

Accelerating offshore wind and nature protection in the United Kingdom

The Crown Estate: our contribution

Olivia Thomas, Head of Marine Planning and Technical

Our role is to put the nation's interests first

We manage land, property and the seabed across England, Wales and Northern Ireland and return all our profits to benefit the nation.

We're investing and playing a key role in delivering renewable energy and net zero, protecting and restoring nature, and supporting local communities and economic growth nationwide, while creating financial value for the UK.

As an independent business with a £16 billion portfolio we make a lasting impact, both now and for future generations.



The Crown Estate's priorities in addressing national and local needs



Net Zero

Decarbonise our business and contribute to Net Zero for UK



Finance

Factor people, nature and climate impacts into our financial approach



Nature Recovery

Contribute to UK nature recovery through a holistic approach to habitat restoration, land and seabed use



Thriving Communities

Put what matters to the people who live in, work in or visit our places and spaces at the heart of everything we do

We are committed to helping all regions achieve their renewable energy ambition and to create jobs and unlock socio-economic benefits for the people locally

Our Impact



£5bn+

generated over the
past 10 years for
public spending



£1.5bn

commitment to invest in
science and innovation



56,000

potential new homes

12GW

of clean power generated through
offshore wind

15%

of our marginal rural
land to be put aside for
nature recovery

£20m

investment in Rural
Environment Fund to
support farmers with
nature recovery



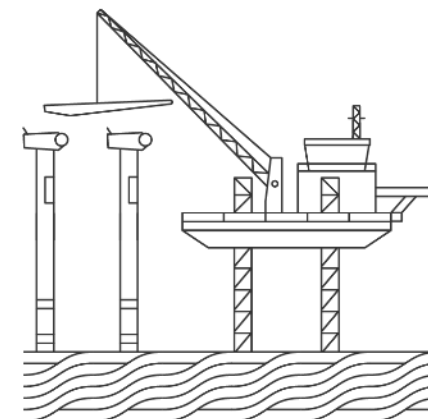
2m+

downloads of Minecraft
Education worlds teaching
about conservation and
renewable energy



Up to £44bn

gross development value of
our regeneration schemes



Up to £400m

investment towards infrastructure
assets that will help to deliver offshore
wind projects

As custodian of our seabed & coastline, managing a wide range of sectors, we have a vital role delivering long-term value for the nation

As an island nation with high population density and valuable wind/natural resources, **the seabed and coastline are critical for the economy, restoring nature and delivering net zero.** Therefore, we have a vital role to play managing this space to deliver long-term value for the nation...

