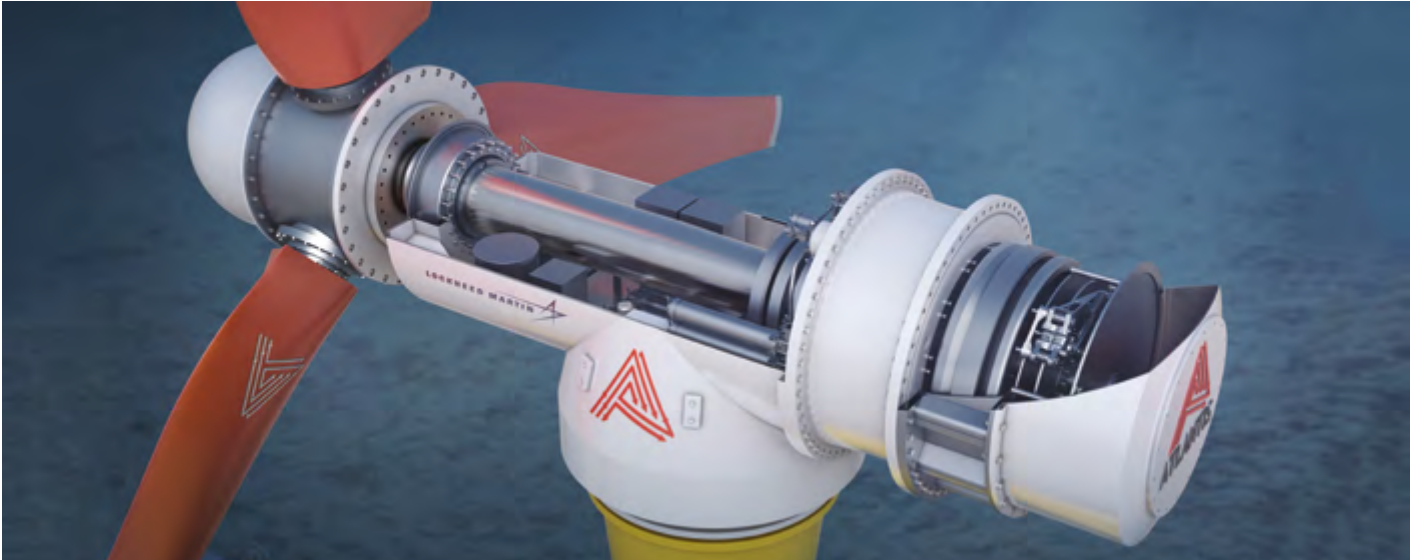


Energy and infrastructure key facts 2015-16

UK ocean energy



UK ocean energy industry – world renowned resources and world leading infrastructure for technology and project development

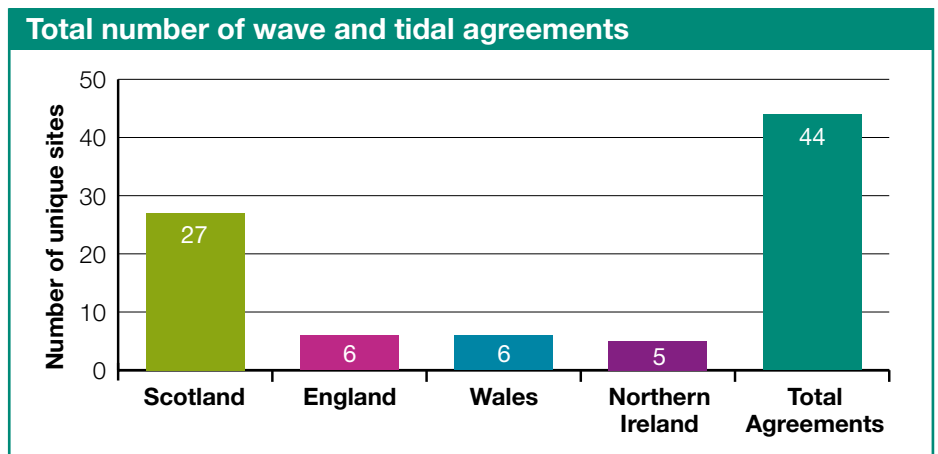
The UK's growing ocean energy industry benefits from world class resources in terms of natural resources, test facilities and supply chain.

