

BESS Opportunity in Scotland

A MARKET-LED LOCATION FOR GRID-SCALE BESS ASSEMBLY

苏格兰的电池储能商机

市场化导向的电网级电池储能系统组装之地

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Think Scotland For Energy Transition

Key Content 主要内容

- Scotland Overview
苏格兰简介
- Scotland BESS Overview
苏格兰的电池储能产业
- Ecosystem Support From Scotland
苏格兰全生态系统的支持

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WHO ARE SDI?

苏格兰国际发展局

We are the international arm of Scottish Enterprise – Scotland's economic development agency. We aim to:

苏格兰国际发展局隶属于苏格兰工商委员会，是苏格兰政府下属的经济发展机构，致力于

- ✓ Grow Scotland's exports 苏格兰出口的增长
- ✓ Increase inward investment 招商引资

We achieve this via a missions' approach, to:

我们通过使命驱动来达成目标

- ✓ Create a world-leading energy industry by 2030
至2030年建立世界领先的能源产业
- ✓ Drive capital investment to increase productivity
通过资本投资来提升生产力
- ✓ Scale innovation to propel industries of the future
扩大创新能力，推动未来产业发展

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SCOTLAND'S BESS MARKET

苏格兰的电池储能市场



ENERGY TRANSITION 能源转型

SCOTTISH & UK TARGETS 苏格兰和英国的目标



NET ZERO BY 2050

2050年实现零排放

根据《气候变化法》确立具有法律约束力的承诺

DECARBONISED POWER
SYSTEM BY 2035:

到 2035年实现电力系统脱碳:

致力于实现一个完全脱碳的电力系统



CLEAN ELECTRICITY BY

2030s:

2030 年实现清洁电力:

95% 的电力供应来自低碳能源

OFFSHORE WIND TARGETS:

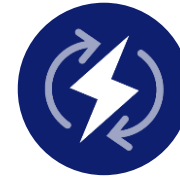
海上风电目标

到 2030 年达到 43–50GW, 包括
5GW 的浮式海上风电



UK WIDE TARGETS

SCOTLAND -SPECIFIC TARGETS



NET ZERO BY 2045

2045年实现净零排放:

比英国早五年

100% RENEWABLE
ELECTRICITY EQUIVALENT

100% 可再生电力当量:

自 2020 年起已实现



50% OF ENERGY FROM
RENEWABLES BY 2030

到 2030 年50%的能源来自可 再生能源:

