

Global Energy Policy Research | GEPR

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?? ? · Friday, March 7th, 2025



Evgeny Gromov/iStock

CDU/CSU 2021 24.2 28.5
SPD 25.7 16.4 14.7 11.

AfD 10.4 20.8 FDP BSW

CDU/CSU AfD SPD SPD

SPD EU

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Posted in ??????????, ??, ?? | No Comments »

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?? ?? · Friday, March 7th, 2025



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ESG・SDGsブームの終焉

ESGブームの終焉 9/30

ESG投資の設定本数は急減
(四半期ベース) 2021年4Q

2015年 16 17 18 19 20 21 22 23

(注) モーニングスター・ダイレクトで追加型投資とETFを累計。基金投資のうち運用期間が最も長いものを対象。集計済みも含む。

世界のESG投資は22年に初の減少

2016 18 20 22年

(注) オセアニアは豪州とニュージーランド、北米は米国とカナダの合計
(出所) CSIA

藤枝 一也
×
杉山 大志

ESG・炭素クレジットの取組

藤枝 一也氏
素材メーカー 環境・CSR担当

登録

ESG・SDGsブームの終焉

ESGブームの終焉 10/30

米国サステナブルファンドの資金流入(2024年第3四半期)

Exhibit 1 US Fund Flows: ESG Vs. All US Funds (USD Billion)

2021年4Q

藤枝 一也
×
杉山 大志

ESG・炭素クレジットの取組

藤枝 一也氏
素材メーカー 環境・CSR担当

登録

Posted in ??????????, ???, ??? | No Comments »

??AI????????DOGE??

?? ?? · Thursday, March 6th, 2025



Tony Studio/iStock

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2022?11??ChatGPT????????2????????????AI????????????????????????????????????AI??
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1. ??????????15????????

No	項目	年間浪費額（概算）	問題点・課題
1	脱炭素・カーボンニュートラル政策	約 15～20 兆円	CO2 削減の効果はゼロに近いのに国民負担増大
2	巨大公共事業（不要インフラ）	約 5～10 兆円	需要がない道路・橋・新幹線・ダム建設の継続
3	官僚の天下り・随意契約	約 3～4 兆円	官僚 OB が天下る法人への不要な発注が多発
4	外国人の健康保険不正利用	約 2～3 兆円	海外在住の家族にも適用され、医療費が流出
5	ODA（海外援助）	約 5,000 億～1 兆円	必要性や効果が不明確な支援が存在
6	補助金・助成金の不正支出	約 3～5 兆円	企業や個人が不正に受給し、成果が不明瞭
7	外国人留学生への奨学金・生活費支給	約 3,000～5,000 億円	日本人学生には貸与型が中心なのに外国人は無償
8	政治家の不透明な経費（政党交付金など）	約 3,000 億～5,000 億円	使途不明金が多く、監査が不十分
9	生活保護・年金の外国人不正受給	約 1～2 兆円	条件を満たさない外国人が受給
10	IT システム開発の浪費	約 5,000 億～1 兆円	マイナンバーなどの IT 開発で予算超過・失敗
11	防衛装備品の不透明な高額契約	約 1～3 兆円	米国からの武器調達が高割
12	外国人労働者の無計画な受け入れ	雇用悪化の影響額 数兆円規模	低賃金労働者が増え、日本人の雇用環境が悪化
13	教育・研究機関の非効率な資金配分	約 5,000 億～1 兆円	役に立たない研究への補助金が多い
14	オリンピック・万博の予算超過	約 1～2 兆円	事前の見積もりより数倍のコスト
15	地方自治体の過剰な支出	約 1～2 兆円	利権化した補助金や無駄なイベント開催

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2. ?????????

No	対象	削減方法
1	脱炭素政策	EV 補助金・太陽光パネル補助金を廃止、火力・原発活用へ転換
2	巨大公共事業	需要がない道路・ダム・新幹線計画を全面見直し
3	官僚の天下り	退職後の特殊法人・独立行政法人への天下り禁止、随意契約の全面公開
4	外国人の健康保険	扶養対象を国内居住者のみに限定、不正請求の厳罰化
5	ODA	不必要な支援を完全停止、本当に必要な国へ限定
6	補助金・助成金	透明性の確保、外部監査制度導入
7	外国人留学生支援	奨学金は貸与型へ統一、日本人学生の支援を優先
8	政治家経費	政党交付金の削減、使途公開義務付け
9	生活保護・年金の外国人受給	永住権のない外国人への支給廃止、厳格な審査
10	IT システム開発	官民監査機関を設立し、ムダなシステム開発を排除
11	防衛費の見直し	兵器の国産化を進め、米国依存を減らす
12	外国人労働者受け入れ	高度人材以外の受け入れ制限
13	教育・研究資金	成果が不明な学術研究の補助金を削減、日本人学生の研究支援へ転換
14	オリンピック・万博	予算上限を設定し、超過分の補填は主催者負担
15	地方自治体の支出	役に立たない補助金・イベント開催を廃止

3. ???50????

重要度	用途	必要額（概算）	具体策
1	消費税撤廃 or 5%以下に引き下げ	約 20 兆円	国民負担を大幅削減
2	子育て・教育支援	約 3 兆円	出産費用無償化・大学無償化
3	地方経済活性化	約 3 兆円	過疎地域への投資・地方移住支援
4	医療・高齢者福祉	約 2 兆円	介護・医療費補助の拡充
5	防衛力強化	約 3 兆円	自主防衛の強化（国産化推進）
6	エネルギー安定化	約 2 兆円	原発・火力発電の活用で電気代削減
7	最低賃金引き上げ・中小企業支援	約 3 兆円	企業支援とセットで賃上げ促進

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Posted in ??????????, ??, ?? | No Comments »

AI????????????????????

?? ?? · Tuesday, March 4th, 2025

2022?11??ChatGPT?????????2????????????AI????????????AI?????Microsoft?Google?Amazon
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hirun/iStock

1. ?????????????????

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支出項目	年間投入額 (概算)	問題点
再生可能エネルギー（太陽光・風力）補助金	約3~5兆円/年	中国製パネル依存、安定供給が不可能
EV（電気自動車）補助金	約2兆円/年	EV普及のための補助金が大企業優遇に
水素・蓄電池開発	約1~2兆円/年	実用化の見込みが不明瞭
企業向けCO2排出削減支援	約3兆円/年	排出権ビジネスに利用され、実質的な削減効果なし
インフラ更新（送電網整備）	約5兆円/年	再エネ偏重による無駄な送電網整備
その他（カーボンフリー戦略推進）	約2兆円/年	「環境ビジネス」としての補助金詐欺の温床

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2. ???CO2?????????????

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分野	必要財源 (概算)	具体的な施策
消費税引き下げ・ゼロ化	約 10～15 兆円	脱炭素のための負担をやめれば、消費税をゼロにできる
子育て・教育支援の強化	約 2 兆円	大学無償化、児童手当増額
地方経済活性化	約 3 兆円	過疎地域の支援、移住支援
医療・高齢者福祉の拡充	約 2 兆円	介護・医療費補助の拡充
エネルギー安全保障	約 2 兆円	原発・火力発電の活用、エネルギー自給率の向上

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Posted in ??????????, ??? | No Comments »

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??? ?? · Monday, March 3rd, 2025

