

Global Energy Policy Research | GEPR

[illegible]

GPIF?ESG????????NGFS????????????

?? ?? · Thursday, December 11th, 2025



wenjin chen/iStock

??2???????????????????ESG???
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[illegible]

????????????2024?????2????????????????????

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Jr.??OECD????????????????????????????????
 ??NGFS????????CO2??
 NGFS??

???NGFS????????????????????ESG????????????

2025 GPIF ????????????????? ESG ?????????

GPIF?2024????????????????????????????????????4????????NGFS Phase 4
 Scenarios????????????????????????2023??
 GPIF????????????3????????????4????? Net Zero
 2050????????PnL????????????4????????????????????

MUFG?Climate Report????????2025

????????NGFS????????????????????Net Zero 2050?Delayed
 Transition?Current Policies????????

????????TCFD?TNFD???? 2024

????????????????????????????????NGFS????????MSCI????Climate Value-
 at-Risk (CVaR)????????

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SOMPO???????? ?????????2024

??NGFS????????????
 ???MSCI?????Cl
 imate Value-at-Risk?CVaR????????????????????

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

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

GPIF??ESG??
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GPIF??

??ESG??ESG????????????????????????????????????
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Rachel Reeves hit with urgent warning as Sweden’s pension disaster exposes huge ‘danger’ in her plans

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Sweden’s pension disaster rings alarm bells for Reeves

????????????????????????????AP????????AP2????????????14?6000????????1?
1770????????

????????5?8000??
????????1?9300????????????????????????????????????

????????????????????CSE????????WTO????????AMF??
????????19????????

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??ESG????????

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Posted in [???](#), [????](#), [?????](#) | [No Comments »](#)

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??? ?? · Thursday, December 11th, 2025



Stadtrate/iStock

2025?11?29?blackoutnews????????????????????600????????????????????

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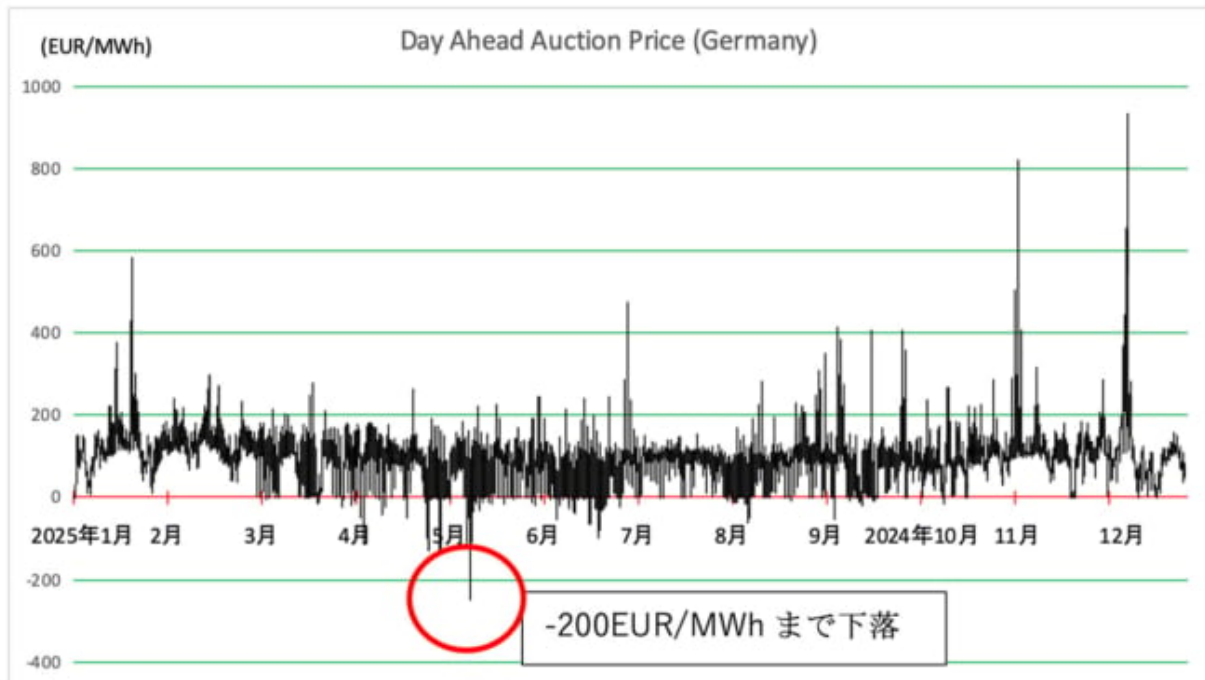
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?????????“600?”????

?1??2024?10??2025?9???1??150EUR/MWh????????3???9
 ?????????????????????????????



