Global Energy Policy Research | GEPR

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

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

?? ?? · Tuesday, September 29th, 2026

???????????????????????????2026???8????????? ???????????????????????????????????????4??????????????????5???????

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

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

2020?11??????????2??????????2024?11?????????????NUMO??????????????????????????????????????? ???[?1?]?

????2000???????????????????????????2020???[?2?]????????
??

??[?3?]?????????????????????????
2???

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

????2024?6???[?4?]????????
???????????????

??????2026?7??????????????????????????1994???[?5?]????
????5G??[?6?]?

???[?6?]???????????????????????????????
????????[?7?]???[?4?]?

??
?????[?7?]???????????????????????????????????

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

2026?3?????????????????????????????5?20?????????[?8??9?]???
??[?8?]?

??
??

???1900?????????????????????????????????1.5???????????????
??

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

8?31??????????????????????????????????????2???
???????????????????????????????????[?10?]?

??

???????????????????????????[?11?]?9?18??[?12?]??
???

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

?????????NUMO???5???????????????????????
??2023?????????????2026?3?????317???????????
??[?9?]?????????????

????????2??3??

??

???NUMO???——??

????

?1???????????2?????????????? ?????????2024?11?22??
?2?????????????????????????????????????2020?11?27?????????????
?3?????? ?????????? ??????????????2026?9??
?4????????????????????2026?8?7??
?5?????????????????????????2026?5?14??
?6??????????????????????????????2026?7?27??
?7?????????????????????????2026?7?26??
?8?JBpress????????????????????????????????2026?7??
?9???????????????????????????2026?7??
?10?????????????????? ?????????2026?8?31??
?11??????????????????????????????????2026?9??
?12?ABEMA TIMES?????? ???????????2026?9??

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

E-ledgers??????????????????

?? ?? · Monday, September 28th, 2026

?????????????????????? E-ledgers????????

???E-ledgers/E-liability??100%????????????????????1???

E-ledgers???CBAM????????EU-ETS??????????????????EU???

????????????????EU??????????????????????????????????????E-ledgers?????????????????????????????…??

???EU-ETS?2005????????????????????????????????????EU???

2026?????????CBAM???????????????EU??CBAM?????????????????????????????????

EU???2025?11????????????COP30?CBAM??

???????????????????????????????????E-ledgers??**????????????**??????????????????????????????????

???????E-ledgers???

?????????????CBAM????????????????????

???????????ISSB????????SSBJ????????3???

? ? E -
ledgers?????????????????????????????????????SDGs?ESG?????3?????????????????????????????????
??

????????

??????
?????3?????????????E-ledgers?E-liability???
??????????????????? E-ledgers???????

?

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

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

?? ?? · Saturday, September 26th, 2026

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

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

??????????

??AI?

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

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

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

???

????——?????????

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

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

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

??
??????????????????CO_2???
????

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

??????——???????????

???

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

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

??
??????

???

AI——??????????

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

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

?????

??

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

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

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

???

??
??

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

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

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

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

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

??
??

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

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

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

??
??

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

Posted in ???, ????? | No Comments »

COP????????S&P????????2060???????

?? ? · Thursday, September 24th, 2026

2026?9????????????????????????????????S&P????????????????????????Multidimensional Global Energy Pathways?????????????

S&P??

> - ?????????????10???2026???
> - AI??EMDE???
> - ??????????????????????EMDE??EMDE???
> - ??

?????????????????IEA?NZE????????1.5??2050??EMDE????????????????????????????3?????Pathways????????

- **Current Realities Pathway?CRP??**?????????????EMDE????????????????affordability??????????????????????????????????????

- **Emissions Reduction Pathway?ERP??**??credible?????????????
- **Diverging Priorities Pathway?DPP??**???????ERP?????????????EMDE?CRP?????????????????????????

????????????2060?????????????????????????????????????

?????????????????????????EMDE????

2060??????????????????EMDE???????????????????????????60????????????????1?????????????????

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

???2060??

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

??????????????????????????????????????2060??50?60??????????????????????????????2060?????????????50?????????????

??????????EPI??????????????????????????

???????????????????EPI???5??

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

????????GHG?????????????????????????2060???????????????????????????????????GHG??????????35???EMDE???????????????????????????????

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

???????????2???????????????????????????1.5??2.0????2.8???

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

> - ???
> - ???
> - ???

1.5????2050?????????????????????????????????????COP?????????????????????????????????????? ??????????????????????????ADIPEC?CERA??? ???????????

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

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

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

?????????????????? E-ledgers???????

?? ?? · Thursday, September 24th, 2026

????E-ledgers/E-liability???????????????

????3??????????????E-ledgers?E-liability???

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

E - ledgers??????????????????????????????????????CO2??? ??CO2??????????????

???……?????????????????????????????????CO2?????????E-ledger????????????????????????????????????

E-ledgers?????????????E-ledgers Institute?FAQ??????????????????????????????credible secondary data??

??? **??????????** ?????????1??????????? ??????????????????????????3??????????

??????????????????????????????????????100???E-ledgers???**???????????????????**?????????????

??

E-ledgers???

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

??????????????????????????**??????????????????????**?????????????????????????????????3???????????????????????????

????????

?

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

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

?? ?? · Wednesday, September 23rd, 2026

??????????????????????——???

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

???????????????????????????Professional Engineer??????????????????????

> ??????????????? useless ???????????????????????????????6000???????????????

???

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

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

??1929?????????????????????objective immortality??????

???

???????????????????????——?????????????????

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

???emergy, embodied energy??

???

??

???????

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

?????????????1??2????????????????????????????????

??????? useless ? valuable??

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

??

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

??

??

???——????????????——??

???——?????????????????????????——??????????????????????????

???CO??CO???

??

Posted in ???, ????? | No Comments »

????3?????????????E-ledgers?E-liability???

?? ?? · Monday, September 21st, 2026

E-ledgers Institute HP??

??????2026?4?????????????????3?????????????????????????????????**????3??????????????**??????
????

- ????3????????????CO2????Microsoft???????? | ??? ??????????
- ????????AI?????3???????? | ??? ??????????
- ?????????????????????3????????? | ??? ??????????

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

- ??????????????????100%?????????????????
- ???
- ???ESG???????????????????
- ???????????????????15???20??? ???????????????
- ??????????????????????CO2??????????????????

??????1???????????????1????????????????????????CO2?????????????100??????????????100?????? ??????????CO2????????????????????????????????CO2???????????????????

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

??3???????????????????????????????????**?E-ledgers???????E-liability???????**???????????????Robert Kaplan????????E-ledgers Institute???????????????????????????????????

E-ledgers

Institute??GHG??????????????3??

???E-ledgers???

??????????????CO2??????????????e-ledger??????????????????????????????????CO2???……?????????CO2??????????????????????????CO2?????????????????????????????

?????????????????????????????????????CO2???????????10???15???3??????????????????????????

??????????**????????????CO2????????1??????**???????????????????????????1????????????????????????????

Kaplan??????????????????????????accurate?????timely???????comparable???????auditable??????????????????????????

E-ledgers??????3???E-ledgers??????????????????????????

?

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

???2??AI?????????????????????

??? ?? · Sunday, September 20th, 2026

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

???????500MW??????2???????????AI?????????????????UAE?????????????????????????????????????

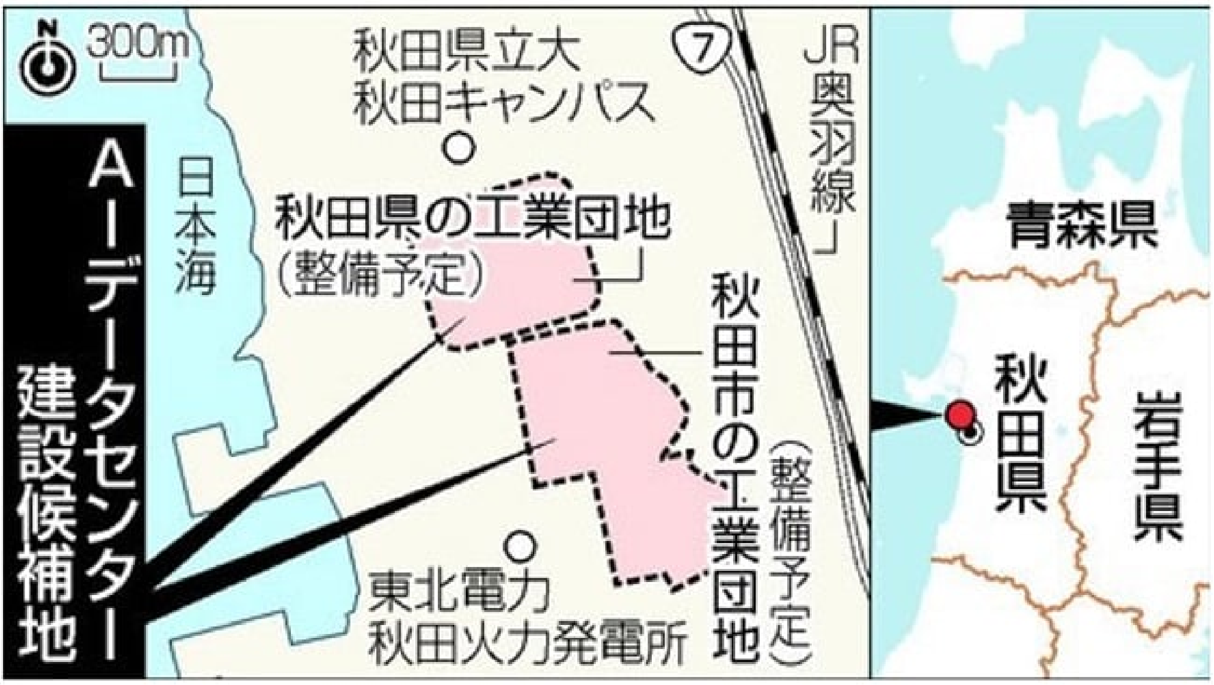
??????????AI????????????UAE????????????

