PANEL DISCUSSION:

Using Evaluation to Manage Risk in a Changing World

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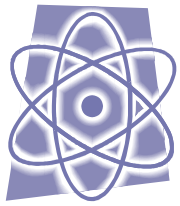
General situation in Japan



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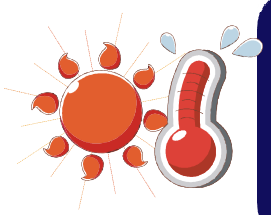
- 2 of 50 nuclear plants are expected online in summer 2012. Share of electricity by nuclear in 2030 is under discussion.



-18%
(-3%)

- Estimated demand and supply gap without nuclear in Kansai region (Osaka, Kyoto, etc.) in summer 2012.

10%+

- Increase in retail electricity price in Tokyo in 2012. (Residential price is still to be approved)

-25%??
by 2020

- Forced to reconsider CO2 emission reduction strategy.

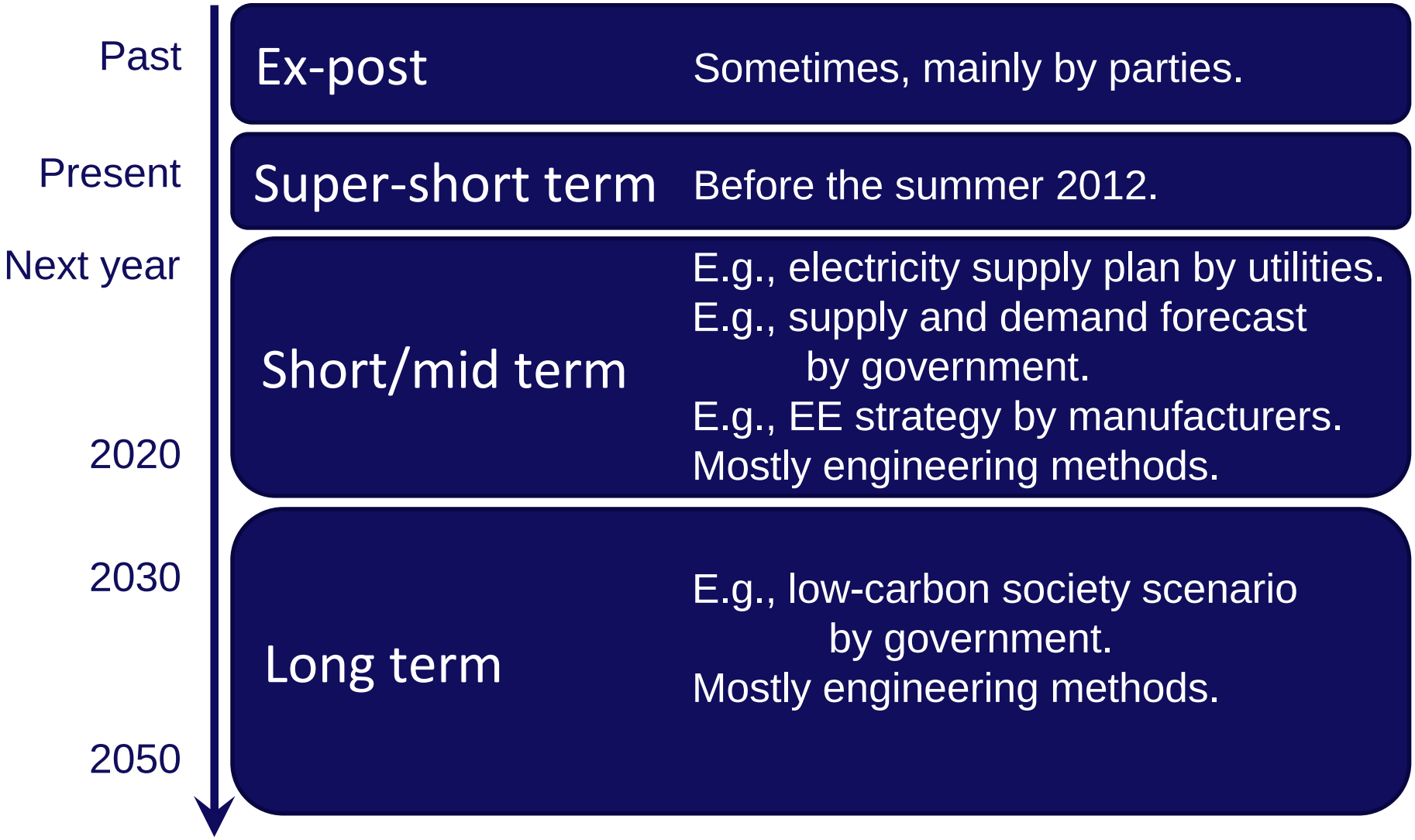
Energy efficiency

- Electricity shortages in 2011
  - Peak demand (kW) in Tokyo in the summer: -18%
  - Annual consumption (kWh) in Japan: -5%
  - Norms, burdens, weather, and depression.
- In the short term…
  - Persistence remains unclear.
- In the long term…
  - Ambitious scenarios typically assumes maximum efforts, e.g., introduction rate of 100%.
  - How are barriers removed?

How is EE incorporated?

- High expectations
  - Lessons learned from 2011 crisis.
    - Behavior changes play important roles.
  - Tough situation continues in supply side.
    - Capacity, electricity price, and carbon intensity.
  - Demand side managements are attracting more attention than ever.
- But more to do…
  - How to use behavior changes as a reliable resource.
  - Demand response are still at an early stage.

Quantitative estimates



Key actors and role of evaluation