OUR PAN-SECTORAL VIEW

Energy

Offshore wind
Energy conversion
Marine energy

Storage

CCUS
Hydrogen
Natural gas

Infrastructure

Power & Telco
Cables
Pipelines

Minerals

Reclamation
Aggregate dredging
Marine mining

Coastal

Ports and harbours
Aquaculture
Leisure

Habitats

Habitat creation
Biodiversity
Nature recovery

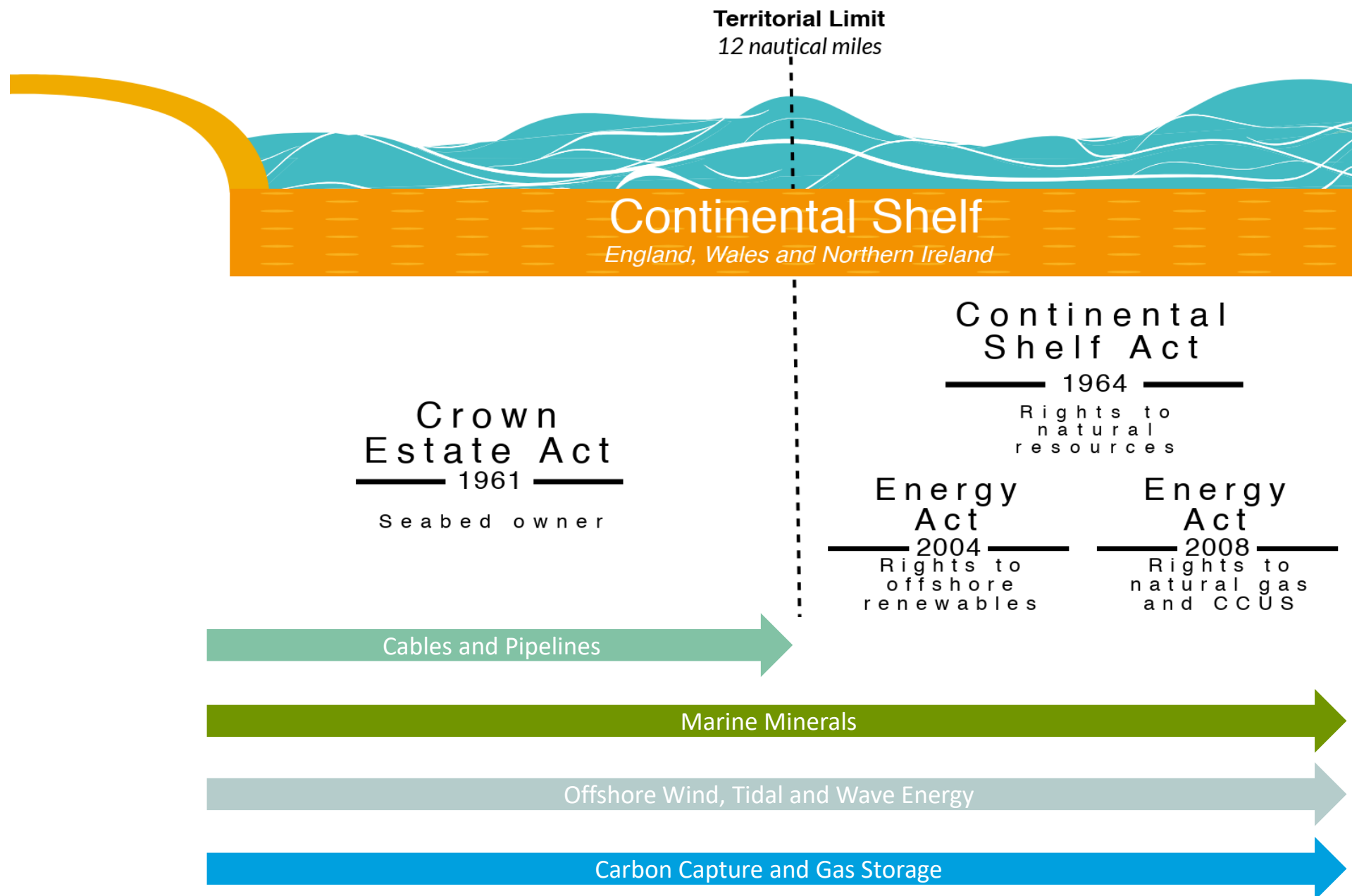
OUR FOOTPRINT

OUR POSITION AND CAPABILITIES

- ✓ **Our clear purpose** to create lasting and greatest value for the nation
- ✓ **Statutory independence** and our ability to take an **objective long-term view**
- ✓ **Our deep expertise and experience** (incl. multi-sector knowledge, data and spatial insight)
- ✓ **Our ability to look across sectors** (e.g. energy, minerals, telecoms) **and nature** balancing competing and complementary demands
- ✓ **Our reputation to convene and partner** with others to bring the marine vision to life

⁵ NB. The Crown Estate has full ownership in territorial waters. TCE has purpose-limited rights covering the continental shelf, these permit the management of certain activities but TCE's control is not exhaustive.

