

A solid orange horizontal bar is located at the top left of the slide.

洋上風力サプライチェーン
形成の海外最前線

The Frontline in Establishing the Offshore Wind Supply Chain in the Global Market

猪狩 元嗣

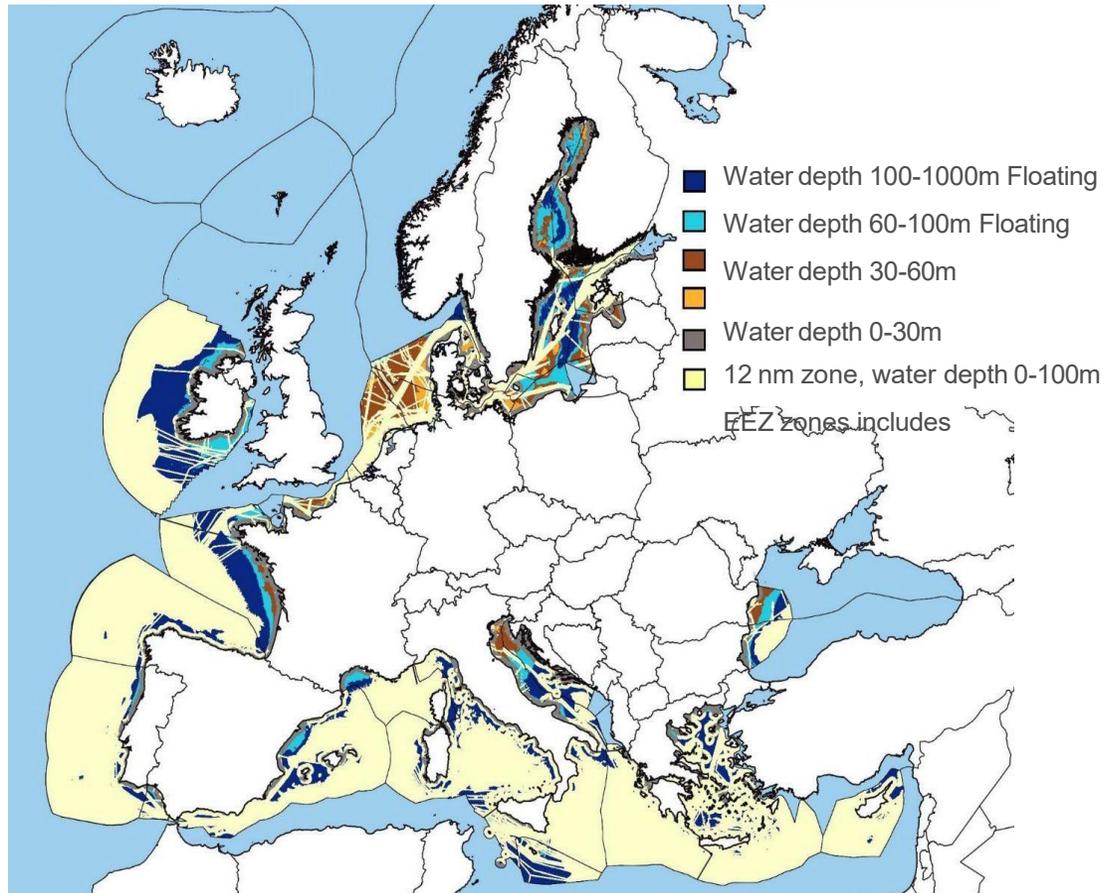
Mototsugu IKARI

2026年2月24日

