



2019 Business Plan

RenewableUK members are at the forefront of work to upgrade the UK energy system. Our members are defined by their entrepreneurship. Members large and small, international or home-grown are choosing the UK for investment and innovation in renewables.

Our members are challenging and disrupting the status quo, bringing down costs, delivering investment and making good our climate commitments. They are finding better ways of powering our economy.

RenewableUK's role is to represent these companies, promote their achievements and tell our industry's positive story. We enable our members to compete and win new business in UK markets and we support their expansion and growth abroad.

In 2017 we set out a three-year plan, covering the Organisation's new work programmes and priorities and making sure that Renewable UK was an effective and relevant organisation for our Members in new commercial and political environments. We gave more detail on our plans for 2018 last year. This is the final update to that business plan, looking back on 2018 and giving detail of our work for 2019.

1. Chief Executive's Note

It is a very exciting time for RenewableUK. Thanks to the support we receive from all our members, and our team's hard work over the last few years, our impact with political and media stakeholders is increasing and we are growing, with more companies entering membership and benefiting from world class events, networking and business growth opportunities. I am especially pleased that more and more small companies and members of the supply chain are entering membership. We celebrated our 40th anniversary in 2018 and our birthday party was not just a chance to thank our members and all those people who have worked to make our industry the success it is, but also a look to the future and the further significant changes that await as our sector builds the energy system of the future.

In 2019, we will be building on these successes and focussing not only on what we do as a business, but *how* we deliver for our members, to make sure that you are getting real value for your membership of RenewableUK. After a thorough review of the business in the last quarter of 2018, we will be offering new and bespoke services to our members, seeking more regular feedback on how we are doing and making changes internally to support our increased ambition.

To support these changes, Emma Pinchbeck has been promoted to Deputy CEO with increased responsibility over regulatory issues, Health and Safety and skills as well as our work on the wider electricity system. I have asked Maf Smith to focus on customer service this year, not only continuing to grow our events and membership offerings, but also to make sure we continuously improve our performance for you all. We also have a new Executive Director of Finance and Performance – Keith Moss – joining us in April. Finally, one of the issues you have raised is whether we can be clearer about who to contact when you need help on specific issues or technologies: our website will shortly be updated with clear staff descriptions and contact details.

Our members, who employ a quarter of a million people in the UK, are the powerhouse of a flexible, renewables-led energy system which is decarbonising the British economy faster and more successfully than any other nation in the G20. As our members raise their ambitions, we're changing to match those ambitions. Please keep the feedback coming, I know there is further to go. You can always contact me at ChiefExecutive@Renewable.com



Hugh McNeal

CEO

2. Our Vision & Values

Our vision is to ensure increasing amounts of renewable electricity are deployed sustainably across the United Kingdom, and to support our members in winning business in renewable markets around the world.

We will achieve our vision for our members by:

1. Making sure that renewable energy plays a leading role in powering the UK, with RenewableUK members at the heart of this delivery, whether as developers, as members of the supply chain, or in any other capacity.
2. Bringing demonstrable benefits to our members from their membership of RenewableUK. This means providing them with the highest possible quality services and information, supporting them in any way we can to do more, and better business.

Our objectives set out how we will work to deliver our vision for our members:

-  We deliver a wide variety of quality services, information and advice to our members which bring them value and enable them to grow
-  We represent our members to Government, decision-makers, including regulators and, through the national and local media, to the wider public and communicate and promote the benefits of the sectors and businesses we represent
-  We drive market opportunities for our members and future members through evidence-based thought leadership on the future of the UK energy market
-  We co-ordinate and convene our members, helping them to meet and do business, to become industry leaders and to guide and determine our work
-  We have strong internal corporate and management systems which are fit for purpose and able to support our wider work

We will continue to ensure that our vision for members continues to be aligned with our [organisational values](#) of being trusted, passionate, collaborative and innovative.

