

Clean Heat Accelerator

21st November 2024

Welcome



Neil Kitching

Scottish Enterprise, Energy Specialist, Water and Heat







Clean Heat Accelerator

Neil Kitching







- New buildings coming soon Heat in Buildings Bill
- 2nd Accelerator
- 3rd Accelerator advertise Spring 2025
- Thanks to CLT







Clean Heat 2025

Date: 26 March 2025

Location: Double Tree by Hilton,

Glasgow Central

Submit an enquiry

Clean heat procurement webinars

- Webinar 1: Clean heat market and opportunities
- Date: 16 January 2025 Time: 10:30am 12pm
- Webinar 2: Getting tender ready and how to bid for clean heat contracts
- Date: 23 January 2025 Time: 10:30am 12pm



Manufacturing Factsheets (WIP)

- 1: Heat Generation
- 2: Building Energy Efficiency
- 3: Heat in Properties
- 4: Technology Enablers
- 5: Heat Distribution
- 6: Energy Centre Construction





Newsletter

Please complete this <u>subscription form</u> if you would like to receive an occasional newsletter from Scottish Enterprise on market opportunities relating to *Clean Heat*; including innovation funds, grants, market reports, events, webinars and exports.

For the regular news and updates mailing list, please select your topic preferences below:
Innovation and growth
☐ Transform business operations
☐ Innovation, digital and data
☐ Investment and strategic funding
☐ Exporting and market opportunities
Leadership and support for entrepreneurs
Industries
☐ Energy transition opportunities
☐ Clean Heat
☐ Hydrogen
☐ Offshore wind
☐ Manufacturing

Aims for the day and morning

- Objectives of day: To make connections and build networks that can provide support and opportunities for growth after the programme ends
- Make the most of the day.
- This morning: To understand range of support available from Scottish Enterprise and to discuss specific needs.
- Today we will hear from, and have the opportunity to meet with, from Scottish Enterprise:
 - Business Growth Hub
 - Innovation Team
 - Digital Transformation Team
 - Research Team
 - Sustainability Team





Accelerator



Agenda - morning

Time	Topic	
09:30 -10:00	Arrivals	
10:00 - 10:15	Welcome and introduction	
10:15 - 11:30	Scottish Enterprise Support Teams Presentations - Business Growth Hub – Denise O' Connor - Innovation Team – Bill Corr - Digital Transformation Team – Candace Adams, Analene Swan - Research Team – Jan Leach, Rachel Lang - Sustainability Team – Fraser Miller - Financial Readiness Team – Anne Featherstone	
11:30-11:45	Tea / coffee break and sign-ups	
11:45 – 12:45	Meetings with Scottish Enterprise Support Teams	
12:45-13:45	Lunch Opportunity to network with SE teams if have not met in previous session. Afternoon invitees arrive at 13:30	





Denise O'Connor Project Manager Gemma Wilson Customer Engagement Coordinator

November 2024





Business Growth Hub





Specialist Services Support

Regional Engagement One to Few / Many

SE Missions



Specialist Services



































Events

Clean Heat 2025

Bringing together innovators, investors, and industry specialists from one of Scotland's fastest growing sectors – clean heat. Learn how you can get involved and how we can support you.

Clean Heat is Scotland's largest annual event dedicated to the delivery of clean, renewable heat to buildings in Scotland. Its purpose is to generate interest in the clean heat supply chain by showcasing the opportunities that exist within it.

Clean Heat 2024 brought together 300 attendees, 30 exhibitors, and 31 speakers from across the clean heat supply chain. In 2025, we want to build on the progress we've made and take a look at what's driving the huge growth potential of the industry.

<u>Clean Heat 2025 | Scottish Enterprise</u> (scottish-enterprise.com)





Programme

Innovation Academy

Join us and our partners Defankle
Innovation, in our fully funded
Innovation Academy programme where
we will guide you through a series of
facilitated workshops, interactive tools
and one to one specialist support.

Introductory session 5th February 2025

Get in touch with your Innovation Specialist or Account Manager for more information or email

innovation.academy@scotent.co.uk





Programme

Leadership Development programme

If you want to inspire others and improve business performance, join one of our two Leadership Development programmes.

This programme is subsidised by Scottish Enterprise.

The price for each participant is £700 plus VAT.

The programmes start in August, January, and April. Contact us for dates of the next available programme.

<u>Leadership Development programme | Scottish Enterprise</u>

Regional Engagement





Business Gateway

https://www.bgateway .com/

support and guidance to businesses across
Scotland



Find Business Support

https://findbusinesssu pport.gov.scot/

funding and services offered by public sector organisations across Scotland



Ecosystem Guide

https://www.scottishenterprise.com/media/ 25sbwbah/scottishentrepreneurialecosystem-guideaugust-2023.pdf

SE's missions

- Our focus for the next three years and beyond
- Missions are how we focus our innovation, international and investment support to address key societal challenges and reshape global markets.





