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

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

?? ?? · Sunday, October 18th, 2026



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

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

?ESG??

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GHG????????????WRI????????10????????????CO2????????????
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 liability????????????GHG????????E-liability?GHG????????

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SDGs?ESG?TCFD????????????CDP?SBTi?CA100+????????100+????????
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CO2?1??
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???E-ledgers/E-
 liability??
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????3????????E-ledgers?E-liability??

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

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

?? ??? · Saturday, October 17th, 2026



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

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元素記号	主な用途
サマリウム：Sm	サマリウムコバルト磁石
ガドリニウム：Gd	磁気メモリ、レーザー光源、MRI 造影剤
ジスプロシウム：Dy	ネオジム磁石、レーザー光源
テルビウム：Tb	ネオジム磁石、蛍光体材料、海軍ソナーシステム
ルテチウム：Lu	触媒、放射線医薬品、蛍光体材料
スカンジウム：Sc	高強度アルミニウム合金、水銀灯、ハロゲンランプ
イットリウム：Y	蛍光体材料、YAG レーザー、薄膜コンデンサ

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???JOGMEC????????????????????????????????????

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

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2. ?????????????USGS?

2025????????????1????????????27????????39????69%????

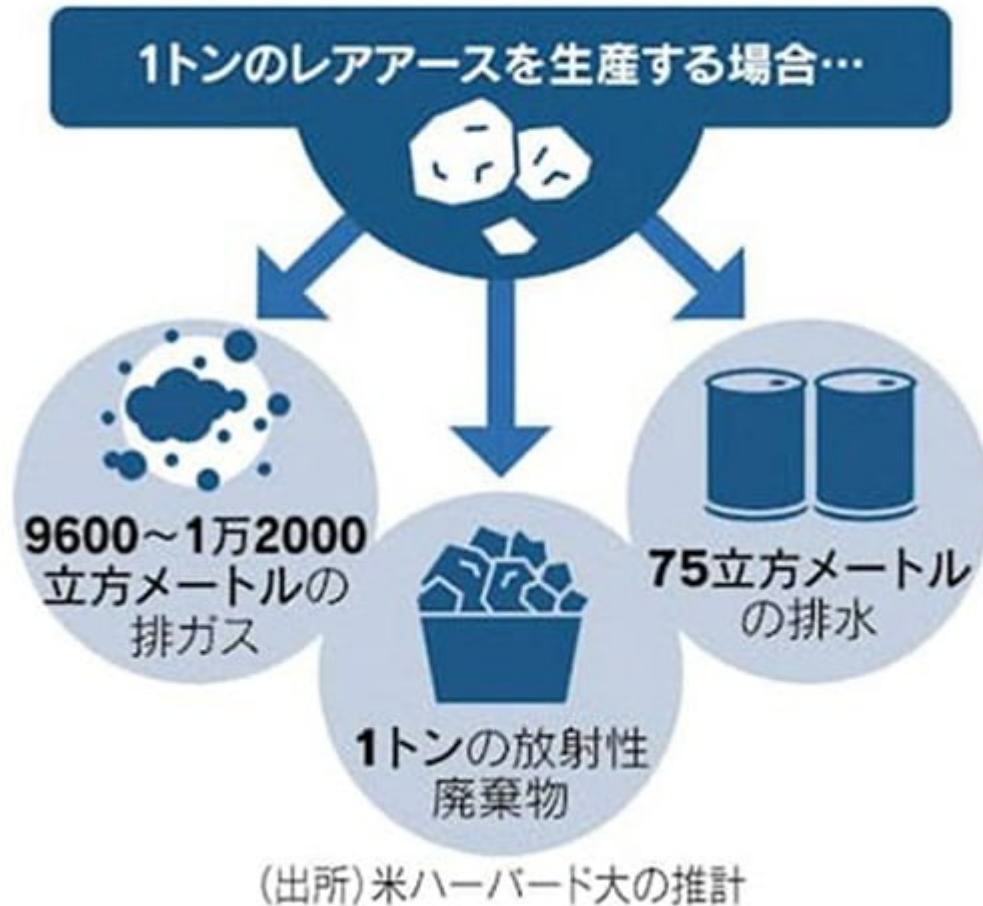
2????5?1,000??3????2?9,000????2?2,000????????????

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3. ?????????