The Crown Estate is playing a key role in helping the emerging tidal current and wave sectors grow, by providing wave and tidal developers with exclusive rights to explore areas of the seabed through agreements for lease which lead to the award of full leases for construction and operation. To date, we have leased over 40 wave and tidal projects in the UK covering engineering small scale prototype demonstrations through to large demonstration zones. The sites are currently being developed by a range of organisations.

In 2014 an important leasing round concluded, agreeing seabed rights for six new demonstration zones. The demonstration zones will for the first time enable locally-based third party managers to manage and sub-let parts of the seabed to developers.

The number of future interest enquiries right across the UK for both wave and tidal technologies indicate a continuing interest in development in the UK.

In addition to leasing, we have invested £10 million into the MeyGen Inner Sound project in the Pentland Firth alongside Atlantis Resources Limited and co-investors DECC, Scottish Enterprise and Highlands and Islands Enterprise. This 6MW array will be the first commercial tidal array project in the world. Our investment demonstrates our commitment to unlocking the rich potential of our physical resources. By applying targeted capital and sharing our know-how, we aim to catalyse this sector and maintain the UK's global lead in offshore renewables.



Tidal projects

Managed test facility

No.	Project name
01	EMEC Fall of Warness
02	EMEC Shapinsay
03	EMEC Stronsay Firth
04	Perpetuus Tidal Energy Centre (PTEC)

Demo zone

No.	Project name
05	Islay Demo Zone
06	North Devon Demo Zone
07	West Anglesey Demo Zone

Engineering demo

No.	Project name
08	Bluemull Sound
09	Mull of Kintyre
10	Ness of Cullivoe, Shetland
11	Ramsey Sound
12	Sanda Sound
13	SeaGen, Strangford Lough
14	Strangford Lough

Commercial demo

No.	Project name
15	Holyhead Deep
16	Kyle Rhea
17	Skerries
18	Sound of Islay
19	St David's Head

Commercial

No.	Project name
20	Brims Tidal Array
21	Brough Ness
22	Fair Head
23	Inner Sound
24	Isle of Islay
25	Lashy Sound
26	Mull of Galloway
27	Ness of Duncansby
28	Portland Bill
29	Strangford Lough
30	Torr Head
31	Westray South

Wave projects

Managed test facility

No.	Project name
32	EMEC Billia Croo
33	EMEC Scapa Flow
34	FabTest, Falmouth Bay
35	Wave Hub

