Scottish Enterprise

Report: Mapping Retrofit and Energy Efficiency Companies in Scotland

November 2025

Contents

Introduction and Project Brief

Background

Built Environment – Smarter Transformation (BE-ST) have been commissioned by Scottish Enterprise (SE) to deliver a research and mapping project to analyse companies working across retrofit and energy efficiency in Scotland.

The project aims to identify gaps and challenges and provide actionable recommendations for strengthening local supply chains. The mapping will focus on three primary categories:

- Professional & Consultancy Services – organisations providing consultancy and project expertise, including architects, building services engineers, energy consultants, project managers, and surveyors.
- Manufacturers & Suppliers – companies producing retrofit and energy efficiency technologies, such as insulation, heat pumps, windows, boilers, and smart energy systems.
- Contractors & Trades– general and specialist construction contractors including retrofit contractors, energy efficiency companies, heat pump installers, energy-efficient window installers, insulation installers.

Project Deliverables

Output 1: Database

An excel spreadsheet has been created using publicly accessible data to allow analysis and evaluation of companies based on:

- Location of head office and associated local authority area
- Company description, contact details and company number
- Category and sub-category of work and specialisations
- Size of company and turnover (when this information is available via Companies House)
- List support organisations related to energy efficiency including education providers and local trade bodies and groups.

Output 2: Develop a Cluster Map for Scotland

A map has been created utilising ArcGIS software to create a visual map highlighting:

- Locations of companies' primary office in Scotland
- Categorisation of energy efficiency companies across the supply chain using the categories:

  - Professional & Consultants
  - Contractors & Trades
  - Manufacturers & Suppliers
- Concentrations of expertise and services to identify gaps utilising visuals from the map

Output 3: Procurement Frameworks

Conduct research, interviews and complete a report to**:**

- Identify and Summarise Scottish Retrofit and Energy Efficiency Frameworks and Capabilities & Investigate Framework Gaps
- Identify existing procurement frameworks related to energy efficiency in Scotland.
- Create a matrix of frameworks and identify gaps in terms of skills, technology, and resources.
- Identify barriers and challenges that prevent companies from participating in these frameworks

Purpose and Intended Use

This report provides an evidence base for Scottish Enterprise to:

- Strengthen support for local supply chains by Scottish Enterprise and other agencies.
- Improve SME engagement with public sector procurement opportunities by mapping the ‘procurement landscape’ and providing recommendations.
- Inform future policy and programme interventions by Scottish Enterprise.

Brief for Database Design

Local authority, public sector, and industry engagement

To develop and finalise the brief for the database and map, initial project activity was focused on industry and stakeholder engagement, including one-to-one meetings with Local Heat & Energy Efficiency Strategy (LHEES) officers, local authorities, academics, delivery agencies, and industry bodies.

This was achieved via delivery of 2 targeted workshops and outreach events, and broader engagement during the industry conference programme:

- 16 LHEES officers participated in a dedicated forum.
- 35 delegates engaged in a focused session at Retrofit Scotland Together Day.
- Open call to 490 attendees at the Glasgow Retrofit Summit during a 3-day event.

This engagement directly informed the data design and categorisation of the database, mapping functionality, and methodology.

Feedback consistently highlighted the fragmented nature of the retrofit and energy efficiency sector, the absence of a centralised dataset and the value of creating a dynamic database able to adapt to a rapidly changing sector.

Methodology & Approach

Rationale for the Methodology

The retrofit and energy efficiency supply chain in Scotland is highly diverse and fragmented, spanning many different company types and roles. Through this project we have not found single dataset that captures this in a comprehensive and consistent way.

Information is dispersed across multiple platforms and data providers – such as Companies House, MCS, TrustMark, the Energy Saving Trust, procurement frameworks, and industry directories (to name a few).

Compounding this, many companies are in transition. For example, a plumbing company may still be listed via public information sources for gas boiler installation (i.e. SIC codes and website comms), although in practice it may already installing heat pumps. This creates challenges in using standard datasets to capture the sector accurately.

Against this backdrop, the project methodology was designed to:

- Consolidate multiple public data sources into one structured dataset.

- Enable future additions through two routes: (i) integration of further datasets (e.g. via establishing data sharing agreements with MCS, TrustMark), and (ii) the potential for manuals updates via SE or companies updating their own details via an online form in future iterations.
- Establish trust by providing a neutral, evidence-based map of the supply chain. Quality assurance of individual companies is outside the project scope. Unlike the Energy Saving Trust's 'Find an Installer' platform that provides ratings for installers, this project does not assess or rate companies but aims to prototype how a single-entry point for Scotland's supply chain could function.
- Ensure dynamism by recommending that the database and map evolve over time. Stakeholders emphasised the importance of keeping the system live and regularly updated; without ongoing maintenance and updates, the data will quickly become outdated.

Approach for Output 1 – Database of Companies

- Data Sources - the database was built from multiple open and trusted datasets (Companies House, FAME, SE Clean Heat Database, Scottish Industry Directories, Energy Saving Trust, public procurement framework listings).
- Data Collection & Processing - automated scripts and 'high-level' web scraping were used to gather, remove duplicates, and standardise company information. This reduced manual checking and improved efficiency given the thousands of companies initially identified.
- Validation & Filtering - criteria were agreed with Scottish Enterprise – including Scottish location, active status, minimum employee count and turnover, and alignment with relevant SIC codes. Manual reviews were carried out where automated processes introduced errors.
- Company Categorisation - using SIC codes, text analysis, and keyword scripts, companies were classified into categories reflecting their role in the supply chain (Professional Services, Manufacturers, Specialist Trades, Contractors/Builders, Support Organisations).
- Limitations - the dataset reflects only publicly available data at a point in time. It does not verify the quality of services offered or geographic service coverage. Due to the limitations of scope and data availability, there are many companies that work within retrofit and energy efficiency that will not be included if they do not already feature on the existing data sources; as noted above, the intention in this phase is to provide a starting point and roadmap, not a finished product.

Approach for Output 2 – Cluster Map (ArcGIS Visualisation)

Link to ArcGIS Map

- Purpose - the map was developed by SE to provide a visual, user-friendly way to explore the supply chain. Local authorities and industry stakeholders asked for a tool that could be searched by location and company category.
- Design - ArcGIS was chosen as SE already holds a license and in-house expertise. The database was geocoded using Scottish postcode data and uploaded into ArcGIS.
- Functionality - users can filter by local authority, company category, and sub-category, then view results by geographic concentration.
- Limitations - the map only shows company headquarters, not service coverage. For example, a firm based in Glasgow but serving the Central Belt will only appear in Glasgow on the map. Direct engagement with companies would be needed in future to improve accuracy. Additionally, ArcGIS uses postcode location – in certain rural areas a postcode can cover a large area.

