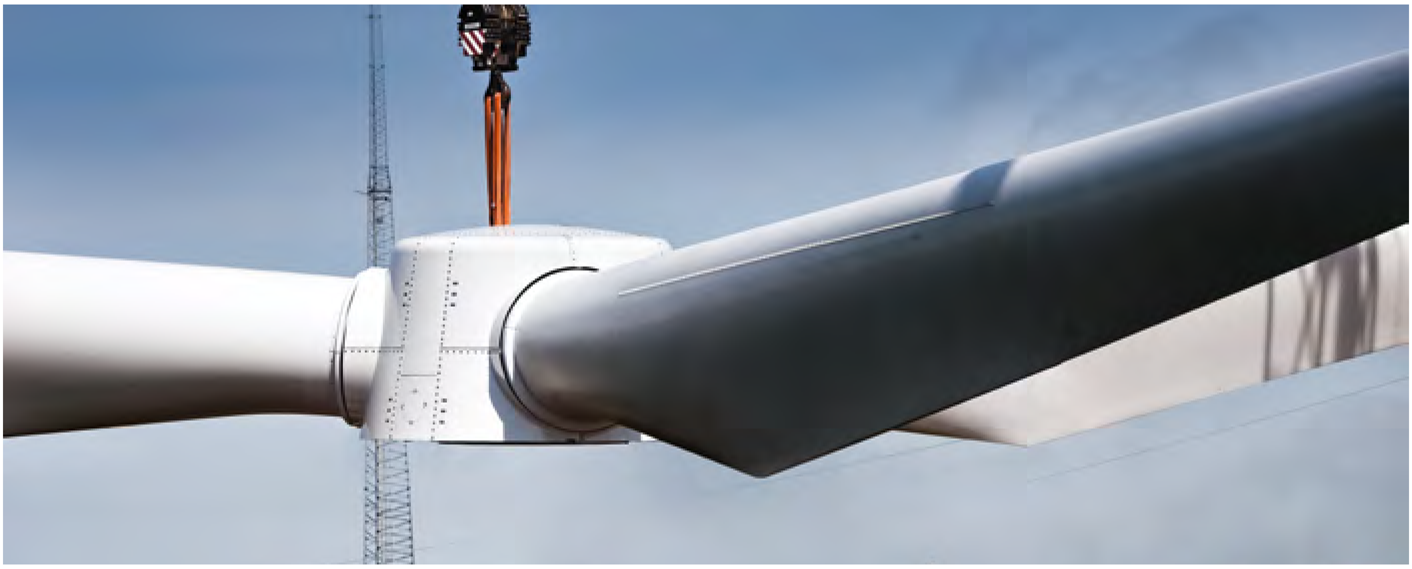
THE CROWN ESTATE

Energy and infrastructure key facts 2015-16

UK offshore wind



As manager of the UK seabed we take a strategic role in managing this asset sustainably and creating long term value

UK offshore wind project pipeline – April 2015

Operational: Total capacity of wind farms that have been fully commissioned.

No.	Project name	Capacity MW
01	Barrow	90
02	Blyth	4
03	Burbo Bank	90
04	Greater Gabbard	504
05	Gunfleet Sands Demonstration	12
06	Gunfleet Sands I	108
07	Gunfleet Sands II	65
08	Inner Dowsing	97
09	Kentish Flats	90
10	Lincs	270
11	London Array 1	630
12	Lynn	97
13	Methil Demonstration – Samsung	7
14	North Hoyle	60
15	Ormonde	150
16	Rhyl Flats	90
17	Robin Rigg East	90
18	Robin Rigg West	90
19	Scroby Sands	60
20	Sheringham Shoal	317
21	Teesside	62
22	Thanet	300
23	Walney (Phase 1)	184
24	Walney (Phase 2)	184
25	West of Duddon Sands	389
Total		**4,039**

Under construction: Total capacity of wind farms that are under construction or where the developer has confirmed a final investment decision, but are not yet fully operational.

No.	Project name	Capacity MW
26	Burbo Bank Extension	258
27	Dudgeon	402
28	Gwynt y Môr	576
29	Humber Gateway	219
30	Kentish Flats Extension	50
31	Westermost Rough	210
Total		**1,715**

Government support on offer: Total capacity of wind farms that have secured a Contract for Difference or whose publicly stated timescales are consistent with accessing the Renewables Obligation (RO).

