

Colin Maciver
September 2020



37,000h

across 4 rural
estates, coastline
and seabed



2,000

tenants



employees across
Scotland



offshore wind in agreements
(at Dec 2019)



£70m

investment commitment
2020-23



£20.4m

generated for public
spending 2017-19



3,600

agreements across land, coastline and seabed

125



moorings associations
supported

5,000



hectares forestry

Scottish context: Offshore Renewables Leasing and Planning



Crown Estate Scotland are the seabed manager

- Crown Estate Scotland grants a lease of the seabed only when the consents and other required permissions are in place

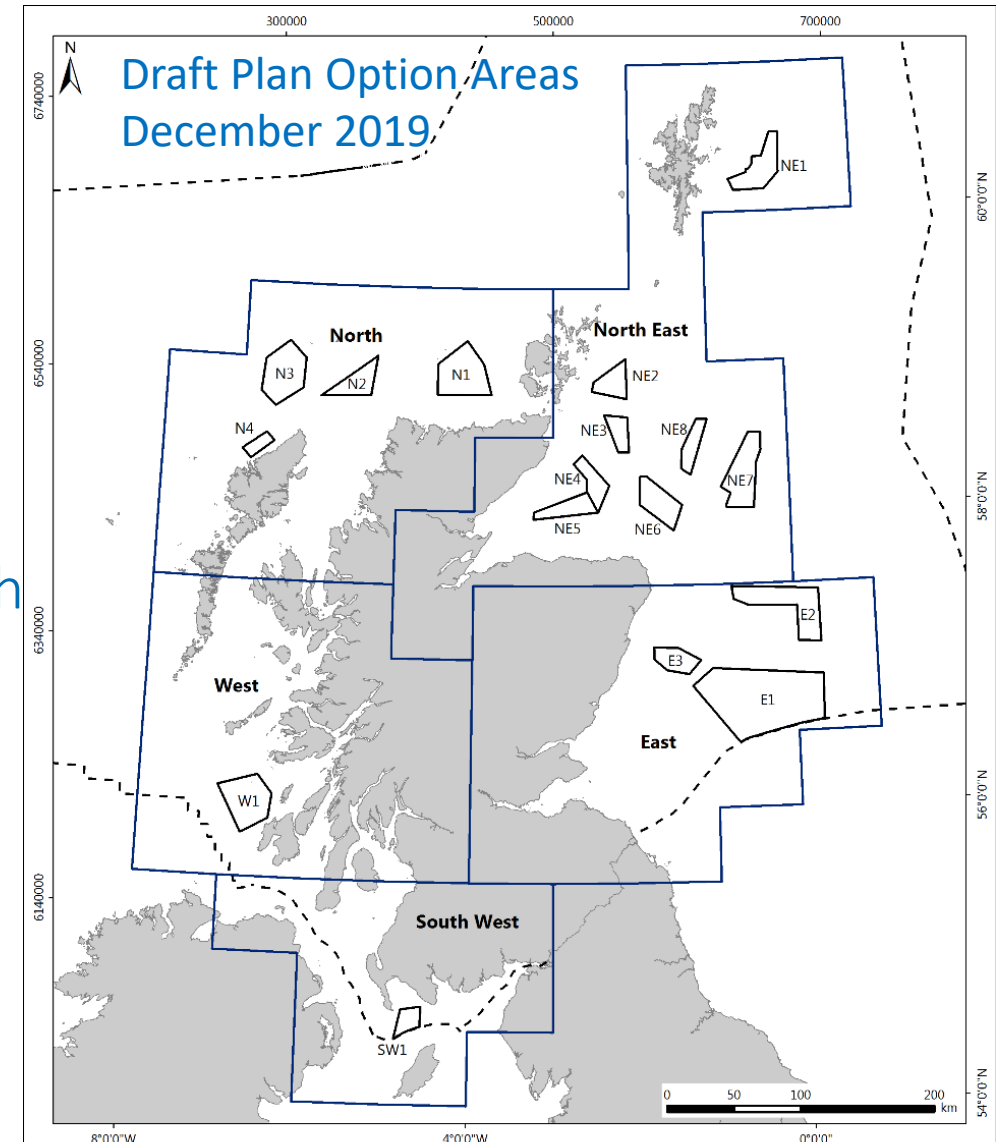


Marine Scotland are the regulator and responsible for strategic marine planning

- Marine Scotland grants consents for projects

Marine Scotland: Sectoral Marine Plan

- Defines the areas available for ScotWind Leasing
- Consultation on the Draft Plan closed in March 2020
- Launch documents are based on information in the draft plan
- Adopted plan expected Autumn 2020
- Final Leasing requirements will align with the adopted plan



**Crown Estate
Scotland**
Oighreachd a' Chrùn Alba

Asset Manager

- Facilitate and optimise use of the seabed.
- Manage existing Leases and property agreements; our profit goes to the Scottish Government.
- Supporting projects and sectors to help deliver value to Scotland's communities.