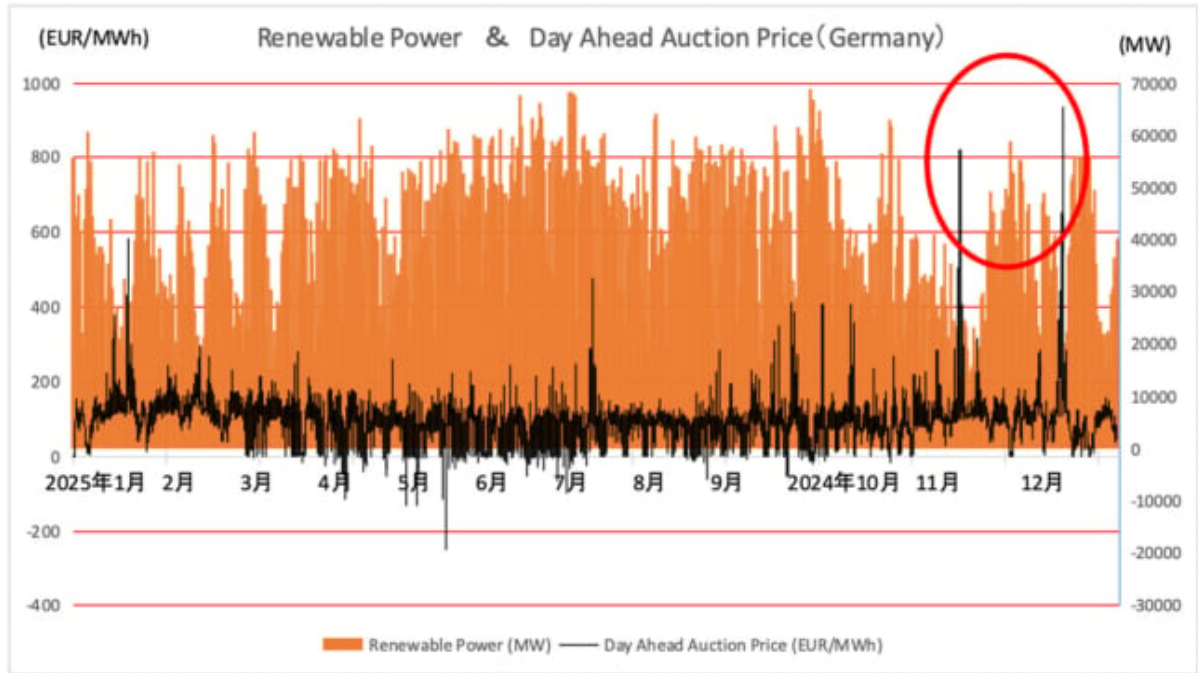
?1????????????????2024?10??2025?9??

????5?11??12??15????????????????????????????????-200
 EUR/MWh????????1????????????????????????????569????????

????????????????600????????????????????????????

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 ?????????????????70EUR/MWh????????????????????“????????”????

????2????????renewable power????????????????????



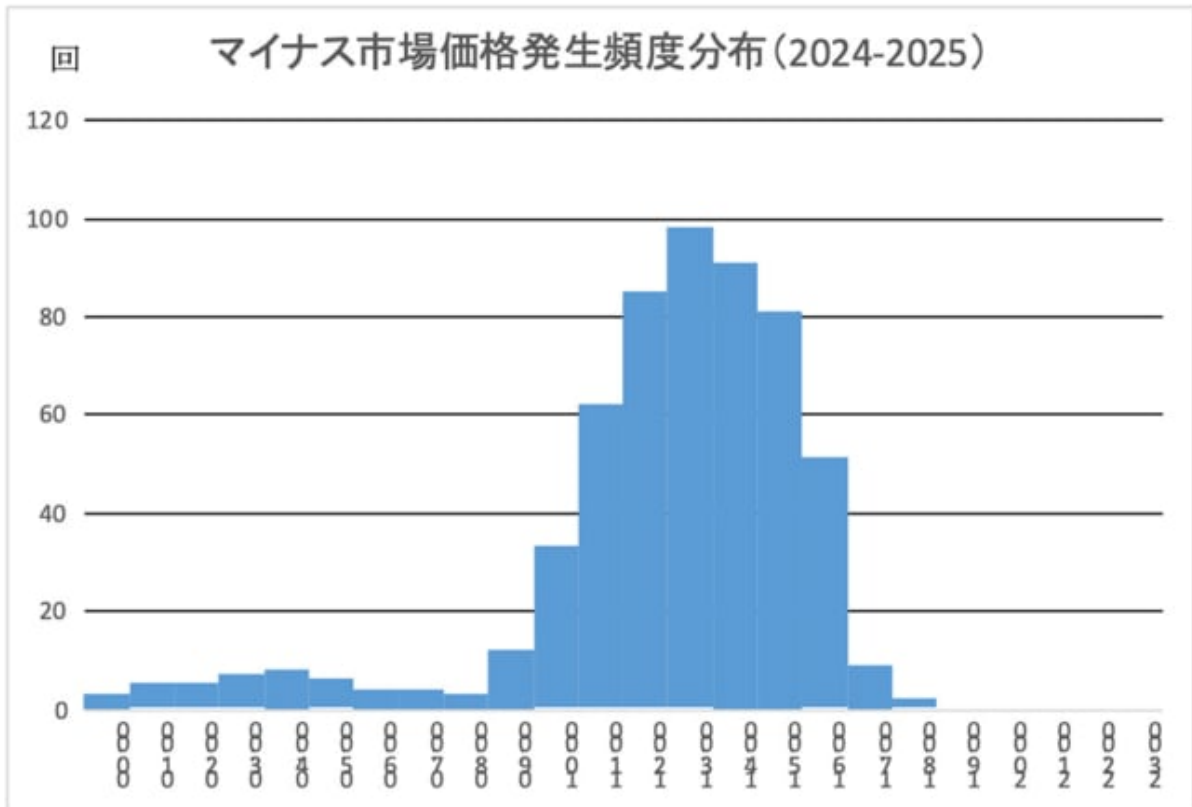
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4??9????????????? renewable power??11??12??renewable power??

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LNG??800EUR/MWh????????????????????????????????
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“????”????????????

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??3????



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

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???11?15??11?15????????????????????????????????
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Posted in ??????????, ??? | [No Comments »](#)

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?? ?? · Wednesday, December 10th, 2025



Sunshine Seeds/iStock

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??AI?????????
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??AI
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Energy Dominance – Restoring American energy dominance (in oil, gas, coal, and nuclear) and reshoring the necessary key energy components is a top strategic priority. Cheap and abundant energy will produce well-paying jobs in the United States, reduce costs for American consumers and businesses, fuel reindustrialization, and help maintain our advantage in cutting-edge technologies such as AI. Expanding our net energy exports will also deepen relationships with allies while curtailing the influence of adversaries, protect our ability to defend our shores, and—when and

where necessary—enables us to project power. We reject the disastrous “climate change” and “Net Zero” ideologies that have so greatly harmed Europe, threaten the United States, and subsidize our adversaries.

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

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??AfD????????????
??UK????????????????????

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

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?? ?? · Sunday, December 7th, 2025



wildpixel/iStock

9?5????????????????????????????????????

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????????????????2100????GDP?6????
2024????2????????

