

Offshore Wind Leasing Round 6 Introduction

These slides include a summary of information shared at a market event on 12 March 2026.



The Crown Estate's purpose

- We're driven by our clear purpose of **creating lasting and shared prosperity for the nation**. By drawing on our values, we aim to address the nation's needs where our unique combination of strengths mean we are best placed to make a difference. Our focus is on long-term, structural challenges facing the country today:
 - Being a leader in supporting the UK towards a net zero carbon and energy-secure future
 - Creating inclusive communities and through our activities supporting economic growth and productivity
 - Taking a leading role in stewarding the UK's natural environment and biodiversity
-

The value we create



Financial

We aim to balance the short-term and long-term, generating profit today while creating value for future generations



Environmental

We support nature recovery, the energy transition and the nation's road to net zero.



Social

We help create inclusive communities and support economic growth and productivity.

Leasing Round 6

The Crown Estate has confirmed its intention to embark on **Leasing Round 6 (LR6)** – a hugely significant moment for us and offshore wind. The key takeaways are:

- Leasing Round 6 is expected to get underway in **first half of 2027**.
 - It will have a likely scale of **around 6GW or more**, subject to **alignment with the energy system**, including NESO's **Strategic Spatial Energy Planning** process.
 - Will be predominantly located off the coast of **North East England**.
 - It will focus on some of UK's remaining opportunities in **with lower water depths** and with access to **established supply chains**.
 - It will result in significant opportunities to contribute to **economic growth** and in the creation of **new on-shore opportunities**.
-

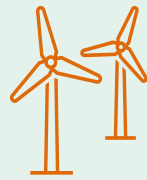


Leasing Round 6 strategic objectives



Energy demand led.

Support the UK's transition to an **energy-secure** and **net zero future** by delivering **around 6GW** of offshore wind capacity in line with the **UK's energy demand** and **market appetite**.



Market attractiveness.

Optimise the use of the seabed by bringing forward **attractive sites** with increased **certainty of consent and grid connection**, in support of **paced and investable** development



Energy-system alignment.

Deliver a leasing round that strengthens an **energy-secure future** by promoting a **systems planning approach** by working with our partners, including **NESO**









Value Creation.

Create opportunities for **inclusive growth** that unlocks potential for communities while responsibly **delivering financial returns**





Market feedback – November 2025 questionnaire

The headlines and The Crown Estate response




Market feedback	TCE's response
 <p>Grid and NESO alignment: alignment with NESO's Strategic System Energy Plan is a critical pre-condition for developer interest in the next leasing round.</p>	<ul style="list-style-type: none"> - System-led approach to LR6 and early confirmation of alignment and compatibility with NESO's Strategic Spatial Energy Plan
 <p>Tender design: greater visibility of tender design pre-IM and criteria in advance is important to enable bidders to prepare and participate.</p>	<ul style="list-style-type: none"> - Reviewing LR6 tender criteria, further market engagement planned, aim to provide key qualification criteria ahead of IM
 <p>Commercial model: many developers expressed concerns on high upfront costs, and suggest The Crown Estate consider alternative approaches.</p>	<ul style="list-style-type: none"> - The Crown Estate reviewing a range of commercial approaches for LR6
 <p>Location specific interest: developers supportive of a near-term leasing round, on basis that this enables fixed-bottom offshore wind opportunities and sites supporting lower LCOE and consenting risk.</p>	<ul style="list-style-type: none"> - Routemap-led spatial refinement to support attractive LR6 sites, considering cost, and technical and consenting risk
 <p>Pipeline visibility: pipeline visibility beyond 2030 is important for market confidence, and visibility more important than faster leasing</p>	<ul style="list-style-type: none"> - Launch of Routemap and publication of opportunity areas
 <p>Uncertainty of OW capacity demand: big variety in response to the required capacity for the next leasing round and future 20-30 GW.</p>	<ul style="list-style-type: none"> - Continued close working with Government and NESO to refine the capacity range, in line with SSEP and policy

Ref: GES_2026_p0008
Date: 17/03/2026



© Crown Copyright 2026, all rights reserved. Reproduction in whole or part is not permitted without prior consent of The Crown Estate. Limits Supplied by UKHO. Scottish Wind Agreements provided by Crown Estate Scotland. European Wind Areas provided by IFC.