覆盖电力、供热和交通领域

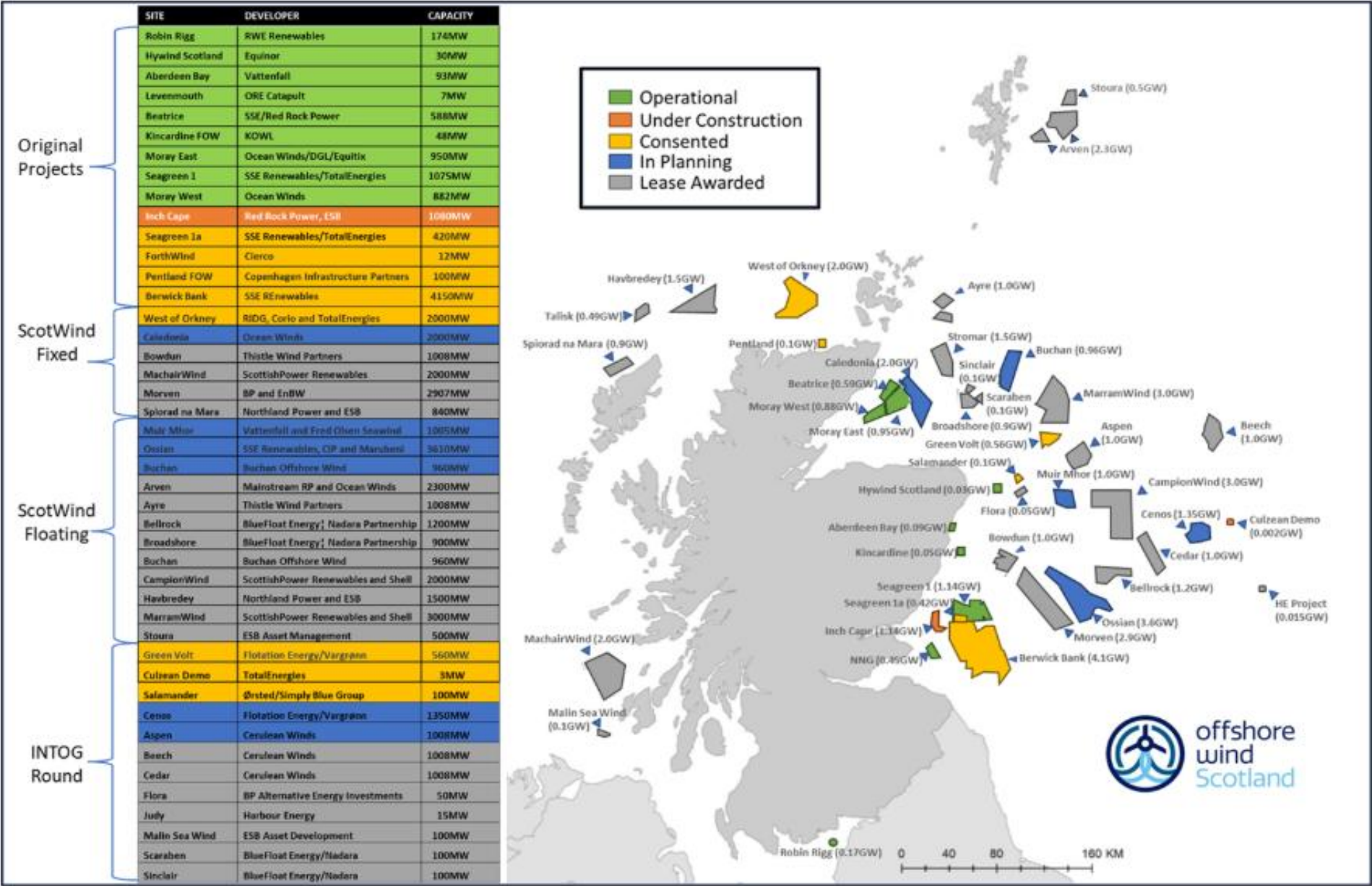
OFFSHORE WIND TARGETS:

海上风电目标

- 2030年运营和获批海上风电项目达
11GW
- 2045年再增加28GW



OFFSHORE WIND PROJECTS IN SCOTLAND 苏格兰海上风电项目



ENERGY STORAGE

AS CRITICAL NATIONAL INFRASTRUCTURE

储能-国家关键基础设施

Energy storage is explicitly recognised by government as critical infrastructure required to stabilise a renewables-heavy power system and fully realise our clean energy potential. This is reinforced by substantial, long-term public investment:

政府已明确将储能认定为关键基础设施，以稳定可再生能源为主的电力系统、并充分实现清洁能源的潜力。公共领域长期且规模化的投资也加强储能来的发展

£150 million committed to offshore-wind aligned INFRASTRUCTURE AND SUPPLY CHAINS, supporting storage-enabled delivery and leveraging private investment

已承诺 1.5 亿英镑 用于与海上风电相配套的基础设施和供应链建设，支持储能项目交付，并带入私人投资

£500 million multi-year commitment to PORTS, MANUFACTURING LOCATIONS AND NET-ZERO INDUSTRIAL CLUSTERS that storage developers rely on

承诺 5 亿英镑 的多年期资金，用于港口、制造基地以及净零工业集群建设，这些均是储能开发商所依赖的关键基础条件

Clear UK policy support , including the LDES CAP-AND-FLOOR SCHEME, designed to unlock renewables-linked long-duration energy storage projects

英国层面明确的政策支持，包括长时储能（LDES）“上限—下限（Cap-and-Floor）机制”，旨在推动与可再生能源相关的长时储能项目落地

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PLANNING GUIDANCE FOR BESS IN SCOTLAND

苏格兰BESS规划指南

Battery Energy Storage Systems (BESS) will play an important role in Scotland's transition towards a low-carbon, resilient, and efficient energy system. Through enabling the integration of renewable energy and supporting grid stability, BESS development can contribute to achieving national ambitions for renewable energy deployment and addressing climate change.