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レアアース生産は大量の副産物を排出



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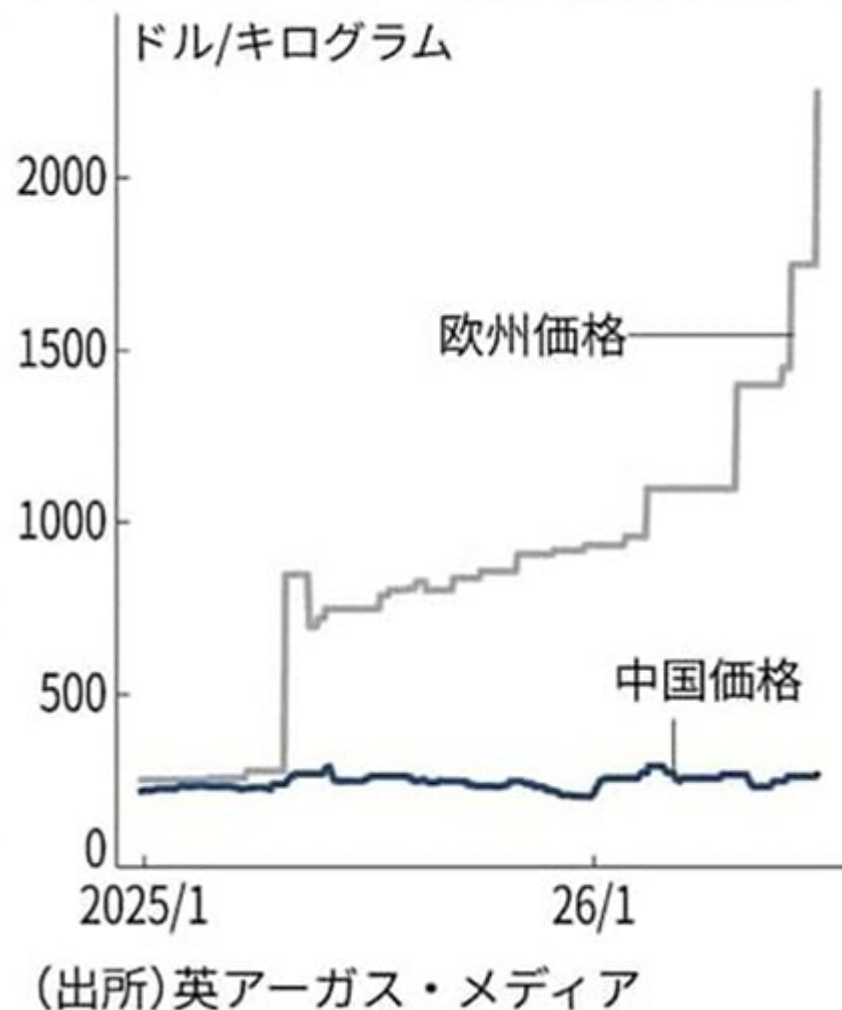
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ジスプロシウムの価格差が拡大



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?1????????????????2025.11.22

?2???????????? ? ?????????2026.8.14

?3????????????????No.980?2026-V?

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

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?? ?? · Wednesday, October 14th, 2026



製油所はなぜ 戦略目標になるのか

— 製油所戦争と現代社会の脆弱性 —

????America Out Loud
NEWS?2026?10?5??
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The refinery war and the vulnerability of modern society

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

????????????????????OK??????????????

?? ?? · Sunday, October 11th, 2026



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

E-ledgers/E-

liability??

??E-ledgers

Institute?FAQ??

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E-

ledgers????3??1????????????????????????????????????

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??SOx????????NOx????????????

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炭素クレジットがOKなら、他の環境負荷クレジットも可能？

42/50

たとえば、**産廃クレジット制度**

C社（産廃クレジット創出者）

一年間の排出目標：**50トン**
排出実績：**40トン**
差分である**10トン**分の産廃クレジットを発行



D社（産廃クレジット購入者）

一年間の排出実績：**10トン**
C社から産廃クレジットを購入することで**オフセット**
産廃ゼロと顧客にアピールする

たとえば、**水銀クレジット制度**

E社（水銀クレジット創出者）

一年間**水銀の排出基準を順守**
環境基準値と実績値の差分を
水銀クレジットとして発行



F社（水銀クレジット購入者）

実際には**水銀の排出基準を超過**して
河川に放流したが（**= 法令違反**）、
E社から水銀クレジットを購入することで**オフセット**

ESG?????????? | ?? | ???????????????

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?10????????????????????????????????10??
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ledgers????????????????????1??3??
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?????3?????????????E-ledgers?E-liability??
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Posted in ???, ???, ???? | No Comments »

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

?? ?? · Tuesday, October 6th, 2026



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2026?8????GX????????????????????????????????????GX????????????????????????????????
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EU?2035????CO2?????100%?90%??
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??GX??

8?26????????????????????????????????????GX????????????????????GX????????????????
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GX??R????????R?Resilience????????GX????????????????????????????????GX??

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30?/Nm³??

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h????100?/Nm³????14????????2.8?/kWh????????

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

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?? ?? · Sunday, October 4th, 2026



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9?24????????????????????????????????????25??
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???Q&A??
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???2022?6?12??
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???2026?4?Q&A??
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?1??2026?9?29?JAPAN Forward???
?2?????GHD????????????????????????????????9/29????2026?9?24????9?29???

??2026?9?29??
??2024?4?1???2022?7??????5?????
??2026?4?1??47??Q22-1?????PDF?
??2026?9?24??
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?8?Q????-KP???-??2020?3?6????HQJT17086A3?2????KPV-A55-J4(-HQ)?KPV-A55-SJ4??KPV-A55-J4?KPV-A55-SJ4?????
??2015?9?11?2?4?????
??2026?9?25??
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??2022?6?12??
??2022?11?9?????2022?10?26??
??2026?4?1??44??Q20?????PDF?
??2025?4?????2025?3??
??2026?4?1?6??Q2?????

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

E-ledgers????????

?? ?? · Saturday, October 3rd, 2026



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

E-ledgers/E-
liability??
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CO2?1??

E-
ledgers??
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GFANZ?Glasgow Financial Alliance for Net Zero??NZBA?Net-Zero Banking
Alliance??2025????CDP?SBTi????????????????????????????
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ledgers????????????????????????????

