Global Energy Policy Research | GEPR

GEPR??http://agorajp.com/??

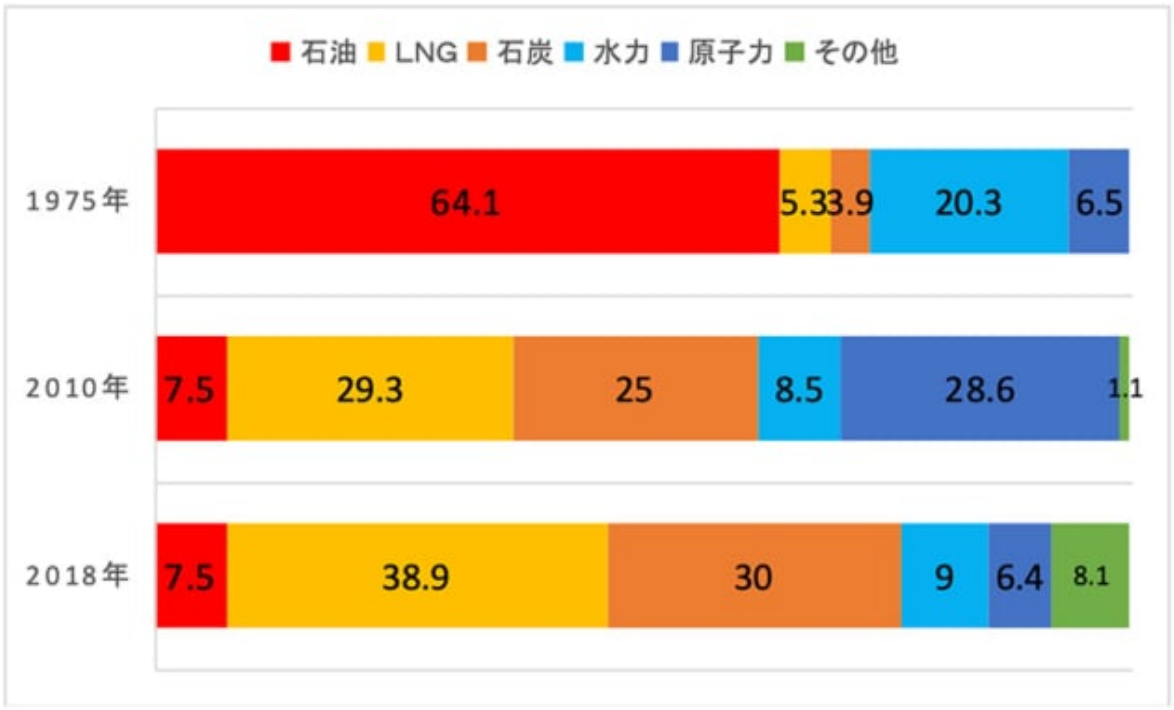
???????????????

??? ?? · Saturday, March 29th, 2025

wen ya/iStock

70????????????????????????????

?1??????????????????????????????????????1975????70??64?????????70??



?1 ??????????????????
???????????

??????????????????2????????1???????????????????1????????LNG?????????????????

???????????2010?????????????????????????????28.6??LNG29.3????25.0????????30?????????????????
????????????7.5%???????

??
?????????????

?????2018??28.6%?6.4%???????????
??????????????????LNG29.3%?38.9%???25%?30%?????LNG???????????????????

??????????????????

????????LNG????????????

??????????????????KWh??

??

??
??????

??????????????????CO2??3?????????UFJ????????
??
????????????????????????????????????

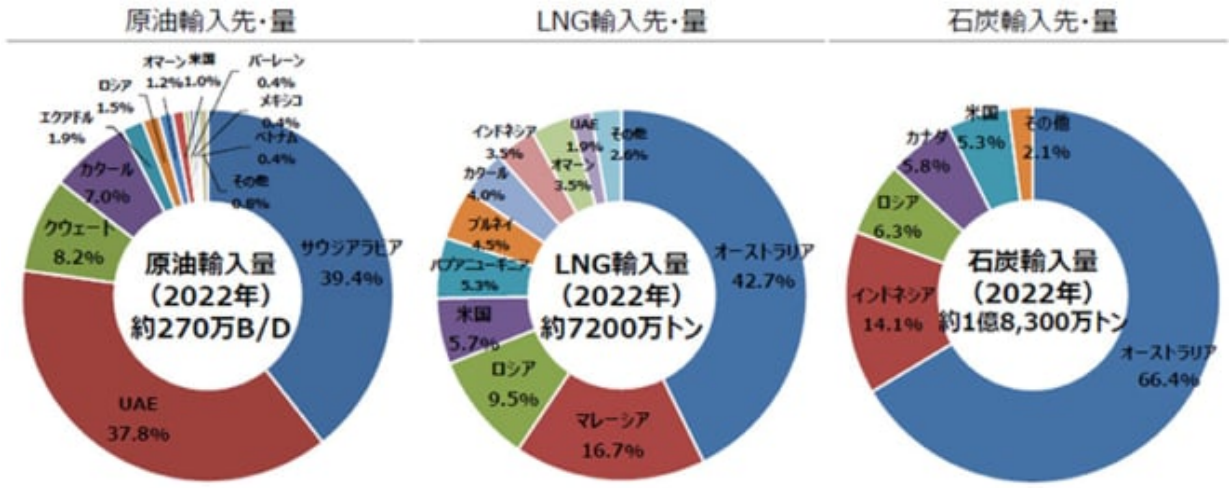
?7?????????????2040???????3?5??LNG???????????

??1975??64?????????????LNG??????????????????????????????????????1970??????????????????????

???????????

??????????????????LNG??????????????????????????????????LNG??????????????????????????????????????
?

??2030????80%
??



?2????????
?????????

??????????????C?????

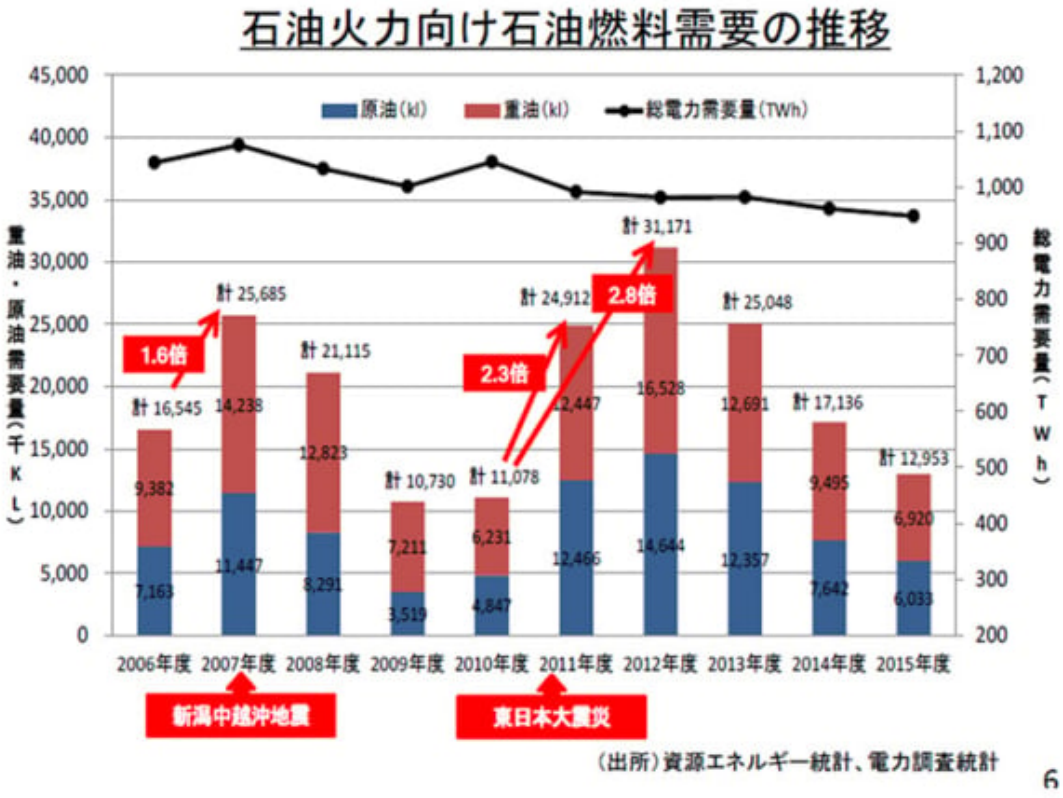
????????????????????????????????C????????????????????????????C??????????????????????
??????

??
??

??????C????????????????????????C??C??????????????????
??

??????????????????????????250??C??????????????????????
??

?????LNG????????30????????????????????????????7????????????????????????


石油火力向け石油燃料需要の推移
原油(kl)
重油(kl)
総電力需要量(TWh)
重油・原油需要量(千kL)
総電力需要量(TWh)
1.6倍
2.3倍
2.8倍
計 16,545
計 25,685
計 21,115
計 10,730
計 11,078
計 24,912
計 31,171
計 25,048
計 17,136
計 12,953
9,382
14,238
12,823
7,211
6,231
12,447
16,528
12,691
9,495
6,920
7,163
11,447
8,291
3,519
4,847
12,466
14,644
12,357
7,642
6,033
2006年度
2007年度
2008年度
2009年度
2010年度
2011年度
2012年度
2013年度
2014年度
2015年度
新潟中越沖地震
東日本大震災
(出所)資源エネルギー統計、電力調査統計
6

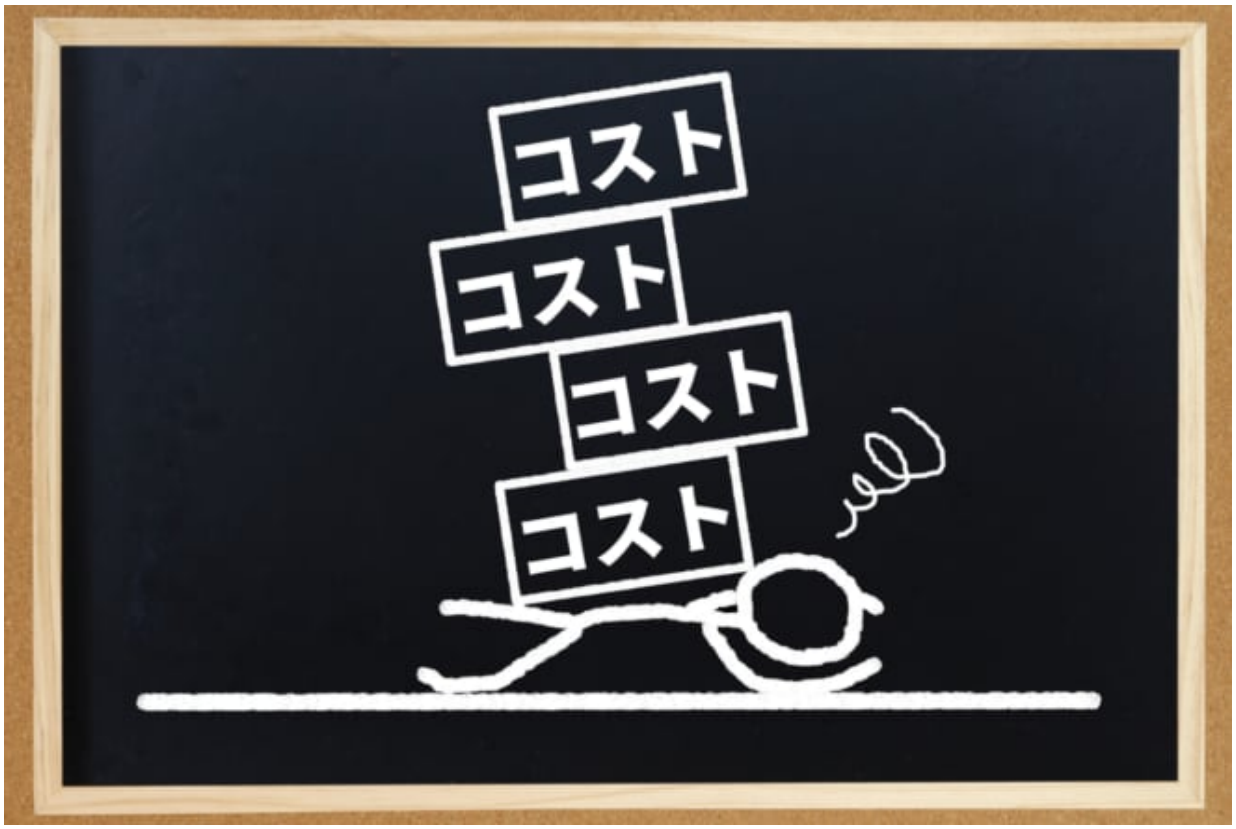
?3??????????????

?3????????????

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

GX????????????????????????????

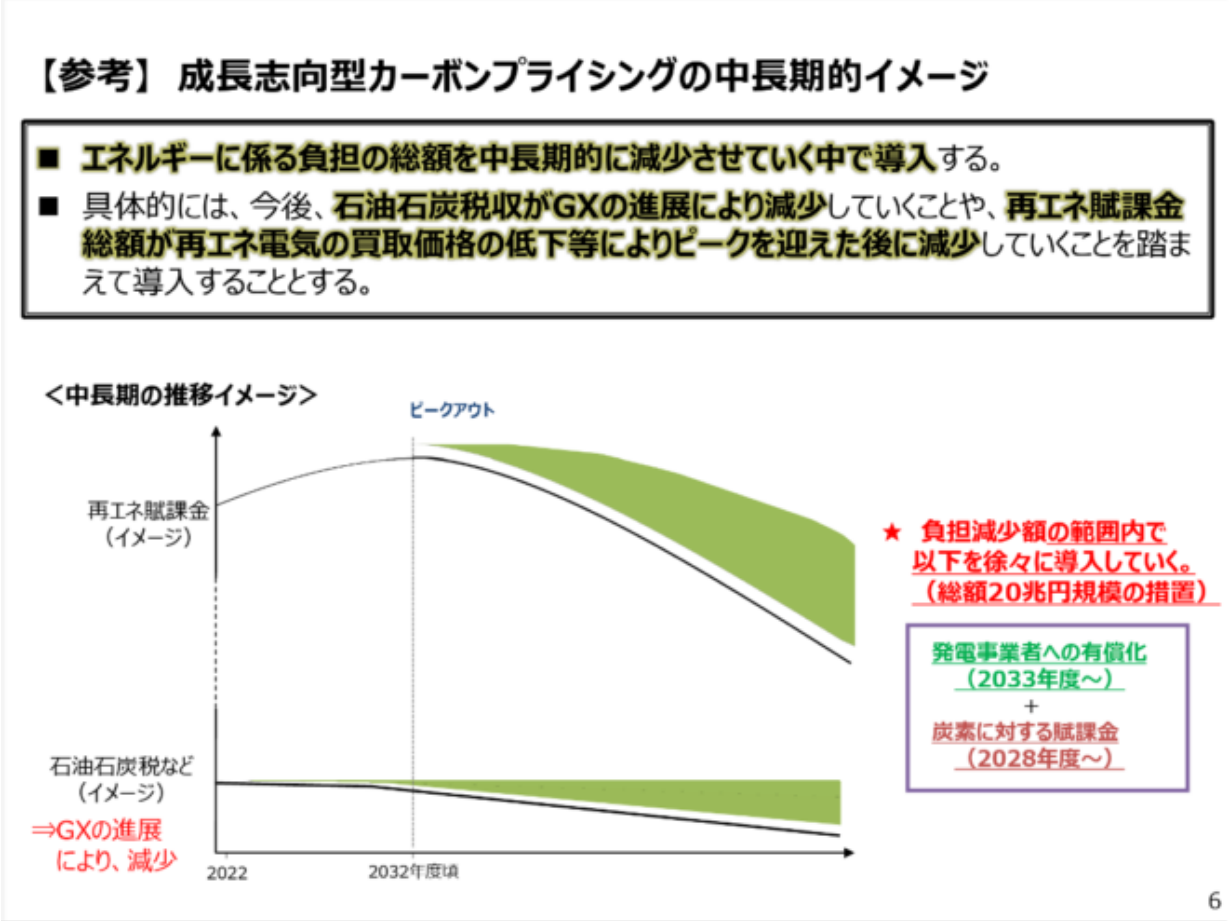
?? ?? · Friday, March 28th, 2025



BBuilder/iStock

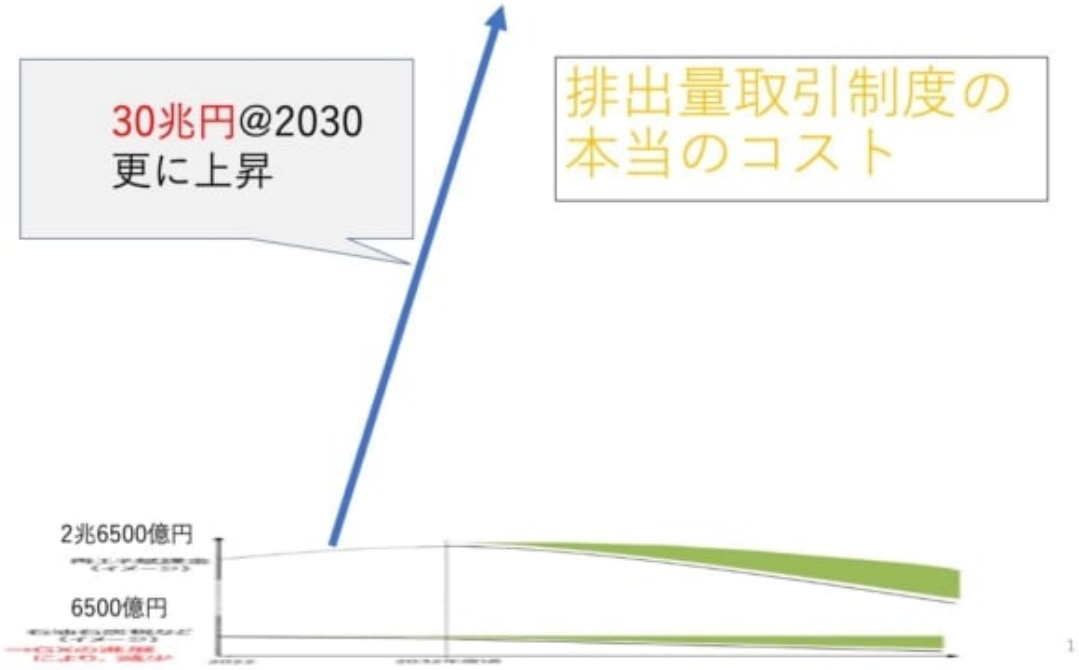
GX???

