State of the Sector 2022

Introduction

Data gathered from this survey will be shared in a UK-wide State of the Sector report to be published later in the year, alongside a separate state of the sector report for Wales funded by the Welsh Government. The report will highlight the achievements of the community energy sector in 2021, make a positive case for community energy and its role in the Net Zero transition, and play a crucial role in influencing government policy and other key sector decision makers.

The research aims to highlight the impact of the sector by investigating areas such as electricity and heat generation, energy storage, low carbon transport, and energy efficiency, as well as social benefit and community engagement reach. The data is crucial to the work of Community Energy England, Scotland and Wales. Our ability to effectively advocate for the sector and lobby for more supportive policies is reliant on the data you provide.

The survey will auto-save at the end of each page when you click on the 'Next' button, so if you don't have time to complete the survey in one sitting, please ensure you complete the page you are working on before exiting. When you return to complete the survey, you should ensure you use the same laptop/PC and browser you started it with so you can pick up where you left off.

For those who did not complete the survey last year, we are interested in gathering data which reflects how the sector is changing year on year, so we may ask you for some information pertaining to both 2020 and 2021 to provide a point of comparison.

We thank you for your time in completing the survey.

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Your data

Any personal data will be stored in accordance with UK General Data Protection Regulation and the Data Protection Act 2018 ('Data Protection Law'). We may share some detailed, but only non-sensitive data with other carefully vetted community energy research projects. We hope that this reduces the need for repeated research engagement and surveying of community energy organisations, in line with feedback we receive from practitioners in the sector.
If you have any questions or would like to discuss this before you start, please contact: victoria.mackay@communityenergyscotland.org.uk

* 1. Do you agree to this use of your data?

○ Yes

○ No

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Your organisation

We want to know where you are based, how long you have been active and how your organisation is

structured. This helps us compare the sector across national and regional boundaries and gives us insight into the types of legal structure that are best suited to deliver successful projects.

* 2. Your organisation's name

[   ]

* 3. Your name

[   ]

* 4. Your email address

[   ]

5. If applicable, please tell us the number of members in your organisation (including shareholders)

[   ]

6. If applicable, please tell us how many new full-time equivalent (FTE) jobs were created by your organisation in 2021?

[   ]

* 7. Did your organisation complete the State of the Sector survey last year?

○ Yes

○ No

○ Don't Know

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Your organisation

* 8. Organisation postcode

[   ]

9. What year was your organisation constituted?

[   ]

10. What is your organisation's legal structure?

- [ ] Charitable Incorporated Organisation (CIO) or Scottish Charitable Incorporated Organisation (SCIO)
- [ ] Charitable Trust
- [ ] Company Limited by Guarantee (CLG)
- [ ] Company Limited by Shares (CLS)
- [ ] Community Interest Company (CIC)
- [ ] Community Benefit Society
- [ ] Co-operative Society
- [ ] Limited Liability Partnership
- [ ] Informal (non-constituted)
- [ ] Other (please specify)

11. How many full time equivalent (FTE) staff does your organisation currently employ?

12. How many volunteers do you currently have?

Stalled Projects

* 13. Does your organisation have any projects currently on hold or stalled?

- ( ) Yes
- ( ) No
- ( ) Don't Know

14. What type of project is currently on hold or stalled? (select all that apply)

- ☐ Heat generation
- ☐ Electricity generation
- ☐ Low carbon transport
- ☐ Energy efficiency
- ☐ Demand side response/flexibility
- ☐ Energy Storage

Other (please specify)

[   ]

15. If applicable, what is the expected generation or storage capacity (kW) of your stalled project?

[   ]

16. What factors have been involved in causing your projects to stall? (select all that apply)

- ☐ Lack of feasibility funding and/or development funding
- ☐ Lack of organisational capacity
- ☐ High grid connection costs
- ☐ Public opposition to plans
- ☐ Difficulty securing planning permission
- ☐ Lack of expertise or technical knowledge
- ☐ Lack of access to suitable site
- ☐ Lack of accessibility of flexibility markets
- ☐ Lack of viable business model
- ☐ Inability to raise capital funding
- ☐ COVID-19
- ☐ Other (please specify)

[   ]

17. Have you begun developing any other new projects due to the stall?

○ Yes

○ No

If yes, please provide further detail e.g. project type, scale etc.

