

??19????NZBA????????

????????NZBA????41??119????10?27????70????
10,500????39????NZBA????2050????
????

??NZBA????19????

????NZBA????NZBA????

????
????

????JP????

????1????Consumers'
Research????ESG????
????

????NZBA????NZBA?NO????

ESG Watch: Banks' net-zero pledges in the spotlight at Climate Week New York

????ESG????UBS????

????BLK????ESG????BLK?ESG????
????UBS????700??585????

????BLK????3????ETF?MMF????8????BLK????

????

AG Paxton Demands BlackRock Account for its Underperforming, Potentially Illegal 'ESG' State Pension Fund Investments

????BLK????

????JP????

????1860????ESG????8????ESG????

Governor Ron DeSantis Eliminates ESG Considerations from State Pension Investments

ESG????NZBA????

Posted in ???, ?? | No Comments »

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

?? ?? · Thursday, October 27th, 2022



RapidEye/iStock

????????????????Die Zeit????????????????100????????????????Bjorn
 Stevens??

??
 ???

??
 ???

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

???????
 =alarmism??

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

??

??

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

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

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

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

??most
alarming stories????????????????????????

??

??
????????????????????????far from certain??

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

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

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

??

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

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

?????PIK????Stefan Rahmstorf??

??
??

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

????????????????????????????????CO????????CO????????2????????????????????
?2020?IPCC????????????????2.5?4????????????????????????????????????

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

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

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

??

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

??IPCC????????????2.8??
????????????

?

??????????????????_?? ?????????????????????



Posted in ???, ????? | No Comments »

2050???????????????????? ?

GEPR??? · Monday, October 24th, 2022

?? ??



Parradee Kietsirikul/iStock

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

2021??GHG????????????????IEA??2050??????

??GH
G??

????2050????GHG??20
50????GHG??

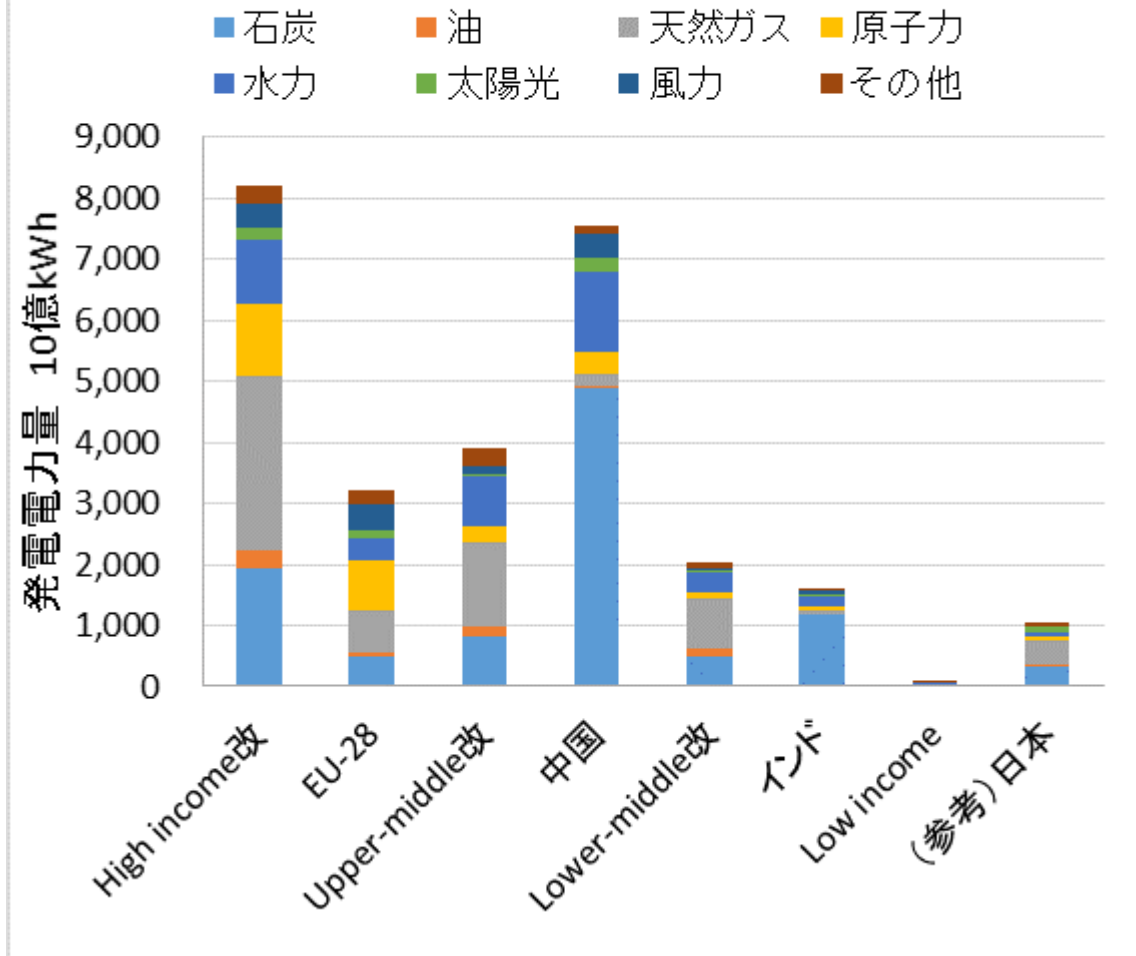
????2050?????????????????? ??