??
??1??


【参考】 成長志向型カーボンプライシングの中長期的イメージ
■ エネルギーに係る負担の総額を中長期的に減少させていく中で導入する。
■ 具体的には、今後、石油石炭税収がGXの進展により減少していくことや、再エネ賦課金総額が再エネ電気の買取価格の低下等によりピークを迎えた後に減少していくことを踏まえて導入することとする。
<中長期の推移イメージ>
ピークアウト
再エネ賦課金（イメージ）
石油石炭税など（イメージ）
⇒GXの進展により、減少
2022
2032年度頃
★ 負担減少額の範囲内で以下を徐々に導入していく。（総額20兆円規模の措置）
発電事業者への有償化（2033年度～）
+
炭素に対する賦課金（2028年度～）
6

?1?????????????????????????????p6

????????????????????????????



?2???????????????

???????????2?6500?????????6500????????????????????????????????20????????????????????????????
2030????????30?????????

30??????????20???1.5?????????????

?????30????????GX??GX????????????????????????
??????????????????30????????????????????????????????????

??

??????2?2030??????2035??2040?????????????????????

????????????

- ??????????????????????????
- ??
- ??????????????????????????

?????GX??????????????????GX??

?

?????????????????????? ???

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

??????EV?????????

?? ?? · Thursday, March 27th, 2025

Marcus Lindstrom/iStock

??????????EV??????????????????????????????????????

?????????ACEA?????????2024?8?????????EV???????????70?????2?7024???????????EU???EV??
??????????????????????????33???1?3143??????????EU?????EV????????????????????????

???????????????ACEA???
??EU????????????????????????????????????VW??BMW??
?????????

???????????EV??Northvolt?????????????Ett????????
???????????????????1600??

Northvolt axes 1600 jobs as EV slowdown bites

???????EV???????????????????EV??60??
?35??????????????????????????????

??????????????????EV???????ICE???1??????190??
????

??2030???2035???5????????????EV
?????????????EV???????????????????

??EV????????????????????????
????????????????????????????????????

??????????????????????QBE????????????????????????????????????2023??????46????????????????
?????EV??EV??????????????????????

UK fire services face 46% increase in fires linked to lithium-ion batteries

????????????EV??
??????EV??

?????????

- 2024?8??EV???????????70????????33???
- ACEA?????????EU???????????????????
- ???????????????1600???????
- ??????EV??????????????????????
- ????????????????????????
- ??EV????????????????????????
- ????EV???????????46????
- ???EV?????????????????????????????

?????????EV??????????

1. **???????????**
   ?????????EV??
2. **???????????**
   EV?????????????????????e-fuel??
3. **????????????????????**
   ?????????????EV??

4. **??????????????????**
   EV??

????????????????????????????????EV????????????????????????????????????

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

??????????????MAGA??“MEGA”?

?? ?? · Wednesday, March 26th, 2025

Evgeny Gromov/iStock

3?10????????????????????????????????????2.0???????50??
??

??????????????????????????????????????Global Energy Institute??????????????2.0??
???CERAWeek?S&P Global?????????????????????????

????????????????????????????????

CERAWeek????“MEGA”???

??80????2050???1??10???????BlackRock?????????CEO??CERAWeek?????S&P Global???

??????????????

??????????????

??????????????????

> ??
> ??
> ??????????????????????????1????????????4???

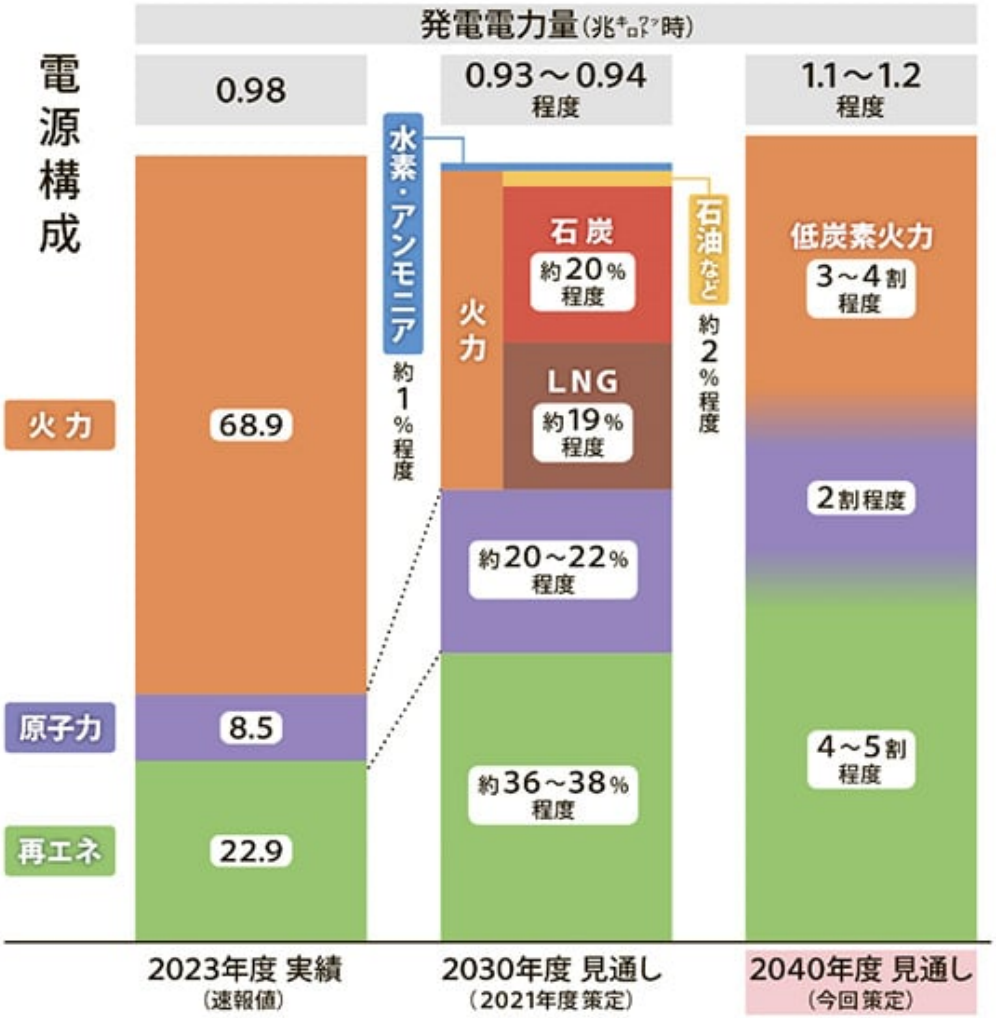
????????

??????????????????????????????????

- ??????????2035??????????????????2038??????
- ???????????????2024????????2029?????
- ??????????2028?????????2038??????????
- ???????????????????????
- ???????????????????2028???????2034?????

??4?????????

??????????????????????????????????????1?????7???????????????2040????????????????????????????
?22%??40?50%??????????????69%??30?40%????????????????????????????CO2?????????????
??????????????



?1??????????????7???????????

??

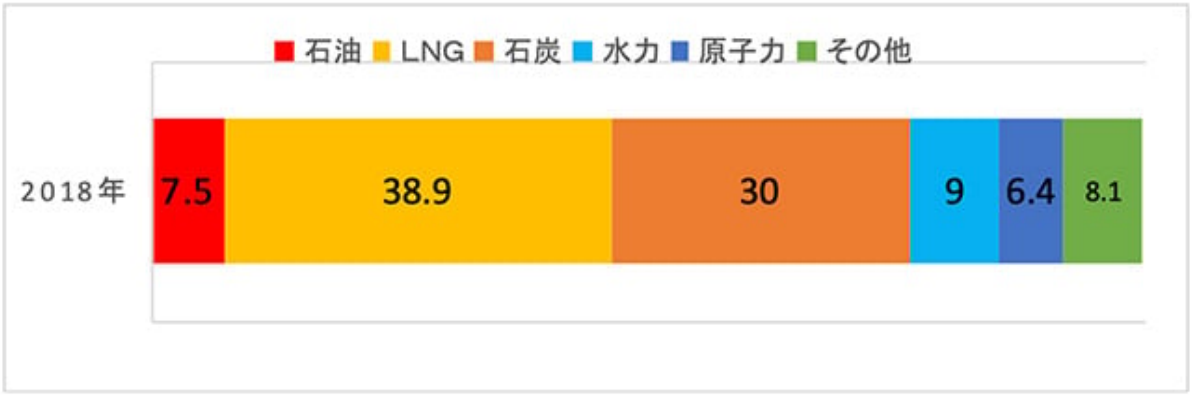
????????????1?? ???? ???“????”

????????????????????????????????????

????????LNG???????

?2?2018??????????????????????LNG?39%???????????????30%???9%????????

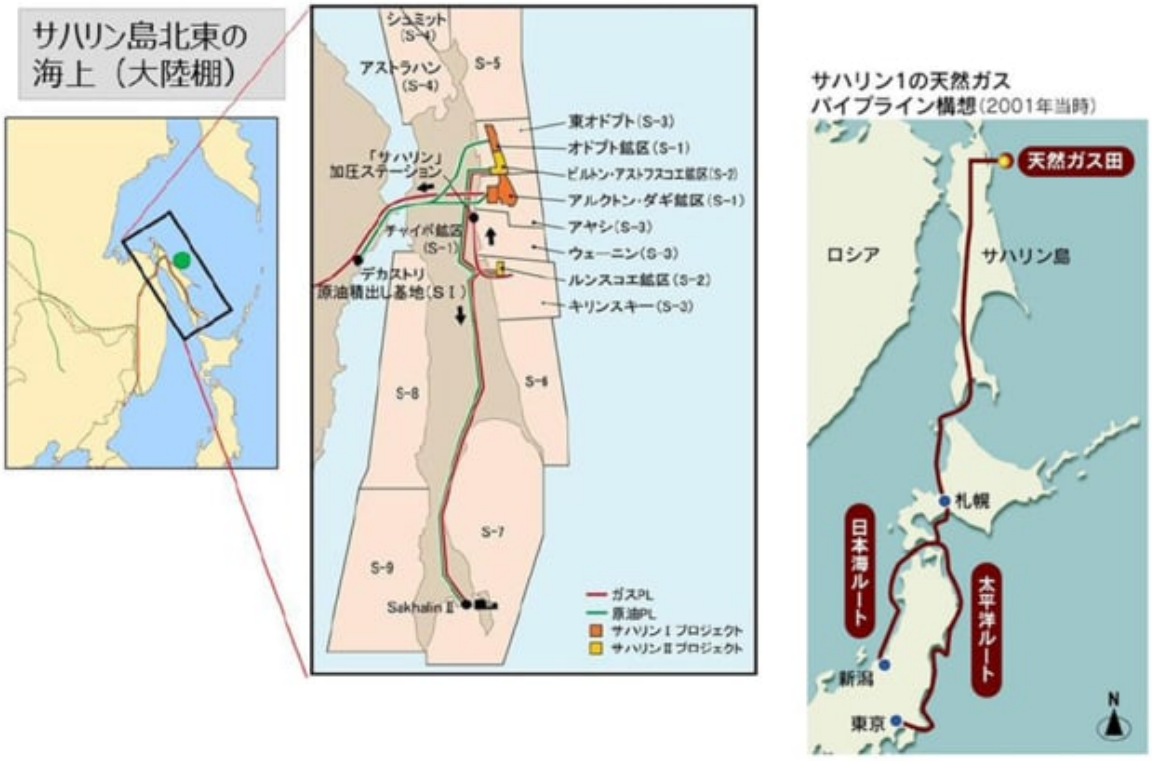
????LNG??????????CO_2??LNG?????????????????????



??2018?????????????

LNG????

LNG?????3?????????10%????????????????????????????????????LNG???????????????3?????
??????????????????????????



????????????????????????

??????????3,000km?????????????????????3000km??????????LNG????????????????????????
??LNG?????????????

??JERA?
??????????????????????????LNG???????????????LNG?????????????????????

????LNG?????????????????????LNG?????????????????????????????250??????????????LNG?
??LNG???????????????????

LNG??LNG???????????LNG????????
???**????2???**?????????

??????????????10%????????10%??
????????????????????LNG?????????????

????????????????????????????????2?3??????????????LNG??????????????????????

??????????????????????????

??????????????????????????30????????????????????????????????LNG????????????????????
??

??20%?????????????
??????????????????????LNG???

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

??????????????????????????????

?? ?? · Thursday, March 20th, 2025

ConservativeHome??

??

Kemi Badenoch: Net zero by 2050 “is fantasy politics. Built on nothing. Promising the earth. And costing it too.”

> Kemi Badenoch: Net zero by 2050 “is fantasy politics. Built on nothing. Promising the earth. And costing it too.”

????????????

????????????????

???????????2050??CO2??????????????????fantasy??Net Zero Sceptic??CO2??????????????????

??

??????????????????????????AfD??2??

????????????????????????????????????AfD??

??

??

?

????????????????????? ???

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

GPIF??????????????????????????

?? ?? · Thursday, March 20th, 2025

tommy/iStock

GPIF???????????????ESG?????????????????

> ???????????????GPIF???ESG??????????????????????????

