

The Offshore Wind Evidence and Change Programme

Annual Report 2023

Driving Nature Positive
Offshore Wind Development



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Joint Ministerial Foreword

The UK is a world-leading offshore wind hub, home to the first, second, third, fourth and fifth largest offshore windfarms in the world. Whilst we already have the highest deployment of offshore wind in Europe, we must continue to work hard to reach net zero by 2050 and further bolster the UK's energy independence, whilst protecting and enhancing our cherished natural environment.

We're privileged in the UK to be surrounded by some of the most beautiful and diverse coastal and marine habitats on Earth. Protecting and restoring those habitats can provide wide-ranging benefits, including preventing biodiversity loss, supporting livelihoods and wellbeing, and regulating our climate. This must be central to the delivery of our net zero targets.

As we look to meet our ambition of 50 gigawatts of offshore wind by 2030 while delivering on goals of the 25 Year Environmental Plan to enhance the health and biodiversity of our seas - our colleagues across DESNZ and Defra increasingly look for new and innovative ways to coordinate our approach in this complex space.

Robust data and evidence will therefore continue to play a crucial role in our net zero, nature-positive future. It ensures that as we continue to deliver cheap, abundant, and reliable energy, we can support both a thriving economy and environment.

This is why both Defra and DESNZ are proud partners of OWEC which plays a fundamental role in plugging evidence and knowledge gaps that exist across the industry, supporting us to deliver on our net zero pledges and drive nature positive offshore wind development.

Through a coordinated approach to seabed leasing and the delivery of transmission infrastructure, we will realise the UK's clean energy potential, while considering other seabed users and the natural environment. OWEC's work and its members are key to delivery of the Marine Spatial Prioritisation (MSPri) programme, the Marine Route Map and the Strategic Spatial Energy Plan (SSEP). In collaboration with OWEC, we are taking the steps needed to support co-existence between all sea users, whilst protecting the marine environment.

We are privileged to partner on this programme with our colleagues at The Crown Estate, with vital input and guidance from our Programme Steering Group. OWEC continues to play a fundamental role in providing a platform for collaboration between industry experts and we thank the many individuals who continue to commit time to this shared endeavour. We look forward to seeing the ongoing impact from the OWEC programme throughout 2024.



The Rt Hon Lord Benyon

Minister for Climate, Environment and Energy, Department for Environment, Food and Rural Affairs and Foreign, Commonwealth and Development Office



Minister Andrew Bowie

Minister for Nuclear and Renewables, Department for Energy Security and Net Zero

Foreword

We're privileged to have responsibility for some of the nation's most diverse, distinct and important holdings on land and at sea. We believe that by unlocking this potential and bringing organisations together, we can play a key role in addressing some of society's most challenging issues. We are focussed on leading the energy transition and improving the UK's energy security; taking a leading role in stewarding the protection and restoration of nature; and supporting inclusive communities and driving economic growth and productivity.

As managers of the seabed and much of the coastline around England, Wales and Northern Ireland, we have helped galvanise offshore wind in the UK to create a world-leading offshore wind market. As we look ahead, our ambition is to become the most attractive and sustainable marine economy in the world, with nature at the very core. Our seabed has a critical part to play in the UK's net zero and energy secure future, but it is also under mounting pressure. It is an increasingly busy place, already supporting an extraordinary number of livelihoods, industries and natural habitats as well as holding the key to a greener future and the new jobs and skills that will be created.

We know that we need to do more and move faster if we are going to rise to these challenges and the opportunities they present. We must accelerate the roll out of offshore and renewable technologies, but also do this in a way that works with the many different users of the seabed and - crucially - we need to be reducing the pressure on nature and proactively restoring the marine environment. To help us achieve our goals, we're drawing on all available knowledge, expertise and skills and investing in world-class evidence, research and data to help paint an ever fuller picture of the whole of seabed and its many interdependencies.

By combining this insight with our pioneering work to digitally map the seabed, we are enabling Government and industry to make more informed choices to help de-risk and accelerate the delivery of clean offshore technologies. We are using this to create a Routemap with our partners for the future of our seabed - for nature, for energy and industries and to boost communities across the country. This in turn is supporting the UK's position as one of the most attractive places to invest in offshore renewables and create more jobs. All the while enabling more sustainable choices for the long-term health of the marine environment.