???????????Bitgrit?????????????????????????????100%??????????AI????????????????

???

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

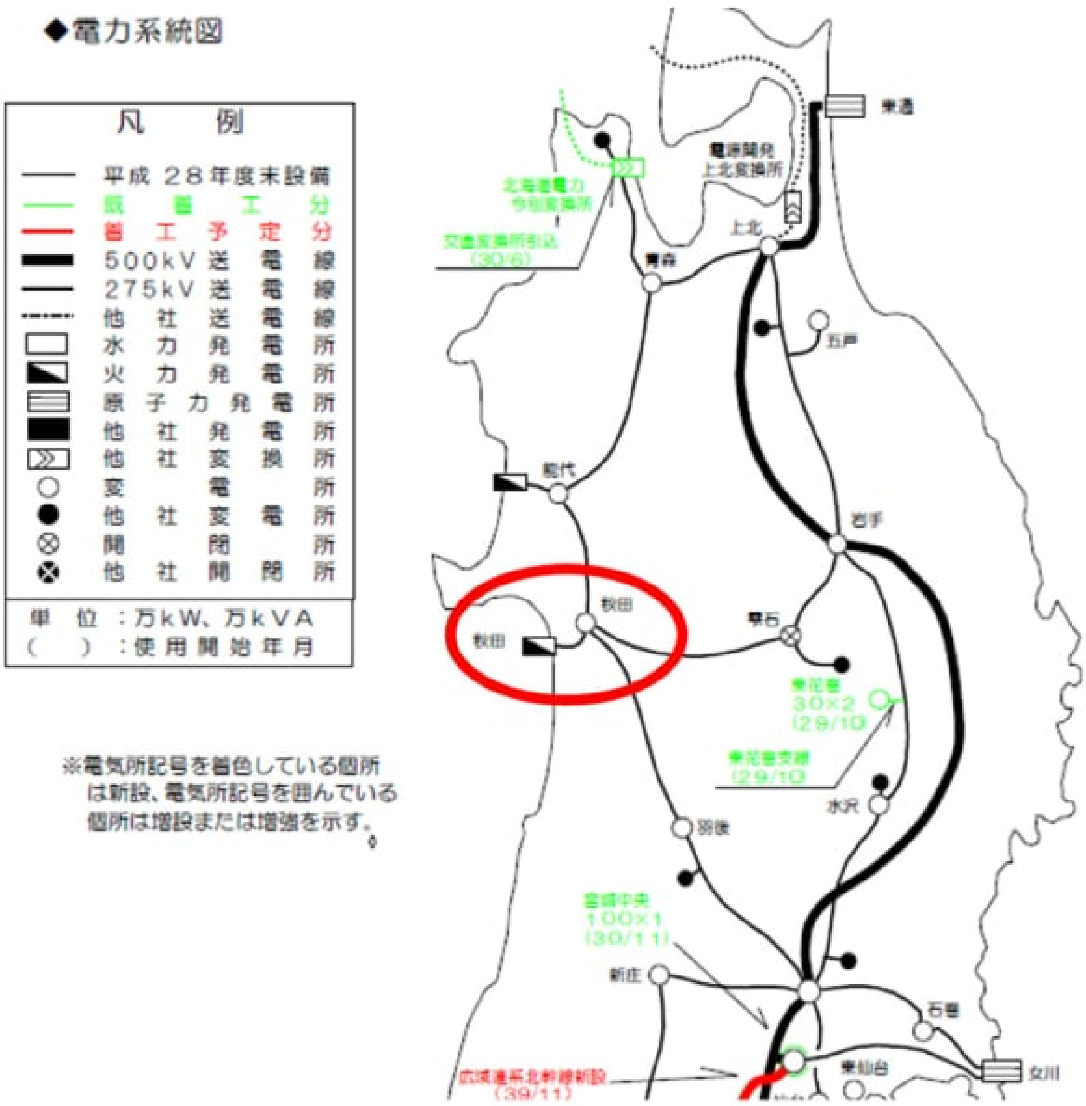
?????????????????????????1?????????????????????????????



?1?DC?????????????????????????
?????????

??????????3???4?????????950MW?????????????????????????40???????????????????????????????????
?????????????????????????????

?????2???????2017??
???????????????????????????????????3??
???????????????????????????????????



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

AI???

??????????????????????????????????????24??
????????????

??????????????????????????PPA???DC????????????
??????????????

???

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

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

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

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

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

?????????????????????AI?????????????????PR???????????

UAE?????????????AI?????

UAE??????????????????????????????UAE?????????????????AI?????????????????????????????????
????UAE???Aligned Data Centers??????G42?Khazna????AI?????????????????????????????????

UAE?AI?????????????????????????????????UAE???????????????????????????AI???????????????
AI?????????????????????????????AI???????????

??

??????DC????????????

??????????????????????????????????IT???????????UAE??????AI????Bitgrit???????IT?AI???????
??

?????????????????24??365????????????????GPU???UAE?
??????????????????????????????

???????????????DC????????????????????????????AI????????????????????????????DC??????????
????????????????GPU????????????????????

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

??DC???????????????????????
???

UAE???
???

??AI???????????????????????????????????
????????UAE???????????????????

???????????????????DC???????????????

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

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

?? ??? ?? · Saturday, September 19th, 2026

??
??

???

1987???“????”???????????????40????????
??

AfD??????????

9?6???????????????????AfD??????????????????????AfD??????????CDU??????????????????????
???????????

AfD?????????????????????????????AfD???????????AfD??????????????CDU??????????????????
????????AfD???

????????????????????????????????????AfD?????????????????????????CDU?????????AfD???????
???????????????????????????????????????AfD???????43.8???????????

AfD?????????

??????????CDU???AfD?????????????
????????????????????????AfD????????“??”?????????10????????????????????

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

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

???CDU????????????????????????????????????
???

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

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

???????????9?13??????????????AfD??????????????62??
?????????????

??????????4?????????????????????????AfD??
?

??
????????

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

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

???

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

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

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

?????????????????????????????????“??”??

??16??????????????????????????

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

??36???

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

?????????????????????????????????1990????????????????CDU/CSU??

?????2005??16?????12??????????????????CDU??AfD?????????????????????????????????????

?????????????????????????????CDU???????????13????????14???

???????AfD????????????????CDU?20???????????????????????????CDU?AfD???

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

??“????”?????AfD???

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

??“?????”??AfD??

??????????????????????????????????????AfD?????“?”?????????“??”???????????????????

AfD?????????6???9?12????????????AfD???
?????????????????????? ???????????AfD???????????????????????????????????

Posted in ???, ?? | No Comments »

Revisit???????????????????6???

?? ?? · Wednesday, September 16th, 2026

???——?

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

???

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

??6?????????**?Revisit?????**???????????
????????????????????????????????**??????**?????????????

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

??CO???????????????C??????????????????????

????????????????????????6?????????????92????????????CO?????????????????????????????????

??

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

???

2. ??????——??????????

???

??

?????????"?"???

???**Revisit**??

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

? ???????????——??????????????

??

??

???????????????????????1????????????260??——?????????

? ???????????——??????????????

??50%???????????????????????????DNA——??

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

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

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

? ??????????????——?????????

?????????????????——??"??"???????????????????????????

???——??"????"???????????????????????????

???6,000??

? ?????????????——???????????????

???

???

? ???????????——?????????????????

???

