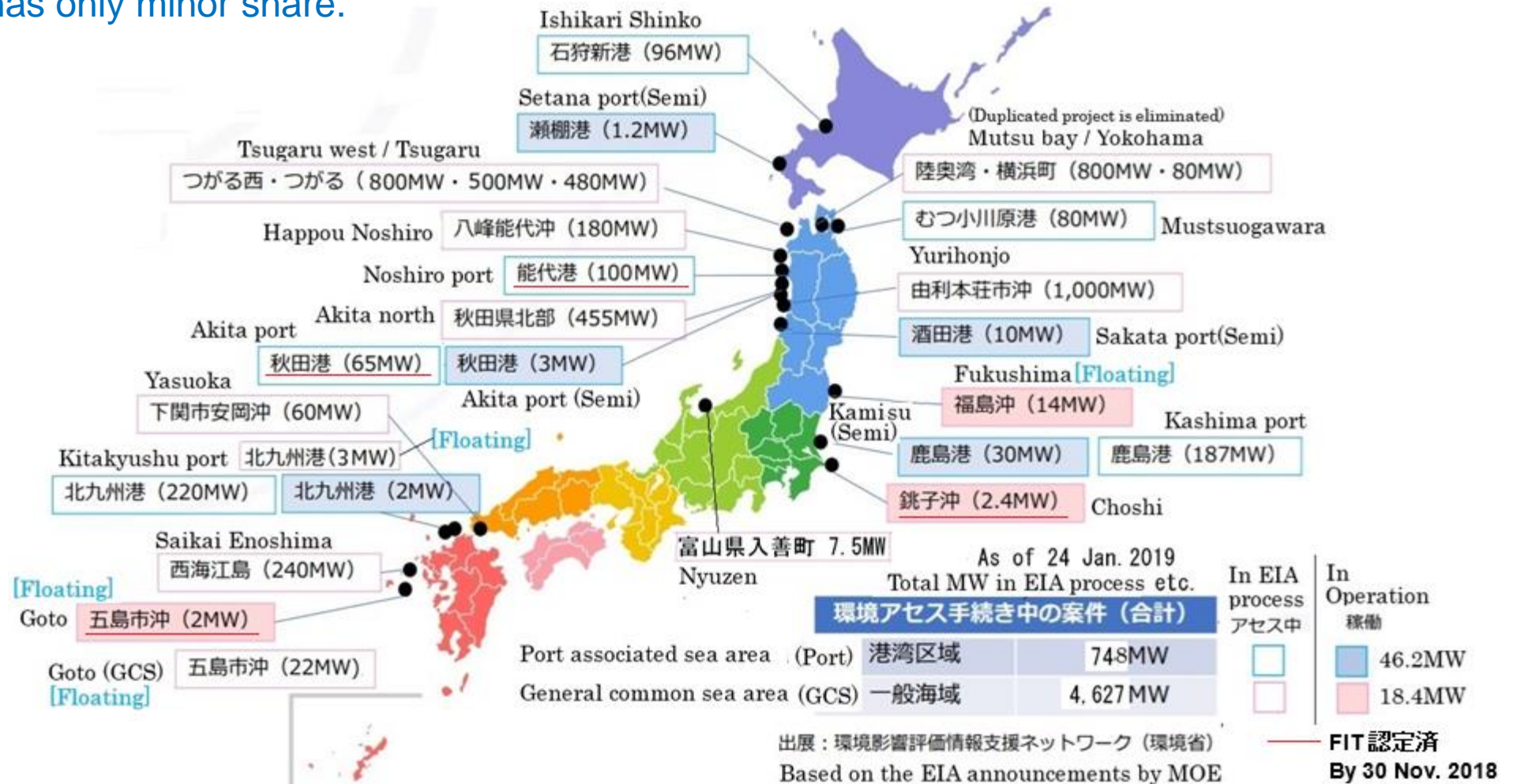


Current Offshore Wind Power Projects in Japan (Both fixed and floating type)

- Japan has 91GW of offshore wind power potential for bottom fixed type.
- JWPA propose 10GW of offshore wind power by 2030. It is about 11% of its potential.
- More than 5GW of projects are in the pipeline now.
- Floating type has only minor share.



Laws and Tariff at Offshore Wind Power in Japan



Japan sea area is divided into several categories by Japanese law system.

Sea Area Categories		Law	Occupation year	Tariff	
				FY2019	FY2020
Territorial Sea (Within 22.4 km)	Port Associated Sea Area	Harbor & Port Law (Amended in 2016)	10 years (repeatable)	FIT 36 JPY/kWh	FIT 36 JPY/kWh
	General Common Sea Area (Much broader than PASA)	Each prefectural / special city's regulations	Such as 3 – 4 years (repeatable)	FIT 36 JPY/kWh	No data
		New offshore law (Enforced in April 2019)	30 years	Auction	
Exclusive Economic Zone (EEZ)		No regulations	No data	No data	No data

Researched by JWPA

Note:

- Unfortunately, high tariff 36JPY/kWh is so-called “A cake in the picture”.
- Development process in Japan needs very long time for getting EIA permission (4-5 years). All new wind farms more than 7.5MW needs legalized EIA permission in Japan since Oct.2012. You have to have entered into Scoping stage of EIA process & to secure grid connection, before getting FIT approval.
- Therefore, only few quick mover can “eat the cake (enjoy 36JPY/kWh tariff)”. Most of developers shall be forced to join the auction.