Fred. Olsen Renewables

Fred. Olsen Renewables' Crystal Rig IV Supply Chain Impact

Delivering lasting value in South East Scotland

fredolsenrenewables.com

Foreword

At Fred. Olsen Renewables, we take a long-term view. As a family-owned company, our focus has always been on building lasting relationships and delivering projects that create value over time — for local communities, for partners, and for the regions in which we operate.

In the Southeast of Scotland, this means contributing to sustained investment, supporting jobs, and working in close partnership with local authorities and businesses. Crystal Rig is an important part of that story, and the experience gained here continues to shape our approach to development and delivery.

The Crystal Rig IV supply chain analysis provides a clear picture of the economic contribution associated with this project. It highlights that over £5 million of spend has been retained within the local area, alongside further millions supporting activity across Scotland in areas such as transport, port operations, accommodation, and engineering support.

At the same time, it is important to be transparent about the role of international supply chains. Certain specialist components are sourced from outside Scotland and the UK, reflecting the current structure of the wind sector. However, this does not diminish the local impact. As the analysis shows, significant value is still created and retained locally, and there are meaningful opportunities for Scottish businesses throughout the project lifecycle.

For us, this is an important point. Projects like Crystal Rig demonstrate that even within a global industry, there is strong potential to support regional economies and build local capability.

Looking ahead, the decommissioning and repowering of Crystal Rig will mark the next phase. This will require a refreshed and evolving supply chain, creating opportunities across construction, logistics, engineering, and operations. We are committed to engaging early, working openly with suppliers, and ensuring that local businesses are well placed to take part.

We encourage organisations that are interested in contributing to this next phase to engage with us as these plans develop.