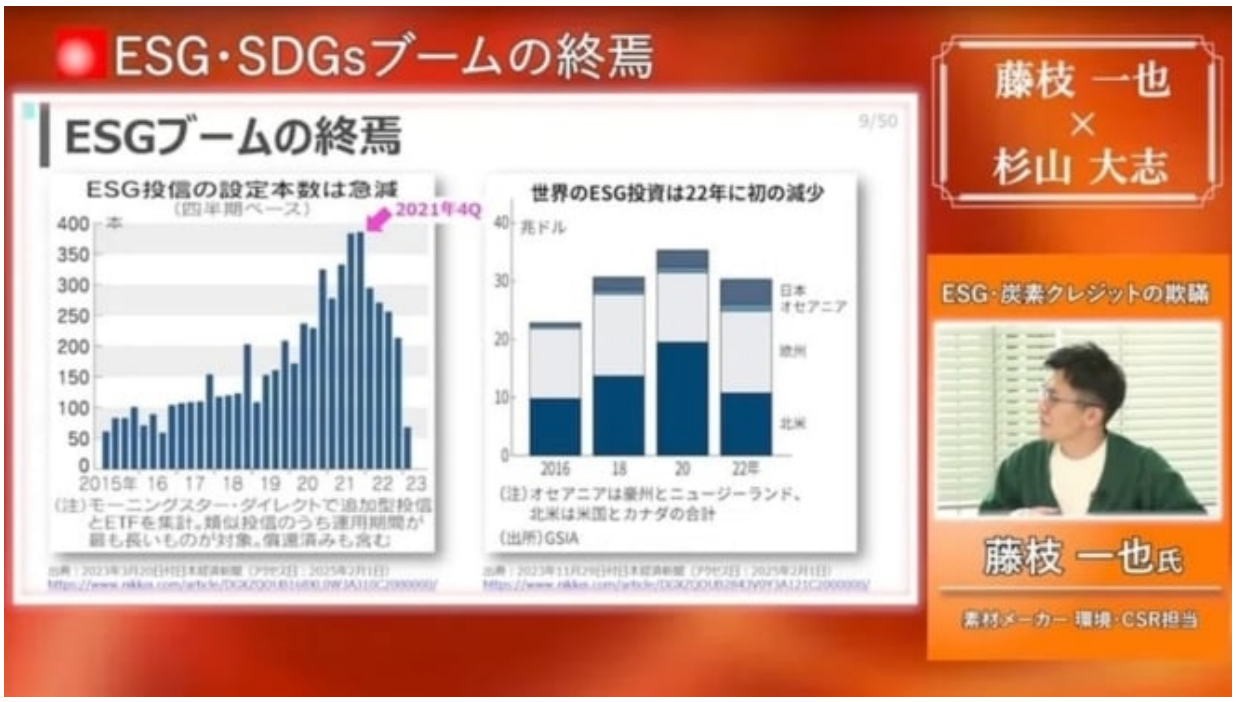
> ?????????????GPIF?2015???????????PRI?????????ESG??????????????24????????????????124????????14??ESG???????????

> ????????ESG????????????????????????????????ESG??

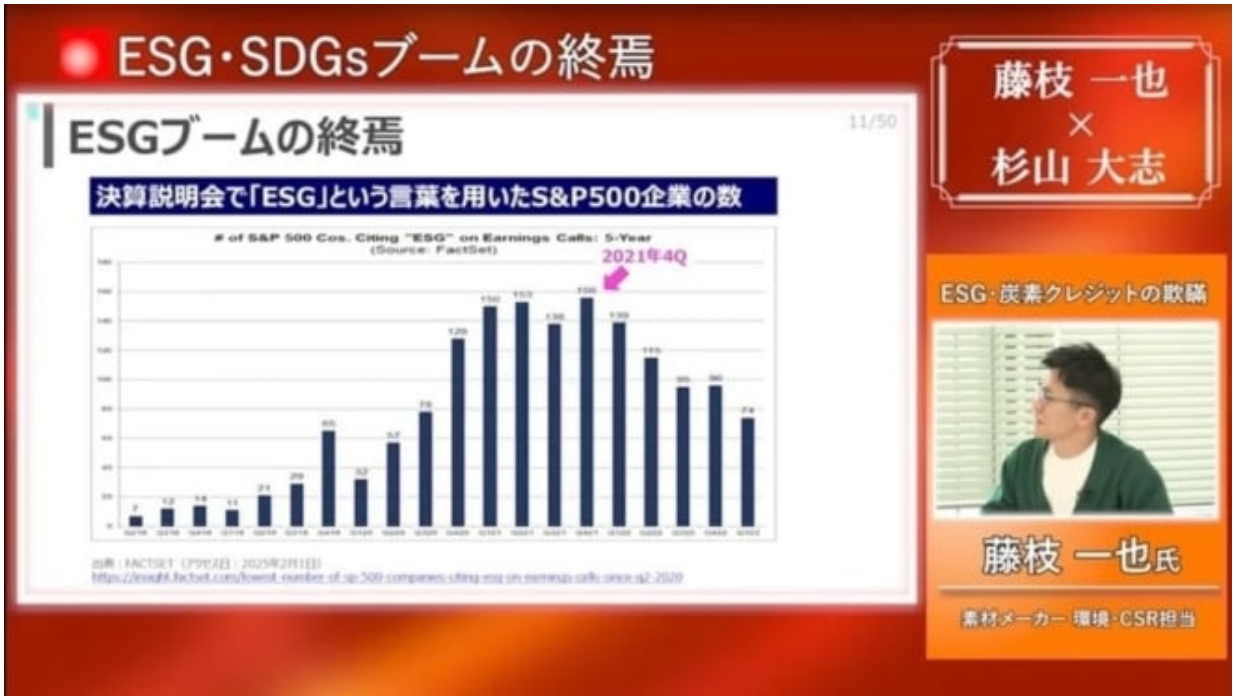
GPIF???ESG???

???????????????ESG????????????????????????????????????ESG??????????????????????????

ESG??????????????????????????


ESG・SDGsブームの終焉
ESGブームの終焉
9/50
ESG投信の設定本数は急減
（四半期ベース）
本
2021年4Q
400
350
300
250
200
150
100
50
0
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
世界のESG投資は22年に初の減少
兆ドル
40
30
20
10
0
2016 18 20 22年
日本
オセアニア
欧州
北米
（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
藤枝 一也
×
杉山 大志
ESG・炭素クレジットの欺瞞
藤枝 一也氏
素材メーカー 環境・CSR担当

ESG・SDGsブームの終焉
ESGブームの終焉
10/50
米国サステナブルファンドの資金流出入(2024年第3四半期)
Exhibit 1 US Fund Flows: ESG Vs. All US Funds (USD Billion)
Sustainable Fund Flows
Sustainable Funds QGR
All U.S. Funds QGR
USD Billions
2021年4Q
15
10
5
0
-5
-10
12%
9%
6%
3%
0%
-3%
-6%
Q4 Q1 Q2 Q3 Q4 Q1 Q2 Q3 Q4 Q1 Q2 Q3
2022
2023
2024
藤枝 一也
×
杉山 大志
ESG・炭素クレジットの欺瞞
藤枝 一也氏
素材メーカー 環境・CSR担当



????????????ESG???????????????????

???UFJ????????????????????????????????????NZBA??????????????????????????????

ESG???

GPIF???

?

?SDGs?????????

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

??????????????????

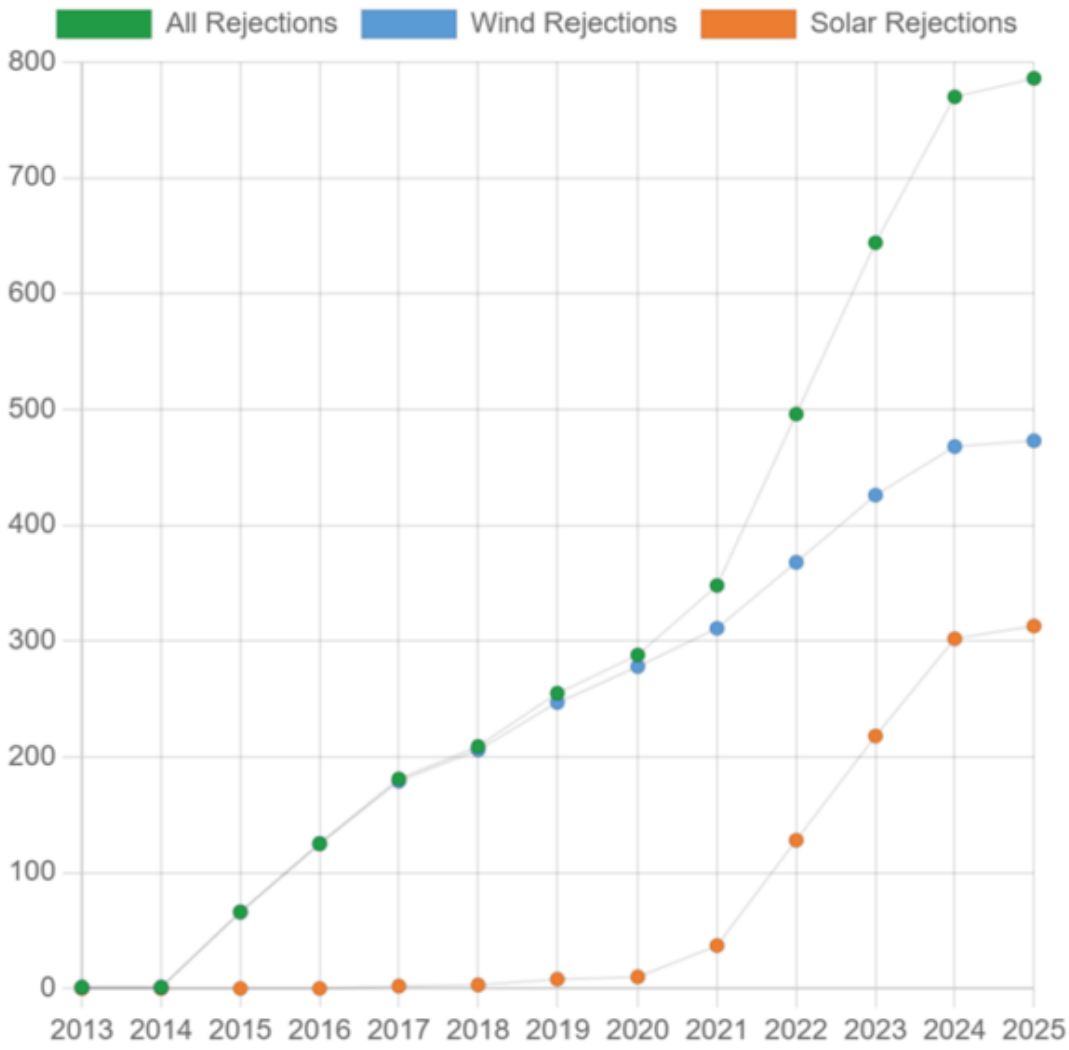
?? ?? · Wednesday, March 19th, 2025

yangphoto/iStock

??Renewable Rejection

Database??????????????????????

Renewable Rejection Database



????????????????????

??

?

?????????????????????? ???

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

??????????????????????????????

?? ??? ?? · Saturday, March 15th, 2025

bilalulker/iStock

??

??
??

?????????????????EU???

??EU????????????????????7????????????????????????????
???3????????????????????????????3????????????????????????????5????????????????????????????????

??NATO????????????????????????????????

??EU????????????????????????????????EU????????????????
????????????????????????????EU????????????????????????????

??28??

??????????????????

??

??
??

??
??
??
?????????

???????SNS??

? ? ? ? ? ? ? ? ? ? ? ? ? ?
??
?????

??
??????????????40??

??2??
?????

??????????????????????????10??3??????????????????????????
??

??40???????????????????

EU???????????????????

??
??

??EU????????8??
??

???EU???????????????????????????????

?????22?2??
??????????????????3????????????????????EU????????????????????????????????

??
??

??EU????????????????????
??????????????????

??

??????????????????

??EU????????????
??????????????????????EU??

??????????????????????????????????????EU??

??4??????????EU??????????????????????????????????NATO??????????????????????????????????8000????
??3?7???????????????????

??10????????????????????????????????????
??????????????????????EV??

??

Posted in ???, ????? | No Comments »

??????????????????????????????????

??? ?? · Monday, March 10th, 2025

fokkebok/iStock

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

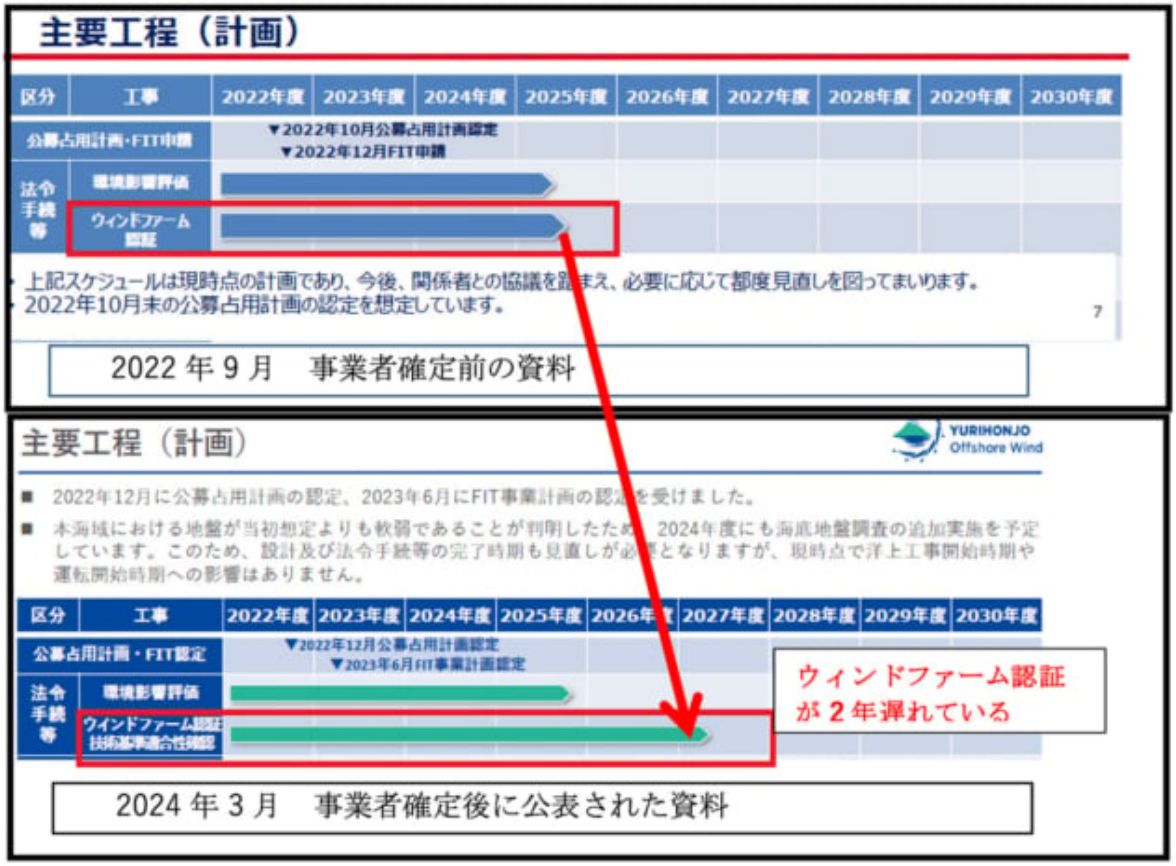
2021?????????????????1??????????1?????3??
??

????4??
??????

??

2. ???????????????

??



?1????????????????????????????
????????????????????????????

?1??????1??2022?9???????????1????2024?3????????????????
?????????????

??
??????????3?????????

?1???????????2025????????????????????????????2????2027???????????

??2027??????????????????2024?3????????????????????????????????

????????????????????2030?12????????????????????????????????????1????????????????????????????????????
??

??
??????????????????????????????????????

??
????????

3. ??????????????????????

???6?????????????2040?????????????5.7GW???????????1?3?????4.6GW?????????????4????????
??1?1.7GW??????????????????????2.9GW???????????

	ラウンド1	ラウンド2	ラウンド3	ラウンド4	合計
想定容量	1.7GW→0	1.8GW	1.1GW	?	4.6→2.9GW

?1????????????????????????

????????1.7GW??????????????????306????????????????????????????????????306??????????????????
??

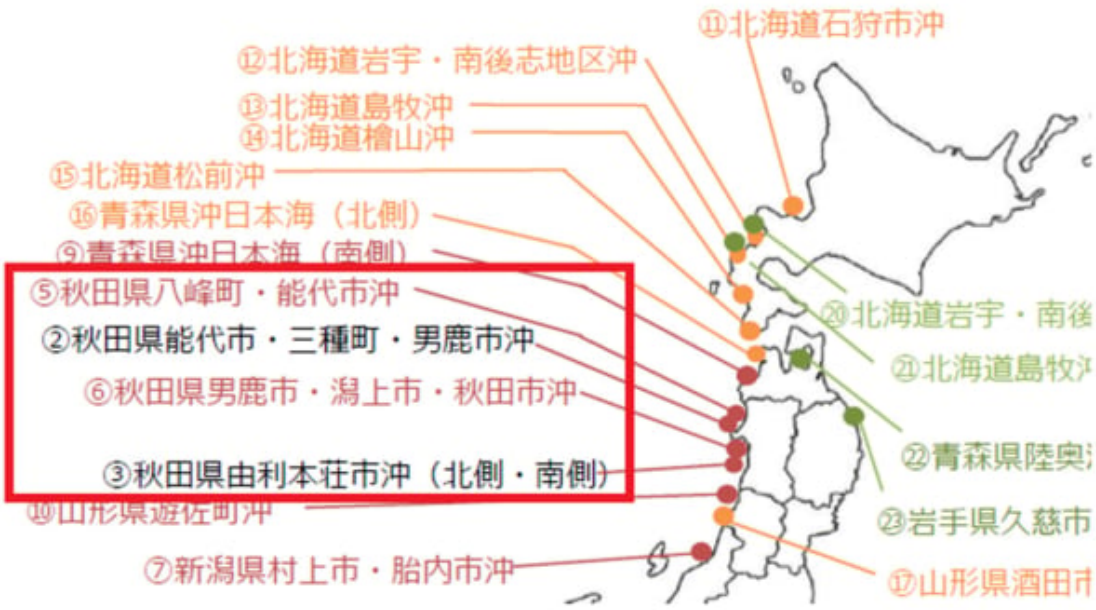
??