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

GHG??-6
?2019??IEA????????????????????????????
????????????????

図-6 発電電力量(2019年)

出所:IEAデータベース



26

図-6のデータによると、2019年の世界全体の発電電力量の約65%は石炭と天然ガスによって供給されています。これは、化石燃料の依存度が高いことを示しています。また、中国は石炭を最大の発電源としており、その量は約5,000億kWhに達しています。

一方で、再生可能エネルギーの発電量は、太陽光と風力を中心に増加傾向にあります。2019年には、再生可能エネルギーの発電量は全体の約7%を占めており、これは2013年と比較して大幅な増加を示しています。また、EU-28やインドなどの地域では、水力発電も重要な役割を果たしています。

GHG（温室効果ガス）の観点からは、石炭と天然ガスの発電は比較的高いGHG排出率を有しています。一方、再生可能エネルギーの発電はGHG排出率が非常に低く、気候変動の緩和に貢献しています。したがって、再生可能エネルギーへの移行は、持続可能なエネルギーシステムの実現にとって不可欠な要素です。

表-2 太陽光発電と風力発電の総電力量比 %

グループ	太陽光発電	風力発電	合計
High income改	2.6	4.6	7.2
Upper-middle income改	1.0	3.0	4.1
Lower-middle income改	0.8	1.0	1.8
Low income	0.8	0.6	1.4
EU-28	4.1	13.4	17.5
中国	3.0	5.4	8.4
インド	3.1	4.3	7.4
(参考)日本	6.6	0.7	7.3

??

????????????9% ??High income?????????-6??GHG??

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

??GHG??capacity factor????????????

????????????????EU-27????????????????????????30-35% ???

??

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

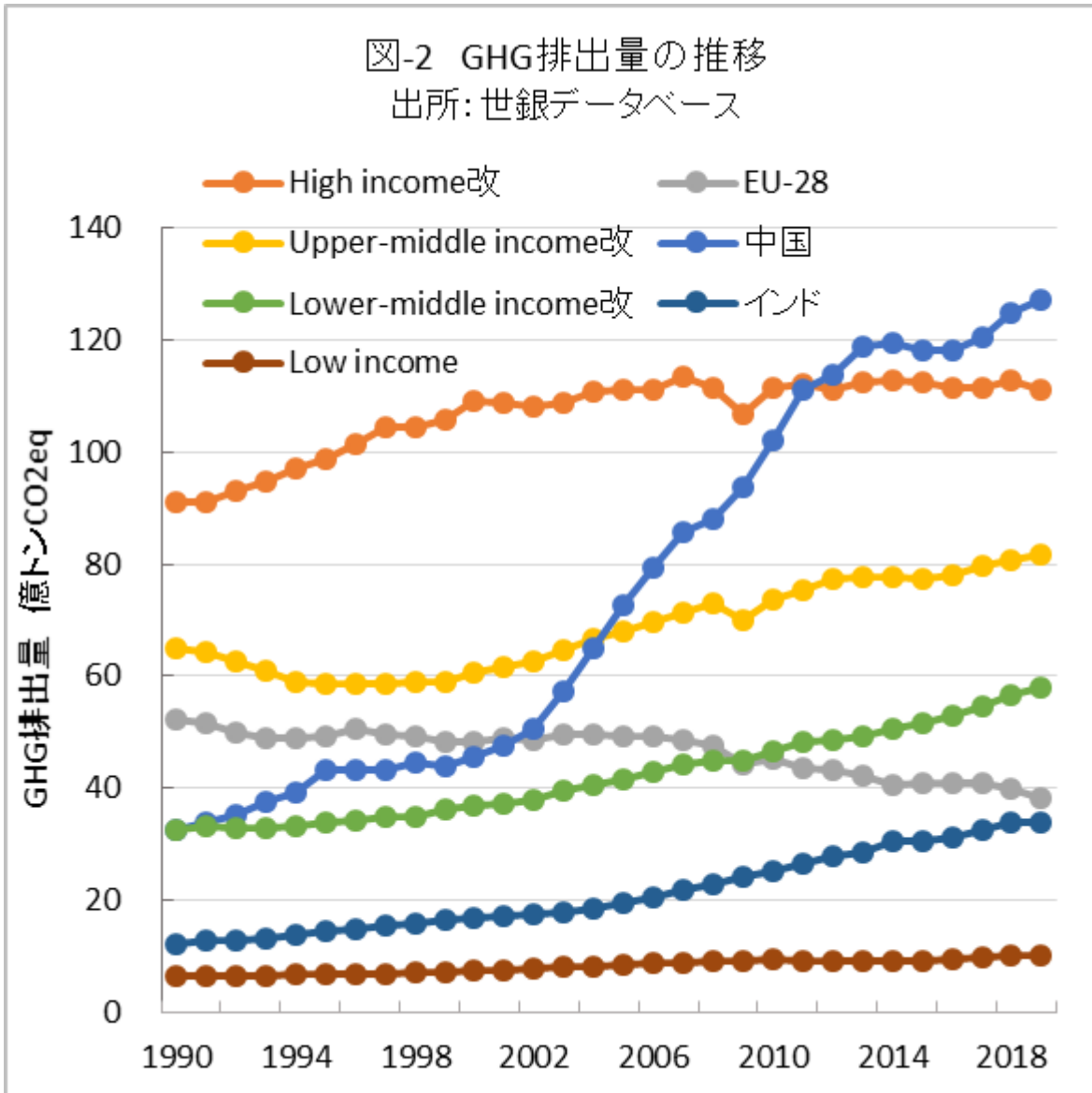
??