No.	Project name	Up to capacity MW
32	Beatrice	664
33	Blyth Demonstration	99
34	East Anglia ONE	714
35	Galloper[1]	340
36	Heron Wind (Hornsea)	600
37	Neart na Gaoithe (NNG)	448
38	Njord (Hornsea)	600
39	Race Bank[1]	580
40	Rampion[1] (Southern Array)	400
41	Walney Extension	660
Total		**5,105**

Consented: Total capacity of wind farms that have planning consent and for which government support is not yet in place.

No.	Project name	Up to capacity MW
42	Aberdeen Demonstration	66
43	Creyke Beck A (Dogger Bank)	1,200
44	Creyke Beck B (Dogger Bank)	1,200
45	East Anglia ONE	486
46	Inch Cape	784
47	MacColl (Moray Firth)	372
48	Rampion (Southern Array)	300
49	Seagreen Alpha (Firth of Forth)	525
50	Seagreen Bravo (Firth of Forth)	525
51	Stevenson (Moray Firth)	372
52	Telford (Moray Firth)	372
53	Triton Knoll	1,200
Total		**7,402**

In planning: Total capacity of wind farms for which a consent application has been submitted.

No.	Project name	Up to capacity MW
54	Breesea (Hornsea)	900
55	Hywind 2 Demonstration (Buchan Deep)	30
56	Navitus Bay (West Isle of Wright)	970
57	Optimus (Hornsea)	900
58	Teesside A (Dogger Bank)	1,200
59	Teesside B (Dogger Bank)	1,200
Total		**5,200**

Pre-planning: Total capacity of wind farms for which a consent application has not been submitted.

No.	Project name	Up to capacity MW
60	2-B Demo	14
61	East Anglia THREE	1,200
62	East Anglia FOUR	1,200
63	Islay	690
64	Teesside C (Dogger Bank)	1,200
65	Teesside D (Dogger Bank)	1,200
Total		**5,504**

Wind Farm Areas of Search

No.	Project name
66	Dogger Bank
67	East Anglia
68	Firth of Forth
69	Hornsea
70	Moray Firth
71	Southern Array
72	West Isle of Wight

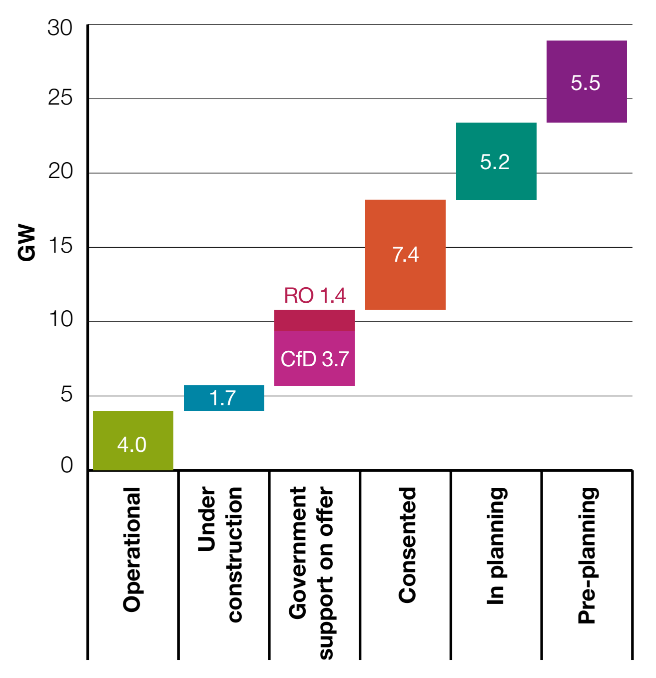
1 RO feasible based on published grid connection dates as per TEC register – Mar 2015

NOTE: Quoted capacity refers to the property rights held with The Crown Estate and does not necessarily reflect the build out capacity permissible under current or future statutory planning permissions.

