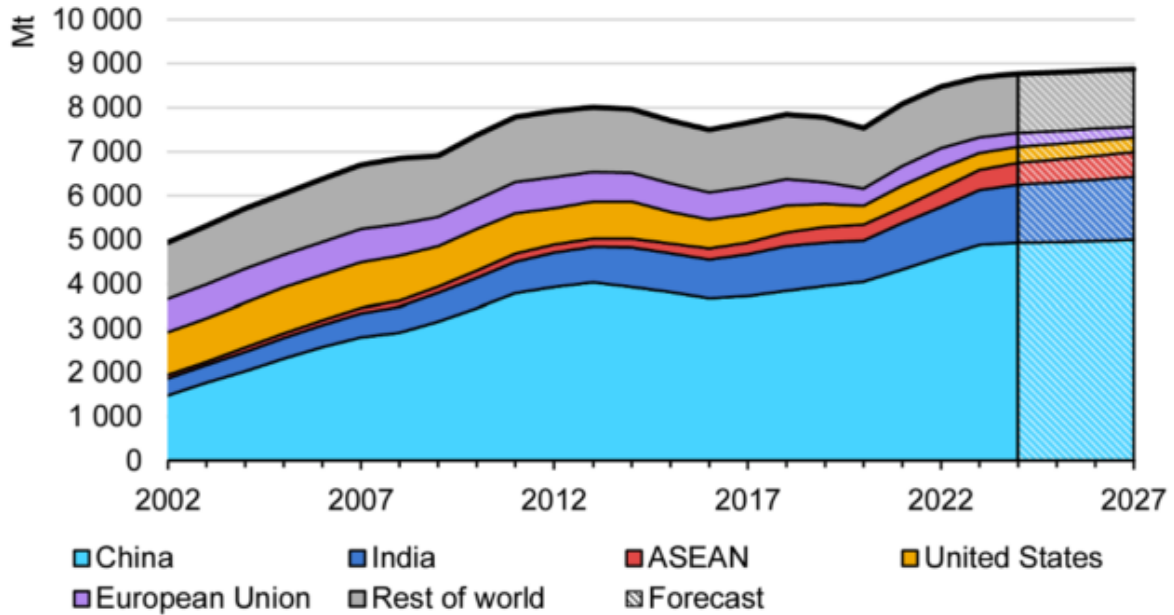


Global coal consumption, 2002-2027

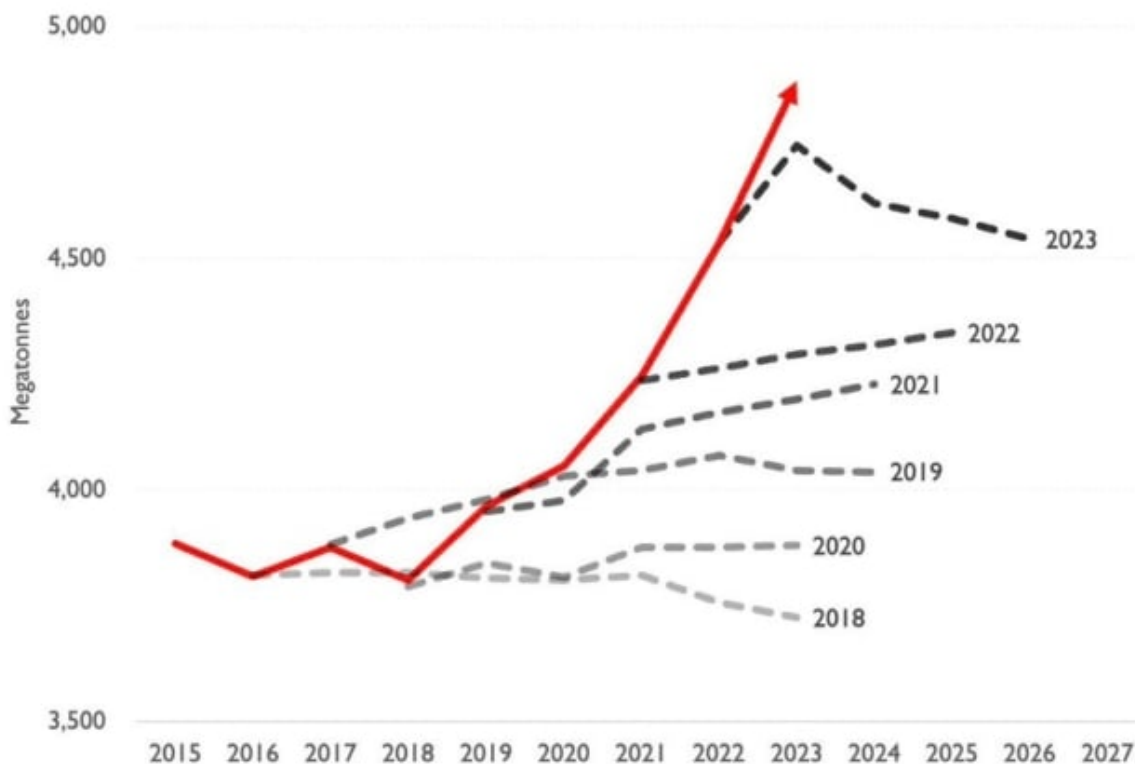


IEA. CC BY 4.0.

Coal2024??

????????IEA??
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China Total Coal Demand: IEA forecasts vs what actually happened
 Chart: Ed Conway, based on Thunder Said Energy



Ed Conway??X?????

IEA????????OPEC????????????????OECD??
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Posted in ??????????, ??? | No Comments »

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?? ?? · Saturday, December 21st, 2024



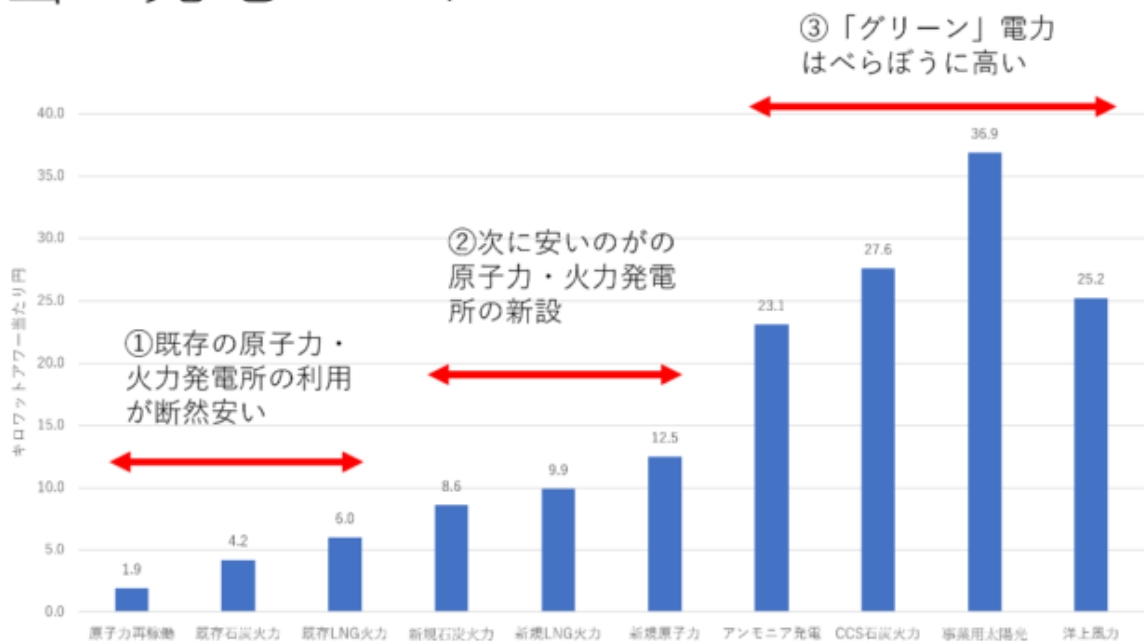
shotbydave/iStock

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2040??

本当の発電コスト



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??IEA????????????????????4.2??LNG??6.0??
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? drill baby
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Posted in ??????????, ??? | No Comments »

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?? ?? · Wednesday, December 18th, 2024

12?6??Net-Zero Banking Alliance?NZBA????????????????????????????????

????????????????????ESG????????????????????????????????NZIA????????????ClimateAc tion100+????????????????????????????????NZBA????????????????????