??

??2??% ??

??

????????????????????GHG????????????????????????????????Upper-middle income????????????????????????????????Lower-middle income??

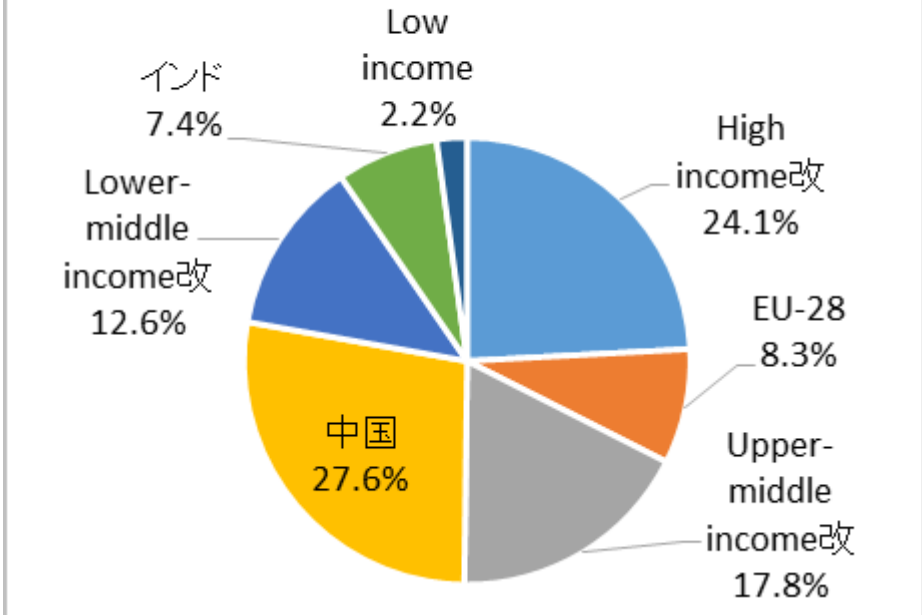


??

?-3?2019??GHG????????????????????1/3????????????????2/3????????????????GHG????????????2%??
????????????GHG????????????????????????????

図-3 GHG排出量割合(2019年)

出所: 世銀データベース



23

2050??GHG??????EU-28?GHG????????????GHG??
 ?GHG??????????EU??GHG????????????????????????????????
 ???

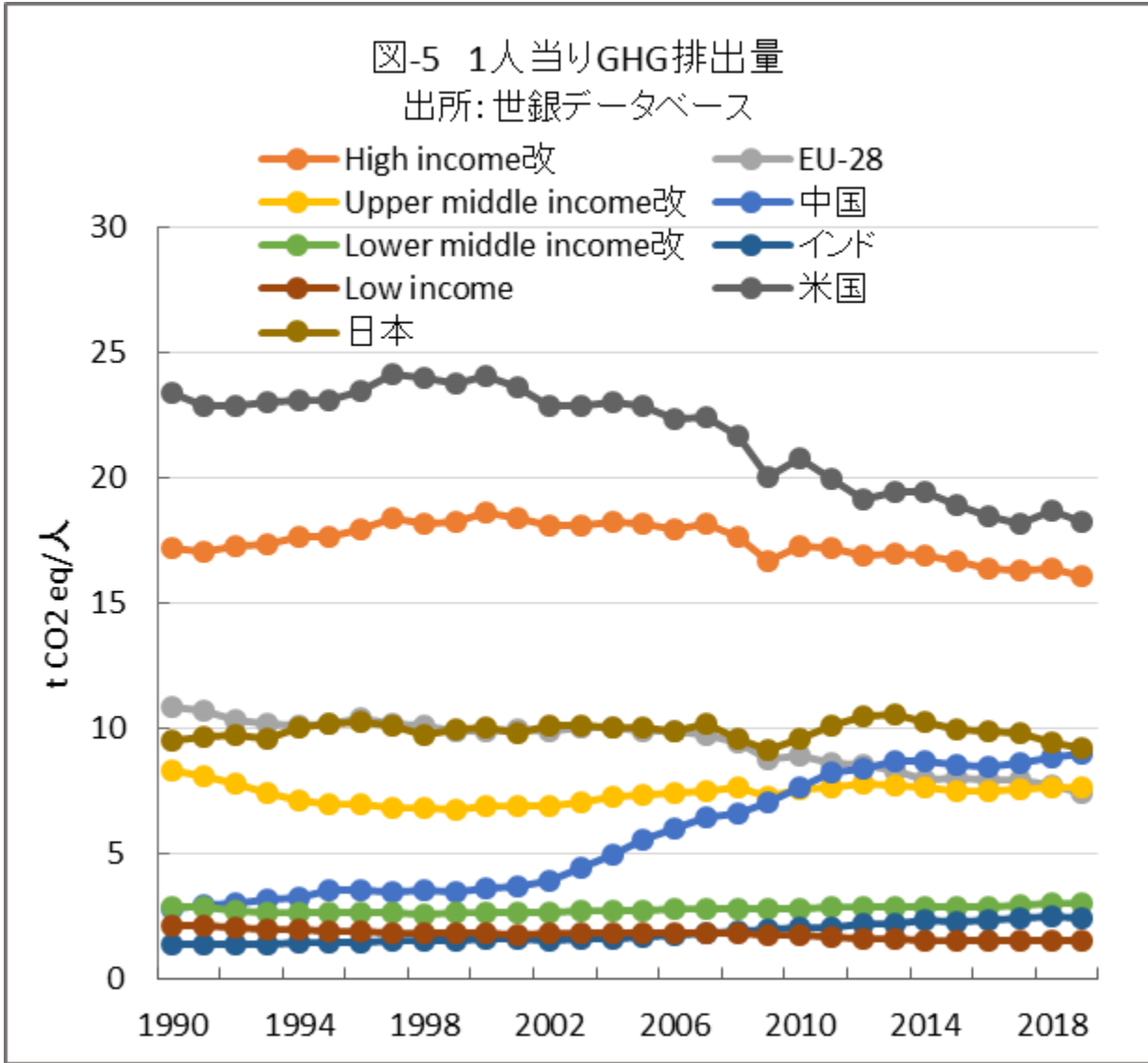
High
 income???2019?GHG??90%??????
 ??????2060?????2050??