Rights and Regulatory Framework

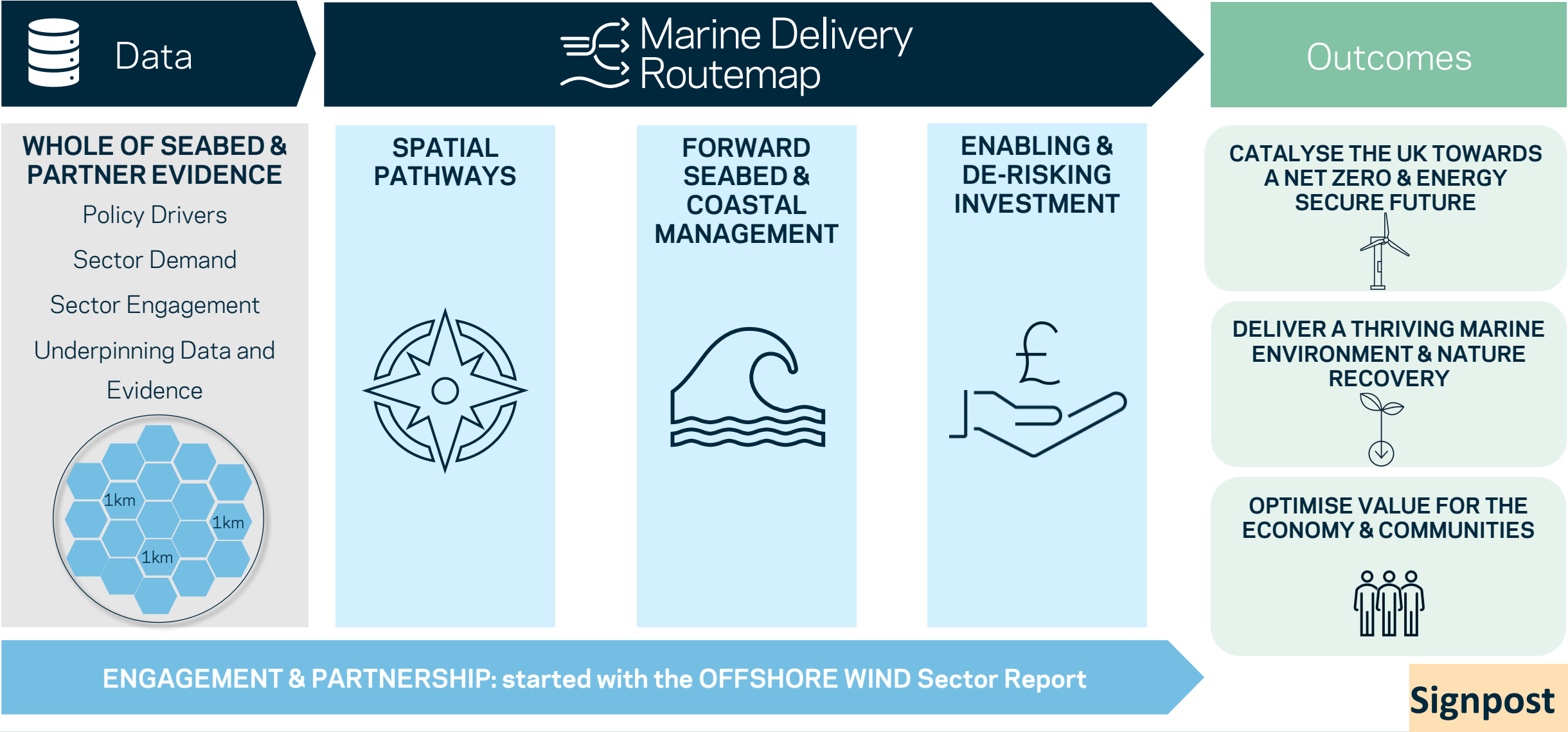


Accelerating Offshore Wind and nature protection:

Key Developments in the last 18 months

- National Energy System Operator (NESO) – Strategic Spatial Energy Plan in development
- Clean Power 2030 (Mission Control)
- Great British Energy
- Industrial Growth Plan
- Round 4 progression into consenting
- CfD Allocation Round 6 (with AR7 announced for early 2026)
- Invest 2035 - Industrial Strategy
- Seabed Leasing Round 5
- Marine Delivery Routemap
- National Biodiversity Strategy and Action Plan (NBSAP): Environment Improvement Plans [England]

Co-developing a Routemap to meet Net Zero & Nature Recovery, deliver a thriving marine economy and support communities...





WHAT IT IS

The Routemap will become The Crown Estate's tool for providing visibility of data and insights on the seabed and coastline around England, Wales and Northern Ireland that can dynamically model and map the potential use scenarios over coming decades.



The Marine Delivery Routemap tool

WHAT IT WILL DO:

- Map out best use of the seabed and coastline, showing what energy, infrastructure and nature investments might take place and when, and securing the best outcomes for the economy, environment and society.
- Speed up clean energy projects and critical infrastructure by enabling planning for what we need to do to accelerate delivery - for example, environmental surveys and grid connections.
- Spark investment in UK supply chain opportunities so communities can plan, for example through developing local skills.

