Global Energy Policy Research | GEPR

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

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?? ?? · Thursday, October 1st, 2026

?????????????????????????????1980????40???????????????Phillips?Valero???????????7????????????

???Ronald Stein??

California is handing control of its fuel supply to foreign refineries

指標	カリフォルニア州	日本
面積	約 42.4 万 km^2	約 36.5 万 km^2
人口	約 3,950 万人（2024 年）	約 1 億 2,340 万人（2025 年）
名目 GDP	約 4.1 兆ドル（2024 年、世界 4～5 位相当）	約 4.0 兆ドル（2024 年、世界 4～5 位相当）
自動車保有台数	約 3,600 万台（2024 年）	約 8,270 万台（2025 年）
一人当たり自動車保有台数	約 0.91 台/人	約 0.67 台/人
稼働中の製油所数	7 カ所（ピーク時 40 カ所超から減少）	約 19 カ所（ピーク時 30 カ所超から減少）

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?GDP????????????????GDP?IMF??Ron Stein??????????????EIA?????????

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??5????PBF??3.4?????? ???2026????????????????????????????????

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Stein????????????????????4??
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???DPA?1950???????????????????????????

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

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

?? ?? · Wednesday, September 30th, 2026

IEA???9?10?????2026??????Coal Mid-Year Update 2026???????[?21?]?????2025?????????????????????????????????????2026??????????????????????????? ????????????2026??2027??????????????????

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?????????2025???????????91??????????????????????0.3???88.4??????????????????????????????2026??????????1.2?????89.1??????????????????????????????????**???????????????**???????????

????????????????????2025??2???????????????????????????????????

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????**?????????2025??49.6?????????????????????88.4??????56????????????**???????**2025??? ???????????????????91?????????????47.1????????????????????95??????**???????????

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??IEA???????????????????2026???1?????**50???????**???????????

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??2025?????????1????????????1?????????????????50?????????????????????**??78??????????????? ????????**????????[?24?]?

?????????CO2????????????????????????26???????????1???1.6??????**???????????3?**??????????????? ????????????EU??????????2.8????????????6????????

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

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

?????????????????????IEA?????2026???????????13.6??????????4.2???0.57????????????????????? ???13%?1??????????????????????????????????2026????????11???????????????8?????????????????? ?

????2?????????????????????7?????????[?25?]?????????**?????????4.4???????????????????????????????**

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???5???????[?6?]?

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??6?10?/kWh[?9?]???????????4?/kWh[?10?]???????????
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???EV??????????????????????
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?1?Coal Mid-Year Update 2026
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?3????2026??????????????????????????50?????
?4????????????????????????????
?5??????????????????30???????????90????3???????????7???????????????
?6?????????????????????????350g/kWh?????????????????5?6?kWh????
?7??????????????????????????????????30???Feb 2023
?8????????WG??????2026?2?6??
?9?www.mrjjxw.com 2022.9.22
?10?www.tpsq.gov.cn
?11?????????????????????????????????????CO2??????????????????????????????25??25?????????????????????????CO2???

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

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?? ?? · Tuesday, September 29th, 2026

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

2020?11?????????2?????????2024?11????????????NUMO?????????????????????????????????????
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????2000???????????????????????????2020??[?2?]????????
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2. ????????????

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????5G???[?6?]?

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

2026?3?????????????????????????????5?20?????????[8][9]???
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4. ????????????????????

8?31???????????????????????????????????????2??
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5. ????????????????????

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

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?4?????????????????????2026?8?7??

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?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

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

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

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

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

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

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

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

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

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?????3?????????????E-ledgers?E-liability???
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Posted in ???, ????, ????? | No Comments »

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

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

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5??EMDE??????????????????????????????

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1.5????2050?????????????????????????????????????COP?????????????????????????????????????
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Posted in ???????????, ???, ????? | No Comments »

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

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

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

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

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

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E -
ledgers???

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

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

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

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??emergy, embodied energy???

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Posted in ???, ????? | No Comments »

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

?? ?? · Monday, September 21st, 2026

E-ledgers Institute HP??

??????2026?4?????????????????3?????????????????????????????????????**????3?????????????**??????
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- ????3???????????CO2????Microsoft???????? | ??? ??????????
- ????????AI?????3???????? | ??? ??????????
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- ?????????????????100%?????????????????
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??????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??