??GHG????????????????????????????????
 ?????????????GHG????????????????????????????

?GHG??????????????

2050?????GHG??

?-4??1?????GDP?????????????-1?????????GNI??GDP????????G
 DP?GNI?????????????????????????????GDP?GHG????????????????????????1????????????????????



25

GHG????????EU????2019??1????????????Upper-middle
income?EU-28????????????1990???GHG????????????????????EU-28???High
income??GHG?????2????????????????Lower-middle
income????????????GHG????????????????????

??2????????????????????GHG????????????????????

????????????????????GHG????????????????????

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

????????????????????????21???CO2????????????????????GDP????????????CO2????????
????CO2????????????????????????????????

????????????????????2050????????1.5??
??
??



LewisTsePuiLung/iStock

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



NEW – UN Secretary for Global Comms says they "own the science" on "climate change," and opposing viewpoints have now been pushed down in search results through their partnership with Google.
pic.twitter.com/fMaPYsHGUT

— Disclose.tv (@disclosetv) October 2, 2022

??????9????????????????????WEF??
???

?Tackling

Disinformation??COVID-19????????????????????????????????
????Google??

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

- ???
- ??????????Google??
- ??????????????????own?????

You Tube??TikTok?????????Team
Halo????????????????????????

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

??

twitter????????Democratic Dictatorship?George Orwell????????????????

????????????????1984????????Animal
Farm??
????????????????????

????Tackling
Disinformation????????????????WEF????????????????????COVID-19????????????????????????????
????????????????????????????

??

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

Posted in ???, ????? | No Comments »

ESG????????3E?S????????????

?? ?? · Thursday, October 20th, 2022



ipopba/iStock

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

??COP26????????????ESG????????????

???????

?????????

????ESG??

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

????????????2015??



??World Energy Investment 2022, IEA

????????2015????????????????????????????????????25????????????

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

??

??IEA????????Net Zero by 2050????????2050????????????????????????????????1.5????????????????????????????????
????????????????8????????????????2050????????????????2????????2030????????3????2????????
????????????

????????2050??IEA?21????????World Energy Outlook
2021??STEPS????????2030????????????????
????????????????8????7????1??

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

ESG?

ESG
ESG

Economy Environment Energy

Security ESG 2011 Security ESG
S

ESG

ESG E

Social?
S Sustainability ESG S

ESG 2.0?

ESG ESG

2050 2030

ESG ESG

ESG 80

10 ESG

ESG

ESG ESG 2.0

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

????????????????????????????????????COP????????????????????COP27????????????????

COP26??

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

Reuters????????????????????????????????????Africa Oil Week 2022 Conference????????????

- ?????????????????????COP27??
- ?????????????????????????????????????1??
- ???
- ???6????????????????10????????

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

2021?4????????????????????????????????????COP26????UNFCCC Race to Zero????????????????????????????????GFANZ????????

GFANZ????????45????????500????????????????GFANZ????????????Race to Zero????????????

????COP27????GFANZ????????????????????

??Climate Change Dispatch????????????JPMorgan Chase, Morgan Stanley, Bank of America????????????????????????????????GFANZ????????????????????????????????

U.S. Banks Threaten To End Support For UN Climate Edicts Over Legal Risks – Climate Change Dispatch

?GFANZ??GFANZ????????????????

????????????????????2050??