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Vitalii Petrushenko/iStock

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NZBA????2050??
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Posted in ??????????, ??, ???? | No Comments »

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?? ?? · Monday, December 16th, 2024



Douglas Rissing/iStock

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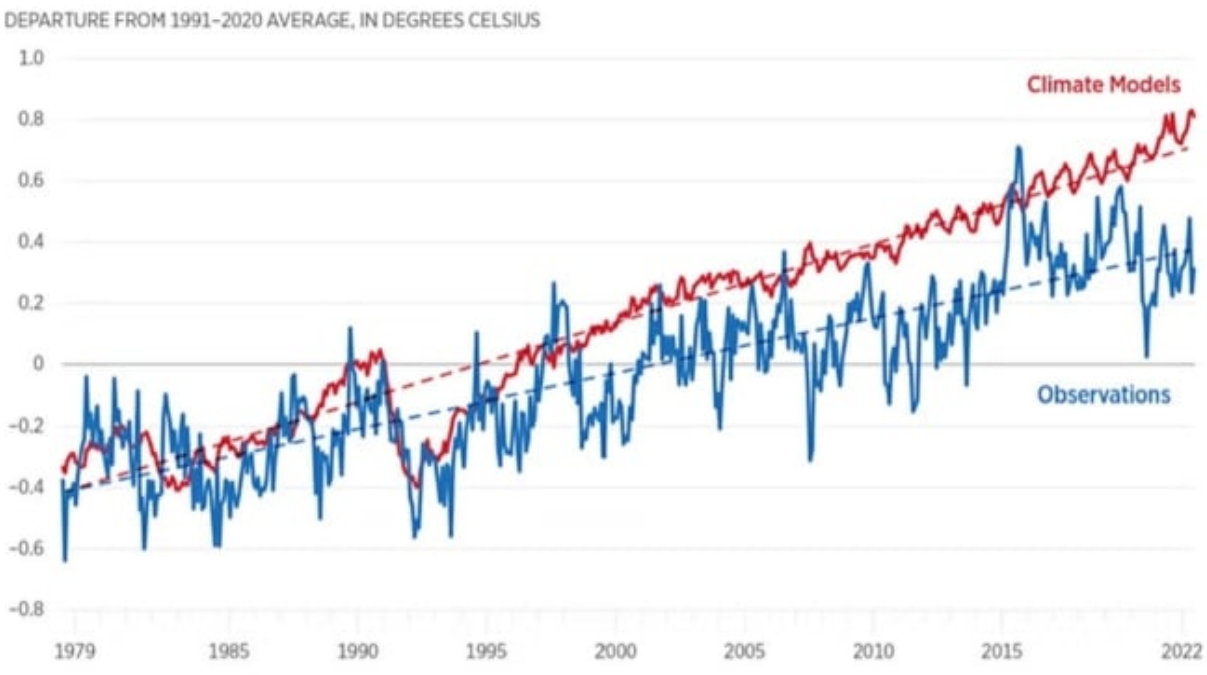
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Global Warming: Observations vs. Climate Models

Global Average Surface-Air Temperature Variations, 1979–2022



NOTE: Figures have been adjusted to align trends starting in 1979.
SOURCES: Author's calculations based on data from five different observation-based datasets and 36 climate models taking part in the sixth IPCC Climate Model Intercomparison Project, and KNMI Climate Explorer, "Starting Point," <https://climexp.knmi.nl/start.cgi> (accessed January 10, 2024).

BG3809 heritage.org

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IPCC??
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The Unreliability of Current Global Temperature and Solar Activity Estimates and Its Implications for the Attribution of Global Warming

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Posted in ???, ????? | No Comments »

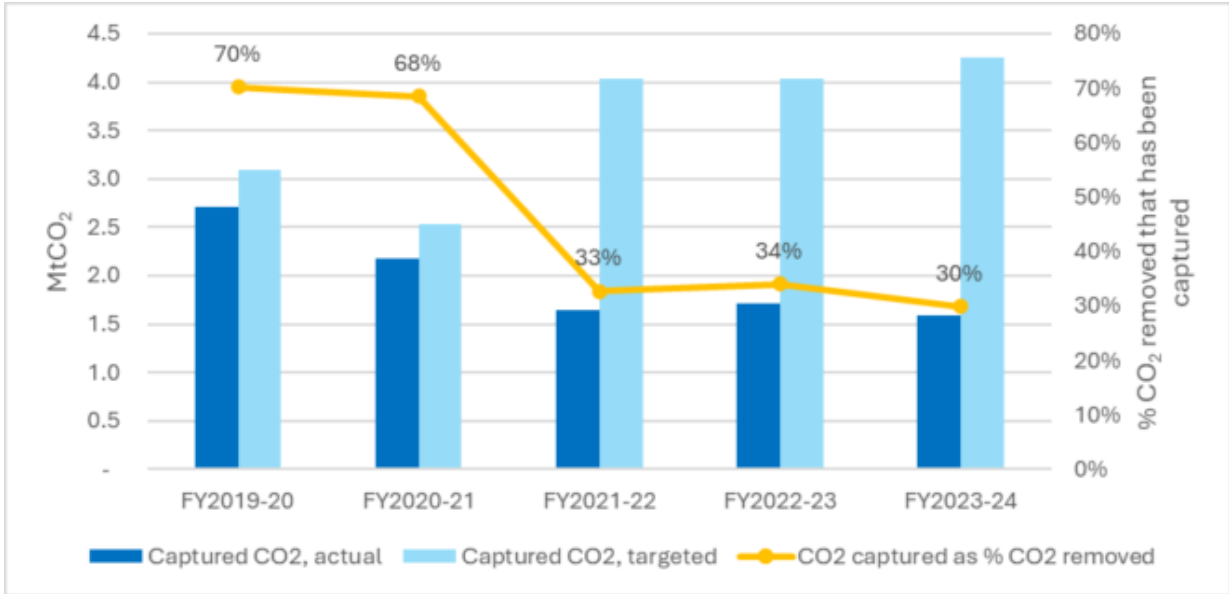
??????????CCS????????CCS???

