JWPA Wind Vision 2023
—Contribution of wind power toward the realization of a safe, stable and sustainable society—

May 2023
Japan Wind Power Association
https://jwpa.jp
In response to Russia’s invasion of Ukraine, the international community has accelerated the introduction of renewable energy from the perspective of "energy and economic security" in addition to "decarbonization."

In response to changes in the international situation, Japan’s energy policy direction has also shifted to the realization of "Climate Change Countermeasures," "Energy and Economic Security," and "Green Transformation (GX)."

Japan should aim for a "safe, stable and sustainable society" by promoting "transition to a decarbonized society", "enhancement of industry and energy resilience", and "internationally competitive industry creation and economic growth ." Wind power is positioned as the most important power source that contributes to the realization of our ideal society.

The future society that Japan should aim for and Contribution of Wind Power

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<th>Direction of industrial and energy policy</th>
<th>Related policies</th>
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<td>Climate change countermeasures</td>
<td>2050 Carbon Neutral Declaration</td>
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<td>Global Warming Countermeasure Plan</td>
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<th>Vision for Future Society and Contribution of Wind Power</th>
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Realization of a safe, stable and sustainable society
Setting ambitious and clear medium- to long-term targets is the most important and indispensable measure for increasing the predictability of the market, attracting private sector investment, and fostering domestic industries with international competitiveness.

JWPA proposes to set the target of 1/3 electricity supply by wind power in 2050, for which 140GW wind power should be installed (onshore wind 40GW, fixed offshore wind 40GW, floating offshore wind 60GW). Also, we propose to aim even higher installation to expand domestic green hydrogen supply.

140 GW wind power will achieve economic ripple effect of 6 trillion yen, job creation of 355K people and procurement cost reduction of fossil fuel of 2.5 trillion yen as of 2050.
Necessary measures for realizing the future society and maximizing the introduction of wind power

- Public and private sector should work together to rapidly deploy comprehensive and necessary measures to realize a safe, stable, and sustainable society and maximize the introduction of wind power, which consists of transitioning to a decarbonized society, strengthening industrial and energy resilience, creating internationally competitive industries, and achieving economic growth.

Basic policy and overall picture of necessary measures to realize the future society

**Basic policy**

- Large-scale, stable, and highly predictable medium- to long-term market formation
- Rational and highly transparent system design consistent with the global market
- Timely and accurate industrial policy to realize competitive domestic industry development

**Necessary measures to be implemented**

1. Setting ambitious and clear medium- to long-term targets
2. Formulation of a process chart (grand design) for achieving goals
3. Strategic industrial development support measures that draw an effective path

4. Maximum introduction of offshore wind
   - 4.1 Formation of a solid project pipeline
   - 4.2 Early commercialization and development of floating offshore wind
   - 4.3 Expansion of sea area utilization to EEZ
   - 4.4 Early realization of a highly effective central system
   - 4.5 Planned development and acceleration of base ports

5. Maximum deployment of onshore wind
   - 5.1 Resolving location restrictions and shortening lead time
   - 5.2 Promoting long-term stable and community symbiotic replacement

6. Formation and operation of next-generation grid networks
7. Achieving economic independence and risk reduction
8. Securing, educating and training necessary human resources

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Importance of a grand design and measures to foster domestic industries with international competitiveness

- In order to achieve the introduction target, it is essential for the public and private sectors to formulate and share a process chart (grand design) that clearly indicates the critical path for implementing multifaceted and cross-ministerial measures in a comprehensive and consistent manner, and to proceed effectively while confirming and verifying the progress of these measures.

- In particular, in order to foster domestic industries that are internationally competitive, it is necessary for the entire nation to take effective and strategic measures to support the development of industries, considering the steps required for such development.

Roadmap for Developing Domestic Industry with International Competitiveness

<table>
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<tr>
<th>phase</th>
<th>- 2025</th>
<th>- 2030</th>
<th>- 2040</th>
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<td>Investment decisions based on milestones in development plans and support measures</td>
<td>Formation of new supply chains in fields where domestic formation is rational (Balancing industrial/energy resilience and cost)</td>
<td>Independence as a cost-competitive global player / Sustainable growth including overseas expansion</td>
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<td></td>
<td>Role of the government</td>
<td>Role of industry</td>
<td>Role of industry</td>
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<td></td>
<td>Maximum use of existing supply chains in cost-effective way</td>
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Toward the realization of a safe, stable and sustainable society and the expansion of wind power

- JWPA formulated **a new mission, vision and values in May 2021**, in order to adapt to the ever-changing environment and times, and to contribute to the realization of a sustainable society as a main power source.
- It is extremely important for both the public and private sectors to **openly discuss the introduction targets and necessary measures proposed in this Wind Vision**, and for each party to **fulfill its responsibilities** to the maximum extent possible. JWPA will play a leadership role as initatively.

**Mission**
- Through the growth and expansion of wind power, we aim to deliver **a safe and stable life to people and realize a sustainable society**.

**Vision**
- To realize a decarbonized society, we will **bring together the knowledge, experience, and consensus of various fields** to lead the maximum introduction and operation of wind power.
- The aim is to make wind power an economically independent main power source and **to build an internationally competitive wind power industry**.

**Value**
- We will responsibly implement measures and policies necessary for the utilization of wind energy from **a long-term and national perspective**, without being biased toward the short-term interests of individual companies or industries.