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

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

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

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

??? ?? · Sunday, September 20th, 2026

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

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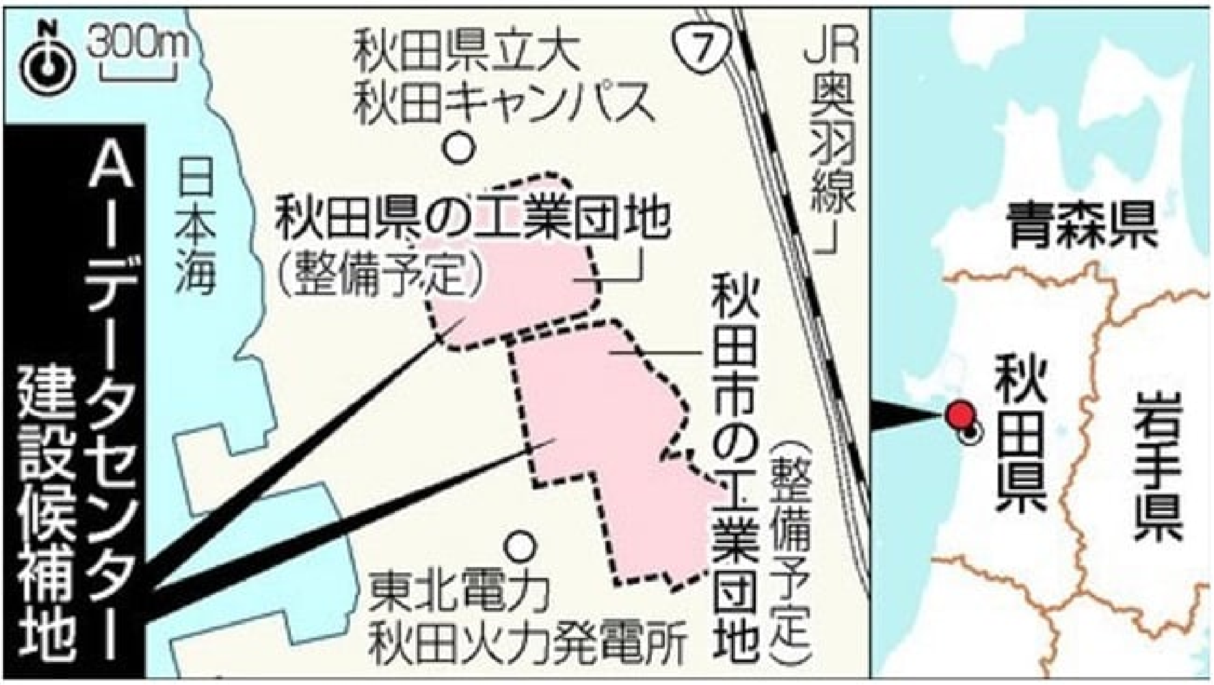

?1?DC??????????????????????????
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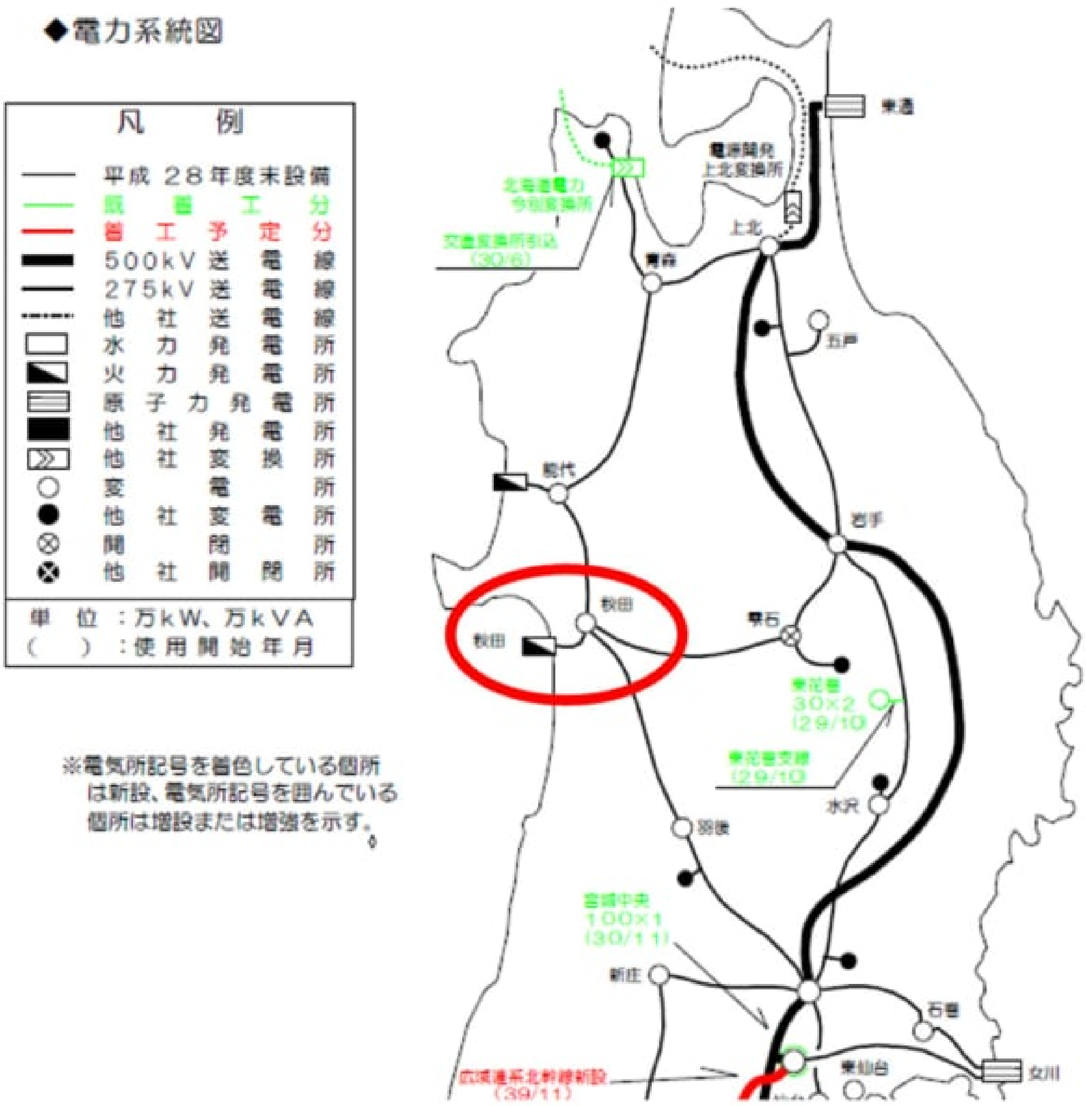