Demo zone

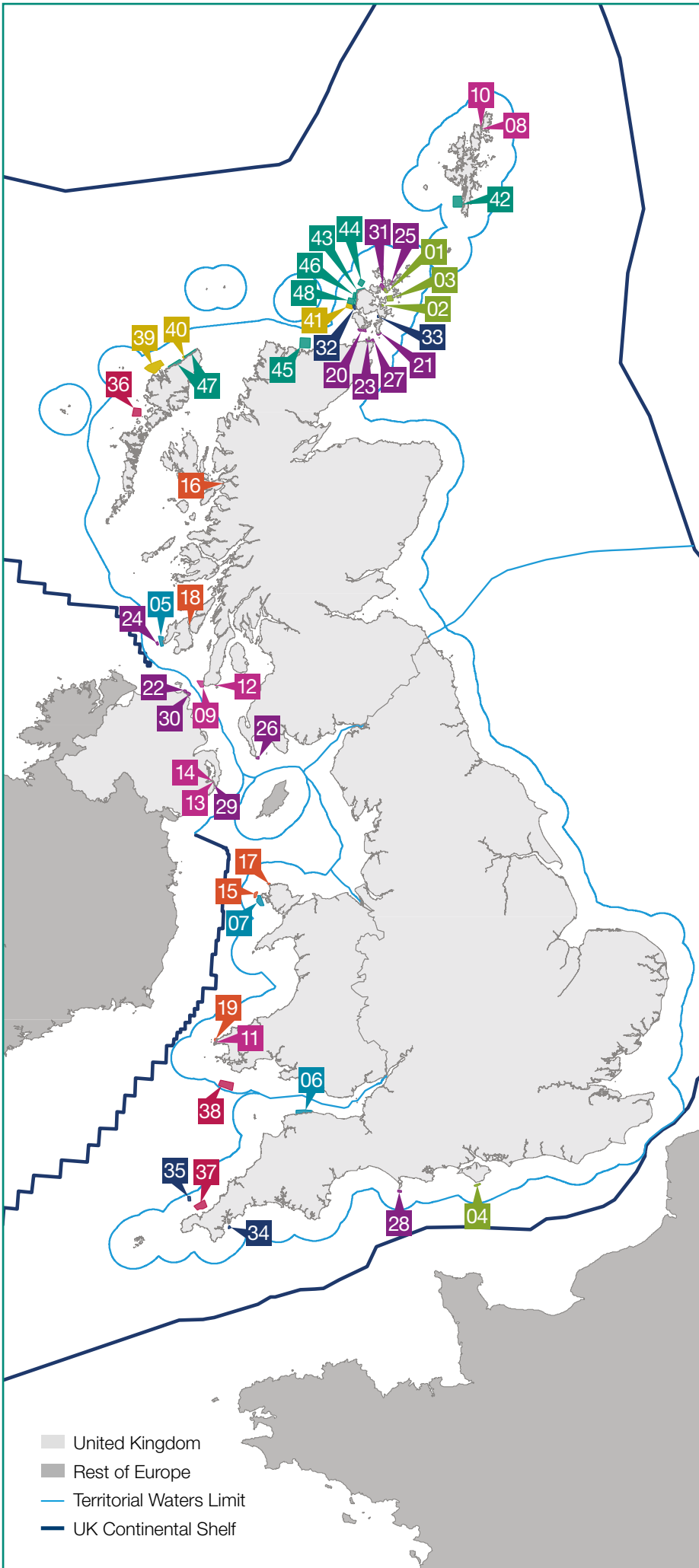
No.	Project name
36	Harris Demo Zone
37	North Cornwall Demo Zone
38	South Pembrokeshire Demo Zone

Commercial demo

No.	Project name
39	Benera, Isle of Lewis
40	Galson, Isle of Lewis
41	West Orkney South

Commercial

No.	Project name
42	Aegir
43	Brough Head
44	Costa Head
45	Farr Point
46	Marwick Head
47	North West Lewis
48	West Orkney Middle South



The UK is home to some of the best test facilities in the world, including...



3 non-grid connected



2 grid connected



2 demonstration arrays

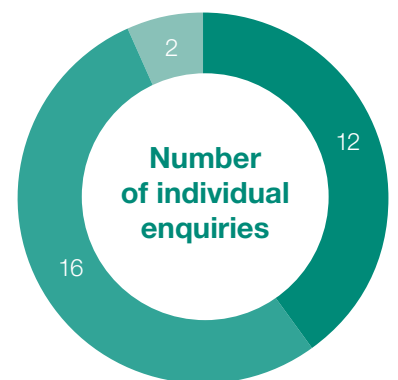


6 demonstration arrays

£10m

invested in constructing the world's first commercial tidal current array, through a £10m investment in the MeyGen project.