Driving capital investment to deliver a step-change in Scotland's productivity



Creating an internationally competitive energy transition industry in Scotland by 2030.



Scaling Scotland's innovation strengths into the high growth industries of the future.

The 3 I's

- . The areas we need to focus on to deliver our ambition.
- Missions allow us to deliver greater impact through opportunities and activities that will drive up levels of innovation, internationalisation and investment.

INTERNATIONAL



As well as attracting more international investment,
Scotland needs to grow exports to 25% of GDP to meet Scottish
Government targets as laid out in "A Trading Nation" – this means £5.6 billion more exports.

INNOVATION



Scotland needs more investment in business innovation and R&D to match the best-performing OECD economies. This means +22% or 2,500 more businesses innovating and +5% or £354 million more R&D investment per year.

INVESTMENT



Scotland needs to increase levels of business capital investment to see improvements in OECD rankings and needs +25% or 160 more high growth businesses to match the best performing UK regions.













An Introduction to

Innovation Ecosystem







Disrupting the Market



- Most companies are designed to deliver NOT to develop
- First Mover Advantage is more likely to succeed
- Market dynamics are quickening disruption cycles shorter
- Barriers to entry for many markets are lower than before
- Average lifespan in S&P 500 index in 1960 was 50 to 60 years, now it's 15 years and expected to drop to 12 years by 2025



Innovation Ecosystem

- The Innovation Ecosystem comprises the three distinct lenses through which a businesses' innovation activities can be viewed.
- Provides distinct focus upon, and the interplay between, Innovation Culture, Strategy and Process.
- Introduces businesses to the theory, thinking and practical application of innovation within each of the themes.
- At the intersection of Culture, Strategy and Process lies the Innovation Roadmap.



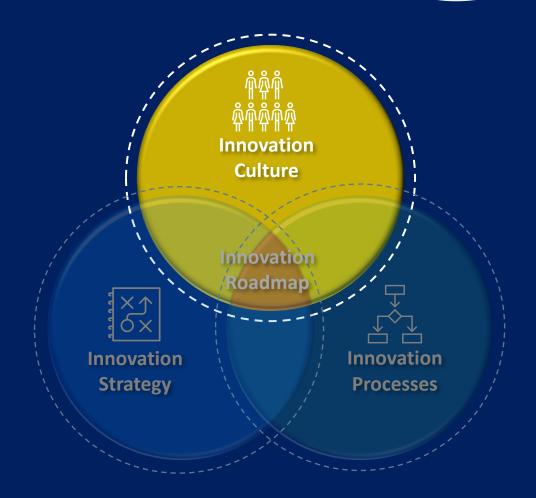


Innovation Culture

Innovation culture considers how people and organisational elements of a business, such as values, expectations and practices combine to enable Innovation.

- Leadership How supportive and open to other perspectives is your company's leadership?
- Goals How clearly stated are your company's goals?
- Adaptability How easily could you cope if your biggest customer left you?
- Creativity How many people in your company create relevant new ideas?
- **Embracing Failure** How well do you respond to project failure?
- **Innovation Readiness** How much of your turnover is from products released in the last three years?
- Working Environment Does your working environment encourage or enable staff to exchange ideas?
- **Open Innovation** How often do you work in partnership with other companies/entities?



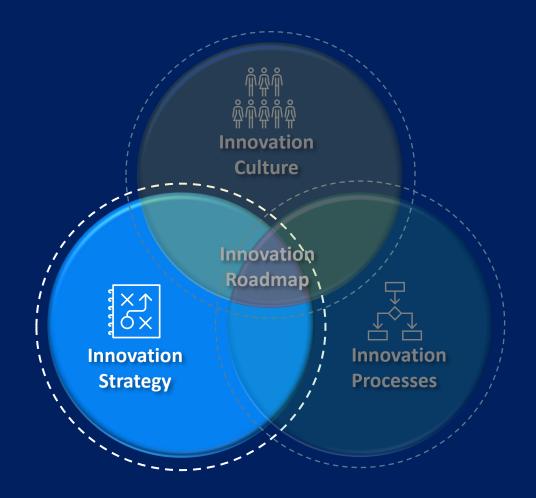


Innovation strategy

Innovation Strategy is aligned to overall business strategy and sets out how innovation activity is purposely structured to deliver against business objectives.

- **Vision** How clear is what you want your company to become?
- Mission How clear are the main things that your company is trying to do right now?
- **Strategic Alignment** How well-aligned to your overall business strategy is your innovation strategy?
- **Funding Strategy** How well-established is your plan to fund next 3-5 years developments?
- **IP Strategy** How well do you consider, record and protect potential Intellectual assets?
- KPIs How well aligned to your mission are your key performance indicators?
- **Empowerment** How well do you feel your staff are able to present their own ideas?
- **Level of Ambition** How well does your business encourage staff to develop radically new ideas?





Innovation Processes

Innovation processes are the tools and approaches that add structure, rigour and insight. They help businesses align innovation activities to pursue market opportunities.