??

???

???

??CO??

? ???????????——??????????

??

???

??

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

???????????????????????????????——???

?????????????????????????????——CO??
??????????????????

???——???????????

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

???——???
????

???
??

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

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

?? ?? · Monday, September 14th, 2026

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

?????????????????????????????????????CDP?SBTi??
??

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

??	????	?????????????	??	???
2023?1?	??????25?????	????(DOL)?ESG????	???????????(ERISA)??/???????	?????????2023?1?26??????
2023?9?	???????22?????	NZFSPA?????	??????/????????	??????????2023?9?13??????
2024?1?	?????????	??????	?????????????????????????????? ??????????????	?????????2024?1?26??????
2024?6?	????????	CA100+?GFANZ?Ceres?????????	????????????/??	?????????2024?6?11??????
2024?11?	??????11?????	??????????????????????	????? ???	?????????2024?11?27??????
2025?1?	??????11?????	???????????????????JP???????????????????????????????????????	?ESG?DEI?????????????????????	?????????2025?1?23??????
2025?7?	?????????	CDP?SBTi	??????/????????	?????????2025?7?28??????
2025?8?	??????23?????	SBTi	??????/????????	?????????2025?8?8??????
2026?1?	??????6?????	Ceres	??????/???????? ?????????????????	?????????2026?1?21??????
2026?4?	???????23?????	????????????S&P?????	????? ??????/????????	??????????2026?4?22??????
2026?4?	?????????	ELI?Climate Judiciary Project	???????????????FDUTPA??	?????????2026?4?16??????
2026?4?	?????????	?????????????????????	????????????????????????????	?????????2026?4?21??????
2026?8?	???????16?????	?????EY?PwC?KPMG	???????? ?????	??????????2026?8?24??????

???Ceres??????????????????????????????BlackRock?State Street?Vanguard???????????CDP?SBTi?????????????????????????????????Fitch?Moody's?S&P?? ???????EY?PwC?KPMG????????????????????

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

???ESG??

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

??

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

??

???

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

?

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

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

?? ?? · Friday, September 11th, 2026

??

??????????????????????3????????? | ??? ??????????

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

????????

?????9?7??????????????????Modernising Corporate Reporting???

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

??

> ??????????????????????the strategic report has lost its way and has become too long, complicated and unfocused.?

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

??????????????ICAS?????

> ?????????????????????The annual report has evolved into a dumping ground for information?

???

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

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

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

????????????????????????????**????????????????????????**????????

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

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

???

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

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

?????

???

> ???

????????

?????

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

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

> ?????????????????????????????an excessive focus on compliance and a tick-box approach to reporting?

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

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

> ????????????????????????box-ticking???????????????????????????????????????more strategic interrogation of issues that generate company value????????

??????????

???box-ticking?????????

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

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

> ??

?????????

???

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

??????????????????????????CFD????????????????????????????

> ?????????CFD???????????????????

?????????

CFD??????????????2027???????????????????????ISSB?????????????????????????????2026?2???ISSB???????UK SRS?????????

??

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

????????????SEC??????3??????????????????CSRD/CSDDD?????????????????????????????????????3??

?????????????SSBJ??????????????????????????????????????**????????????????????????????????????**??

??

?

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

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

?? ?? · Thursday, September 10th, 2026

2026?????7??????????????????????????????8??????????????????????????????

???

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

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

??????????

??IPCC??

??

??????????

????????CO??

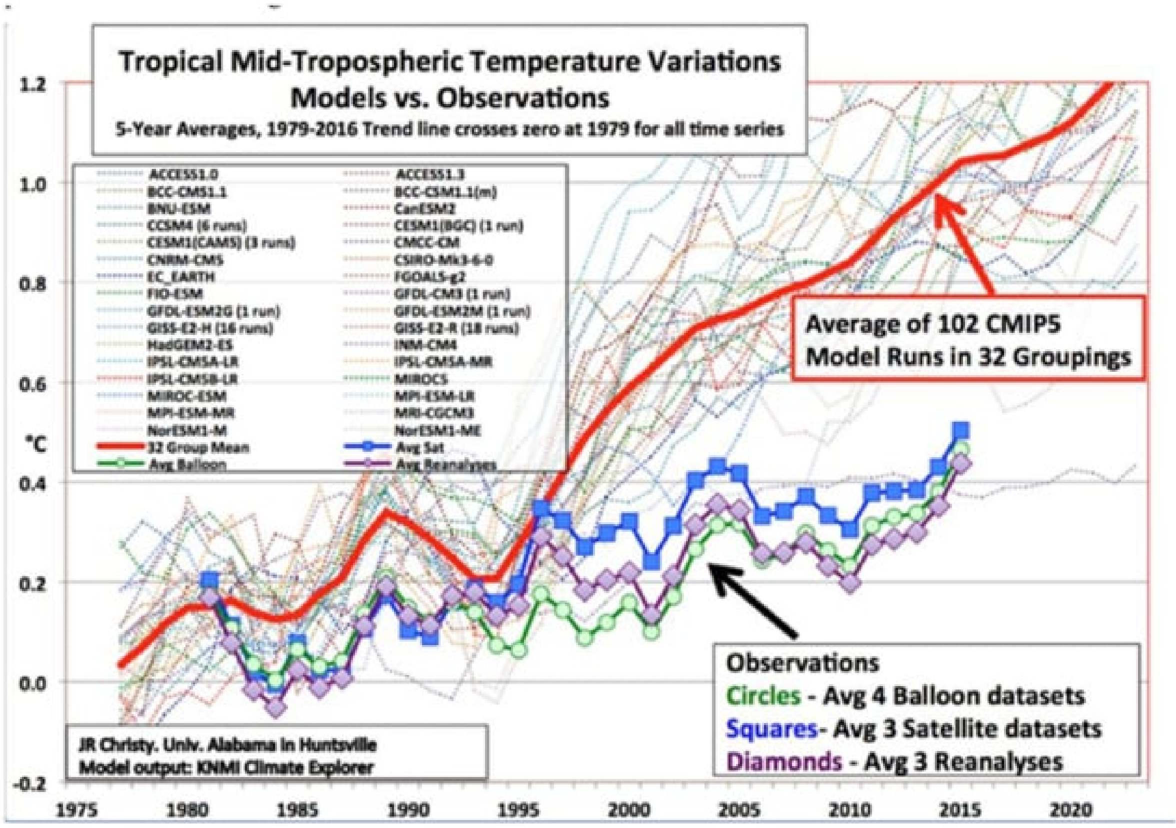
????????????????????????

2016???????????????????102???

??V&V?Verification and Validation??????????????????

??????????????????????????Verification???Validation?——??????——?????????????????????????????????

?????????????2050??2100???????????????????????????????????????



???Reto Knutti???

???????????

??

??

???????

??

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

??????????

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

??
??——???????????????????

??? ?

Posted in ???, ????? | No Comments »

???????8?????????????

?? ?? · Wednesday, September 9th, 2026

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

?????8??