3. Our 10 Priorities for 2019

We are the trade body for the future electricity system, and you can expect to see more confidence, enthusiasm and policy work in this area from us this year. The primary barrier to a rapid, large-scale renewable energy transition used to be cost. Now that the cost debate – at least for commercialised technologies – is won, the issues we face focus on what the future electricity system will look like, and how far and how fast our technologies can dominate it. This change opens new opportunities for our members. You will see a key priority for the year is to develop an analysis of what this might look like to 2030 and beyond.

These new business opportunities will support faster decarbonisation of the power sector and the wider economy. Well over 70 of our current members are already moving beyond our traditional wave, wind, and tidal technologies to integrate with storage, smart technologies, and AI, and are exploring the services they can offer to other energy vectors like transport or heat. RenewableUK will provide new networking and B2B opportunities for the innovative ventures, technology developers and entrepreneurs that will shape the future of the energy system. We will advocate for markets and regulation that enable these new business models and services.

We are extremely pleased to be supporting the implementation of the Offshore Wind Sector Deal which industry is close to finalising with Government. By 2030, the deal should place Offshore Wind as the backbone of the UK's electricity system, with great ambition on diversity and people issues, as well as continuing to deliver high value, high skill jobs to communities where they can really make a difference. The deal will benefit our members and drive auctions to deliver our ambitions for the next decade and beyond. We will support our members to win work both here in the UK and in global markets and *Global Offshore Wind 2019* will explore the global opportunity for offshore wind in transforming energy systems and accelerating decarbonisation.

Our aim is to ensure that our members can fully develop the broad range of technologies and services that will be needed to build a low carbon energy system. Onshore wind is central to that mission and it is simply unacceptable that the Government in Westminster continues to stack the deck against development of the cheapest, large scale electricity technology. You will see we are working with members to launch a new onshore wind campaign this year which will sit alongside a wide range of actions to improve the business environment for onshore wind.

The successful journey of onshore and offshore wind to becoming the cheapest new power sources in the UK is a remarkable achievement by our members. We will continue to support our members taking forward the next technologies and setting out on that journey. Marine renewables and floating wind can write the next chapter in the UK's proud history of energy innovation. We will support our members to develop and deploy these technologies in UK waters as well as in global markets.

2019 will be a challenging year for our industries, with the impact of Brexit still unknown. Our job is to support you to build your projects, and to win work not only in the UK but also around the world. Notwithstanding the uncertainties this year may bring, I believe our 2019 priorities will do this.

Our 10 Priorities for 2019

1. THE FUTURE ENERGY SYSTEM	
Our Work Areas	Our Outputs
<ul style="list-style-type: none"> • We work to ensure timely delivery of and workable Smart Export Guarantee • We use our strategic partnerships with the STA, SMMT and other influential external partners to deliver events explaining this energy transition • We represent members on the Government's Smarter Systems Forum, and including the Laura Sandys chaired Data Taskforce • We focus our policy work on grid and charging barriers to new business models and technology deployment e.g. our response to Ofgem's TCR • We provide thought leadership, communications and marketing on this future energy system and the role of our members. 	<ul style="list-style-type: none"> • Launch of the RenewableUK Energy Vision • Joint meetings of the Grids and Systems and Markets and Regulations Working Group, focussing on 2025+ landscape • More attendees and more income for <i>Storage 2019</i>, <i>Smart Energy Wales 2019</i>, and <i>Smart Energy Northern Ireland</i> than in 2018 • A Whole System Member Forum launched by Q2 2019, involving current and potential Launchpad members, and existing members • A series of One Day Events focussed on specific issues like Storage • Detailed positions on charging reform, networks and issues like colocation published on our website and discussed in our working groups and forums.
2. SUPPORT THE OFFSHORE WIND SECTOR DEAL	
Our Work Areas	Our Outputs
<ul style="list-style-type: none"> • We champion offshore wind as a fundamental part of our current and future energy system • We support OWIC with advocacy and project management for the Sector Deal • We host the Secretariat and support additional staff employed by OWIC to work on the Sector Deal • We are accountable for the Skills Workstream of the Sector Deal 	<ul style="list-style-type: none"> • The Sector Deal for Offshore Wind agreed by Q2 2019 • Our advocacy and policy work on barriers to growth such as aviation, and market changes such as the transition to subsidy free market models, are aligned with Sector Deal • A successful <i>Global Offshore Wind 2019</i> event, making the case for the strength of the UK market and industry • Successful coordination of Offshore Wind Week 2019