24th February 2026

EU: 洋上風力発電の本義 / Purpose of Offshore wind

潜在エネルギー / Energy Potential

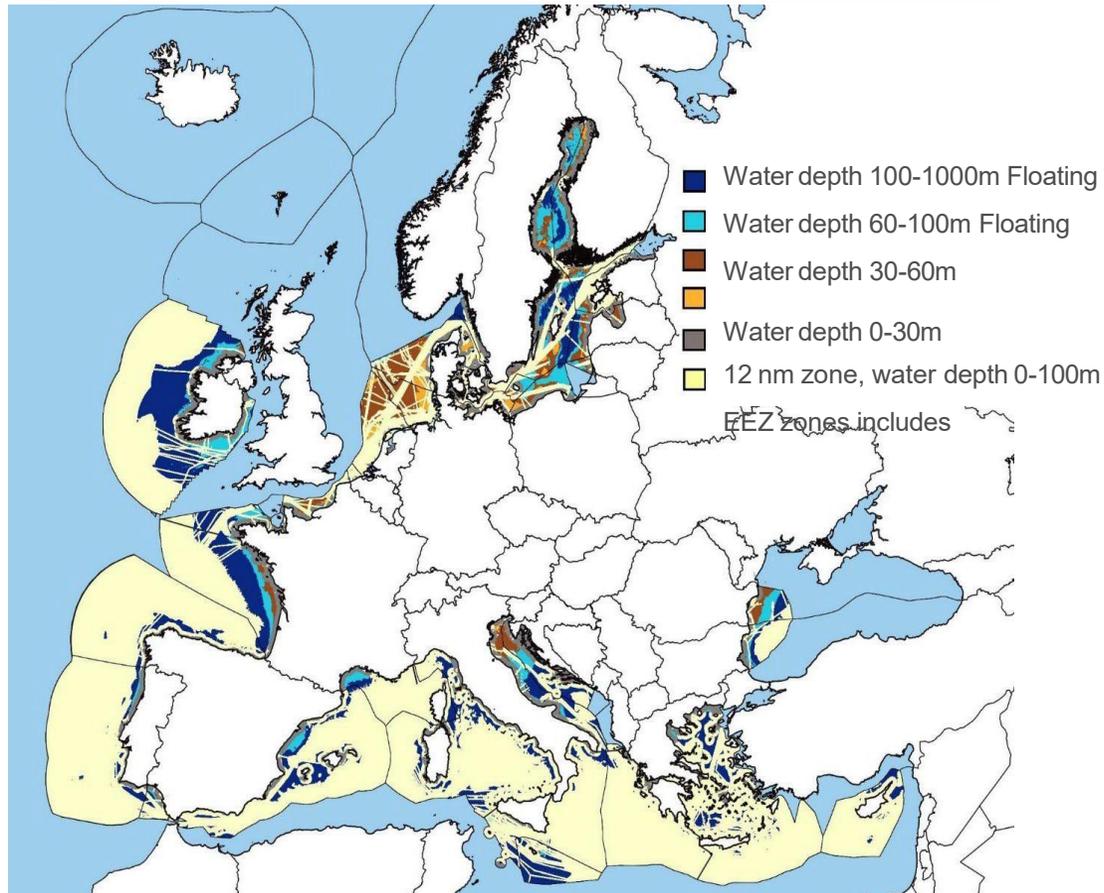


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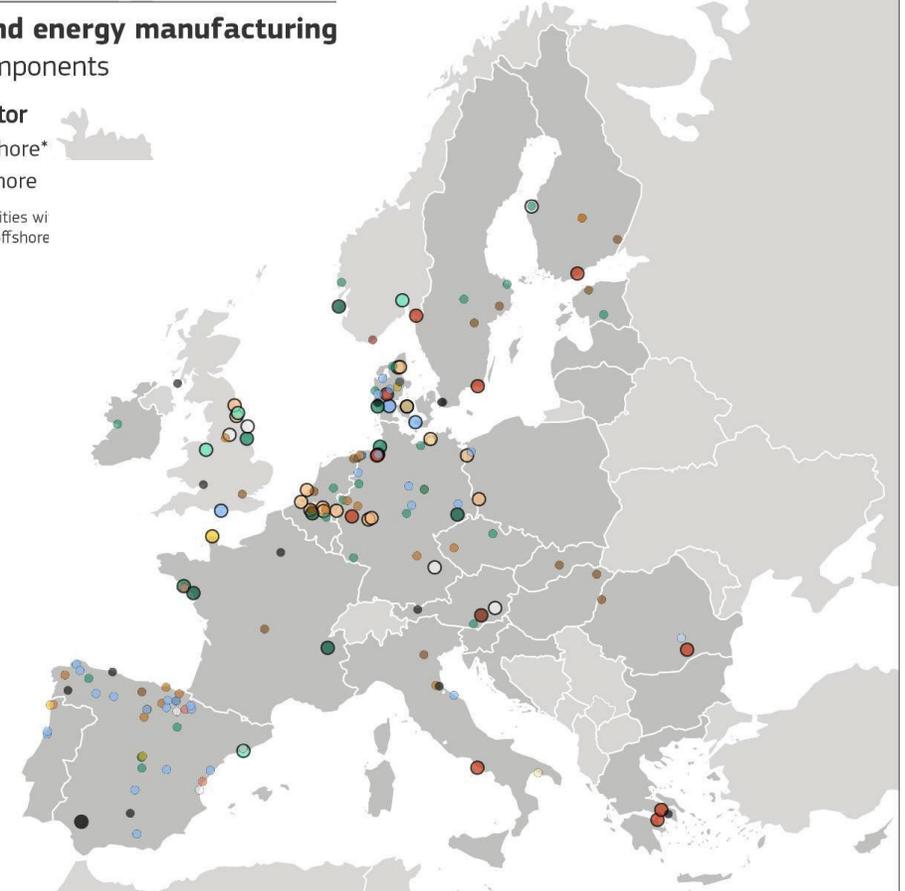
潜在産業力 / Industrial Potential