-  Offshore Wind Leasing Round 6 – Refined Area of Search
-  Priority Area - Medium-term
-  Potential Area of Opportunity
-  Northern Ireland Marine Area *

Offshore Wind

-  Offshore Wind Agreements - The Crown Estate
-  Offshore Wind Agreements - Crown Estate Scotland
-  Offshore Wind Agreements - Europe

Base Mapping

-  UKHO Territorial Waters Limits
-  Renewable Energy Zone Limit and UK Continental Shelf

 Indicative size of 1GW Wind Agreement at 5MW/km² (200km²)

Example: Delivery of 6GW of additional offshore wind would require 12% of the Round 6 RAoS

* Future Offshore Wind opportunity in Northern Ireland will be reviewed after publication of the NI Strategic Environmental Assessment (SEA)

The locations shown are subject to further refinement to identify much smaller project development areas

What it is

An interactive digital tool designed to improve information and decision making about the future of our seas. The Routemap can dynamically model and map potential use scenarios for the seabed and coastline around England, Wales and Northern Ireland over coming decades.



The Marine Delivery Routemap

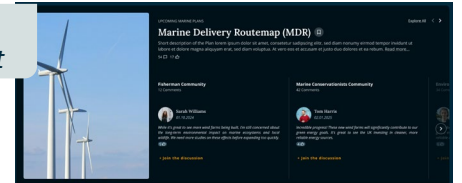
WHAT IT WILL ENABLE:

- A clear understanding about future opportunities for the seabed and coastline, showing where energy, infrastructure and nature investments might take place and when, enabling the best outcomes for the economy, environment and society.
- Speed up clean energy projects and critical infrastructure by enabling collective planning what we need to do to accelerate delivery
- Spark investment in UK supply chain opportunities so communities can plan, for example through developing local skills.

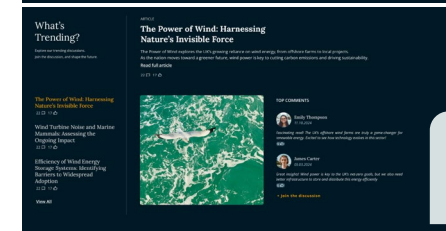
WHAT IT CONTAINS:

- The first-ever interactive tool showing future opportunities for the seabed and coastline built on our world-class spatial mapping and digital expertise.
- A long-term tool to help identify 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 by stakeholders.

Collaboration and engagement



Interactive maps showing industry & nature opportunities



Transparent and evidence based to inform decisions

Leasing Round 6 strategic system alignment

- **Round 6 spearheads the UK's strategic approach to energy and seabed planning**, and will be the country's first fully system aligned leasing round through alignment with NESO's Strategic Spatial Energy Plan (SSEP) and Centralised Strategic Network Plan (CSNP).
- Through TCE's spatial refinement of the seabed we **believe LR6 can accommodate around 6GW of offshore wind**, subject to **NESO's strategic plan for the energy system** and further market and stakeholder engagement.
- NESO and TCE will collaborate to ensure locations and capacities of final LR6 Project Development Areas **align with the SSEP and CSNP**.



Next steps

- Round 6 is expected to get underway in **the first half of 2027**. Ahead of this, an extensive programme of market and stakeholder engagement is underway, covering activity like:
 - Further refinement of the identified seabed areas into a number of final Project Development Areas. This will include consideration of any potential impacts on nature, important fisheries areas and other interests.
 - Further technical collaboration with NESO to align with strategic energy plans. This includes finalising the scale (GW) of Round 6.
 - Further work on the commercial approach and tender model, including how Round 6 can unlock new social and economic opportunities.
 - A programme of additional work to support the consenting process, including a programme-level Habitats Regulations Assessment and the commissioning of ecological surveys.