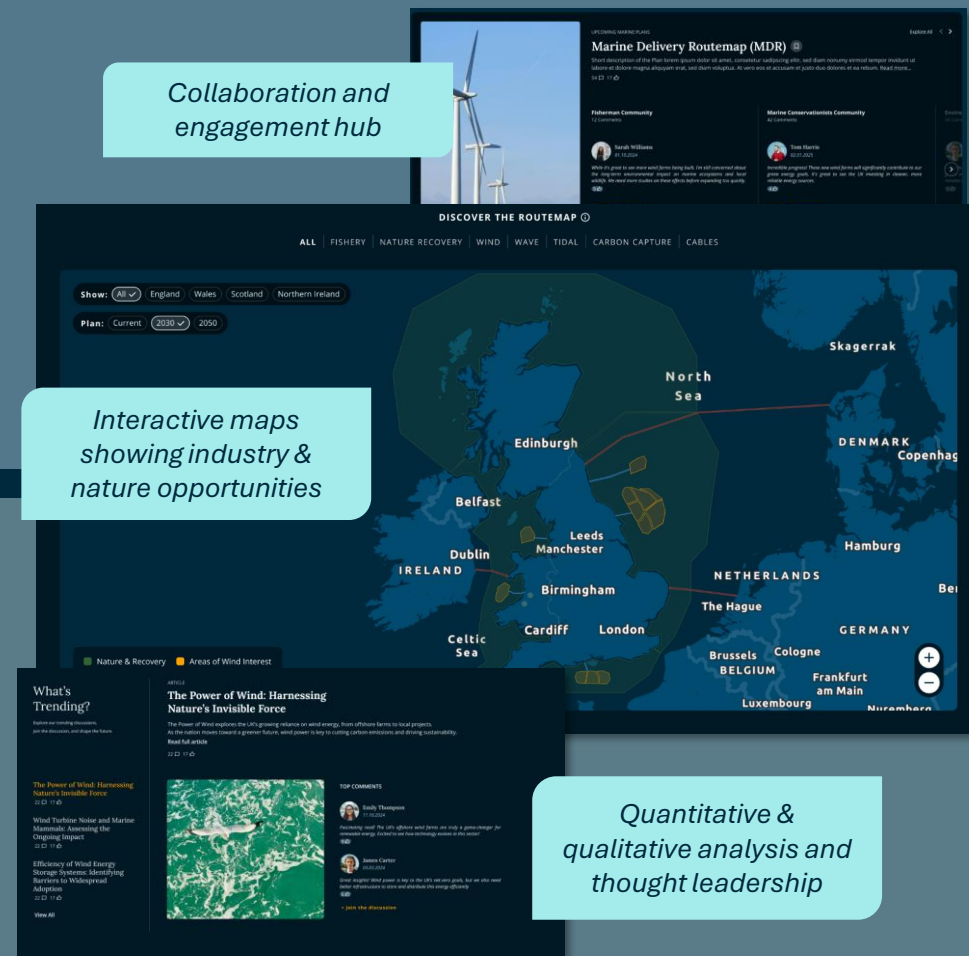
WHAT IT CONTAINS:

- A digital and interactive map for the seabed and coastline built on our world class spatial mapping and digital expertise.
- A long-term delivery plan that identifies when and where key infrastructure and supply chain investments are needed
- A shared evidence base for the seabed and coastline that reflects existing policies and regulation and is informed and used in decision making by Governments, planning and regulatory bodies and public sector delivery partners

Collaboration and engagement hub

Interactive maps showing industry & nature opportunities

Quantitative & qualitative analysis and thought leadership



The Crown Estate's Role in Offshore Wind

- The Crown Estate (TCE) is an independent commercial organisation accountable to UK Government. TCE manages the seabed, similar to Crown Estate Scotland, BOEM (USA), RVO (Netherlands), DEA (Denmark).
- TCE's key roles in offshore wind through Marine Delivery Routemap:
 - Promote efficient use of the marine space, balancing the needs of multiple sectors and stakeholders.
 - Provide world-leading data and evidence.
 - Optimise, de-risk and accelerate future projects.
 - Specifically: define Project Development Areas for offshore wind, collaborate on grid design, undertake environmental assessments (plan-level HRA) and execute leasing rounds.

Current pipeline [UK as a whole] in 2025 OW report:

- **15GW** fully commissioned OW development.
- **13GW** committed (under construction or with support).
- **58GW** under development or in pre-planning.

Looking Ahead...

- TCE will play a crucial role as the UK moves towards having a Strategic Spatial Energy Plan, led by NESO.
- **20-30GW** potential seabed rights to be awarded in England, Wales and NI before 2030.