3. ONSHORE WIND CAMPAIGN	
Our Work Areas	Our Outputs
<ul style="list-style-type: none"> We champion onshore wind as the lowest cost technology for the UK, and work with a project group of members to campaign on onshore wind's positive story We change policy to address barriers to onshore development, or route to market, or both, in the Energy White Paper 	<ul style="list-style-type: none"> A new PR and communications onshore wind campaign and successful coordination of Onshore Wind Week 2019 Publication of a Paper on repowering onshore wind Increased impressions for Onshore Wind Content on RenewableUK social media channels in 2019 vs 2018 A successful <i>Onshore Wind 2019</i> making the case for the future growth of the UK onshore market
4. SUPPLY CHAIN GROWTH AND EXPORT	
Our Work Areas	Our Outputs
<ul style="list-style-type: none"> We establish a Supply Chain Member Group We focus on delivering high quality events delivering valuable B2B opportunities and a clear return on investment We build on our partnership with the Department for International Trade to tackle barriers to export, and manage a programme of international conferences and missions We work in partnership with regional actors to make sure we hear from and give opportunities to members across the UK 	<ul style="list-style-type: none"> Publication of our <i>Export Nation</i> Report with national press coverage A successful RUK Cables 2019 Event which builds on our inaugural 2018 event Successful trade missions to US, China and Taiwan markets Supply regular and relevant information on emerging markets to supply chain members through email and Webinar Regular Project Intelligence Market Updates across our technologies
5. SUPPORTING INNOVATIVE TECHNOLOGIES	
Our Work Areas	Our Outputs
<ul style="list-style-type: none"> We ensure the Comprehensive Spending Review or Budget 2019 includes innovation funding mechanism. We support the Delivery of the Offshore Wind Sector Deal commitments on floating offshore wind We advocate and secure backing for an Innovation revenue mechanism, currently proposed as the Innovation PPA 	<ul style="list-style-type: none"> Parliamentary Debate on Wave and Tidal energy in Q1 High quality submission to the Spending Review 2019 A successful <i>Floating Offshore Wind 2019</i> event, strengthening its position as the UK's premier floating offshore wind event Establishment of the Floating Wind Taskforce, with Scottish Renewables

6. BUSINESS MODELS AND MARKET ACCESS

Our Work Areas	Our Outputs
<ul style="list-style-type: none"> • We engage our members, through our Working Group to inform our Markets and Regulations activity • We engage members to inform our response to the Government's Energy White Paper • We demonstrate thought leadership on subsidy-free models, and on future energy market design • We engage with investors and bring more financial community perspective to our policy positions 	<ul style="list-style-type: none"> • Publication of the RenewableUK Energy Vision

7. NON-MARKET BARRIERS TO DEPLOYMENT

Our Work Areas	Our Outputs
<ul style="list-style-type: none"> • We bring together key officials in DfT, BEIS, MOD and other relevant stakeholders to work on aviation barriers and opportunities • We work with Scottish Renewables to improve planning in Scotland; particularly for issues around tip heights for new turbines; support repowering of projects in England • We engage members through our Working Groups to inform our Grids and Systems; Consents and Licensing and Aviation working group activities 	<ul style="list-style-type: none"> • A successful <i>Wind & Aviation 2019</i> Event • A new report on barriers to offshore wind deployment and how these can be overcome • Political engagement to secure progress on aviation mitigation, particularly with MoD • Best practice case studies on industry's measures to mitigate impacts on birds and other wildlife