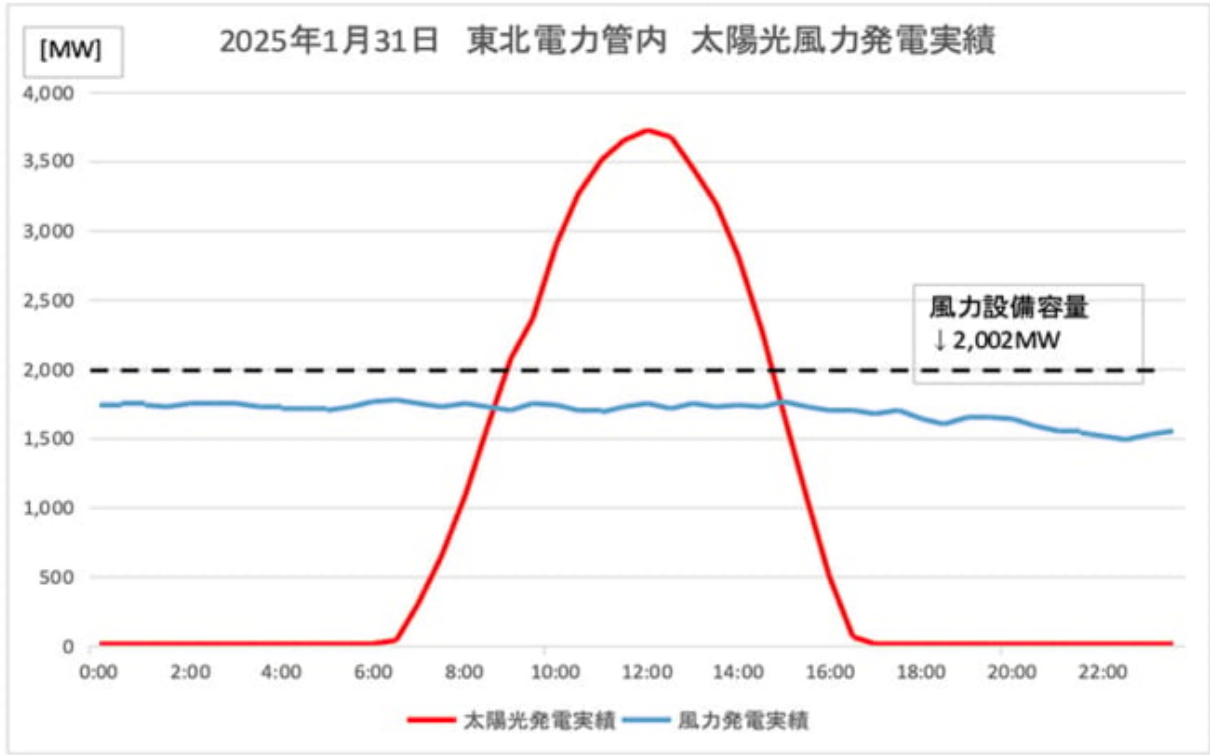


BirgerNiss/iStock

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2025年1月31日

2025年1月31日 東北電力管内 太陽光風力発電実績

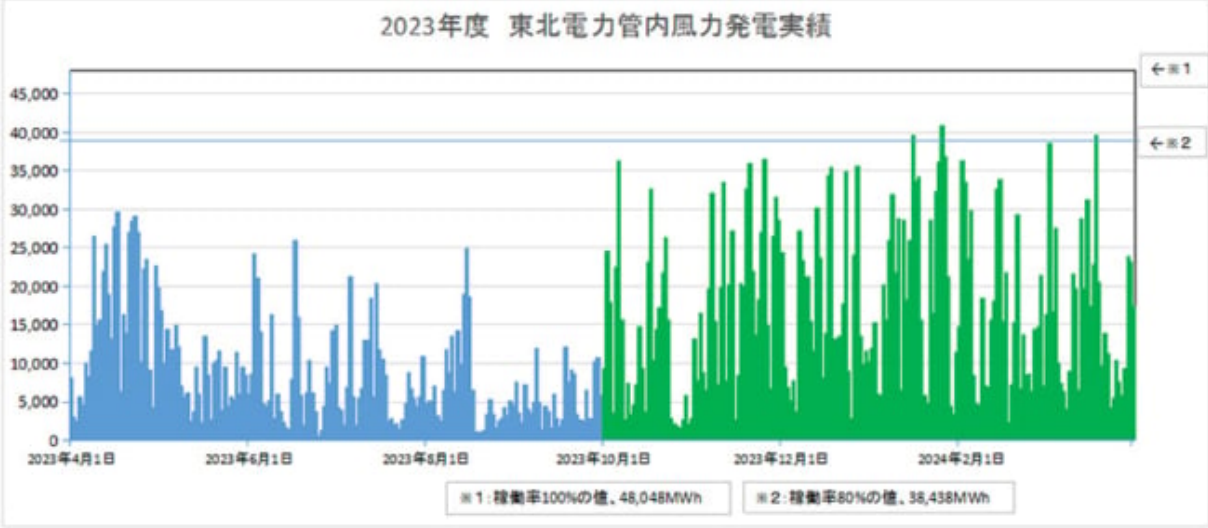
太陽光発電実績は、ピーク時に約3,700MWを記録し、風力発電実績は概ね1,500MWから1,800MWの間で推移しました。

風力設備容量は2,002MWです。

2. 太陽光発電

2025年1月31日 太陽光発電実績

太陽光発電は、ピーク時に約3,700MWを記録し、100%の稼働率を達成しました。



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Posted in ??????????, ??? | No Comments »

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?? ?? · Sunday, March 2nd, 2025

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©? NHK ??????

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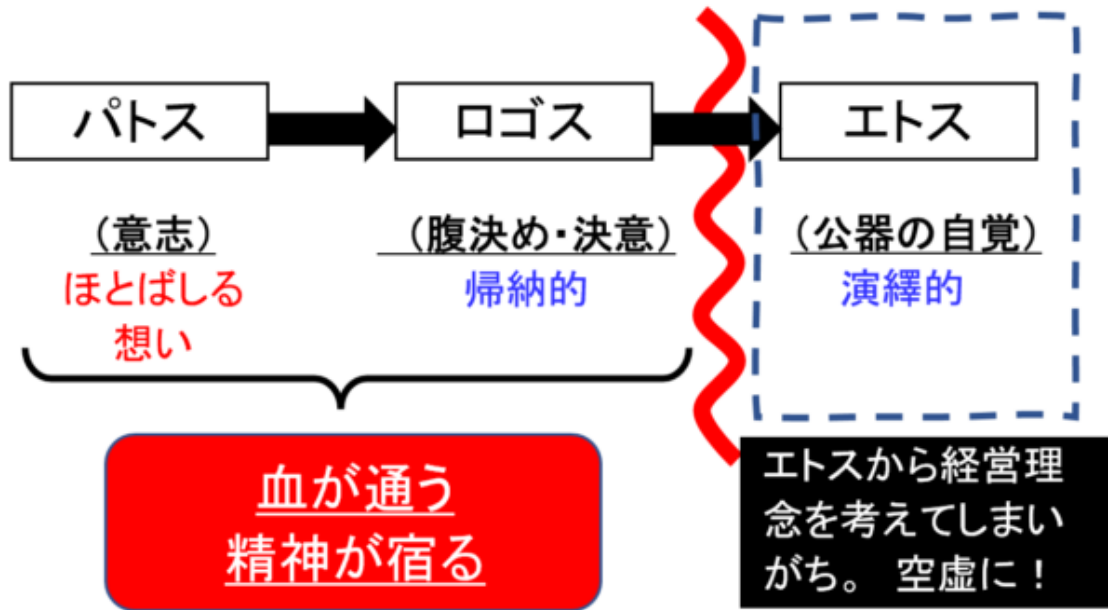
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©? <https://keiochi1016.client.jp/category1/entry27.html>

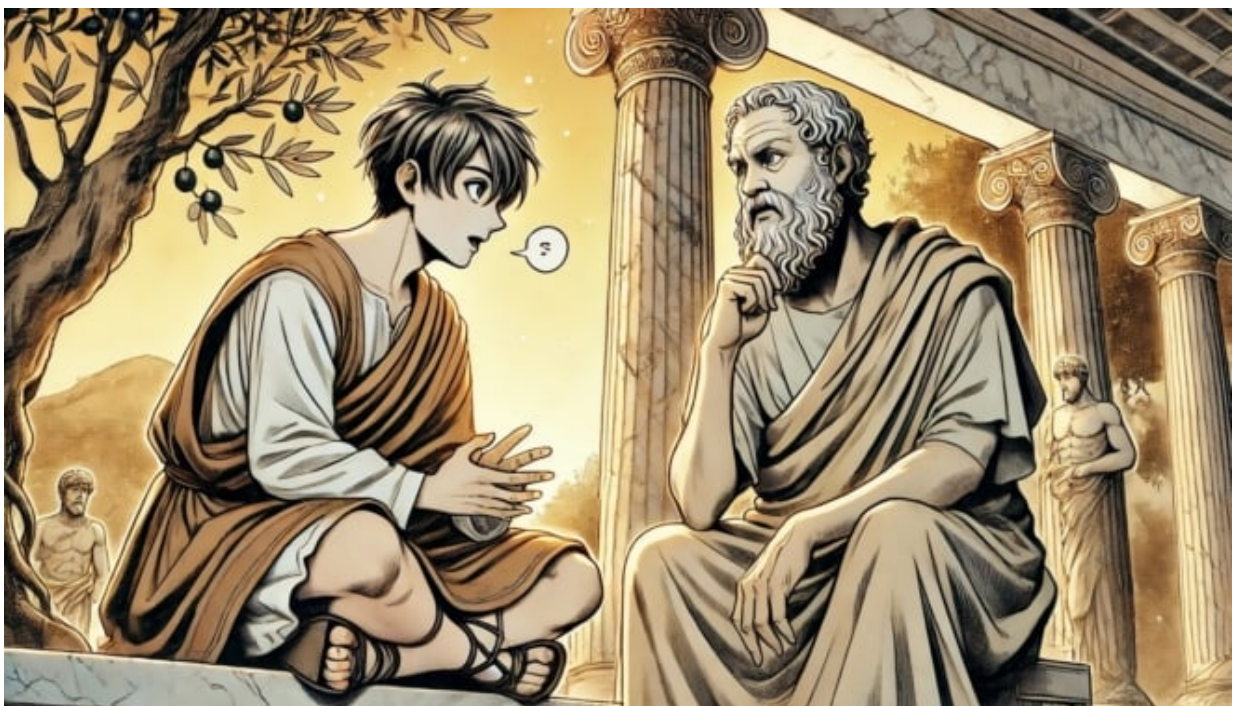
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Hokkaido Call 2024???