Our £50 million investment in the Offshore Wind Evidence and Change (OWEC) programme is an important part of growing the data and evidence base and a shining example of how we can achieve more when we work in partnership, each bringing our unique strengths to address shared challenges.

Finally, let me conclude by saying how incredibly grateful I am to all the members of our Programme Steering Group for their continued support for the OWEC mission to drive change. Together, we will harness the research findings from OWEC projects, using this data and evidence to help shape the future of offshore wind and the marine environment. I look forward to continuing to work hand in hand with all of you over the next year as we aim to create the most attractive and sustainable marine economy in the world and support the protection and restoration of nature.



Gus Jaspert

Managing Director, Marine
The Crown Estate

Charting our Course: A Year of Collaboration and Transformative Progress in Offshore Wind

As we delve into the pages of this year's annual report for the OWEC programme, I reflect with great enthusiasm on the journey we've taken and the significant progress we've made with 35 projects now underway all over the country.

Working alongside our dedicated team, I take pride in being part of a programme that truly embodies The Crown Estate's ambition to catalyse the UK towards a net zero and energy secure future and deliver a green and thriving marine environment. This achievement is the result of collaboration with a diverse range of expert partners, government departments and devolved governments from across all four nations – all of whom bring an incredible amount of knowledge and expertise to the table.

Over the past year there have been numerous highlights that underscore our commitment to create more opportunity for co-existence, support the consenting process, protect wildlife, accelerate the development of offshore wind, and drive the recovery of the marine environment. I wanted to draw particular attention to the launch of four significant research projects now underway, led by the Offshore Wind Industry Council (OWIC), the Carbon Trust, the Joint Nature Conservation Committee (JNCC), and Natural England, to fill critical evidence gaps around how seabirds interact with offshore windfarms and how strategic compensation measures could support seabird colonies, habitat restoration and creation.

At its heart, robust and accessible data will help speed up the consenting process by reducing uncertainties, encouraging innovative design measures to enhance biodiversity, and providing a better understanding of the spatial needs of user groups. This year, to name but a few examples, that will involve gaining a deeper insight into designing sub-sea cabling to promote the colonisation of marine wildlife; improving the evidence base for the coexistence of offshore windfarms and commercial fishing; and studying the little-known environmental impacts of floating offshore wind which is still very much a novel technology.

Throughout this report, you can explore the range of our work through OWEC, the impacts realised, and the collaborative spirit that fuels the programme. Together, we are shaping and delivering research projects across the UK to generate better insights and understanding that can support the long-term future of the marine environment and deliver better outcomes for all.



Mandy King

Offshore Wind Evidence and Change Programme Lead
The Crown Estate

OWEC in numbers

Since OWEC was launched



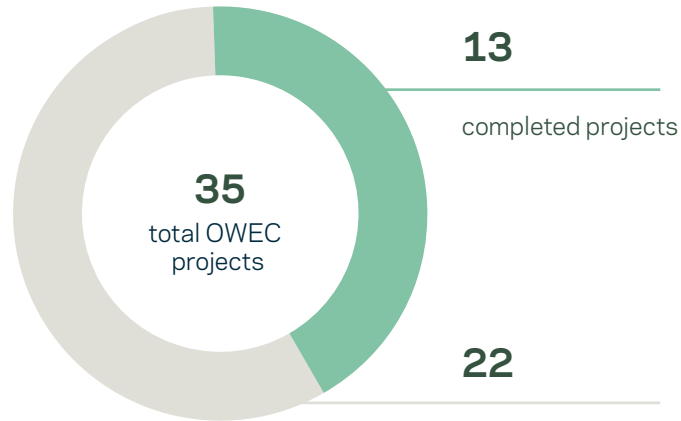
£50 million

investment from
The Crown Estate



£12 million +

partner contributions



3000+

OWEC project reports
downloaded since
OWEC was launched



OWEC in 2023



5

project applications
received in September
2023 project call



13

total projects funded



6

projects completed
in 2023



50+

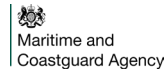
attendees at 2023
PSG meetings, including
senior policy and
industry representatives

370+

OWEC project reports
downloaded in 2023

Programme Steering Group

The Programme Steering Group is made up of the following organisations



Programme Steering Group – the power of partnership

The Crown Estate aims to make the most of its position between the public and private sectors to bring partners together and build strong collaborative relationships to develop progressive and innovative solutions to solve our shared challenges. Recognising that none of us hold all the answers individually, working together openly and in partnership is crucial for answering the big questions we all face.

