

## **EMI Stakeholder Research 2019/2020**

\*\*The research in this report was conducted prior to the Covid-19 outbreak. As a result there are no mentions or references to this during the report.

Populus interviewed 41 stakeholders across a variety of groups between 21st November 2019 and 30th March 2020 in relation to The Crown Estate's performance in terms of its interactions and operations, focusing on the Energy, Minerals, and Infrastructure portfolio (EMI), and the Offshore Wind Leasing Round 4.

Interviews lasted between 20 and 30 minutes, and covered 6 stakeholder groups: Primary Stakeholders, Local Authorities, Government and Regulators, Statutory Bodies, Scottish Contacts\*, and Political Stakeholders. The stakeholder list was tailored to focus on those involved in action relating to wind, energy, and Round 4. The report is primarily qualitative-focused, with some additional quantitative tracking questions.

Overall, The Crown Estate has a broadly positive reputation with stakeholders in the marine environment, please see executive summary below:

- They welcomed The Crown Estate's professional approach and willingness to communicate
- Improvements in Round 4 compared with previous rounds are also key to stakeholder's positive perceptions
- Stakeholders' understanding of what The Crown Estate does tended to be limited to the marine environment and there is no real sense of its broader work and portfolio
- There is acceptance that delivering value to the Treasury is important and that The Crown Estate performs well on this, however there is a sense that it can be overly commercially focussed and insufficiently focussed on environmental concerns
- Stakeholders wished for a greater balance of these two priorities
- The Crown Estate is seen as effective in its communication and engagement with stakeholders
- It is regarded as approachable and willing to listen; some described The Crown Estate as collaborative
- However, there was comment that it could be more open/detailed in what it communicates (it can be an 'arms length' organisation)
- And smaller organisations feel less heard
- Net Zero is regarded as a critical opportunity for the UK and as the 'landlord of the seabed' The Crown Estate has a key role to play in realising this opportunity
- It needs to do so by listening to all stakeholders, including special interest groups, working to manage and resolve conflicts in the marine environment, and balancing the commercial focus of the organisation with the potential environmental benefits.