- Business Modelling How well could you consider other potential business models?
- Value Propositions How clear is it to you the reason customers would buy from you?
- Supply Chain Mapping How well do you know where you sit in a supply chain?
- Design Thinking How aware are you of the principles of design thinking?
- **Stage Gate Model** How early do you test potential developments against the proposed opportunity?
- **S-Curve Theory** How well do you track the continued commercial viability of existing products?
- **Marginal Gains** Do you consider the gains which can come from multiple small improvements?
- MosCoW Method How structured is your approach to prioritising customer needs?





Business Growth S-Curve



Growth Towards Inflection Points

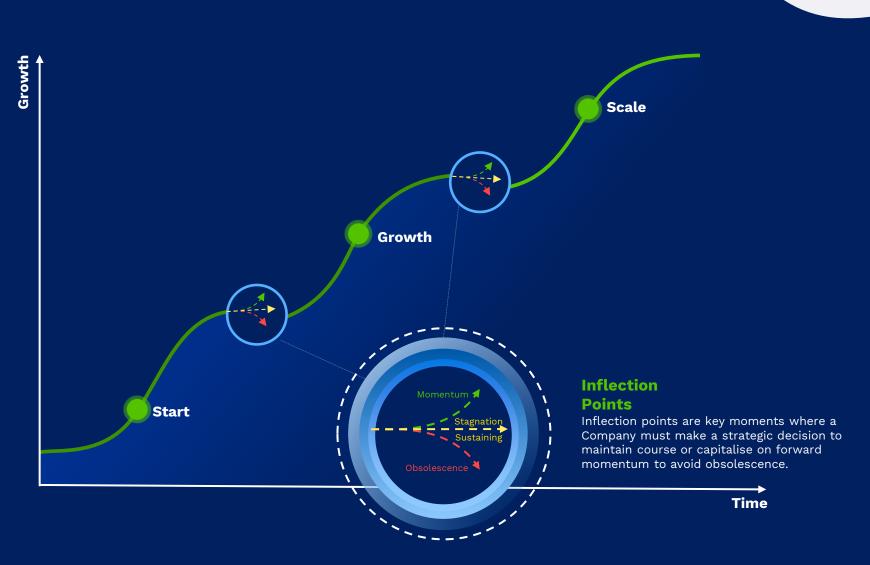
All growth businesses will reach strategic decision points where future direction must be addressed.

Inflection Points Vary

Internal and external factors can influence the nature and timing of inflection points (competitive environment, technological lifecycle, organisational capabilities).

Growth Requires Forward Momentum

The strategic decision taken at every inflection point is to maintain and sustain forward momentum and upward trajectory



Why Innovation is Vital to you

Scottish Enterprise

- Deliver solutions customers will value and pay for
- Identify, seize and exploit new opportunities
- Grow. Sustainably.
- Separate you and the competition

How to Innovate

- Consciously. Purposeful action to deliver meaningful innovation
- Competitively. Differentiated
- Committed
- Defensibly



Why Innovation is important for your business

Scottish Enterprise

- Innovation transforms creative ideas into useful, new and commercial solutions.
- It enables you to be adaptable and resilient.
- It fosters sustainable growth.
- It separates you from your competition.

How to Innovate

- Strategically ensure innovation is linked to growth opportunity.
- <u>Could vs Should</u> Where there's an identified opportunity to create value. Consider your core business as well as adjacent markets, segments, industries or geographies.







Digital Transformation

Specialists Team Overview November 2024



Who We Are

Our experienced team offers free, impartial advice and support on any aspect of Digital and IT. Based across multiple regions in Scotland, our Digital Transformation Specialists can support, guide and assist you and your company, ensuring you have the digital capabilities to transform and grow.

We have an appreciation and understanding of a wide variety of digital topics and development of digital and IT strategy, including but not limited to:

- ERP, CRM and other Software
- Applying digital technologies to the design, manufacture, sales and service processes
- Improving Data strategy, analysis and visualisation
- Protecting your business from internal and external threats





Our Service / How we can help



Through our deep knowledge and expertise, our team takes a 'business first, technology second' approach, taking the time to listen and understand your business needs and requirements.

- > Improve Your Business Efficiency & Productivity
- > Increase Your Capacity for Digital Innovation
- > Reduce Your Business Risk & Increase Resilience
- > Interpret your Digital, Data & IT Capability

Business Model inc. Product(s) & Service(s)

People & Culture Processes

Finance Partners Systems

Help to develop your **Digital Transformation Roadmap** for the future

We can help you to de-risk and manage change, while future-proofing your systems

Introducing new business models, new ways of working and insights from your data future