??SDGs??????????????????
??

??????????????????10??20??
????????????????????????

4. ??????????????????????

??85??
??????????????2025?2?22??



?2????????????
????????????

??

?????2??4????????????????????????????
??

??
??

????????

5. ??????????????????????????

??
?????40%??

????????????????????????????? ??

??
??????????????????????????

??
?20???40??

???JR???????????????NHK??
??
????????????????????????????

??

??——????????10????????????????????????????????
??

??
??????

??
??????????????????????????

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

????????????????

?? ? · Friday, March 7th, 2025

Evgeny Gromov/iStock

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

??????AfD??????????????????????????10.4??20.8???????????????FDP????????BSW??????????????
??????????5????????????????????

CDU/CSU??AfD????????????????????????
???????????????SPD??????????SPD???????????????

?????SPD??EU????????????????????????????
??4????????????????????

????????????????????????????????????

- **CDU/CSU?**??
- **AfD?**????????????????????????????
- **SPD?**?? ????????????????????????????????
- **????**2030?????????????????????

??
????????????????

?????????2045????????????????????????????2030????65??
??

??

??SPD??????????????????????CDU/CSU??

??3??

??CDU/CSU??????????????????????????????

????????????????????CDU/CSU?2035??????????????????????????EU???????????SPD??

??????????????2038??

????????????????????????????????CDU/CSU?2024?4????????3??

??????????????????SPD??????????????????CDU/CSU?????AfD??????????????????????AfD??

??CSD/CSU?SPD??AfD??????????????????????AfD??????????????????????

????????????????????????????????????

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

????FG??????????????????????????

?? ?? · Friday, March 7th, 2025

????FG??????????????????

> ????????????????FG??????????????????????????????4????????????????HD?????
> ??
> ?
>
> ??????2050??NZBA???4????4
> 4??????135??????????????FG??
>
> ?????????????2024????25?????????????NZBA???????????JP????????????????????
> ????6??1?????????
>
> ????????????????????????????????NZBA??
> ????????????????????????????

????FG????????

??

55?00??58?10??

> ????FG??????????????????????????30????????????????????????????????50?????
> ??

??????????????

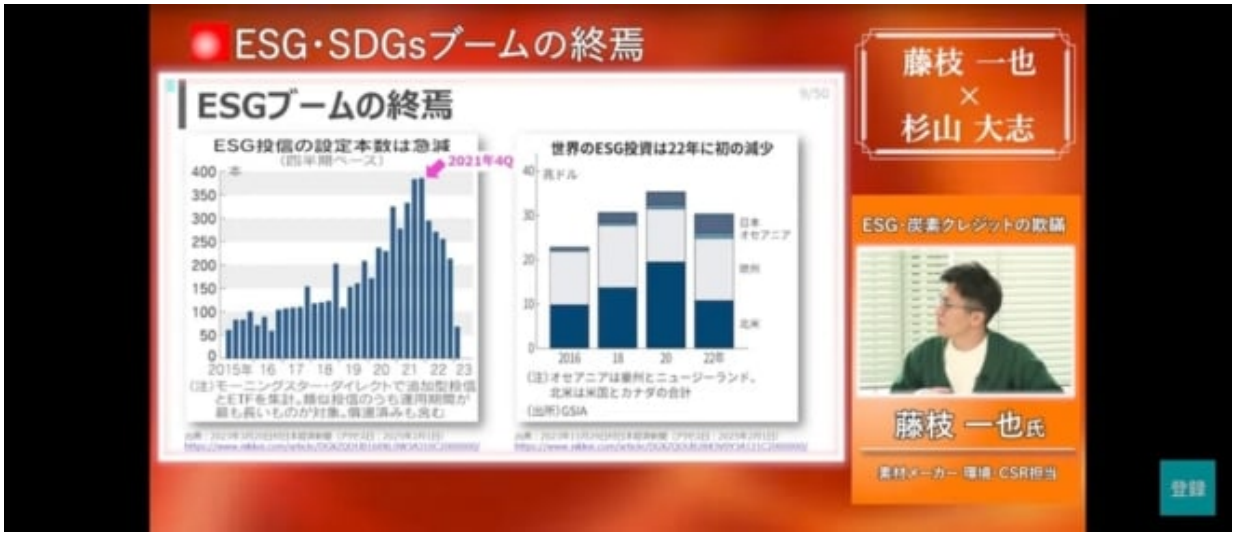
?????CO2??
??????????

???????????????TCFD?SBTi??
??????????

?????????ESG??
?????????

??????

??????????????????????ESG????????????



ESG・SDGsブームの終焉
ESGブームの終焉
11/50
決算説明会で「ESG」という言葉を用いたS&P500企業の数
2021年4Q
藤枝 一也
×
杉山 大志
ESG・炭素クレジットの欺瞞
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（気候カルテル崩壊中）
14/50
Trillion-dollar US asset manager exits NZAM and Climate Action 100+
日本経済新聞
CA100+、GFANZ、NZAM、NZBA、NZIA、NZAOA、…
藤枝 一也
×
杉山 大志
ESG・炭素クレジットの欺瞞
藤枝 一也氏
素材メーカー 環境・CSR担当
登録

??ESG??????????????????

??

2024??????????????????

?

SDGsエコバブルの終焉
編著＝杉山大志
著＝川口マーン惠美＋
掛谷英紀＋有馬純ほか
「脱炭素」幻想は崩壊
なぜ日本だけが
「再エネ」を続けるのか
クリーン投資補助
太陽光パネル
偏向報道
気候科学の嘘
中国と安全保障の危機
EV開発加速
宝島社

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

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

?? ?? · Thursday, March 6th, 2025

Tony Studio/iStock

??

??

??????????????????

????DOGE??????????????????????????????????

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割高
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

??????????50??/?????????

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

4. ??AI?????

- ?????50??????????????????
- ??
- ??????????????????????????
- ???????????????????????
- ????????????????????????????????
- ??
- ???1????????????2??????????????????
- ???????????????????????
- ??????????????????????????????????????
- ???????????????????????

??????AI??

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

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

?? ?? · Tuesday, March 4th, 2025

2022?11??ChatGPT????????2????????????AI???????????????AI?????Microsoft?Google?Amazon?Meta????????????2022?2023????????????????????????????????

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

????????????????????

hirun/iStock

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

????? ????????????????????????2050?????150??

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

?????15?20??/???????????2050????????150?200????

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

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

- ?????CO2?????10???
- ?????CO2?????100???
- ?????CO2?????400???

???????CO2???????????1?????CO2????????????????????????????????????

- ??????????????????????
- ??
- ??

3. ??????????????

??????????????15?20??????????????????

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

??20????????????????????????????

4. ?????????

1?????????????

- ?????????15????????????????????
- EV????????????????????
- CO2????????????????????

2??????????

- ????5%????????
- ????????????????????????????

3?????????????

- ??????????????????????
- ??????????????????????

5. ????????????????????

????????????????????????????????????

- ????????????????????????????
- ??????????????????CO??????
- ????????????????????????????????????

???????????????????? ????????????????????????????????????

6. ?????AI?????

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

????????????????????????????????????

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

??????????????????????????

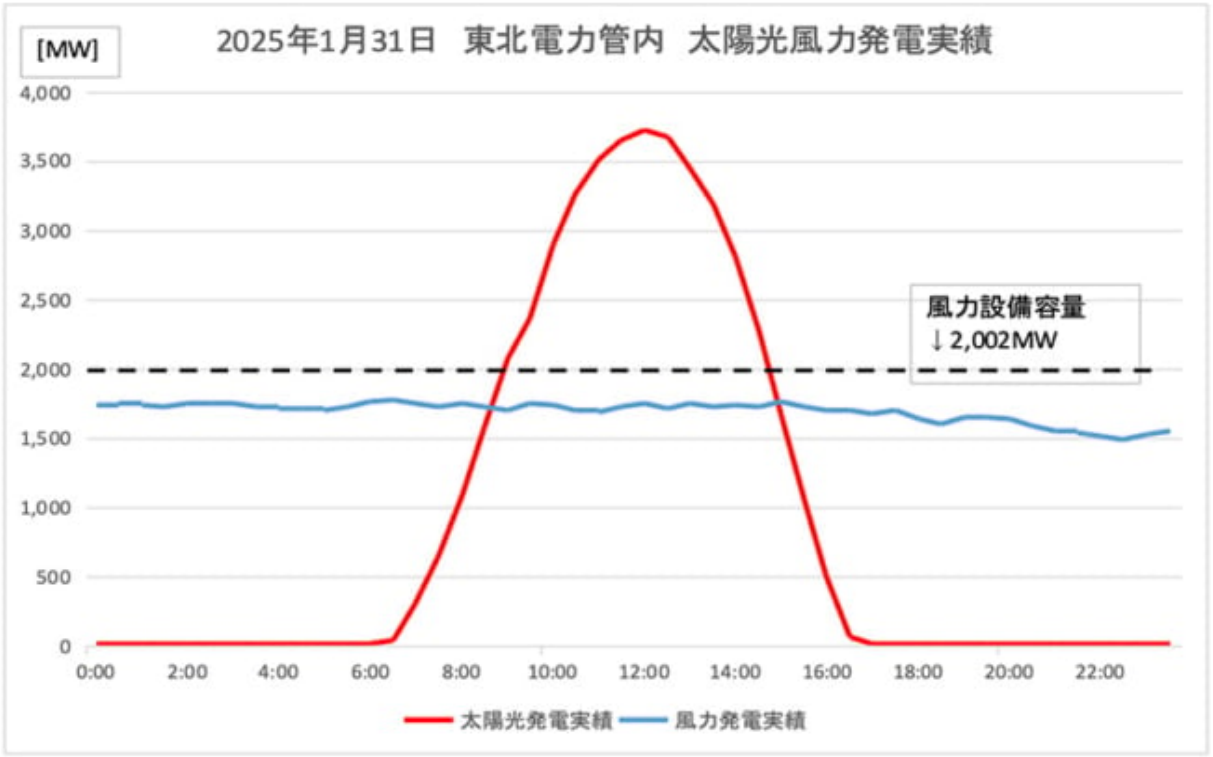
??? ?? · Monday, March 3rd, 2025

BirgerNiss/iStock

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

?1???????????2025?1?31????????????????????30??????????24??????????MW????????????????????????
??????????????????????????????????1????????????

??16:00???????6:00??????
????????????????????????????



?1??????????????????????2025?1?31??

??1?????????????1????1??????????????????
??????????????????????????84%????????????????????????????????

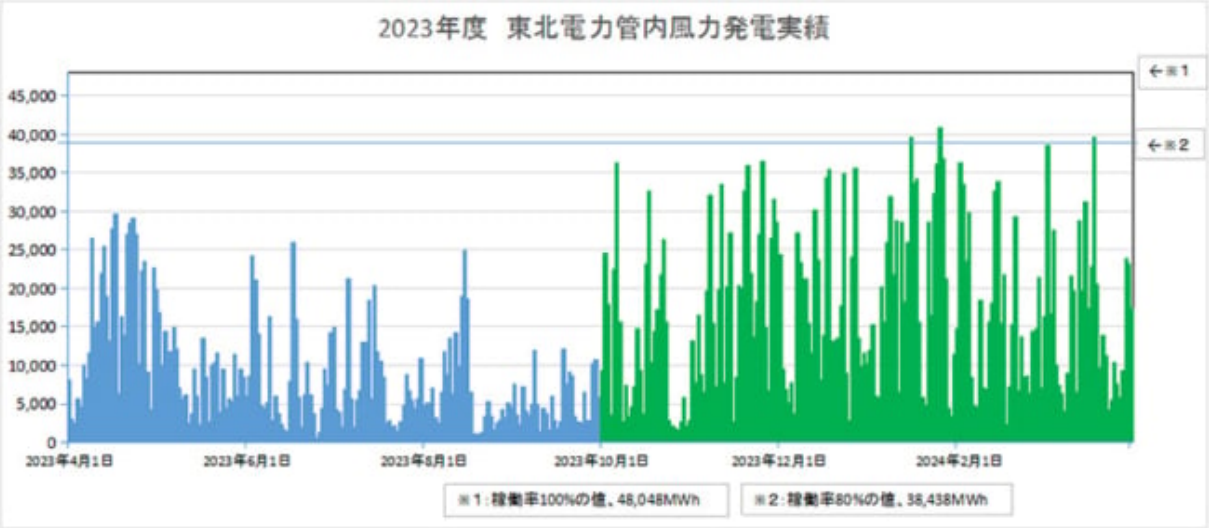
??
??

??????????1????????????????????

2. ??????????????????

?????2????????????????????????????1?????????1???????MWh?2023???????????????

?????????100%???????1???80%???????2???????80%??????4????????????????????4??10??????????
??????????



?2??????????????????????2023???

????????10??3??35%????????????????????84
????????????4??9??????18%????????26%???????????????1/4????????

?1????????????1????????MWh????????2,002MW?×24???48,048MWh?????100??????????

3. ??????????????????????

??28%?????????39.3%????????

??
??

???26?????26%??2????0?80%????????????????????
??

??
??

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

?????????????2024?????????

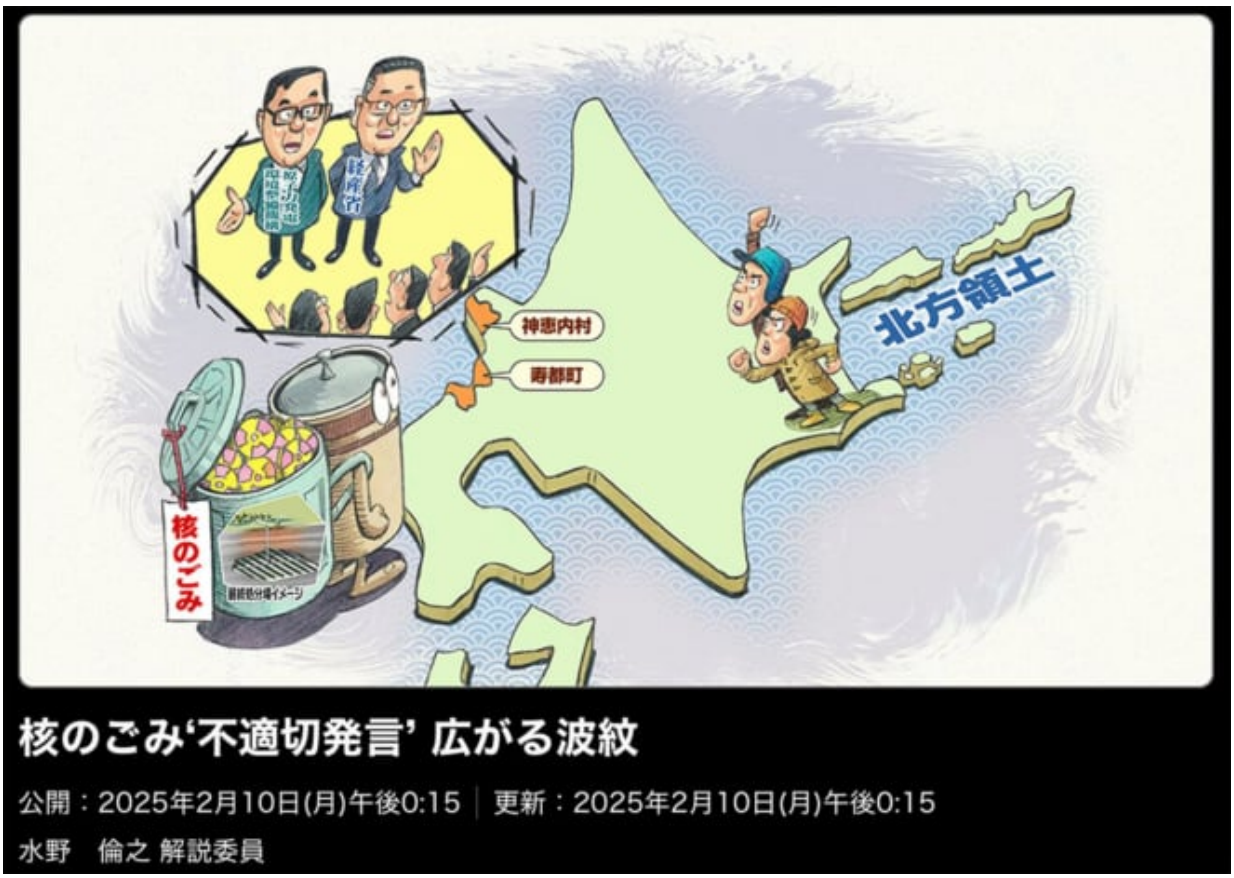
?? ?? · Sunday, March 2nd, 2025

????