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Jr.????????OECD????NGFS????
???CO2????NGFS????
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????GDP???2??6????

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????NGFS????2026??
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???NGFS????

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Posted in ???, ????? | No Comments »

COP30??????????

?? ?? · Saturday, December 6th, 2025



COP30??????

COP30??1????????????4?5????????COP????????????
??NGO????????????????????
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?????1????????????????????????3??11?16?19????????????????????????????????

??NGO????????????????????
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???11?16????????????????????COP??
??COP????????????????
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?????????11?20??
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????????????????????????COP??COP????????“Least
Inclusive”????????COP????????????????

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??COP30??

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COP30????????10????1.5????

????COP30????????????????????????????????COP????

????????????????1??2017?21?
????????????????????2020?11????1????????????????3????????^{21?}????????????????????
????COP????????????????????????????

????????????????1????????1????????????????COP30????????????????????
????????3??COP33?4????????

????????????????COP??
????????????^{22?}??

????????????????????USCIB????????COP????????????
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EU????????????

????????????COP??1.5????????????????????E
U????????????

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????????COP30????????????

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CBAM????EU?“?”

??EU????????1??EU????????CBAM????
????????EU?????
OP????

????????2028???3????????28????COP????
???????

C B A M ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? Business
Europe????CBAM????????????????????COP????
????WTO????WTO????CBAM????COP????
????COP????CBAM?COP????

EU??????????10?????

????????COP????????????????????EU??
????????CBAM????COP??3????????????
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??EU??
??EU????????COP??

????????10??

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1????????????2019??11????????????1????????????2020?11????
2??

Posted in [???, ?????](#) | [No Comments »](#)

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?? ??? · Thursday, December 4th, 2025



Trifonov_Evgeniy/iStock

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??50??????130??????????????????

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??20????????????????2030?2050??????????7??
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- 1. ????
- 2. ???????????

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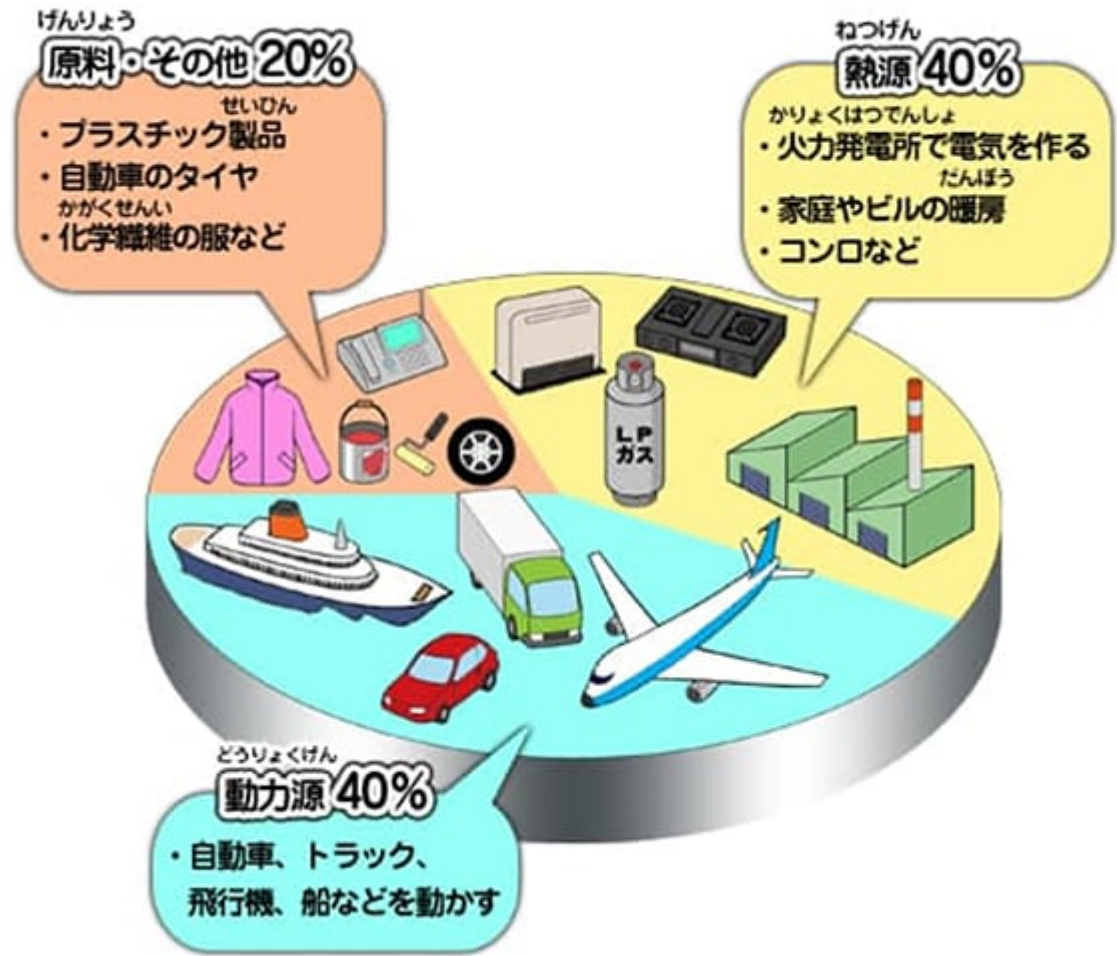
?1???????????

?1????????????????????????????????2021??^{21?}

??	?????	??
??	41.7?????	?9,000??????1,140??????
??	80?????	?????50????????
????	4?m ³ ??	??????124?m ³ ?320??

??????????1??????????80????40????40????????????42??????34????????????????????????

石油の消費割合



?1??????????
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BP???2023????????????????????????????2?

?2????????????????????BP?? 2023??

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??	?50?
????	?53?
??	?132?

??100????????????????

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

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??20????8???

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???1????????????????????????????????3?5?30?50kg????????????

?3????????????????8,100????????????????243?405????????????
????????????????????????????????????