Barriers

We want to understand why community energy projects are not progressing and identify potential solutions which could be implemented to help the sector grow.

18. What are the greatest barriers to your organisation's community energy activities? (select all that apply)

☐ No significant barriers

☐ Lack of feasibility funding and/or development funding

☐ Lack of organisational capacity

☐ High grid connection costs

☐ Public opposition to plans

☐ Securing planning permission

☐ Lack of expertise or technical knowledge

☐ Lack of access to suitable site

☐ Lack of accessibility of flexibility markets

☐ Lack of viable business model

☐ Inability to raise capital funding

☐ Covid-19

Other (please specify)

19. What would help you overcome these barriers? (skip if not applicable)

- ☐ Early stage funding
- ☐ Lower grid connection costs
- ☐ Impartial expert support
- ☐ Time and capacity
- ☐ Better loan rates
- ☐ Assistance with recruiting volunteers
- ☐ Case studies/guidance with new business models
- ☐ Reduced planning complexity

20. Please tell us about any other mechanisms of support you would find helpful

[ ]

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Electricity Generation

* 21. Did your organisation provide details of your electricity generation activities in the State of the Sector survey last year?

- ○ Yes
- ○ No
- ○ Don't Know
- ○ My organisation does not generate electricity

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Renewable Electricity Generation

In this section, we want to understand how much renewable electricity capacity and generation the sector contibutes. How does this compares with previous years. Are electricity projects growing or stagnating and what might the reasons be?

When we refer to generating capacity (kW), we mean the maximum amount of electricity that your generator can produce at any given time. When we refer to electricity generation (kWh), we mean the actual amount of electricity that your installation has produced in the time period specified.

22. What type of electricity technologies has your organisation installed? (select all that apply)

☐ Wind

☐ Solar PV

☐ Hydro

☐ Other (please specify)

23. What is your organisation's total electricity generating capacity (kW) across all technologies?

24. How much electricity did your organisation generate (kWh) across all electricity generation projects in the 2020 calendar year?

25. Did your organisation install electricity generation technology in the 2021 calendar year?

○ Yes   ○ No

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Renewable Electricity Generation

26. Please provide the electricity generation capacity (kW) of any of the listed technologies installed by your organisation in the 2021 calendar year?

Solar

Wind

Hydro

Other

27. How much electricity did your organisation generate (kWh) across all electricity generation projects in the 2021 calendar year?

28. Please provide any further details about your organisation's electricity generation project(s) in the 2021 calendar year. (for new projects, we're interested in location (postcode), community ownership share (%), date of commissioning etc)

Renewable Heat Generation

29. Did your organisation provide details of your renewable heat generation activities in the State of the Sector survey last year?

○ Yes

○ No

○ Don't Know

○ My organisation does not reneweable heat

Renewable Heat Generation

In this section, we want to understand how much heat capacity the sector has and how much low carbon heat it produces. How does this compares with previous years? Are heat projects growing or stagnating and what might the reasons be?

When we refer to generating capacity (kW), we mean the maximum amount of heat that your generator can produce at any given time. When we refer to heat generation (kWh), we mean the actual amount of heat that your installation has produced in the time period specified.

30. What type of heat generation technologies has your organisation installed?

☐ Air source heat pump   ☐ Water source heat pump

☐ Biomass boiler   ☐ Solar Thermal

☐ Ground source heat pump   ☐ Other

31. What is your organisation's total heat generating capacity (kW) across all technologies?

32. How much heat did your organisation generate (kWh) across all heat generation projects in the 2020 calendar year?

[   ]

33. Did your organisation install new heat technology in the 2021 calendar year?

○ Yes

○ No

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Renewable Heat Generation

34. Please provide the heat generation capacity (kW) of any of the listed technologies installed by your organisation in the 2021 calendar year

Air-source heat pump   [   ]

Biomass boiler   [   ]

Water-source heat pump   [   ]

Ground-source heat pump   [   ]

Solar Thermal   [   ]

Other   [   ]

35. How much energy did your heat generation project(s) generate (kWh) across all technologies in the 2021 calendar year?