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

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

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?? ?? · Thursday, October 1st, 2026



????????????????????1980????40????????????????Phillips?Valero????????????7?????????????
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???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?????
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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????????¹²????2025????????????????????????????????????2026????????????????????
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????????2025????????91????????????0.3???88.4????????????2
026????????1.2????89.1????????????????????
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??IEA????????????2026??1????50????????????

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??2025????????1????????1????????50????????????78????????

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????????????IEA????2026????13.6????4.2??0.57????????

???13%?1????????2026????11????8????

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????2????????7^{35?}????4.4????

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????50?55????15?20????10????5?10????

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??5?????^{26?}

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??6?10?/kWh^{29?}????????4?/kWh^{10?}????????
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?1?Coal Mid-Year Update 2026
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?4????????????????????????????????
?5????????????????30????????90????3????????????7????????????????
?6????????????????????350g/kWh????????????5?6?kWh????
?7????????????????????????????30???Feb 2023
?8???????WG?????2026?2?6??
?9?www.mrjxw.com 2022.9.22
?10?www.tpsq.gov.cn
?11????????????????????????????CO2????????????????????25????????????????
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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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2. ?????????????

????2024?6??^{34?}????????
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?????2026?7????????????????????????1994????????????????????????????^{25?}????
????5G??^{26?}

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

2026?3????????????????????????5?20????????^{28?29?}????????????????????
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4. ?????????????

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

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??2023????????????2026?3????317????????????
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- ?1????????2????????????????????????????2024?11?22?
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- ?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



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???E-ledgers/E-
liability????????????????????100%????????1????????
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E-ledgers????????????????????CBAM????????EU-
ETS????????EU????????????????????
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ledgers????????????????????...

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2026????????CBAM????????EU????????????????????CBAM????
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EU????????2025?11????
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ledgers????????
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ledgers????????

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



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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??
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- AI??
??EMDE????????????????????
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- ?????????????????????EMDE??
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?EMDE????????????????????????????3?????Pathways?????????

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

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

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

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

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



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

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

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

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[illegible][illegible]

14.14. $\mathcal{A} = \mathcal{A}_1 \cup \mathcal{A}_2$, $\mathcal{A}_1 = \{A_1, A_2, A_3, A_4, A_5, A_6, A_7, A_8, A_9, A_{10}, A_{11}, A_{12}, A_{13}, A_{14}, A_{15}, A_{16}, A_{17}, A_{18}, A_{19}, A_{20}, A_{21}, A_{22}, A_{23}, A_{24}, A_{25}, A_{26}, A_{27}, A_{28}, A_{29}, A_{30}, A_{31}, A_{32}, A_{33}, A_{34}, A_{35}, A_{36}, A_{37}, A_{38}, A_{39}, A_{40}, A_{41}, A_{42}, A_{43}, A_{44}, A_{45}, A_{46}, A_{47}, A_{48}, A_{49}, A_{50}, A_{51}, A_{52}, A_{53}, A_{54}, A_{55}, A_{56}, A_{57}, A_{58}, A_{59}, A_{60}, A_{61}, A_{62}, A_{63}, A_{64}, A_{65}, A_{66}, A_{67}, A_{68}, A_{69}, A_{70}, A_{71}, A_{72}, A_{73}, A_{74}, A_{75}, A_{76}, A_{77}, A_{78}, A_{79}, A_{80}, A_{81}, A_{82}, A_{83}, A_{84}, A_{85}, A_{86}, A_{87}, A_{88}, A_{89}, A_{90}, A_{91}, A_{92}, A_{93}, A_{94}, A_{95}, A_{96}, A_{97}, A_{98}, A_{99}, A_{100}\}$, $\mathcal{A}_2 = \{A_{101}, A_{102}, A_{103}, A_{104}, A_{105}, A_{106}, A_{107}, A_{108}, A_{109}, A_{110}, A_{111}, A_{112}, A_{113}, A_{114}, A_{115}, A_{116}, A_{117}, A_{118}, A_{119}, A_{120}, A_{121}, A_{122}, A_{123}, A_{124}, A_{125}, A_{126}, A_{127}, A_{128}, A_{129}, A_{130}, A_{131}, A_{132}, A_{133}, A_{134}, A_{135}, A_{136}, A_{137}, A_{138}, A_{139}, A_{140}, A_{141}, A_{142}, A_{143}, A_{144}, A_{145}, A_{146}, A_{147}, A_{148}, A_{149}, A_{150}, A_{151}, A_{152}, A_{153}, A_{154}, A_{155}, A_{156}, A_{157}, A_{158}, A_{159}, A_{160}, A_{161}, A_{162}, A_{163}, A_{164}, A_{165}, A_{166}, A_{167}, A_{168}, A_{169}, A_{170}, A_{171}, A_{172}, A_{173}, A_{174}, A_{175}, A_{176}, A_{177}, A_{178}, A_{179}, A_{180}, A_{181}, A_{182}, A_{183}, A_{184}, A_{185}, A_{186}, A_{187}, A_{188}, A_{189}, A_{190}, A_{191}, A_{192}, A_{193}, A_{194}, A_{195}, A_{196}, A_{197}, A_{198}, A_{199}, A_{200}\}$.