Process and Methodology for building the database:

Stage	Title	Key Activities
1	Database Design & Specification	Confirmed criteria for database search – Scottish location, constituted SME company, 10+ employee count, £500K + turnover, active trading status, and SIC filters.
2	Data Logic for Acquisition	Established logic for consistent acquisition from open/public datasets. Prioritised open-source, publicly available datasets – Companies House, Scottish Industries Directories, Energy Savings Trust, MCS, TrustMark, Procurement Framework companies. FAME Database and a Clean Heat database was also provided by SE.
3	Initial Collection (FAME)	Queried FAME using criteria outlined in Stage 1 above; 3,500+ companies identified. Challenge was highlighted to assess and refine this dataset on a manual basis – automation tools were developed to assist with reviewing this data.
4	Validation, Enrichment, Web-Scraping	FAME database enriched via APIs, directories, and web scraping; deduplicated and standardised. Filled gaps in database via automated scraping.
5	Integration with additional datasets	Sourcing of additional datasets – Procurement Framework Analysis, SE Clean Heat Database, Scottish Industries Directory, Energy Savings Trust, Scottish Postcode Directory 2025. MCS and TrustMark were engaged to establish data sharing agreements (details later in report).
6	Role Matching & Classification	Categorised by SIC code and text analysis into industry roles using script to highlight keywords and auto populate into pre-defined categories: Professional services, Equipment manufacturers, Suppliers, SME contractors.
7	Completeness and Data Quality Checks	Automated field completion checks for data fields. Manual review of long-list of 3K+ companies highlighted considerable number of companies that were out of scope for this research – highlighting the challenge of using SIC codes in such a diverse sector.
8	Database build from trusted sources	The final database was built using trusted data sources via Procurement Framework Analysis, SE Clean Heat Database, Scottish Industries Directory, Energy Savings Trust. Only company names were utilised and then cross-referenced with FAME and Companies House data to complete the data fields.
9	Manual check and alignment with ArcGIS	This data set was uploaded onto ArcGIS software to check functionality and assessment made to complete final changes to data fields.
10	Data analysis & reporting	Final dataset uploaded to Monday.com to run data through a series of visualisations to cross-reference data quality, highlight gaps and create analysis and visualisations for this report.

Utilisation of Database

Database Overview & Delivery

The database has been produced as an Excel spreadsheet with structured, filterable fields, and is uploaded to the ArcGIS platform for visualisation. Together, the database and the cluster map provide a starting point for mapping Scotland's retrofit and energy efficiency supply chain.

The master database will be held and managed by SE. ArcGIS will be the software that allows members of the public to visualise the data and interact with it. It is not proposed that the master database is made public.

When reviewing the data for analysis, SE will be able to apply filters to tailor queries by:

- Company name
- Geographic location (postcode or local authority)
- Size (employee count, turnover)
- Category (e.g. manufacturer, contractor, specialist trade, professional service, support organisation)
- Data source

This enables SE to identify regional concentrations, sector-specific capabilities, and potential supply chain gaps across Scotland.

Methodology for Future Development

The database has been designed to evolve over time in response to changes within the sector. Future development can occur through three complementary routes:

1. Integration of Additional Datasets

- New datasets received in Excel/CSV format can be merged into the existing master file using Company Registration Numbers as the unique identifier.
- Data validation processes (e.g. deduplication, address standardisation, SIC alignment) should be applied before integration.
- Company data can be sourced via Companies House as a trusted source that companies are mandated to update annually.

2. Manual Entry and Moderation

- SE can add companies directly into the dataset by following the defined template and categories.

- To ensure consistency, dropdown menus and data validation tools have been built into the workbook.
- Each new entry should be reviewed against Companies House to confirm active status and eligibility.

Future Development and Sector Engagement

To maintain relevance and impact, the database must be supported by a sustained programme of engagement with the sector. This should include:

- Company removals and status changes - at present, there is no automated process for removing companies that become inactive. A future phase could include automated checks with Companies House APIs to track dissolved or inactive companies.
- Regular outreach projects and awareness campaigns – contacting companies to confirm information, update records, and capture service coverage. Awareness campaigns could include an annual report produced to give a 'sector snapshot' – showing how the sector is evolving in Scotland, while also raising awareness of the database and encouraging companies to submit updated information.
- Automated data pipelines – establishing API or data-sharing agreements with accreditation bodies and industry directories to ensure annual checks and validation.
- Dynamic platform development – ensuring direct links between data submission, database, map – currently this relies on manual process and automation could be explored to reduce time lag, resourcing limitations, and manual data entry mistakes.

Utilisation of ArcGIS Map

Purpose and Function

ArcGIS has been selected as the platform to present Scotland's retrofit and energy efficiency supply chain in a clear and interactive way. While the underlying database is managed by Scottish Enterprise, the ArcGIS map provides the public-facing interface, allowing users to explore the data visually and filter results by geography, company type, and sector role.

User Experience

The map has been structured to support a simple and intuitive search process. Users will be able to:

1. Select Local Authority area(s) – for example, Glasgow, East Ayrshire, East Dunbartonshire, and East Renfrewshire.

2. Choose a Category – four main categories are available (each colour coded):

- Professional Services
- Equipment Manufacturers
- Specialist Trades
- Contractors and Builders

3. Filter by Sub-Category – each category includes more specific roles or technologies, such as *Heat Pump Installers*, *Insulation Installer*, or *Window & Door Manufacturers*.

For example, a user could filter by "Glasgow City Region" / "Contractors & Trades" / "Heat Pump Installers," and view only those companies that meet the selected criteria.

Design Considerations

- Categories and sub-categories have been selected to provide clarity for public users. While the current sub-category list is extensive, it will be reviewed and refined to streamline the user experience.
- Colour-coding will distinguish the five main categories, making the map easier to navigate.
- Scalability has been built into the design, enabling further datasets or new categories to be added without redesigning the platform.

Limitations and Disclaimer

A disclaimer has been agreed upon with Scottish Enterprise that should feature on the map website page:

The map reflects registered company headquarters (per Companies House) only and does not therefore show the entirety of their service areas. For example, a company headquartered in Glasgow may also deliver services in the Highlands but will only appear on this map in Glasgow.

Although endeavours have been made to ensure the map is reliable - companies shown on the map have been identified through public datasets and Scottish Enterprise has not independently verified the accuracy or completeness of the information.

For the purposes of this map, Scottish Enterprise has not vetted, assessed and is not endorsing any individual company. Inclusion should not be interpreted as endorsement or recommendation.

The map and associated information are provided for general informational purposes only. Users remain responsible for undertaking their own assessments and due diligence before engaging with companies shown.

A downloadable version of this report is available on the Insights section of the Scottish Enterprise website which explains the data sources used, the methodology applied, and how the database and map may be updated over time.