[   ]

36. Please provide any further details about your organisation's heat generation project(s) in the 2021 calendar year. (For new projects, we're interested in the location (postcode), community ownership share (%), date of commissioning etc)

[   ]

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Low Carbon Transport

* 37. Did your organisation provide details of your low carbon transport activities in the State of the Sector survey last year?

○ Yes

○ No

○ Don't Know

○ My organisation is not involved in low carbon transport activities

Low Carbon Tansport

38. What type of low carbon transport activities is your organisation involved in? (select all that apply)

☐ Electric transport

☐ Hydrogen transport

☐ Car sharing

☐ EV charging

☐ EV education/support

☐ E-bike

☐ Other (please specify)

[   ]

39. How many vehicles does your organisation own and/or manage?

[   ]

40. How many electric vehicle charging points has your organisation installed in total?

[   ]

41. Did your organisation purchase any vehicles or electric vehicle charging points in the 2021 calendar year?

○ Yes

○ No

Low Carbon Transport

42. Please tell us how many vehicles and/or electric vehicle charging points you purchased or installed in the 2021 calendar year

Vehicles purchased

Charge points purchased

43. Please provide any further details about your organisation's transport project(s) in the 2021 calendar year.

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Energy Storage & Flexibility

* 44. Did your organisation provide details of your energy storage and flexibility activities in the State of the Sector survey last year?

○ Yes

○ No

○ Don't Know

○ My organisation is not involved in energy storage or flexibility activities

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Energy Storage & Flexibility

In this section, we'd like to know what energy storage activities your organisation is involved in.

When we refer to energy storage capacity (kWh), we mean the size of the storage technology i.e. the maximum energy it can hold at any given time

45. What energy storage technology does your organisation currently have installed? (select all that apply)

☐ Electric battery

☐ Heat battery

☐ Hydrogen

Other (please specify)

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46. What is your organisation's energy storage capacity (kWh) across all energy storage technologies?

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47. Are you currently using or do you plan to use your energy storage to deliver network services (e.g. flexibility services, demand side response)

○ Yes

○ No

○ Don't Know

48. Have you been involved in a flexibility project or trial in the 2021 calendar year?

○ Yes

○ No

○ Don't Know

If yes, please provide details

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49. Did your organisation install any new energy storage or take part in flexibility activities in the 2021 calendar year?

○ Yes

○ No

Energy Storage & Flexibility

50. What was the energy storage capacity (kWh) of the energy storage technologies your organisation installed in the 2021 calendar year?

Electric battery	
Heat battery	
Hydrogen	
Other	

51. Please provide any further details about your organisation's energy storage/flexibility project(s) in the 2021 calendar year.

Energy Efficiency

* 52. Is your organisation involved in energy efficiency advisory services or improvement activities?

○ Yes

○ No

Energy Efficiency

53. Are the energy efficiency services your organisation provides...?

○ Free

○ Paid

○ Both

54. What type of energy efficiency activities does your organisation conduct? (select all that apply)

<table>
<tr><td>☐ Insulation</td><td>☐ Building assessments/audits</td></tr>
<tr><td>☐ Draught Proofing</td><td>☐ Energy monitoring</td></tr>
<tr><td>☐ Glazing refurb</td><td>☐ Funding advice</td></tr>
<tr><td>☐ Energy efficient lighting</td><td>☐ Fuel poverty reduction</td></tr>
<tr><td>☐ Workshops/cafes</td><td>☐ Advice/support to install renewable technologies</td></tr>
<tr><td>☐ Energy switching</td><td></td></tr>
</table>

Other (please specify)

[   ]

55. Please estimate the number of individuals engaged through your energy efficiency activities in the 2021 calendar year in terms of...

Fabric/building improvements

[   ]

Advisory and educational services

[   ]

56. Please estimate the total sum of money saved (£) for individuals / communities through your energy efficiency activities in the 2021 calendar year

[   ]

57. Please estimate the total organisational spend (£) in the 2021 calendar year in terms of…

Fabric/building improvements

[   ]

Energy efficiency advice and educational services

[   ]

Energy efficiency funding distributed

[   ]

58. If applicable, please tell us the number of recipients you distributed energy efficiency funding to in the 2021 calendar year

[   ]

59. Please provide any further details about your organisation's energy efficiency project(s) or services in the 2021 calendar year

[   ]

* 60. Does your organisation manage a community benefit fund?