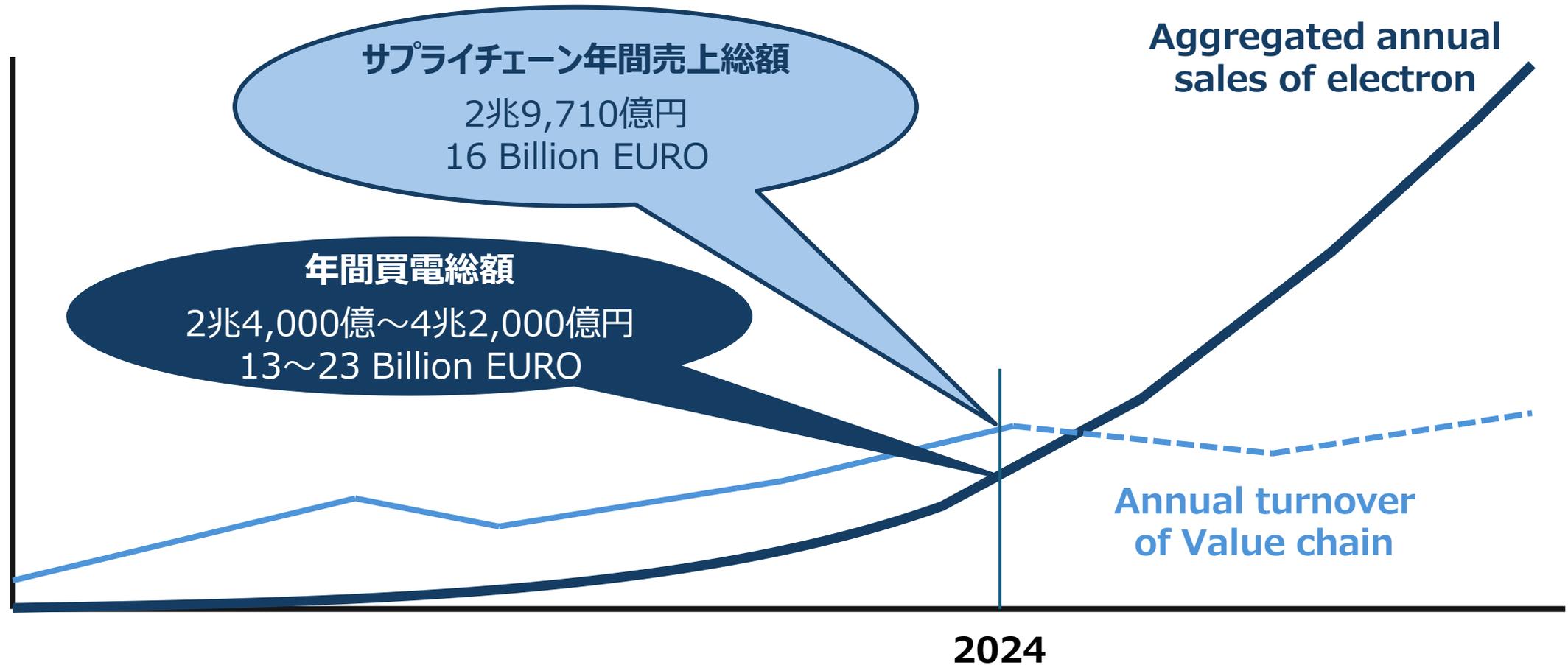
Wind energy manufacturing Components

Wind sector
○ Offshore*
○ Onshore

*includes facilities with onshore and offshore



欧州: 規模感 / Europe: Image of the scale



EU: “本義”の実現 / Materializing “the purpose”