??

????????????????????????????????????2010???????????????

??



©? NHK ??????

??????????——?????????

??

2011?1?????????????????????5?8???????????????30??
??

??18????????????????????????
??

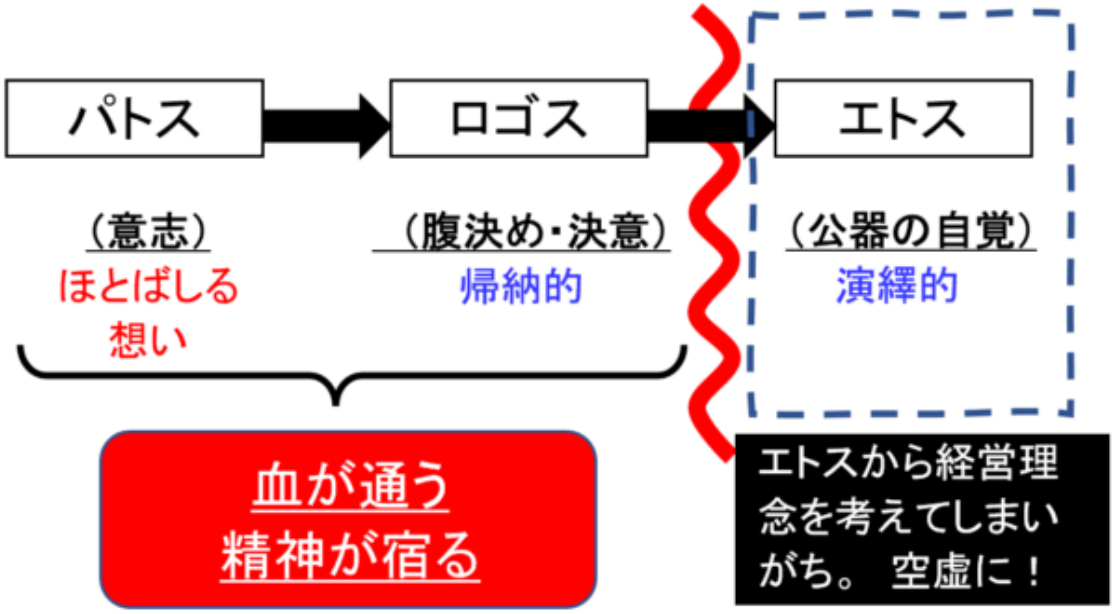
2024????11?????????????????????????2?3????????????

??

??
??
??????????????

??

??
??
??????????????????



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

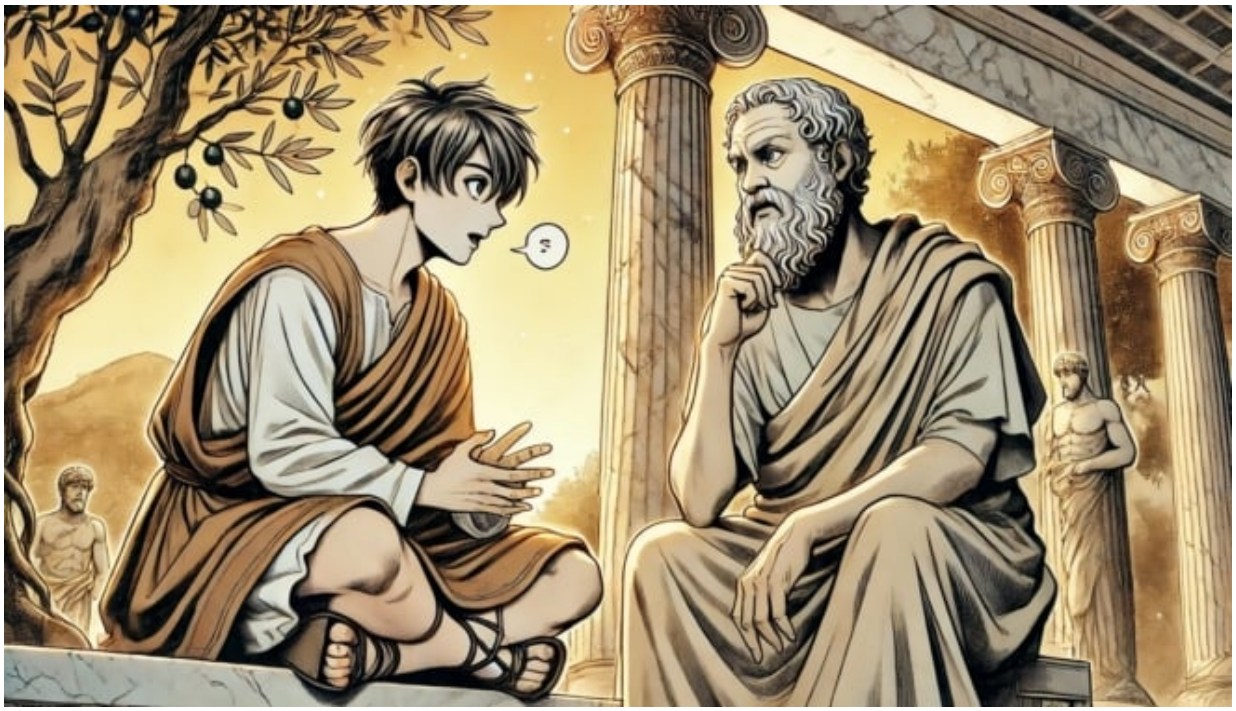
???????????A?B???2?????????????3???4??????A?B???2?????????????????A???????????B?????
??????????????????????????——??

???A?B??

??
??

??

??



????4?????——NIMBY?????

???????2024??????????????????

???????????????OG?????????????/?????????????????????????????????2???????6???????????????

??????????????????2?????????????????????5?????NIMBY????

??

??
??????????

??NIMBY??
??????????????????????????

??
??????????????????????

??????????????????????????YouTube??
?????????????????——————
??
???????????????

??

??
????????????????????????????????????

????NIMBY?????????????????????????????????????

??

??????????2024??????????????2?????????????????????OG????????????????????????????????
??
???????????????

??

???????

??

??????????????????????????Hokkaido Call 2024??????———????????????????????

??Call????????????????????????????????Call????????????????????????

????????????????????????????????

?????????????OG????3??2??

????????????2024??????????????

???????2025????????????????????????????????????

Hokkaido Call 2024???

????

?????6????????????????????????

?????????????????????????????

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

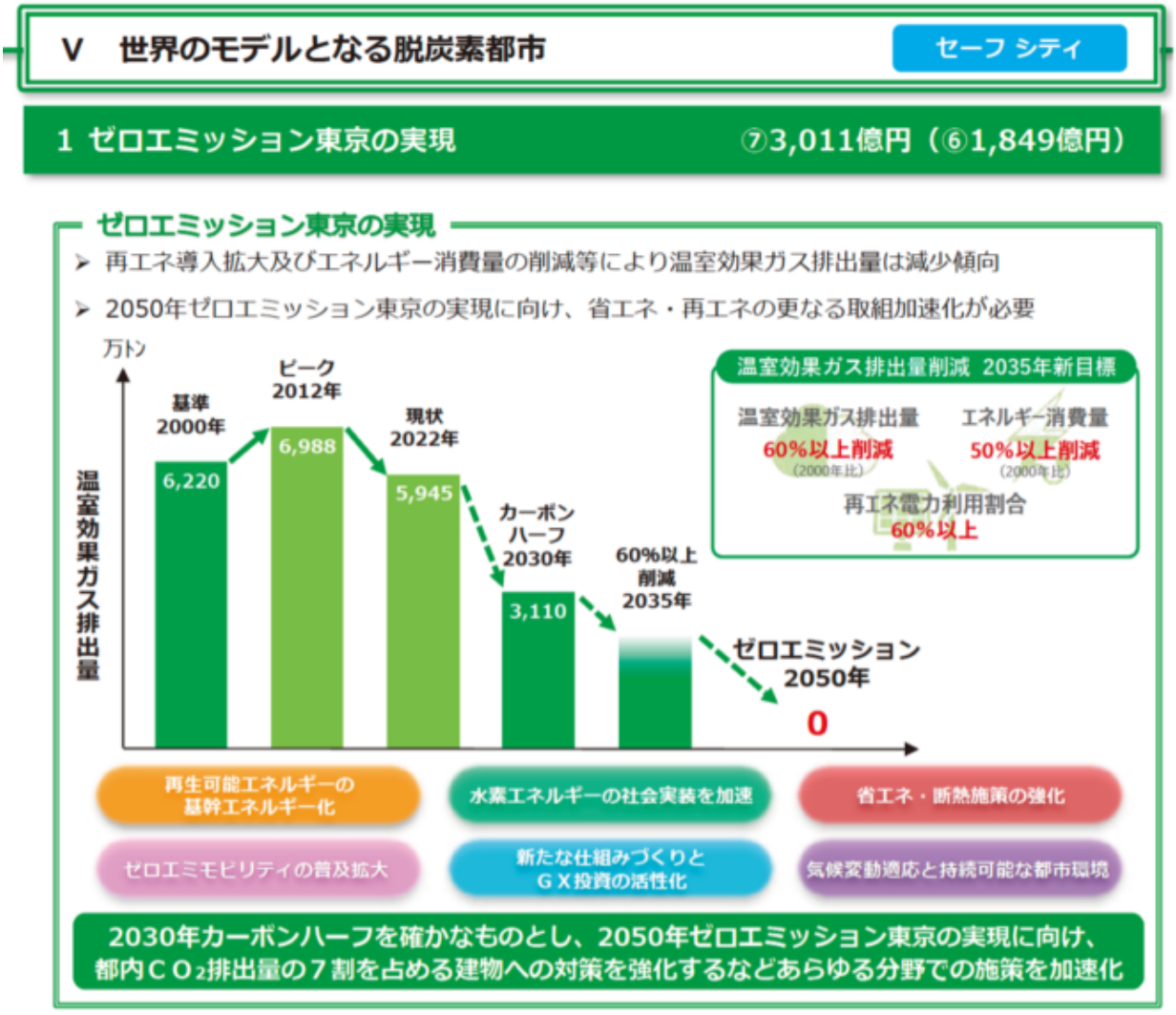
???3000??????0.0003???????????????

?? ?? · Sunday, March 2nd, 2025

Free art director/iStock

?????77?????????????

??????????????????3000???????????????



??7?? ?????????

??

??????????????????????????????

???????3000????????????????????????????????????

IPCC????1????CO2???0.5??????????????TCRE????????????????????????????

??AI???ChatGPT?????????

??????????????????????????????CO2?C??
?????CO2??

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

???????????2050??CO2??????????????0.00035???

??????????????0.0000245??????

????????????????????????1958????????????417mm????

2050??CO2???????????0.0001mm??????????

????2050?????0.0003????????????400??????0.1??????????????????????7?????3000????????

??????????????????

???????AI???

??????????????????

??

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

3000????????????????????????????????????1400??????**??2??????????**??????

??

??????????????????????????

?

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??CO2????2????????????????????????????

???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????????????

???????EF???????????????2???????????????

?1???????????EPA?2007??

??????????EPA????CO2?GHG??CO2?GHG?????
??????????????????????????EPA????????????????????????

??????????????EPA???????????????????CO2?GHG????????????????????????????????????EPA???
???????????????????EF??????????????

?2????????????EPA?2022??

???????EPA??????????????CPP????????????????????????????????CPP???????????Major Questions Doctrine??????????EPA??

???????????????EPA?2024????????????????????????2????????????????????????????????????EF????
???????????????????

EF??????3????

???????EF???????????3?????????????????????

?1?????????

- 2009??EF??????????????15?????????????????????
- ??15????????????????????EF????????????????????????????????????
- EF????????EPA????????GHG????????????????????????????

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

- 2009????????????????????GHG???????????
- EPA????????CO2????????????????????????????????
- ????EPA??

?3?????????????????????????

- ??
- ???100????????????????????????????????????
- ?????1?2??

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

1. EPA?????????????????????
2. ?????????????????????????
3. ???????????
4. ??????????????????????
5. ???????????

????

??10??????????????????????40%??

??Endangerment Finding????????EF??????????????

??

??

??

????????????2?18???2040????????73??????????????7???GX2040??

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

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

?? ?? · Sunday, February 23rd, 2025

William Barton/iStock

ESG??????????????????????????????????????

HSBC delays net-zero emissions target by 20 years

> HSBC?2030???
> ??????????????????

????????2030?CO2??????2050??????????????????????????????5??CO2?????????????????????????
??

????????????????????HSBC?ESG????????????CA100+?GFANZ?NZBA??????????????????????
???????2030????2050??

????????????????????????????

ロイターを検索

hsbc

「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、バ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?????????????????

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

??

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

??
?

?

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

???30?????????????????????????????

?? ?? · Friday, February 21st, 2025

jittawit.21/iStock

??????????????????????

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

??????????????????

??

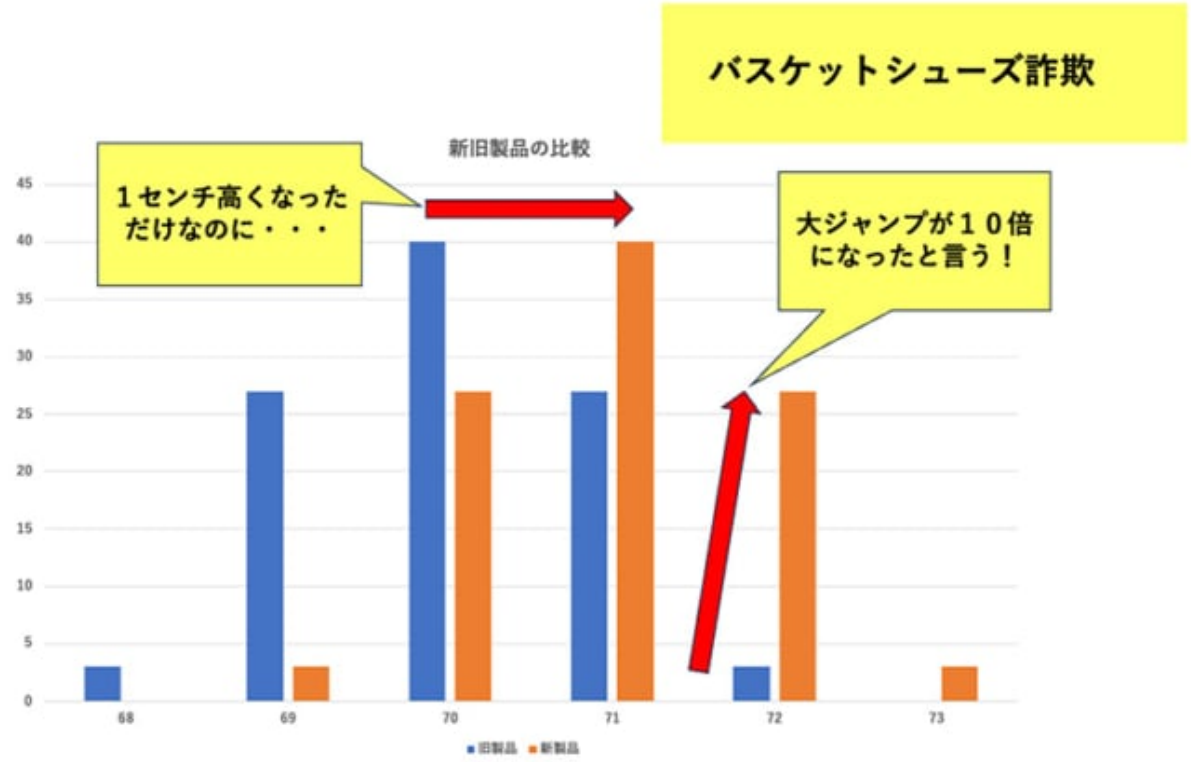
??????????30??1????????????????????????????1??