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

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

?? ?? · Monday, September 21st, 2026

E-ledgers Institute

E-ledgers Institute HP??

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- ?????????????CO2????Microsoft???????? | ??? ??????????
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ledgers????E-liability????????Robert Kaplan????E-ledgers
Institute????

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Institute??GHG????????????3??
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ledger????????????????????????????????CO2??
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Kaplan????????????????accurate????timely????comparable????auditable????
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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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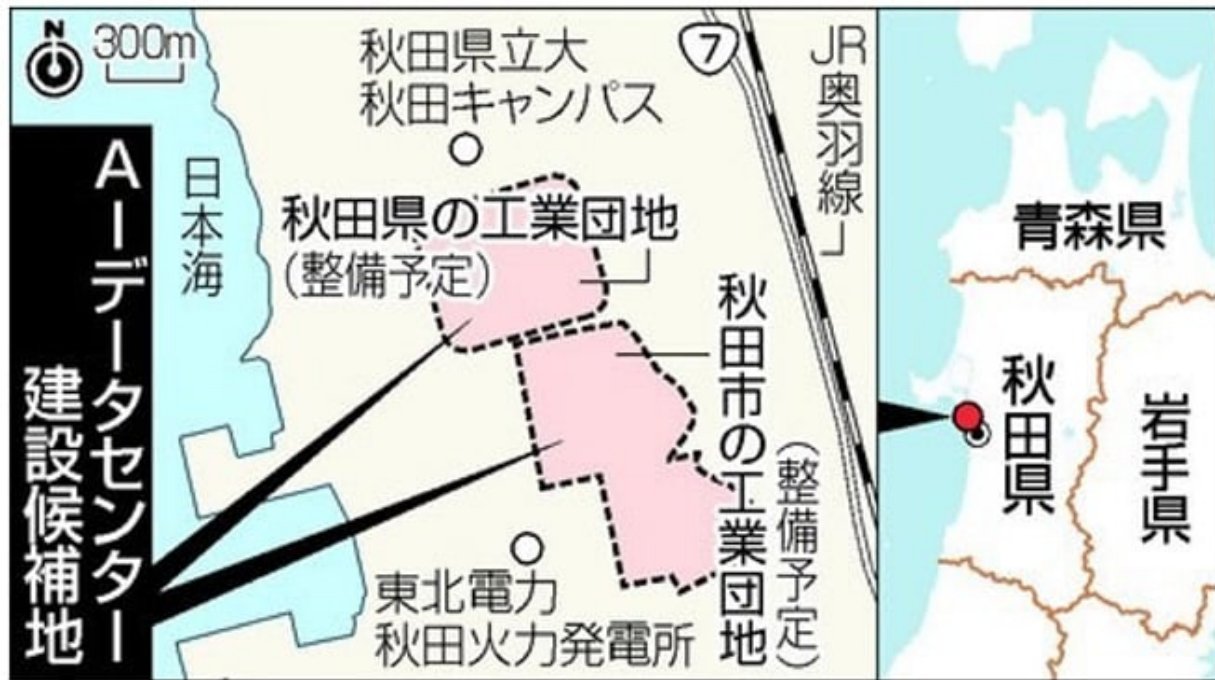
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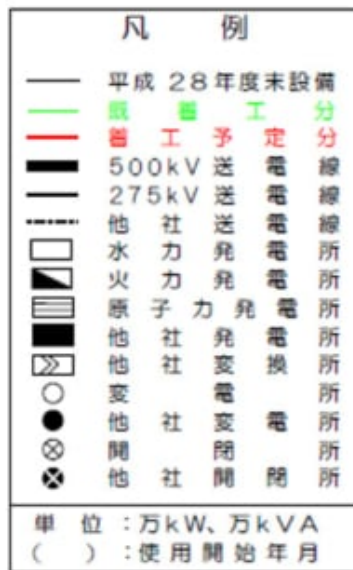


1?DC????????????????????
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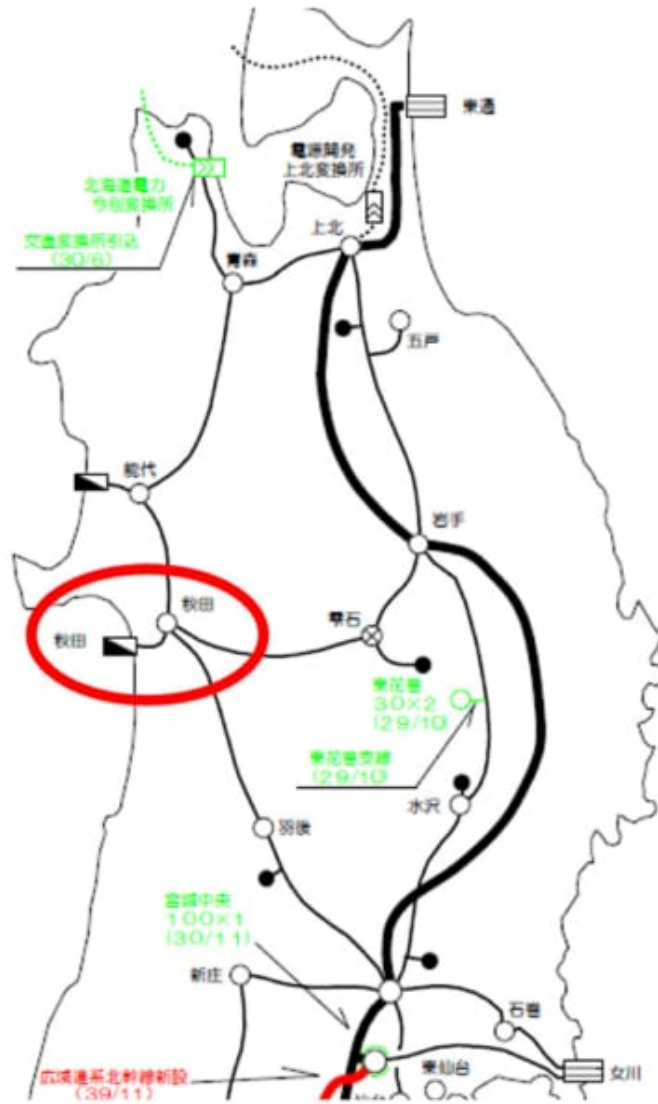
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◆電力系統図