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Posted in ??, ????????? | No Comments »

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?? ?? · Sunday, March 2nd, 2025



Free art director/iStock

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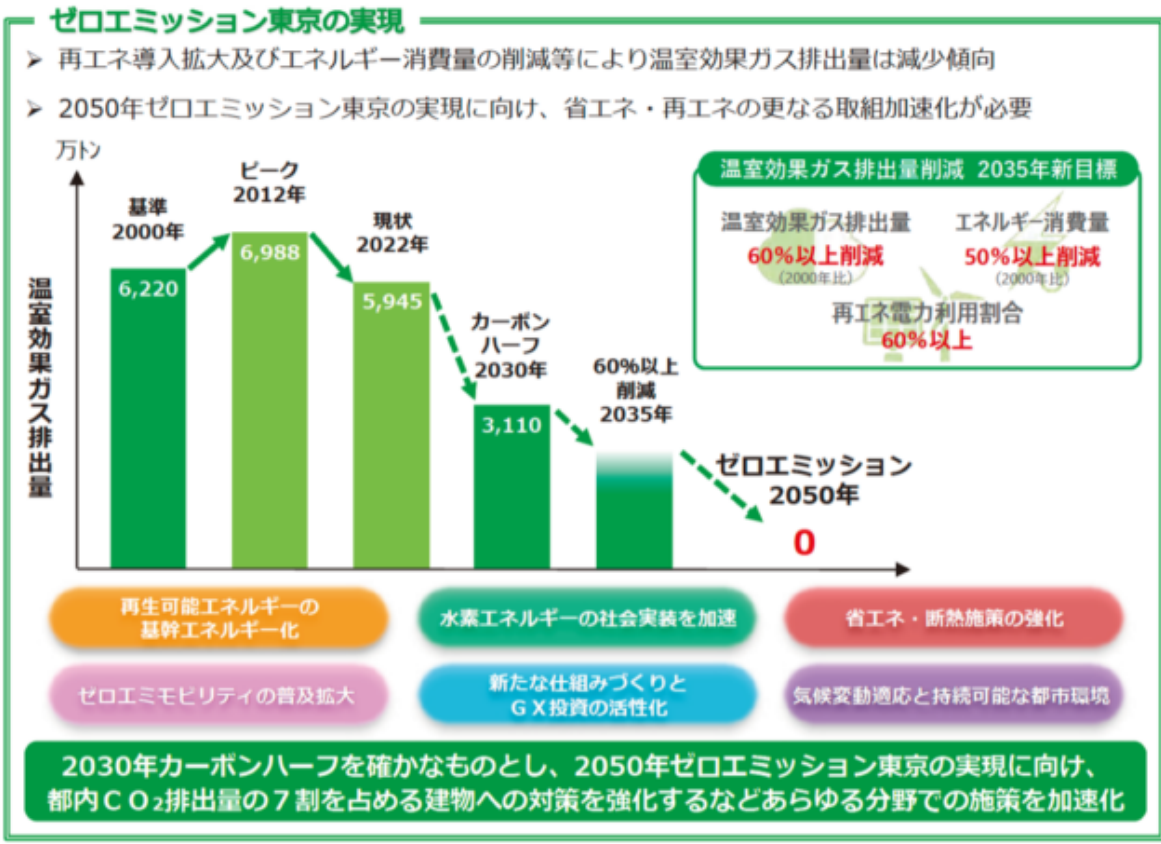
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V 世界のモデルとなる脱炭素都市

セーフシティ

1 ゼロエミッション東京の実現

⑦3,011億円 (⑥1,849億円)



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Posted in ??????????, ???, ????? | No Comments »

???CO2????????????????????????????????

?? ?? · Friday, February 28th, 2025



idesignimages/iStock

Unleashing American Energy – The White House EPA 2009 Endangerment Finding EF

EF CO2

EF CO2 GHG Clean Air Act

CO2 CO2

EPA CO2 CO2 CO2 NASA

EF EF

EF EF

Manhattan Contrarian

EF

How To Rescind The Endangerment Finding In A Way That Will Stick

EF????????????

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- ??15????????EF????????
- EF????EPA????GHG????

?2?EPA??????CO2????????

- 2009????????GHG????
- EPA????CO2????
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- ?????????
- ??100????
- ?????1?2????

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1. EPA????
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X2040??

Posted in ??????????, ??, ???? | No Comments »

?HSBC????????????????????????????????

?? ?? · Sunday, February 23rd, 2025



William Barton/iStock

ロイターを検索

hsbc [X] [Q]

「hsbc」の検索結果

8 検索結果 並び替え: 新しい... ▾

午後 3:01 GMT+9
**インド総合PMI、2月速報値は6
 カ月ぶり高水準 サービス業好調**



マーケット・2025年2月19日
**英HSBC、24年通期は増益 自
 社株買いとコスト削減目標発表**



マーケット・2025年2月19日
**英HSBC、パーレーンのリテー
 ル業務の売却で合意**



2025年2月19日
欧州市場サマリー(18日)



2025年2月19日
**ロンドン株式市場=反落、利下げ
 観測が後退**



????????????2025?2?22??

Google????????????????

hsbc

すべて ニュース 画像 地図 動画 ショッピング

1週間以内 ▾ 日付順 ▾ 重複を非表示 ▾ 詳細検索

Inv Investing.com 日本
 英規制当局、Citi、HSBC、Morgan Stanley、RBCに制裁金を科す 執筆
 17 分前

ESG Journal
 HSBC AM、SP Mobilityに投資しシンガポールのEV充電ネットワーク拡大支援
 10 時間前

LifeVancouver カナダ・バンクーバー...
 HSBCワールドラグビー・セブンズシリーズ (HSBC Rugby SVNS Vancouver 2025) (2025-02-21)
 15 時間前

Inv Investing.com 日本
 HSBCが20億ドルの自社株買いプログラムを開始 執筆
 23 時間前

???Google?????2025?2?22??

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- ??????????????????????2024?10??
- ??????????2030?????????2024?7??
- ??????????????????????2024?6??
- ??????????????????????SBTi?????2024?4??
- ESG?????????????????CO2?????????????2021?11??

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Posted in ??????????, ???, ??? | No Comments »

????30??

?? ?? · Friday, February 21st, 2025



jittawit.21/iStock

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2022?3???4??30?????????????The heatwave scorching India and Pakistan has been made 30 times more likely by the climate crisis??????

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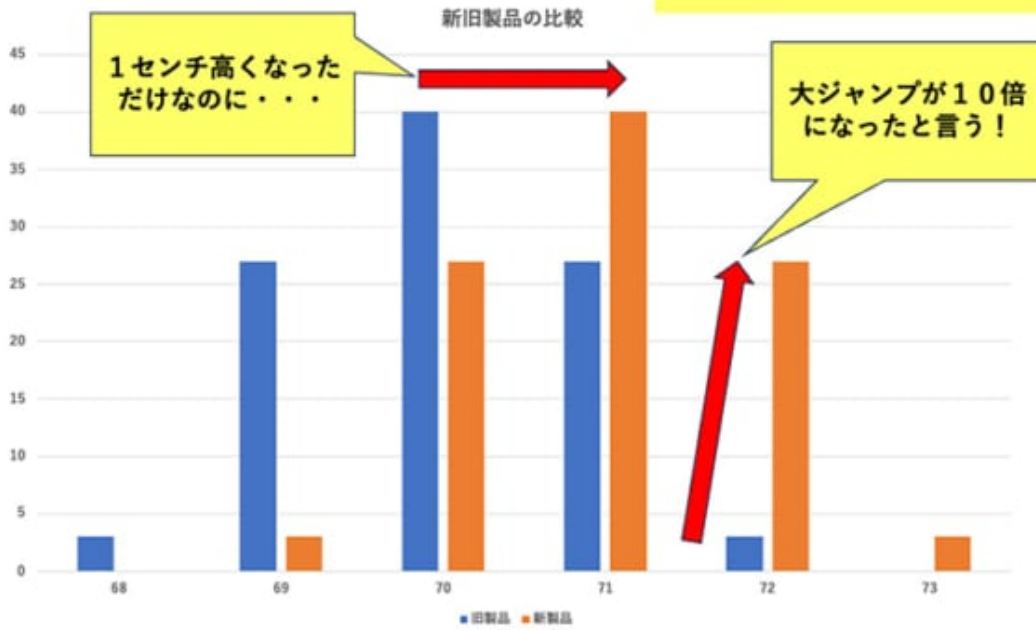
????30??1????????????????????