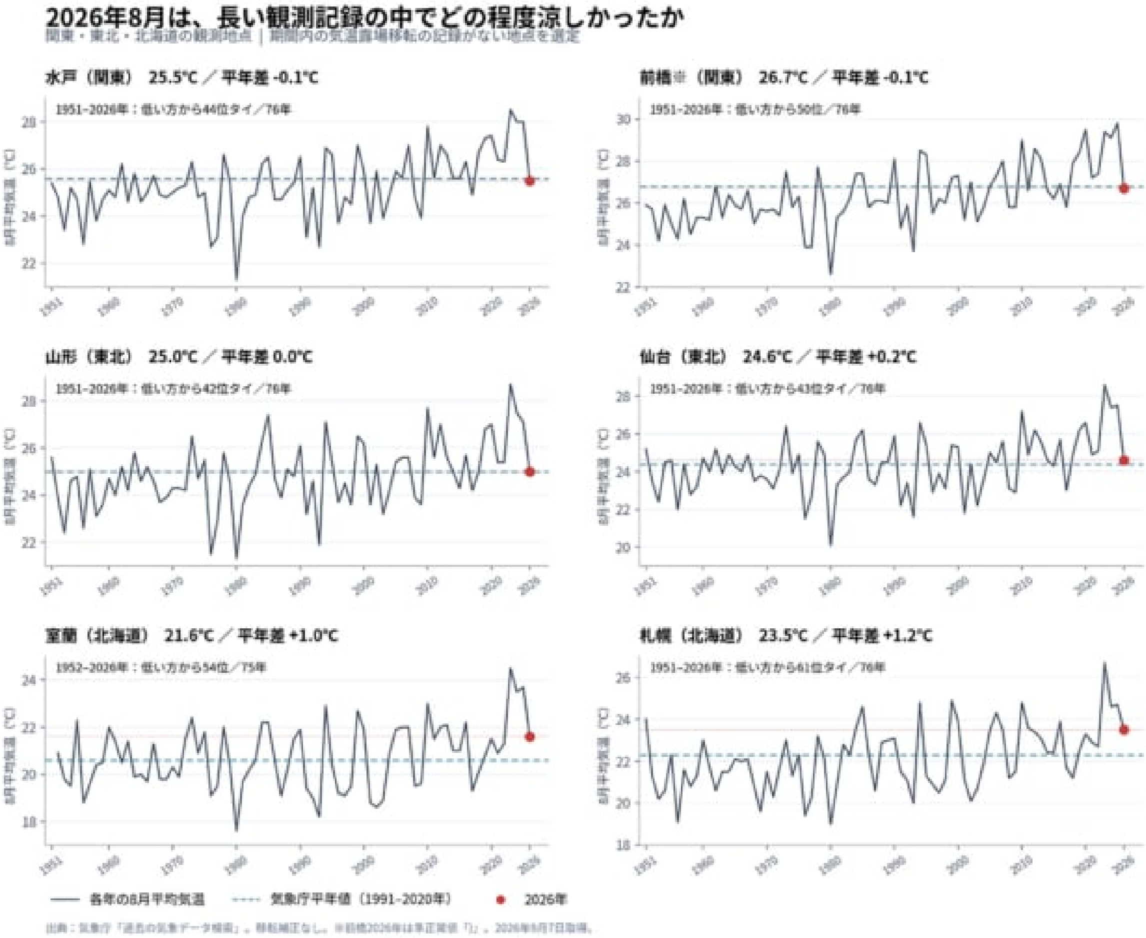
????????????????????1??????????6???????70???????8??????????????

????????????????8??????????10???????1.3?1.5??????????????2?3??????4?????2017???????8?????

??????????????????????????????4???
?????8???????????????

??

???



?1?6???8??????????
????????????????????????????2026?9?7??????????????????

????2026??????????????????4???????????????????????????2???????????

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

??????????32??????????2026?8?????????????????????????6???????

??
?????????1952?1?????????????????8???????????5???1951???????

??	2026?8? ????	?????	??10? ?????	???? ??????

??	2026?8? ????	?????	??10? ?????	???? ??????
??	25.5?	?0.1?	?1.5?	44??76?
??	26.7??	?0.1?	?1.4?	50??76?
??	25.0?	0.0?	?1.3?	42??76?
??	24.6?	?0.2?	?1.4?	43??76?
??	21.6?	?1.0?	?0.2?	54??75?
??	23.5?	?1.2?	?0.1?	61??76?

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

?????1991?2020????10??2016?2025???????2026????76??????75????????????1?????????????????
??????????2026????????????

???????8?????????????????????2026?8???
????????????????????????????

?

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

Posted in ???, ????? | No Comments »

?4.8?????????????? ?16?????????4????????

?? ?? · Monday, September 7th, 2026

?????16????????????EY?PwC?KPMG????????4??

2026?8?24????????????????????4??????????38???ESG????????????????????????????????????

????RCP8.5????????????

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

???????IPCC????????????????????????????????????RCP8.5??????

> RCP8.5?????IPCC?????????????????discarded?????????????????????????????????????

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

?????????PwC????????RCP8.5??

> PwC??Value in Motion: Methodology?????????????????
>
> ????
>
> PwC???ISSB??RCP8.5??

> ???????????????????????????????????NGFS????????????????????????????????????
> ????????????????????????

?RCP8.5????????????**???**????????????????????????????????????16??????**???**RCP8.5??????????
??

?????Nature????????????????

?????17?????????

> 2024??Nature?????????The economic commitment of climate change??

???
???????????????????**???????????????????????**???????????????????

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

?????23?28??????????????????

???4?TCFD?ISSB?NZFSPA???
???????

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

> ??

?????28???

> ??5??????????????????????ESG???
> ????????????

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

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

38??????????????????????????

???????????????????????????**?????????**???**???**
??????????????????

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

RCP8.5??????GFANZ?????????5???ESG?????????????????????????????????4??????????????????
???????????????????????????????????

???4?38???

????????????????????????2100????4.8?????????????18?RCP8.5????????????16????????4.8???????
????RCP8.5???

???17?Nature?????????????????NGFS????????
????16?????????????????????????????????????NGFS????????????????2025?12??????GPIF???U
FJ?????????????????

?????????????????????????ESG?????????????????????????16????????????????38?????????????
?????????????????

????
16?????????????4??????38???

?????????????38????????

1. **???????????**
   TCFD?ISSB?NZFSPA???
2. **TCFD????????**
   ?????????????????????????????TCFD?????????????????????????????????????
3. **ISSB????????**
   ISSB???
4. **????????????????**
   2020?????????????????????????ISSB?????????????????????????????
5. **??????????????**
   ?????????????ISSB?????????????????????????????????????
6. **???????????????????**
   ???
7. **???????????????????**
   ????????????????????NZFSPA???????????GAAP???????????????????
8. **SEC????????????????**
   ???SEC???????????????
9. **????1?2?3?????????**
   ????????????????1?2?3?????????????????????????
10. **??????????????????**
    ???
11. **???????????????????**
    TCFD?ISSB?NZFSPA???
12. **?????????????????**
    ???
13. **GFANZ?????????????????**
    130???????????GFANZ???
14. **GFANZ?????????**
    GFANZ???
15. **?????????????????????**
    TCFD?NZFSPA?ISSB???
16. **?????????????????**
    2020???

17. **?????Nature????????????**
    2024??Nature???The economic commitment of climate change??
18. **RCP8.5??????????**
    RCP8.5????????????IPCC???
19. **NZFSPA?????????????????**
    NZFSPA???
20. **UN PRI??????????????**
    UN PRI????????????????????????????????
21. **???ESG???????**
    2020???????ESG???
22. **?????????????????**
    TCFD?ISSB?NZFSPA???
23. **??????????????????????**
    ????????????????4???
24. **????????????**
    TCFD?NZFSPA?ISSB???
25. **??????????????**
    ???
26. **??????????????**
    ???
27. **?????ESG?????????????????????**
    ???
28. **ESG?????????**
    ??5?????????????????????????ESG???
29. **EY?????????????????????????????????????**
    ????????????????????TCFD?ISSB?NZFSPA???
30. **KPMG?????????????????**
    ???
31. **PwC?????????????????**
    ???
32. **?????????????????????**
    ?????????????????????????????TCFD?ISSB?NZFSPA?????????????????????????
33. **??????????????????????????**
    TCFD?ISSB?NZFSPA???
34. **??????????????????**
    ???
35. **???4?????????????????????????**
    ???4?????????????????????4???
36. **??????????????**
    2020???
37. **????????????????????????????????**
    ????????????????TCFD?ISSB?NZFSPA???
38. **????????????????????**
    ?????????????????????????????TCFD?ISSB?NZFSPA???

?

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

?16???????????????4?????????????????????

?? ?? · Sunday, September 6th, 2026

??16???????????
??????????????????????????4???????EY?PwC?KPMG????????????????????

?????4?????????????2023???22????????NZFSPA???

????2026?8?24??????????????????????????????4????????????????????

??????????

- **16???????????????**???????Mike Hilgers???????????????????????????16??????????????????????4??????????????
- **????????????????**???4?TCFD????????????????????NZFSPA??
- **????????????????**???4???
- **??????????????**??

??????

- **??????????**??
- **????????????????????**????????GAAP/PCAOB??independent of a materiality assessment???????1?2????????????
- **????????????????**???4?????ISSB??SEC?Hester Peirce????????????????????????stacking speculation on assumptions?????????
- **? ? ? ? ? ? ? ? ? ? ?** ? error avoidance???
- **???????UDAP?????**???4???UDAP????????????
- **38??????**TCFD?ISSB?NZFSPA?????GFANZ??????????????1?2?3?????????????????5???ESG????????????????????38?????????????????????????????

???38?????????????????????????????

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

????????????????????CSRD?????40?80?????????????????????????????CSRD??????9?????4??????????????????

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

?

??

??????

- **????????????????????????????????**
- **??11????????????????????**
- **??23??SBTi??????????????????**
- **??????CDP?SBTi?????????????????**

????????2023???????????ESG?????????????????????????

