

The Crown Estate, RenewableUK and Offshore Wind Industry Council Roundtables

Engagement Update

The Crown Estate (TCE), RenewableUK (RUK) and the Offshore Wind Industry Council (OWIC) held two roundtables with RUK's members to discuss the [Future Offshore Wind \(FOSW\) report](#) (published 11/09/24) on Monday 25 and Wednesday 27 November.

The purpose of the meetings was to present the discussion points included within the report and to hear a range of views. As part of our commitment to engagement and transparency, a summary of what was discussed at both roundtables is outlined below.

Please note that the summaries of discussion represent the views of only those participants that provided comments, rather than a consensus of all attendees unless expressed otherwise.

If you are a developer or investor who was not present at the roundtables and would also like to engage further on the FOSW Report, please contact The Crown Estate at offshorewind@thecrownestate.co.uk to arrange a meeting to discuss the same topics if appropriate.

Roundtable One: OWIC Board (developers only), RUK and TCE Future Offshore Wind Team

This roundtable table was held 14:30 – 16:00 on Monday 25 November 2024, via MS Teams. **The roundtable focussed on the ten discussion points outlined in the report.** The Crown Estate gave an overview of the discussion points and asked those present for any comments. A summary of what was discussed is outlined below.

Summary of Discussion

Grid:

- Entering into an agreement for lease (AFL) alongside a bilateral connection agreement (BCA) had the potential to be a positive way forward.
 - Noted the potential of this arrangement to enable an administratively simpler and commercially reliable grid connection arrangement coupled with seabed leasing.
 - Suggested that this effectively provided a “level playing field” for grid in competitive seabed leasing processes and some respondents felt this would be preferred in order to provide as much certainty as possible.

De-risking and accelerating HRA, offshore surveys and consenting:

- Desire for confidence that a leased site is suitable for offshore wind whilst recognising that there is a limitation to how far TCE can de-risk sites before the next leasing round.
- Respondents wanted to avoid having to repeat surveys that have been undertaken by TCE and requested that TCE ensure that any surveys undertaken will be accepted by Statutory Nature Conservation Bodies (SNCBs).
- Discussed inclusion of cable routes in derisking, if possible.
 - **Note:** TCE noted that it was too early to confirm if this would be the case yet but acknowledged awareness of the risks associated with cable routes.

Future demand:

- Coordination across all of the UK is essential, including lining up with Crown Estate Scotland.
- Pipeline certainty of all potential rounds is essential for market confidence.
- Size of projects could be driven by constraints e.g. HVDC and HVAC, but noted a variety of sizes of projects may put less reliance on much larger projects.
- Queried the need for 20-30 GW to be brought to market before 2030?
 - TCE outlined that we have used the [Future Energy Scenarios \(FES\) 2024: NESO Pathways to Net Zero](#) to inform our view. Noting that we've used a large range due to the uncertainty in demand and attrition rates of projects. We will also be aligning closely with the Strategic Spatial Energy Plan (SSEP).

Leasing Rounds:

- Pipeline certainty and predictability are critical for leasing rounds, and would also support the supply chain.

Technologies

- Preference of flexibility and TCE being technology agnostic.

Due to time, all other discussion points (locations, cross-system coordination, co-location, broad value and hydrogen) were grouped together for comment:

- Participants outlined the following key areas:
 - Importance of derisking to prevent “showstoppers”.
 - Importance that co-location projects don't block each other.
 - Recognition of the unique position of TCE to look at approach systemically.
 - Importance of grid connection in all TCE's considerations.

- Comment that yearly option fees will not drive deployment.

TCE shared that the Marine Delivery Routemap will be key to considering the interactions between sectors (and nature), for working at a system level approach.

Next Steps

TCE outlined further updates on our evolving approach are expected to be shared in the first half of 2025.

Roundtable Two: Offshore Wind Industry Council (OWIC) Grid Working Group, RUK, TCE Future Offshore Wind and Grid Portfolio Team

The roundtable table was held at 14:00 – 15:30 on Wednesday 27 November 2024, in person at TCE's offices.

The roundtable focussed specifically on the grid discussion point outlined in the FOSW Report. The Crown Estate gave an overview of the grid discussion point and its options as summarised below:

- **Option 1:** Developer-led connection application
- **Option 2:** Neso-led connection capacity reservation
- **Option 3:** TCE-led connection application
- **Option 4:** another option we should consider with NESO

Summary of Discussion

- The key ask from the discussion was that NESO and TCE demonstrate alignment in planning of grid connections and seabed leasing for offshore wind, and to try to increase certainty for developers.
- There was general agreement option 1 won't deliver faster grid connections.
- Either option 2 or 3 could work (with a small preference for option 3) but ultimately a bespoke connections process for offshore wind aligned to seabed leasing would be preferred.

Next Steps

TCE will continue to consider its options moving forward.