※電気所記号を着色している箇所
は新設、電気所記号を囲んでいる
箇所は増設または増強を示す。



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

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

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

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

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

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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????????????????????????????BlackRo
ck?State
Street?Vanguard????????CDP?SBTi????????????????????Fitch?Moody’s?S&P?
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Posted in ???, ???, ??? | [No Comments »](#)

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?? ?? · Friday, September 11th, 2026



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Reporting??

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complicated and unfocused.?

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strategic interrogation of issues that generate company value???????

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

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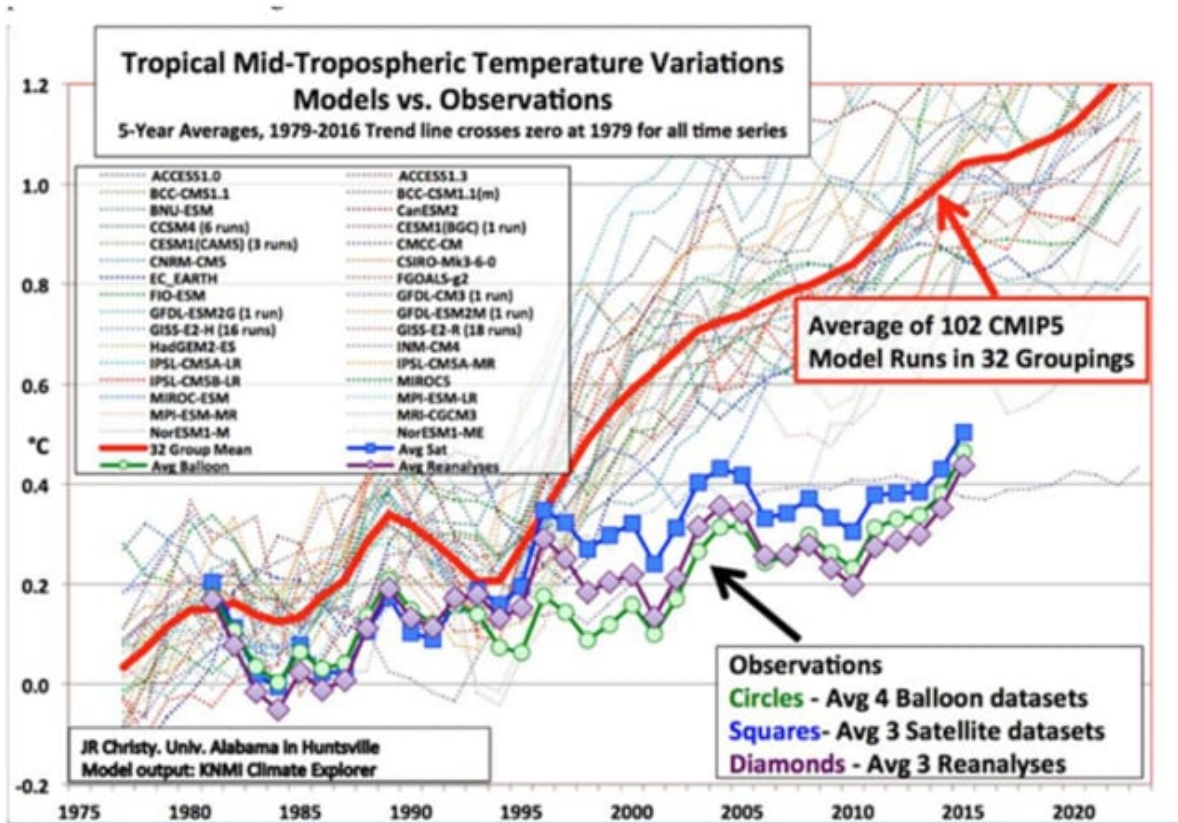
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Validation????????????????