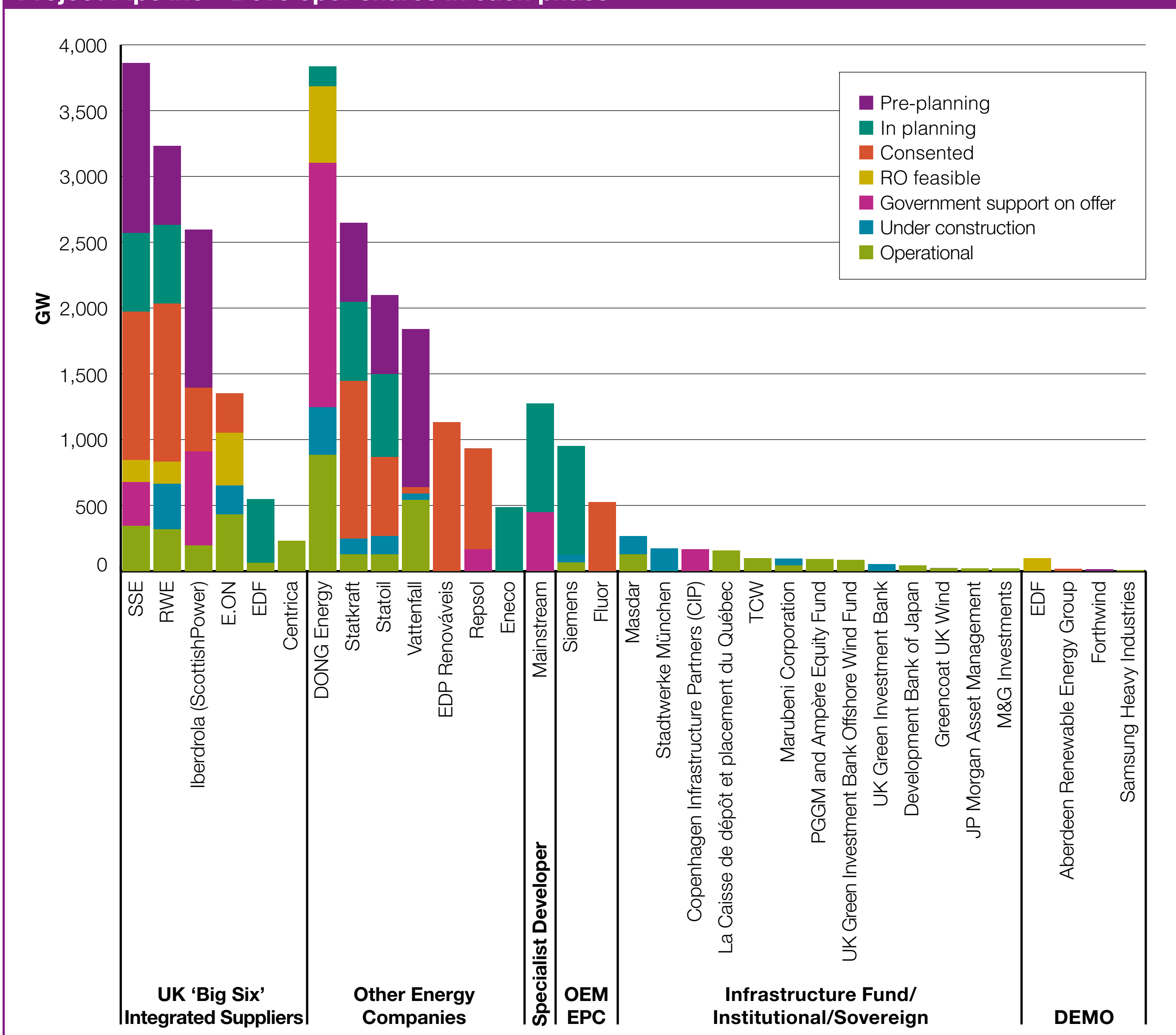
2014 was a landmark year for the UK offshore wind industry. We passed significant milestones, one of which is having four gigawatts of capacity now in operation – enough to meet the electricity demands of nearly 3.2 million households and more installed capacity than any other country. There were also substantial investment announcements, such as that from Siemens and AB Ports for manufacturing facilities in the Humber area of northeast England, and financing from the UK government's Green Investment Bank to support the construction of two major projects and the establishment of a £1bn offshore wind fund.