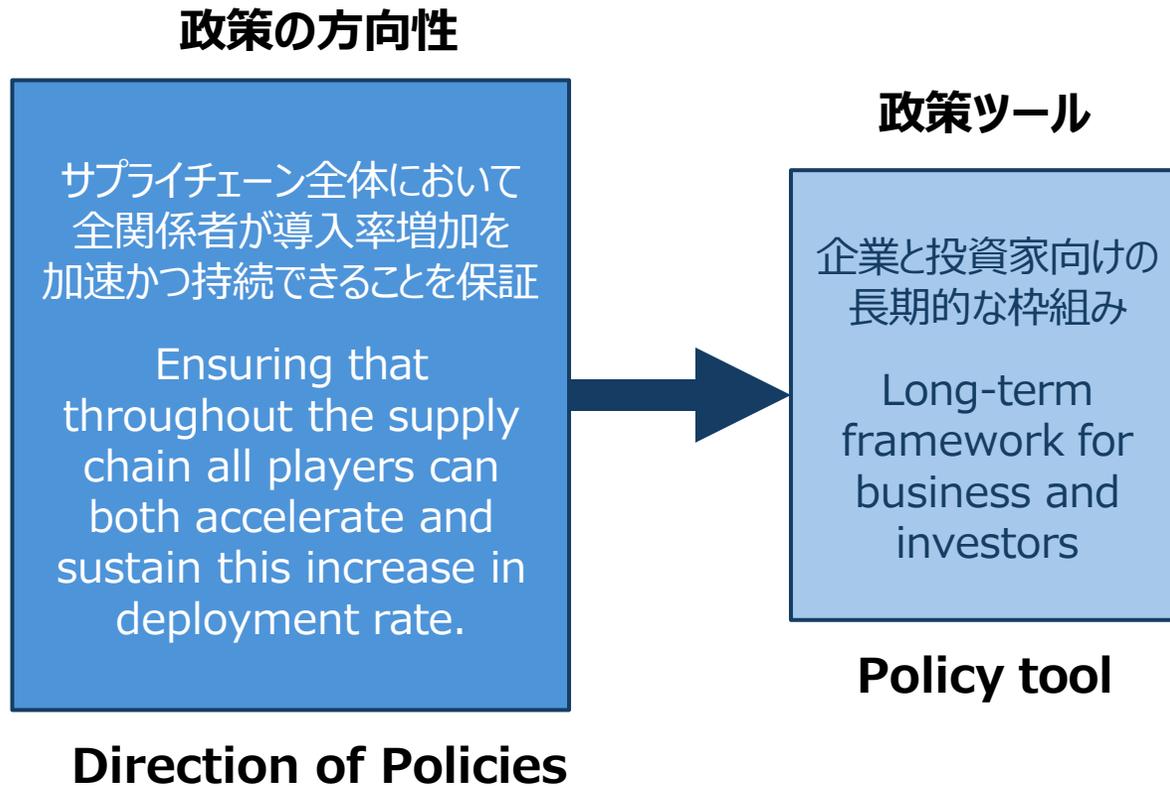
政策の方向性

サプライチェーン全体において
全関係者が導入率増加を
加速かつ持続できることを保証

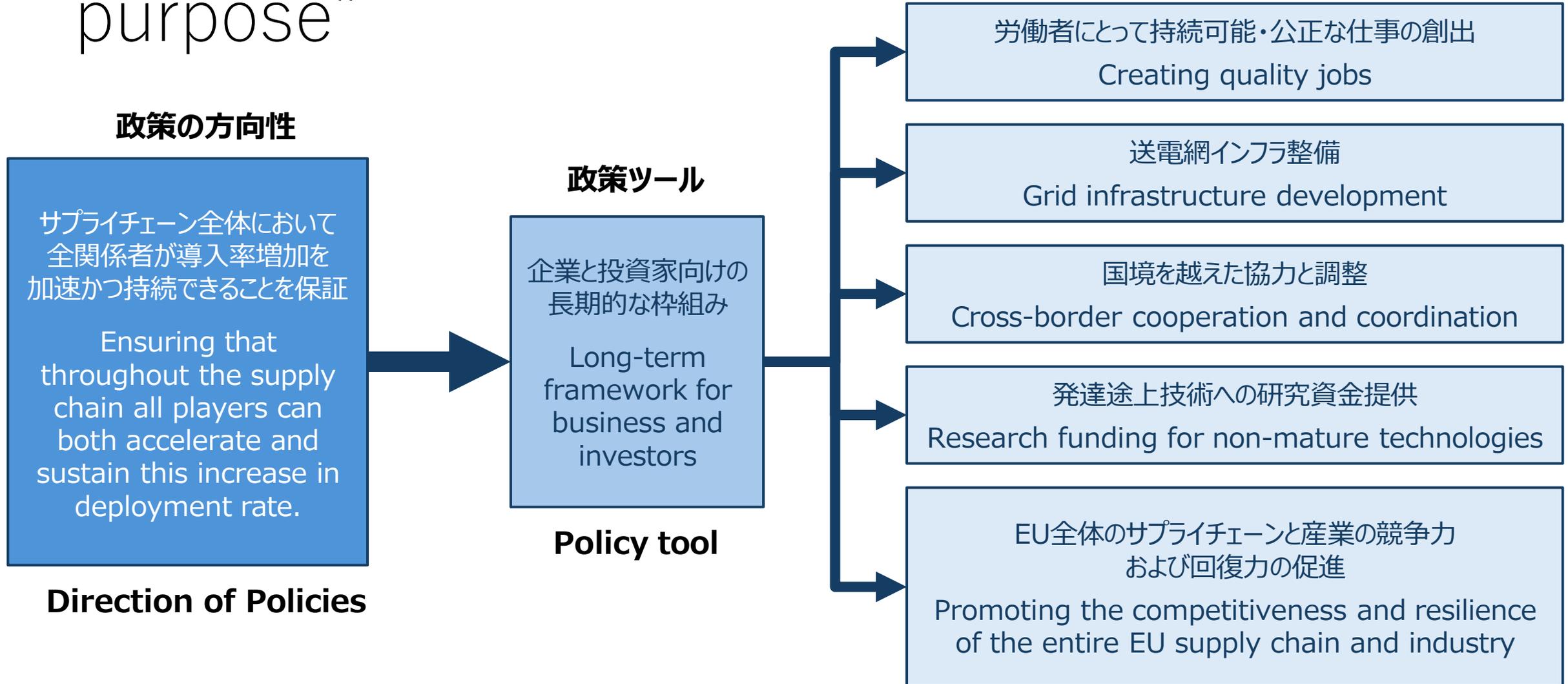
Ensuring that
throughout the supply
chain all players can
both accelerate and
sustain this increase in
deployment rate.