Ottar Kristian Alme
Project Director: Construction

Total Capital Expenditure included

£5.3 million
in South East Scotland

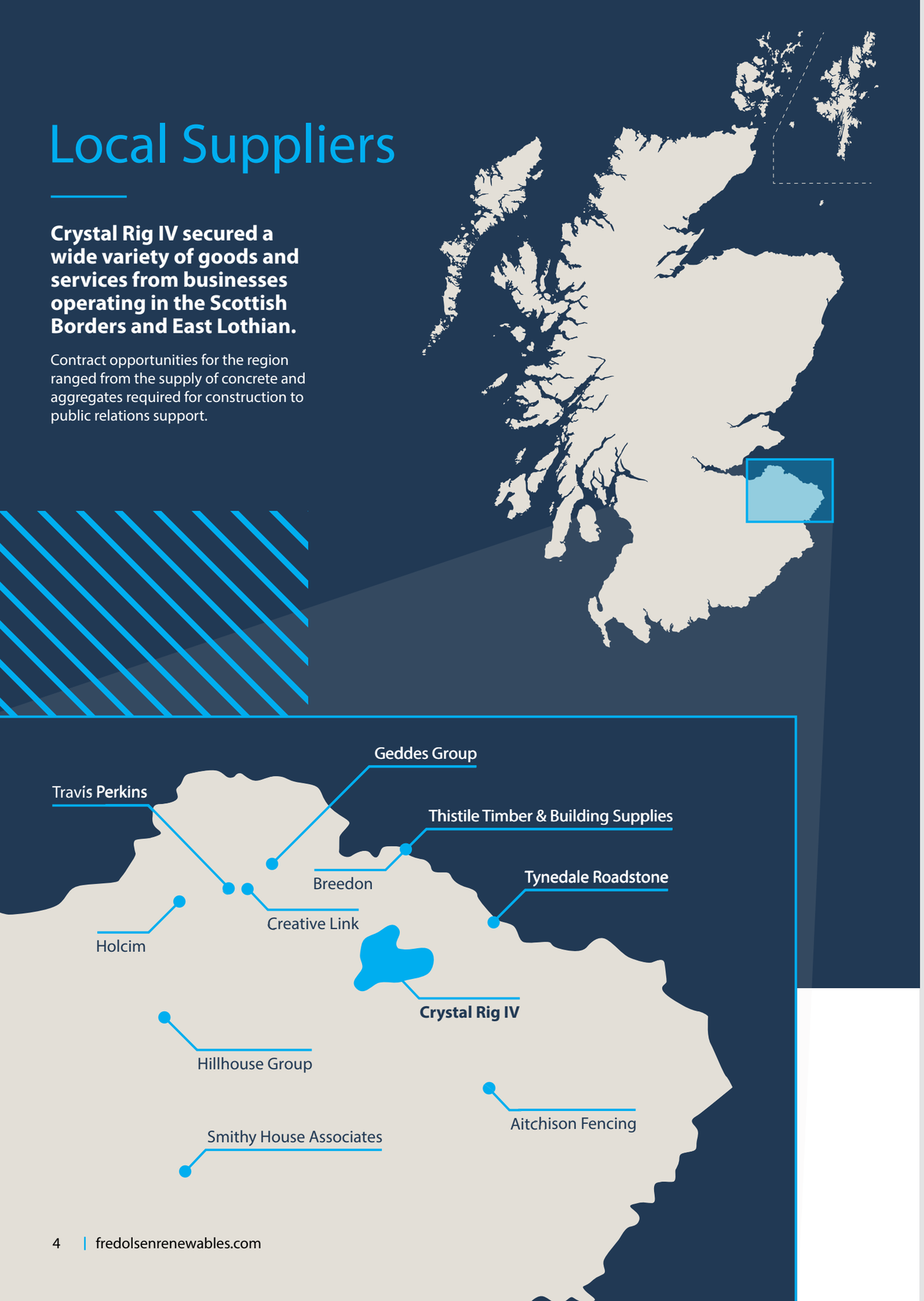
£18.5 million
in Scotland

£22.7 million
in the UK

Local Suppliers

Crystal Rig IV secured a wide variety of goods and services from businesses operating in the Scottish Borders and East Lothian.

Contract opportunities for the region ranged from the supply of concrete and aggregates required for construction to public relations support.



Economic Impact Summary

Crystal Rig IV is an onshore wind farm extension located in the Lammermuir Hills in the Scottish Borders.

The development features 11 turbines, with a total installed capacity of up to 48.2MW. Through this project, Fred. Olsen Renewables stimulated economic impact locally in South East Scotland, as well as across Scotland and the UK.

Through supply chain spending, Crystal Rig IV generated:

In South East Scotland

£4.8 million GVA

85 years of employment

In Scotland

£19.6 million GVA

275 years of employment

In the UK

£35.5 million GVA

485 years of employment

Regional Economic Impact

Fred. Olsen Renewables is committed to maximising local economic benefits through expenditure in the supply chain.

With the existing Crystal Rig Wind Farm, and two further extensions, already in operation, this gave the developer a vital understanding of the local economy and how regional impact could be delivered.

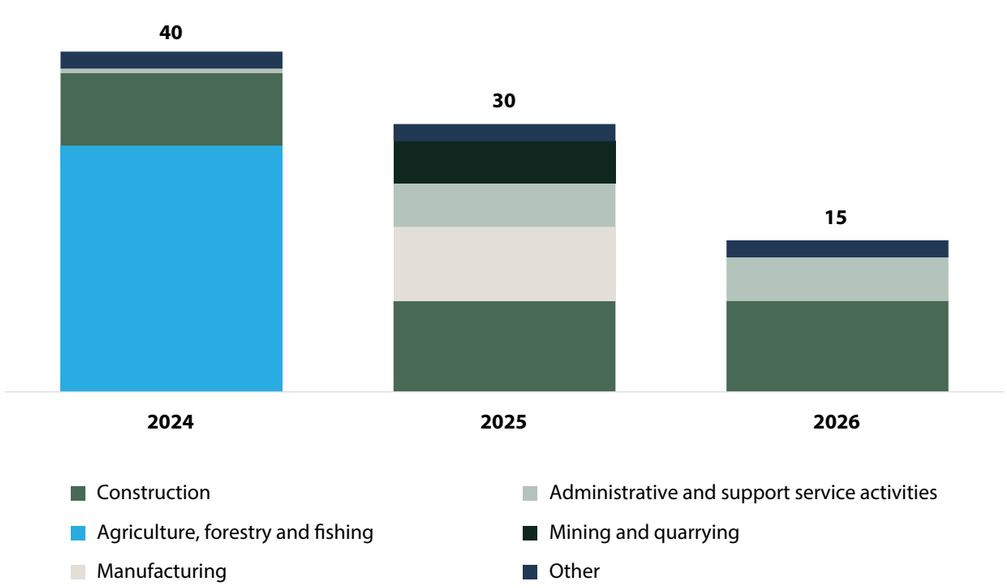
Major sectoral benefits of Crystal Rig IV included:

- £1.7 million in spending to regional companies in the civil engineering and construction sector;
- £1.5 million in to companies in administrative and support services; and
- Over £0.2 million on accommodation, focused in the local area around the project.