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UAE????????????AI?????

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

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

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

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

Posted in ???, ?? | No Comments »

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

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

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

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?? ?? · Monday, September 14th, 2026

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

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

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?? ?? · Friday, September 11th, 2026

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

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

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

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

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

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

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

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

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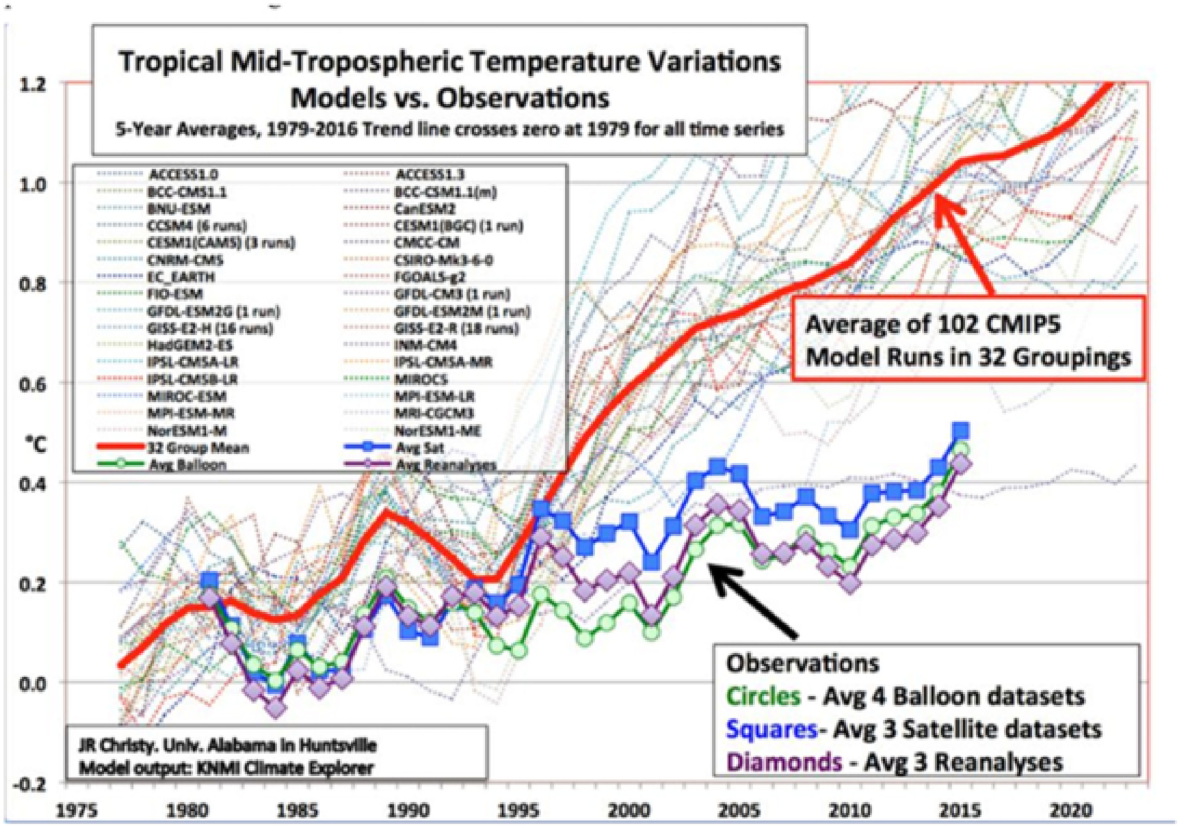

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Posted in ???, ????? | No Comments »