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

??JPMorgan Chase
????????????CEO????????????????????????????????????

????CEO??CO₂????????

‘Road to hell for America’: JP Morgan CEO snaps back at Rep. Tlaib on fossil fuels



Posted in ???, ????? | No Comments »

??

?? ?? · Monday, October 10th, 2022

??????????

????????????????????????????????250????????????????????



??

??210??????????????

3????????????????1000?????????....??????12????????????????????



??3????????????1000?

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

??

????????????????????????????2000????????20????????3????????????????1000????2??????????????



allanswart/iStock

??
??

??
??

1??
??

??

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

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

?? ?? · Tuesday, October 4th, 2022



Daniele Mezzadri/iStock

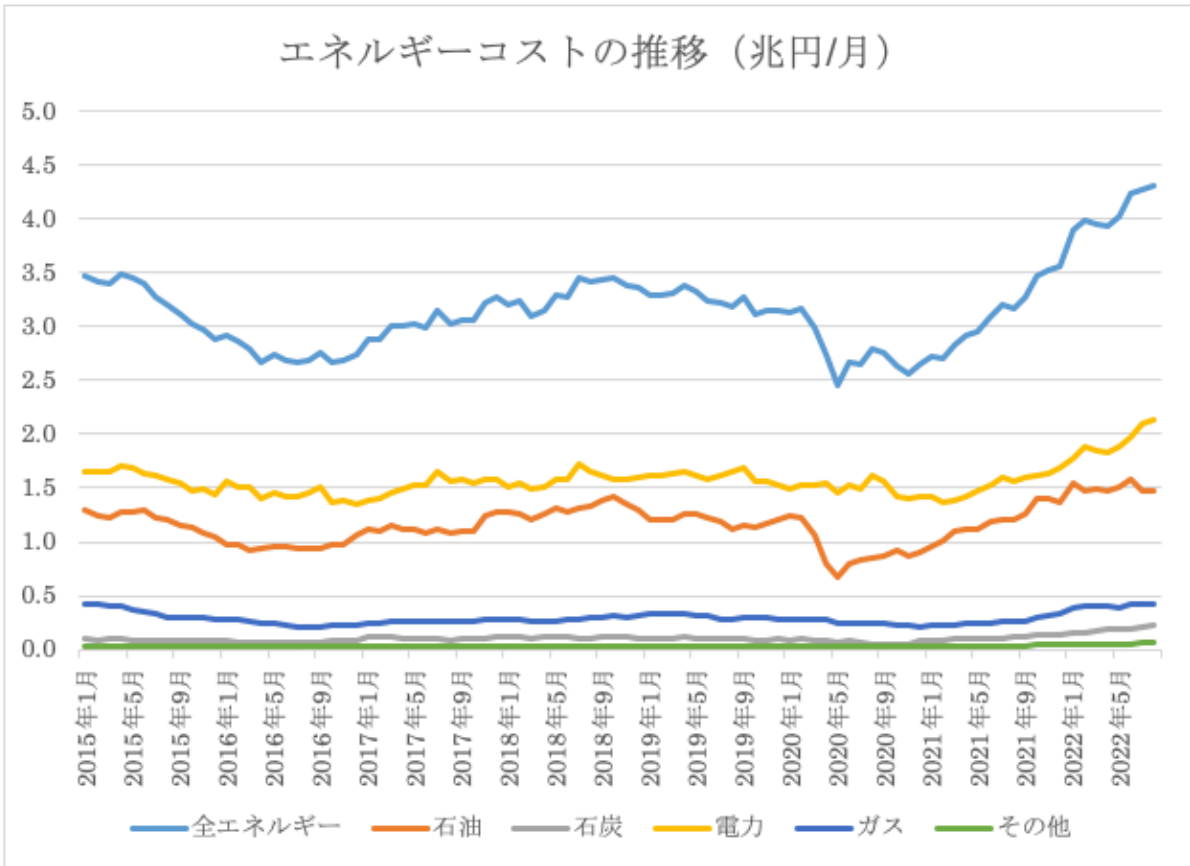
??25????????28????????????????

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

??
??

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

??



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

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

??2022年8月????????????4.3????????2.1????

??

??

??

??

??

?

????????????????_?? ?????????????????



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

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

?? ?? · Monday, October 3rd, 2022



??

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

??

????????????????8??7????????????????????????????????9
5??????????????

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

??

??6?21??????????

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

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

??

????3????29??
??
??????

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

????????????????????????????????12????????????????7?4??????????????

??

????????????????95%??
??
?

????????????5%??
??????????????????????

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

????74??EU????????????????????????????

??

??

??

??

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

?

????????????????_?? ?????????????????



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

????????SRZ1200????

?? ?? · Sunday, October 2nd, 2022

????DX??

??????

??

??

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

NHK????????????????????????????

?? ?? · Sunday, October 2nd, 2022



???NHK??
 ???

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

? ?????????NHK????????????????????????????????

?????5????????????????????????????????

??

?2020??CO₂????????????

??28.4??14.7??6.9??4.7??3.2??2.1??1.8??3.7??

????????3.2????????12????????12????????????????????????????????0.0003????????