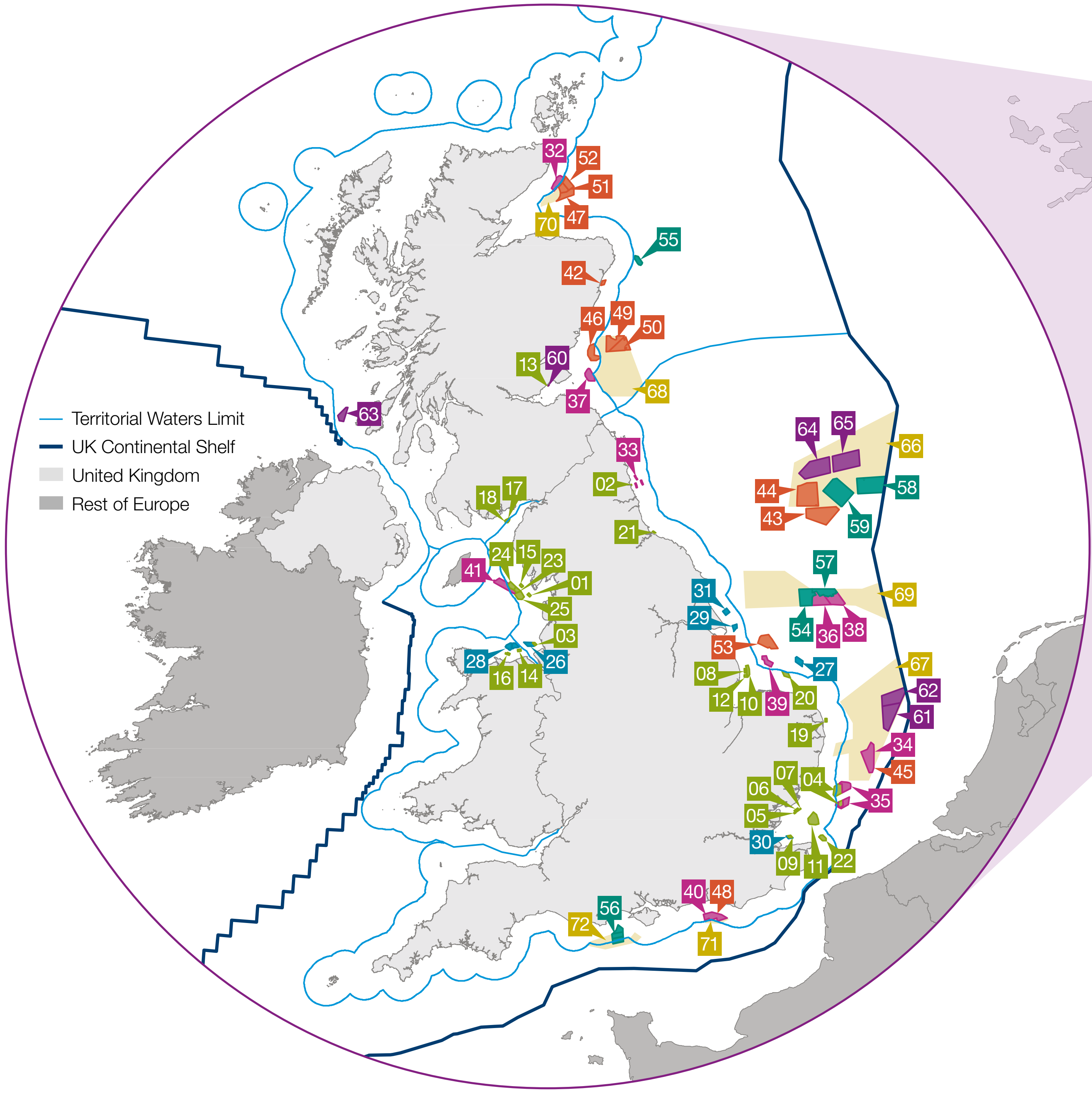
This is now a multi-billion-pound market that is poised for double-digit growth at least until 2020. As a result, the UK continues to be the most attractive place to invest in offshore wind globally, with fantastic natural resources and a project pipeline that comfortably meets the most demanding UK government scenarios for the short and medium terms. We estimate that offshore wind will meet around ten per cent of the UK's electricity demand in 2020, confirming its material contribution to the UK's target of 15 per cent renewable energy by that year.