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

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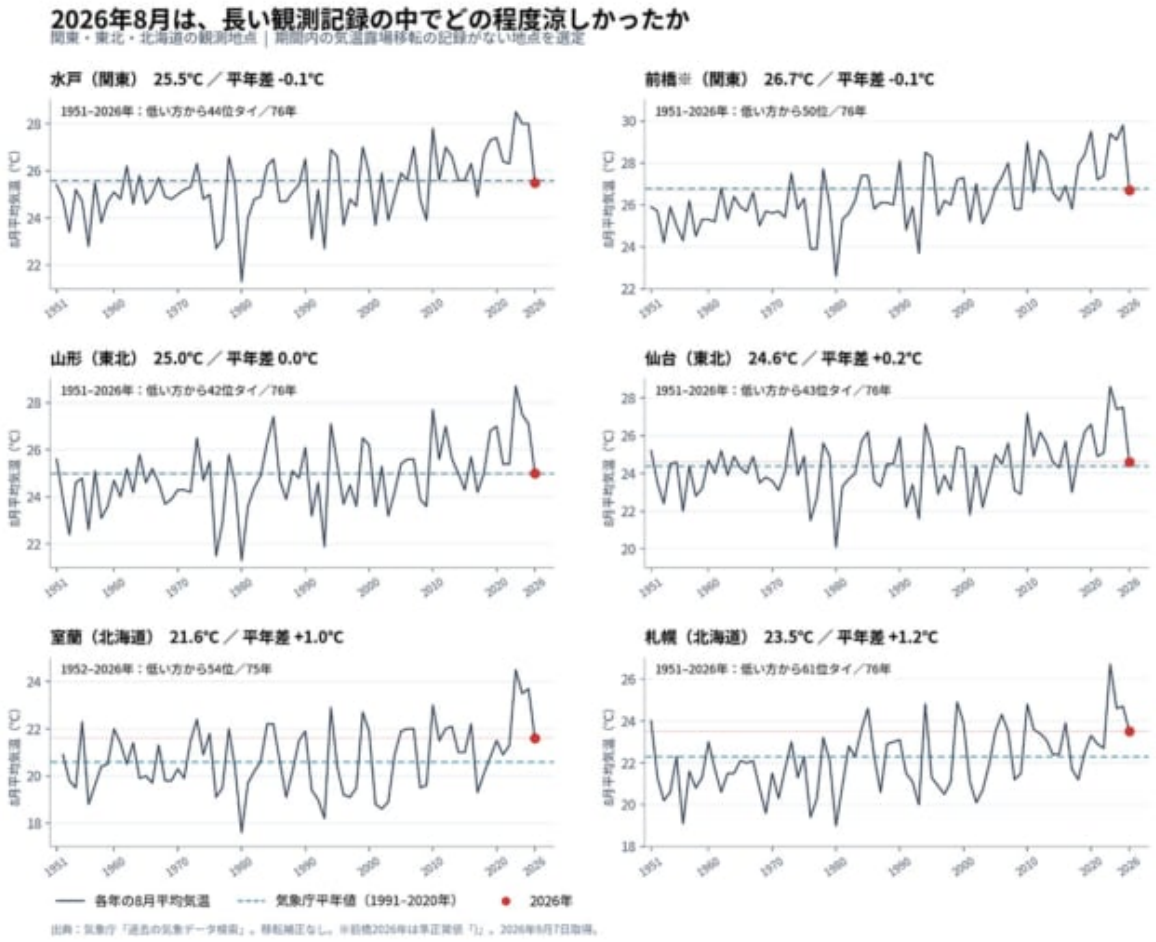

?1?6???8??????????
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??	**2026?8? ????**	**?????**	**??10? ?????**	**???? ??????**

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??	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?

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?????1991?2020????10??2016?2025???????2026????76??????75????????????1?????????????????
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Posted in ???, ????? | No Comments »

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?? ?? · Monday, September 7th, 2026

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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????RCP8.5???

???17?Nature?????????????????NGFS????????
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FJ?????????????????

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

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1. **???????????**
   TCFD?ISSB?NZFSPA???
2. **TCFD????????**
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3. **ISSB????????**
   ISSB???
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   2020?????????????????????????ISSB?????????????????????????????
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8. **SEC????????????????**
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9. **????1?2?3?????????**
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10. **??????????????????**
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11. **???????????????????**
    TCFD?ISSB?NZFSPA???
12. **?????????????????**
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13. **GFANZ?????????????????**
    130???????????GFANZ???
14. **GFANZ?????????**
    GFANZ???
15. **?????????????????????**
    TCFD?NZFSPA?ISSB???
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    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???
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24. **????????????**
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28. **ESG?????????**
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29. **EY?????????????????????????????????????**
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30. **KPMG?????????????????**
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31. **PwC?????????????????**
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33. **?????????????????????????**
    TCFD?ISSB?NZFSPA???
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36. **??????????????**
    2020???
37. **????????????????????????????????**
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38. **????????????????????**
    ?????????????????????????TCFD?ISSB?NZFSPA???