????????????10??100????????????????????????????????????2025????????GDP?2010????????

2??

??12????????????????????

??2050??1.5????
????????????1.5??

????1.5??

??

??
??

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

2021?8??2030????????????????????????????2030????????1kW
h????8.2?11.8??

????????????????LCOE????????????????LCOE????????????????????????????J.P.????????
????????????????????????



????????????????LCOE??LCOE????????????????
????????LCOE??i)????????????????????
? ii)???????????????? iii)????????????????????????????????????

??LCOE??
????5????10????????????

??LCA????????????????1
0????????????????????????????????

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

????????CO₂??
?????

??21????ESG????????????????????
????????????10?350????????????????????ESG????????????????

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

??JP????????????????CEO????????????????????????????????

??
????????????????????????????????2015????????????????????
??



small smiles/iStock

????2030????????????4??1????????????56??????1??????100????????????48??
??

????????????????????2025????????????????????????????????150????????????????
????????????????????????3????????????50????????????????????10????????????500????
??????

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

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

??

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

??OCI
NV??9????????????????????????????????????OCI????????????????????
????Volkswagen AG????????????????

??SA??
????2????????????????????????????????????

????????????????????BASF????????????????????????????????????
????????????????????

??????????

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

?? ?? · Saturday, September 24th, 2022



halbergman/iStock

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

8?16??

??3.5????????????Build Back
 Better(??????)????????????????????????????????????10????7370????????4370????????????????????????3690
 ?????52??

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

??2030????????2005????????????????40????????????
 ???CO2????????????????????2030????25????????
 ???

??50?52????????????????????????????????
 ?????????????????10?12????????????????????

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

??

?? or EU????????????????

??3??3????????????44????2020????????????????????2
????????????15????????EU????????????????????????????8????3????????

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

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

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

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

??
??EU??

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

????????????????20??EU????????????????????
??
????????????????

??
????

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

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

?? ?? · Sunday, September 18th, 2022

????????????????1??103????????????????2????????????



??2005??
???Wikipedia

CNN???????????



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

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



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

???KYODO?????????J??
????????????????????????????????????

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

2006??60??????????????????????

2010??



??

??
??
??????

??9????????CO2????????????
????????????????????????????????????

??2????????IPCC????????
????????????????

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

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

??10????????????????????
????????????????????????CO2????????????

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

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

??NGO????????
????????????????????

??11????????????????
????????????????????????????

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

????????????????1960????????????????
????????????????

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

????????????????2050????????????21????
????????????????

????????CO2????????COP????CO2????????CO2????

CCS

CO2

12 CO2

10 15 CO2

FIT

13 CO2

(EV) EV

CO2

2050

14

3

???

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

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

?

Posted in ???, ????? | No Comments »

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

?? ?? · Thursday, September 15th, 2022



igorartmd/iStock

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

????????????????????????????7?????3??????

??

??

20??

??

??

??

?????EU?????????2??15????????????????10?????????

??

??????Fertilizers Europe?????????EU????????????????????????????????

??

??

??

??

??

??

??

??
?????

??

??

?



herraez/iStock

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

CEO????????????????????????????????

??40%????
??????????

??2.5????????????
??????????2.8??????????3.8??????

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

??

??????????????1973??

??

??

Posted in ???, ?? | No Comments »

??21????????????????ESG????????????

?? ?? · Saturday, September 10th, 2022

ESG??
????????????????????????SDGs??2015????????
?????ESG????????????????????

????????????????????SDGs??ESG??SDGs????????????????????
????????????????????????????????????

?????ESG??



LumerB/iStock

8?16????21????????????SEC????ESG????????????SEC????????????

8?23????????????ESG????????????

8?24????????????10?350????????6????????13??

????13????????????

??13????????????????

??

??

????????????10????????????BNP????????????UBS ?????????

????????????????????8?24????????????????????????????????????1000??

350????????ESG????????????????????????UBS????????????????

??



????CO2??2030????1000?kW????????????
????????????????????

??253????????????????
??
????????????????????????????

??LNG????10????????????????????????????
??8?26????

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

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

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

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

????9?5????????????????????????????????3????????2????4????????????????????????????
??

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

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

??
????????

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

????????????14????????

?? ? · Saturday, September 3rd, 2022



ayhan turan/iStock

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

????7????????????????14??



??????372????2420????????????????????176????1650????????????????????

????????????????????????????????????QR??
????????????????????????????????????

????????????????????????7??CO2????????????????
????????1958?2022?4????CO2????????????????????

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

CO2 CO2 150 ppm

1 30 0.2 0.3

2 IPCC

3

3 80 60

HP 10 1950 60 1993 30

4 CO2

1000

() CO2

5 CO2

NHK

6
CO2 1850

CO2 100 mm 23

CO2 CO2

()

7
CO2 CO2 CO2

170 2000 42
CO2 CO2 CO2

?

???

