

Celtic Sea Floating Offshore Wind Leasing Round 5

Market Feedback Report

December 2023



Offshore Wind | THE CROWN
ESTATE

1. Purpose

Further to the engagement journey illustrated in Figure 4 of the Information Memorandum for Round 5, this document summarises the feedback obtained during market engagements, together with the results.

2. Market Feedback

When	With whom	Medium	Feedback sought	Result
Dec 2020	Offshore wind project developers	Email questionnaire	Key needs and capabilities of the market regarding floating wind.	Identified the UK Celtic Sea and >300MW scale as attractive to market, taken forth as principal tenets of Round 5.
Nov 2021	Offshore wind project developers	Digital questionnaire	Offshore wind grid co-ordination; floating foundation technology choice; options for green hydrogen production; ports and supply chain; scale and phasing; co-existence with subsea fibre cables, pairwise analysis for spatial consideration.	Strengthened efforts on collaboration with National Grid ESO and Crown Estate Scotland; and Ofgem; Being agnostic on developers choice of floating foundation tech, their potential inclusion of green hydrogen in projects, and ability to deliver phased projects; focus on integration ports; focus on 1GW projects; step up work with subsea telecoms sector; informed spatial design process.
Jan 2022	Offshore wind project developers	Digital questionnaire	Re-issued November 2021 questions following results of ScotWind seabed auction, to check sentiment.	Strong market interest persists. Increased appetite for GW-scale projects noted and incorporated into design.

When	With whom	Medium	Feedback sought	Result
May 2022	Offshore wind project developers	Digital questionnaire	The Crown Estate performing pre-consent marine surveys in/above the Celtic Sea, with data made public.	Informed scope and design of survey programme.
Jul 2022	Offshore wind project developers	Webinar (Recording)	Spatial design; technical envelope.	Linked structured questionnaire to gather feedback (see next row).
		Digital questionnaire	Directly following July market webinar, seeking feedback on technical envelope and Areas of Search.	Further informed spatial design process - progression to formation of Refined Areas of Search - and parameters of competitive leasing process.
Oct 2022	Offshore wind project developers	Webinar (Recording)	Explain Refined Areas of Search and outline principles of the competitive leasing process.	Linked structured questionnaire to gather feedback (see next row).
		Digital questionnaire	Appetite for unconventional energy export; delivery phasing preference; innovation incentives.	Maintained being open to phased project delivery and green hydrogen featuring in projects.
Jan 2023	Offshore wind project developers; owners/operators of UK ports	Digital questionnaire	Supply chain necessary to support gigawatt-class projects in the UK Celtic Sea, especially investment priorities.	Informed design of port and supply chain commitment in competitive leasing process - with a particular focus on the need for integration ports to be proximate to PDAs.
Feb 2023	Offshore wind project developers	Webinar (Recording)	Pre-consent surveys.	Further refinement to design of survey programme (vessel surveys started in Jul , and aerial surveys started in Sep).

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Mar 2023	Offshore wind project developers	Digital questionnaire	Offshore electricity transmission	Further informed collaboration with National Grid ESO, network operators and Ofgem regarding Holistic Network Design.
July 2023	Offshore wind project developers	Webinar (Recording)	Outline minded-to Project Development Areas (four of 900MW to 1.3GW each, totalling 4GW).	Linked structured questionnaire to gather feedback (see next row).
		Digital questionnaire	Minded-to Project Development Areas (layout, technical parameters and estimated Gigawatt capacities), additional general feedback.	Refinement of and progression to confirmed Project Development Areas (three, each of up to 1.5GW, totalling up to 4.5GW); final adjustments to design of competitive leasing process.
Q1 2024	Potential bidders	In person event, following publication of Information Memorandum.	Live questions and answers.	-

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