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

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

?? ?? · Sunday, September 6th, 2026

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

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

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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

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?? ?? · Saturday, September 5th, 2026

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

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

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

??????Option

1c????????**????3????????????????????**?????????????????????????????????**????1?2?????????????**
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Posted in ???, ????, ????? | No Comments »

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??? ?? · Friday, September 4th, 2026

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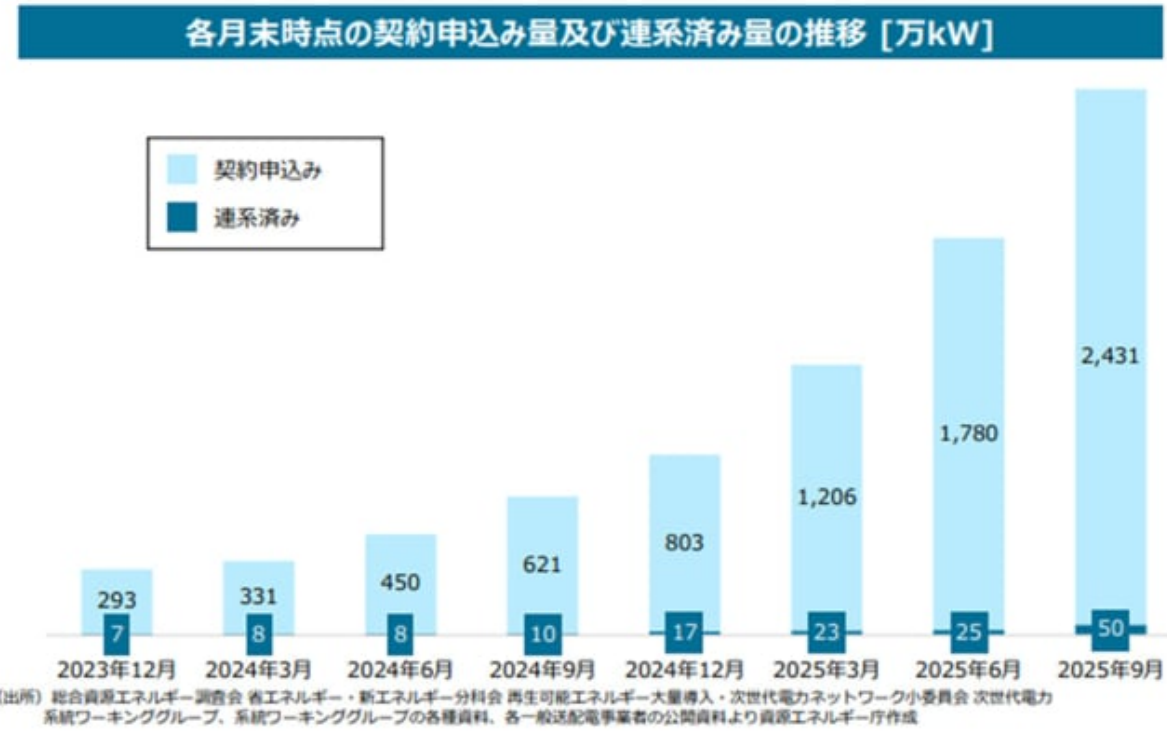
??????????????????1??????????????????????????????2025?9????????50?kW????????2,431?kW??????



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

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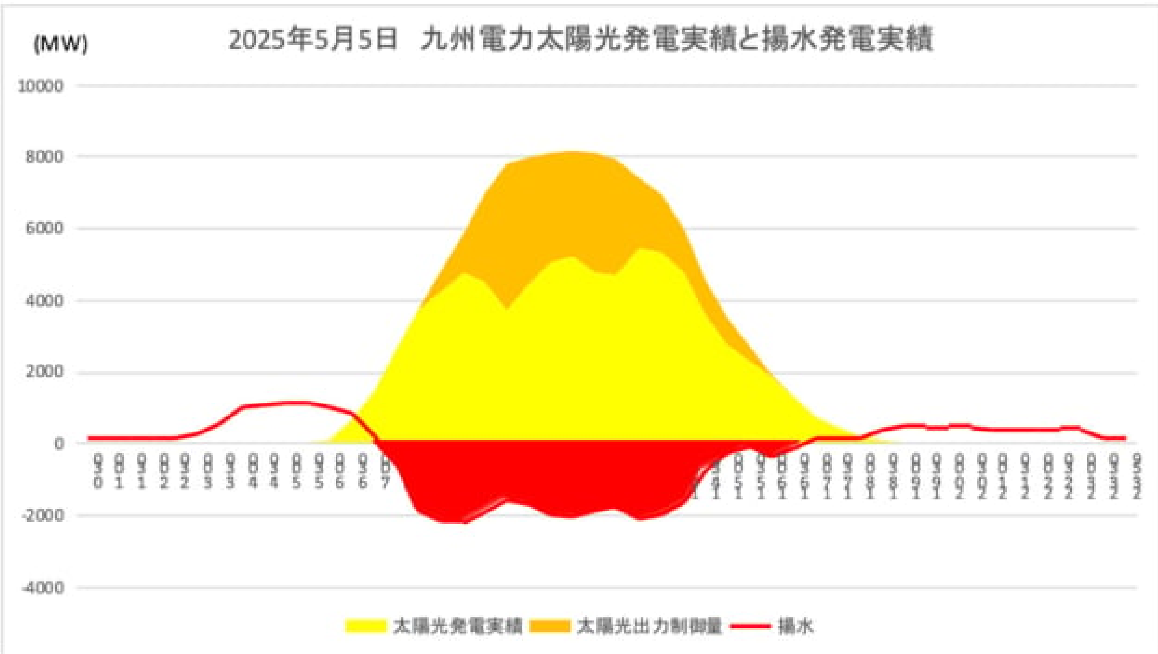

?2?2025?5?5??????????????????????