电池储能系统（BESS）将在苏格兰建立低碳、高灵活性以及高效的能源系统转型过程中发挥重要作用。通过促进可再生能源的接入与整合，并支撑电网稳定性，BESS 的发展能够助力实现国家在可再生能源部署方面的目标，同时推动应对气候变化的整体进程。

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Planning Guidance:

**Battery Energy Storage
Systems**

March 2026

 Scottish Government
Riaghaltas na h-Alba

 **SCOTLAND**

BESS PLANNING AND DETERMINING

苏格兰BESS项目的规划审批

The process for making and determining applications for Battery Energy Storage Systems (BESS) can vary depending on the scale, location, and nature of development.

电池储能系统（BESS）项目的申请和审批流程，会根据项目的规模、选址及开发性质而有所不同：

- Local Authorities – Responsible for preparing Local Development Plans and determine planning applications for BESS developments of 50MW or less;

地方政府 - 负责制定地方发展规划，并审批装机容量 50MW 及以下的 BESS 项目；

- Scottish Ministers – Determine applications for BESS development of over 50MW . The process of assessing and determining applications is administered by the Energy Consents Unit on behalf of Scottish Ministers.

苏格兰部长 - 负责审批 超过50MW 的 BESS 项目。相关申请的评估与审批流程由能源许可部门（Energy Consents Unit）代表苏格兰部长进行管理；

- Planning & Environmental Appeals Division (DPEA) – On behalf of Scottish Ministers, the DPEA independently considers and determines appeals against planning decisions by Local Authorities, report to Ministers on called in applications

规划与环境上诉委员会 - 代表苏格兰部长，独立审理针对地方政府规划决定提出的上诉，并就被收回审查的申请向部长提交报告；

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STRONG PIPELINE OF CONSENTED AND OPERATIONAL PROJECTS

已获批和运营的BESS项目

- 至2025年12月苏格兰在运营的电网级BESS容量接近 **0.5GW**
- 2025年7月前获得许可的项目激增至 **18.2GW**, 而六个月之前仅有 13.5GW
- 接近 **6GW** 正在建设 = 苏格兰拥有英国整体BESS建设项目的 **27%**
- 至**2030**苏格兰运营的BESS 容量年预计将从 0.5GW 增加到 **7.5GW**

RECENT CONSENTS 近期获得许可的项目包括:



300MW

Mosmorran
(Fife)



300MW

Kintore
(Aberdeenshire)



900MW

Perth and
Kinross



700MW

Aunchetiber
(Inverclyde)

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KEY PROJECTS

主要项目

Eelpower Energy 与国家财富基金 (NWF) 联合体

- 由Eelpower, Equitix, Aware Super (Australia), 和 NWF共同开发
- £5 亿英镑的英国电池储能投资平台
- 苏格兰大型 BESS 项目的首轮部署, 初期3个项目于近300MW/h, 2025年底达到1GW

Field & Envision Energy 合作项目

- 两个50MW/100MWh电网级 BESS 项目, 预计于 2026 年底前建成并投运
- 采用 LFP (磷酸铁锂) 集装箱式电池系统

Blackhillock (阿伯丁郡)

- 欧洲目前规模最大的在运 BESS项目
- 装机规模 200MW, 扩容至 300MW

Hunterston 液态空气储能项目 (LAES)

- 苏格兰有望建设全球最大的液态空气储能项目: 2.5GW
- 目前处于规划与开发后期阶段, 获得苏格兰政府支持



SCOTLAND

GRID-SCALE STORAGE 苏格兰电网级储能机遇

ACTIVE DEPLOYMENT 积极部署

- One of Europe's fastest-growing BESS markets 苏格兰是欧洲增长最快的 BESS 市场之一
- In May 2025 alone, Scotland approved 905MW of BESS across Fife, Aberdeenshire and Midlothian, signalling unmatched near-term opportunity.
- 仅在 2025 年 5 月，苏格兰就在法夫（Fife）、阿伯丁郡（Aberdeenshire）和米德洛锡安（Midlothian）批准了 905MW 的 BESS 项目，释放出极其突出的短期市场机遇。
- Recent planning approvals signal strong delivery momentum, not speculative development
- 近期的规划审批体现出强劲的项目交付动能，而非投机性开发
- Strong concentration of projects in areas of high renewable generation and grid constraint.
- 项目高度集中于可再生能源发电密集、且电网受限的区域
- Already home to active projects from key developers e.g. Zenobē Energy, Apatura, ESB Scotland, OnPath Energy, CIP and EDF
- 苏格兰已拥有来自多家核心开发商的在运项目，例如 Zenobē Energy、Apatura、ESB Scotland、OnPath Energy、CIP 和 EDF