Should you require additional information or have any queries about how this map was created, please contact Catriona.mactaggart@scotent.co.uk

Learning: Database & Map

Scope and limitations

The retrofit and energy efficiency supply chain is highly diverse and spans a wide range of sectors and business types. This is reflected in the three main categories used in the project scope: Professional / Consultant Roles, Builders / SME Contractors, Manufacturers / Suppliers.

The sector is also evolving rapidly in response to modern technologies, policy changes, funding streams, and market opportunities. This pace of change makes it difficult to accurately map the supply chain using only publicly available data.

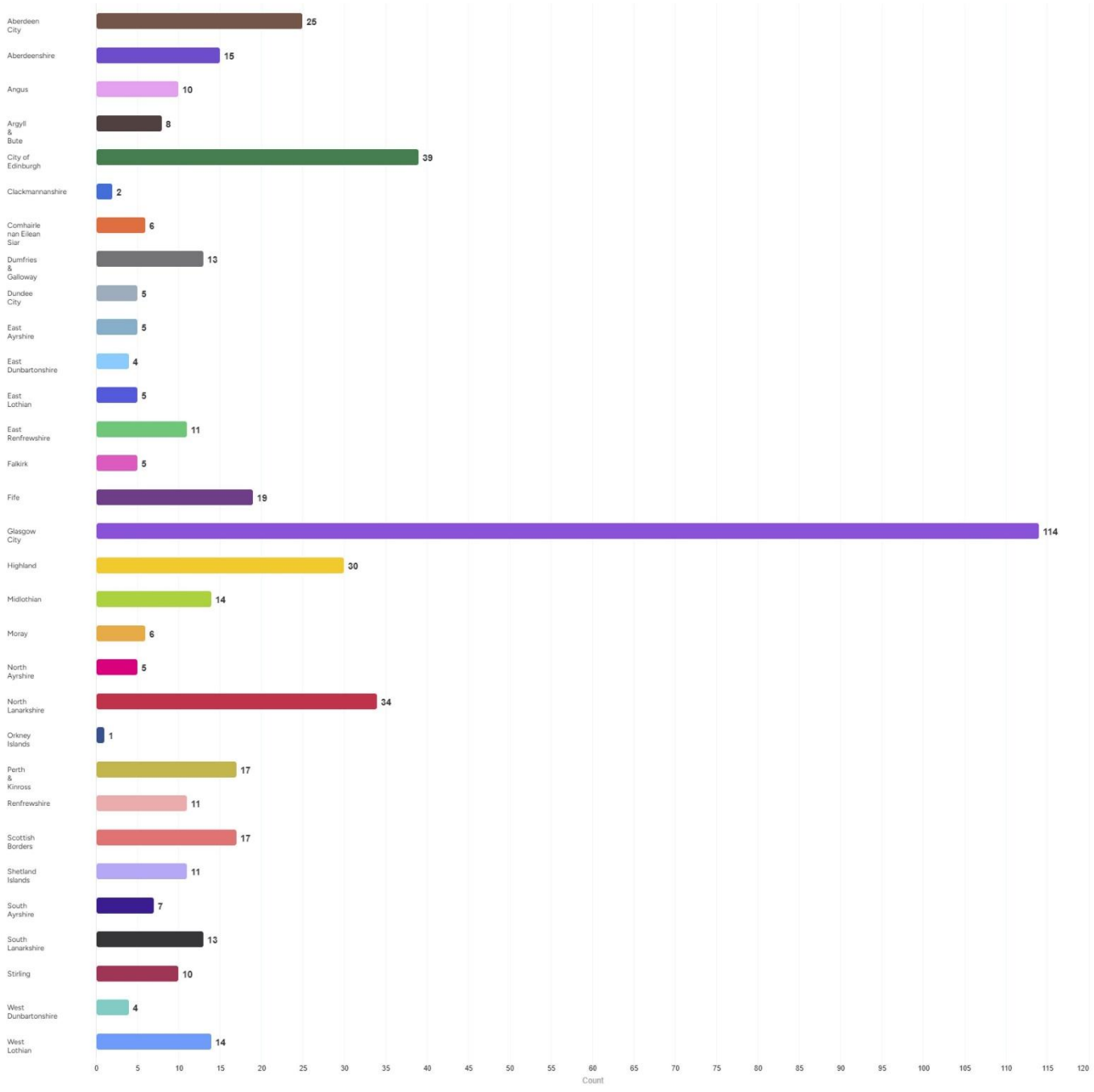
This report is based solely on the dataset developed during this project, which reflects only what is publicly available at the time of analysis.

- We have provided analysis and recommendations based on quantitative insights from the final dataset.
- The dataset was compiled primarily from open data sources - Companies House, Procurement Framework data, SE Clean Heat Database, Scottish Industries Database, Energy Saving Trust, FAME Database, TrustMark website, web listings.
- No interviews, surveys, or direct outreach was conducted. This limits the ability to fully verify or contextualise the data.
- Without engaging companies directly, we cannot confirm their full range of services, delivery capacity, or actual geographic coverage - only what is indicated in public records or digital channels.
- The absence of qualitative input (which falls outside the scope of this phase) means the report cannot assess company perspectives on challenges, barriers, skills gaps, or pipeline opportunities.
- Interviews and surveys were conducted as part of the separate procurement report – which provided the context and analysis for the procurement frameworks.
- Any inaccuracies or outdated information from source platforms are inherited in the analysis. The lack of a single, verified industry dataset further constrains confidence in overall completeness.

Analysis of companies on dataset

The total number of companies in the dataset is 480.

Companies with offices or premises in Scotland, segmented by local authority area:

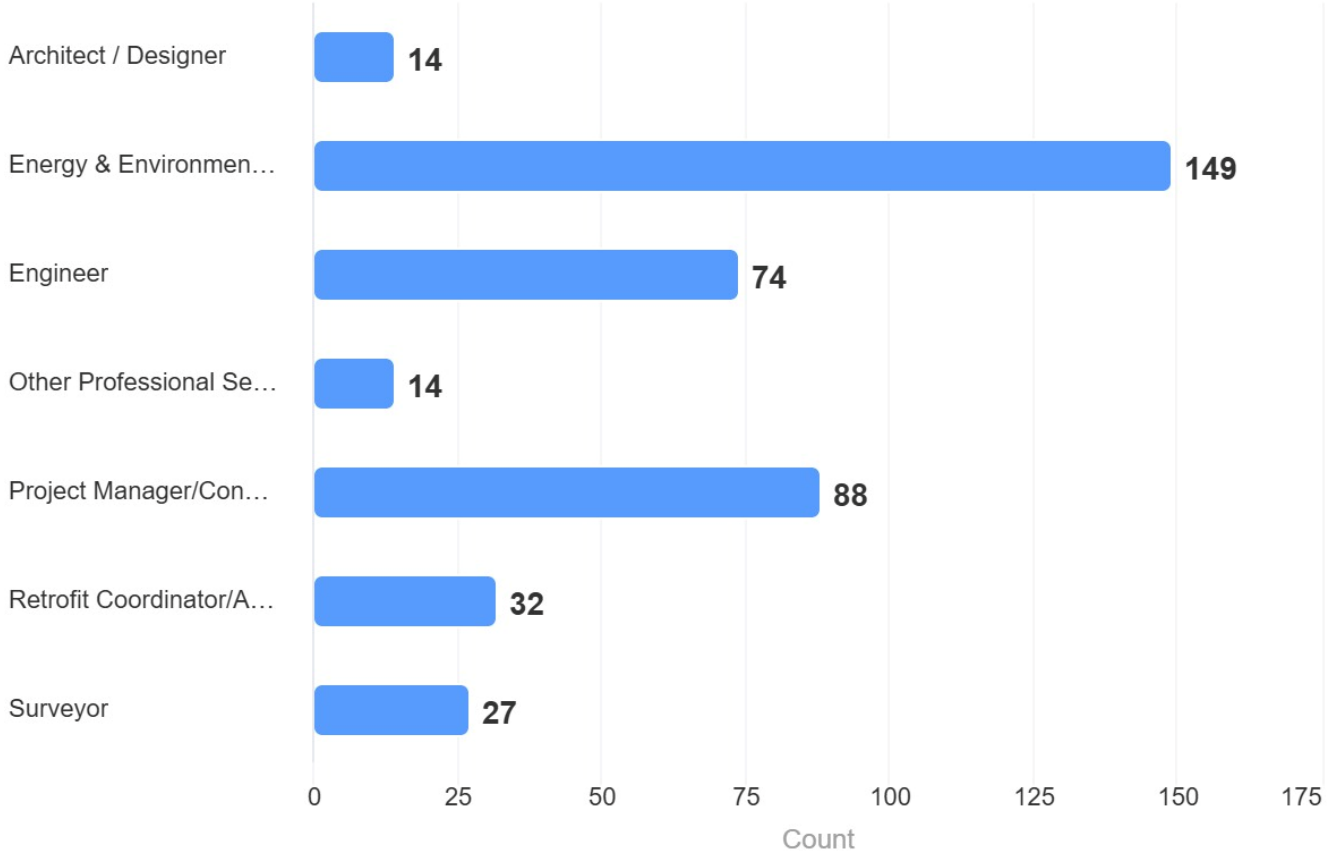


Notes

- Each company is represented by a single address, prioritised by the registered office address listed in Companies House. Where a company is headquartered outside Scotland but has a confirmed Scottish office, that Scottish location has been used.
- The dataset does not capture the full geographic service area of each company. Many organisations deliver services across multiple regions; this level of detail would require further engagement and questionnaire-based data collection.

- Some companies that operate within Scotland but do not maintain a registered office or premises in the country have been excluded. This aligns with the defined scope of this research, which focuses on companies with a verifiable physical presence in Scotland.

Professional & Consultancy Roles



Analysis

Many firms within the database provide a range of professional and consultancy services, rather than specialising in a single discipline. The ArcGIS map can be used to explore both the diversity of these services and their geographic distribution across Scotland.

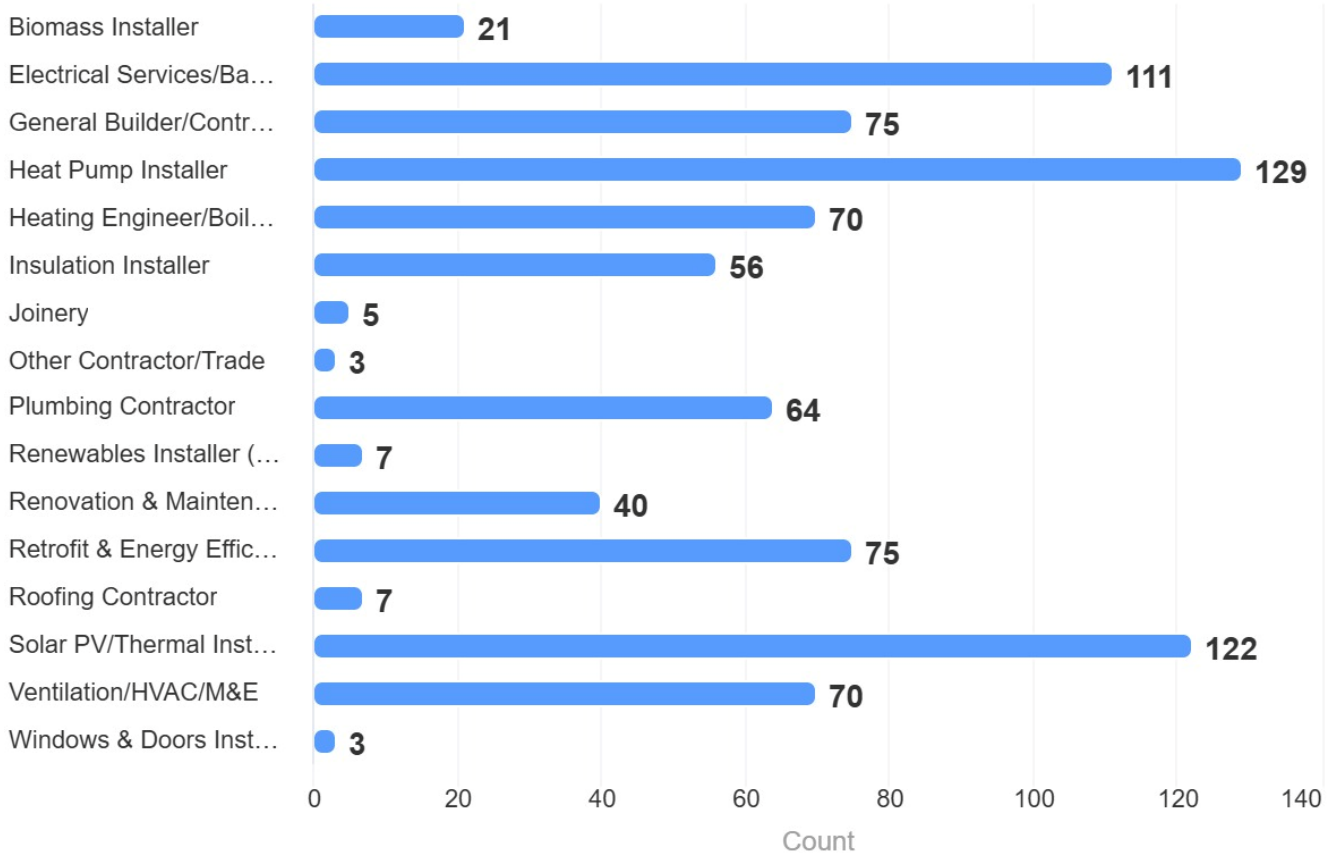
Architecture and design services play a key role in developing and delivering retrofit projects. These roles are location and context specific, as they often require site visits, building assessments, and close collaboration with contractors and clients. Within the current dataset, 14 firms have been tagged as providing architectural and design services related to retrofit and energy efficiency. This represents only a small sample of the broader design community involved in this sector. A targeted engagement exercise would help to expand and verify this list, potentially in partnership with the Royal Incorporation of Architects in Scotland (RIAS) ensuring a more comprehensive view of Scotland's retrofit design capability.