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

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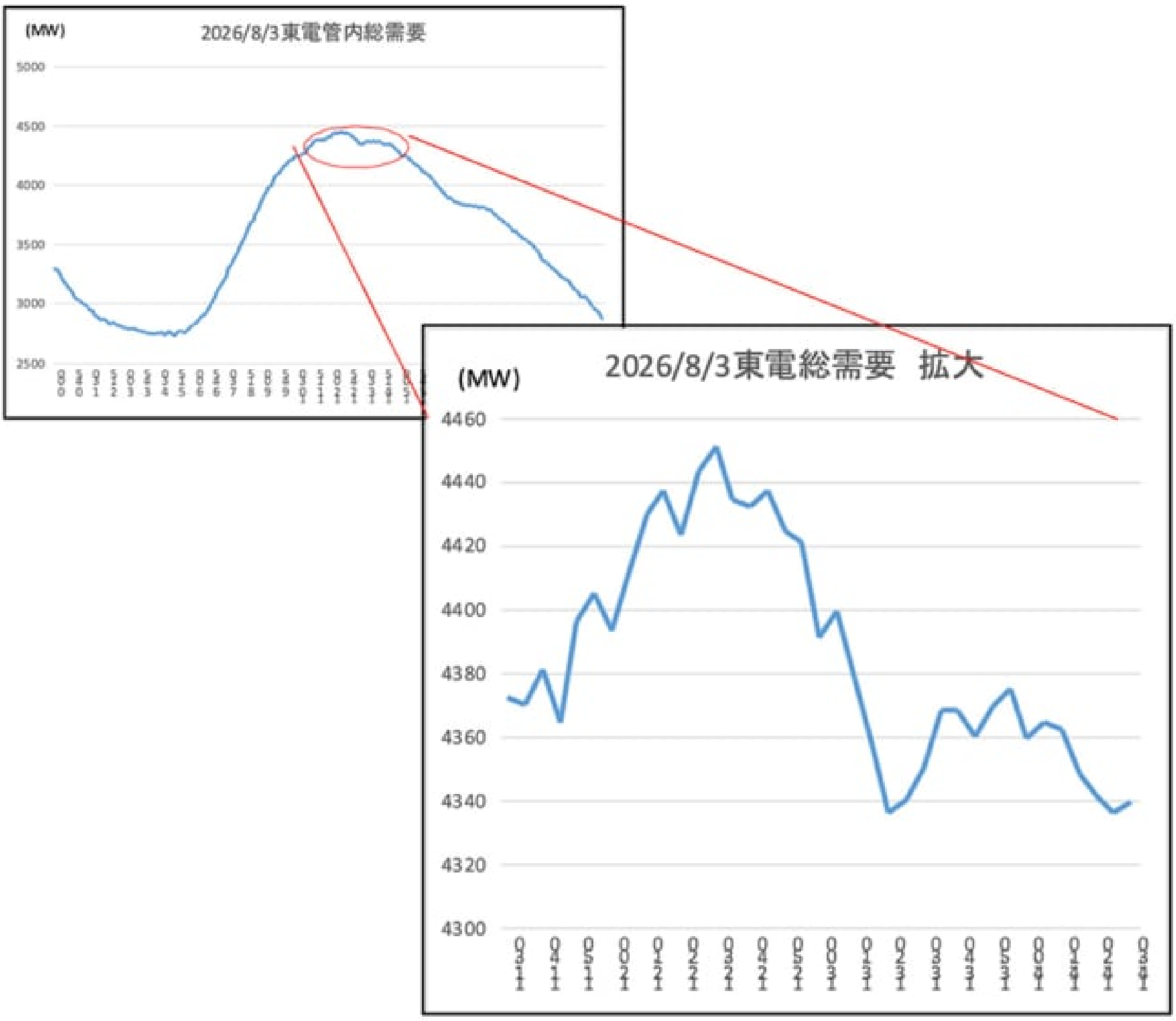
??1??????????????????3?2026?8?3????????????????????5?????????11:30?14:30????????????



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

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19,100?kW × 41.6??/kW = ?79.5???????

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

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

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79.5?? × 8.0% ? ?6.4????

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7.7?? ÷ 7,707?kWh ? 10.0?/kWh

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	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	―	3.6万円/kWh	11.2万円/kW	9.1万円/kW
運転維持コスト	―	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

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	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

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

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Posted in IT?AI, ??? | No Comments »

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?? ?? · Thursday, September 3rd, 2026

y-studio/iStock

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????23.8??