????????????????????????IPCC ?????????????1??

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

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

? ? ?



?1????????????
??????????cm?????100?????????????
??????????????????????1cm??????????????????????
?72??????????????????10????????????

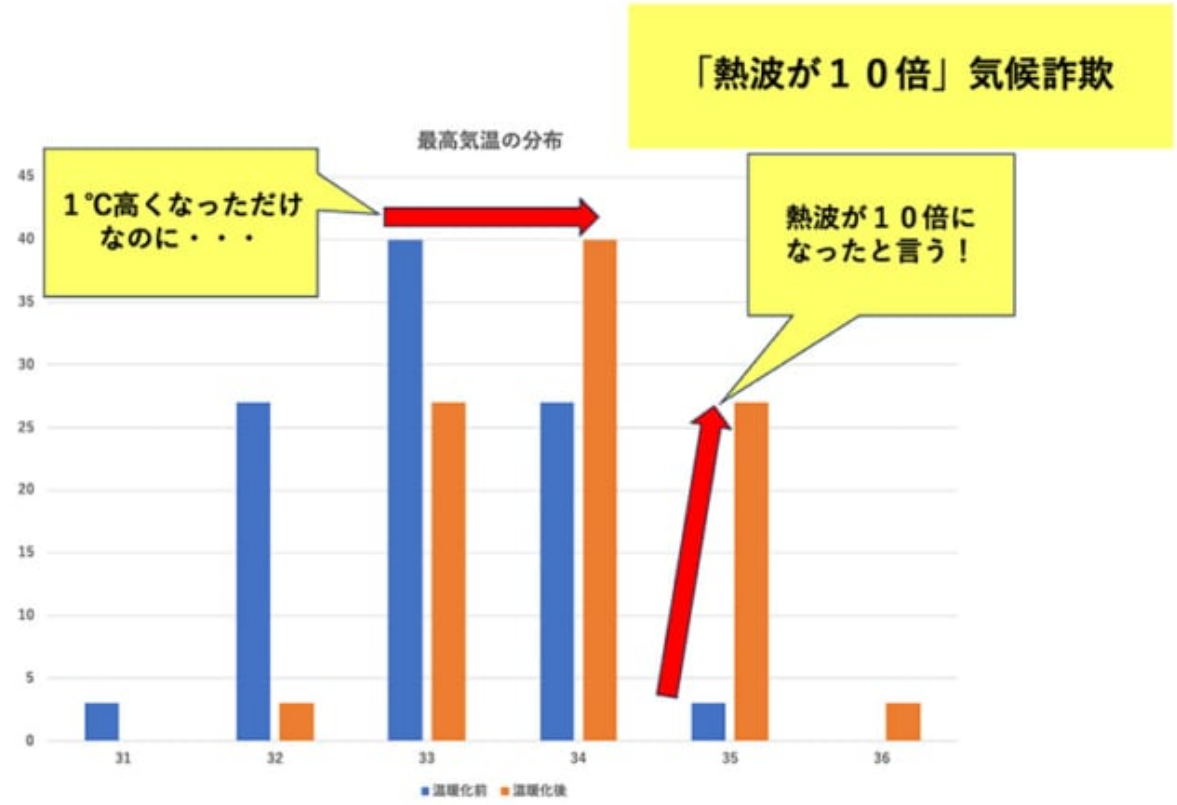
??

????????????????????????????????????1cm??????????????????????????10????????????????????????????
????????

??72cm??
??
???????

????????????????????????????????????

??????Xcm??????????????????????????????cm??X??????????
??2??



?2?????10???????
??????????????????100???????????
?????????????????????????1??????????????????????
?35????????????10?????????????

?????????????????????????????1cm??????????2022
??????????????????????????????????1???????????????????

??

?

Posted in ???, ????? | No Comments »

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

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

hapabapa/iStock

??????????2027?????????CO2????????????????????????????????

??????????????????????

> ????12??
>
> ????
>
> ????27?3????????3????????????????????????????????????28?3????????????????????
> ???????

?????????????????SSBJ??

??????????????????1????????????????????

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??????????
???SSBJ??????

????????????????????????????ESG????????????????????????????ESG????????????????????????????

????????????????ESG?????

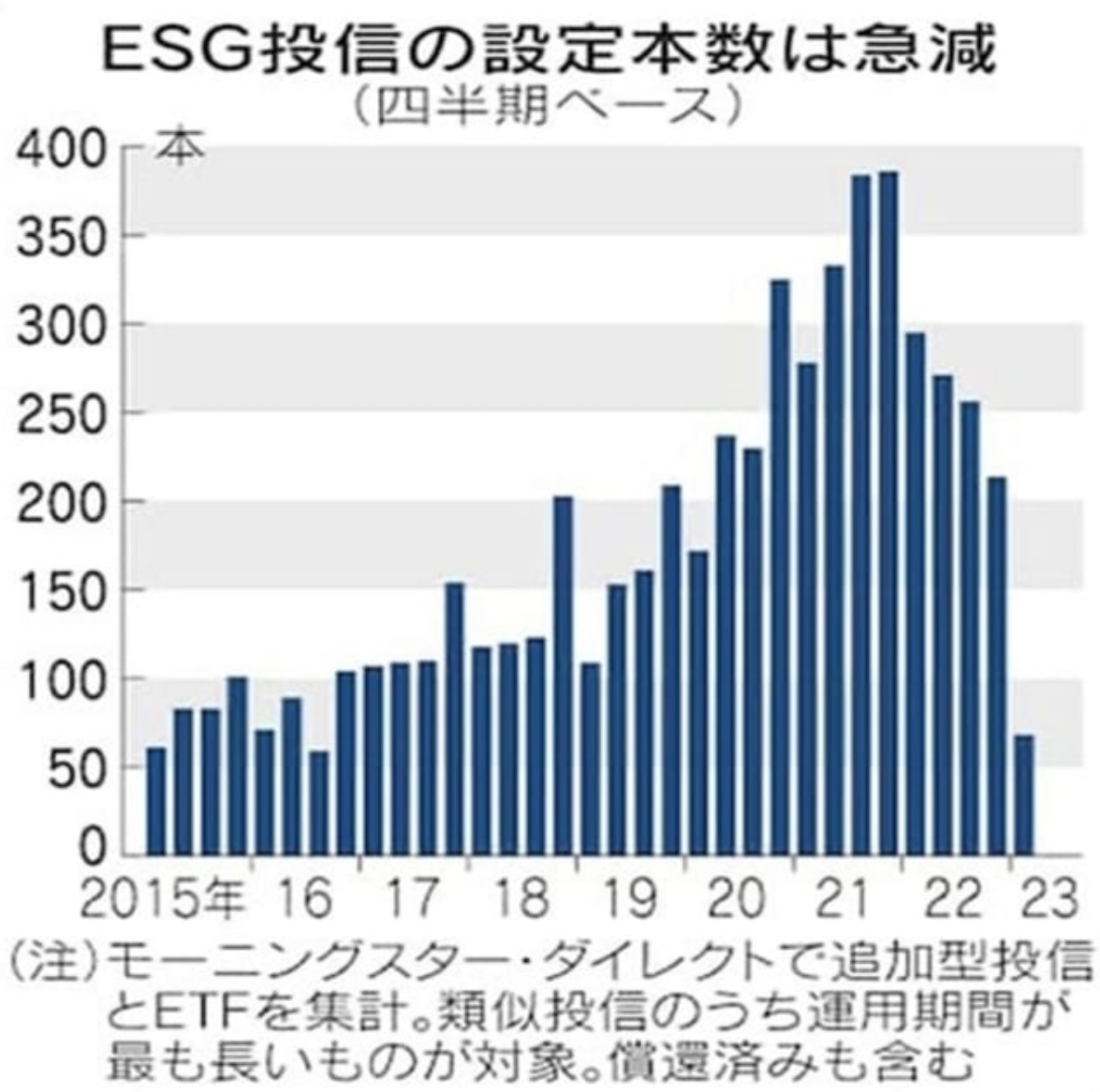
> A??CO2?????????????CO2??B??CO2?????
> ????????????????CO2????????????????????????
>
> ????????????????????2????3??
> ??CO2????????????????????????????
> ???????????
>
> ????
>
> ???ESG??

ESG????????????????????????

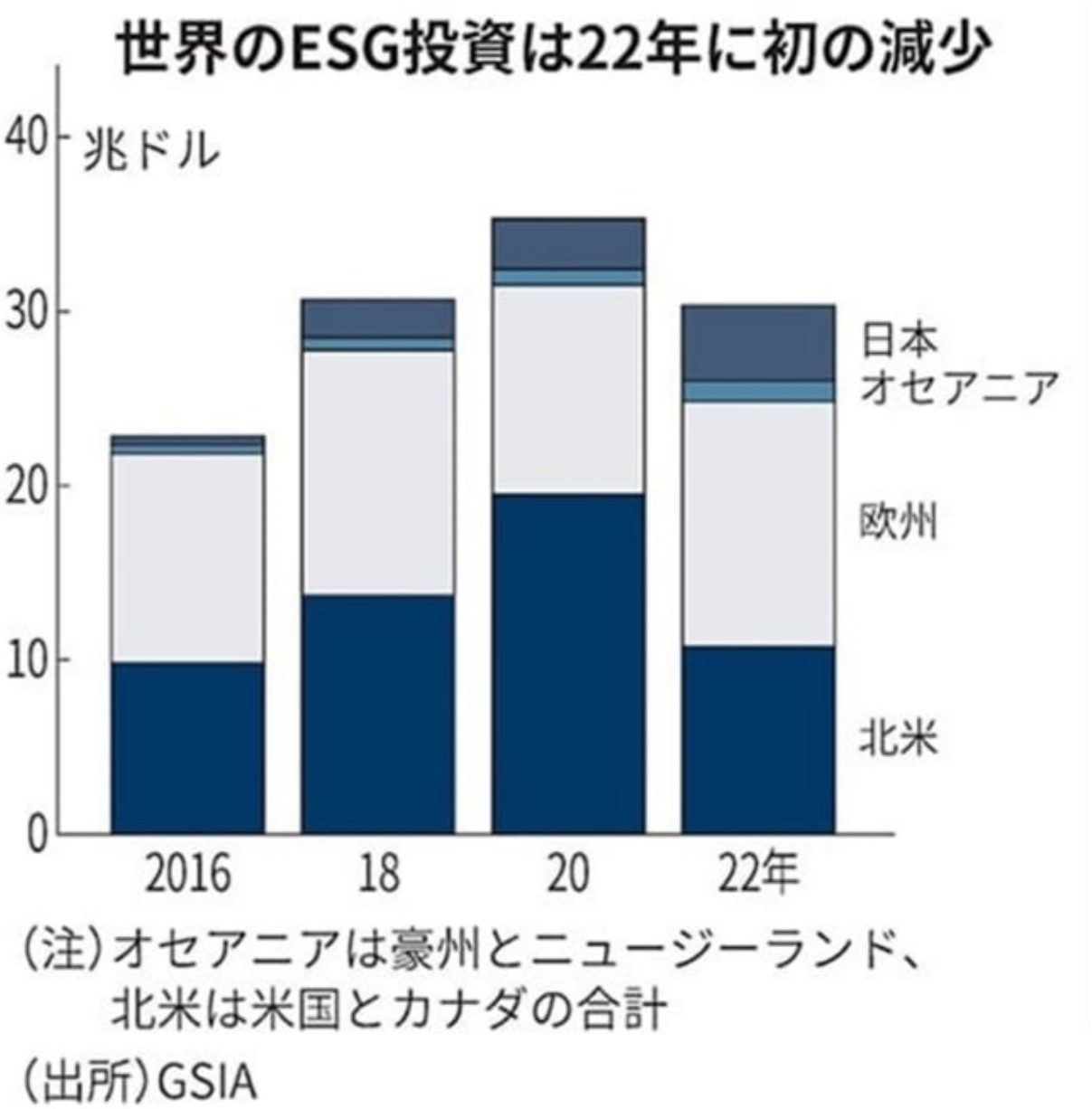
> S?????G????????E????????????????????????????????????2????????????????????????
> ??CO2????????
> ??

????????????????????????????ESG????????2????????3???2021????????????????????

2024?????????????????

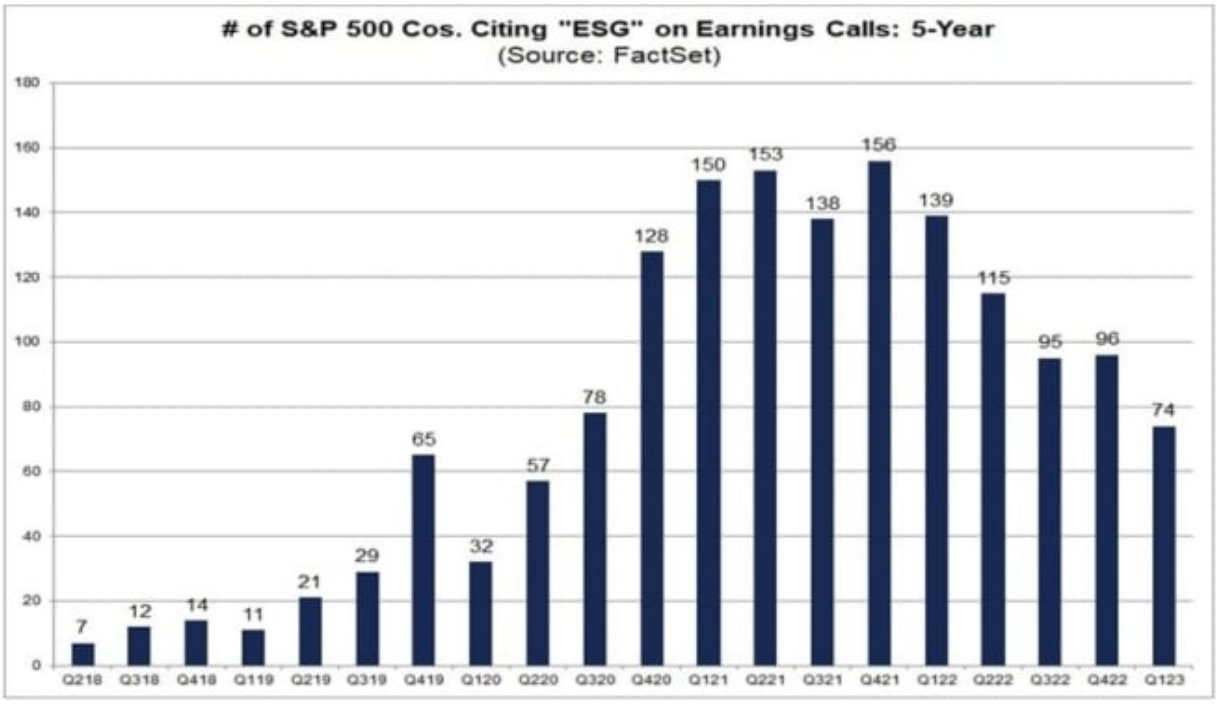


?2?ESG???????
???2023?3?20????????



?3?ESG?????
???2023?11?29????????

?4??????????????????????????????????ESG????????????2022???????????



?4????????ESG??????????S&P500????
???FACTSET

??????????????????????????GFANZ?NZAM?CA100+???ESG????????????????????????????
??

?

??????????????SEC??3????????????????????????????
??????????????????????2024?2????????

> ?????????SEC??
>
> ????
>
> SEC??????????????????2022?3??
> ??????????????????????

??????SEC?????3?????????1?2??

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

> ??
> ????????

> ??

> ???
>
> ????
>
> ??????????????(??)????????????
> ??
> ??????????????????????????????????????

> 2022??
>
> ????
>
> ?????S.E.C.????????????????????????????????????

??

?

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

??????????????????????????????????

?? ?? · Monday, February 17th, 2025

tugores34/iStock

????????2035?????????????2?10??4???
??

??????????????9?????????????