In total, the construction phase of Crystal Rig IV delivered £5.3 million in expenditure to businesses and workers based in South East Scotland. This generated:

- £4.8 million GVA and 85 years of employment, peaking at 40 jobs in 2024.

Crystal Rig IV South East Scotland Jobs Over Time



Annual Activity in Context

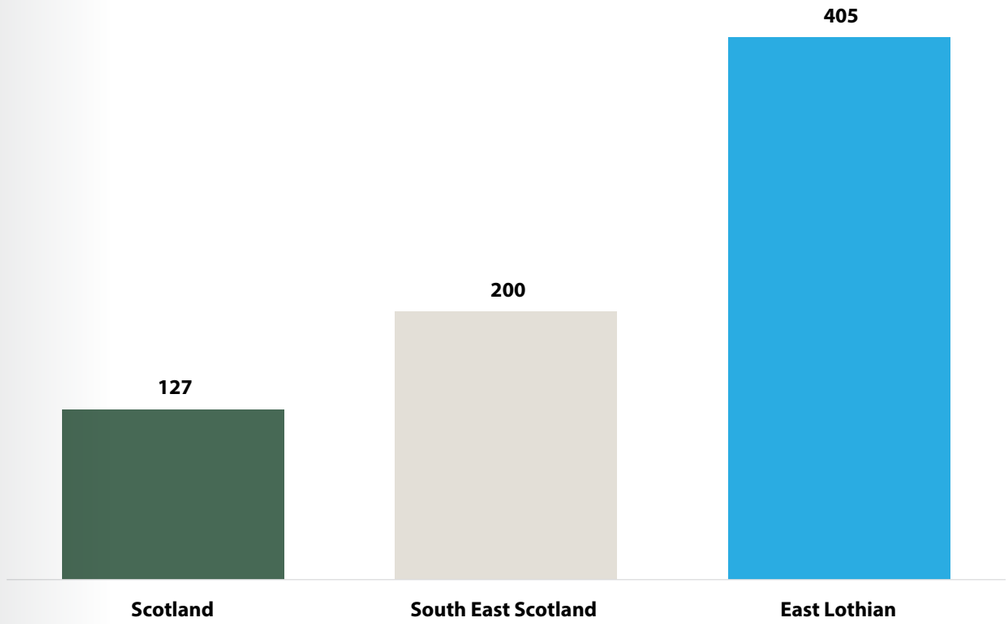
The construction sector in South East Scotland is currently dominated by housebuilding activity and Crystal Rig IV Wind Farm was competing for the material and labour needed for this sector.

South East Scotland, driven by East Lothian in particular, stand out as a relative hotspot of housebuilding. In 2024, there were over 400 homes built for every 1,000 people working in construction in East Lothian, the highest of all local authority areas and more than triple the average across Scotland.

This means that when Crystal Rig 4 started construction, much of the capacity to deliver the project within South East Scotland was already allocated to house building activity. However, the 'Local-First' (see Case Study) approach to procurement that was taken for Crystal Rig IV meant that many of the materials were able to be secured locally, despite competition from the housebuilding sector.

The demand from infrastructure projects like Crystal Rig IV also diversifies the construction sector in South East Scotland and contributes to supply chain resilience.