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



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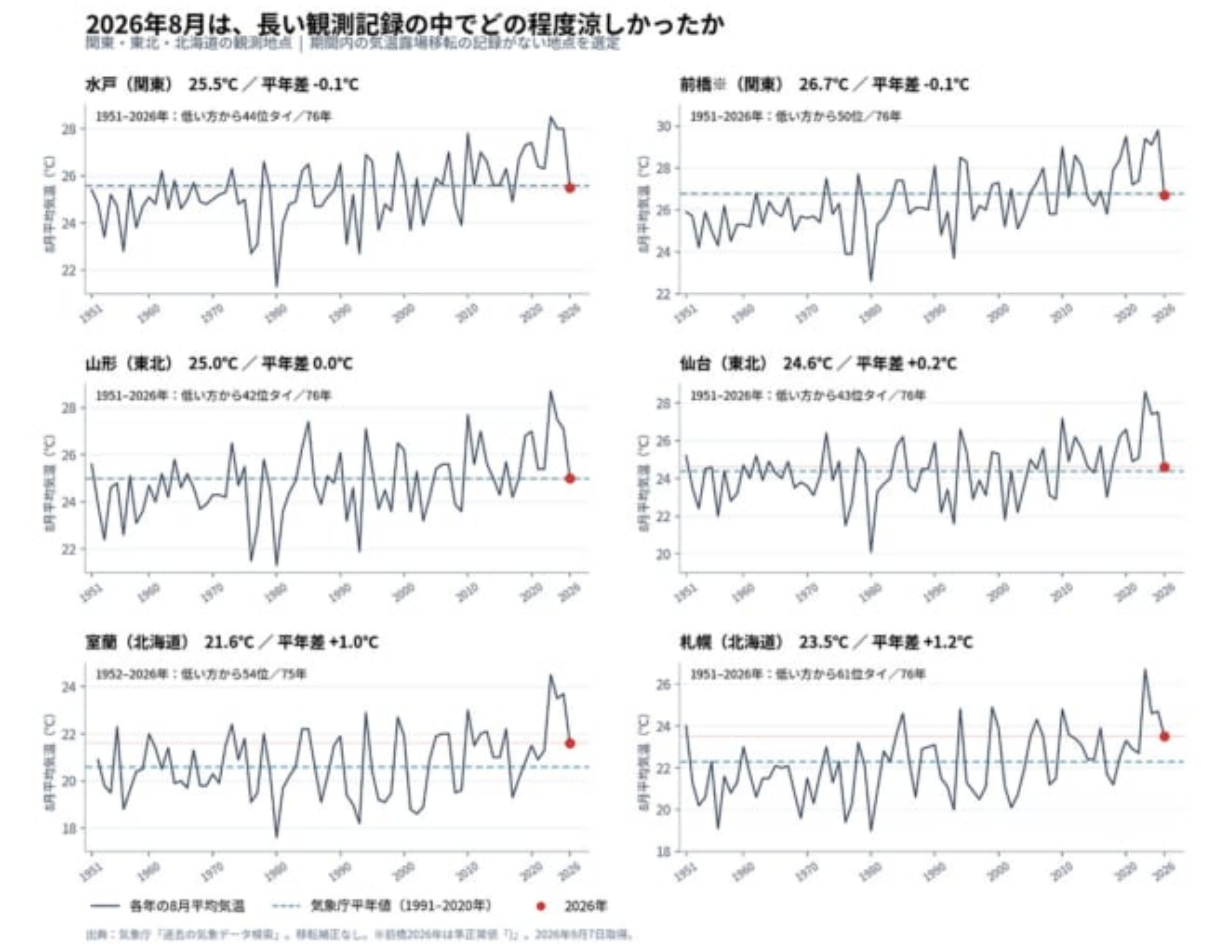
????????8????10????1.3?1.5????2?3????4????2017????8????

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??	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?

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Posted in ???, ????? | No Comments »

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

?? ?? · Monday, September 7th, 2026

202678?24??????????????????4??????????38??ES
G??

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PwC???ISSB??RCP
8.5??

NGFS

RCP8.5

Nature

17

2024 Nature The economic commitment of climate change

23 28

TCFD ISSB NZFSPA

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5 ESG

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RCP8.5 GFANZ 5 ESG 4

??4?38??

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???RCP8.5??

??17?Nature????????????????NGFS????????
???16??NGFS????????????2025?12????GPIF???U
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16????????????4????38??

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1. ?????????
TCFD?ISSB?NZFSPA??
2. TCFD????????
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ISSB??
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2020????????????????????ISSB????????????????????
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TCFD?ISSB?NZFSPA????????
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13. GFANZ????
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14. GFANZ????
GFANZ????
15. ?????????
TCFD?NZFSPA?ISSB????
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17. **?????Nature?????????????**
2024??Nature???The economic commitment of climate change??
18. **RCP8.5?????????????**
RCP8.5?????????????IPCC??
19. **NZFSPA?????????????????????**
NZFSPA??
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UN PRI??
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2020?????????ESG??
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TCFD?ISSB?NZFSPA??
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24. **?????????????????????**
TCFD?NZFSPA?ISSB??
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29. **EY?????????????????????????????????????**
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30. **KPMG?????????????????????**
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31. **PwC?????????????????????**
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38. **?????????????????????**
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?? ?? · Sunday, September 6th, 2026



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

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?? ?? · Saturday, September 5th, 2026



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

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

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??? ?? · Friday, September 4th, 2026

蓄電池市場の活況

「第2の再エネ賦課金」の始まりか

新たな
上乗せ
コスト?