?? ?? · Friday, December 13th, 2024



pcess609/iStock

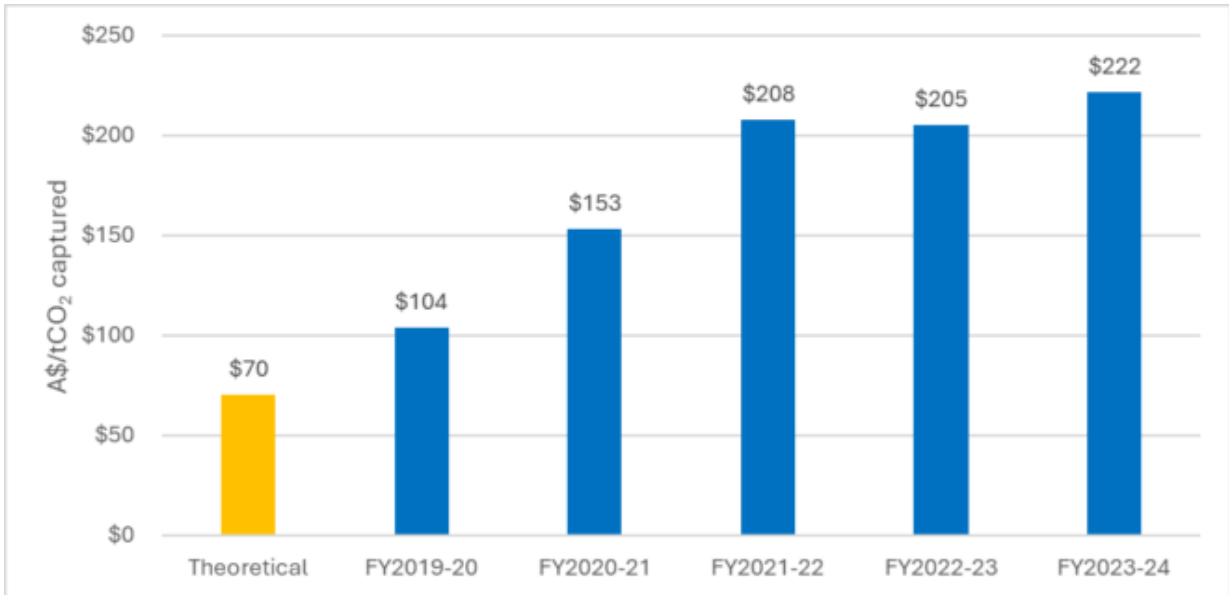
????????????????????????????????????CCS?Carbon dioxide Capture & Storage????????????????????????????????????CO2??



reneweconomy

2023 2019-20 10
2024 9 144 CCS

CO2 2019-20 25 2023
32 CO2 70 200
1 40



reneweconomy

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2017?4?7??



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

COP29????????

?? ? · Thursday, December 12th, 2024



COP29????????????

????COP29????????

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????2035????????1.3????????7????????3000????????8????2????????

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6?2????????????JCM????2??
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1.5?2023?1.5?2050?2035?3000?1.3?2035?3000?

2023?1.5?2023?2023?2023?2023?2023?2023?2023?2023?2023?

3000?1.3?2035?3000?

1000?13?3000?0?

drill, baby, drill)

4?4?EU?3000?10?

1.5?2050?

1.5?IPCC?6?1.5?CO2?2030?48?2035?65?2019?2030?9?2030?35?7.6?

2020?2019?75.8?10?

17?SDGs?15?9?

NDC?2?

1.5?

2024?2025?2035?NDC?NDC?UNEP?1.5?

COP30?NDC?NDC?

EU?

2024?10?BRICS?EU?CBAM?