????????????????????????CO????????????????????
??577????2024????????????????1?4,000??1??????

????????????????????????10????????????????????8?
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2030?2050????????????????7????????
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- ?1????????2023?
- ?2????????
- ?3?Beautiful Chart????2000?2023????
- ?4?100?kW????1????21????
- ?5?????IEA?2024?????WEO 2024??

Posted in ??????, ??? | [No Comments »](#)

2026????????????

?? ?? · Tuesday, December 2nd, 2025



ThomasVogel/iStock

2026??

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2025?2????????????CDU?CSU????????SPD????????????????????

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????????????????AfD????????????????CDU?CSU????????????????????

AfD??

	???	AfD
???????	52%	24%
?????????	40%	26%
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????????????CDU?CSU?208??SPD?120???????328???630???52?????AfD?152???24?????????INSA????
2025?11???BILD?????????CDU?CSU??24.5??SPD??15.0??????11??AfD??26????????????CDU?CSU?SPD?
??????40????

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??RN????????????
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RN?????????????????????EU??
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2024????????????NFP?????????Ensemble?????????RN????????????????????????????
?????????????????????????????Ensemble?LR??RN????????????

	?????Ensemble?LR?	?????RN?
???????	34%	25%
?????????	27%	35%
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2024??
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???Reform
UK??Reform
UK????????????????????????????

Reform UK??

	???????	Reform UK????
???????	63%	1%
?????????	20%	31%
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????????????2025????????????Poll of Polls????????????20???Reform UK?30????????20????????

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2029?????

????????????????????2026??
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????????????2024??????5????????2029????????????????????????????????????2027????????????2029?????
????????????????????????????????2025??????4????????????????????????????????2029????????????

????????????????????????2029??

??2026??????2029????????????
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Posted in ???, ?? | No Comments »

COP30??????????10??????1.5??????

?? ? · Monday, December 1st, 2025



COP30??????

11?15??22????????????????COP30????????????????20??COP????????COP30????????????????

COP30?????

COP30??2025????????10????????
????????80????????????????????????????????1992????????????????????

????????????????????????????????2025?1????????????2????1????????????????????????????
????????????????????????????????IRA??
????????????????????????????????????

????COP??
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??4????????

COP28????????????????COP29????????NCQG????????????????COP30????????
?GGA????COP29????????????????UAE????????????2?COP????????????COP?
????????????

????????COP????????????????COP????????4????????????
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????????1????9?1????????????????????????????????????
????????2?1????????????????????????????????

??9?1????????????????COP29????????????NCQ
G????????9?1????????????????????????????????

????????NCQG????2030????3????????????NCQG????????????????

????????2????????????????????????EU????????CBAM????????????????
????????????????????????????????????CBAM????????????????EU????
????WTO????????????????

6????????????2????????????????????2????????????COP30??
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????????1.5????????????2????COP30????????1.5????????
????NDC????????????EU?NDC????????????

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??4????
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4??
????????COP30????????????????

????????????????????????????????11?6?7????????????????over
come dependence on fossil fuels????????????^{1?}????????

????EU????????83???1.5????????????^{2?}COP28????????
????????LMDC????

1????????17????????18????????????????Global
Mutirão: Uniting humanity in a global mobilization against climate
change????????^{3?}

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????????9?1????????????????????????????
????????NDC????????NDC????BTR????????
????????progressively overcome dependency on fossil fuels?
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????????21????????????

????^{4?}

4????????

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- ???NCQG????????????????????????????????
- ???????2????????????9????????9?1????????????
- 2035????????2025????3??

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- ???
- 64?2026?6??66?2027?6??68?2028?6????????????WTO?UNCTAD?ITC????????????????
????????2028??
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?1.5??NDC???

- CMA7?2025??CMA8?2026??Global
Implementation
Accelerator????????UAE????????????????????????????????????COP????????1.5????
????????????????????NDC?NAP????????????SB64?2026?6??SB65?2026?11????????
????????????????2026????????????????????????
- CMA6?CMA7?CMA8????????1.5?????????????.????????NDC??NAP????????????
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- ????

????EU??No deal is better than bad
deal???21????????????????????

??10????COP????????????????23????????
????????21????????????????????^{25?}

????????????????????????COP????????????????????????????????I see no
objection????????????????????????????????????^{26?}

??2030????????????
????????????COP31????????????

????????????????Point of Order????????????

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COP30???

COP30????????????????????2023??COP28????????????GST????28????
????8????????????????????????????????

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??overcome dependency on fossil
fuels??COP28????????????????????????????
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????????????????????????????????????COP????????????????

??GIA????????????????UAE????????????
????????????????????1.5??

??COP????????????

??COP??affordability????
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AI??energy transition????????????energy
addition??

???11????????????????????????????????ADIPEC????????COP28????????????????????????????AD
NOC????????????1.5????2050??

ADIPEC??
????????????????COP??

???2021??
????????????????????

???COP????????????????????????????????????9?1????????????2035????3????????????
????????????????NDC??
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????????????COP29?NCQG????????????????????COP30????????????????
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1.5????????????????????????????????1.5????????????

????2028????2????????????????1.5????????

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⁸⁸????????????

????????????????1.5????????????????????????????????

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- ?1?Speech by President Lula at the opening of the COP30 Leaders’ Summit in Belém, Pará
- ?2?83 Countries Join Call to End Fossil Fuels at COP30
- ?3?https://unfccc.int/sites/default/files/resource/DT_-cop30-01.pdf
- ?4?https://unfccc.int/sites/default/files/resource/Mutir%C3%A3o_cop30.pdf
- ?5?https://unfccc.int/sites/default/files/resource/cma2025_L24_adv.pdf
- ?6?COP30: Closing Ceremony | UN Climate Change
- ?7?UAE’s Sultan Al Jaber Opens ADIPEC 2025 with Powerful Call for Pragmatic Energy Policies | AQ1B
- ?8?Three tough truths about climate

Posted in ???, ????? | No Comments »

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?? ? · Thursday, November 27th, 2025



CHUNYIP WONG/iStock



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????????????TOKYO H2???????