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バスケットシューズ詐欺



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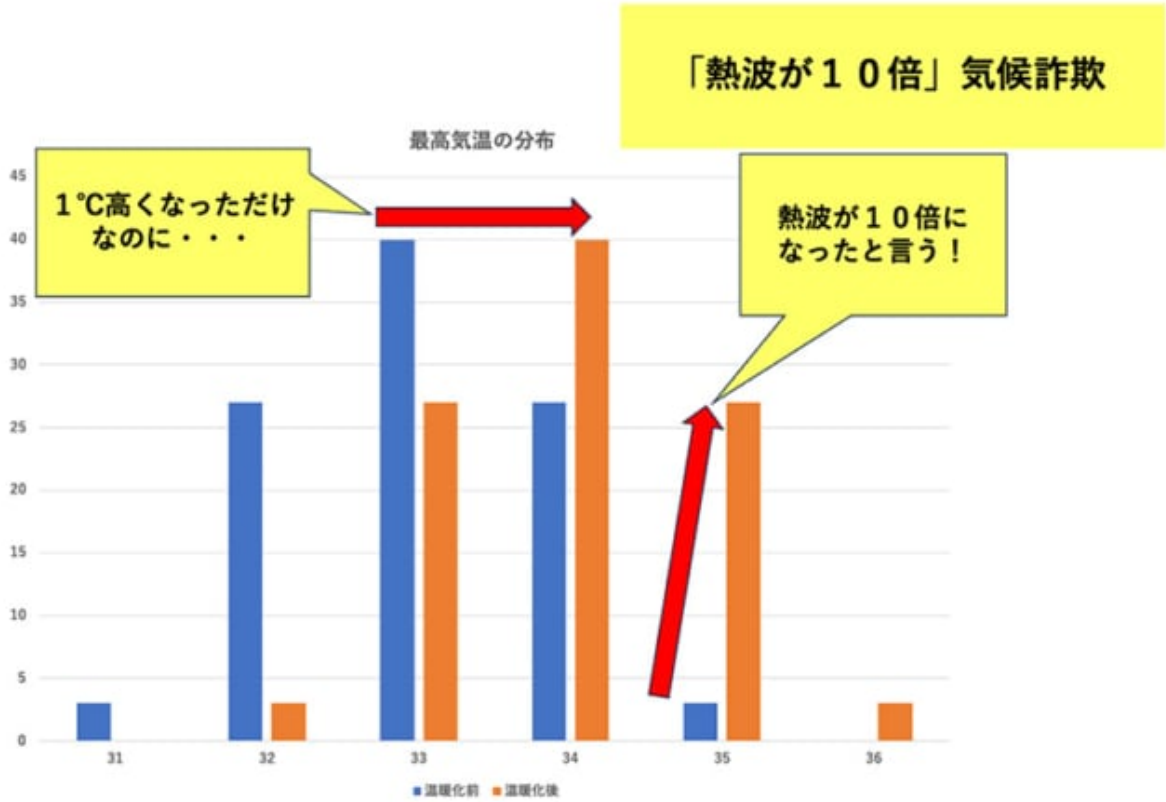
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Posted in ???, ????? | No Comments »

?SEC????CO2????????????????

?? ?? · Wednesday, February 19th, 2025



hapabapa/iStock

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賛成	大和証券株式会社、ゴールドマン・サックス証券株式会社、公益社団法人日本証券アナリスト協会、PwC Japan 有限責任監査法人、EY 新日本有限責任監査法人、有限責任あずさ監査法人、日本公認会計士協会
反対	一般社団法人日本鉄鋼連盟、一般社団法人不動産協会、一般社団法人日本経済団体連合会、公益社団法人関西経済連合会、電気事業連合会

1?SSBJ?????????
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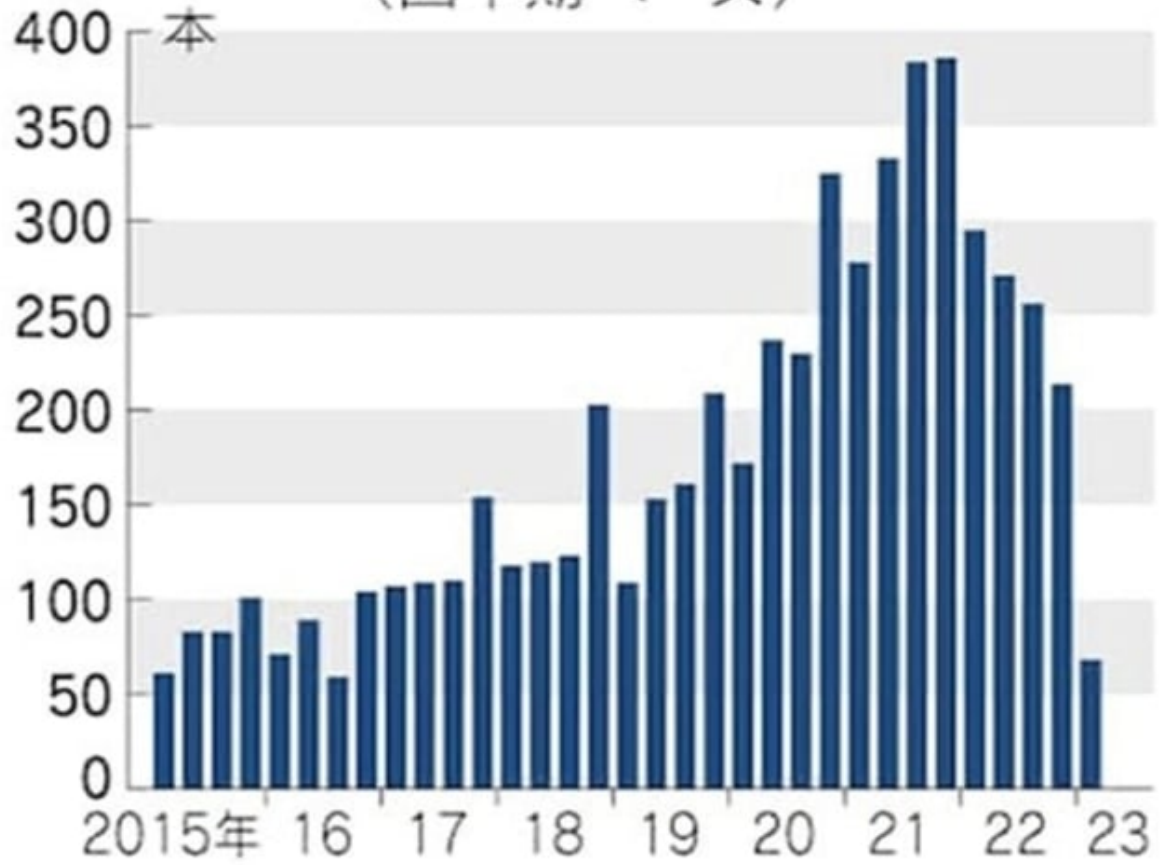


S????G????????E??2????????????????????????????
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2024????????????????????????