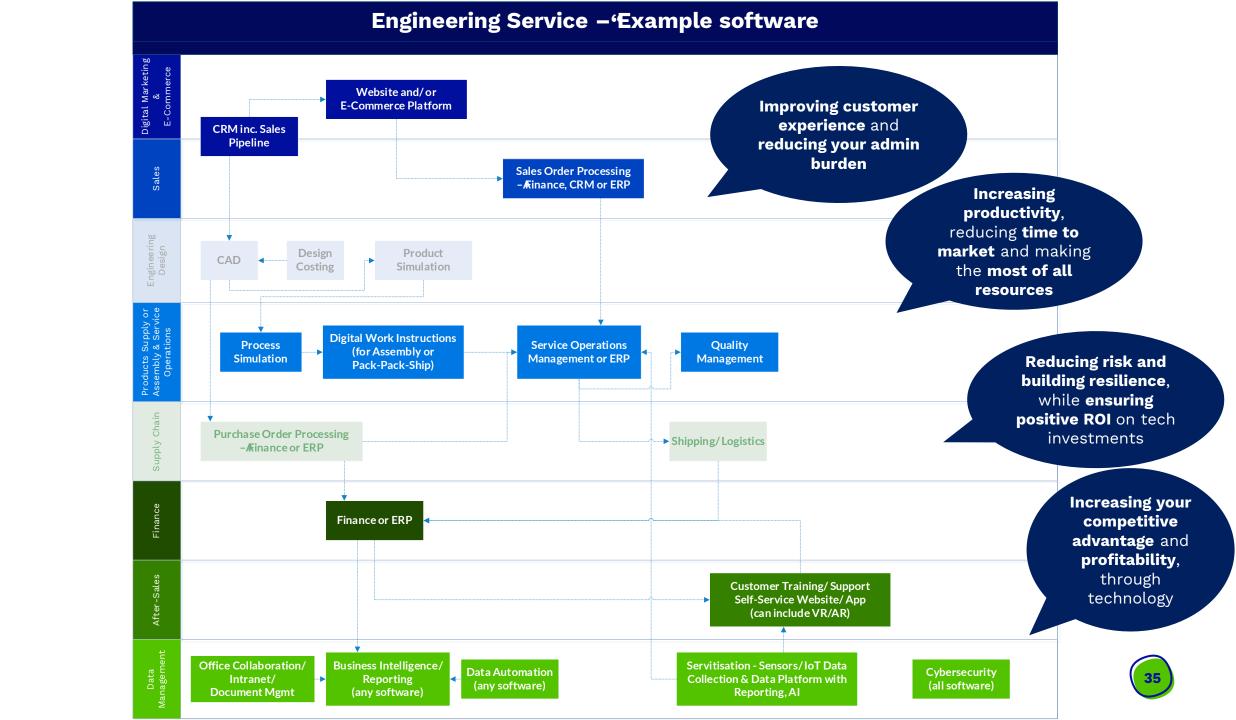
Understand where your capability gaps are and how to resolve them



Manufacturing - 'Example software Digital Marketing & E-Commerce Website and/or **E-Commerce Platform CRM inc. Sales** Pipeline **Sales Order Processing** -Æinance, CRM or ERP Engin ee ring Design **Product** Design CAD PLM Simulation Costing Manufacturing Control inc. Quality **CMMS Maintenance Digital Work Factory** Scheduling etc. or ERP Management Management **Simulation** Instructions Supply Chain **Purchase Order Processing** Shipping/Logistics -Æinance or ERP Finance or ERP **Customer Training/ Support** Field Service Self-Service Website/App Management or CRM (can include VR/AR) Office Collaboration/ Business Intelligence/ Servitisation - Sensors/IoT Data Cybersecurity **Data Automation** Collection & Data Platform with Intranet/ Reporting (any software) (all software) (any software) **Document Mgmt** Reporting, AI

Engineering Service – Example software Digital Marketing & E-Commerce Website and/or **E-Commerce Platform CRM inc. Sales** Pipeline Sales Order Processing -Æinance, CRM or ERP Engineering Design Design Product CAD Simulation Costing **Digital Work Instructions Service Operations** Quality **Process** (for Assembly or **Management or ERP Simulation** Management Pack-Pack-Ship) Supply Chain **Purchase Order Processing →** Shipping/Logistics -Æinance or ERP Finance or ERP **Customer Training/ Support** Self-Service Website/App (can include VR/AR) Office Collaboration/ **Business Intelligence/** Servitisation - Sensors/IoT Data **Data Automation** Cybersecurity Collection & Data Platform with Intranet/ Reporting (any software) (all software) **Document Mgmt** (any software) Reporting, AI







Example Projects

Type of Company	Example Project(s)	Typical Outcomes
Engineering Services	 Field Service Management System Tracking of people, vehicles, equipment Real time info on work 	 Provide a productive, responsive service to customers, maximising resources Save money on fuel
OEM	 Manufacturing Control Systems Sales Orders, Purchasing & Planning Shop Floor Data Collection 	 Ensure you manage all resources well: people, machinery, materials Ability to commit to OTIF delivery dates
All	Business Intelligence Reporting	 Easily understandable dashboards, from existing systems or spreadsheets Make decisions faster, with higher quality information

Next steps.....



We have advisory and Financial support available if your business is ready to transform.