????????????2030????????????600????????????????????????????9????????????
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<https://agora-web.jp/archives/250916072423.html>

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24????20??——?????“????”

??1?
????????????10?23????????????????????????????????????24????20????????????

????????????20????????24????????1????????????????????????????????
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??24??1????
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??10????????????1???1200????????????420????????1????10????40?
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??CO2?????????

??CO2????????????
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??INPEX????????????????CO2????????????????????????????

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????????????????????????60????60????????0.6×0.6?0.36??36????????40????
??24????????1/4?1/3????????

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????????7????????????????8????3????7????1????

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<https://agora-web.jp/archives/250713110320.html>

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??2016??pdf??????

The Feasibility of a “Hydrogen Society”

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????????CO2????????????????????????????????CO2????????????????????????????????????
????????CO2H2O??

Posted in ??????????, ??? | [No Comments »](#)

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?? ?? · Thursday, November 27th, 2025



Khanchit Khirisutchalual/iStock

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COP30??
????????????????????????????????????

• CO????????????

CO????????????????????

????CO????????????????????????????????????

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

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

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????Carbon Symbiosis?——????

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???CO????????????????????????????

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COP30??

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CO??“??”????????????????????

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- CO????????????????
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???COP30??

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COP30??

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

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?? ?? · Wednesday, November 26th, 2025



sommart/iStock

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??2012????????
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2050??100????????????????????
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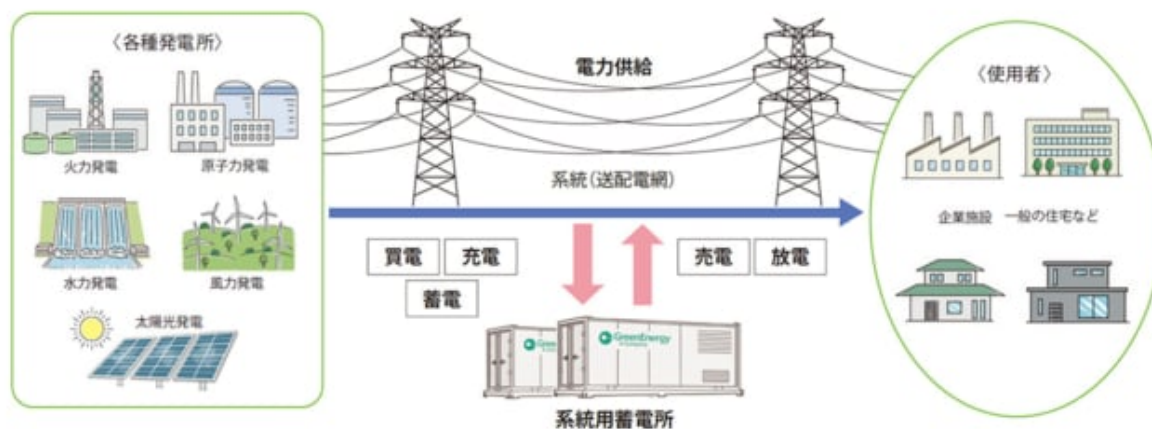
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??NAS????????????????
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[illegible]

<https://green-energy.co.jp/service/gxpack-message/>

[illegible]

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©???????

??????2012????????18??
????????????????????2050????????????????????????????????????

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2024?3?27????????????????????????????????????



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https://www.pveye.jp/eye_sight/view/5101/

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????????????????????????2025????????1kWh??3.98??

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

CO???????????? COP30??????????

?? ?? · Wednesday, November 26th, 2025



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2025?11??30????????????COP30??
????COP30??
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1. CO????????????????

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??CO????????????????????????????????CO????????????????????????
???CO??

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

????????CO??
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????????EV??
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????2050??2050????????????
??CBAM????????????????

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

COP????????????????????????????????

??
????CO????????????????????????????

4. ?????????Carbon Symbiosis????

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5. ??????????—????



COP30

HP??

8 EU CBAM

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

<https://agora-web.jp/archives/250828061947.html>

[illegible]

?????EU??CBAM????????????????????????????9????????????????

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?????????EU??????CBAM?????????

<https://agora-web.jp/archives/251005092737.html>

EU2026?1?1????????????????????????????????CBAM????????????????????????

10.12.2025



Leestat/iStock

?????????????????????Ronald Stein???4????????????????????????????????????Armando
Cavanha???????

The true source of civilization's future is energy wisdom

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[illegible]

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[illegible][illegible][illegible]

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??Energy Wisdom????

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Balance????????????????“?????”????????????

Posted in ??????????, ??? | [No Comments »](#)

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??? ?? · Wednesday, November 19th, 2025



wragg/iStock

Do Markets Reduce Prices? Evidence from the U.S. Electricity Sector
Why Are Energy Prices So High? Some Experts Blame Deregulation.