The database also highlights several SME companies that deliver Retrofit Coordination and Assessment services. However, it is important to note that accreditation for a Retrofit Coordinator is held by individuals, not companies. As the scope of this project focused on

incorporated businesses, many accredited individuals operating independently are not captured in this dataset. Further analysis and engagement with accreditation schemes (e.g. TrustMark and Elmhurst) would be required to include these roles in greater detail in future updates.

Contractors & Trades

There is a strong mix of contractors and trades.



Analysis

Scotland's retrofit demand is estimated at around 2.6 million homes, requiring upgrades to approximately 113,000 properties per year to meet government targets under the Heat in Buildings Strategy. Considering the scale of this challenge, there is a clear need for a deeper understanding of the contractor and trades supply chain. This report and dataset are a snapshot of this supply chain.

Many companies in the database deliver a mix of services across multiple trades, including electrical installations, solar PV and thermal systems, and battery storage. This reflects the increasingly integrated nature of retrofit delivery, where companies combine traditional construction skills with emerging low-carbon technologies.

A considerable proportion of these firms are in transition - for example, gas boiler engineers diversifying into heat pump installation and renewable heating systems. Future

supply chain mapping should aim to capture the pace of this transition and identify how companies can be effectively supported through training and skills development. This will be key to ensuring local businesses can take advantage of emerging retrofit opportunities and fill geographic coverage gaps across Scotland.

The companies represented in this dataset form only a small proportion of the wider construction industry. Many businesses active in general construction do not currently self identify as part of the retrofit and energy efficiency sector. This presents both a challenge (in accurately mapping the sector) and an opportunity - to raise awareness of the economic potential of retrofit and to deliver targeted support for skills, innovation, and business growth.

This report includes a series of recommendations to establish a dynamic, evolving database capable of tracking the growth and transformation of Scotland's retrofit supply chain.

While the database provides a strong baseline of identified specialist contractors, there remains a gap in understanding the true geographic reach of these companies. At present, the dataset is based on company headquarters rather than service areas. Many contractors operate well beyond their registered office location, particularly in trades where coverage is scarce (e.g. heat pump installers in rural and island areas).

Methodology for Improved Coverage

To build a clearer picture of service provision across Scotland, the following approach is recommended:

- Design and deliver a direct engagement project with contractors. This could include reaching out to companies listed in the Master Dataset and those identified through sources such as the FAME database – this totalled over 3,500 companies.
- Use a dedicated questionnaire or online form to collect data on geographic service areas.
- The form could include a checkbox list of all Scottish local authority areas, allowing contractors to self-report where they deliver services.

Analysis of Service Provision

- Aggregate responses to map "hot spots" (areas with multiple providers) and "cold spots" (areas with few or no providers).
- Cross-reference these gaps with policy priorities, for example the Scottish Government's targets for rural heat pump adoption under the forthcoming Heat in Buildings Bill.
- Use the cluster map and existing role classifications in the database to highlight concentrations of specific trades (e.g. insulation installers, renewable heating specialists).

Overlay with External Datasets

To strengthen analysis, service provision data could be compared with:

- EPC data (to highlight regions with poor building efficiency)
- Outputs from research projects such as the Existing Buildings Database (Robert Gordon University), which provide insight into Scotland's building stock and retrofit needs.

This would allow supply capacity to be directly compared with demand, creating a more robust evidence base for investment and policy support.

Observations and Recommendations

- Regional imbalances – the database demonstrates a concentration of specialist contractors around the Central Belt, with rural and island regions under-served. This has significant implications for meeting national targets where rural adoption of low-carbon technologies, such as heat pumps, is a priority.
- Service area mapping via direct supply chain engagement is critical - it is not possible to determine where gaps truly exist.
- Policy alignment – a future output could link contractor coverage with EPC data and LHEES priorities, this would provide Scottish Enterprise with insight in how to target support and investment where the evidence shows supply-demand mismatches emerging.
- Retrofit Funding Programme Engagement – Meetings with the Energy Saving Trust and Local Energy Scotland highlighted the absence of a central database to track supply chain capacity against targets set by national programmes such as Home Energy Scotland and CARES. Strengthening engagement with these service providers would provide greater clarity on how supply chain gaps are affecting the delivery of projects and the allocation of funding. Access to data on the companies that have delivered work through these schemes would represent a valuable resource for identifying gaps and validating supply chain readiness.

Manufacturing Analysis

Overview

Manufacturing is an important component of Scotland's retrofit and energy efficiency supply chain. The ability to produce key technologies and materials domestically reduces reliance on imports, supports local job creation, skills development, inward investment, and helps lower carbon emissions from transportation.

For this analysis, manufacturing companies are defined as organisations that design, fabricate, or assemble physical products, components, or materials used in retrofit and energy efficiency measures. The database only includes on manufacturers with a headquarters or operational facility in Scotland, while recognising that many products are currently imported or produced elsewhere in the UK or internationally.

The findings presented here are drawn from the project database, which consolidates companies already listed on trusted sources accessible during this project. It is acknowledged that this does not represent the full scope of every manufacturer in Scotland. The sector is diverse, spanning many categories and sub-categories. For example, window manufacturing alone covers timber frame units, traditional 'sash and case' windows, uPVC products, roof lights, and glazed façade systems. Within this, multiple layers of production exist – frame fabrication, glazing units, coatings and finishes, and installation. Not all these companies would self-identify as part of the retrofit and energy efficiency sector, even though their products are relevant. A comprehensive evaluation of all such manufacturers is beyond the scope of this database and report.

On this basis, inclusion in the database has been defined as companies that are actively engaged with recognised procurement frameworks, industry databases, or accreditation bodies linked to energy efficiency, clean heat, or renewables.