8. SUPPORTING OUR MEMBERS THROUGH BREXIT

Our Work Areas	Our Outputs
<ul style="list-style-type: none"> • We engage with officials in DExEU and BEIS on the issues raised in the RenewableUK Brexit Paper for Deal and No Deal scenarios • We work to support NIRIG on advocacy and briefings relating to any NI-specific issues on the functioning of the iSEM and all Ireland market • We support our international members in understanding Brexit and partner with Wind Europe to keep our sector informed 	<ul style="list-style-type: none"> • A Brexit-focussed Member page on the RenewableUK website that gives access to information and contacts in Government for Brexit • Member Forums and briefings to keep our members informed • <i>Global Offshore Wind 2019</i> will be the forum to learn about the practical changes that Brexit will make to our offshore wind members

9. BUILDING A SAFE AND SKILLED FUTURE WORKFORCE

Our Work Areas	Out Outputs
<ul style="list-style-type: none"> • We showcase industry good practice and support our industry to engage on Responsible Businesses, such as labour rights, just transition for workers, environmental and sustainability commitments, and other issues • We represent and support our wider membership to engage with <i>G+</i> and <i>SafetyOn</i> 	<ul style="list-style-type: none"> • A new Stakeholder Group of skills, training and education providers to help inform industry best practise and check industry's proposals for our workforce • A successful <i>Wind & Emergency Response 2019</i> Event • An inaugural RUK Technical Awards Lunch 2019 • A working group and represent our wider membership in the new <i>SafetyOn</i> organisation

10. PROVIDING EXCELLENT MEMBER SERVICE

Our Work Areas	Out Outputs
<ul style="list-style-type: none"> • We are active on social media, putting our new Social Media communications strategy in to practice • We update the RenewableUK website to showcase our technologies and inform our members • We know what our members think and take their views into account in designing our work and events 	<ul style="list-style-type: none"> • Refreshed Member Forums with better member-focus, external speakers and interesting content • A Whole System Forum launched by Q2 2019, involving current and potential Launchpad members, and existing members • Systematic surveying of members about their customer experience which informs how we continually improve

4. Evaluating our impact

It is important you have confidence in us not only because of what we say we will do but also because you know we measure our success and our impact.

We want newspapers and wider media sources to trust us and to write about you and our industry. We want politicians and their advisors to want to meet with us because they know we are important. In 2019, we have set stretch targets for our media and political impact, including, for the first time, on social media, with a focus especially on Twitter.

You rightly expect us to be a financially sustainable organisation. But we also want to grow our business so we can provide more support, and more bespoke services, to our membership. So, in addition to maintaining a tight grip on financial control, we also have set growth targets for membership and our events this year.

Finally, we want to know how you rate what we do, and how that compares with others. Building on the trials we began last year, we will seek feedback from each of the events and forums we hold this year, with an expectation that they will be, at least, 'good to excellent'; and we will test our overall effectiveness against fellow trade associations through an independent member survey with the same 'good to excellent' ambition.

5. Working with Our Members & Stakeholders

In 2018, we continued our work to improve our communication with members, holding more Connects across the UK, including our 40th Anniversary Connect in London, and introducing our Member Newsletter. We have also given members more control, through the Members' Area of the Website and our Social Link tool, of the information you receive from us – and of course updated how we manage your data, as part of a smooth transition to new GDPR rules.

This year, we want our Members to get the right information about our progress and receive regular feedback on our activities. In 2019, you will see the following activities helping to improve our member offer:

Hearing from You

- **Connects and Forums:** we are reforming our Forums so that each technology has a space to talk about any issue relevant to them, with varied programmes and external speakers. We commissioned more Connects in more regions of the UK in 2018, and these will continue in 2019 as a key space for members to network.
- **Working Groups and Project Groups:** we will regularly update the membership of our Working Groups to ensure that as many interested members as possible can participate. We will continue to form ad-hoc groups of members on issues such as Onshore Wind campaigning or Brexit to work on the priorities for this year.
- **Project and Technology Leads at RenewableUK:** we will publish an up to date organogram and team profiles to help members identify who is responsible for specific technologies or issues.