Posted in , , | [No Comments](#) »

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?? ?? · Thursday, December 12th, 2024



privetik/iStock

?????1279?????????????????7?????????????2040?????????????????4?5?????????????????

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

COP29?????????

?? ? · Wednesday, December 11th, 2024



COP29??????????

11?16??24????????????????????COP29????????????COP29????????????????????

COP29??COP

2023??COP28????????????COP????????COP29????COP????

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NCQG???????

COP29????????2025????????NCQG?New Collective Quantitative Goals????????

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P21????????COP????????

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1000?100 billion USD?10?trillion USD?Not billion, but trillion?

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NCQG

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2000 NCQG 2000

9?1 shall provide?2?encouraged to provide or continue to provide?3?mobilize?

NCQG

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COP COP

COP28 UAE

UAE

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COP29?22?24?4?

NCQG

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

???CO2????????????????????????????
?? ?? · Tuesday, December 10th, 2024



NicoElNino/iStock

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

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?? ?? ? - Friday, December 6th, 2024



butenkow/iStock

1984 50

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2035??CO2?????60%????????????

?? ?? · Thursday, December 5th, 2024



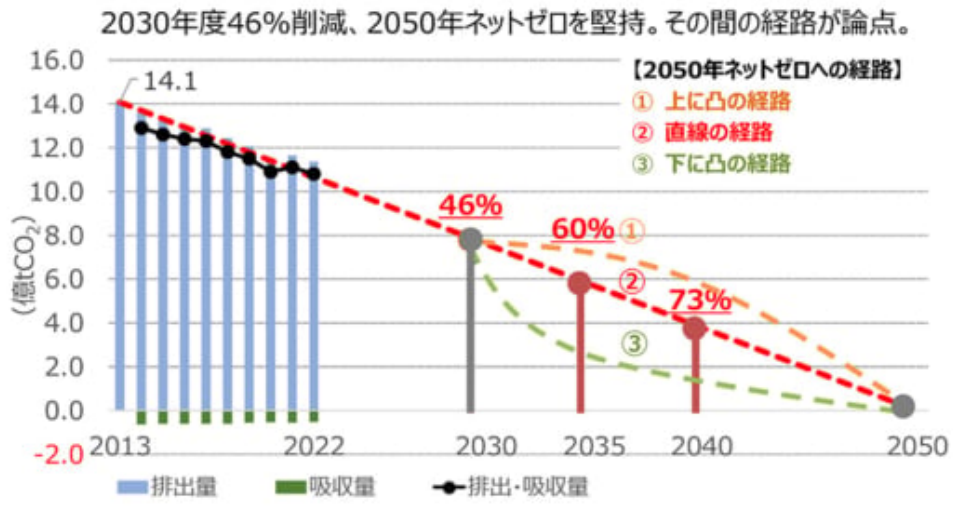
????????10?31????????2035??CO2?60????????????????????????????????????

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日本の排出削減の現状と次期NDC（Nationally Determined Contribution）水準



NDCについての代表的な見解

① 上に凸の経路	<ul style="list-style-type: none"> 技術の革新が生まれ、排出削減が将来加速することを踏まえると、上に凸といった考えもある。
② 直線の経路	<ul style="list-style-type: none"> 2050年ネットゼロと整合的な道筋を示し続けることが、企業・社会にとって予見可能性を高める。
③ 下に凸の経路	<ul style="list-style-type: none"> 世界平均以上の目標を掲げるという姿勢を示すことで、はじめて途上国が動く。

2030年度から先の削減目標、削減経路については、多様なご意見があったところ、**2050年ネットゼロ実現に向けた我が国の明確な経路**を示し、排出削減と経済成長の同時実現に向けた予見可能性を高める観点から、**直線的な経路を軸に検討を進めることとどうか。**

2035??60??