時期	実施主体	主な対象組織・イニシアチブ	主な疑い
2023年9月	ネブラスカほか22州	NZFSPAの署名機関	独占禁止法・消費者保護法違反
2024年6月	米下院司法委員会	CA100+、GFANZ、Ceres、ブラックロック等	気候カルテルによる共謀・談合
2024年11月	テキサスほか11州	ブラックロック、ステート・ストリート、バンガード	市場操作、共謀
2025年7月	フロリダ州司法長官	CDP、SBTi	独占禁止法・消費者保護法違反
2025年8月	アイオワほか23州	SBTi	独占禁止法・消費者保護法違反
2026年8月	ネブラスカほか16州	デロイト、EY、PwC、KPMG	独立性義務違反・利益相反

???

?

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

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

?? ?? · Saturday, September 5th, 2026

????????????3?????????CO2???

- **?????3?CO2??????? | ??? ??????????**
- **????????????3??????????????? | ??? ??????????**
- **????????????????????3?????????? | ??? ??????????**

????3??CO2????????????3??

????????????SEC??????3???CSRD/CSDDD????????????????????CSRD/CSDDD??????????????????????????????????????

??

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

???????????2026?8?24??

CO2???????????????????3????????????

??????2030?7?1???????1?2?3??3??????????

?Option 1a????????????????????????????????????
?Option 1b???????????2030??2035??????
?Option 1c????? 1?2???????????????????????3?????????????

??????Option

1c????????**????3????????????????????**?????????????????????????????**????1?2?????????????**
?????????????????????????

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

?????SMEs??????

?????????????????????????**???????????????????????????**??????????Boundaries????????????
????????????

? ?????????????**????3??????**?????????????????????????

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

??????**?????????????????????????**???

?
??×????????????????????????????????????
???

?????????????????Consultation paper??????????

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

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

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

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

???????KPMG??
? ?
??

???

?

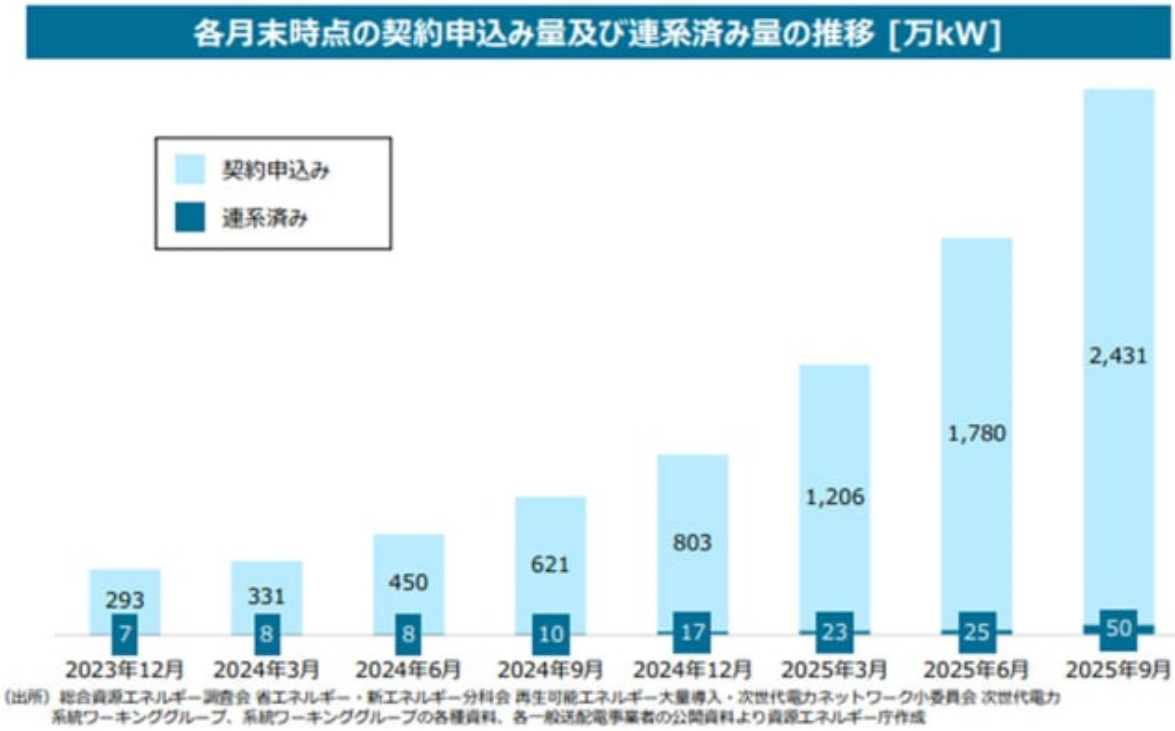
Posted in ???, ????, ????? | No Comments »

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

??? ?? · Friday, September 4th, 2026

????????

??????????????????1?????????????????????????????2025?9????????50?kW????????2,431?kW??????



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

????2026?8?17???2026?3???19 1GW?19,100?kW??????????

?? ??

?? ??

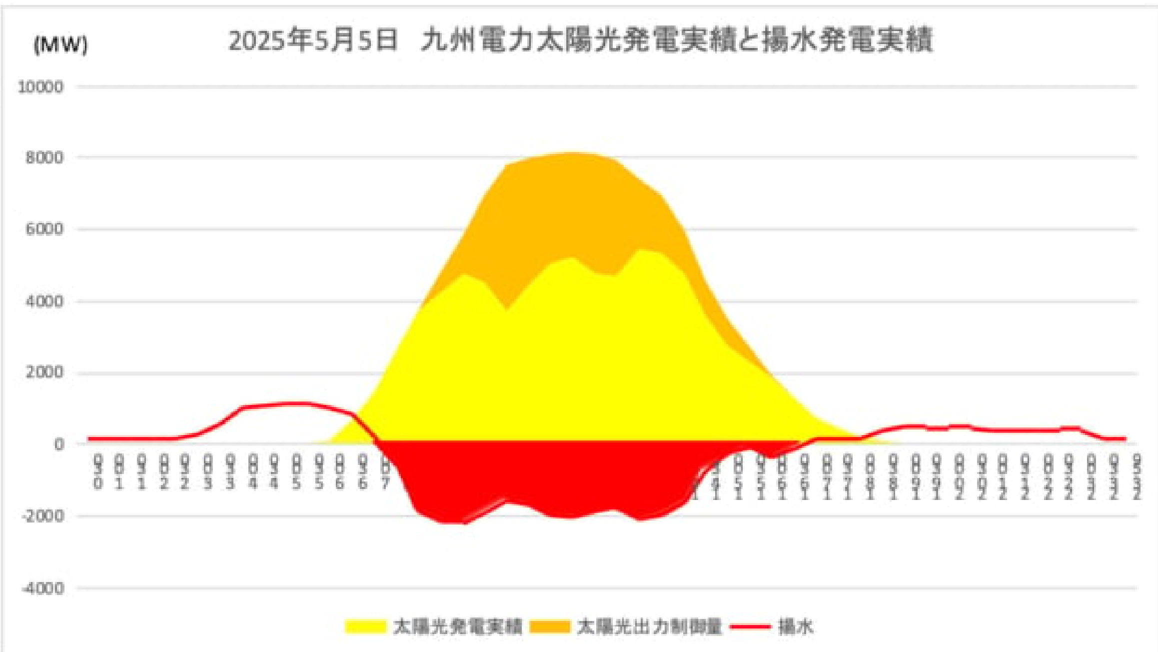
?? ??????????????????????????????????????

?? ??

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

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

1???2????????????????????



?2?2025?5?5?????????????????????