Direction of Policies

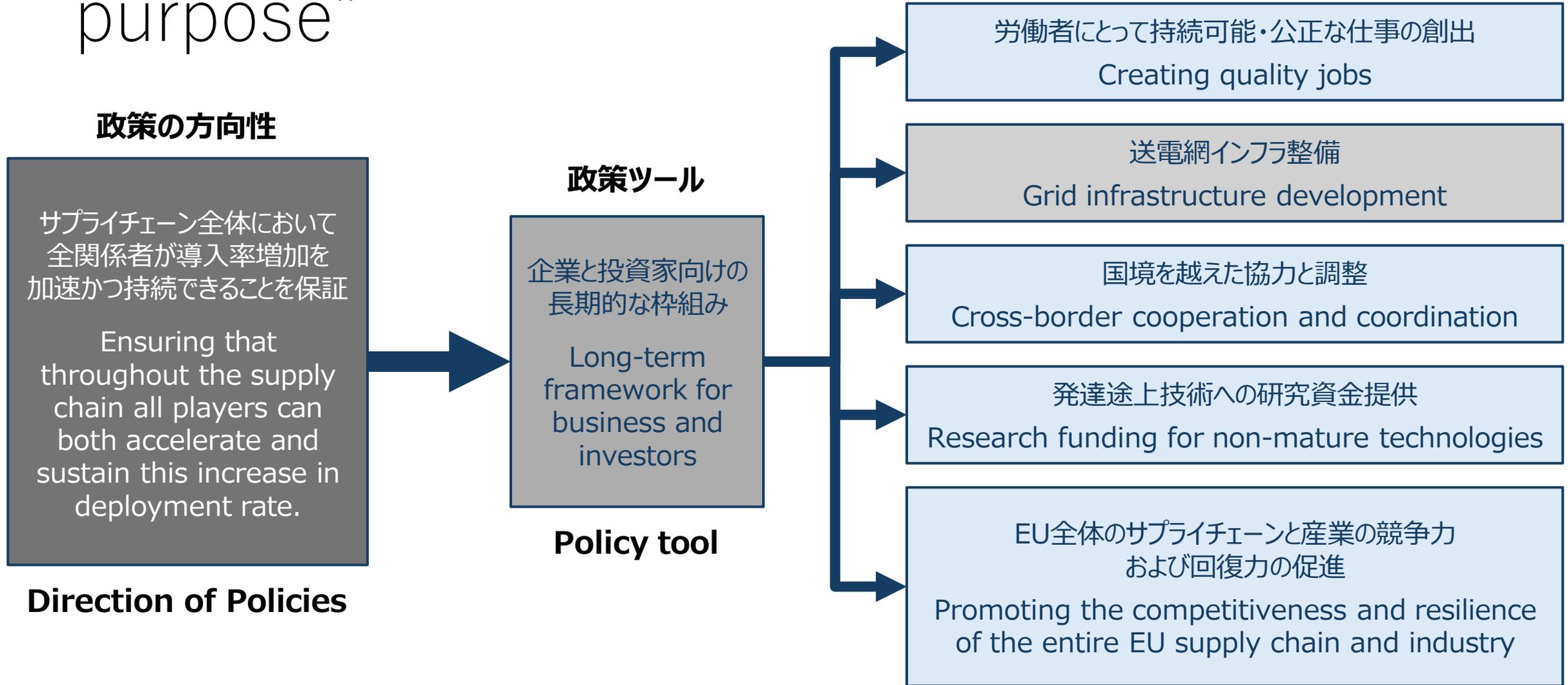
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欧州：開発策修正 / Europe: Reforming Development

なぜ欧州で発展？

1. エネルギー安全保障と
温室効果ガス削減
2. 洋上風力に適した
地理的環境
3. Energy security and
Greenhouse Gas
reduction
4. Suitable geographical
environment for
Offshore Wind
(North Sea)

Why Europe?

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欧州で何が起きた？

補助金を撤廃して低価格を狙った入札が各国で急速に展開、ゼロ入札が頻発すると共に、サプライチェーンの収益悪化が恒常的に

The abolition of subsidies and rapid expansion of low-price bidding led frequent zero-bid auctions and made supply chain profit deterioration a constant reality.

What's wrong?

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発電事業者の収益安定性を強化: CfDにおける Strike Price上限を引き上げ、インフレ調整的な条項の導入、契約期間を延長

Enhancing the Revenue Stability of Developers: Lifting the upper limit on strike prices in Contracts for Difference (CfDs), introducing inflation adjustment-alike clauses, and extending contract durations.

サプライチェーンの収益性向上を直接挺入れ: Clean Industry Bonusによって産業政策とエネルギー政策を統合 (英)、補助金復活 (蘭)、非価格基準導入 (独)

Directly boosting supply chain profitability: Clean Industry Bonus (UK), subsidy (Netherlands), Unpriced criteria (Germany)

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欧州: 地方自治体の役割 / Europe: Role of the regions

洋上風力発電産業振興において、地方自治体の果たす役割は極めて大きい

The role of local governments in promoting the offshore wind power industry is extremely significant.