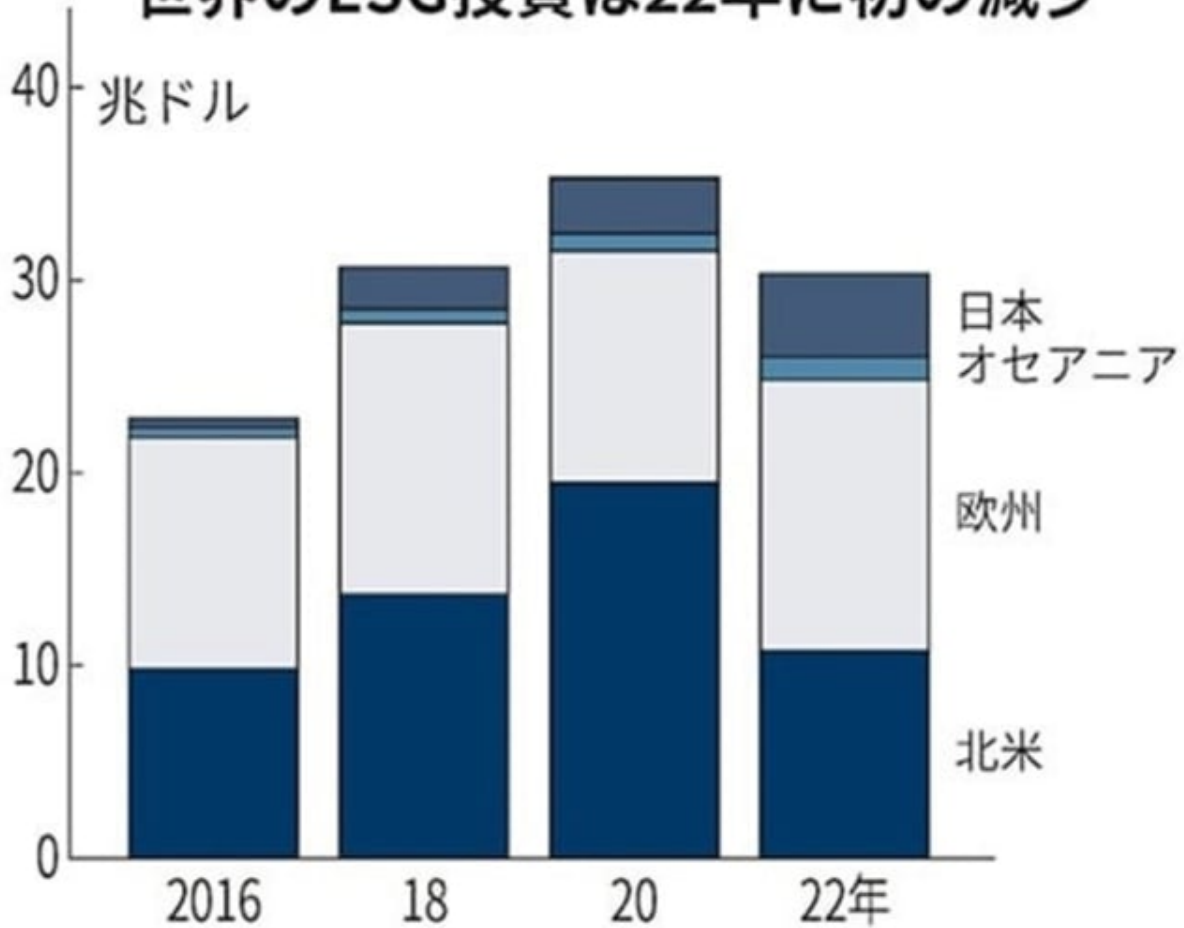
ESG投信の設定本数は急減 (四半期ベース)



(注) モーニングスター・ダイレクトで追加型投信とETFを集計。類似投信のうち運用期間が最も長いものが対象。償還済みも含む

??ESG??????
???2023?3?20??????

世界のESG投資は22年に初の減少



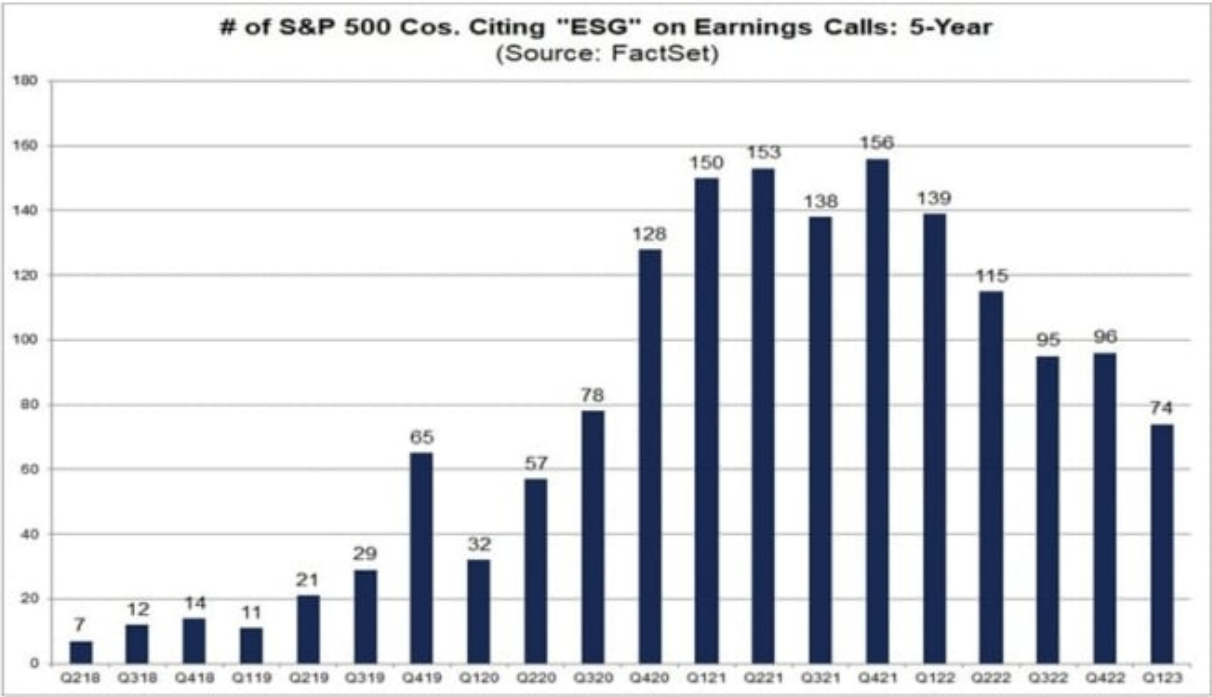
(注) オセアニアは豪州とニュージーランド、
北米は米国とカナダの合計

(出所) GSIA

ESG投資

2023年11月29日発表

世界のESG投資は2022年に初の減少



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S.E.C. Moves to Kill Climate Disclosure Rule



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Posted in ??????????, ???, ??? | No Comments »

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?? ?? · Monday, February 17th, 2025



tugores34/iStock

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Posted in ????????????, ???, ????? | No Comments »

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?? ??? ?? · Saturday, February 15th, 2025



Stadtrate/iStock

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?? ?? · Tuesday, February 11th, 2025



Edgar G. Biehle/iStock

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New Report Reveals Evidence of ESG Collusion Among Left-Wing Activists and Major Financial Institutions

Arjuna Capital, LLC?Arjuna????????????????????????????????

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Arjuna??Climate Action 100+?NZAM????????????

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Posted in ??????????, ???, ??? | No Comments »

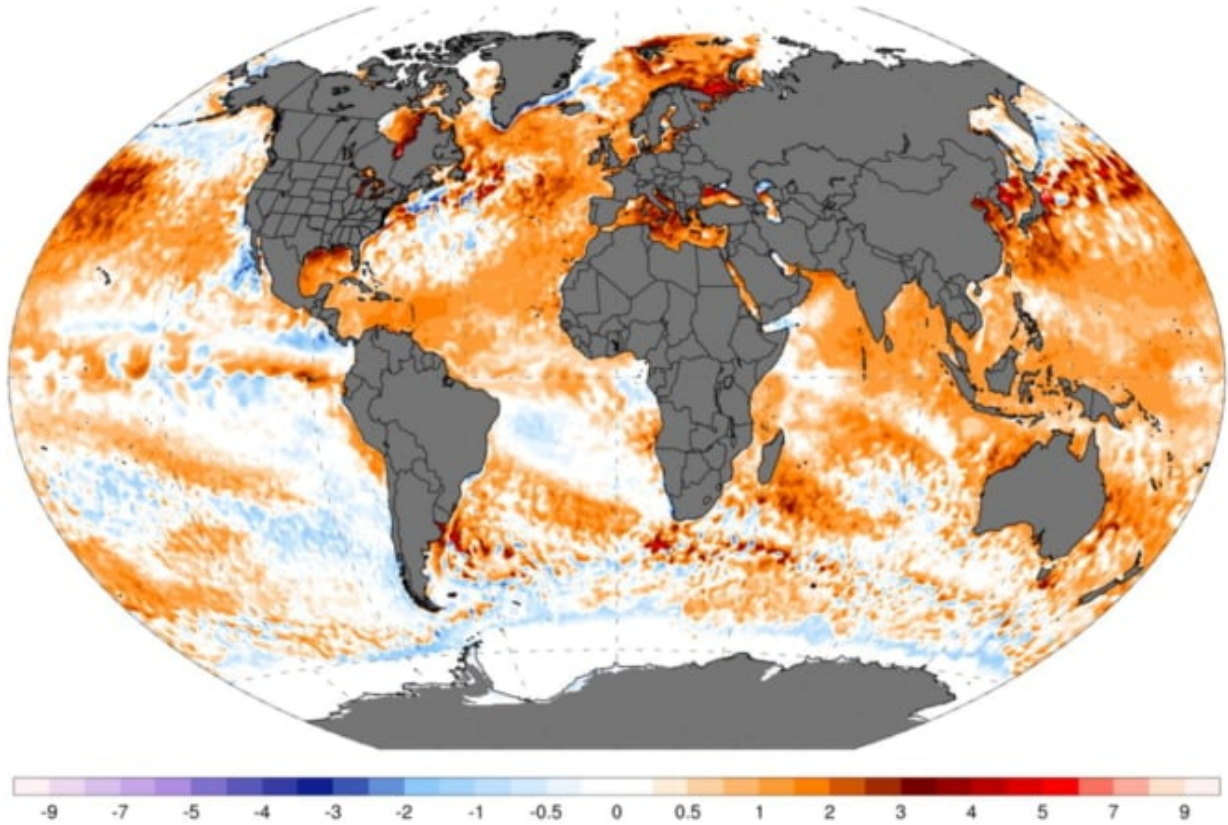
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?? ?? · Sunday, February 9th, 2025