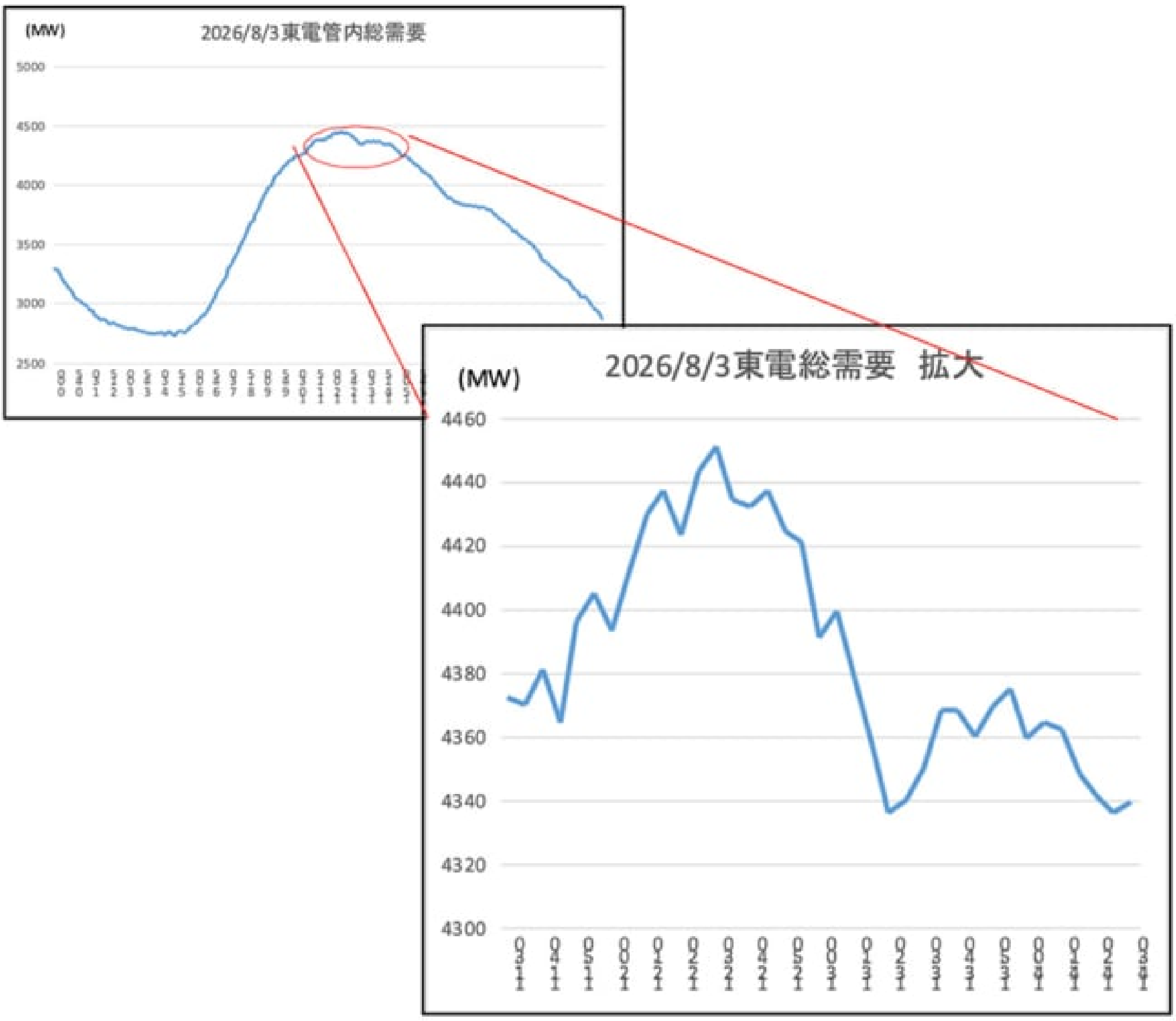
?2???7:30??????????? ???????????????????????????????????18:00??? ???

??????????????????????200?kW?7??

50?kW??????????????????????????4???

????????????2,431?kW???????????????kW???
???

??1??????????????????3?2026?8?3?????????????????????5?????????11:30?14:30????????????



?3?2026?8?3?????????????????

??????????????????????????12:30???
5????????????????????????????1????30????????????????????????????

???
??

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

??30????19.51?/?kW????????????????????????????????????
???

??????2026?3???????????????19.51??15??????????2026?9???10??????????????????????????????? ????????????????????????????????

??? ??

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

????????19.51??

??

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

???

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

???

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

???

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

????????????????????????????191GW?19,100?kW??

???

????19,100?kW????????????????????????????????19,100?kW???????????????????

?????????2026?6??41.6??/kW???????3.4????????0.7??/kW/????????????????

19,100?kW × 41.6??/kW = ?79.5???????

??? ???0.7??/kW?????????19,100?kW???

191,000,000kW × 7,000?/kW/? = ??1.34???????

???????79.5???20????????????5%??????????????????8.0%????

79.5?? × 8.0% ? ?6.4????

????????

? + ? = ?7.7??

?????

?????????????????????????????????191GW???7.7 ??????

??

????????7.7???

?????????2024?????????????????????????7,707?kWh?

???????

7.7?? ÷ 7,707?kWh ? 10.0?/kWh

????

2024??????????3.49?/kWh???

????191GW?? OCCTO???????????????????

???

?1???2???

	資源エネルギー庁資料 系統WG 2030年度導入見通し	資源エネルギー庁資料 分散型エネルギー推進戦略(WG) 2040年度参考試算※3	OCCTOの将来需給シナリオ 2040年度参考試算	OCCTOの将来需給シナリオ 2050年度参考試算
設備容量	4.7~7.9GW ※1	2.8~10GW ※2	15.9~16.9GW ※2	21~24GW ※2
建設コスト	ー	3.6万円/kWh	11.2万円/kW	9.1万円/kW
運転維持コスト	ー	0.37万円/kW・年		

※1：累積14.1～23.8GWhを3時間容量と想定して筆者計算
※2：系統用蓄電池と需要地併設蓄電池を合算した数値
※3：複数シナリオの中でコストを最適化した場合のシナリオという位置づけ

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

	2025年9月現在実績 実績連系量	2025年9月現在実績 連系申込	2025年9月現在実績 接続検討申込
設備容量	0.5GW	24GW	191GW
建設コスト	41.6万円/kW ※4		
運転維持コスト	0.7万円/kW・年 ※4		

※4：資源エネルギー庁が第4回長期脱炭素電源オークションに向けて示したモデル値

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

???

??
??

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

1???
???

2???

??????????????????/kWh???
??????????????????????

??
????

??
??

??

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

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

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

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

?? ?? · Friday, September 4th, 2026

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

AI???

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

??????????????????????????singular point??????????????????????????????????bifurcation point??????????

???

??

??

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

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

???——???????????????????????????——???????????????????????????????????????

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

???

???——??????????????????????????????
???

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

???

??
??
???

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

??——????????????????????????
????????——???
???

????

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

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

Posted in IT?AI, ??? | No Comments »

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

?? ?? · Thursday, September 3rd, 2026

y-studio/iStock

??[?1?]?

??

??

????23.8??

????17??????62????????????2040????????????370??6??????????????????[?2?]??????????????????

??	2040????????????
????????	4.1??
???	6.2??
?????	4.2??
??????	1.0??
????	5.1??
GX????	3.2??
??	**23.8??**

??
??[?22?]?

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

???

?????GX??[?3?]????????????????????????????
?

???????????6.2???15?????????????JOGMEC
????????????15?????????????????????????[?4?]??????????3????????

???????????????????????15??????????????????????????

?????4.2???
???

GX????3.2??
??

???????????

??????????4.1???
??????????????????????????

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

??????5.1???
?3???????????????????????????????????????[?5?]?

??

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

?????????85.3???GX??????75.5????????????9.4????????????????????[?22?]?

???????????????????GDP???

??
???

???

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

??

???

??

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

??????

?1??????2026?9?1?? ????????????2026?9?1?????
?2?????2026?6?24?????17????????????????????????????8???????????5???????????????????1?1–2??2026?9?1?????
?3??????2024?2?14?????6?????????????????????????????????2024?2?????699???14–25??????16–17??2026?9?1?????
?4?????????????????????JOGMEC?????????????????????????????2026?9?1?????
?5?????????????2026?6?5?????????????????????????????????????2026?9?1?????

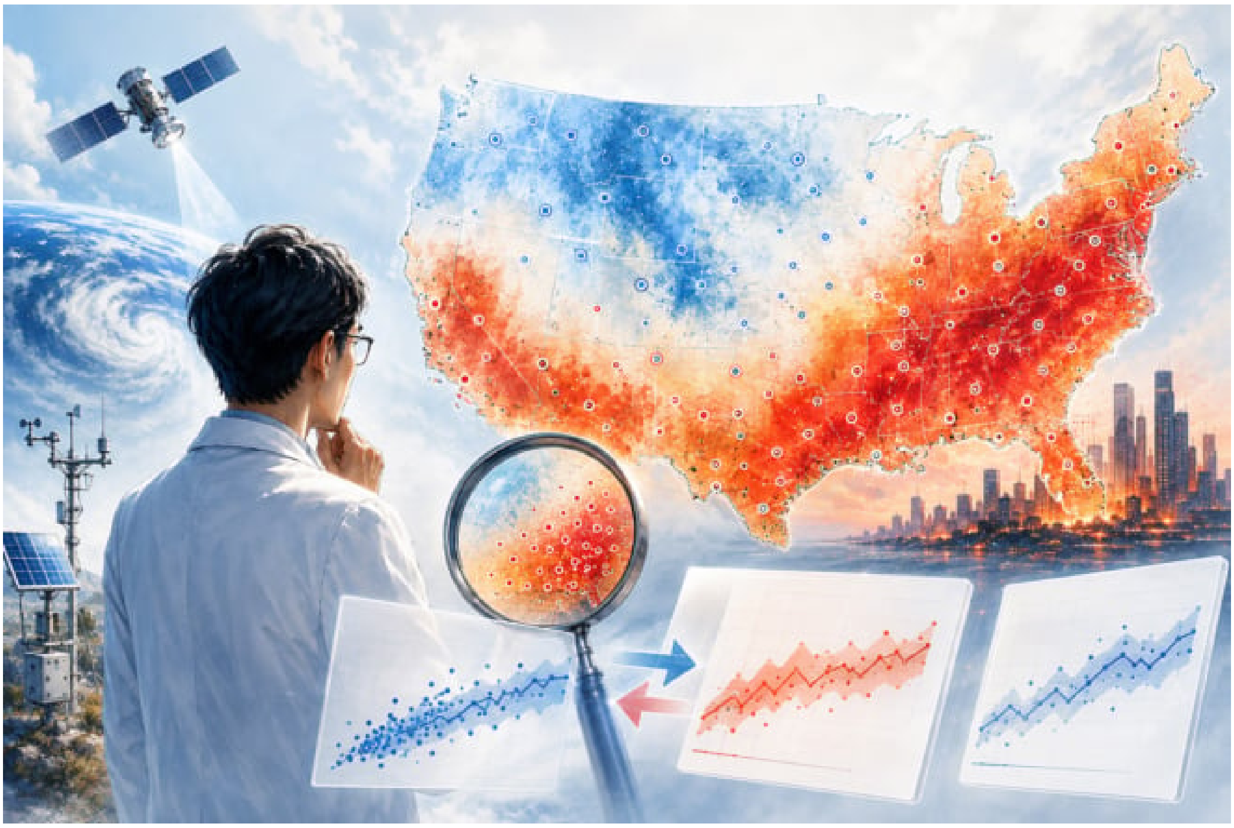
?