The Offshore Wind Evidence and Change Programme is one of the best examples of this partnership-led approach in practice and continues to thrive thanks to the sustained efforts of its members - a coalition of 26 members including government organisations from all four nations, industry bodies, and environmental NGOs.

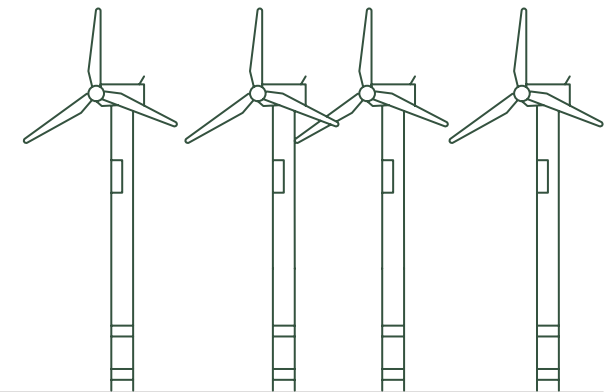
A selection of Programme Steering Group members reflect on the past year, and the continued importance of the programme in helping meet their goals.

"Many of the UK's globally important seabird populations were already in decline due to human pressures before the arrival of Highly Pathogenic Avian Influenza (HPAI) in 2021. Since then, tens of thousands of seabirds have died from this virus. Last year, through the support of OWEC and other funders, the RSPB and partners surveyed 14 seabird species to understand the population level impact of the outbreak. The OWEC programme is key to creating a shared evidence base to understand our fragile marine wildlife and ecosystems, and the impact of increasing offshore wind development in that environment. It is also forging a constructive dialogue between different interests to find ways to avoid damage and identify opportunities for restoration."

Katie-jo Luxton
Global Conservation Director,
Royal Society for the Protection of Birds (RSPB)

"Natural England is delighted to lead two game-changing projects, POSEIDON and ReSCUE, within the OWEC programme. We believe the programme will help realise our strategic aim for thriving marine and coastal nature alongside low impact offshore wind energy, and we are extremely grateful for the financial support provided. The programme is a fantastic showcase for collaborative working on wide-ranging scientific challenges, and will greatly enhance evidence-led decision-making for offshore wind consenting."

Tim Hill
Chief Scientist, Natural England



Creating impact

In just three years since its inception and driven by the programme mission to drive change, OWEC is already making a substantial impact. The programme structure provides a collaborative platform for organisations with an important role to play in future offshore wind deployment, an effective planning system and the evolution of relevant policy and decision-making.

Through its strategically selected research and evidence-driven initiatives, the programme is filling critical knowledge gaps that will ultimately help speed up the consenting process by reducing uncertainties. It is providing a data and evidence base that will shape the trajectory of the offshore wind industry and accelerate the delivery of offshore wind in a way that's aligned with nature.

The programme has already played a role in influencing policy decisions, providing valuable insights that contribute to more informed and effective regulations. For example, recommendations made by the Strategic Targets for Net Gain project were used to inform Defra's ongoing work through the Offshore Wind Enabling Actions (OWEAP) Programme to develop policy for Marine Net Gain (MNG), an approach to development that aims to leave the marine environment in a measurably better state than before. Similarly, recommendations from the East Coast Grid Spatial Study informed the policy review undertaken by DESNZ and the Office of Gas and Electricity Markets (Ofgem) into how grid connections for offshore wind farms are delivered.

Highlights from the past year include:

July 2023

New research released advancing understanding of interactions between subsea power cables and the marine environment, providing further evidence to facilitate and accelerate decisions in the planning and consenting of offshore wind development.

November 2023

The ECOWind programme and OWEC held its first Annual Impact Meeting welcoming policy experts, scientists, academics, and industry stakeholders to discuss work underway to understand how offshore wind affects ecosystems around the UK and identify key impact actions for the next 12 months. These actions will be revisited annually to review progress and re-assess gaps and emerging priorities.

September 2023

Report published providing the first of its kind investigation and mapping of marine restoration potential in English waters. This will provide evidence needed to set out where MNG activities could occur and what their benefits may be, supporting Natural England and Defra's on-going work in this area.