For more information on our team or make an enquiry, please visit: https://www.scottish-enterprise.com/support-for-businesses/business-development-and-advice/digital-transformation-support

Contact Information:

Candace Adams <u>candace.adams@scotent.co.uk</u> Tel. 0141 468 5342

Analene Swan <u>analene.swan@scotent.co.uk</u> Tel. 0141 468 5045







Research Service

Jan Leach November 2024



Free Insights and Intelligence for Scottish Companies

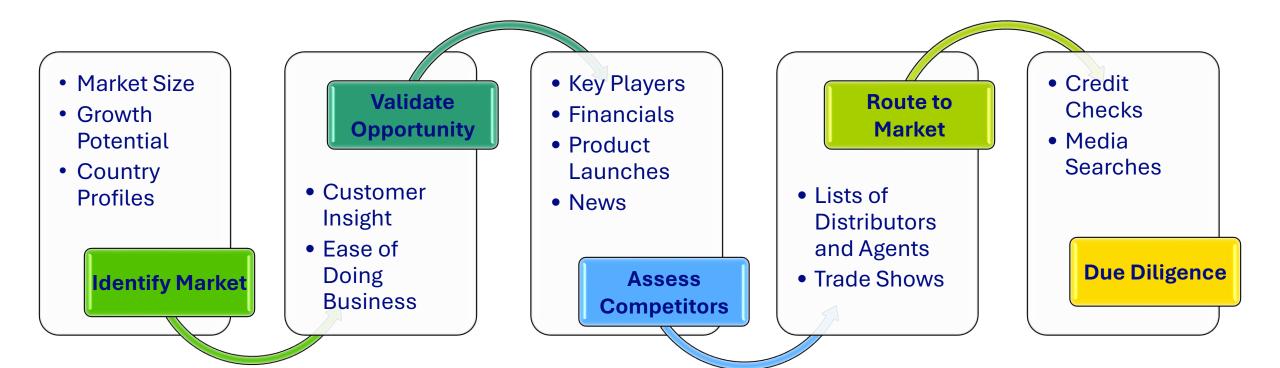


- Identify Market Opportunities
- Inform and Validate Market Strategy
- Build the Case for Investment
- Assess Competitors
- Source New Suppliers
- Undertake Due Diligence on Potential Partners



End to End Research Support





Subscription Resources

























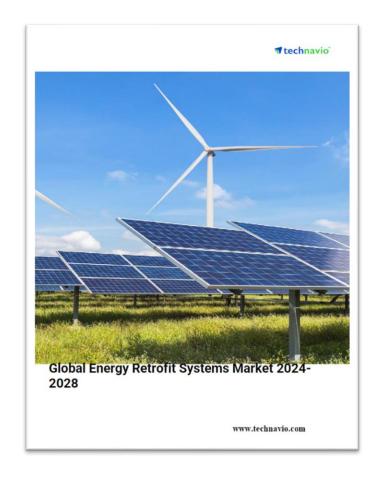




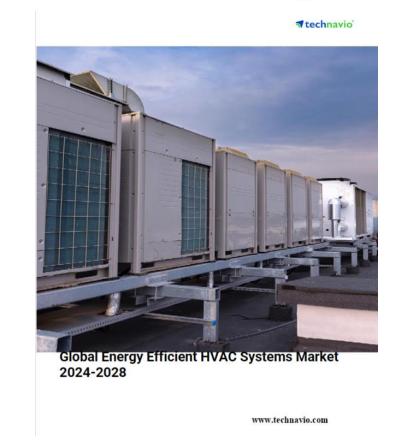


Technavio









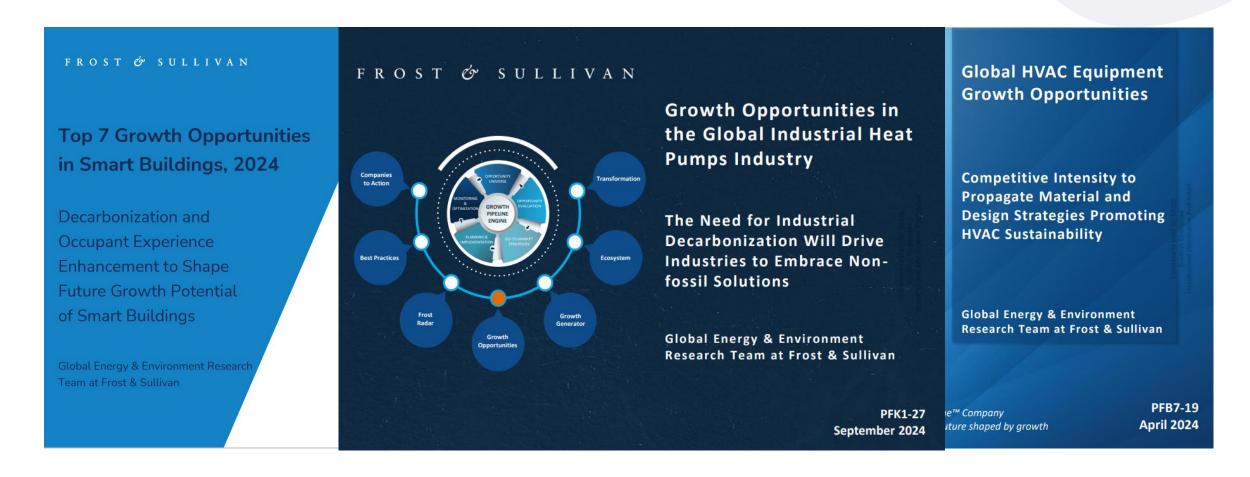
- Market Sizing
- Growth Projections
- Segmentation (by Product, Type, End User, Distribution)
- Geographic Segmentation