Houses built per 1,000 construction jobs, 2024



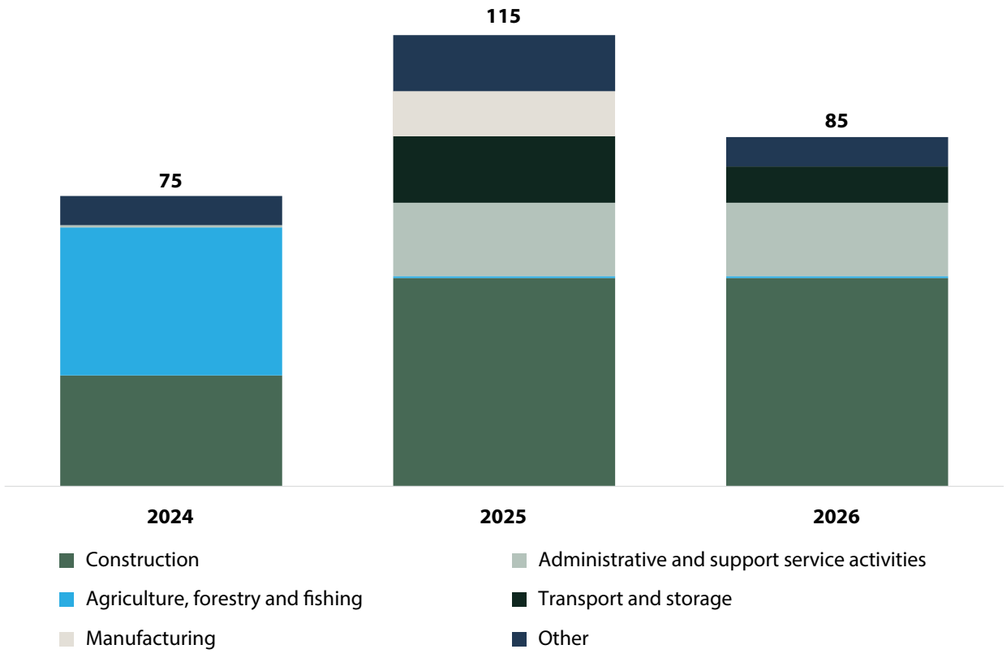
Economic Impact in Scotland

Since 2003, Fred. Olsen Renewables has developed a broad portfolio of renewable energy projects in Scotland.

This continued presence has provided the developer with a strong understanding of the supply chain, allowing it to build on past experience delivering economic benefits nationally.

Through expenditure in Scotland, the construction of Crystal Rig IV generated £19.6 million GVA and 275 years of employment, peaking at 115 jobs in Scotland in 2025.

Crystal Rig IV Scotland Jobs Over Time



Economic Impact in the UK

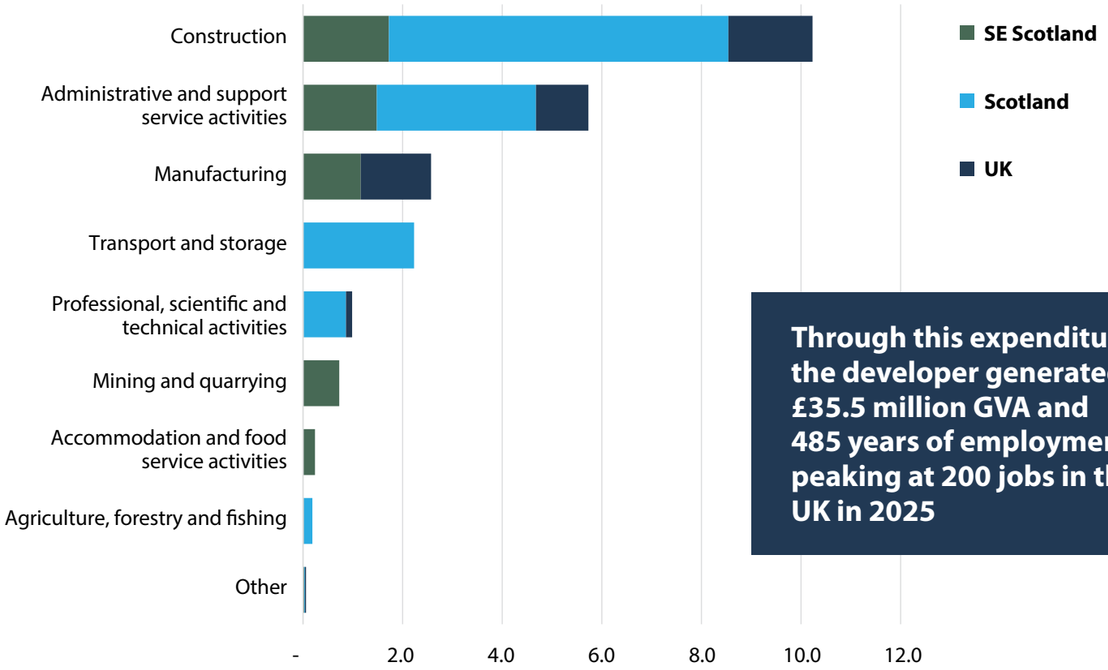
£22.7 million

in expenditure associated with Crystal Rig IV went to businesses and workers within the UK.