- **Event Partnerships:** in 2019 we started to include our sponsors in the design of our flagship Event programmes, services, and messages. This model helps us work with our members to deliver industry designed events and is now the model used for most of our key events.

Hearing from Us

- **Website Update:** we will be building on our work to make the Members-only parts of our website as useful and easy to use as possible, so that you can opt-in to the mailing lists and news you most want from us. We will be starting a new RenewableUK Blog and updating our staff and work programme information in the early part of 2019.
- **Regular Stakeholder Engagement:** our Sponsoring Members and Large Corporate Members now have regular personal meetings with our Senior Management Team about their work and membership. Other members have regular meetings with our teams.
- **Newsletters and Briefings:** in 2018 we started a regular Member Newsletter, and frequently send sector or issue specific Briefings to the membership via email. We will expand this further in 2019 – particularly using member webinars and in providing more detailed information on Brexit and export opportunities.
- **Social Media Strategy:** our new plans for social media will be implemented in 2019. We have invested in training and new tools for digital communication and looking to further raise our presence on social media. Members who want content and information from us should follow @RenewableUK on Twitter.

Your Membership

- **Defined Member Categories:** after a thorough review, the Board decided to remove our Correspondent Membership and invest in making sure our Small Corporate Members were accessing and using Project Intelligence and we had a clear offer across our Small, Medium and Large corporate members.
- **Launch Pad Membership:** we are seeing many new small and entrepreneurial companies entering the electricity market offering new services or technologies to the established market. We are trialling a new membership for this kind of company, giving them access to our market insight and business to business offering.
- **Improving Project Intelligence:** we will continue to publish flagship market updates for members. We are also further improving the user interface for our PI database so that it is easier for you and your teams to run your own analysis, running webinars and conference demos as often as we can, to make sure you can use the database fully.
- **Trade Missions:** we have recommitted to our relationship with DIT and will be taking Members to a variety of international conferences including *China Wind Power* and the *International Offshore Wind Partnering Forum* in New York, with Trade Challenge Partnership funding available to support our members at international events.

Working with Partners

While our head office remains in London and is focused on policy engagement in Whitehall and Westminster, our work across the whole of the UK is critically important to us. Working with partners is essential to deliver the national and regional aspirations for economic growth and environmental benefits that renewables deliver.

Some of our key partners:



Scottish Renewables are a critically important relationship in support of our shared membership, with representatives from each organisation sitting (but not voting) on the others' Board.



Irish Wind Energy Association – our partner and co-funder of NIRIG. Supporting our Northern Ireland members remains critically important, particularly given the challenges being faced with the NI Executive and Brexit.



RenewableUK Cymru team in Cardiff remains active in engaging the Welsh Government and has recently founded new groups on the smart energy system and on grid infrastructure.

Delivering our 2018 objectives in partnership:

- Publication of a joint report with the ADE on the financial benefits of a flexible and renewables led power sector for industry, including heavy industry, with a successful Parliamentary launch event and follow up advocacy with government
- Delivering a standing room only joint event on Energy Storage with the Solar Trade Association, securing national and industry press coverage, as it was timed with the release of our new Project Intelligence Storage Database
- An active member of an industry coalition working on the smart energy system, including all the major energy trade bodies, academics, and NGOs
- Working closely with the CBI and the REA on Brexit issues
- Continue to build on relationships with DIT for the delivery of our international events programme to support our members' successful growth across the globe

6. Our Delivery in 2018

2018 was a successful year for RenewableUK although we recognise the challenging business environment, especially for those members who are not involved in Offshore Wind.