港湾の産業拠点化はサプライチェーンの採算向上に繋がるが、その**決定権と投資判断の多く**を地方自治体が担っている

Industrialising ports can enhance the profitability of supply chains, and local authorities retain **much of the decision-making and investment authority.**

製造・建設現場や O&M拠点における**地場企業振興**や、**そこで働く要員の職業訓練**は地方自治体が担っている

Local authorities are responsible for **promoting local businesses and providing vocational training for personnel** working at manufacturing, construction and O&M bases.

ケーブル・変電設備・系統や道路・訓練施設の**許認可**、そして**地元環境配慮の多く**は地方自治体の管轄

Local authorities are responsible for **licensing** cables, substations, power systems, roads and training facilities, as well as **much of the consideration for the local environment.**

英国: 市場創出型 / UK: Market-creation type

開発難易度の高い北海油田の最大の開発国であった経緯から、サプライチェーン形成に重きを置いて洋上風力発電産業を振興している

Building on the key role in developing challenging North Sea oil and gas fields through construction and manufacturing, they aim to establish a supply chain to support the growth of the offshore wind power industry.

洋上風力市場をまず創出、更にCfD制度によって発電事業者の収益を長期で安定させた。その結果、民間投資が継続的に流入し、世界最大級の市場に成長した

The UK has **established the offshore wind market at first**, and then the CfD system guaranteed stable and long-term revenues for developers. Consequently, private investment flowed in continuously, establishing it as one of the world's largest markets..

港湾近隣で産業が育成されることに着目して港湾開発を促進、Siemens Gamesaのブレード工場として旧工業港を転換し、20年以上継続するO&Mのために安定雇用を創出している

Developing ports by focusing on fostering industries near the port, a former industrial port was converted into a Siemens Gamesa blade factory, creating stable employment for over 20 years of ongoing O&M..

産業振興を制度に組み込んだCfD第7ラウンド（2025年）から**クリーン産業ボーナス制度（CIB）**を導入、英国内サプライチェーン投資・雇用創出を評価項目に追加した

The CIB scheme was introduced in the 7th round of CfD (2025), which incorporates industrial promotion into the system. The scheme will add UK domestic supply chain investment and job creation as evaluation criteria..

オランダ: 中央集権型 / The Netherlands: Central type

開発初期の事業者主導の分散型開発の非効率・系統不足を解消するために、政府が計画段階から主導するセントラル方式に移行した

Government shifted to a centralized approach where it takes the lead from the planning stage, to resolve the inefficiencies and lack of coordination in business-led decentralized development in the early days.

サプライチェーン向けに補助金を再投入、タービン輸送船や施工船不足の解消を目指している

The Netherlands decided **to reinject subsidies into the supply chain** to address shortages of turbine transport vessels and construction ships.

補助金無しの入札モデルを修正、逆入札から**供給網投資を評価する入札方式へ**振り戻した。
2027年以降 CfD に移行し、OEMの収益安定化を重視する予定

The subsidy-free bidding model has been revised to move away from reverse auctions and towards **a system that evaluates supply chain investments**. Plans are in place to transition to Contracts for Difference (CfDs) after 2027 with the aim of stabilising the revenue of original equipment manufacturers (OEMs).

デンマーク: 調整型 / Denmark: Coordination type

タービン製造者2社を中核として関連産業が発展してきた経緯に鑑み、サプライチェーン能力そのものを強化する政策に移行した

Government shifted to the policy to strengthen supply chain capabilities, given the history of related industries developing around two turbine manufacturers.

港湾近隣で産業が育成されることに着目して、**Esbjerg港などの洋上風力専用設備の強化を計画している**

Focusing on fostering industry in port areas, **plans are underway to enhance dedicated offshore wind facilities such as Esbjerg port.**

開発案件入札前に**タービンメーカー・施工業者・港湾オペレーター・金融機関等と政府とが協議**し、現実的な供給能力に合わせて入札要件を調整する

The turbine manufacturers, construction contractors, port operators, financial institutions, and other relevant parties shall consult with the government prior to tendering for development projects, to adjust tender requirements in line with realistic supply capacity.

A photograph of an offshore wind turbine's maintenance platform. The platform is a large, yellow, cylindrical structure with a white tower section on top. It is situated in the middle of the ocean. A smaller yellow boat is docked at the platform. The sky is blue with some light clouds. The text "ご清聴ありがとうございました" and "Thank you for listening!" is overlaid on the image in white.

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Thank you for
listening!