1990

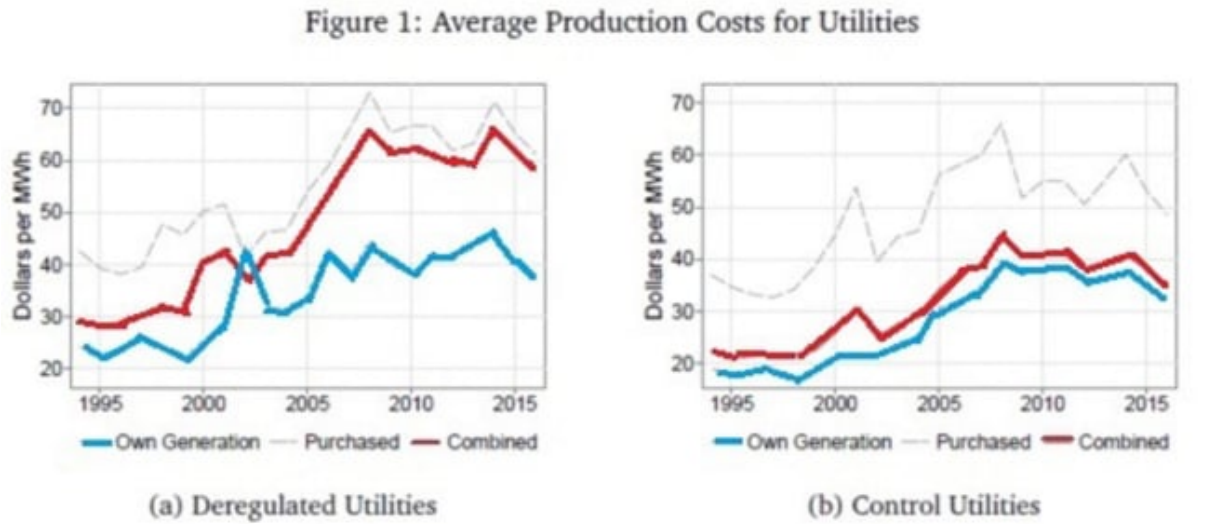
2004 2008

2016 25

16 25 4

50 16 4 kWh

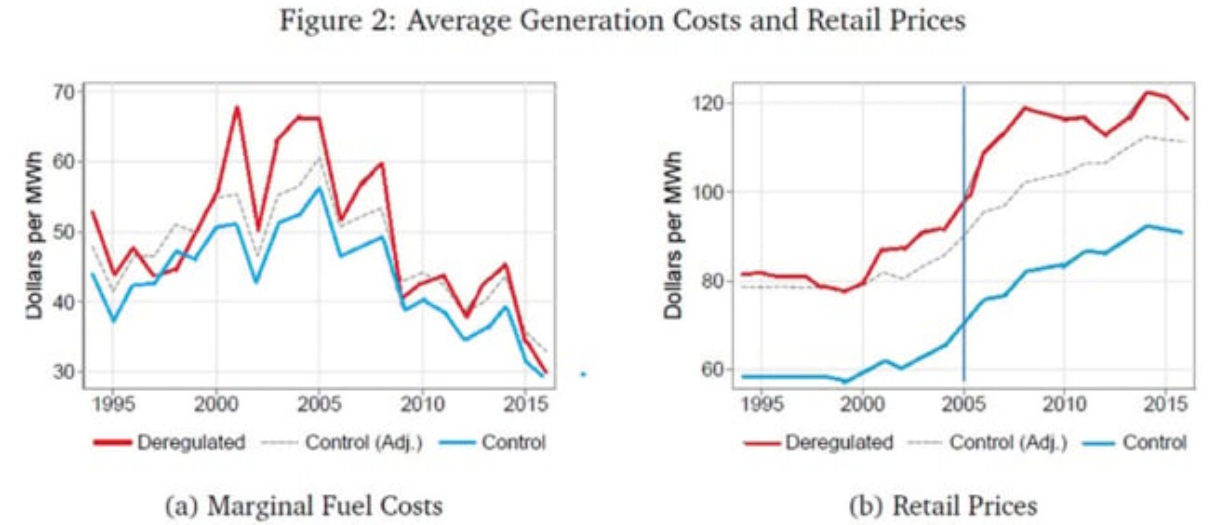
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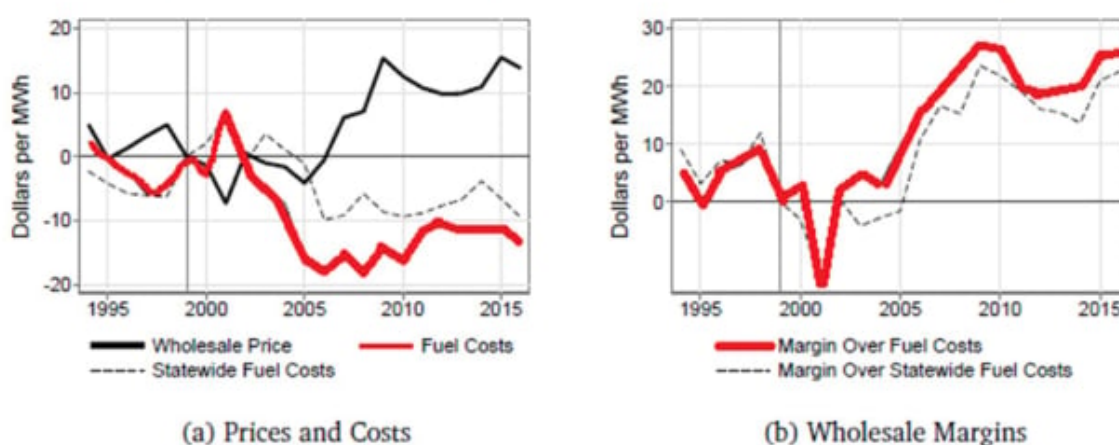
2000 a b

2 a b



[illegible]

Figure 4: Estimates of Changes in Prices, Costs, and Wholesale Margins

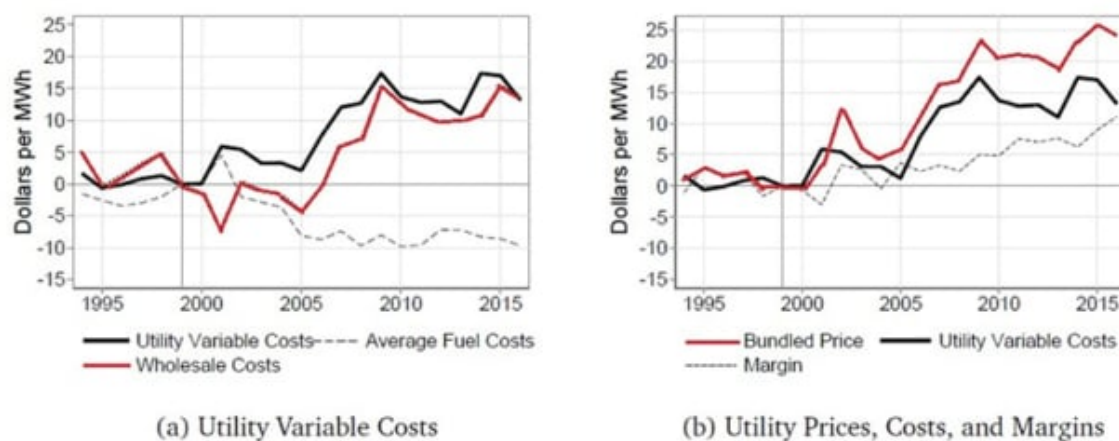


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Variable	Bundled
Cost	
Price	

Figure 5: Estimates of Changes in Utility Costs and Margins



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?? ?? · Saturday, November 15th, 2025

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Mark Carney’s Shift From Climate-Change Warrior to Fossil-Fuel Cheerleader

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2024?6????????????????GFANZ?NZBA??
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Gemini??