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

Posted in ??, ??? | No Comments »

LCOE

?? - Thursday, September 1st, 2022



vchal/iStock

IRENA J.P.Morgan

IRENA

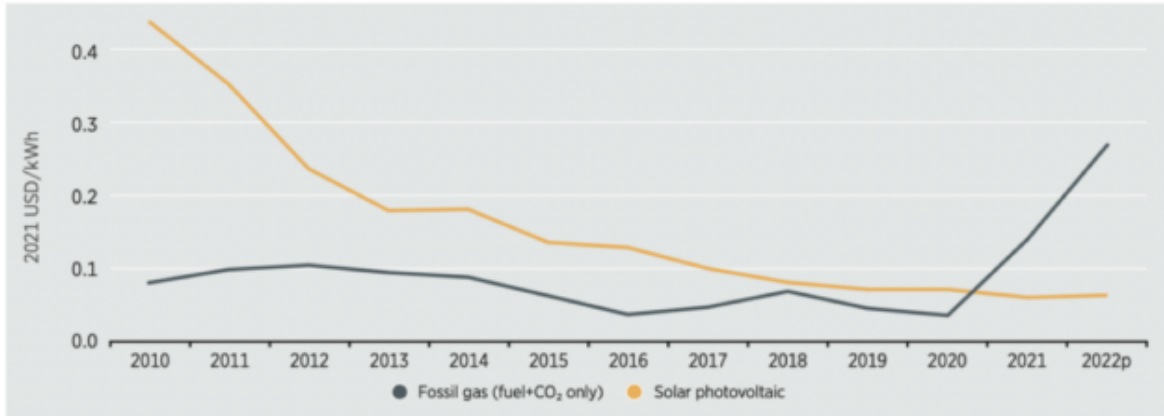
2022 13 IRENA 2021

Renewable Power Generation Costs in 2021 – Executive Summary (irena.org)

IRENA

- 2021 163GW LCOE G20
-
-

Figure ES.3 The weighted average LCOE of utility scale solar PV compared to fuel and CO₂ cost only for fossil gas in Europe, 2010-2022



?????2021?8?????????????2030????????????????????

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

??

2. J.P.Morgan?????

?????5?J.P.Morgan?????????????????

12th Annual Energy Paper | J.P. Morgan Private Bank (jpmorgan.com)

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

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

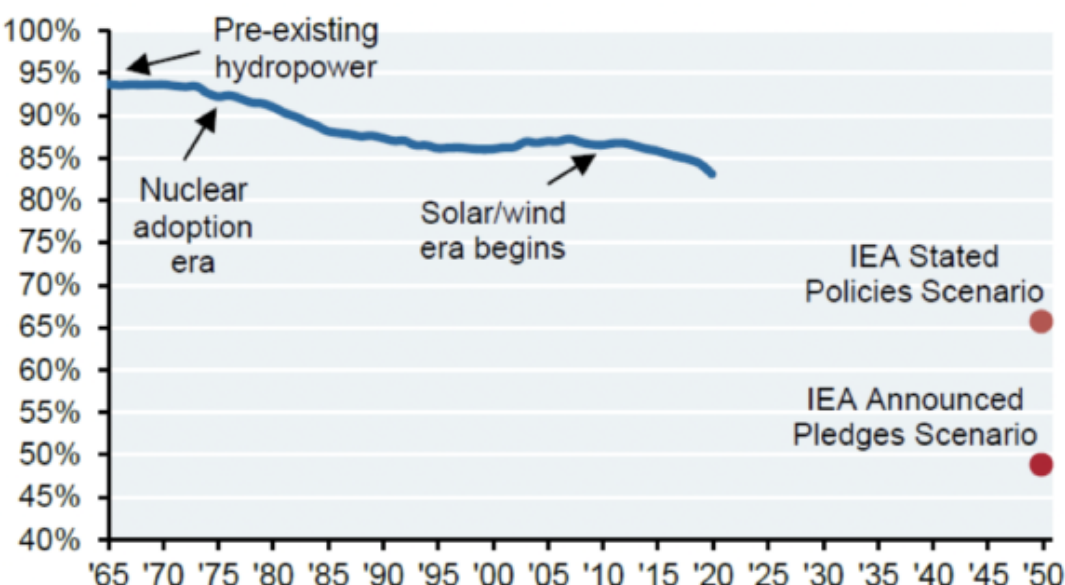
?2050??????

IEA????????????????????????????2050????????????66?????

??10????????????????????????
????????????????70???

The world uses fossil fuels for ~83% of its energy

% of global primary energy consumption from coal, oil and nat gas



Source: BP Statistical Review of World Energy, IEA, JPMAM. 2021.

???????