ASSET MANAGER

Careful management of leases and agreements.



**Crown Estate
Scotland**
Oighreachd a' Chrùin Alba

ScotWind Leasing

- Offer successful applicants the chance to build Scotland's new generation of offshore wind farms
- Maximise the contribution of offshore wind to Scotland's net zero ambition
- Deliver large capital projects which will help to power an energy transition for Scotland's economy



**Crown Estate
Scotland**
Oighreachd a' Chrùin Alba

Supporting the sector

- Supporters and funders of strategic research
- Work in partnership to develop existing and emerging technologies that offer significant potential value to Scotland and energy transition
- Key studies – floating wind & energy systems.



ENABLER

Empowering others by supporting local plans and projects, providing access to property and helping address barriers to sector growth.



**Crown Estate
Scotland**
Oighreachd a' Chrùin Alba

SOWEC

- Partnership between the public sector and the offshore wind industry
- Scotland-wide response to the Offshore Wind Sector Deal and focus on specific shared priorities in Scotland
- Increased opportunity for collaboration with other industries or sectors in particular those linked to Energy Transition, Blue Economy, or Net Zero
- Crown Estate Scotland has provided funding is available for deliverables which contribute towards the SOWEC vision and goals



**Crown Estate
Scotland**
Oighreachd a' Chrùin Alba

Macroeconomic benefits of floating offshore wind in the UK

The Scope of this work -

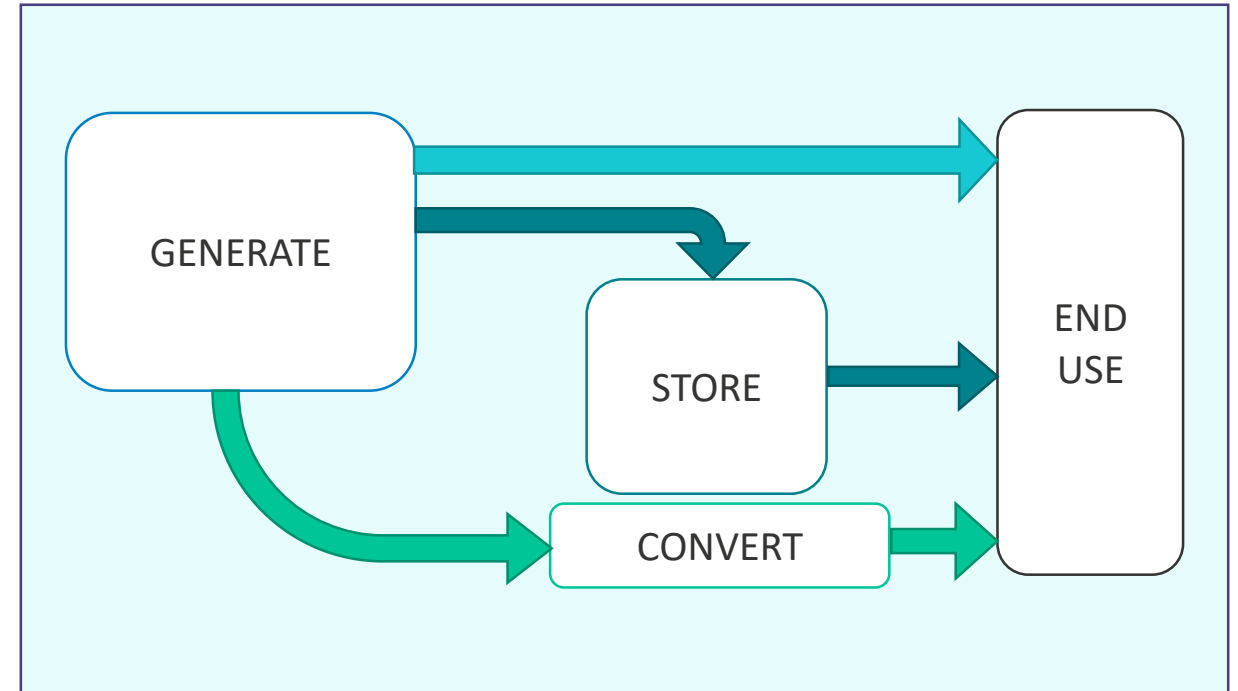
- Commissioned Offshore Renewable Energy Catapult to set out the potential macroeconomic early stages of UK floating wind deployment consequences of public policy support for FOSW.
- Different types and costs of government support that may be needed.



**Crown Estate
Scotland**
Oighreachd a' Chrùin Alba

Energy Systems

- Commitment to a programme of work to investigate how the assets we manage interact with the necessary shift to decarbonise energy systems.