Some highlights:

Our members are increasingly winning work both here and abroad. We highlight the previous year's successes in our Export Nation report each year. We supported trade missions to WindEnergy Hamburg, the International Partnering Forum in the United States, China Wind Power and the International Conference on Ocean Energy and are working closely with the Department of

International Trade to support UK members in their export success. We held five B2B Connects, as well as regular member / industry dinners, and expanded the reach and use of our Project Intelligence data service, giving members first-class information on supply chain, forecasts and contracts in wind, wave and tidal and now storage technologies. Interest in our industry brought delegations from around the world who wanted to learn from the UK's leading position in renewables. We hosted and met with delegations from countries including China, India, Saudi Arabia, France and Japan.

Global Offshore Wind 2018 was a tremendous success with 2453 delegates from 34 countries represented, 134 exhibitors, 198 speakers of whom 33% were women, 19 sponsors (including five Strategic Event Partners). Our campaign to highlight the successes of offshore wind culminated in the delivery of Offshore Wind Week 2018, with a series of events in Parliament at Westminster bringing supply chain companies and apprentices to meet with MPs and officials. We have played an active role in supporting industry in the negotiation of the Offshore Wind Sector Deal for the benefit of the industry and RenewableUK's offshore wind and supply chain members.

We continued to fight for onshore wind's crucial role in delivering cheap electricity – and jobs – across the UK, despite continued significant barriers from the Government in Westminster. We delivered two parliamentary receptions and continued to gain and maintain support from parliamentarians; a reception during Onshore Wind week with 30 MPs attending and the Business for Onshore Wind reception in the House of Commons with 20 MPs attending. A significant success was securing an amendment to the National Planning Policy Framework (July 2018) exempting repowering from the provisions set out in the 2015 written ministerial statement relating to onshore wind. Our campaigning work on onshore wind will strengthen this year, with a more ambitious onshore wind week, a focus on highlighting the technology as the lowest cost technology for the UK and us championing the benefits of offshore wind to local communities and businesses amongst other activities. Finally, we worked with our members to support the creation of SafetyOn, a new dedicated onshore wind health and safety organisation of leading UK onshore wind companies. Now established, we will make sure that we represent our wider membership in the successful delivery of this work and support this vital work in health and safety leadership.

We continued our engagement with HMT to explore new revenue mechanisms such as the IPPA to support pre-commercial technologies. State Aid clearance was granted and eligibility confirmed for island wind projects in the next CfD round. Disappointingly, UK Government did not provide an exception for floating offshore wind projects to access the Renewables Obligation. However, we continue to engage with the floating offshore wind industry including through the delivery of our annual Floating Offshore Wind event in partnership with Scottish Renewables. Our work to showcase the potential of the wave and tidal industry included holding a Marine Energy Showcase event in Westminster with a total of 33 MPs attending and showing their support for the industry.

Our focus for our small and medium wind members was to secure a clear transition to a non-subsided energy market. Throughout the course of the year, we continued our work on developing a sector deal for decentralised energy with a focus on our small and medium wind members. This was in direct response to the absence of a consultation on the Feed in Tariff despite regular engagement with BEIS officials, facilitated workshops with BEIS and members and continued engagement at all levels of government.

We continued to position ourselves as the trade association for the future electricity system with four successful events held over the course of 2018; Smart Energy Wales, Smart Energy Northern Ireland, Energy Systems Storage (in partnership with STA), and a joint report on decentralised energy, as well as a Parliamentary reception, in partnership with ADE. We extended the coverage of our industry leading Project Intelligence data service, tracking 400+ projects of 12GW+ in operation or

development across the UK. This progress will continue into 2019 with the launch of a dedicated systems member forum.

We built upon our portfolio of events for industry by industry by incorporating a new Event Partner model to support our events including Global Offshore Wind 2018, Cables18, Floating Offshore Wind 2018, Onshore Wind 2018 and Energy Systems: Storage 2018.



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