January 2024

The launch of the Offshore Wind Evidence and Knowledge Hub (OWEKH). This digital knowledge hub is set to accelerate the consenting process by streamlining Environmental Impact Assessments and provide a collaborative space where experts from across industry and academia can join forces to shape the future of offshore wind across the UK.

Driving nature-positive offshore wind development

Understanding how crucial nature is for our lives and the environment, we know it's important to speed up offshore wind development in a way that benefits nature. Nature helps us live well, and it can also lessen the impact of climate change. We understand that conserving nature and ecosystems is a complex process. But we need to act now, where we can.

As demands on the seabed increase, it's important we develop ways to maintain the rich biodiversity of our seas, safeguard nature, reduce environmental risks and support coastal communities, making sure that we foster the sustainable growth of the marine sector. At the same time, we need to take a balanced, long-term view to tackling systemic issues that are barriers to addressing the decline in the natural environment. To do this, The Crown Estate is focusing on developing and maintaining strong partnerships, investing in innovation, and using data and evidence to make informed decisions across the entirety of its business.

The past year has seen the launch of a considerable number of projects aimed at ensuring that offshore wind development can be accelerated, helping to achieve the UK's net zero ambitions, while also supporting, protecting and restoring marine biodiversity. The new initiatives focus on conducting new research, discovering and analysing data, and filling knowledge gaps to enhance our understanding of how ecosystems can be affected by offshore wind developments and how we can best avoid, mitigate or compensate for the impact. In this section you will find a few examples of these vital projects from across the year.



Offshore Wind Evidence and Knowledge Hub (OWEKH)

Lead organisations	The Crown Estate, Institute of Environmental Assessment and Management (IEMA)
Project partners	Department for Environment, Food & Rural Affairs (Defra), Offshore Wind Industry Council Pathways to Growth (OWIC P2G)
Delivery partner	AtkinsRéalis
Kick off date	June 2022

Project Summary

The Offshore Wind Evidence and Knowledge Hub (OWEKH) is a platform designed to improve information sharing in the offshore wind sector. It aims to simplify the approval process for new offshore wind farm projects, ensuring the protection and recovery of marine ecosystems.

When proposing a new offshore wind project, there's a requirement to conduct an Environmental Impact Assessment, considering all potential impacts on the environment and society. This process is often complex and time-consuming, generating a lot of data that isn't consistently stored for future use and causing delays in future projects.

OWEKH addresses this issue by providing open access to data, peer-reviewed evidence, and collaboration opportunities for developers, regulators, and marine specialists in the offshore wind sector. A Community of Practice curates and interprets the data, offering expert insights to streamline the consenting process. The goal is to accelerate the approval process, supporting the UK's net zero ambitions whilst maintaining a healthy marine environment.

After a four-month discovery phase, where insights were gathered from the industry, the OWEKH design team at AtkinsRéalis created the online portal, officially launched in January 2024.