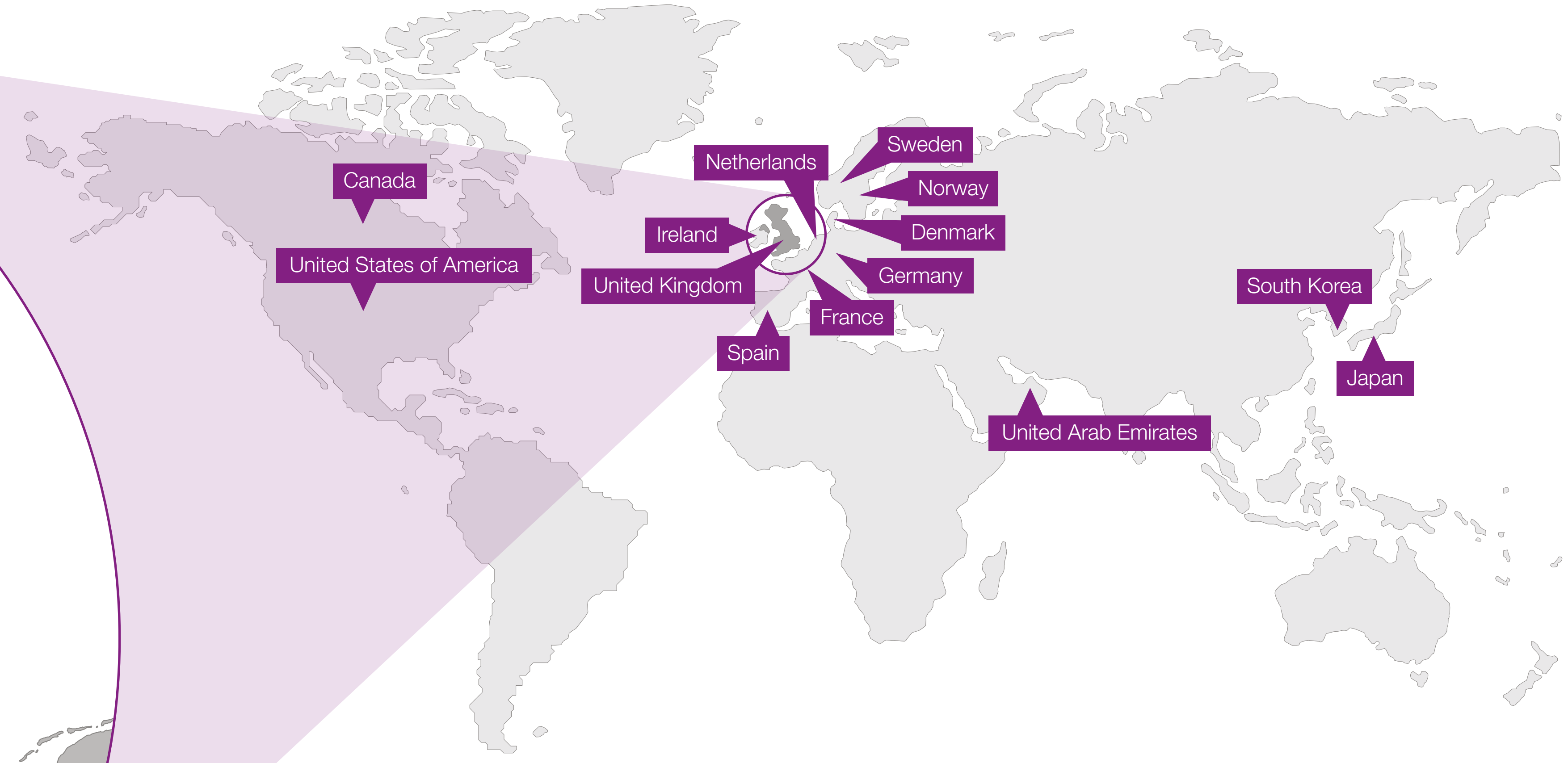
UK offshore wind project pipeline



Project Pipeline – Developer shares in each phase







Canada
- La Caisse de dépôt et placement du Québec

Denmark
- Copenhagen Infrastructure Partners (CIP)
- DONG Energy

France
- EDF

Germany
- E.ON
- RWE
- Siemens
- Stadtwerke München

Ireland
- Mainstream

Japan
- Development Bank of Japan
- Marubeni Corporation

Netherlands
- Eneco
- PGGM and Ampère Equity Fund

Norway
- Statkraft
- Statoil

South Korea
- Samsung Heavy Industries

Spain
- EDP Renováveis
- Iberdrola (ScottishPower)
- Repsol

Sweden
- Vattenfall

United Arab Emirates
- Masdar

United Kingdom
- Aberdeen Renewable Energy Group (AREG)
- Centrica
- Greencoat UK Wind
- JP Morgan Asset Management
- M&G Investments
- SSE
- UK Green Investment Bank
- UK Green Investment Bank Offshore Wind Fund

United States of America
- Fluor
- TCW

13.4TWh of electricity generated in 2014 – about 4% of UK supply – enough to power 3.2 million homes