INVESTMENT & GRID ENABLERS 投资与电网支撑条件

- Projects progressing through planning and delivery, supported by clear precedent and grid upgrade programmes
- 依托成熟先例及电网升级计划，各个项目正稳步推进规划和实施落地
- £20bn+ committed grid investment this decade 近十年已承诺200 +亿英镑的电网投资
- New 400kV substations, HVDC links and reinforcements 新建 400kV 变电站、HVDC线路及电网加固工程

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Enabling onshore and offshore wind at scale 实现陆上与海上风电的大规模接入

- Enabling power flows across the UK and Europe 支撑跨英国乃至欧洲的电力输送



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GROWING ENGAGEMENT FROM

CHINESE BESS COMPANIES IN SCOTLAND

越来越多的中国储能企业进入苏格兰市场

SUNGROW



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FROM MARKET DEMAND TO LOCAL ASSEMBLY 从市场需求到本地化组装

Scotland combines strong market pull with practical manufacturing conditions that support grid-scale BESS assembly close to deployment, reducing risk and improving costs versus remote assembly locations.

- ESTABLISHED ENERGY AND POWER-SYSTEMS MANUFACTURING BASE – providing relevant skills and suppliers for BESS assembly
- CLEAR FIRST-MOVER LOCALISATION OPPORTUNITY – limited existing BESS assembly capacity, offering first entrants space to establish local footprint
- SHORTENED SUPPLY CHAINS – assembly close to wind landfall points and substations reduces transport complexity and delivery risk
- EARLY ADVANTAGE AS MARKET SCALES – embed relationships with developers and EPCs

苏格兰将强劲的市场拉动力与可行的制造条件相结合，支持企业在苏格兰部署本地化电网级 BESS 组装厂，相比远距离组装，显著降低风险并优化成本结构。

- **成熟的能源与电力系统制造基础：**为 BESS 组装提供技能体与供应商
- **提前布局本地化生产抢占商机：**现有 BESS 组装产能有限，率先进入者优先布局
- **缩短供应链环节：**靠近风电登陆点和变电站，减少运输复杂性并降低交付风险
- **市场规模化前已具有先发优势：**提前与开发商及 EPC 建立深度合作关系



END-TO-END HIGH VALUE 全流程高附加值制造供应链及延伸产业

MANUFACTURING SUPPLY CHAIN AND BEYOND

WITH A COMPACT AND WELL-CONNECTED GEOGRAPHY, SCOTLAND OFFERS:
凭借紧凑且高度互联的地理条件，苏格兰可以提供上中下游的条件：



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SCOTLAND'S BATTERY LANDSCAPE 苏格兰电池产业

BATTERY MANUFACTURERS 电池制造

Scotland benefits from a pool of highly innovative commercial businesses which are already active in the energy storage sector and have huge partnership potential for battery recycling players to come in.

苏格兰拥有一批高度创新的商业企业，这些企业已经活跃于能源储存领域，并为电池回收相关企业的进入提供了巨大的合作潜力

MEP Technologies
Battery Systems & Support

INVINITY
ENERGY SYSTEMS

DENCHI

LionVolt



WASTE BATTERY COLLECTION 电池回收

Currently, there are four approved treatment operators and exporters registered in Scotland. There are **no processing and treatment facilities in Scotland to recycle batteries at end-of-life** 苏格兰共有 4 家获批的处理运营商和出口商。苏格兰尚未建成任何用于报废电池回收处理的本地加工和处理设施



JET
Environmental



INNOVATIVE RECYCLING SOLUTIONS

BATTERY RECYCLING 废旧电池循环利用

Majority of waste batteries which are collected in Scotland are transported to England for sorting by chemistry type. Three of the main sorting operators in the UK:

目前在苏格兰收集的大多数废旧电池，都会被运送至英格兰，按照电池化学类型进行分类处理



ecobat



Scotland offers a unique strategic opportunity to become part of our evolving battery supply chain