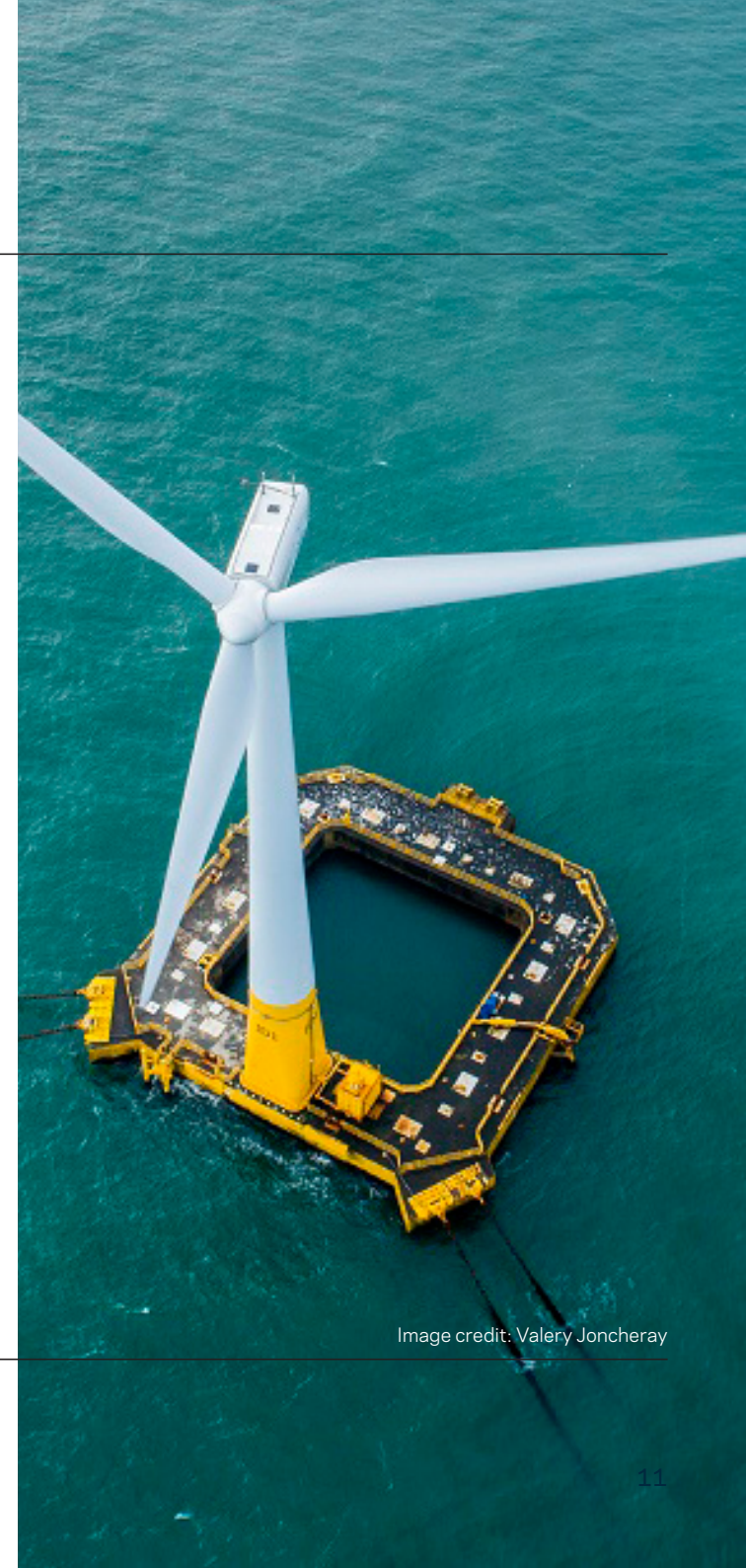


Image credit: Valery Joncheray

Prevalence of Seabird Species and Collision Events in OWF (PrediCtOr)

Lead organisations Carbon Trust under the Offshore Renewables, Joint Industry Programme (ORJIP)

Kick off date November 2023

Project Summary

To support thriving biodiversity near offshore wind projects, it's crucial to minimise the risk of birds colliding with the turbines. This factor is key to gaining consent for offshore wind farms. Currently, the lack of a unified monitoring method and insufficient real-world data results in uncertain predictions of collision risks.

The PrediCtOr project aims to address this by creating a consistent and coordinated approach to reduce uncertainties. The focus is on improving the accuracy of collision risk estimates, ultimately lowering the risk associated with obtaining approval and potentially shortening the consenting process for offshore wind projects.



Procellariiform Behaviour & Demographics (ProcBe)

Lead organisations	Joint Nature Conservation Committee (JNCC)
Project partners	Department for Energy Security and Net Zero (DESNZ), Department for Environment, Food & Rural Affairs (Defra), University of Oxford, Royal Society for the Protection of Birds, University of Gloucestershire
Kick off date	October 2023

Project Summary

Offshore wind farms can affect seabirds in various ways including collisions, displacement from feeding areas and by acting as barriers to movement. There are knowledge gaps regarding how specific seabird species, such as storm petrels and Manx shearwater, interact with offshore wind developments.

The ProcBe project uses data to enhance our understanding of seabird behaviour, distribution, and demographics at sea. By doing so, the project aims to fill crucial knowledge gaps related to how seabirds interact with offshore wind farms. This improved understanding will enhance demographic and population modelling, boosting confidence in impact assessments. Ultimately, it will support the sustainable expansion of offshore wind projects in the Celtic and Irish Seas and the west coast of Scotland.



Reducing Seabird Collisions Using Evidence (ReSCUE)

Lead organisations	Natural England
Project partners	BTO, JNCC, OWIC, Marine Directorate, Defra, RSPB
Kick off date	September 2023

Project Summary

The ReSCUE project aims to lower the chances of seabird collisions with UK offshore wind farms by improving our knowledge of seabird flight heights and collision risks. Strategies include increasing confidence in estimating these heights, gathering new data, and creating user-friendly datasets and tools. The expected result is a reduced risk in consenting future offshore wind projects and valuable insights for effective mitigation efforts. This helps the growth of the offshore wind industry while protecting and aiding the recovery of vulnerable seabird species.