leolintang/iStock

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- **?????AMOC??????**

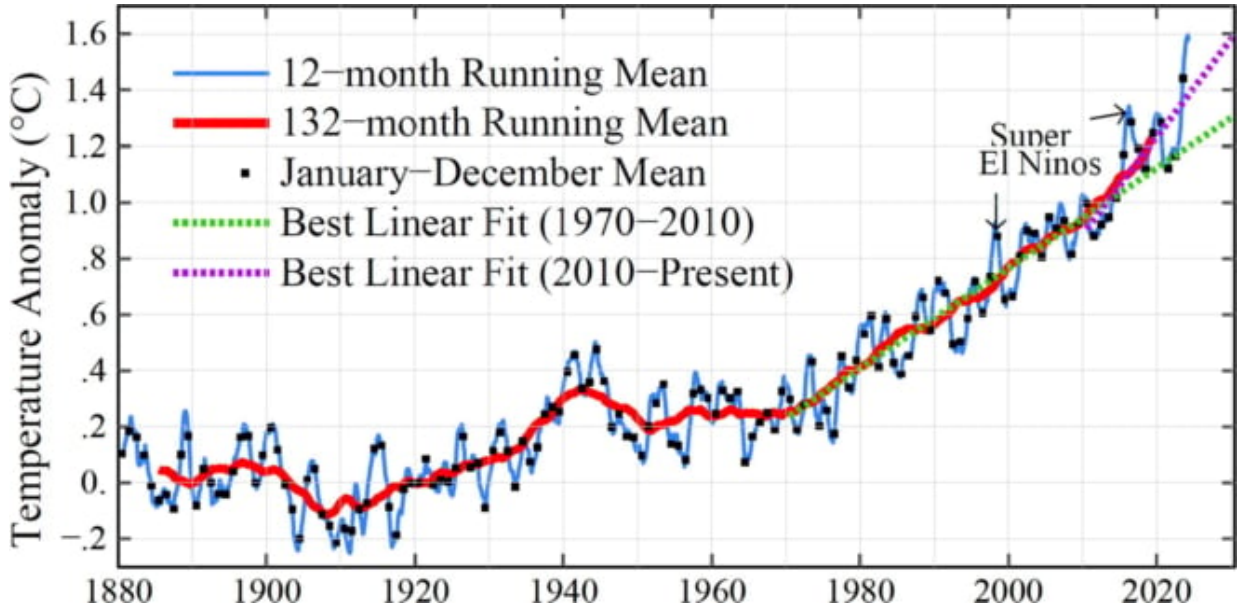
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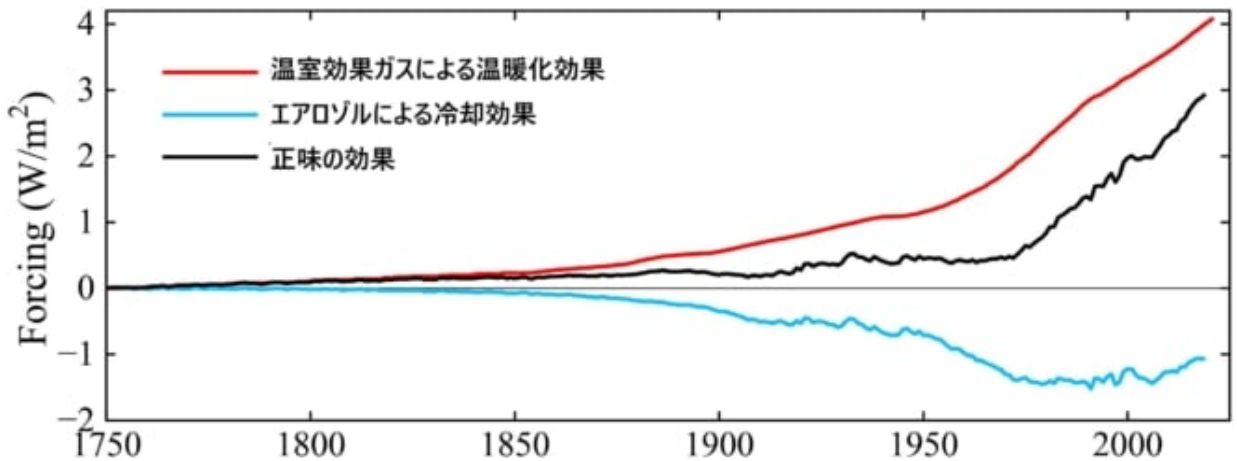
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Environment??????James E. Hansen et al.????????????????



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2020????? ?????????? ?????????????????????????????????????2045????? ??????????

????AMOC??? ???CO2??

Posted in ???, ????? | No Comments »

?ESG??

?? ?? · Sunday, February 9th, 2025



malerapaso/iStock

?????2024?6??

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New Report Reveals Evidence of ESG Collusion Among Left-Wing Activists and Major Financial Institutions



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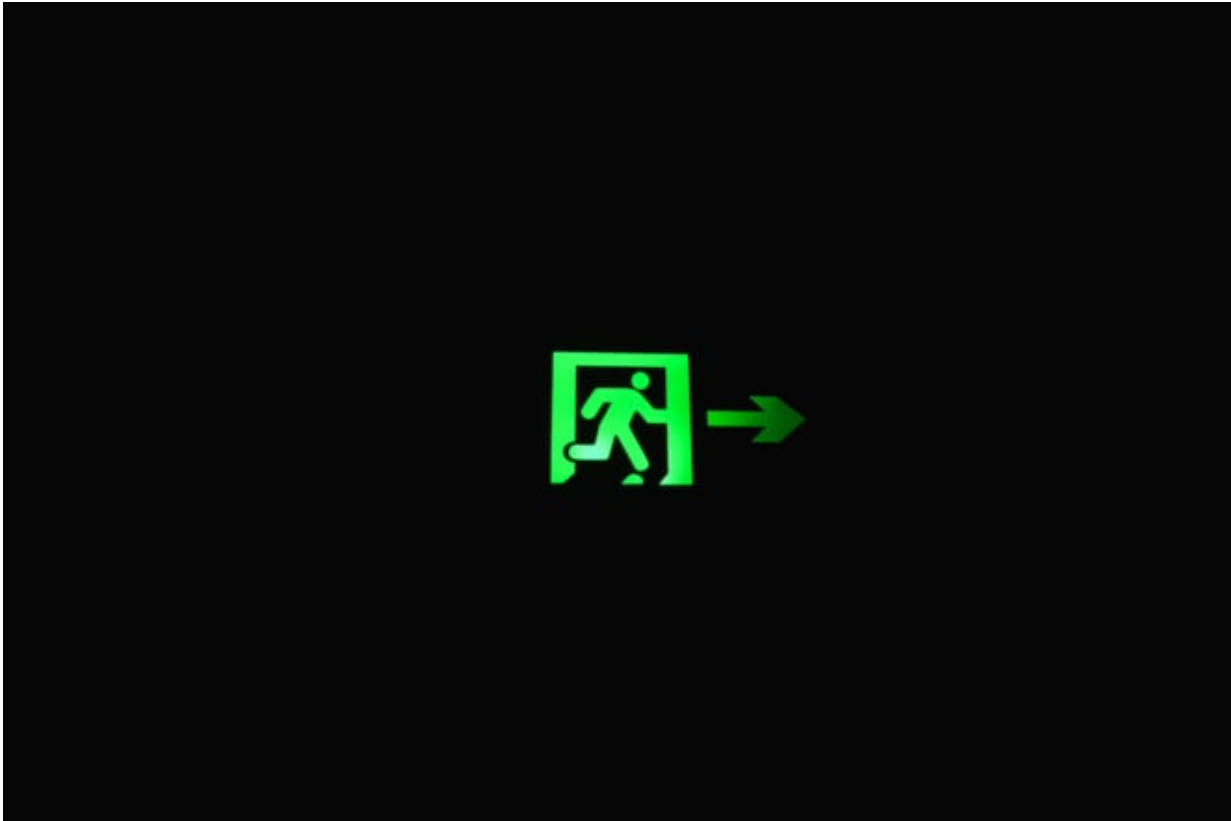
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Posted in ??????????, ???, ??? | No Comments »