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HIGH VALUE AND ADVANCED MANUFACTURING SUPPORT

高价值的先进制造实力

SCOTLAND IS COMMITTED TO BECOMING A GLOBAL LEADER IN HIGH VALUE AND ADVANCED MANUFACTURING. Advanced manufacturing will play a key role in Scotland's energy transition, **reducing emissions by increasing efficiency and innovation.**

苏格兰致力于成为全球高附加值和先进制造领域的领先者。先进制造将在苏格兰能源转型中发挥关键作用，通过提升效率 and 创新能力实现减排目标。



A network of world-class manufacturing R&D facilities that accelerate productivity, skills, and sustainability in Scotland and beyond, including:

苏格兰国家制造中心: 构建由世界一流制造业研发机构组成的网络，加速苏格兰及更广范围内的生产效率、技能提升与可持续发展



Advanced Forming Research Centre
先进成型研究中心



Lightweight Manufacturing Centre
轻量化制造中心



Digital Factory & Smart
Manufacturing
数字工厂和智能制造



Manufacturing Skills Academy
制造业人才培养



Offers practical support, expert advice and training on new manufacturing processes and technology to improve productivity, efficiency, and competitiveness

苏格兰制造业咨询服务中心: 提供有关新制造工艺和技术的实践支持、专家建议与培训，以提升生产率、效率和竞争力

DON'T JUST TAKE OUR WORD FOR IT

NMIS collaborated with German lightweighting specialists TGM Lightweight Solutions to design a car battery concept that can reduce weight, production costs and vehicle CO₂ emissions, while providing an improved battery life expectancy, without compromising on power.

NMIS 与德国轻量化领域专家 TGM Lightweight Solutions 合作设计了一种汽车电池概念，在不牺牲功率性能的前提下，实现了减重、降低生产成本并减少车辆 CO₂ 排放，同时提升了电池的使用寿命。



TGM worked with NMIS across all stages of concept creation including design analysis, weight reduction optimisation, method of manufacturing assessment and overall cost estimation.

TGM 与 NMIS 在概念创建的各个阶段开展合作，包括设计分析、减重优化、制造方法评估以及整体成本测算。

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POWERING PROGRESS BY INNOVATION 创新赋能发展

Leading institutions and applied innovation centres support:

- Collaboration with industry
- Practical testing and system integration
- Exploration of next-generation energy storage technologies

Alongside near-term BESS assembly and deployment, Scotland can act as a testbed for future innovation, grounded in real-world system need.

苏格兰领先的高校机构和应用型创新中心提供：

- 与产业界的协同合作
- 实际场景下的测试与系统集成
- 对下一代储能技术的探索

在提供BESS 组装场地和项目的同时，苏格兰还可作为未来创新的试验场，以真实世界的电力系统需求为基础，推动前沿技术的发展。



WORLD-CLASS RESEARCH & DEVELOPMENT OPPORTUNITIES 研发机构
COLIN VINCENT CENTRE FOR BATTERY TECHNOLOGY 科林·文森特电池技术中心



INNOVATION IN ACTION

- Industry-led battery innovation R&D facility at the University of St Andrews to bridges academia and industry
- Accelerates innovation and de-risk scale-up
- Leading-edge facilities for advanced cell development:
 - Ultra-low humidity dry lab (first in Scotland)
 - Flexible pouch cell production line
 - Roll-to-roll calendaring, Z-fold stacking, ultrasonic welding
- 圣安德鲁斯大学下设的基于产业应用的电池创新研究中心。
- 帮助企业加快创新进程、降低研发风险
- 先进的设施条件，为高敏感化学体系和高精度制造提供最佳环境：
 - 120 平方米超低湿度干燥实验室（苏格兰首个）
 - 高度灵活的软包电芯生产线
 - 卷对卷压延、Z 型折叠叠片、超声波焊接

IDEAL COLLABORATION PARTNER 理想的合作伙伴

You'll benefit from:

- ✓ Faster validation of new chemistries
- ✓ Reduced development risk
- ✓ Direct access to Scotland's battery innovation ecosystem

您将受益于：

- 更快完成新化学体系的验证
- 降低技术开发与产业化风险
- 直接接入苏格兰电池创新生态体系



案例研究：Titanvolt 与 Grinergy

新一代 LTO 软包电芯技术验证Titanvolt 与 CVCBT 的开创性合作，成功验证了一种全新的钛酸锂（LTO）软包电池技术，标志着在安全、可持续能源存储领域取得了重要进展。