??????????????????2035??60?????????????????????????1????????????????????????????????????2?7??????
??

??????????????????????EU????????????????????????????????????

??????????????????????

2050????CO2??2035????????15??CO2??????????????

??????2035????60????2013??8????????????????????????????
??

????????????????????????????????

????????????????????????????LNG??LNG???????????????

??????????????2035??60??

??

????????1??Drill Baby Drill????????????????????????????????????

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

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

????????????????????????????

?????????????1??2?23?????????????????

??

??????????????????????????G7??

??

??

??9??

??2010??

??2050?CO2????????????????????????

?

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

??????????????????????????????AfD

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

Stadtratte/iStock

??????????????????????11??
??????????rot/grün??????

???????????????CDU/CSU????????/????????????????????????AfD????????????????????????????????
????????????????????????????????BSW??
?????

??3????????????????????????????????
??

???11??3???????
??

??EU?2??????????????????2???????????????
??

??

??????????????????????50??
????????????????????????????????????“??”??

??
??????????????????

??2017?9??????????????????CDU???????????
??????????3????????????????????

??

??20??

??????????????????????10??????????????2020??CO2??

??????????????????????????????????20????3GW?????5GW??????????????????8?10GW??????????????????????????????7GW??

??????????????23????????????????????????????????

Posted in ???, ?? | No Comments »

??????????????????????????????

?? ?? · Wednesday, February 12th, 2025

bombermoon/iStock

??
??????????????

???????????

??????????????????????????1,200???????

????????????????????????????????????800????????????????????????????????1,200????????????????????
?????????????400??????????????????????

??????????????????????

????????????????????????2024????800????????????????????3??
?????????????

??????????????????????????????

??????????????????????2024?9???
?

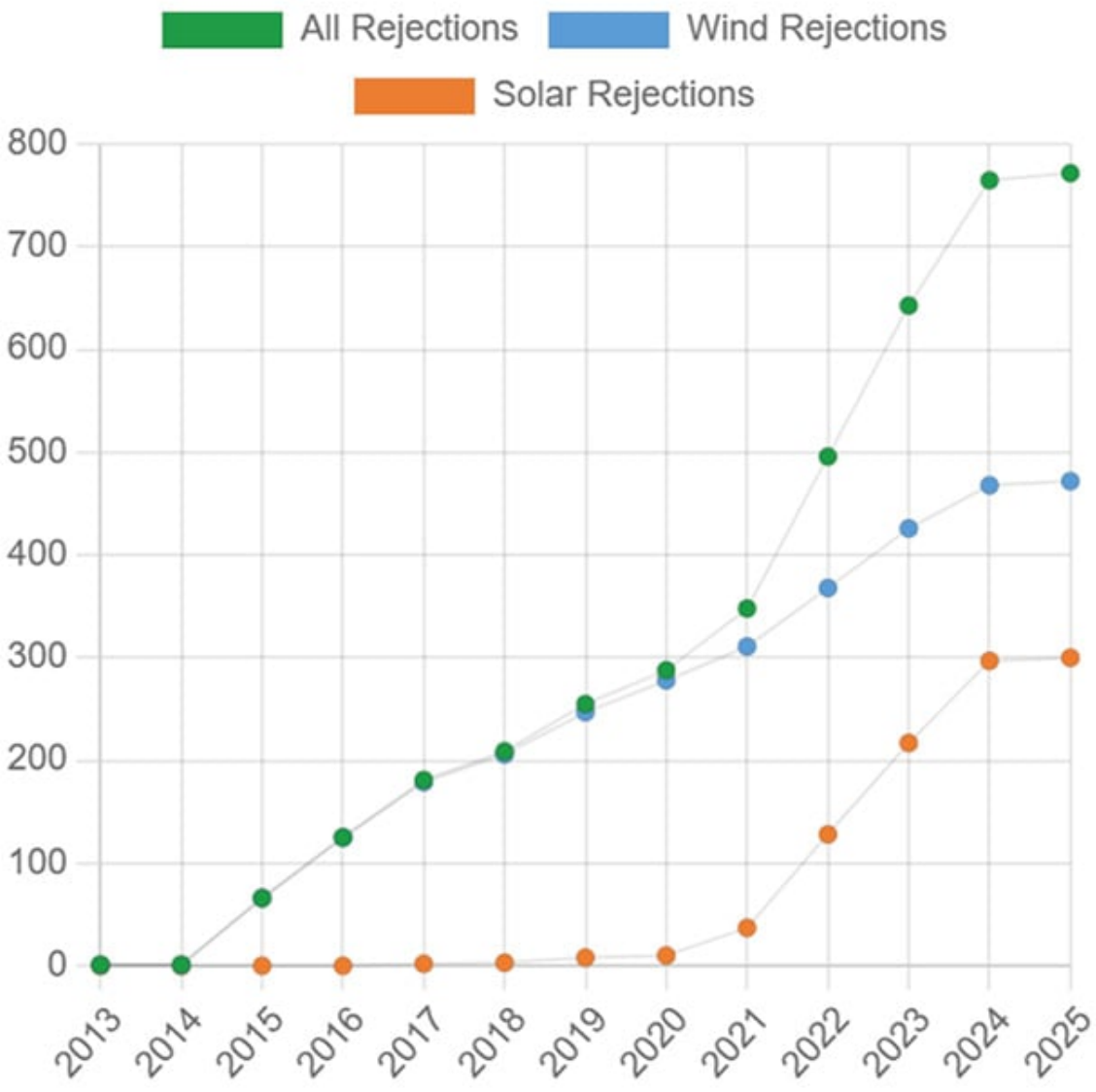
??????????????????????????????

????????7???
???????

??
??????

??

????????????????????????????????Renewable Rejection Database?????????????????????????2015??
????????????771????????????????????????????????



???Renewable Rejection Database

???????2020??

??17??

??Global Renewable Rejection Database??

2023??72????????????????????????????????20?30??????????????

	Global Rejections or Restrictions of Wind Or Solar Projects, 2023								
	Date	Country	Location	Notes	News Links	Type	Wind	Solar	Total
	20230104	Spain	Vega Baja	PLANS for two solar farms have been scuppered over concerns about their environmental impact on a 'protected' Alicante Province area. The proposals envisaged taking up over 300 hectares of land in the Sierra Escalona- the largest countryside area in the Vega Baja region. The application for the plants in Torremendo was funded by the Atitlan investment fund but the Ministry for Ecological Transition has turned it down.	https://www.theolivepress.es/spain-news/2023/01/04/controversial-solar-farm-plans-rejected-in-protected-area-of-spains-costa-blanca/	Solar		1	
	20230213	Belgium	Coutisse	Following a municipal commission that brought together minority and majority, the Ohey Municipal Council decided to give a negative opinion as part of the public inquiry concerning the Coutisse wind project. This project provides for the installation of a temporary measuring mast, a step towards the establishment of a larger wind farm, on the Arches Royales site, in Coutisse. All members of the Council, through the voice of the College, justify this decision by several factors. The first concerns the potential consequences on the health and well-being of residents close to the project (infrasound, noise pollution, stress and stress-related illnesses). Second argument invoked: the negative and irremediable impact on the preservation of the main features of the Condroz landscape.	https://www.dhnet.be/regions/namur/2023/02/13/ohey-dit-non-au-projet-eolien-de-coutisse-Q57I6QNAXDRD45BRQG3OFNSJFOQ/	Wind	1		

???Global Renewable Rejection Database

???Global Renewable Rejection Database??????????????????Substack??????????

??

??

??
??
?????????????????

??

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

??????????????

?? ?? · Tuesday, February 11th, 2025

Edgar G. Biehle/iStock

?????2024?6??

?????ESG????????????????????????????????????

????????????????????

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

> Arjuna Capital, LLC?Arjuna????????????????????????????
>
> ????
>
> Arjuna??Climate Action 100+?NZAM????????????
>
> ????
>
> Arjuna????????????????????????????????

> ??

????

???Arjuna???????1.5??
Arjuna??

2021??Arjuna????2????????????????????????????

????

Arjuna??1.5????????????????????????
??????????????????

??????????97?3????Arjuna?????????

????????Arjuna?2024??
????????????????????????????????????Arjuna??????**????????2022??2023????????
????????????????**??????????????????

??????Arjuna?????????????????????Arjuna????????????????????????????????
??Arjuna????????????????????????
???

??????**Arjuna??????????**?

????2024?5?22??**????Arjuna????????????????????????????????????**?

??????Arjuna??
??

? ????????????

??
??????????????????

??????**??????**??
????????ESG??

?

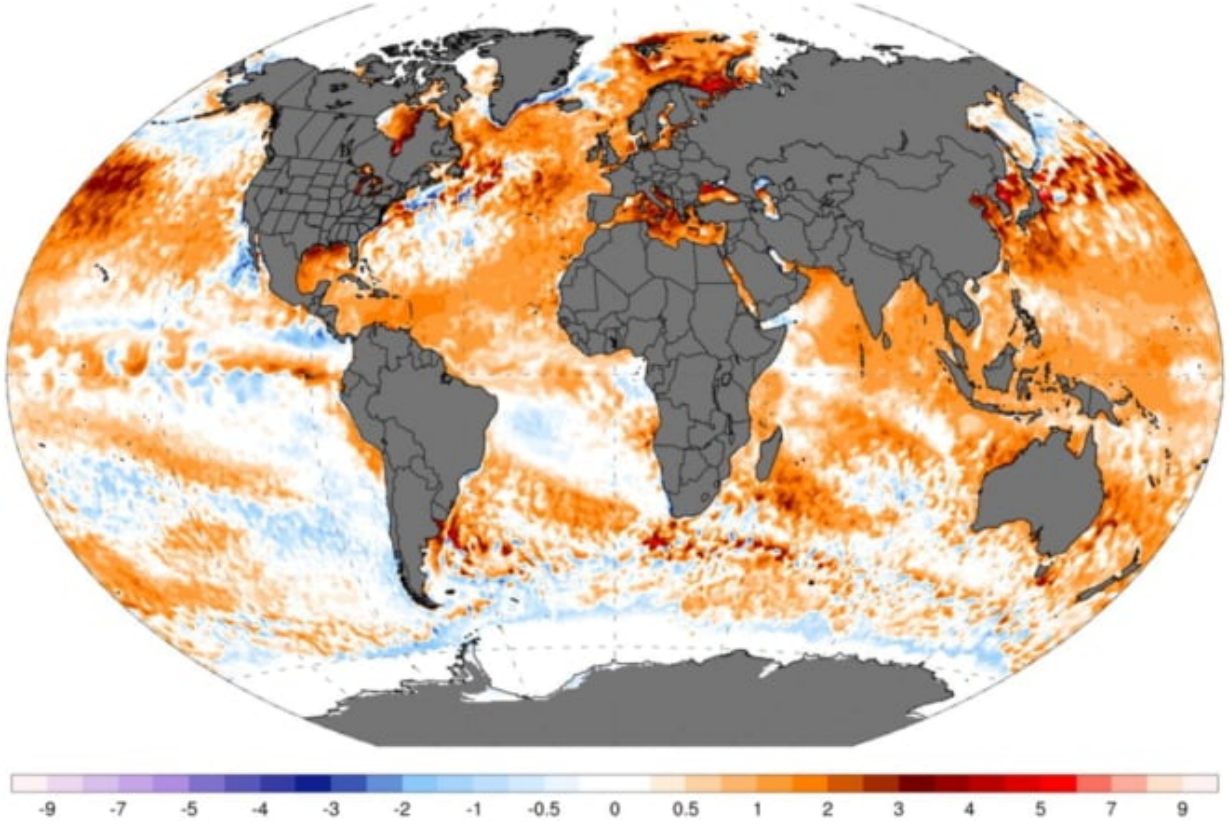
Posted in ???????????, ???, ???? | No Comments »

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

?? ?? · Sunday, February 9th, 2025

leolintang/iStock

The Guardian?2?4?????????????????????????????????????1988??

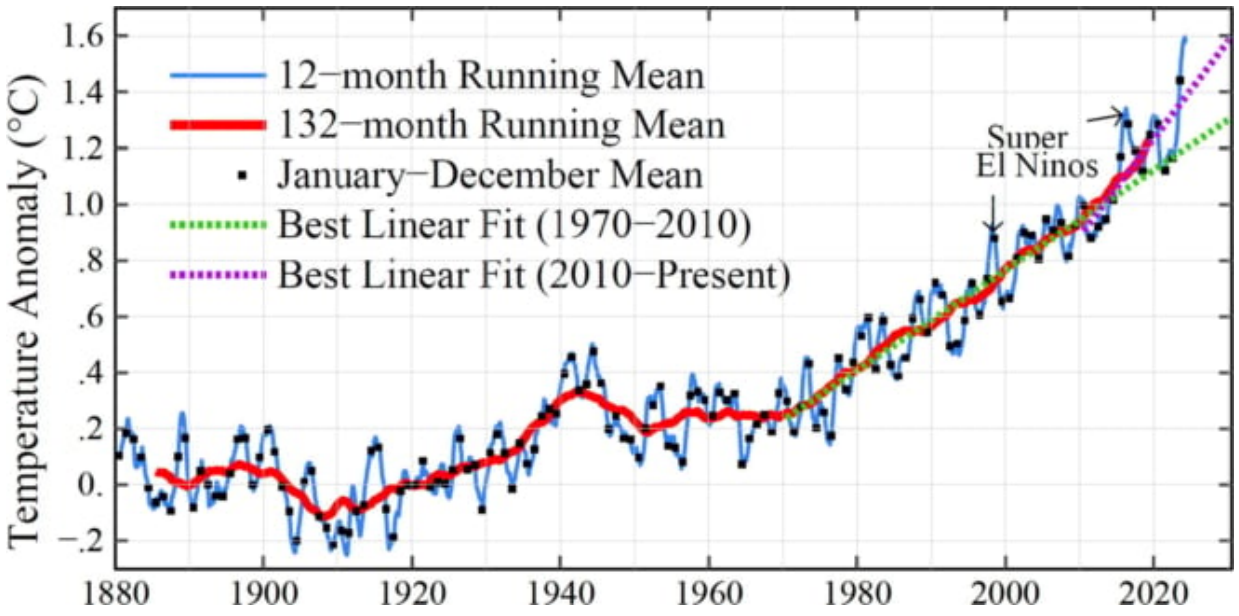


????????????

- **2???????**
  - ??????????????2???????????????
  - ????????????**????????**??????????????????????
- **??????**
  - 2020?? **?????????** ??????????????????
  - ????????????????2045????2????????
  - ????????????????????????????????????
- **?????AMOC??????**
  - ???1.3????????????????????
  - ????????????30????AMOC????????????????**???????????**????????????
- **?????**
  - IPCC????????????????????
  - ????????????????????????
  - **???????????**????????????????????????

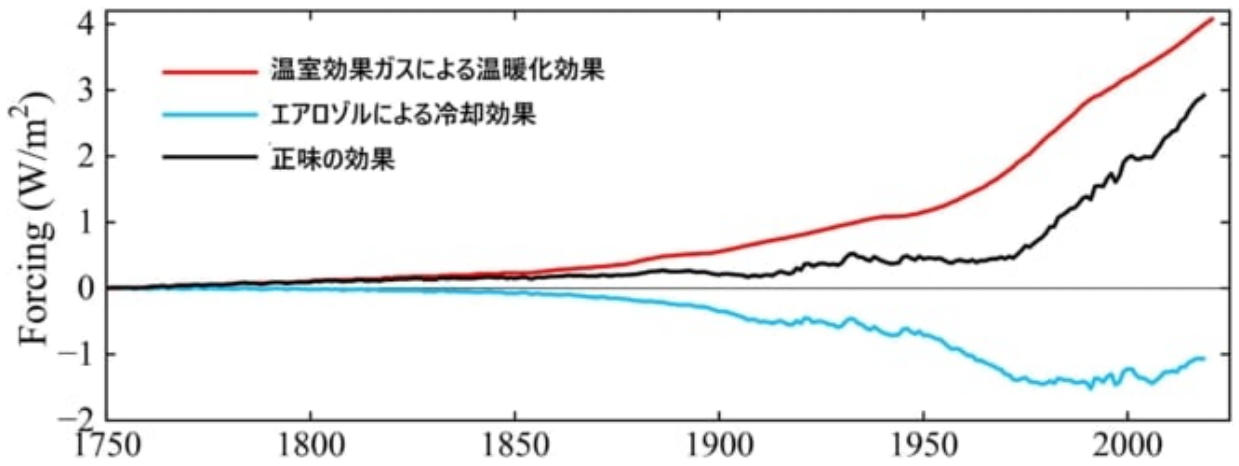
????????????????????????????????