This represents almost a third (32%) of total expenditure on the construction phase. This represents a significant share of expenditure, especially considering the share of total expenditure accounted for by turbines, which cannot be manufactured in the UK.

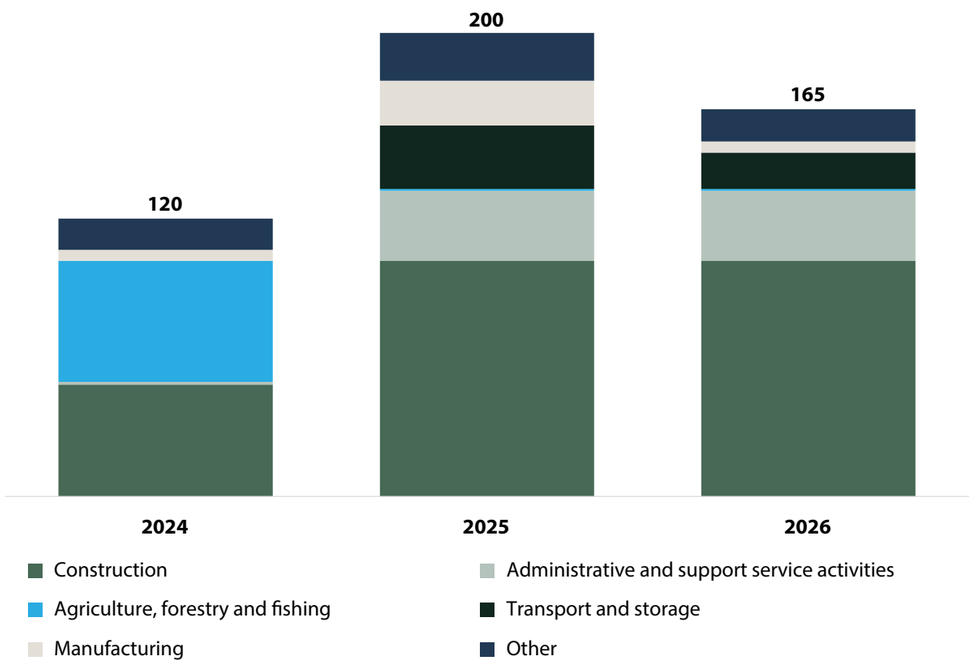
Major sectors which benefitted include construction, administrative and support service activities, and manufacturing.

Expenditure by Area



Through this expenditure, the developer generated £35.5 million GVA and 485 years of employment, peaking at 200 jobs in the UK in 2025

Crystal Rig IV UK Jobs Over Time



Case Study: **RJ McLeod**

RJ McLeod remains the principal civil engineering contractor for Crystal Rig IV, continuing its long-term involvement in the area.

By prioritising a 'local-first' procurement strategy, RJ McLeod has worked to distribute impacts from the Crystal Rig IV Wind Farm into supply chain benefits for the Scottish Borders and East Lothian. RJ McLeod's approach centred on embedding the project within the existing regional industrial fabric.

Additionally, RJ McLeod co-designed the award-winning 'Construction Aware,' a work experience programme for S3 pupils to explore construction roles from inception to completion, working to provide practical insights to young people, helping them to understand the available opportunities, and working to address future demand for skills in the construction and built environment sectors.

Through ongoing outreach and apprenticeship pathways, RJ McLeod continues to showcase careers in civil engineering and renewables. Their long-term involvement at Crystal Rig has built deep community trust and fostered a local supplier cluster that delivers lasting economic and social value across the region.

Case Study: **RJ McLeod**

Rather than bringing in outside resources, RJ McLeod leveraged the expertise of 50 local businesses to provide everything from high-specification concrete to logistical support. The scale of the Crystal Rig IV project acted as a catalyst for investment and growth across several key local partners:

- Tynedale Roadstone: Operating out of local quarries in Cockburnspath, Tynedale provided thousands of tonnes of high-quality aggregates. This demand allowed them to reinforce their position in the renewable market while continuing to invest in their own plant, fleet, and local workforce.
- Geddes Group: The volume of materials required for the site allowed Geddes to accelerate their production schedules. This spike in activity led to the immediate hiring of additional HGV drivers and the engagement of local subcontract hauliers to keep pace with demand.
- Breedon Group: The project sustained a "Triangular Working" model between Dunbar, Blinkbonny, and Temple, ensuring that large-scale concrete pours directly benefited local quarrying and sand-gravel pits.