Strategic Compensations Pilots for Offshore Wind

Lead organisations	Offshore Wind Industry Council (OWIC)
Kick off date	October 2023

Project Summary

This project aims to create effective compensation solutions for the environmental impacts of offshore wind projects, especially those that can't be avoided or lessened. It intends to build a comprehensive body of evidence with best practices, research results, and practical pilot projects focusing on four key measures:

- **Artificial nesting for seabirds** - expanding evidence on nesting, including structures onshore or offshore and opportunities to repurpose oil and gas platforms;
- **Habitat restoration and creation** - enhancing and creating habitats to offset environmental impact;
- **Predation reduction** - implementing exclusion zones around protected seabird colonies and biosecurity programmes to boost seabird breeding success;
- **Removal of defunct infrastructure** - addressing the removal of outdated structures to minimise their impact on the marine environment.



Ecological effects of floating offshore wind (ECOFLOW)

Lead organisations	Natural Environment Research Council (NERC)
Kick off date	August 2022

Project Summary

The ECOFLOW research programme focuses on understanding how marine ecosystems will react to the planned large-scale expansion of floating offshore wind (FLOW) in UK waters over the next decade. The goal is to change the way we deploy FLOW on a large scale, ensuring nature recovery and enabling coexistence with other sea users, especially fisheries.

This programme will provide robust evidence, new methods, and tools to meet the essential information needs of the government and industry. These resources are crucial for shaping policies and decisions. Additionally, the programme will introduce innovative underwater sampling methods for comprehensive marine observation, contributing to a better understanding of how to manage FLOW sustainably.

Image credit: Paul Pettitt/UPY 2022

Benthic-Offshore Wind Interactions Evaluation (BOWIE)

Lead organisations	University of Southampton
Project partners	Van Oord, Vattenfall, Natural England
Kick off date	April 2023

Project Summary

The [BOWIE project](#) aims to study how offshore wind development affects seabed life and fish, considering other factors like trawling and climate change. Using environmental and social research, BOWIE will fill important knowledge gaps and support sustainable decision-making. Autonomous underwater vehicles and machine learning will analyse seabed habitats, and collaboration with stakeholders will address uncertainty about how marine ecosystems respond to offshore wind expansion.

The project's findings will contribute to Defra's Offshore Wind Environmental Improvement Package (OWEIP), a key part of the British Energy Security Strategy (BESS), helping to overcome issues in the decision-making process for consenting offshore wind projects.



Image credit: Keith Hiscock

Planning Offshore Wind Strategic Environmental Impact Decisions (POSEIDON)

Lead organisations	Natural England
Project partners	Cefas, JNCC, the Marine Management Organisation, Natural Resources Wales, NatureScot, Bangor University and OWIC
Kick off date	January 2022

Project Summary

The POSEIDON (Planning Offshore Wind Strategic Environmental Impact Decisions) project aims to enhance understanding of environmental risks in UK waters and provide new mapping tools to support low-impact offshore wind expansion. The research will offer valuable information for developers, advisors, and decision-makers to plan and approve new wind farms. It also establishes a comprehensive environmental baseline, optimising existing knowledge and guiding future surveys more effectively.

The project has processed over 700,000 km of bird and mammal survey effort, collected additional seabed data, and is planning the design of mapping and modelling tools which will be a key outcome of the research. The final tools are expected to launch in September 2025 and will assist marine managers, scientists, and developers in considering environmental factors from the beginning of marine planning and project development.



Predators and Prey Around Renewable Energy Developments (PrePARED)

Lead organisations	Scottish Government Marine Directorate
Project partners	University of Aberdeen, University of Exeter, SMRU, SMRU Consulting, Aarhus University, BioSS, UKCEH, NatureScot, Natural England and Crown Estate Scotland.
Kick off date	January 2022

Project Summary

The PrePARED project is addressing uncertainties about how offshore wind farms affect protected species, aiming to speed up the planning and deployment of offshore wind to meet the UK's net zero targets. By enhancing our understanding of how seabirds, marine mammals, and fish behave around these wind farms, the project aims to boost stakeholder confidence in sustainable offshore wind delivery. This involves providing clearer guidance on assessing cumulative impacts, reducing the risk of delays in planning and licensing.