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

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

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?? ?? · Thursday, September 3rd, 2026

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Coalition??NOAA?????1?????????????????????????????????UHI?????????????????????????????
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RCP8.5?SSP5-8.5???
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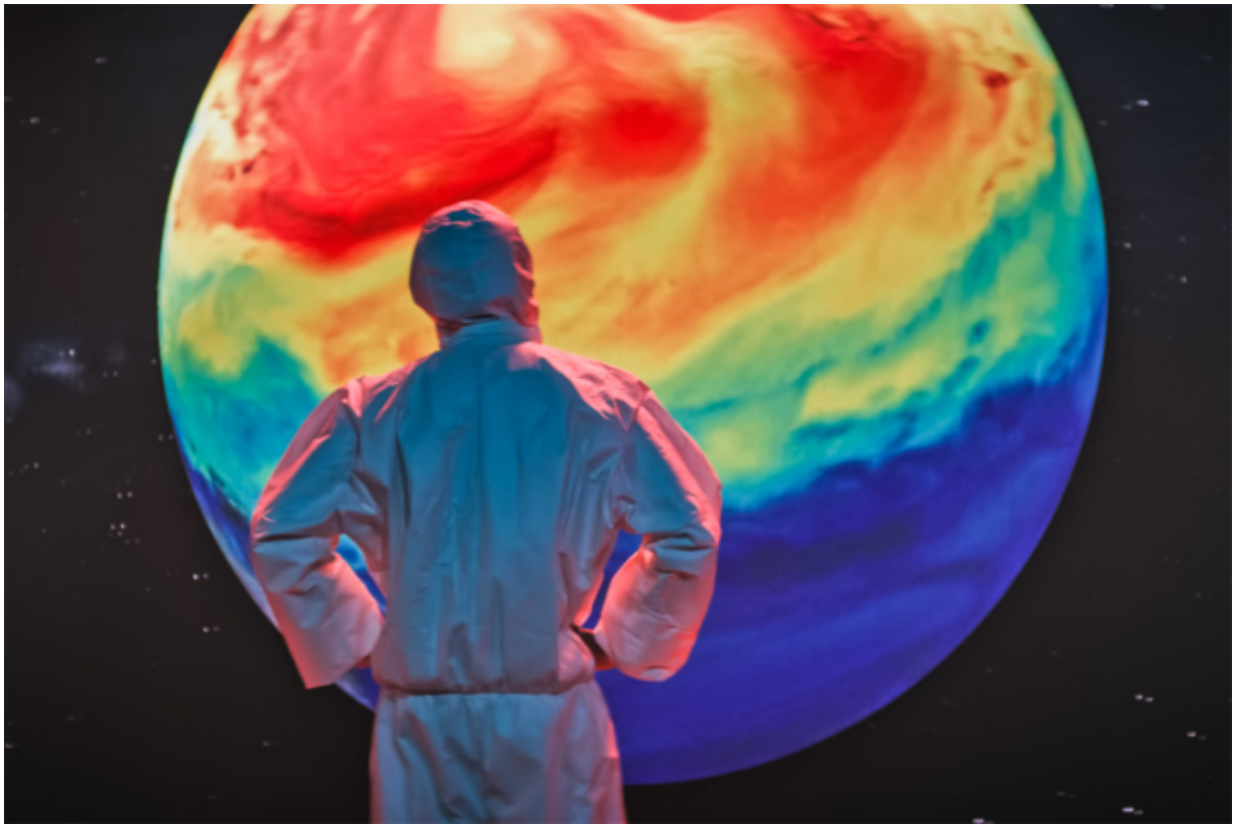
?? ?? · Wednesday, September 2nd, 2026



janiecbros/iStock

?????????????????????????9000m????????????IPCC??????CMIP6???????????UAH?????????????
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???CIGS
WP???????CMIP6???