- Market Driver, Challenges & Trends
- Key Companies



Frost and Sullivan





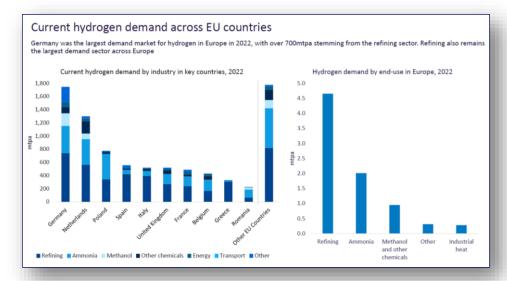
- Market Sizing
- Growth Projections
- Segmentation (by Product, Type, End User, Distribution)
- Geographic Segmentation

- Market Driver, Challenges & Trends
- Key Companies

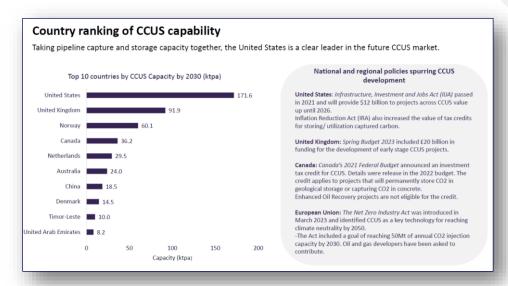


GlobalData Power





- Detailed information on Power Plants across Thermal, Nuclear, Wind, Solar, Hydropower, Biopower, Geothermal, and Ocean Power Technologies
- Historic and Forecast Information for Installed Capacity and Power Generation
- Data on Energy Storage Projects across Electrochemical, Electromechanical, and Thermal Technologies
- Information on Smart Grid Projects such as Smart Metering, SCADA, Microgrids, and EV Charging Infrastructure



- Information on Line and Substation Projects, and Transmission and Distribution Infrastructure at Country Level
- Coverage of Power Tenders and Contracts, including Tracking of Latest Tenders/Contracts Announced and Awarded by Industry, Country and Year
- Company Profiles with Key Related Market Data, Reports, Insights, and Deals
- Historical and Forecast Macroeconomic, Sociodemographic, and Sector Intelligence for over 193 Countries and 3000 Cities
- Real-Time Tracking of M&A Activity



Case Studies

RESEARCH CASE STUDY

Power Circle Projects Limited



Power Circle secured £120,000 from the Catalyst Fund. The investment will allow them to grow their team and respond to the increasing demand for its consultancy services. Here's how the research team helped:

Low Carbon Projects

Power Circle needed market intelligence to develop low carbon projects.

They requested information on electric cars, solar panels and the solar charging station market.

Subsequent research was conducted on Scottish property developers.

The Research Team provided:

- Information on the UK market for electric cars and solar panels
- List of Scottish property developers
- Global market size and outlook for solar charging stations

Enjoying Strong Growth

The market size and segmentation information provided by the research team contributed towards revenue growth.

The company also successfully used the research to secure external funding.

About Power Circle

Power Circle are a social enterprise dedicated to supporting social housing providers, private house owners, communities and the private sector to access affordable, low carbon energy by helping them to establish smart, local energy systems.

"The information has helped us position ourselves for the strong market growth we are currently enjoying. Do take a look and make use of this really valuable service"

John Cape, Managing Director



Typical Questions



List of key players /
owners / key
contractors in
offshore wind market
within Europe.

Size of the insulation market in UK-potential competitors and the market projections to 2030.

List of climate-tech trade shows

Global market size and forecast for the sustainable aviation fuel and details of companies involved in similar activity

Demand for off-grid homes in the Netherlands How many heat pumps have been installed in Spain?

Research Checklist



As well as the company name or telling us whether the research is for your own use, it's good practice to provide:

- ✓ As much detail as possible
- ✓ Where we should send the response
- ✓ Why the information is needed how will it be used?
- ✓ Your priority markets/countries (for more complex and larger requests)
- ✓ Timescales turnaround times are 3-5 working days so please highlight if you require information more urgently



Need Research? Contact Us!