"The Crystal Rig IV Wind Farm project gave us the confidence and certainty needed to invest in our plant in the South of Scotland. This will enable these quarries to be competitive in the future and support the workforce we have in the area."

Blair Mclennan
Breedon

Case Study: **Scottish Woodlands Ltd.**

Scottish Woodlands are demonstrating how responsible, well-managed forestry can support rural employment opportunities, industry growth and sustainability.

As a leading UK forestry manager, Scottish Woodlands Ltd. is delivering local economic impact at Crystal Rig IV from its involvement in clearing timber to facilitate the site's redevelopment.

Scottish Woodlands has produced upwards of 40,000 tonnes of timber from 99 hectares of land, supporting 20 local jobs within 80 miles of the project.

This local employment approach has ensured the retention of economic benefits from the project in the surrounding communities of the Scottish Borders, working to support rural jobs and strengthen the regional forestry workforce.

Valued at £2.2m, the site's timber supports the UK construction sector and local sawmills across the Borders, Dumfries, and Wooperton strengthening supply chains and regional investment from onshore wind projects.

Case Study: **Vestas**

Vestas is demonstrating local spend through transportation and accommodation spend in the local area.

As the technology partner for Crystal Rig IV, Vestas serves as the Original Equipment Manufacturer (OEM) for project owner Fred. Olsen Renewables. Vestas' role is pivotal to the site's infrastructure, encompassing the supply, mechanical assembly, and electrical commissioning of the turbines for grid connection.

Vestas' commitment to the Scottish supply chain is most clearly evidenced through its logistical strategy. While the turbines themselves are manufactured abroad, the transportation and port fees associated with getting them to Crystal Rig IV represent roughly half of Vestas' total expenditure in Scotland. Intentionally partnering with a Scottish specialist like McFadyens ensures this investment stays within the national economy. This approach ensures that the high-value logistical requirements of the Crystal Rig IV project translate directly into sustained economic activity within the local transport sectors.

Beyond the construction phase, Vestas provides long-term servicing to ensure the development maintains optimal performance and maximum renewable energy output.

Vestas' operations at Crystal Rig IV represent an investment in the Scottish economy, with over £2.7 million spent within Scotland to date.

Vestas also houses staff and specialised subcontractors within the vicinity of the Lammermuir Hills and this ensures that a significant portion of project expenditure flows directly into local hospitality and rental markets. This provides a revenue stream for local businesses throughout the intensive assembly and commissioning phases.

Supply Chain Engagement Summary

A 'Local-First' Approach

By appointing RJ McLeod as the principal civil engineering contractor, Crystal Rig IV was constructed in a way which centred on supporting and developing industrial supply chains in South East Scotland.

Sustaining the Rural Economy

Scottish Woodlands' work clearing the site delivered 20 jobs within 80 miles of the site, directly supporting the rural economy as well as generating wider economic benefits through workers spending their wages locally.

Utilising Local and National Strengths

Vestas ensured significant benefits to Scotland by contracting regional transportation companies. The company also delivered economic impact by utilising accommodation near the site, directly benefitting local businesses.

Supply Chain and Worker Expenditure

As a result of the developer's active work engaging with the supply chain, during the construction of Crystal Rig IV, Fred. Olsen Renewables spent:

£5.3 million in South East Scotland

£18.5 million in Scotland

£22.7 million in the UK

Economic Impact Summary

In South East Scotland

£4.8 million GVA

85 years of employment

40 jobs at peak

In Scotland

£19.6 million GVA

275 years of employment

115 jobs at peak

In the UK

£35.5 million GVA

485 years of employment

200 jobs at peak

Fred. Olsen Renewables

Find out more

The difference we are making on a national and local scale has not been achieved alone. We are connected and engaged in everything we do.

If you wish to contact us to find out more, discuss an opportunity or for any other reason we would love to hear from you.

Contact

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