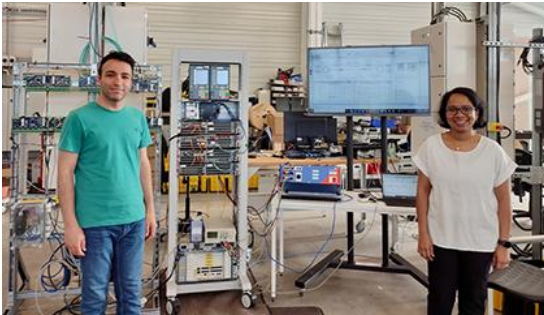
该软包电池由韩国领先的电池制造商 Grinergy 开发，并由 Titanvolt 推向市场，具备一系列突出的优势：无起火风险，显著提升不同应用场景下的安全性；相较传统电池类型具有更高的能源效率；95% 的可回收性，有力支撑循环经济目标

该项目得到苏格兰外来投资催化基金的支持；该基金由 Interface 与苏格兰政府支持，旨在通过学术界与产业界之间的战略合作，加速创新进程。

POWER NETWORKS DEMONSTRATION CENTRE (PNDC) 电力网络示范中心

REAL-WORLD TESTING 真实场景测试

- One of the University of Strathclyde's renowned industry-facing innovation centres
 - Whole energy systems research, test and demonstration facility
 - Grid-connected, real-world testing environment
 - Focus on the de-risking and acceleration of novel electricity, heat and transport systems
 - Supports battery systems, energy storage and power electronics
 - Advanced capabilities:
 - Controlled testing of grid-scale and distributed storage
 - Performance, safety and lifecycle optimisation
 - Data-driven monitoring and analytics
- **Strathclyde大学旗下、面向产业的知名创新中心之一**
- **覆盖整体能源系统的研究、测试与示范设施**
- **与电网直接相连的真实运行测试环境**
- **聚焦新型电力、供热和交通系统的风险降低与加速落地**
- **支持电池系统、能源储存和电力电子技术**
- **先进能力包括：**
- 对电网级和分布式储能的可控测试
 - 性能、安全性及全生命周期优化
 - 基于数据的监测与分析能力



IDEAL COLLABORATION PARTNER 理想的合作伙伴

Key benefits:

- ✓ Validate battery performance under live grid conditions
- ✓ De-risk deployment of storage technologies at scale
- ✓ Test integration with renewables, smart grids and power networks
- ✓ Faster route from development to deployment
- ✓ Reduced technical and operational risk
- ✓ Direct link to Scotland's renewables-led energy system

核心优势：

- 在真实电网条件下验证电池性能
- 降低储能技术规模化部署风险
- 测试与可再生能源、智能电网和电力网络的集成
- 从研发到部署的更快捷路径
- 降低技术和运营层面的风险
- 与以可再生能源为主导的苏格兰能源系统直接对接

FINANCIAL SUPPORT 资金支持

We can help you to: 我们可以协助:



Find the most appropriate funding route for your company
为企业寻找最合适的融资路径



Navigate public sector funding sources - understand criteria and government regulations for both Scottish and UK-based schemes
理解并对接公共部门资金来源——清晰掌握苏格兰及英国层面各类项目的准入条件和政府监管要求



Access a range of partners, networks and funders – allowing us to leverage Scotland's assets
对接多元合作伙伴、网络和资金来源——充分发挥苏格兰的综合资源优势

Work through the appraisal and approval process 推进评估与审批流程



CAPITAL GRANT 资本补贴

- Encourages company investment in **capital equipment** or other fixed assets
- **Intervention rates:** up to 20% for large companies, up to 30% for medium companies and up to 40% for small companies
- **Maximum award** value of **£15,000,000** per beneficiary per project
- **Eligible activities and costs** include fixed capital costs, such as land, site preparation, buildings, and machinery
- 鼓励企业在资本设备或其他固定资产方面进行投资
- 支持比例：大型企业最高20%，中型企业最高30%，小型企业最高40%
- 每个受益方/每个项目的最高补助金额为一千五百万英镑
- 符合条件的活动和成本包括土地、场地准备、建筑物及设备固定资本性支出