The project's focus on Scotland, particularly the Moray Firth, and Firths of Forth and Tay regions, is expected to have broad relevance for the entire UK. The improved understanding gained will inform marine spatial planning and guide future offshore wind development.



Highly Pathogenic Avian Influenza (HPAI) Surveys

Lead organisations	RSPB
Project partners	RSPB Avian Flu Appeal, ScotWind developers of the East and North East Plan areas, BTO, NatureScot, Natural Resources Wales, Natural England, JNCC, National Trust for Scotland, National Trust, Sea Mammal Research Unit, Sarah Wanless, Mike Harris, and The Seabird Group.
Kick off date	May 2023

Project Summary

Due to the significant seabird mortality caused by Highly Pathogenic Avian Influenza (HPAI), the RSPB is leading a UK-wide programme to assess the immediate impacts on seabird breeding populations. This involved counting priority species at specific sites in 2023. After extensive planning the program conducted fieldwork during the summer, collecting data across hundreds of sites focusing on species like Great Skua, Arctic Skua, Gannet, Guillemot, Kittiwake, large gulls, and terns.

The gathered data, combined with counts from other organisations and volunteers, aims to provide comprehensive geographic coverage for key species affected by HPAI. This knowledge may result in changes to the Conservation Status of some species, which could influence nature conservation actions, and it will produce updated population counts for use when assessing the impacts of offshore windfarm developments.



Nature Inclusive Cable Enhancement (NICE) Protection project

Lead organisations	Cefas
Project partners	ARC Marine Ltd, DEME Group
Kick off date	September 2022

Project Summary

The NICE Protection (Nature Inclusive Cable Enhancement and innovative Nature Inclusive Design) project is focused on promoting the coexistence of marine life on offshore wind cabling materials, supporting wildlife and leaving the natural environment in a measurably better state than it was beforehand. The research aims to gather evidence on the potential ecological impacts of Nature Inclusive Design (NID) technologies for cable protection compared to standard cable protection technologies, with a key focus on seabed life such as corals, mussels and barnacles.

In Phase 1, the project published a literature review in October 2023 summarising existing findings and identifying key evidence gaps. Moving into Phase 2, the project will collect data by deploying both standard and NID types of subsea cable protection at a UK study site.



Image credit: Dan Bolt/UPY 2023

The year ahead

In 2024 the offshore wind industry will continue to step up efforts to accelerate deployment, supporting the UK government's target to increase offshore wind to 50GW and deploy up to 5GW of floating offshore wind by 2030, and the consenting basis for the sector contribution to net zero beyond this. But this can only be achieved by ensuring we have the right data and evidence base to support decision making at all levels.

We look forward to continuing to build on our 20+ year track record of investing in data and evidence to support the sustainable development of the seabed and eagerly anticipate the completion of further OWEC projects later this year. The research produced through OWEC will be used directly by teams here at The Crown Estate to build our understanding of the impact of offshore wind on the natural environment, which alongside our approach to leasing, will help to improve and accelerate decision-making and catalyse the growth of the offshore wind market in the UK. We will also ensure the research is easily accessible to all relevant parties via the Marine Data Exchange - a world leading, first of its kind resource of marine industry survey data, research, and evidence - so that offshore wind development can be delivered in balance with goals to restore marine environments that are already under pressure - creating opportunities for marine recovery and greater biodiversity in the process.

As well as prioritising the collection and sharing of environmental and industry data, we will use our spatial mapping expertise, cross-sector overview of seabed demands, new digital capabilities and inputs from our trusted partners to inform how we can balance competing seaspace priorities and unlock the seabed's potential to support vital industries, net zero and nature recovery for the long-term. This will underpin the 2050 Marine Delivery Routemap being developed by The Crown Estate in partnership with government bodies, delivery agencies and in coordination with international neighbours, to co-ordinate future activities in the offshore environment across sectors out to 2050. The Routemap will inform where enabling investments may be needed to support sustainable growth including ports, grid and local supply chain development.

As the year progresses, we will continue to work in partnership with OWEC's Programme Steering Group, concluding the 2023 main call for projects, with the view of commencing them in autumn of 2024. We are also undertaking a mid-term impact assessment across projects. Finally, three scheduled Programme Steering Group meetings will further enhance collaboration and engagement with our dedicated members.