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



??????????????????Hansen et al.?

- **????????**
  - ??2??? **??????0.4???** ??2024?8??? **+1.6?** ?????
  - ???????? **+2?3?** ????????????????????????????????????
- **IPCC?????????**
  - ??????????????IPCC?????????
  - IPCC??
  - ????????????????**????????**??????



??????????????Hansen et al.?

- **????????????**
  - 2020?? **?????????** ????????????????
  - ?????????????????????????? ? ???????
- **AMOC??????**
  - ?????????????????????????????? ? AMOC???????????
  - AMOC??????? **????????????** ?????
- **??????????(?????????**
  - **???????????**?SRM? ??????????????

- ??????????????????????????????????
- ??????????????????????????????????????

- **?????????????**
  - CO2?????? ??????????????????
  - ?????????????10?20?????????????
  - ??????????????????????????????

????????????IPCC?????????????? ????????????????????? ?????????????? ?????????????

2020???? ????????? ??????????????????????2045???? ????2??? ?????????

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

Posted in ???, ????? | No Comments »

?ESG??????????????????????????????

?? ?? · Sunday, February 9th, 2025

malerapaso/iStock

?????2024?6??

????????????????????????????

??

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

> ??
> ??????????????????????????????????????

> ??
> ??
> ????????????????????????????

????ESG??????G??

> ??
> ??
> ?

??????????????????????CO2??????????????????????CO2??
??????????????????????????????1.5??
????????????????????????????

????????????????????????????[??]??

??CA100+?GFANZ?NZAM?NZBA?NZIA?NZAOA…????????????
????????????????????????????????????

> ??
> ??
> ??????

????????????ESG????????????ESG??
??????????

??ESG??
?????

????????????????????????????ESG??
????????????????????????

???????????ESG??
????????????????????????????????????

???????????2021?6?????????????

ESG??????????????????????????

> ??????????????????????**ESG??**???
> ??3??????????????????????ESG????????
> ??
>
> ESG???S?G??ESG??????????????????
> ???????????3????1??
> ??????????????????ESG??

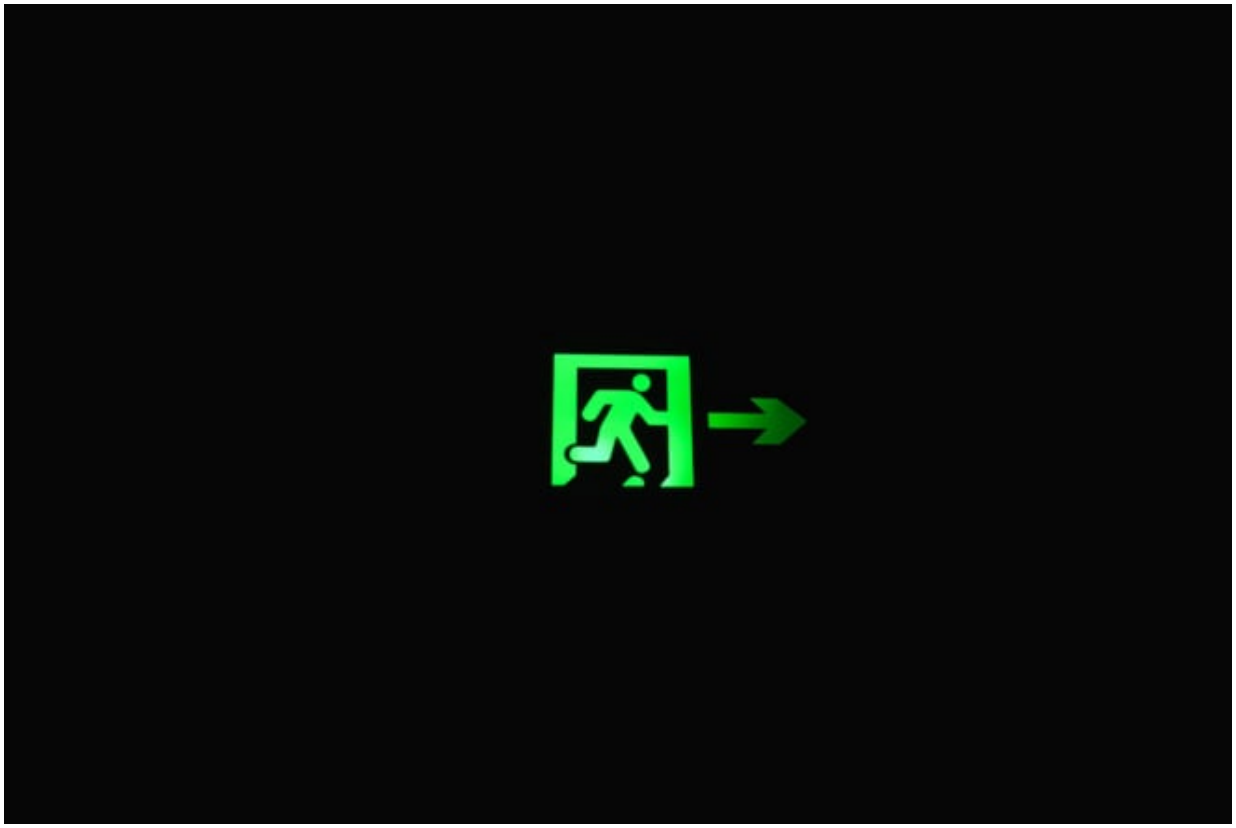
??ESG??????????????????????????ESG??????????????????
??

?

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

??????????????????????

?? ?? · Friday, February 7th, 2025



patchanan promunat/iStock

??????2024?6??

????????????????????????????

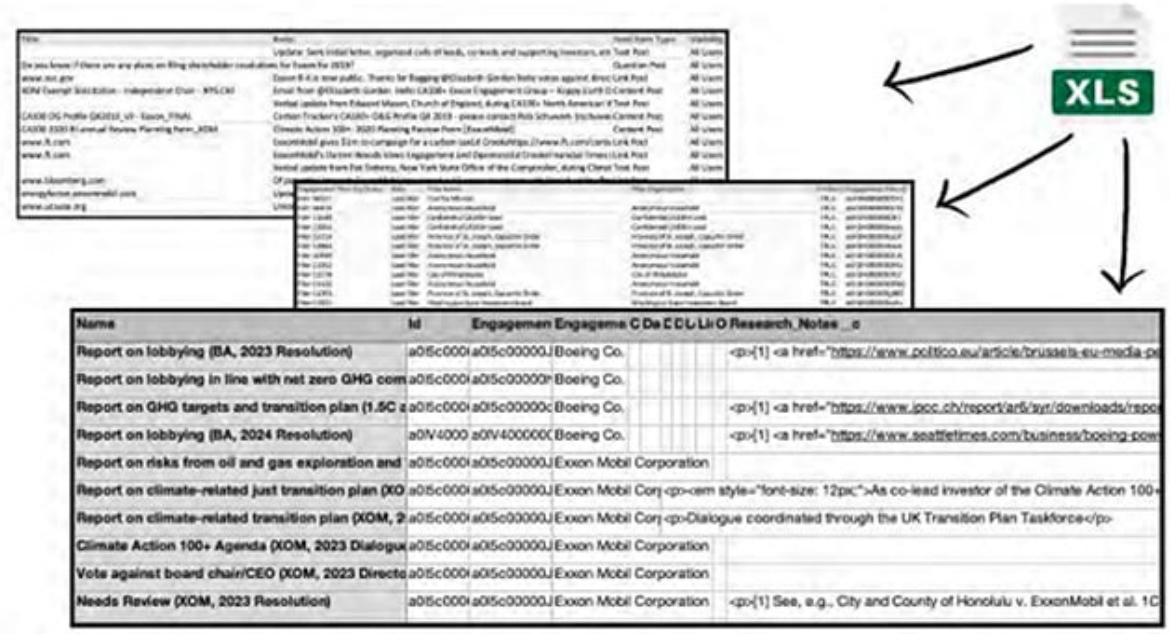
??

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

> Ceres???
> ???Ceres???????????????? Ceres??????????Ceres???????????????????? (????????)
> ??????????????????

> C e r e s
> ??Ceres???????
> ????????????????????????????????????Ceres?????Ceres???????????????????

> ???????Ceres??3????????????Ceres?????
> ??



Ceres??2024?3?22??Ceres??????????????????
????????????3??????????????
??????????????

??ESG?G??
??

?

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

??????????????????????

?? ?? · Thursday, February 6th, 2025

Thx4Stock/iStock

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

????????????????????????????

????????????ESG??

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+??

> ??????????????????????

> ????

> Climate Action 100+??

> Climate Action 100+??????????????????????????????????

> ????

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

> ??????????? Climate Action 100+????????????????????????GPIF???????????500??Climate Action 100+??????????????????

> ???????????Climate Action 100+????????????????????????????????????

> ??J.P.????????????????????????????????3????14????????????Climate Action 100+??????????

??ESG????????????????????ESG??????????????ESG????????????????????????????ESG??

???????Climate Action 100+??????????????????????????????????

??ESG??????????????????

????????????????????????ESG??????????????????????????????ESG????????????????????????

??????????????????????ESG??????????????????????????????????????

?????Climate Action 100+???????????????????????????**?????**??

?

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

??????????????????????????????

??? ?? · Thursday, February 6th, 2025

Young777/iStock

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

?????GWPF??????????????????????????????

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

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

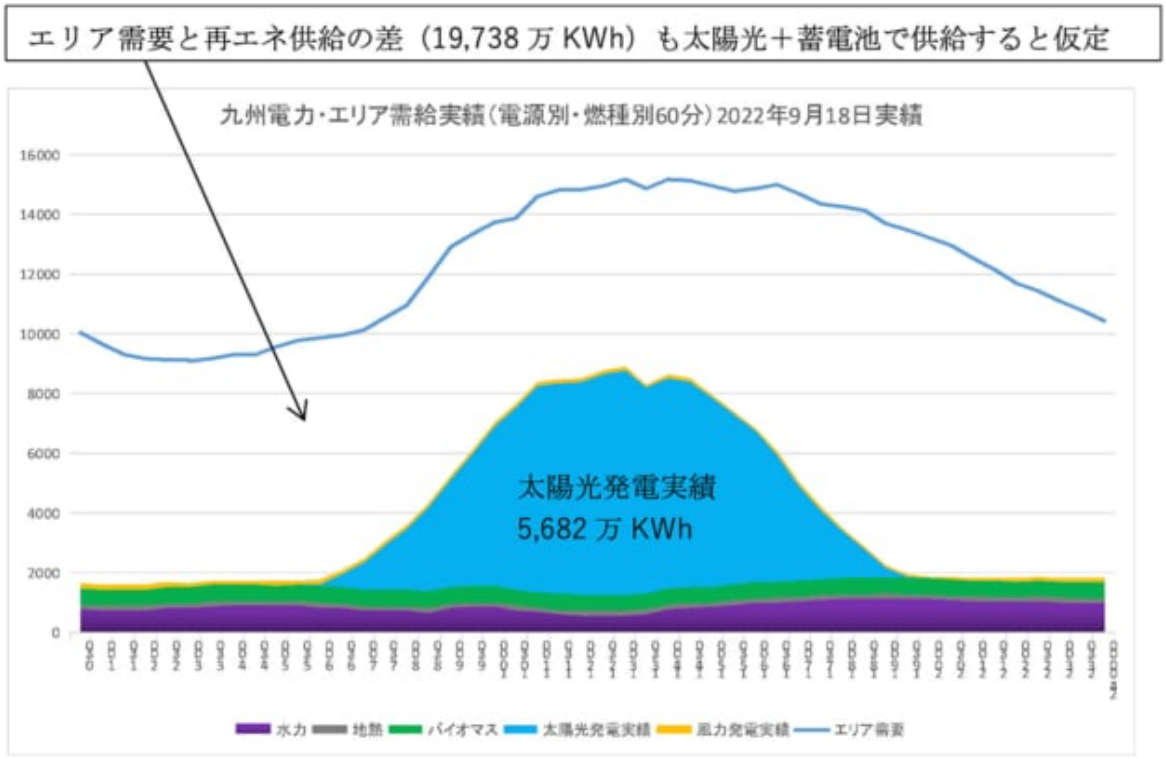
??????????2??2????????????????????
????????2024?7?9????????????

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

??????????????????2022/9/18?????????2????????????????????????????2????????????????????????????????
???????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????????????????????
????????????????????10????????????????????



?2????????????????????2022?9?18??

??????????????????????2024/9/18????????3??????????????49,229?KWh????????????????????????
????????????????????????????????11.3?KWh???????8,000???????????

?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???? ?????? ??????????
????????????????

3. 1??????????????????

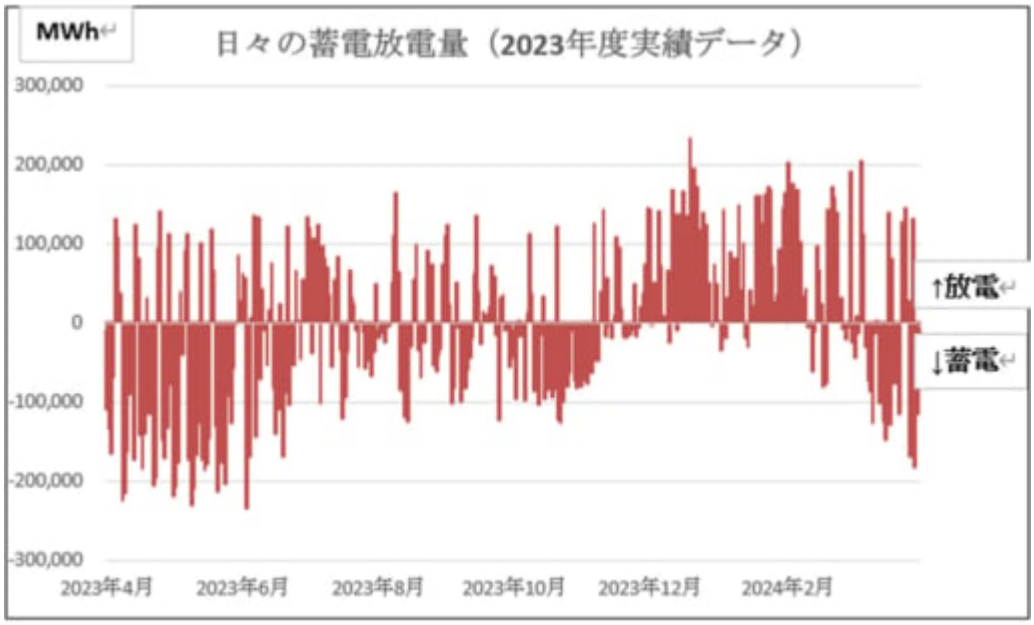
?????????3??
????????????????????2023????????????????????????????

??4????????????????????????

??N?????????????????????????????N=5???
????????????????????1??

?4????????????????10????????????????????????????????2023?11?5??**7,683,587MWh**???

??
??2024?3?6??



?4????????????????????????
2023????????????**???????5????**??????????

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

?768,358?KWh ÷ 11.3?KWh ? 67,996 ?

?????????

?8,000? × 67,996? 544 km^2

???????340km^2???1.5????????????????????????????????????

???????????2.5????????5??
?

4. ????????????

??1=150????????????kWh??????

	容量(MWh)	工事費(億円)	単価(円／kWh)
東北電力&みずほリース　工事実績	22	16	72,000
関西電&オリックス　工事実績	113	80	70,000
三菱総合研究所報告書（2024/8）	—	—	68,000
※　アメリカ　2021 年実績	—	—	52,500
※　アメリカ　2022 年実績	—	—	85,050

?1??????????????????????????1KWh??????
????????????????????????????
??

??????????70,000?/KWh???????

?3???????????????49,229?KWh × 70,000 ? 34?4600??

?1??????????????768,358?KWh × 70,000 ? 537?8506??

???GDP???2024??2?????607?5064???????1????????????????????768,358?KWh???????????????GDP??????537?8506????????????????????????????????

5. ??????????????

????2???3???????????????1/3??

???????????????????????????????2025?1?16????????????????????3,000??

?????????????????2024??

??

??????????Docomo??MSE??

6. ???

??????????????????????????????????

	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

?2 ????????100??????????????????
????????340km2???1.5?????GDP????????

?5 ??????????????????????????????????
KSBW???????

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