電気ご使用量のお知らせ

再エネ賦課金	3,450円
(新たな負担の可能性) 蓄電池賦課金 (※特) ???円	

ご請求金額 (イメージ) **UP**

気づかぬうちに
負担が上乗せに?

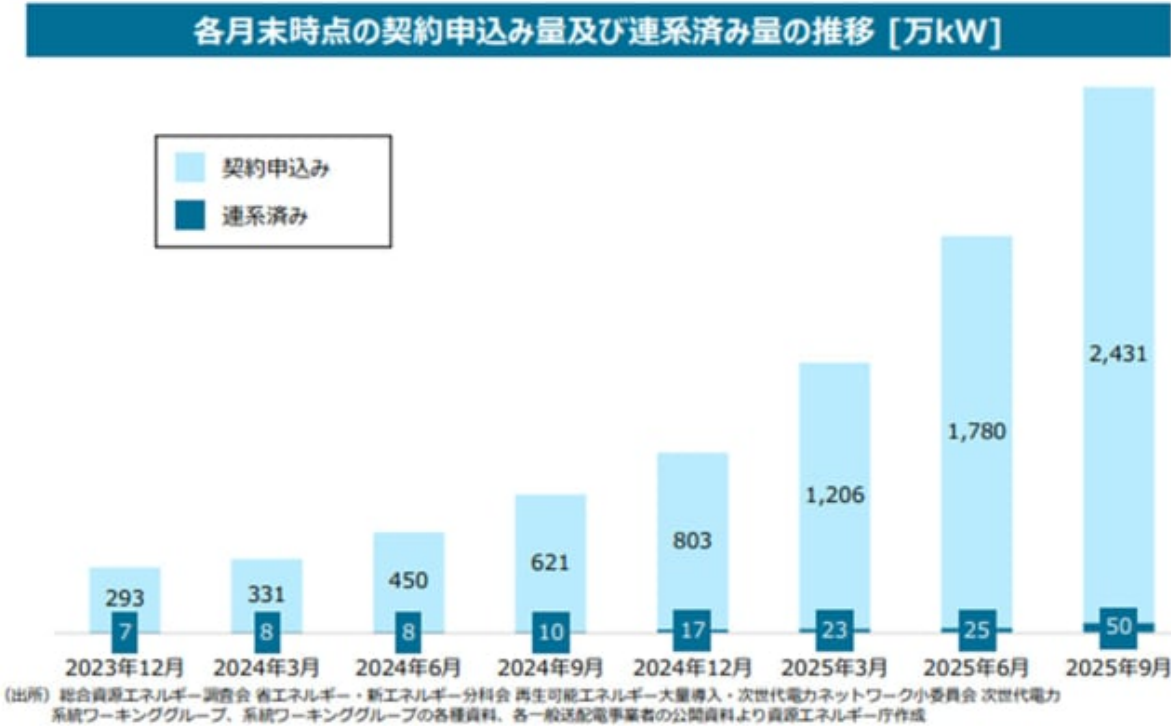
再エネ賦課金
現在の国民負担
年間 **3.1** 兆円超*

*2024年度 (経済産業省推計)

UTILITY
BATTERY
STORAGE

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2026817??20263???19
1GW?19,100?kW????????