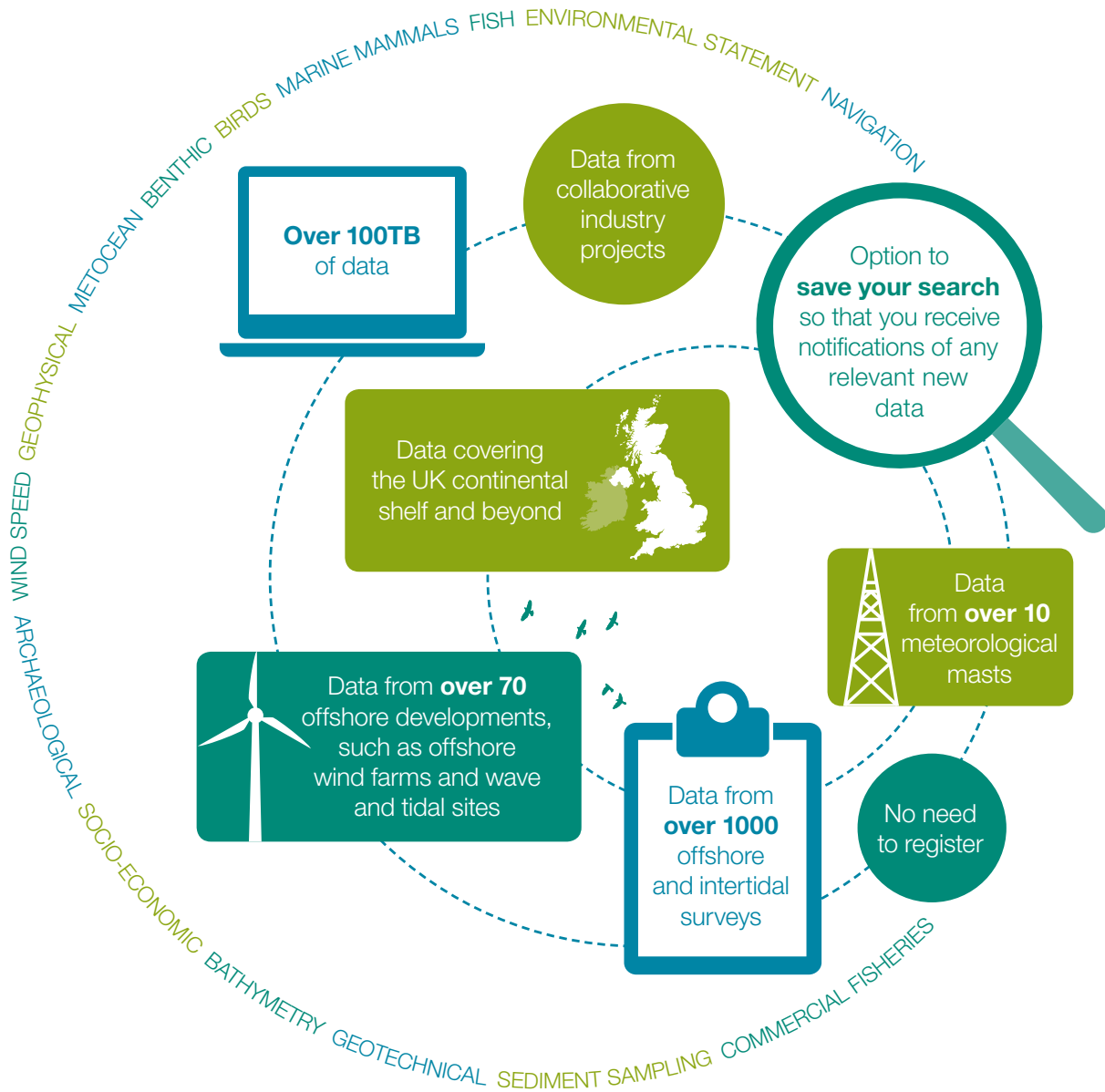
Future interest per technology type



■ Wave
 ■ Tidal current
 ■ Both

The Marine Data Exchange

The Marine Data Exchange provides **free access** to survey data and reports collected throughout the lifetime of an offshore project – from pre-construction through to decommissioning – by working closely with our offshore tenants to capture and advocate the sharing of survey data.
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Correct as of April 2015. Cover images courtesy of Statoil (top and bottom) and SSE (middle).