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

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

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

?? ?? · Thursday, September 3rd, 2026



?2026?7?????????????????????????????NOAA?????7????48?????????????????????????????

???

???

?????????

C O ?
Coalition??NOAA?????1???????????????????????????????????UHI??????????????????????????????
??USHCN?????????????????

?????2026?7??????????????7??????4????1901??1934??1936?????????????????????????CO?????????7
5???????

??
?????

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

???????????????RCP8.5?SSP5-8.5????????????????????????

RCP8.5?SSP5-8.5????
?????????????????

??

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

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

??????????????????????????????????8?????5????????NCA5??????RCP8.5?SSP5-8.5????????????
????Business as Usual???????????????????????

???
???????

??

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

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

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

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

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

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

??

????????

??

???

??

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

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

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

CO??

???

??

Posted in ???, ????? | No Comments »

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

?? ?? · Wednesday, September 2nd, 2026

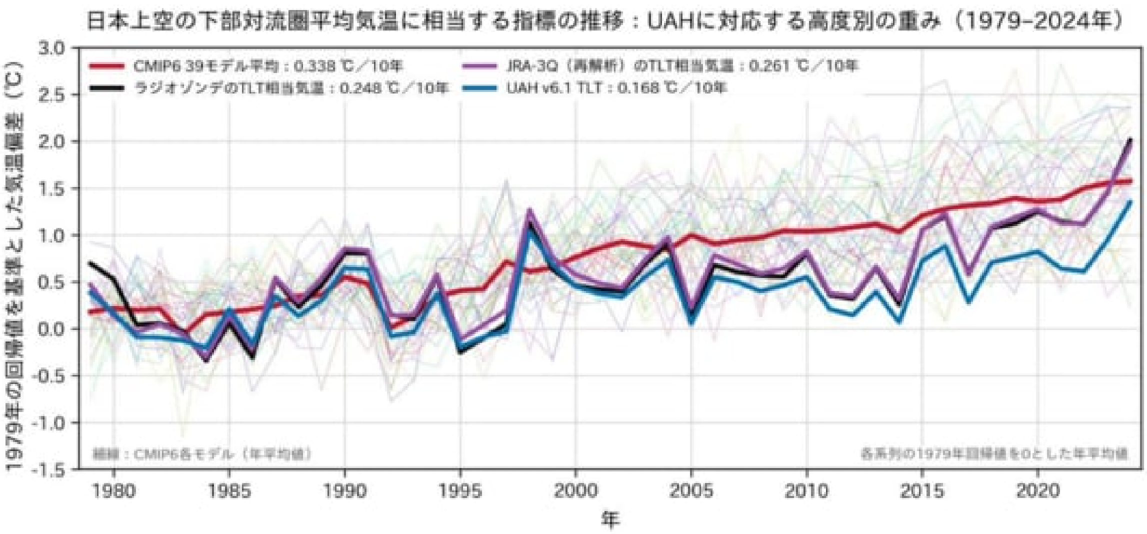
janiecbros/iStock

?????????????????????????9000m????????????IPCC??????CMIP6???????????UAH?????????????
????????????????????????????????????

???CIGS
WP???????CMIP6???

????????????13?????????????????????1979?2024??????39?CMIP6????UAH?v6.1??????????????
????????????

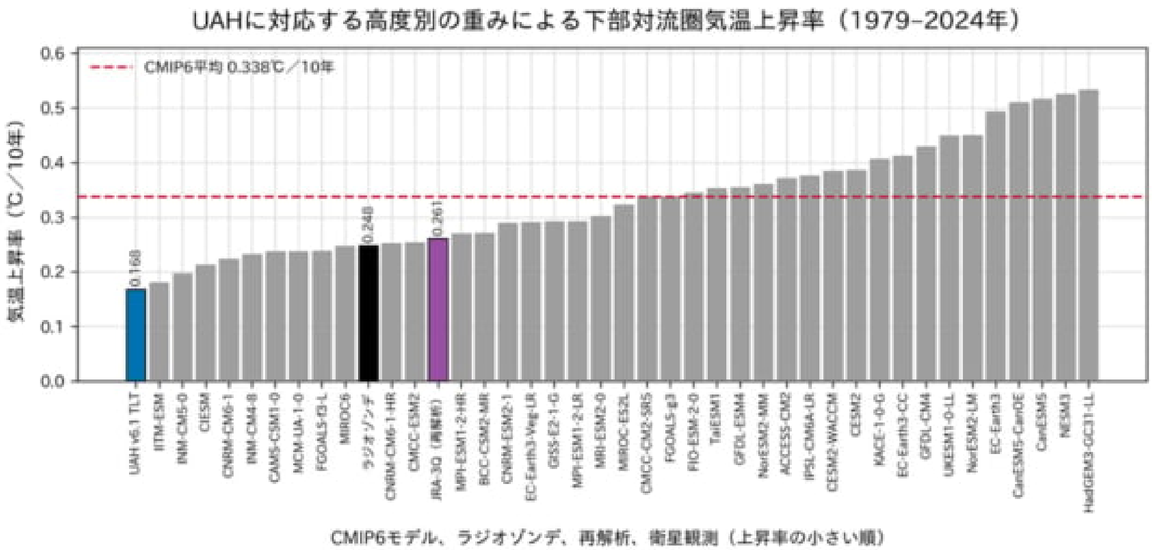
????1?????????????1979?????????????????????????39?????????????UAH?????????????????????
??46?????????????????????????????????



?1????????????????????????????????????CIGS WP?10??
????CMIP6?39????????????UAH????????

???????UAH?0.168??10?????????CMIP6?39??????0.338??10?????2?????

?2???????????????????????????UAH?????39?????????????????????????????NOAA STAR v5.0??????1981?2024??????0.196??10????????????0.347??10??????????



?2?????????????????????????????CIGS WP?11??
??????CMIP6????UAH???????????39??????

?????1????????UAH???????2?3??

?????1979?2024???

???
??

??

?

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

Posted in ???, ????? | No Comments »

???2028??????????3????????

?? ?? · Tuesday, September 1st, 2026

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

2028???
???

?????????????????????????????????16???????????????????????2??4???????????3???????????

??244??10???2?9,29
4???????????????????????????????????

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

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

?????????5??20????????????

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

?????????????2034???

???

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

???
?????

2028?????2034???

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

???????????26-018J???????????2028??????2034????

?

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

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

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

?? ?? · Monday, August 31st, 2026

???2030????????????????????????????????100%????????????RE100???

????AI???

????????????????Truth in Energy and Climate???

Big Tech Loved Green Energy–Until It Needed Reliable Power

???

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

??6????????????????20??2.7GW——?????2????????????2028???????????

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

??5GW??????????????????????????10??????7.
5GW??????????????????????????????????

??????????10????????RE100??
?2??????????????????????

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

???

AI?24??365??
???????????????????——???——??????????

???

????????

??

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

AI???

?????????????????——???
??

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

??????????????????????????????4??1????????????????????????????????59??????????90GW?????
??

???——??
?????——???

