previous year the Policy team has more than doubled to include 11 team members, including a new Director of Offshore Wind – further solidifying our work to support members in this area. Our Communications team welcomed two new posts including a Communications Officer and a Public Affairs Officer and our Energy Transition & Supply Chain team saw a new Supply Chain Officer join the organisation. Adding further capacity directly helps us work towards our strategic goals, and ensures we are in the best position possible to continue delivering for our members.

More working groups and webinars

Our working groups continue to enhance our engagement with members and ensure that we have access to experts within our membership when it matters most. There are now 35 working groups representing members across the sector and coming together at crucial points to break down and overcome the barriers facing our industry. Our Policy team also continues to deliver regular online Policy Update Webinars which provide comprehensive updates on what is happening in the policy space, the key things you need to know about and what actions we are taking on your behalf.