????????????13?????????????????????1979?2024??????39?CMIP6????UAH?v6.1??????????????
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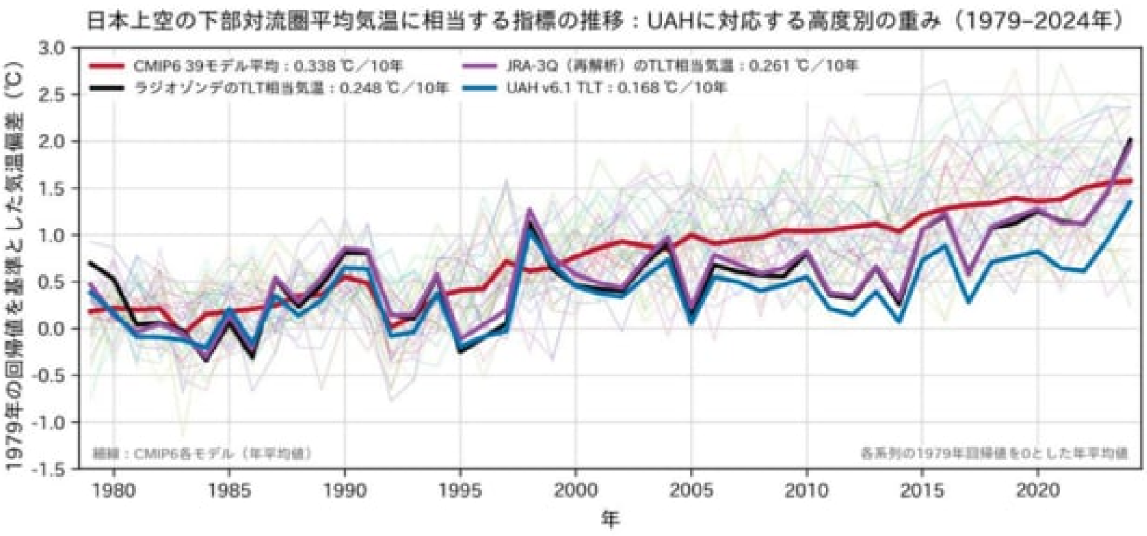
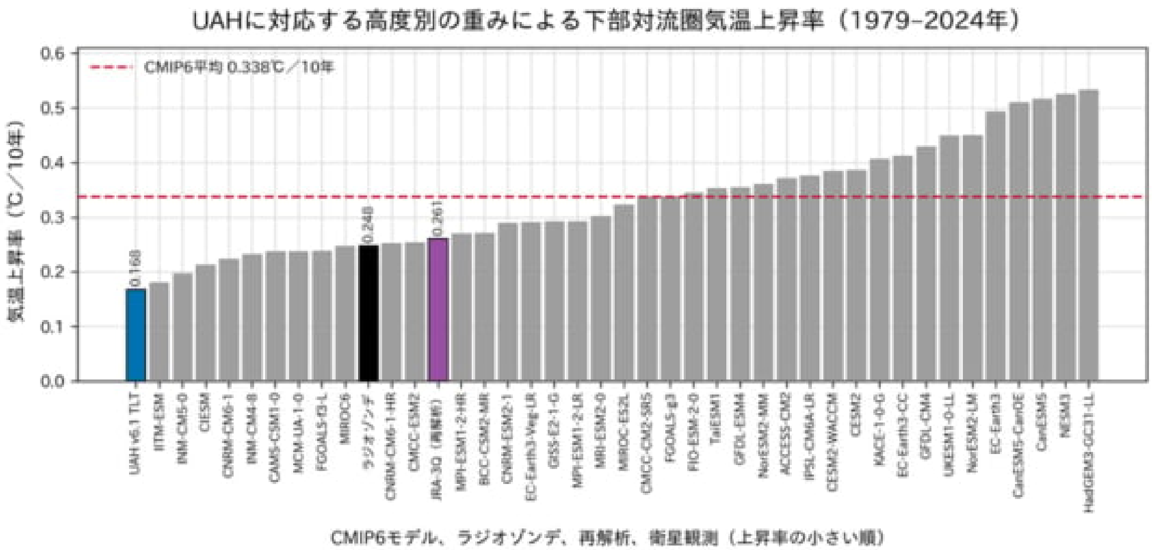
????1?????????????1979?????????????????????????39?????????????UAH?????????????????????
??46?????????????????????????????????



?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??

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

?? ?? · Tuesday, September 1st, 2026

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2028??

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???244??10???2?9,294???????????????????????????????????

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2028?????2034??

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

?? ?? · Monday, August 31st, 2026

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

????AI??

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

Big Tech Loved Green Energy–Until It Needed Reliable Power

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

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

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

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

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

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

?? ?? · Saturday, August 29th, 2026

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???GX??

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

???GX???

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

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

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

?? ?? · Friday, August 28th, 2026

2025?8?????EU???EU????????????
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?????????EC???????????????????????????????????CSDDD?????????????????CSRD???????????
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?ESG Today?????????????????????????U.S. Mission to the EU??EC???

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

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

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

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

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EU?? ??…??

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

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

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???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?]?

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

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?? ? · Wednesday, August 26th, 2026

marc chesneau/iStock

2026?7???

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

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

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???2024?7???2030?????????????????????????????95????
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??2035?GHG?81??1990????NDC????????????
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??????????13???????????????????10???????????????????????????????

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???????5?26?????????????????????????The Labour Party Is Playing With Fire Over Its Future and the Future of this Country?????????????????????????????????????AI??
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??Does our economy need right now the goal of clean energy or cheap energy??????????????????????????????Net Zero???????????????????

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

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7???

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????????Clean Power 2030?????????????????????????Clean Power 2030?????????Great British Energy?????????????????????????2030???
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???2021??G7????????????COP26???????????1.5???????????????????2050?????????????????????????
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2027?????G20????????2028???2?????????????????????????????1.5?????????????????????????????????
????????????????????????????????????COP?????????????????????????

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