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

これまでの合同会合でいただいた次期目標に関する主なご意見

- **経済合理的に考えると上に凸の形になり、過去を見ても同様の経路であったことも理解しながら、今後の2035年度や2040年度の目標を考える必要がある。**
- **農業分野でも、最初はスロースタートでだんだんと**指数関数的に伸びていく形（削減経路）を取らざるをえない状況**。雇用を維持しながら国内の自給率を高める意味では、他の産業でも、農業と共通する部分がある。**
- **このままエネルギー多消費産業の衰退が進めば、経済と環境の好循環は達成されず、雇用も失われる。1.5℃目標への整合は目指しつつ、**ある程度柔軟性を持った排出削減目標を考える必要がある。****
- **イノベーションによる排出削減効果が現れるまでに時間がかかることを踏まえ、**上に凸で将来急速に下がる合理的なパスが、2050年ネットゼロに向けて直線的な削減を目指すべきか、G7の一員としての日本の国際的な発信の在り方も考えながら検討**を深めるべき。**
- **将来的にネットゼロにするだけでなく、**早期の排出削減の考え方**の下、**カーボンバジェット**の考え方を忘れずに、**海外への貢献も含めて検討**する必要がある。**
- **グローバルストックテイクで合意された、**2019年比2035年60%削減に沿って、次期NDCを考えていく必要**。野心的な数値目標は、企業にとってイノベーションのきっかけにもつながる。**
- **2050年ネットゼロ、1.5度目標と整合的な道筋**を示し続けるということが、企業・社会にとって**予見可能性を高める**ことにつながる。
- **国際的な1.5℃目標や日本の2050年ネットゼロ目標に整合した意欲的な目標を掲げるべきであり、それを**ダウングレード**するようなシグナルを社会に発するべきではないが、**現実的な政策に知恵を出すことが必要**。**
- **最終的に目指すべきゴールについて、**専門性を持った各セクターが共通認識を持って取り組むことが重要**。その最終ゴールから**バックキャスト**して**高い目標を掲げることが重要**。**

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- **2050?CO2????????????????????????????????**
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????2035?60????????????????????????????????2025????10??
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Posted in ??????????, ??? | No Comments »

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?? ?? · Wednesday, December 4th, 2024



Lari Bat/iStock

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

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?? ?? · Tuesday, December 3rd, 2024



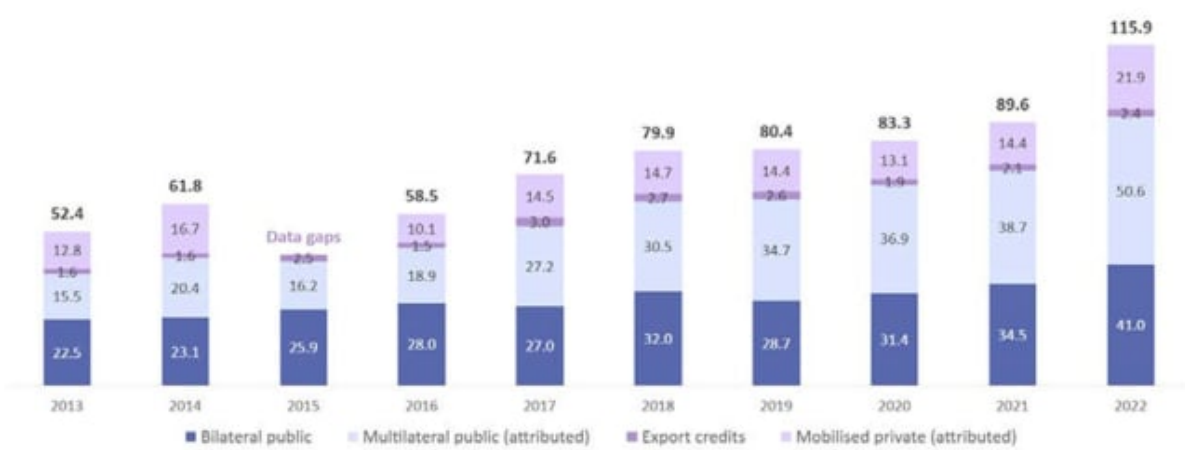
malerapaso/iStock

11?24??COP29?????2035????????????????????????????????3000????????????????????????????48????

??CO2??

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Figure 1. Climate finance provided and mobilised in 2013-2022 (USD billion)



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Climate Finance Provided and Mobilised by Developed Countries in 2013-2022

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

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?? ?? · Sunday, December 1st, 2024

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<https://agora-web.jp/archives/240629162834.html>

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

COP29????????????????????????????????

?? ?? · Saturday, November 30th, 2024



COP29????????????

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COP29??????
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2????1????2026?1?20????

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

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?? ?? · Tuesday, November 26th, 2024



InnaFelker/iStock

11??12??13????????????????????CLINTEL????????????????????”Climate change, facts and myths in the light of science”????????????????????

Two day Clintel conference in the Parliament of Prague – Clintel

??CO2??

??CLINTEL??World Climate Declaration????????????????????1961??