As noted elsewhere in the report, this database and map should be regarded as a starting position for building a more detailed view of the supply chain. Two future routes to strengthen and expand the dataset have been identified:

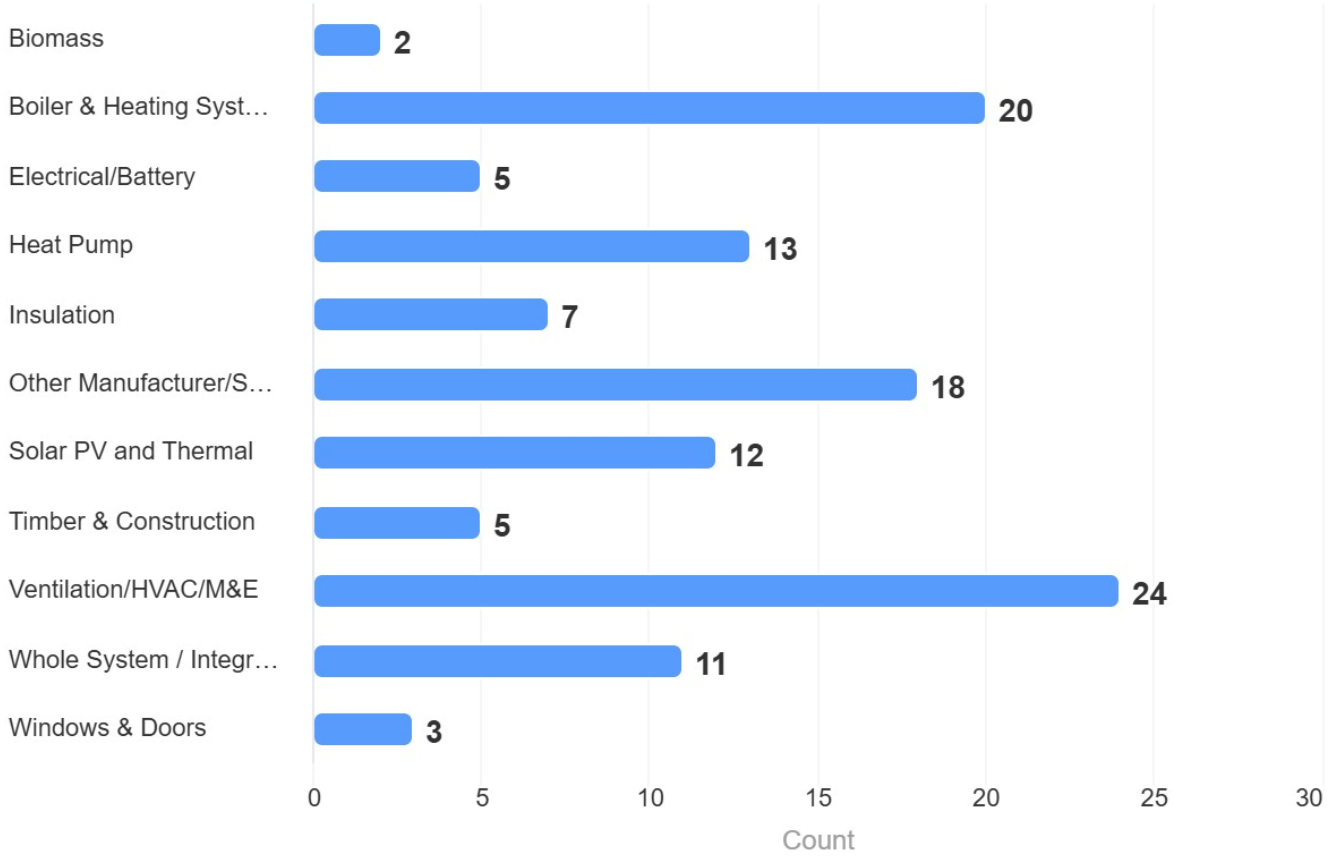
- Aggregation and partnership with additional data sources. It was not possible to establish a data sharing agreement with MCS or TrustMark in the scope and timeline of this project – however this is a key recommendation for next stages.
- Self-identification by companies through an online form or engagement process.

Together, these approaches provide Scottish Enterprise with the best platform to target investment and support, while encouraging wider industry participation over time. □

Manufacturers & Suppliers in the database

The database includes 74 companies tagged as manufactures and/or suppliers.

These manufacturers are active across a range of product categories, including:



Review of the data

The database demonstrates a strong weighting towards **mechanical and electrical (M&E)** provision, including companies involved in **heating systems, solar/PV, ventilation etc**. This reflects the growth of the clean heat technology sector, which is central to decarbonising heat and meeting Scotland's national Net Zero and Heat in Buildings targets.

Further analysis and direct engagement with these companies is required to clarify the distinction between those that manufacture products within Scotland and those that primarily supply or distribute products manufactured elsewhere. This engagement would also provide valuable insight into the opportunities and barriers to expanding production capacity in Scotland, including infrastructure, skills, and investment needs.

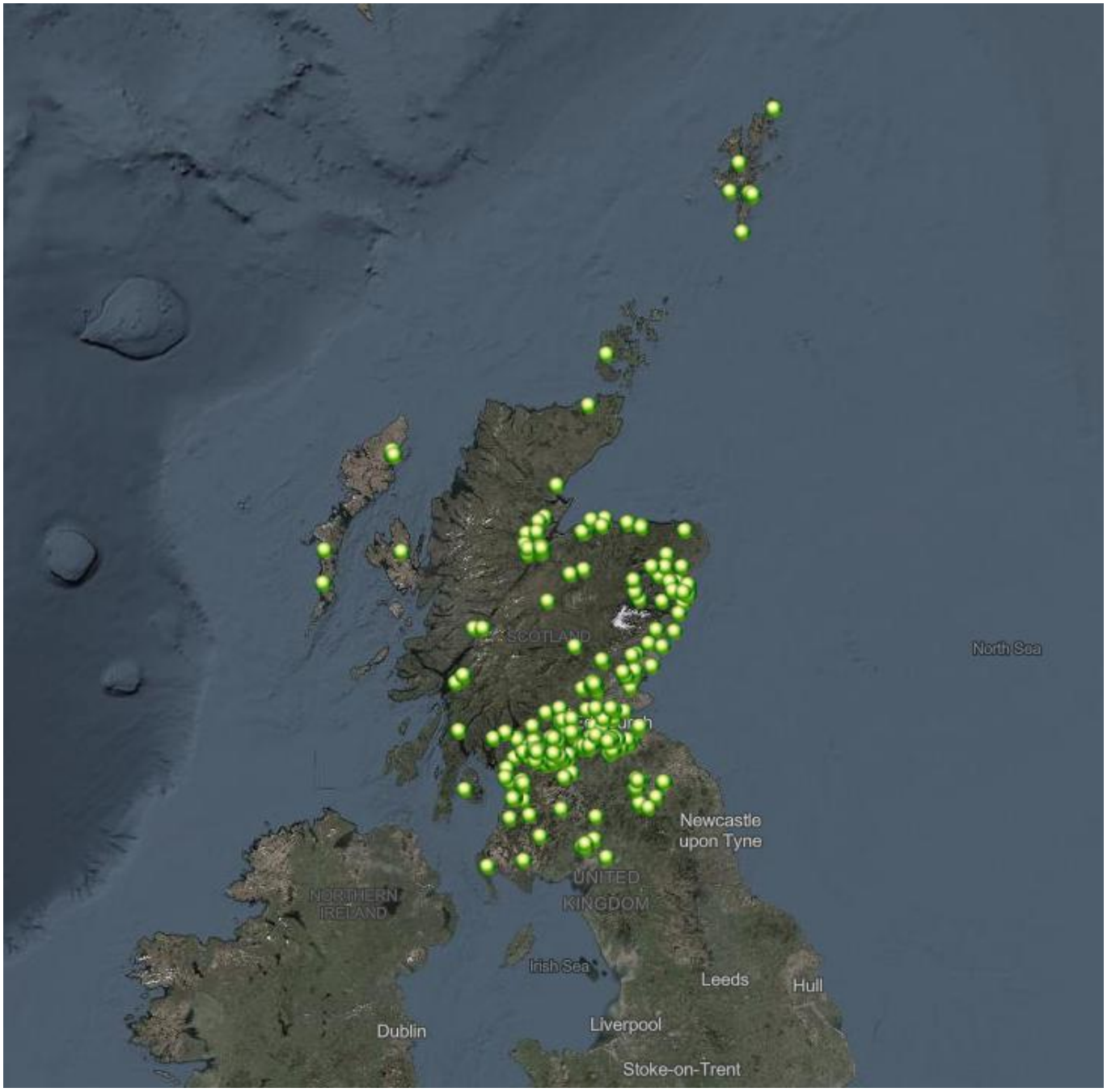
While the database shows a concentration of M&E and clean-tech manufacturers, there is also scope to examine building fabric measures in greater detail. Sectors such as home-grown natural insulation (for example, hemp, wood fibre, or timber-based systems) present significant opportunities to leverage Scotland's natural resources. These products not only enhance the energy efficiency and comfort of buildings but also contribute to carbon sequestration and healthier indoor environments.