1,550

There are 1,550 offshore turbines in operation or under construction

5.7GW

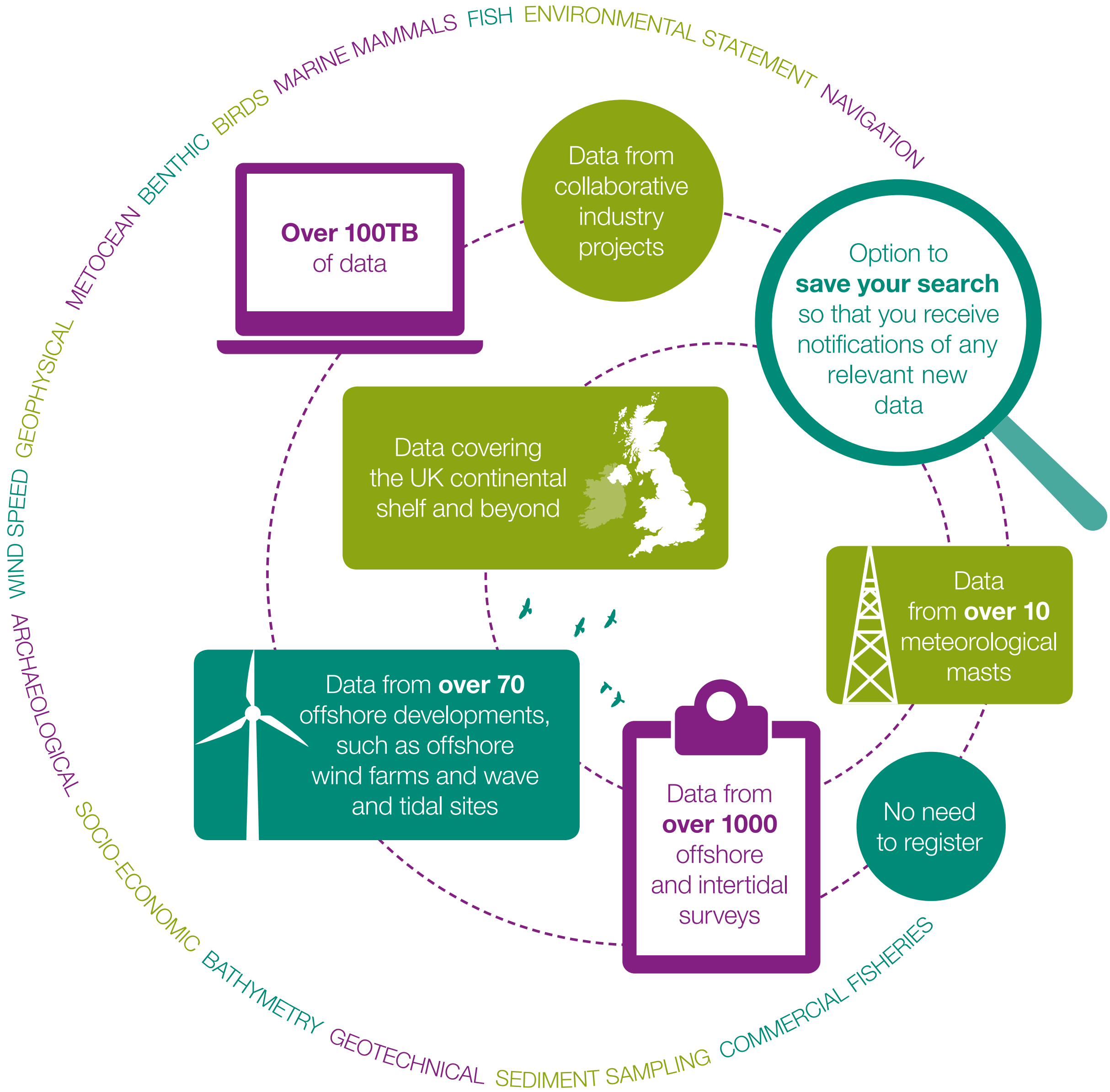
Operational or under construction wind farms

31 windfarms are in operation or under construction

THE CROWN ESTATE

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.
www.marinedataexchange.co.uk



London
The Crown Estate
16 New Burlington Place
London
W1S 2HX

T 020 7851 5000

Edinburgh
The Crown Estate
6 Bell's Brae
Edinburgh
EH4 2BJ

T 0131 260 6070

www.thecrownestate.co.uk/energy-infrastructure
@TheCrownEstate

Correct as of April 2015. Cover image courtesy of Siemens (top).