The Offshore Wind Evidence and Change Programme (OWEC)

Mission Statement:

To facilitate the sustainable and coordinated expansion of offshore wind to help meet the UK's commitments to low carbon energy transition whilst supporting clean, healthy, productive and biologically diverse seas.

- £50 million TCE investment in new research.
- Launched in December 2020 to help deliver the Offshore Wind Sector Deal and ensure the sustainable growth of the sector
- Delivered in partnership with Defra and DESNZ
- Supported and guided by a multi stakeholder group comprising UK Government and Devolved Administrations, their Arms Length Bodies, the offshore wind industry and NGOs



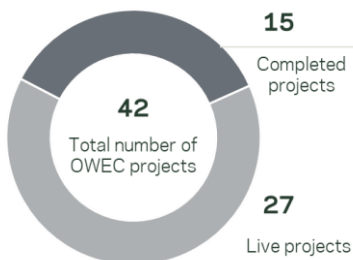
£50m
Investment from The Crown Estate



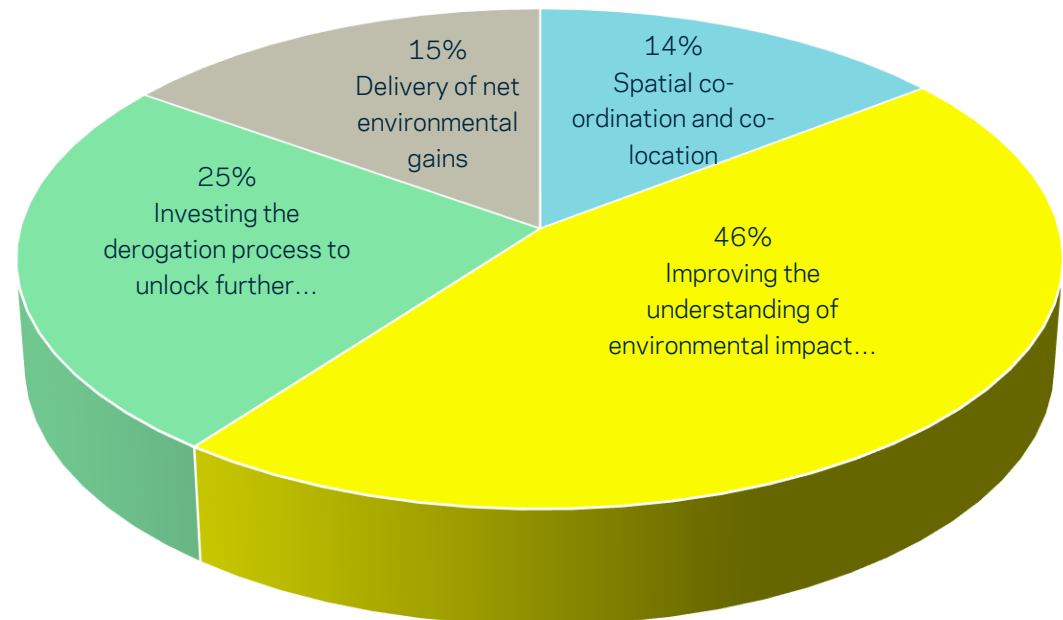
£12m+
Partner contributions to projects



25
Steering group members



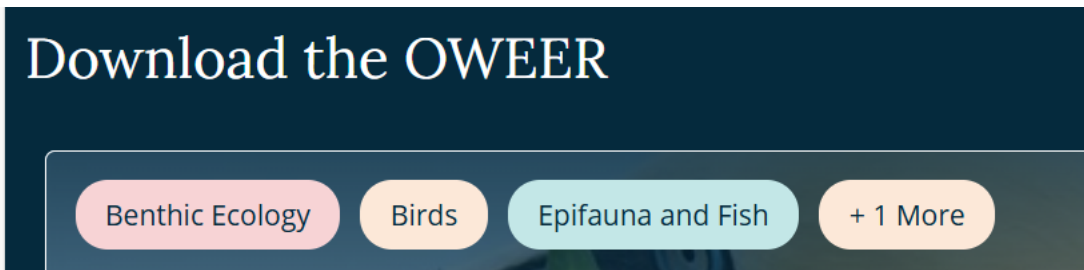
Total Committed Funds by OWEC Theme



Our OWEC Projects



Strategic Compensation Studies



Many thanks!