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12. ???2050????????????
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14. ?????????????????????????????????????378,000????????????????25????
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Posted in ??????????, ??, ????? | No Comments »

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?? ?? · Thursday, November 21st, 2024

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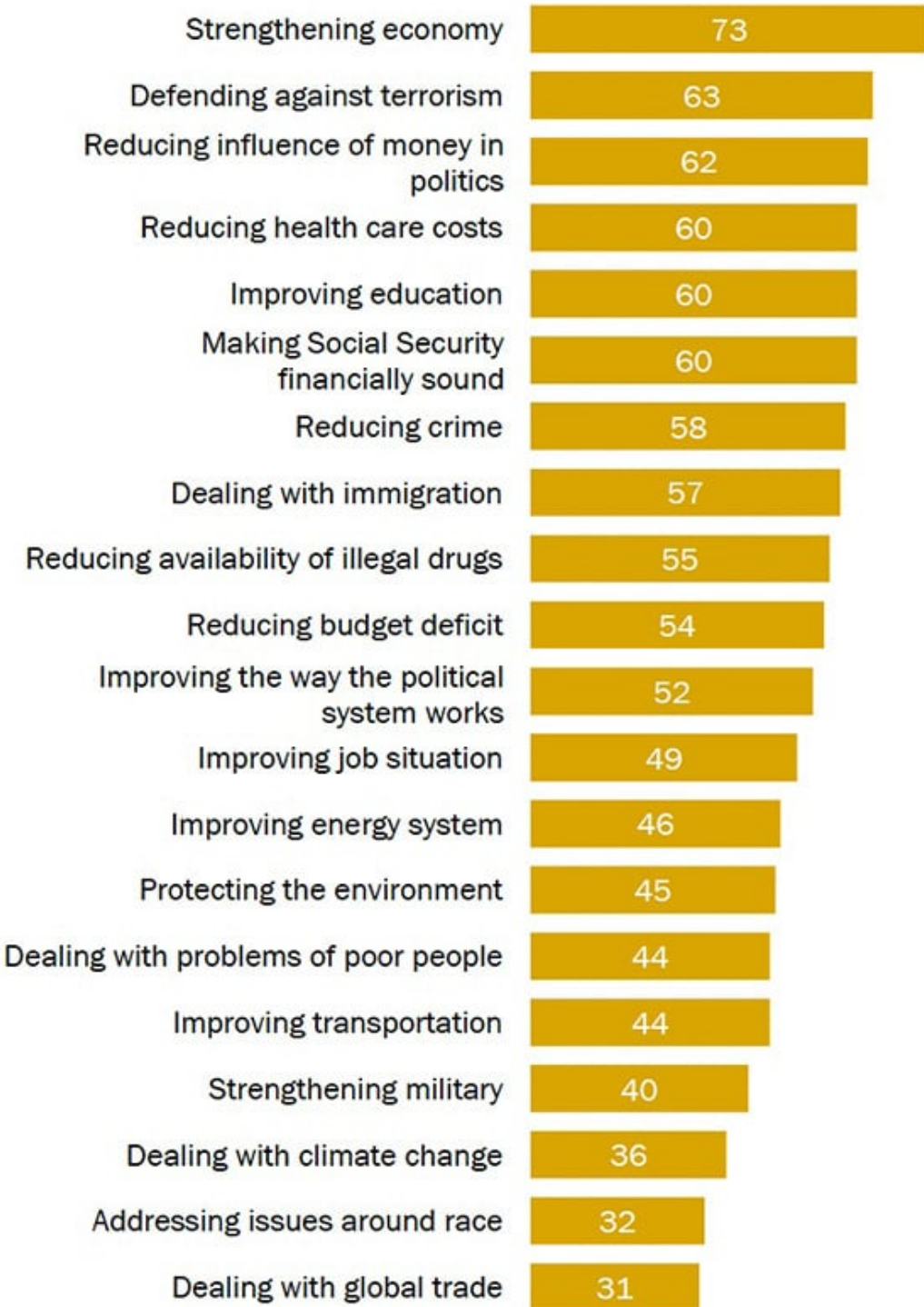
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Americans' top policy priority this year? Strengthening the economy

% who say ___ should be a top priority for the president and Congress to address this year