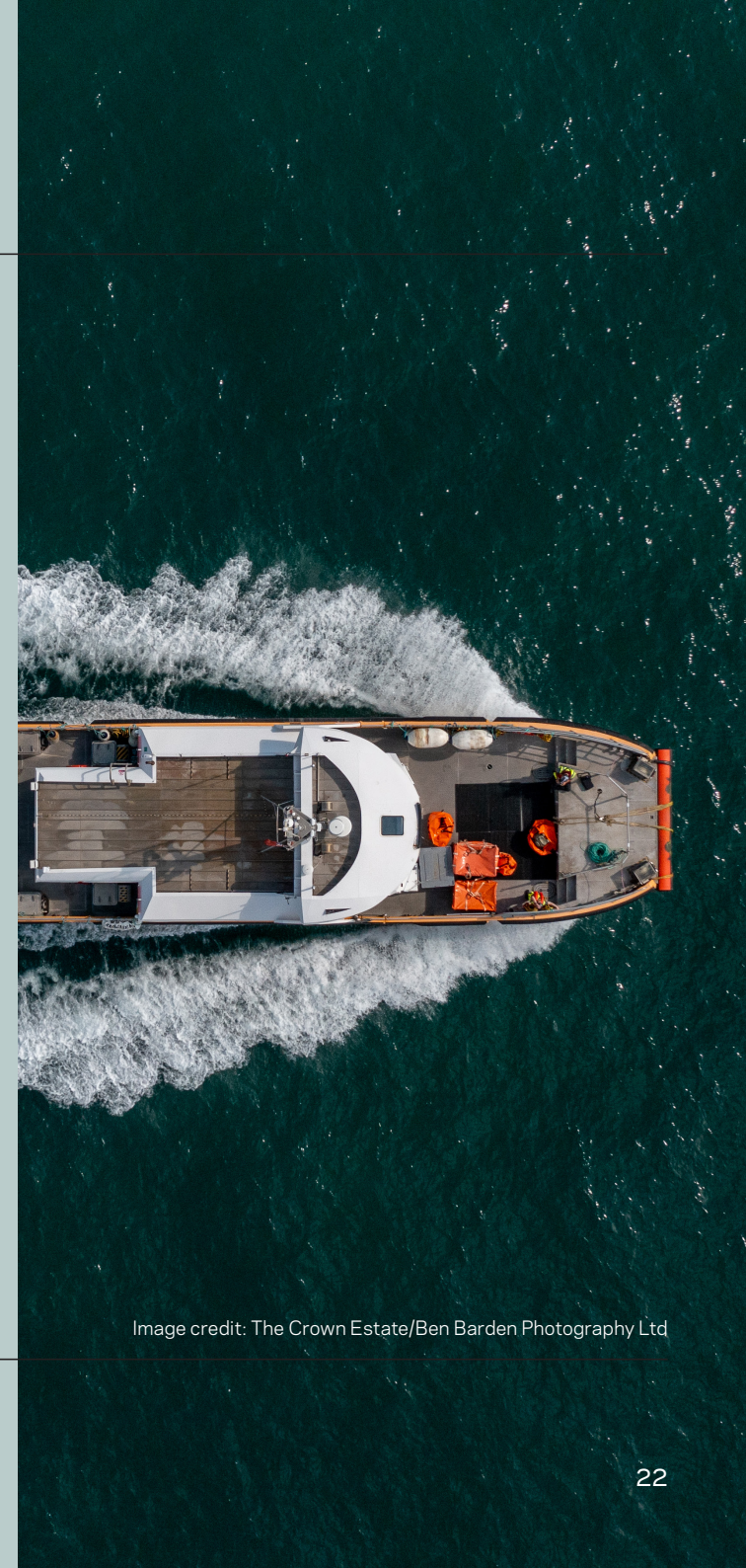


Image credit: The Crown Estate/Ben Barden Photography Ltd

Find out more

Please explore the programme website at:
www.thecrownestate.co.uk/owec

Feedback is important to us. If you have any comments or enquiries, please email:
OWECenquiries@thecrownestate.co.uk

Findings of completed projects can be found on The Crown Estate's Marine Data Exchange at:
www.marinedataexchange.co.uk/content/info/offshore-wind-evidence-and-change-programme