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Scaling Voluntary Carbon Markets?TS-VCM??????????

TS-VCM?2021????????????Integrity Council for the Voluntary Carbon Markets?IC-
VCM????????????IC-VCM????????????????????????????????

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Gemini?????????????????IC-VCM (Integrity Council for the Voluntary Carbon
Market) ????? Core Carbon Principles (CCPs)
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Gemini?????????????IC-
VCM?CCPs??
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???2021?11????????????????26????COP26????????????????????Glasgo

w Financial Alliance for Net Zero?GFANZ??????????

GFANZ????????????NZBA?NZAMI??2024
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??????BBC??????????????????

?? ?? · Friday, November 14th, 2025



oatawa/iStock

BBC????????????????????????2021?1?6????????????????????????????????????

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BC????????????Director General????????CEO??????

??BBC??100????????????
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The BBC Can’t Be Reformed – Its Purpose is Propaganda and Disinformation

The BBC’s Top 50 Pieces of Climate Misinformation

The BBC’s Top 50 Pieces of Climate Misinformation – Part 2

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?? ?? ? · Thursday, November 13th, 2025



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?? ?? · Thursday, November 13th, 2025



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[Gates Foundation??](#)

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[????????????????????COP30?? | ????](#)



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Bill Gates’s Climate U-Turn: Real Epiphany or Expedient Pivot? – Watts Up With That?

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Bill Gates Delivers ‘Tough Truths’ on Climate Just Before Big U.N. Talks – Newsweek

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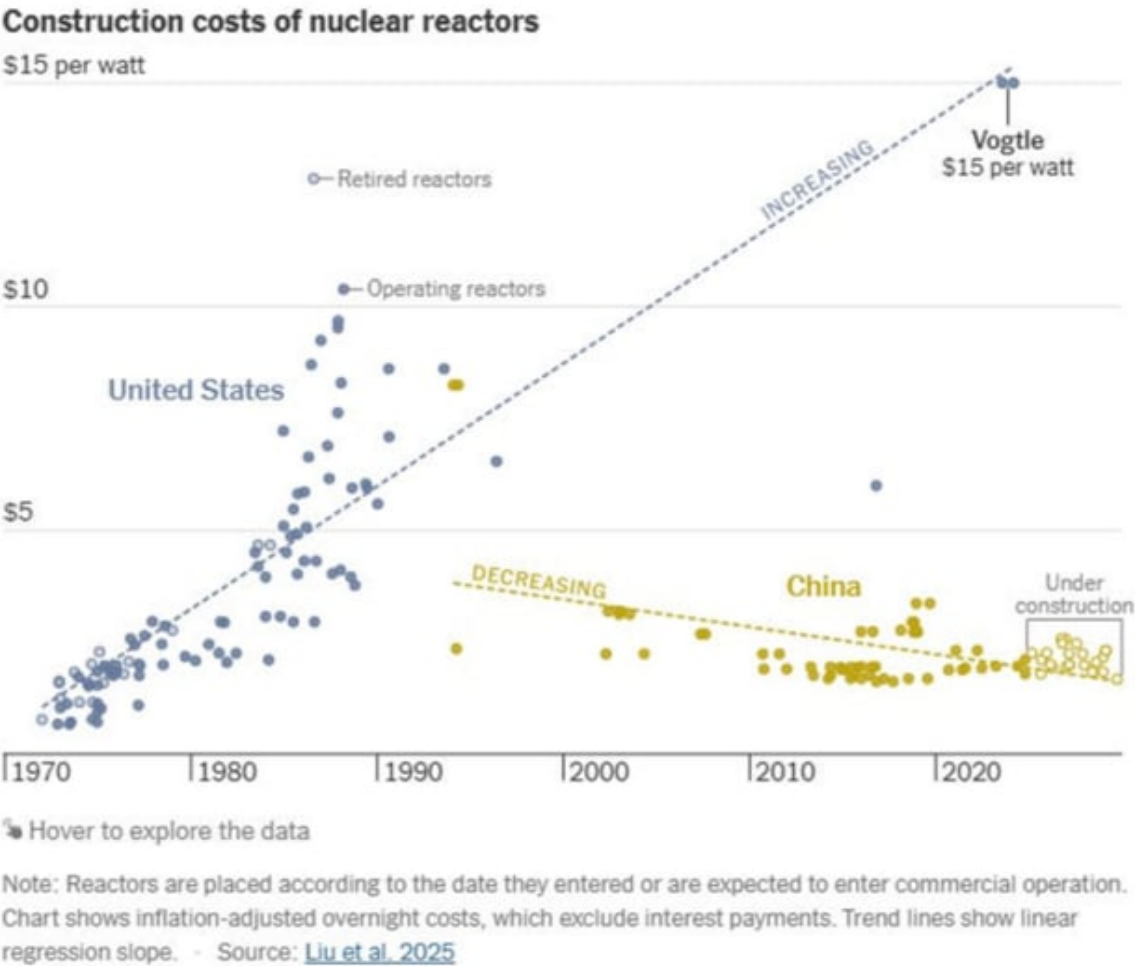
?? ?? · Wednesday, November 12th, 2025



Sunshine Seeds/iStock

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150????100????????2400????3870????

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

COP30????????????????4????????