Companies can contact us directly via:

- www.Scottish-Enterprise.com/ResearchService
- 0300 013 3385
- research@scotent.co.uk
- 121 video calls

Contact us to discuss your specific research needs.





Sustainability Specialists

Helping businesses to reduce costs and decarbonise





The Sustainability Specialist Team

- Team of seven sustainability Specialists covering the SE region of Scotland, from Aberdeen to the Central Belt.
- We have a mix of backgrounds and expertise, from renewables to carbon accounting, circular economy etc.
- I am one of two team members covering Glasgow and the West of Scotland.
- Team works with businesses across a range of functions.





SE Sustainability Specialist functions

Supporting businesses: online, one-to-one, workshops

Understand

- Net Zero, CE, offsetting etc

Review and analyse

- Environmental performance
- Efficiency and opportunities

Develop and implement

- Funding and projects
- Strategies
- Net Zero Action Plans

Specialist areas

Circular economy

Carbon footprinting and management plans

Environmental technology

Energy / resource efficiency

Renewable energy

EMS

Bioeconomy

Accreditation

Resources

Insights guides

Specialist knowledge

Impact Forecast

Net Zero Accelerator

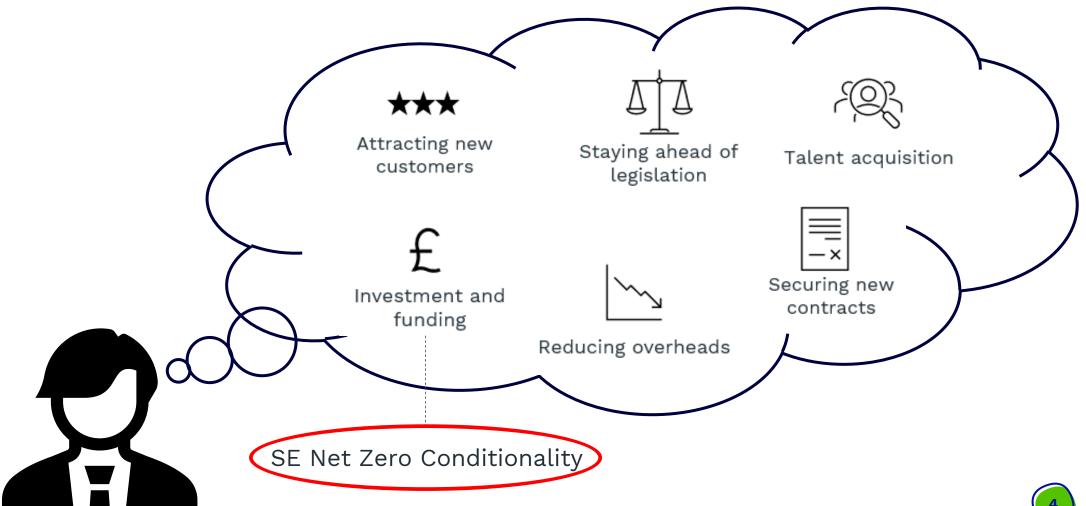
Renewable energy assessments

Net Zero Academy





Business benefits of net zero





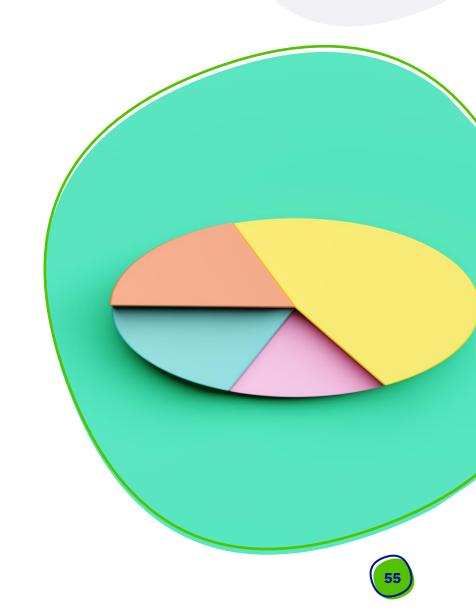
Net Zero Academy

A series of 5 in-person workshops.

Enables businesses to measure their carbon emissions and write a Net Zero Action Plan.

IEMA certification for delegates who pass exam.

- Understanding impact of climate change.
- Net Zero Terminology.
- Understanding scopes 1, 2 and 3.
- Gathering activity data.
- Converting data to CO₂e.
- Setting reduction targets.
- Info on verification and certification.





Low carbon energy feasibility assessments

The team can complete desktop assessments for suitable businesses using industry software (OnGen):

- Free and impartial
- Covers up to 10 different renewables assessment types
- Provides payback period, capital outlay and energy/carbon saving potential projections
- Enables businesses to engage directly with installers to progress project.

We currently have spare site audit credits, so are happy to engage with any business who could benefit from investigation into onsite renewables.





Financial support

- Feasibility work
 - Consultancy decarbonisation reports
 - Site energy reviews and optimisation audits
- Implementation support
 - Graduate placements / temp specialists etc
 - Putting feasibility into practice
- Capital assistance
 - New energy efficient equipment
 - Purchase of renewables







Get in touch.