CO-INVESTMENT 共同投资

- [The Scottish National Investment Bank](#) – the UK's first mission-led development bank is backed by £2 billion from the Scottish Government over ten years, providing **equity and debt finance** to support projects aligned to long-term, sustainable growth.
- **SNIB typically invests £1m+ in businesses** with a connection to, or plans to locate in, Scotland, tailoring finance to specific requirements and investment structure of each opportunity.
- 苏格兰国家投资银行 (SNIB) 作为英国首家使命导向型发展银行, SNIB 获得苏格兰政府 10 年期共20亿英镑资金支持, 通过股权和债务融资方式, 支持符合长期可持续增长目标的项目。
- SNIB通常在企业中的投资规模为100+万英镑, 重点支持与苏格兰有关联、或计划在苏格兰落地的企业, 并根据具体项目需求与投资结构提供定制化融资方案。

TRAINING 培训支持

- Support to locate in Scotland, plan your workforce and attract the right talent for growth.
- Advice on **organisational design, workforce development, recruitment strategies, and creating attractive, flexible workplaces, fair work practices.**
- We can work with Jinko to deliver bespoke funding models to help finance skills and recruitment. For example, apprentice funding or funding for the recruitment of disadvantaged workers
- 支持企业在苏格兰落地、开展劳动力规划并吸引适合增长需求的人才
- 提供关于组织架构设计、劳动力发展、招聘策略, 以及打造具有吸引力和灵活性的工作环境与公平工作实践方面的建议

THE SKILLS YOU NEED TO SUCCEED

SCOTLAND'S SKILLS LANDSCAPE 苏格兰人才技能

5.5m

Scotland's national population
苏格兰的人口数量



154,060

people currently working in
engineering and manufacturing
从事工程与制造业的人口数量



69,000

people are directly employed in
Scotland's energy sector
苏格兰能源行业的从业人



8,700

people work in Scotland's chemical sciences
sector, including chemical engineering
正在苏格兰大学攻读工程与技术
相关资格的学员



19

universities and a strong college network producing
STEM graduates and offering industry-led training
for advanced manufacturing and battery
technologies 19 所大学及完善的学院网络，持续培养 STEM 专业毕业
生，并提供以产业需求为导向的先进制造和电池技术培训



20,370

students are studying
engineering and technology
qualifications at Scottish
universities

2023/24 学年 于继续教育
学院学习工程类课程

FUNDED INDUSTRY-LED APPRENTICESHIPS 政府资助的、行业主导的学徒制项目

- ✓ Fast-tracked talent development at all levels
- ✓ Reduced training costs
- ✓ Increased productivity and retention
- ✓ 各层级人才的快速培养
- ✓ 降低培训成本
- ✓ 提升生产效率与员工留存率



14,032

students are studying
engineering courses at
further education colleges
in 2023/24
在苏格兰大学学习工程与
技术相关专业



ENERGY HERITAGE = TRANSFERABLE SKILLS FOR BESS

Scotland has the talent you need – Scotland's **oil & gas heritage** provides a deep pool of talent in **chemicals, process engineering, and precision manufacturing**, all highly transferable to battery storage assembly.

苏格兰具备您所需的人才基础 —— 苏格兰深厚的 油气产业传承，造就了在化学工程、流程工程和精密制造领域经验丰富的人才，这些技能均可高度迁移至电池储能系统（BESS）组装领域。

ONGOING BUSINESS SUPPORT SDI为企业提供持续的支持

We offer tailored, free and confidential advice and services to help you make the right decisions to embed and establish your company in Scotland.

我们提供量身定制的，免费的，保密建议和服务，协助公司做出在苏格兰落地和成立公司的正确决策。



One-stop-shop services

- Planning a fact-finding visit to Scotland
- Helping you find the right property
- Exploring development opportunities
- Financial support – tax reliefs, financial incentives, grants, equity and loans
- Recruitment assistance and training & support
- Building your profile, and showcasing your business
- On-going Account Management Support



一站式服务

- 计划对苏格兰进行实况调查访问
- 帮助寻找合适的房产
- 探索发展机会
- 财务支持 - 税收减免，财务奖励，政府补助，股权和贷款
- 协助员工招聘和培训与支持
- 建立公司的业务简介，并推广公司业务
- 持续的客户经理管理支持



NOW IS THE TIME TO INVEST IN SCOTLAND



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苏格兰国际发展局

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