Recommendations

This analysis provides a valuable starting point but should be viewed as an initial baseline rather than a comprehensive assessment of Scotland's retrofit manufacturing capacity. To build on this work, the following actions are recommended:

- Targeted Outreach and Survey - undertake engagement with the identified Scottish manufacturers to validate production capabilities, understand growth constraints, and document the specific activities delivered at each site or facility.
- Integration with SE Programmes - link future activity with Scottish Enterprise's manufacturing, inward investment, and clean heat teams to ensure alignment with wider industrial and economic strategies.
- Assessment of Production Capacity - future phases should seek to capture production volumes and scalability, as current data does not provide insight into the extent to which Scottish manufacturing can meet rising market demand.

ArcGIS Map



The ArcGIS Map is linked here

At the time of this report being published the map was still in 'development and testing' mode, prior to being published on the SE website. Once the map is live our recommendation is to position it as a 'Beta / testing phase' - this will allow the map to be issued to key user groups, a link to a feedback form for the map can be included – this would be a useful tool to gather feedback on how the map can be improved to suit the needs of the range of users who interact with the tool. This feedback should be collated into a next stage development plan / brief to be reviewed in conjunction with the recommendations of this report.

Support Organisations

Support organisations play a valuable role in strengthening Scotland's retrofit and energy efficiency supply chain. They provide industry coordination, skills development, innovation, advocacy, and funding-creating the enabling environment that allows suppliers, installers, and manufacturers to deliver at scale. Mapping these organisations alongside commercial actors gives a more complete picture of the sector's infrastructure.

Definition

For this project, "support organisations" are defined as non-commercial entities whose primary function is to enable, facilitate, or enhance the delivery of retrofit, energy efficiency, or low-carbon heating projects in Scotland. Their activities may include training, research, advocacy, policy guidance, funding, and innovation support.

Sub-Categories

- Trade Body – Membership-based industry associations that represent sector interests, set standards, and provide networking (e.g. SELECT, SNIPEF).
- Professional – Regulatory or accreditation bodies governing professional practice (e.g. RICS, professional engineering institutions).
- Public Body – National or local government agencies and arms-length bodies (e.g. Scottish Enterprise, local authority energy teams).
- Training Provider – Vocational or academic organisations offering skills development and certification.
- Innovation Centre – Facilities and networks supporting R&D, technology testing, and sector innovation
- Dedicated Research Centres – Academic or independent institutes producing evidence, analysis, and sector insight

Overview of support organisations operating in Scotland

Name	Type	Description	Location Served
SELECT	Trade Body	Electrical contractors trade association	Scotland
SNIPEF	Trade Body	Represents plumbing and heating firms	Scotland & NI
Federation of Master Builders (FMB)	Trade Body	Supports small and medium builders	UK-wide (Scotland office)
BESA	Trade Body	Mechanical and HVAC trade body	UK-wide (Scotland group)
RIAS	Trade Body	Architects professional body	Scotland
CIBSE	Trade Body	Building services engineers institution	UK-wide
CITB	Professional / Accreditation	Construction training and funding body	UK-wide (Scotland)
The Retrofit Academy CIC	Professional / Accreditation	Retrofit coordinator training provider	UK-wide (includes Scotland)

TrustMark	Professional / Accreditation	Government-endorsed quality scheme	UK-wide
MCS	Professional / Accreditation	Certified renewables installer scheme	UK-wide
RICS	Professional / Accreditation	Chartered surveying professional body	UK-wide
Scottish Enterprise	Public Body	Economic development agency	Scotland (Lowlands)
Highlands and Islands Enterprise	Public Body	Supports regional economic growth	Scottish Highlands & Islands
South of Scotland Enterprise	Public Body	Regional enterprise agency	Scottish Borders & Dumfries and Galloway
Skills Development Scotland	Public Body	Scotland's national skills agency	Scotland
Scottish Funding Council	Public Body	Funds colleges and universities	Scotland
Warmworks Scotland	Public Body	Delivers Warmer Homes Scotland	Scotland-wide
Home Energy Scotland	Public Body	Free energy advice service	Scotland-wide
Public Contracts Scotland (PCS)	Public Body	Advertises public procurement	Scotland-wide
Scottish Futures Trust (SFT)	Public Body	Net zero public buildings strategy	Scotland
Historic Environment Scotland	Public Body	Supports retrofit of historic buildings	Scotland
Energy Skills Partnership (ESP)	Training Provider	Coordinates net zero skills in colleges	Scotland-wide
Dumfries & Galloway College	Training Provider	Net zero skills training hub	South Scotland
West College Scotland	Training Provider	Retrofit in practice course provider	West Scotland
The Retrofit Academy	Training Provider	Retrofit coordinator qualifications	UK-wide
BE-ST	Innovation Centre	Construction innovation and training hub	Scotland-wide
Retrofit Scotland	Innovation Centre	Knowledge and skills platform hosted by BE-ST	Scotland-wide
Offsite Solutions Scotland	Innovation Centre	Modern methods of construction	Scotland
Centre for Net Zero High Density Buildings	Research Centre	Retrofit innovation in urban buildings	Scotland (based in Edinburgh)
Centre of Excellence in Sustainable Building Design	Research Centre	Sustainable building research	Scotland (Heriot-Watt University)
Edinburgh Retrofit Collective	Research Centre	Retrofit action-research group	Edinburgh
University of Strathclyde	Research Centre	Energy retrofit research	Scotland
Energy Systems Catapult	Research Centre	Energy innovation and systems advice	UK-wide
Energy Saving Trust	Non-Profit	Delivers energy advice and grants	Scotland and UK
Changeworks	Non-Profit	Low carbon living and retrofit charity	Central and North Scotland
Zero Waste Scotland	Non-Profit	Circular economy and carbon savings	Scotland
Energy Action Scotland	Non-Profit	Campaigns to end fuel poverty	Scotland
Scarf	Non-Profit	Regional energy advice and retrofit	Northeast Scotland
The Wise Group	Non-Profit	Employability and energy advice	Central belt
The Energy Agency	Non-Profit	Home energy efficiency and advice	South West Scotland
Local Energy Scotland	Non-Profit	Manages CARES funding scheme	Scotland-wide
Existing Homes Alliance Scotland	Non-Profit	Retrofit and policy advocacy	Scotland
Scottish Communities Climate Action Network	Non-Profit	Community-led climate action	Scotland
Scotland Excel	Framework Provider	Local authority energy efficiency framework	Scotland-wide
Scottish Procurement Alliance (SPA)	Framework Provider	Public retrofit framework provider	Scotland-wide
Procurement for Housing (PfH)	Framework Provider	Housing-led decarbonisation frameworks	UK-wide (Scotland lots)