Fraser.millar@scotent.co.uk Sustainability Specialist Glasgow and the West







Financial Readiness

Financial Readiness sits within **Growth Investments** which is the investment arm of Scottish Enterprise and was previously known as the **Scottish Investment Bank (SIB)**.

Financial Readiness is an **advisory service** providing **guidance and support** to businesses looking to **raise funding**.

Financial Readiness supports businesses on a pan Scotland basis including the geographical areas served by both Highlands and Islands Enterprise (HIE) and South of Scotland Enterprise (SOSE).

Working in partnership

Building strong partnerships between businesses and investors is key to securing Scotland's economic future.



Financial Readiness Support



Understand and quantify funding requirements

 Start up, growth, capex, acquisition, working capital, etc.

Guidance through funding options

- Equity, debt or a combination thereof.
- Although not grant specialists we can also signpost relevant grants.

Support to get investor/funder ready

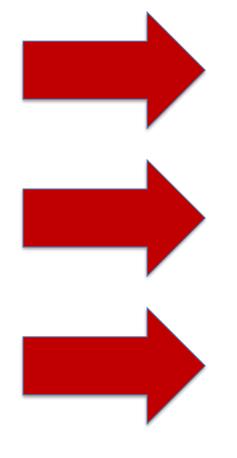
 Advice regarding funding documents (business plan, financial projections, pitch deck, etc).

Identify potential funders

 Based on business characteristics (sector, stage, etc) and funding requirements we can signpost potential funders.



Growth Investments



- Equity investment and/or loan funding
- Gap funding (identified requirement & shortfall)
- Equity co-investment alongside private sector
- Equity investment maximum 50% public sector
- Loan funding can be up to 100%
- SMEs with growth/export potential
- Significant operational presence in Scotland
- Economic benefit to Scotland
- Investments and loans on fully commercial terms.

Growth Investments Funds

Scottish Co-Investment Fund

- Equity investments of up to £2m
- Co-Invest alongside "Accredited Co-Investment Partners"
- Invest in start-up, early stage & established companies
- Accredited Co-Investment Partners source, diligence and negotiate deals

Scottish Venture Fund

- Equity investments of up to £2m
- Co-invest alongside a range of private sector investors
- Invest in start-up, early stage & established companies
- Investor led but Growth Investments involved in deal process

Scottish Loan Scheme

- Minimum loan £250k and maximum loan £2m
- Minimum two years trading, £250k turnover & profitable
- Can be up to 100% of funding requirement
- Viable businesses with ability to repay loans (not "soft" lending)

Team Contact Details

Jennie Brown (Specialist) - <u>jennie.brown@scotent.co.uk</u>

Anne Featherstone (Specialist) - <u>anne.featherstone@scotent.co.uk</u>

Yvonne McLaren-Robertson (Specialist) - yvonne.mclaren-robertson@scotent.co.uk

Laurence Jamieson (Team leader) - laurence.jamieson@scotent.co.uk

Martin Brechin (Specialist) - <u>martin.brechin@scotent.co.uk</u>

Jennifer Rafferty (Specialist) - <u>jennifer.rafferty@scotent.co.uk</u>

Graham Fiddes (Specialist) - graham.fiddes2@scotent.co.uk

Useful Links

Accessing Finance and Attracting Investment

Scottish Co-Investment Fund

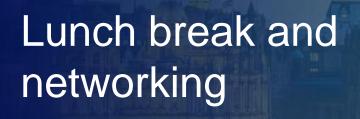
Scottish Venture Fund

Scottish Loan Scheme

Thank You Any Questions?







Clean Heat Accelerator

21st November 2024





Time	Topic
13:40 - 14:00	Welcome, introduction to the afternoon and speaker Sharon Hamilton, Head of Energy Transition Scottish Enterprise
14:00 – 15:45	Structured 1:1 networking Pre-arranged 1:1 speed-meetings with flexible networking
15:45 – 16:00	Wrap up and close
16:00 – 17:30	Refreshments and networking Opportunity to network Previous cohort members arrive, additional invitees who have contributed to accelerator Around 17:30 pub – Smokin' Fox





Welcome



Sharon Hamilton, Scottish Enterprise Head of Energy Transition





Intro to the cohort and the accelerator

- 14 clean heat SMEs from across the supply chain.
- Developing Growth plans... but growth in the sector is challenging.
- 5 months mentoring, 32 virtual and 3 in-person workshops





Clean Heat Accelerator



























Networking meetings



THE **HR** PRACTICE









ScottishPower





Clean Heat

Accelerator























21st November 2024

Thank you and next steps

Thank you everyone for participating



Cohort...

- Make the most of what is available to you; Clean Heat Expert Support
- Look forward to seeing progress over next year
- Stay in contact with each other
- Range of contacts still able to connect
- Resources available for next 12 months

Next accelerator early 2025







21st November 2024