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?? ?? · Friday, February 7th, 2025



patchanan promunat/iStock

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New Report Reveals Evidence of ESG Collusion Among Left-Wing Activists and Major Financial Institutions



Ceres??
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Ceres
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Name	Id	Engagemen	Engagema	C De	CC	Li	O	Research	Notes
Report on lobbying (BA, 2023 Resolution)	a015c0001a015c00000J	Boeing Co.							<p>{1} <a href="https://www.politico.eu/article/brussels-eu-media-p...
Report on lobbying in line with net zero GHG com	a015c0001a015c00000P	Boeing Co.							<p>{1} <a href="https://www.jpcc.ch/report/ar6/yr/downloads/resp...
Report on GHG targets and transition plan (1.5C a	a015c0001a015c00000c	Boeing Co.							<p>{1} <a href="https://www.jpcc.ch/report/ar6/yr/downloads/resp...
Report on lobbying (BA, 2024 Resolution)	a01V40001a01V400000C	Boeing Co.							<p>{1} <a href="https://www.seattletimes.com/business/boeing-com...
Report on risks from oil and gas exploration and	a015c0001a015c00000J	Exxon Mobil Corporation							
Report on climate-related just transition plan (XO	a015c0001a015c00000J	Exxon Mobil Cor							<p>em style="font-size: 12px;">As co-lead investor of the Climate Action 100-
Report on climate-related transition plan (XOM, 2	a015c0001a015c00000J	Exxon Mobil Cor							<p>Dialogue coordinated through the UK Transition Plan Taskforce</p>
Climate Action 100+ Agenda (XOM, 2023 Dialogu	a015c0001a015c00000J	Exxon Mobil Corporation							
Vote against board chair/CEO (XOM, 2023 Direct	a015c0001a015c00000J	Exxon Mobil Corporation							
Needs Review (XOM, 2023 Resolution)	a015c0001a015c00000J	Exxon Mobil Corporation							<p>{1} See, e.g., City and County of Honolulu v. ExxonMobil et al. 10

Ceres??2024?3?22??Ceres?????????????????
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??ESG?G????????????????????????????????????
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Posted in ???????????, ???, ??? | No Comments »

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?? ?? · Thursday, February 6th, 2025



Thx4Stock/iStock

??10????????2024?6?11??

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New Report Reveals Evidence of ESG Collusion Among Left-Wing Activists and Major Financial Institutions

4??Climate Action
 100+????????????????????Ceres????????????????????CalPERS????????????Arjuna
 Capital, LLC?Arjuna?????

Climate Action 100+?CalPERS????????????ESG??**most radical offenders**????????????????????Climate Action 100+?Ceres??

Climate Action
 100+??

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2019????????????????????????????????Climate Action 100+????????????????????????????Ceres??Ceres??

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Posted in ??????????, ???, ??? | No Comments »

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??? ?? · Thursday, February 6th, 2025



Young777/iStock

??5????????????????????????3??????????

9/18????????????16,409?KWh × 3? ? **49,229?KWh????**

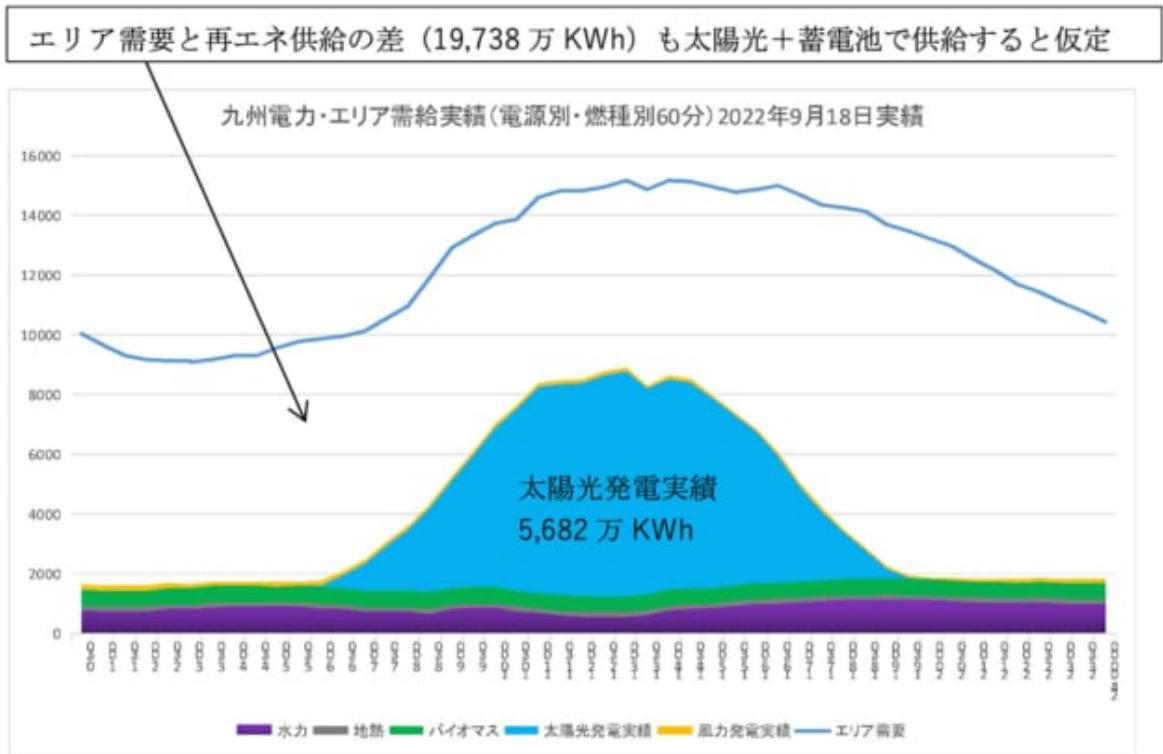
??2????????????????????????
 ?????????2024/7/9????????????????

7/9????????????5,682?KWh
 7/9????????????????????????????????19,738?KWh

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 ?????????2024/7/9????????????

49,229?2 ? 5,682 ? 19,738 ? **50,034?KWh????????????????????????**
 50,034?KWh ÷ 5,682?KWh ? 8.8?

2024/7/9????????????5,682?KWh????2024????????10????????????????????????????2024????????????????
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49,229?KWh ÷ 11.3?KWh ? 4,356?

3????????????????????4,356????????100%????????



「紀の川蓄電所」全景



蓄電池コンテナ

3. ORIX 2023 10 7,683,587MWh

3. 1. 2023 10 7,683,587MWh

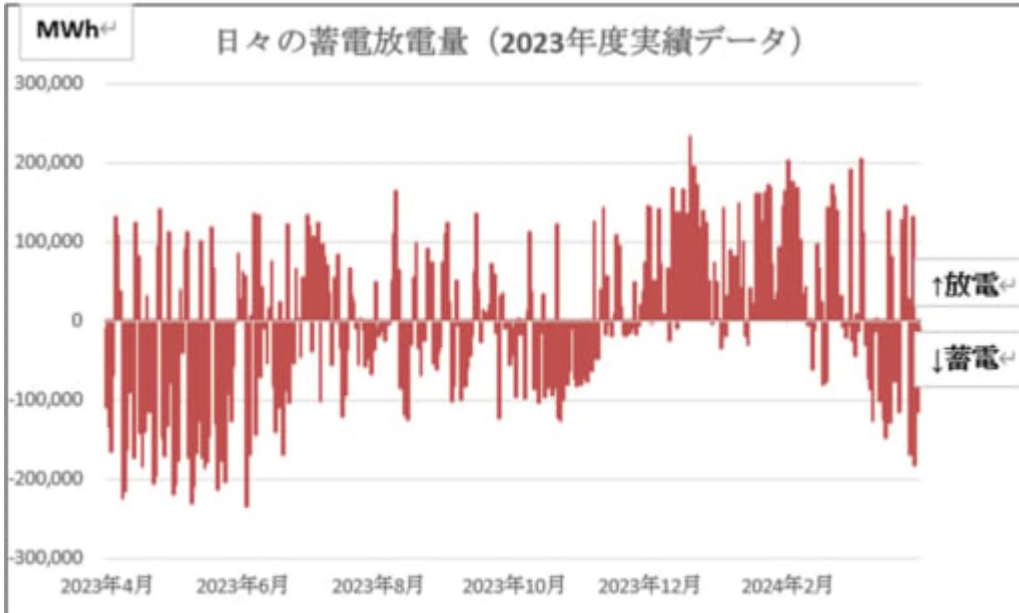
2023 10 7,683,587MWh

2023 10 7,683,587MWh

2023 10 7,683,587MWh

2023 10 7,683,587MWh

2023 10 7,683,587MWh



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 2023????????????????????5????????????