??????????2022???
??????????????????????????????????

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

?????????????——??????????????????20???
???????????????????

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

????????????????AI??
??——???

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

AI?????150??GX??????????????????????????

?? ?? · Saturday, August 29th, 2026

????????????????????150???????????GX???

?????????AI?Google?AI???AI??AI????????????????????

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

????????

??

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

??

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

??

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

????????????????????????10%?30%???1????????

??

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

???

???GX???

?????????????????????????????100%?????????????????????????????????????

??

150???GX?????????????

???GX??

??10???????????

??

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

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

??

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

??

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

EU??????????????1???????????????????

?? ?? · Friday, August 28th, 2026

2025?8?????EU??EU????????????
???????????????????????????????????

??????????EU????????????? | ??? ??????????

?????????EC?????????????????????????????????????CSDDD?????????????????CSRD???????????
???????????????????????????????

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

??

??????????????——????????

?ESG Today?????????????????????????U.S. Mission to the EU??EC???

?????EU??**???????????????????????????Take any actions necessary??**?????????????

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

??

ESG Today????????????????????EU??????????????????????????????????????

> - ??????CSDDD?CSRD????????????????????
> - EU??????????????????????????????????
> - ???
> - CSDDD?????????????????????????????????????

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

??

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

EU???
???…??

???EU??????????????????????ISSB????????????????????????????SSBJ??????????????????3????
???????????????3?????????CO2???????????????????????

??

???
??

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

??

?

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

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

?? ?? · Thursday, August 27th, 2026

FGorgun/iStock

???????????CO_2???
?????????CO_2???????????????????????????????CO_2????????????????????????

??????????6000K???
???300K??????????????????????????????0cm^{-1}???2500cm^{-1}??????????????????

??????????CO_2????????????????????????????????????CO_2?667cm^{-1}??????????????????????????
??CO_2?????????????????????????[?1??2?]?

??????????CO_2??N_2?O_2????????????
???

??????????CO_2?????????????????CO_2??CO_2??
???

CO_2?????????????????????????????CO_2???????????????CO_2?????????????????????????????????
????N_2?O_2??

CO_2???????????????????????????N_2?O_2??N_2?
O_2??????????????CO_2???????????????????????????N_2?O_2??????????????????????????????

?????????????????????CO_2??
?????????N_2?O_2???[?1??2?]?

?

?1?????????????????????????Q&A 181?????????????????????2024?
?2???2026?

Posted in ???, ????? | No Comments »

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

?? ? · Wednesday, August 26th, 2026

marc chesneau/iStock

2026?7???

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

?????????2023?9?????????????????2050??????????????pragmatic, proportionate and realistic???2030???2035???

?Net Zero??????????2050???

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

???2024?7???2030??????????????????????????????95???? ??????????????????????????????????2030?????

??2035?GHG?81??1990????NDC???????????? ???

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

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

??????????13???????????????????10????????????????????????????????

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

???????5?26????????????????????????The Labour Party Is Playing With Fire Over Its Future and the Future of this Country?????????????????????????????????????AI?? ??????????????????????????????????

??Does our economy need right now the goal of clean energy or cheap energy??????????????????????????????Net Zero???????????????????

??????Net Zero?? ?????AI???????????????????????????????????????

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

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

7???

?? ?????

????????Clean Power 2030??????????????????????????Clean Power 2030?????????Great British Energy??????????????????????????2030?? ????????????????

???????????????????????2026?10???????????VAT???affordability???Jackdaw???? Rosebank??

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

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

??

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

???2021??G7????????????COP26???????????1.5??????????????????2050??????????????????????
???

2027?????G20????????2028???2????????????????????????????1.5?????????????????????????????
???????????????????????????????????COP?????????????????????????

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

??????????? ?????????SMR???????????????

?? ?? · Tuesday, August 25th, 2026

2026?8??????????????????????????????????SK?HD??????????????????????????SMR????????????
?????

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

Natrium????

???????????Natrium??345??????????????????

?????????????????????????????????500???????????????

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

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

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

??????????????????SMR?i-SMR???

??Natrium??i-SMR???

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

??????????

?????????????????FBR??????????????????????????????????????MOX?????????PUREX??????????????????2040?????????????2030???????????????????????????????????????

??

????????????JAEA??

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

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

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

????????i-SMR???IHI??X??

???

???2040???????????????????2030?????2030???

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

MFBR???i-SMR?Natrium???

??

??

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

COP33?????????????4??1????????

?? ?? · Tuesday, August 25th, 2026

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

2026?8??Bloomberg???????????????2028???????????COP33???????????????????????

???COP31????????COP32???2028???????????4????????? ????????????????????????????

??

??4??1????????????????????????????

?????——????????????????????

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

? **?????**

2028 COP33??????????????????????
2030 CO2??????????????????????????????
2035 ????????????????—??????????????
2049 ???????100????????????????????
2060 ??????????????

COP33???????????????????????CO2????????????????????2049????????????????????????????????? ??????????2060??

????????——???????????

??????????????????????????2025????????????????430??????GW???????????????????????60%?? ???????????1,800GW?????????????????????????????????

??

2026??1???????????????23%???????????????????????????????????33%??????????????18%????? ???????????????????????

??????????

?????????????????????????????——??????**????**????????????????

2026????????????????????360??????????????????????????49%????????????????????1????????? ??????

??????????????????8.6%???9.1%??????????????????????????CREA?Centre for Research on Energy and Clean Air??GEM?Global Energy Monitor?????????????????????????26.1%——??4??1?????

??????????????????????????????????30.2%?????33.9%??????????????????????????10?17%?????? ???

??

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

???????????????????????????????????????CREA?? ??

???2026??????????30GW?????????????????????10?????????????????????????2.7GW??????

????????????????????????????——?? ?

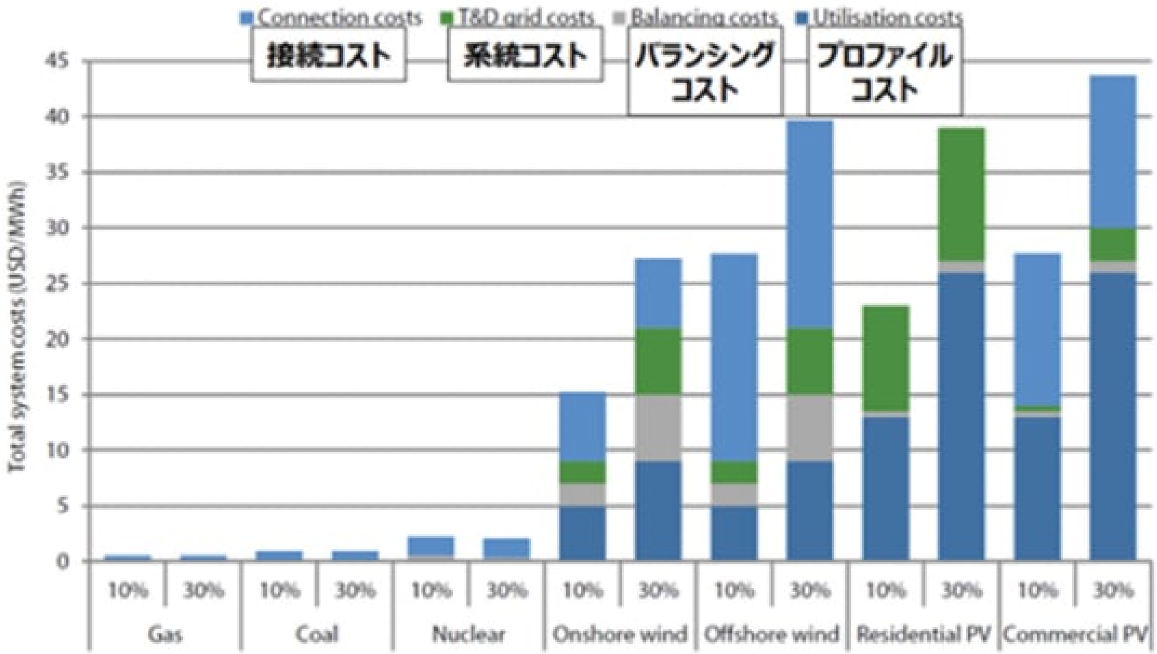
LCOE??????????????????

??????OECD???????NEA???LCOE??????????????????????? ?????????NEA?2018???????LCOE???

???????????FCOE?Full Cost of

Electricity???IEA??

???



???OECD?????2018??????????????????????????????????

????????**????**???——??????????????????——???

????????????——?????????

????????????????????????CMIP5??

????LCOE????????????????????????——???????????????——????????????????????????????LCOE???????????????????????????

???

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

???COP33???4??1??

??——???????????????????????????

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