Learning: Procurement Framework Analysis

Context

This section provides headline information of a supplementary report produced to review and analyse the procurement frameworks for retrofit and energy efficiency works and services. The section below provides a summary of the findings, and relevance to the retrofit and energy efficiency mapping project.

Overview of the Procurement Analysis Report

- The report aimed to assess how current frameworks support or limit Scottish supplier participation.
- Focused on SME involvement, market access, and alignment with Net Zero and Local Heat and Energy Efficiency Strategies (LHEES).
- Combined desk research with interviews and survey feedback from suppliers, buyers, and framework managers.
- For this summary we have pulled out the main headings from the report with key takeaways. For the full analysis please review the full report “Retrofit & Energy Efficiency Framework Analysis and Recommendations”.

Framework Overview

- Frameworks provide legally compliant, fast routes to procurement for public sector bodies.
- Allow direct awards or mini-competitions from pre-approved suppliers.
- Primary frameworks analysed:
  - Scotland Excel – Local authority focused
  - Scottish Procurement Alliance – Regional public sector support
  - Procurement for Housing – Housing-specific procurement
- All frameworks selected align with Net Zero and LHEES delivery.
- Public Contracts Scotland remains the primary route for framework advertising.

Market Participation & Supplier Profile

- 80 suppliers are active across 269 framework spaces (lots and workstreams).
- Participation is highly concentrated - top 10 suppliers occupy 25% of all spaces.
- Only one in eight suppliers has fewer than 10 employees, despite micro-firms being 81% of Scotland’s construction sector.
- Defined as SME-friendly, but practical barriers persist for micro and rural firms.
- Barriers include high bid costs, complex documentation, and minimum turnover/insurance thresholds.

Framework Gaps and Challenges

- Framework visibility is limited - no central listing or consistent promotion of opportunities.
- Rural and island regions are underrepresented among framework suppliers.
- Key roles like PAS 2035 Coordinators and specialist services are missing in some regions.
- Many retrofit projects fall outside frameworks due to value (<£500k) or client type.
- Over-reliance on tier-one contractors limits direct SME growth and innovation.

Feedback from Suppliers and Stakeholders

- SMEs report costs of £5k–£10k and 4–6 weeks of effort per submission to frameworks.
- Framework documents can include generic or misaligned quality questions.
- Local authority officers report confusion around lot structure and usage.
- Suppliers call for better pre-tender visibility and simpler compliance processes.
- Direct award routes seen as effective and efficient by both suppliers and buyers.

Strategic Opportunities for Improvement

- Develop micro-lots under £250k to support local firms and rural areas.
- Pilot graduated turnover thresholds to ease entry for smaller businesses.
- Introduce bid-writing support and downloadable compliance templates.
- Refresh framework supplier lists on a rolling basis rather than fixed 4-year terms.
- Strengthen regional engagement through supplier days, especially in Highlands and Islands.

Summary and Recommendations

- Frameworks are essential but not sufficient to meet the scale of retrofit demand.
- Focus must shift to enabling micro-enterprise access and regional supply chain development.
- Improve communication of framework opportunities and procurement timelines.
- Introduce flexibility and inclusivity into framework design and management.
- Align procurement reform with Scottish Government's Net Zero, LHEES, and inclusive growth goals.

Further Recommendations: Database & Map

Engagement with LHEES Officers & the Public Sector

- Over 550 stakeholders engaged, including 31 one-to-one meetings, 16 LHEES officers, and 490+ delegates at public events. Engagement included local authorities, academics, training providers, and industry leaders.
- Feedback consistently highlighted the lack of a centralised, trusted data source for Scotland's retrofit supply chain.
- Stakeholders called for better access to data across skills, case studies, and procurement frameworks.
- There is a clear demand to consolidate fragmented resources into a single data platform to support LHEES delivery and sector growth.

Acquisition of additional data sets:

- Continue to establish data sharing agreements with key accreditation bodies, for example:
  - MCS – data sharing agreement to be confirmed (pending at time of writing)
  - TrustMark – they have offered a data sharing agreement with quoted costs that have been shared with SE to include in future development budgets, if required.
- Integrate with the future 'Scottish Industries Directories' enhancements.
- Establish partnership with academic institutions working on retrofit and energy efficiency to explore data-sharing agreements and shared objectives. For example – Centre For Net Zero High Density Buildings (4 year, £4.5M UKRI funded project led by University of Edinburgh)

Online Form for Self-Submission

- A public-facing online form can be developed, enabling companies to submit their own details (projects, services, locations).
- Submissions could be moderated by SE (or a delivery partner) before being approved and added to the live database.
- This would create a dynamic platform, ensuring that industry engagement drives continuous updating.
- If this processes / feature is introduced, it would allow companies to self-select local authority areas they service. This feature currently is not possible as no direct engagement has been conducted in this phase of the project.

Future Resource Planning & Platform Development

- Move from static Excel to an interactive public-facing platform – this could utilise a platform such as Monday.com linked to a publicly accessible form.
- The database could link with a dashboard or programmes such as PowerBI to create dashboard – the Scottish Construction Industry Data Dashboard is an example of how data could be automatically visualised
- Secure funding for long-term technical support and content moderation, ensuring sustained quality and relevance.
- Develop an interactive, user-friendly portal for ongoing data submissions and updates – establishing capital costs (for build) and ongoing maintenance budgets to ensure updated and industry feel the map is a valuable resource for driving business. This could be linked with the future updates to the Scottish Industries Directories.

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Mapping of Retrofit and Energy Efficiency Companies in Scotland - Report

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