??????7,683,587MWh??

768,358?KWh ÷ 11.3?KWh ? 67,996 ?

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78,000? × 67,996? 544 km²

??????340km²??1.5????????????????????????????????

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	必要な太陽光 パネル量	必要な 蓄電池容量	蓄電池を設置 するスペース	蓄電池を設置 するコスト
3日間の曇りに対応する	2024年の 10倍	49,229万 KWh	34 km ²	34兆4600億円
1年間の供給に対応する	2024年の 5倍	768,358万 KWh	※544 km ²	※537兆8506億円

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KSBW????????

Posted in ??????????, ??? | No Comments »

IEA????????????????????

?? ? · Monday, February 3rd, 2025



travellinglight/iStock

1 29 National Centre for Energy Analytics
IEA – IEA World Energy Outlook 2024

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- IEA
- IEA WEO 2024
- IEA WEO
- WEO BAU STEPS
- 6 2 80% BAU STEPS WEO

IEA 1.5 2050

2021 2050 IEA

IEA



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2016 IEA

2030 IEA

10 20 IEA

12 IEA

IEA



- 2020 IEA
- IEA
- 2024 2030 IEA
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2002 2006 IEA 30 4 IEA

IEA??
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 Target??OB????IEA????????????????????
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?? ?? · Monday, February 3rd, 2025

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wildpixel/iStock

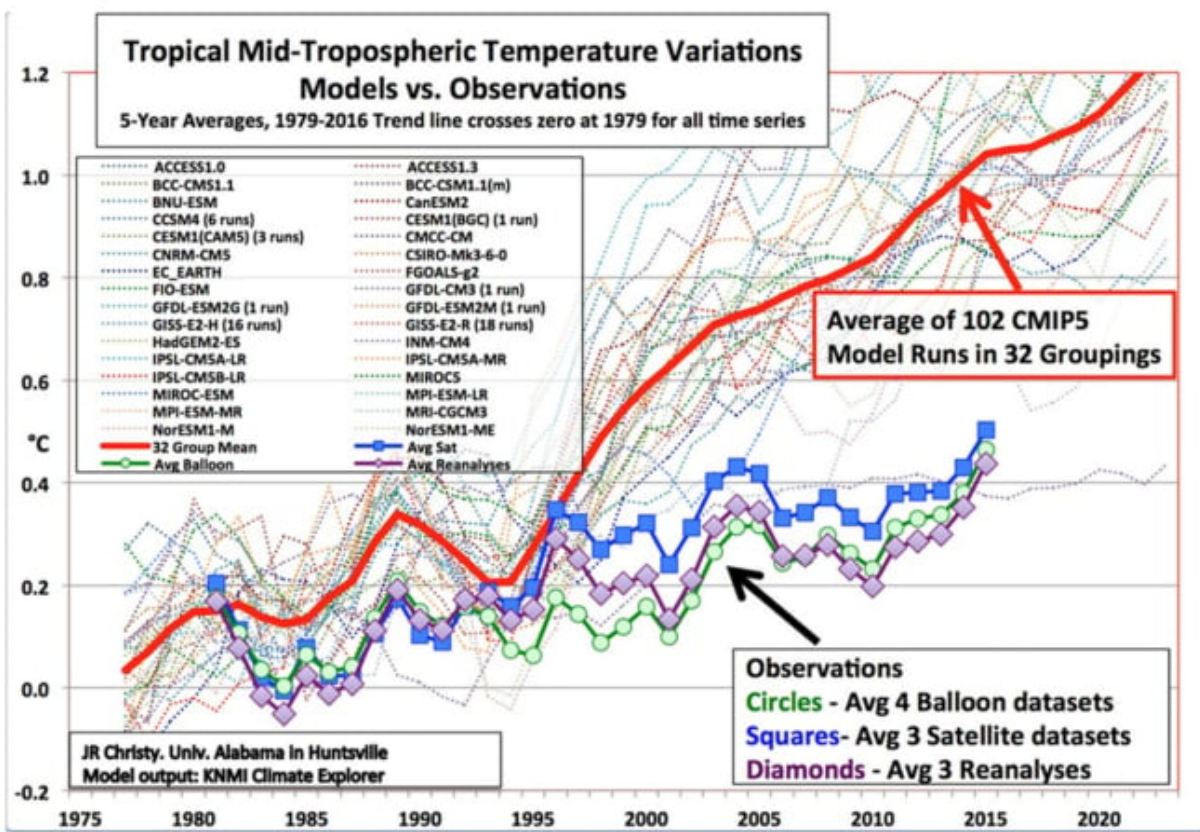
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 free????????”??

CO2 2016 IPCC

CO2

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• 2022
• CO2
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??Happer-Lindzen-EPA-Power-Plants-2023-07-19.pdf

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??EV?ESG??DEI?SDGs????????

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Posted in ??????????, ??, ???? | No Comments »

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?? ?? · Sunday, February 2nd, 2025



Olga Rakovets/iStock

1996????????????????????2005????????????????????CDM????????????????????????????????30????????
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??10????????DOJ????????
?FBI????????????????????SEC????????????????CFTC????????????????

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??DOJ?CFTC????????

U.S. Attorney Announces Criminal Charges In Multi-Year Fraud Scheme In The Market For Carbon Credits

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 ???CQC Impact
 Investors LLC????CQC????????????????????????????????????1????????????????????

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??2021?8????CQC????

??CQC????????????????????????????????
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CFTC Charges Former CEO of Carbon Credit Project Developer with Fraud Involving Voluntary Carbon Credits

????????????CFTC????????????D.C.??CEO????????????
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???2023?5???Verra?CEO?15?????David
Antonioli????????????????????????Verra????????????????????CO2????????????????????????????????

CEO????????????????????????????????Verra??Verra????
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Posted in ????????????, ???, ??? | No Comments »

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?? ??? ?? · Thursday, January 30th, 2025



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2024年12月11日 15:18:03 5:33:28

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CO2 CO2

2.5 CO2

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1,500/2.5 CO2 “” 16.7 2022 CO2 5,945 2,541 2.5 16.7 0.28% 0.67 %

2000 4.4% 4.4% 4.7% CO2

X



CO2 pic.twitter.com/o5CKmK4xtS

— (uedareiko) January 22, 2025

2.5

2.5

90 2024 5 16

(tokyo.lg.jp)



J- J-



Carlos Pascual/iStock

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Posted in ???, ?????? | No Comments »

????????”Back to the Future”

?? ?? · Saturday, January 25th, 2025



The White House ??

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The golden age of America begins right now. From this day forward, our country will flourish and be respected again all over the world.

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gyro/iStock

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Scharfsinn86/iStock

Hydrogen production costs

Hydrogen production costs are expected to decrease significantly over the next decade, driven by economies of scale and technological advancements. The current cost of hydrogen is approximately 4.5-6.0 \$/kg, but it is projected to drop to 1.0-2.0 \$/kg by 2030.

Hydrogen production capacity

Global hydrogen production capacity is expected to reach 100 million tonnes per year by 2030, up from 10 million tonnes per year in 2020. This growth is primarily driven by the expansion of natural gas steam methane reforming (SMR) and electrolysis.

By 2030, the global hydrogen production capacity is projected to reach 100 million tonnes per year. This includes 2028 capacity of 200MW and 2031 capacity of 9500. The total capacity is expected to reach 100 million tonnes per year.

The total capacity is expected to reach 100 million tonnes per year.

Hydrogen production routes

Hydrogen production routes are categorized into fossil-based and renewable-based. Fossil-based routes include steam methane reforming (SMR) and coal gasification. Renewable-based routes include electrolysis and biomass gasification.

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Hydrogen production routes are categorized into fossil-based and renewable-based.

Hydrogen production routes are categorized into fossil-based and renewable-based.

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