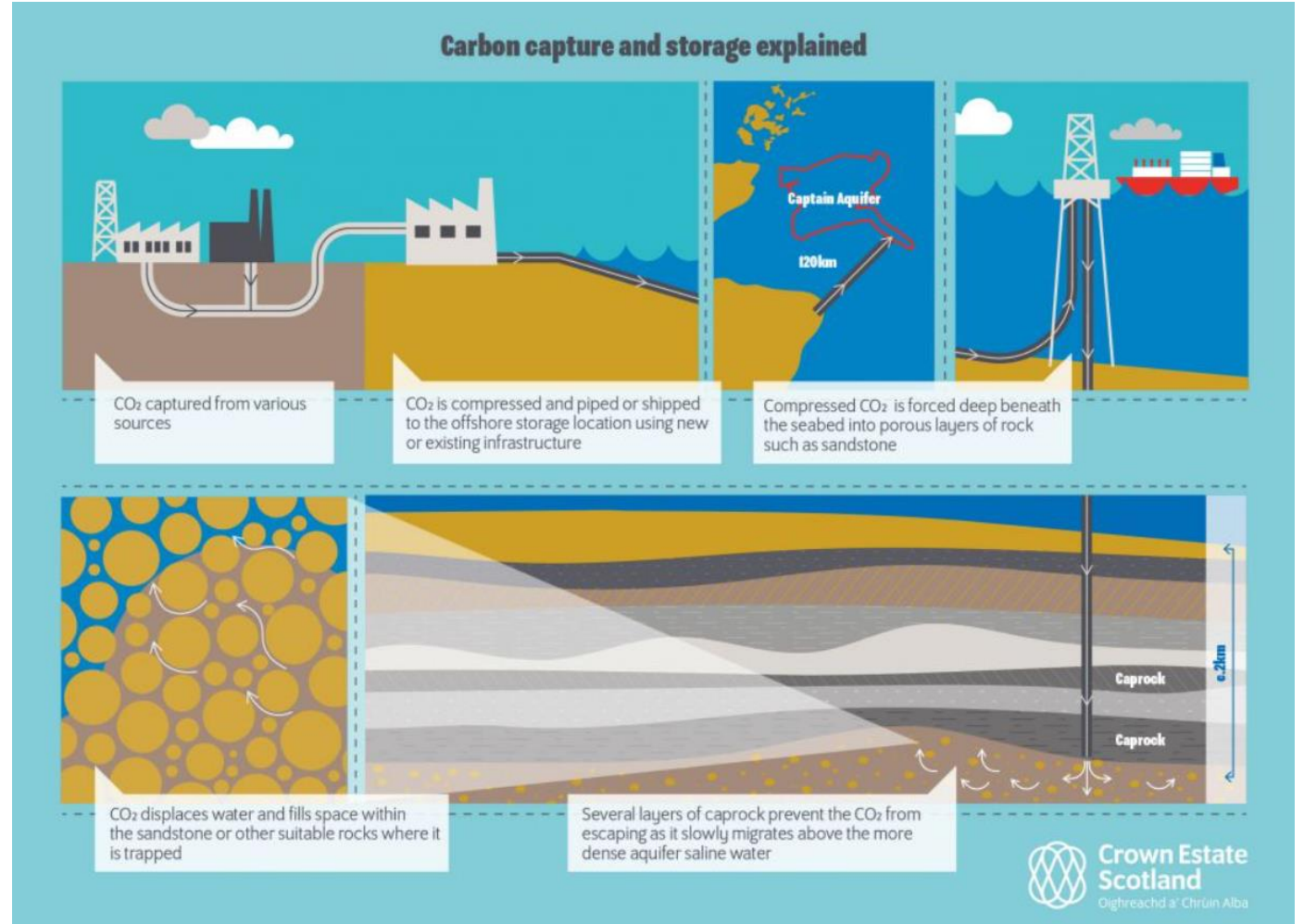
Green Hydrogen

- OSW is emerging as a lead opportunity for offshore green hydrogen production.
- Hydrogen production is an area of focus for the offshore wind Sector Deal
- The future demand from domestic and export markets supports significant future deployment scenarios.



Blue Hydrogen & CCS

- CCS is a necessity to reach Net Zero commitments.
- Creates an opportunity for future clean and sustainable industrial growth.
- Acorn Project delivery in early 2020s – CCS & Hydrogen



Energy Integration

- Crown Estate Scotland is supportive of Energy Integration aspirations and is looking forward to engaging with industry and government to deliver shared ambitions.
- We recognise that there may be specific requirements of both greenfield and brownfield electrification projects.
- CCS, cables, and pipelines are a key feature of our asset portfolio and Energy Integration highlights some opportunities and further work which will be supported by CES.