?? ?? · Wednesday, November 12th, 2025



ConceptualArt/iStock

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COP30?????2035?????????4???????????

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Symbiosis????

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?? ?? · Tuesday, November 11th, 2025



Viktor Sidorov/iStock

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?? ?? · Saturday, November 8th, 2025



JoeDunckley/iStock

?HSBC????2030????????????????2????????????????????????????????????

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HSBC?2030??
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HSBC softens near-term emissions targets for polluting sectors

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日本で報じられない脱炭素関連のニュース

企業による脱炭素目標撤回

51/62



英HSBCは2030年までに事業全体で炭素排出量を実質ゼロにするという目標を断念すると発表した。世界最大の金融機関が気候変動対策の公約を撤回しているとして活動家らの間で懸念が高まっている。

2025年2月20日付Reuters (アクセス日: 2025年9月28日)



フットウェアブランドのクロックス社は、絶対排出量が前年比45.5%増加したことを受け、ネットゼロ目標を2030年から2040年に延期した。

2023年5月3日付edie (アクセス日: 2025年9月28日)



フィンエアーは、カーボンニュートラル達成の長期目標を延期し、これまでの2045年という野心ではなく、2050年を期限とした。

2024年10月30日付FlightGlobal (アクセス日: 2025年9月28日)



フィンエアーのトルッカ・クワシストCEOは、2033年までの10年間で排出量単位を約3分の1 (34.5%) 削減するという航空会社の短期計画がSBTiによって承認されたことを強調している。これは絶対排出量の約13%削減に相当する。

2024年10月30日付FlightGlobal (アクセス日: 2025年9月28日)



ラルフ ローレンは、2040年のネットゼロ目標を撤回し、5年ごとの温室効果ガス削減マイルストーンを設定する予定です。

2025年10月2日付RalphLorenz.com (アクセス日: 2025年10月5日)

ESG・脱炭素に邁進したあけくハシゴを外される日本企業はどうするのか?



藤枝 一也

素材メーカー 環境・CSR担当

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?SDGs????????

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

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?? ?? · Saturday, November 1st, 2025



digitalmazdoor digitalmazdoor/iStock

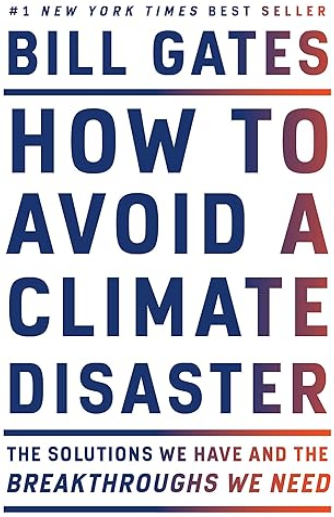
10?30???Daily Mail Online???Trump celebrates winning ‘war’ on climate change after Bill Gates admits he was ‘completely WRONG’????????????

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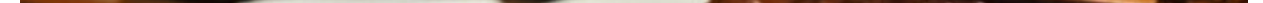
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Daily Mail Online??

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?? ?? · Thursday, October 30th, 2025



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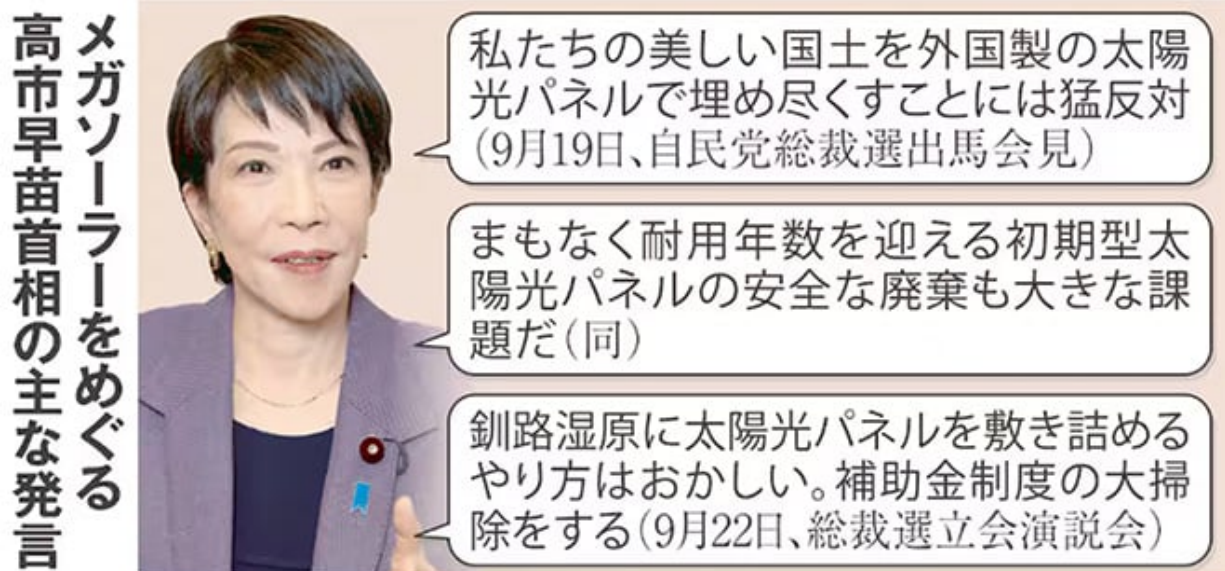
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Dialogue??VLS????????
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COP30????????????????????????????

?? ?? · Thursday, October 30th, 2025



Maoriphotography/iStock

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COP30????????????????America Out Loud??Ron Stein????????????????

Green delusionists attending COP30 are clueless of their renewable idealism

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?? ? · Friday, October 24th, 2025



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Posted in ?????????, ??? | [No Comments »](#)

????????????????????“Climate Change Forever”

?? ?? · Thursday, October 23rd, 2025



Cimmerian/iStock

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Willie                      Soon??                      “Climate                      Change                      Forever”  
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?? ?? ? · Wednesday, October 22nd, 2025

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Global Energy Policy Research | GEPR

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