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

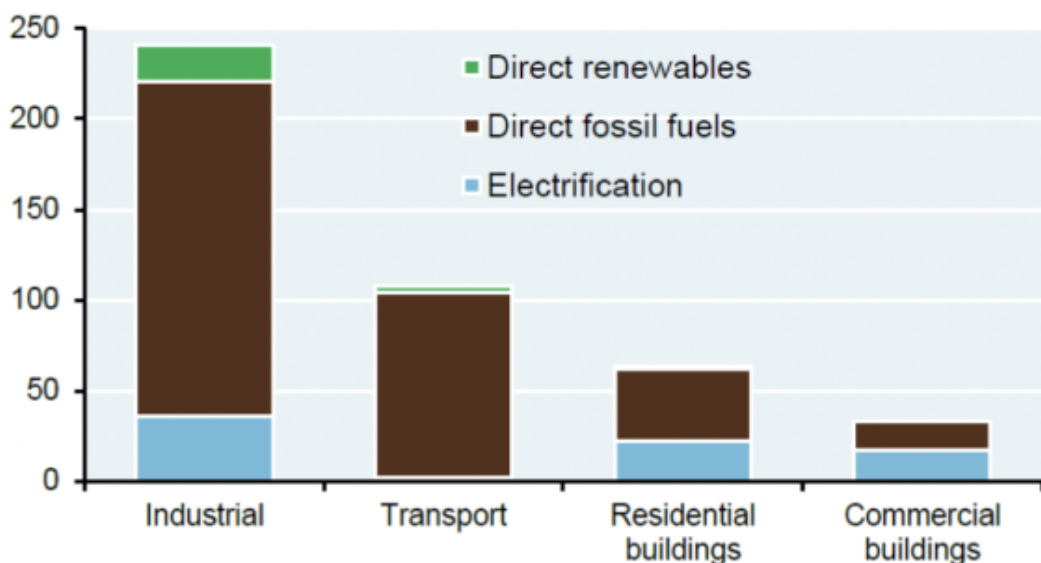
LCOE??i)???????????????????????????? ii)????????????????
iii)??

?????????

??

Low levels of electrification in global industry and transport

Quadrillion BTUs of final energy consumed by sector



Source: Energy Information Administration, JPMAM. 2021.



imagedepotpro/iStock



???
 ??????????200?????????11??
 ???

??????? 8? Reuters?

?????????????????????COP?????????1997??COP3????????????????????????????COP3?1997??12?????????
 ?????????????????????????????

COP??
 ?? ???

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

COP?????26????????????????????????????COP?????????????????2015??COP21????????????

???1.5????????????????????????????NDC?????????????????5?????????
 ?????????????????????????

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

COP?????????????????????26??

???CO₂????????????????CO₂????????????????????????????
 ?????????????????????????COP??

??2030????5800????????????

2?????COP27??
????????????????????????????????

Posted in ??, ???? | No Comments »

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

?? ?? · Sunday, August 28th, 2022



marrio31/iStock

????????

8?24????2?GX(????????????)????????

????????????GX????????????????????????????????4????

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

?6??26????

©Westinghouse Electric Corporation.

Current Plants) safety by design (passive safety)
AP1000 ESBWR
ATMEA EPR APWR ABWR
AP1000

ABWR APWR ATMEA

ABWR APWR ATMEA

ABWR APWR
ABWR 6 7 3 11

ABWR ABWR

4 3 4 PWR APWR
APWR safety by design
ATMEA


Posted in , | No Comments »

Friday, August 26th, 2022

GX

ATMEA

7 10

	【新規建設に向けた方針等】	【既設炉の運転延長に向けた方針等】
 アメリカ	<ul style="list-style-type: none"> エネルギー省「革新的原子炉実証プログラム」等 2 炉の建設支援、8 炉型の研究開発支援 (2020) 老朽石炭火力をSMR等で置換可能と分析 (2022) 	<ul style="list-style-type: none"> 運転期限なし (40年+20年単位延長) 現時点で80年までの運転延長認可は6基 さらに9基について審査中
 イギリス	<ul style="list-style-type: none"> ジョンソン首相「エネルギー安保戦略」(2022/4) 2050年までに発電割合を25%に、24GWの導入 1基/1年に建設ペース加速へ、支援を抜本拡充 	<ul style="list-style-type: none"> 運転期限なし (10年ごとに安全審査) 2035年に40年となるサイズウェル原発で 20年延長を検討中
 フランス	<ul style="list-style-type: none"> マクロン大統領「新規原子炉計画」(2022/2) 2050年へ大型革新軽水炉14基を建設・検討 建設・運営主体の電力会社EDFを完全国有化 	<ul style="list-style-type: none"> 運転期限なし (10年ごとに安全審査) 56基中20基が40年超運転へ 運転延長も対象にグリーンファイナンス検討中
 オランダ	<ul style="list-style-type: none"> 新連立政権「政策協定」公表 (2021/12) 新たに2基を建設する方針を表明 	<ul style="list-style-type: none"> 運転期限は法律で規定 (期間のルールなし) 60年運転認可済の原発の再延長方針を表明
 韓国	<ul style="list-style-type: none"> 尹大統領「エネルギー政策の方向性」(2022/7) 2030年原発割合30%以上、国内2基建設等 	<ul style="list-style-type: none"> 運転期限なし (10年ごとに安全審査) 既設炉の継続運転手続きの迅速化を表明

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

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

??3??????ABWR???

?????????(SMR)

????

?????

????ABWR????????????6?7????????2????????5????????????BWR????????????????
????????????????????????????

??ECCS????????????????
??

??

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

??APWR????????????????????3????
??ABWR????????????

SMR?????7?kW??

????????????????2029????????????????????BWRX-300?2030????????????

????????????????????2030????????

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

????????????????????3????????????SMR????????SMR????????????????????????????????

????????????????????SMR??1????
?????SMR????????????

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

????????????????????????300??1000????????
????????????????????

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

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

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