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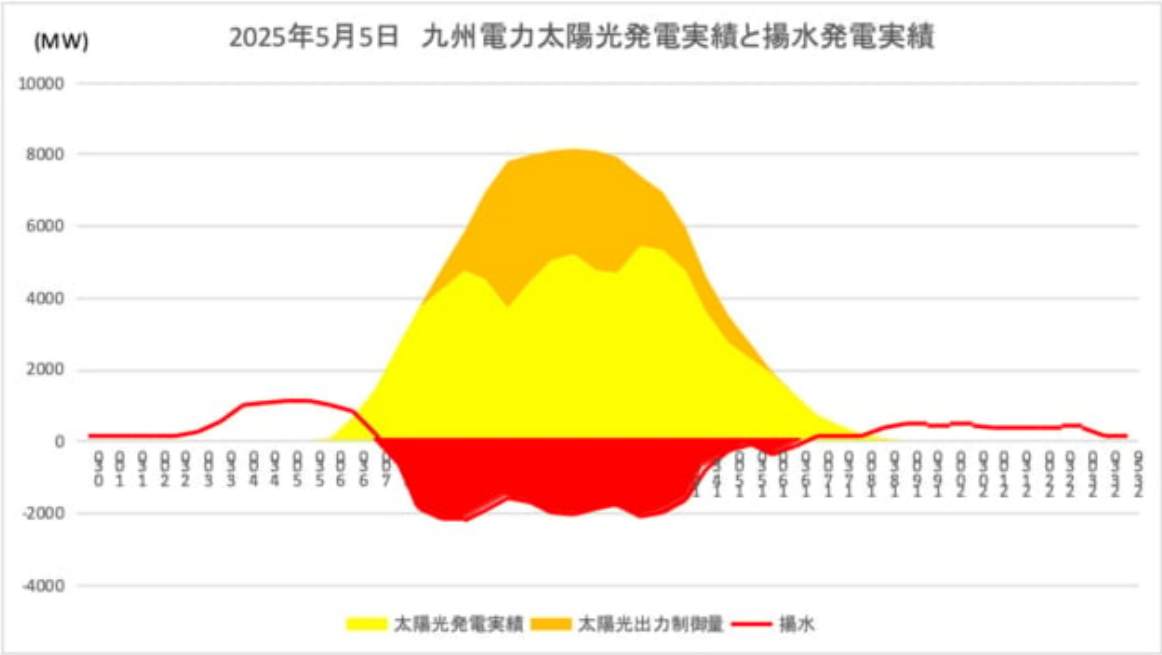
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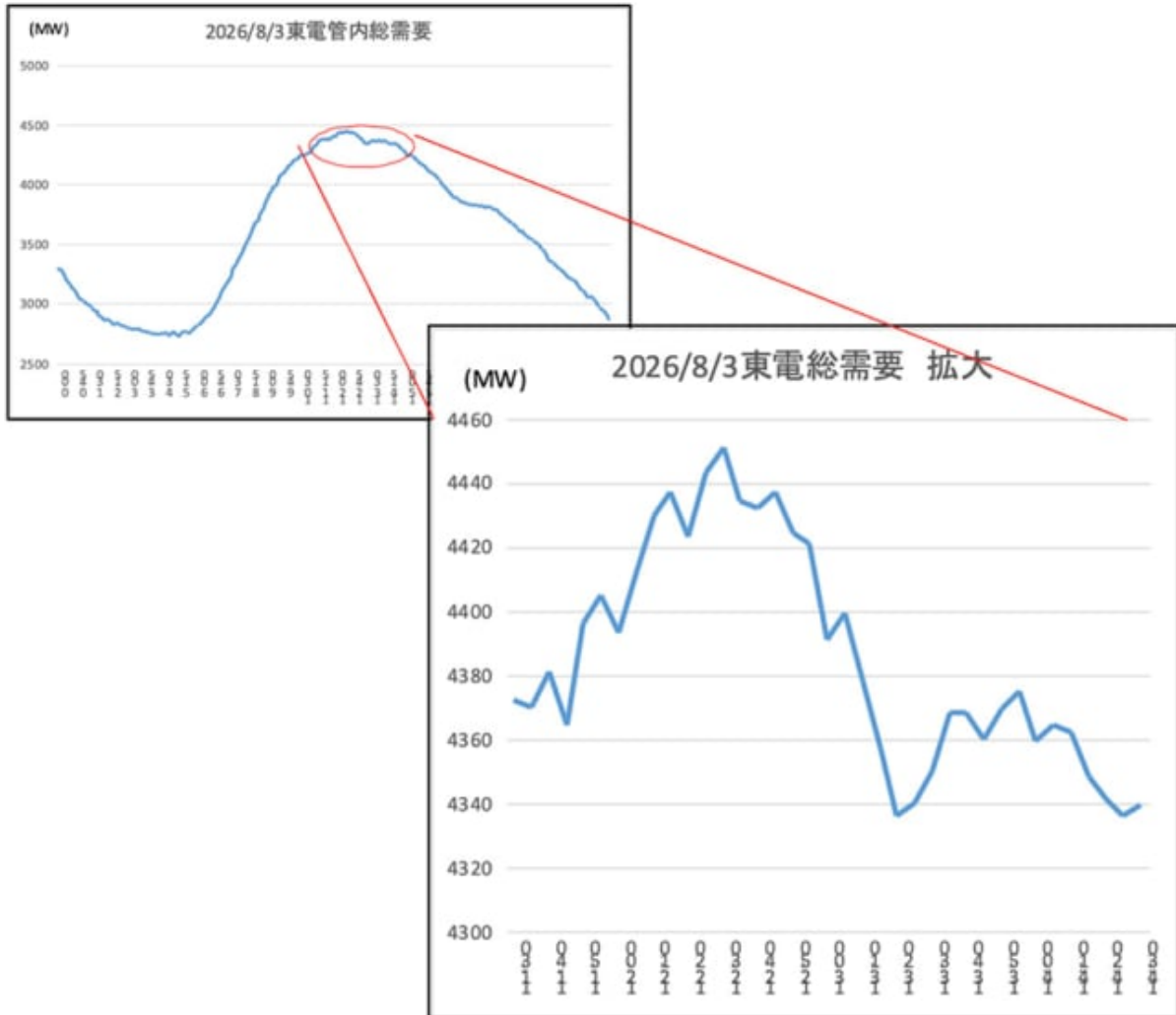
2??7:30????????
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????????2026?6????????????????????41.6??/kW????3.4????0.7??/
kW/????????

19,100?kW × 41.6??/kW = 79.5????

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???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??

7.7??

191GW7.7??

7.7??

7.7??

20247,707kWh?

7.7??

7.7?? ÷ 7,707kWh ? 10.0/kWh

7.7??

20243.49/kWh

191GW
OCCTO

1

2

	資源エネルギー庁資料 系統WG	資源エネルギー庁資料 分散型エネルギー推進戦略(WG)	OCCTOの将来需給シナリオ	
	2030年度導入見通し	2040年度参考試算※3	2040年度参考試算	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

1

	2025年9月現在実績				
	実績連系量	連系申込	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????????????????????

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19.10.2026

[illegible]

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- 77 / 79 -

19.10.2026

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GX????3.2??
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3????????????????????????????^{25?}

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?4????????????????JOGMEC????????????????????2026?9?1????

?5????????2026?6?5????????????????????2026?9?1????

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