○ Yes

○ No

Funding, Finance & Community Benefit Spending

These questions aim to understand how your community energy organisation funds its work, as well as any financial benefits that your projects and services provide to your community

61. What is the current value (£) of your organisation's community benefit fund

62. How much did you spend from your community benefit fund (£) in the 2021 calendar year?

63. Please tell us what your community benefit fund spending priorities were for the 2021 calendar year

☐ Low carbon technologies & educational activities

☐ Energy efficiency and tackling fuel poverty

☐ Promoting sustainable travel

☐ Local food growing and produce

☐ Reuse or recycling

Other (please specify)

64. What was your organisation's expenditure in the 2021 calendar year and what percentage of this do you estimate remained in your local area?

Expenditure

% remaining in local area

65. If applicable, please tell us how much development funding (£) your organisation received in 2021 from any of the sources listed below

Rural Community Energy Fund	
Welsh Government Energy Service	
London Community Energy Fund	
Low Carbon Across the South East	
BIG Lottery	
Power to Change	
Local Authority Funding	
INTERREG	
BEIS	
ERDF	
CARES	
Robert Owen Community Banking Fund	
Distribution Network Operator Funding	
Other	

66. Please tell us how much investment (£) for new projects your organisation secured in the 2021 calendar year via the pathways listed below (do not include refinanced loans)

Grants	
Self funding	
Community share offers	
Community bonds	
Loans	

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Engagement

67. Please estimate the number of individuals and/or organisations your organisation has directly supported in 2021

68. Is your engagement carried out bilingually?

○ Yes

○ No

○ Not applicable

69. Please tell us about the types of organisation you began new collaborations or partnerships with in 2021. These can be either formal or informal partnerships or collaborations (skip those that do not apply)

	Nature of partnership/collaboration
Distribution Network Operator	
Charity	
Property developer	
Housing association	
Business	
Academia (including schools)	
Local government	
Other community organisation	

Other (please specify)

70. Please rate the importance of any support your partner(s) or collaborator(s) contributed to the success of your project/activity (skip those that do not apply)

	Technical	Financial	Access to networks/info	Access to sites for renewable energy generation
DNO				
Charity				
Property developer				
Housing association				
Business				
Academia (including schools)				
Local government				
Other community organisation				

Please provide details of any other support not listed

71. In terms of the benefits listed below, how impactful do you consider your organisation's work to your community?

	Low impact	Moderate impact	High Impact	N/A
Capacity building and skills (including education)	○	○	○	○
Community ownership of assets/land	○	○	○	○
Developing local support for renewable energy	○	○	○	○
Reducing CO2 emissions	○	○	○	○
Reducing unsustainable land use practices	○	○	○	○
Local retention of community income	○	○	○	○
Alleviating fuel poverty	○	○	○	○

72. Please provide any further details on the benefits your organisation provides to your community

Diversity

73. Does your organisation have strategies in place to address and combat discrimination or prejudice on the basis of any of the following legally protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

○ Yes

○ No

○ Don't Know

74. Out of your board, employees and active volunteers, please estimate what percentage are...

Women	
Under 25 years old	
Over 60 years old	
Minority ethnic	
Disabled	
LGBT	

Future Plans

75. Do you have any projects planned for 2022 (select all that apply)

☐ Electricity generation

☐ Heat generation

☐ Energy Storage

☐ Low carbon transport

☐ Energy Efficiency

☐ Demand management/flexibility

☐ Local energy supply

Other (please specify)

[   ]

76. Please provide further information e.g. technology type, location, capacity (kW), date of commissioning etc

[   ]

77. Where do you see your organisation in the longer term? Tell us about any other project ideas you are considering developing

[   ]

78. Are there any other community energy projects that you know of that you think would make an interesting case study? Please provide details.

[   ]

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End of Survey

* 79. Are you happy to be contacted about the survey in the event of follow up questions?

○ Yes

○ No

80. Would you be interested in sharing your organisation's project story(s) as a case study in our final report or at a community energy event in future?

○ Yes

○ No

On behalf of the State of the Sector research team, thank you for taking the time to complete this survey.