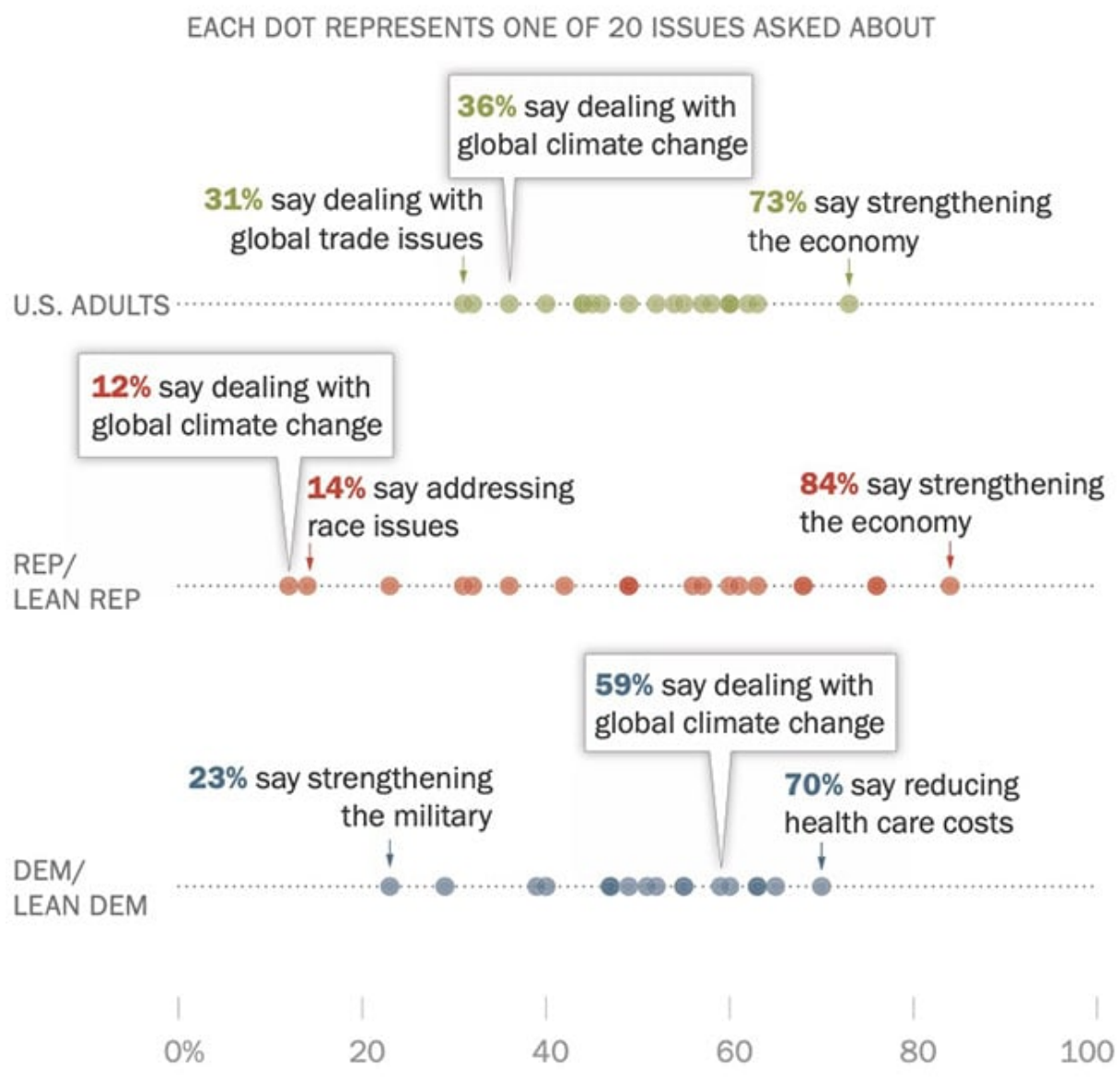
Source: Survey of U.S. adults conducted Jan. 16-21, 2024.

PEW RESEARCH CENTER

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Republicans rank climate change at the bottom of their priorities for the president and Congress in 2024

% of U.S. adults who describe each of the 20 issues asked about as a top priority for the president and Congress



Note: Respondents who gave other responses or did not give an answer are not shown.
Source: Survey of U.S. adults conducted Jan. 16-21, 2024.

PEW RESEARCH CENTER

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I-1. J-クレジット制度の概要と目的

- J-クレジット制度とは、省エネ・再エネ設備の導入により排出削減されたり、森林管理により吸収されたりしたCO₂等の温室効果ガスの量を認証し、認証分の「クレジット」を発行する国の制度。
- クレジットは、排出削減実績を主張する権利を「証券化」したようなものであり、自らも排出削減に努めているが、もっと（実態以上に）排出削減した“ことにしたい”者へ、**移転・売却することが可能**。
- こうした売買が、クレジットの創出者と購入者との間の自由取引（量も価格も自由）で行われることにより、「市場メカニズム」の下、地球温暖化対策の資金を循環させ社会全体で最適に配置させることが目的（認証それ自体、あるいは認証を通じた排出削減・吸収の“称揚”が最終目的ではない）。



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GEPR??? · Thursday, November 14th, 2024

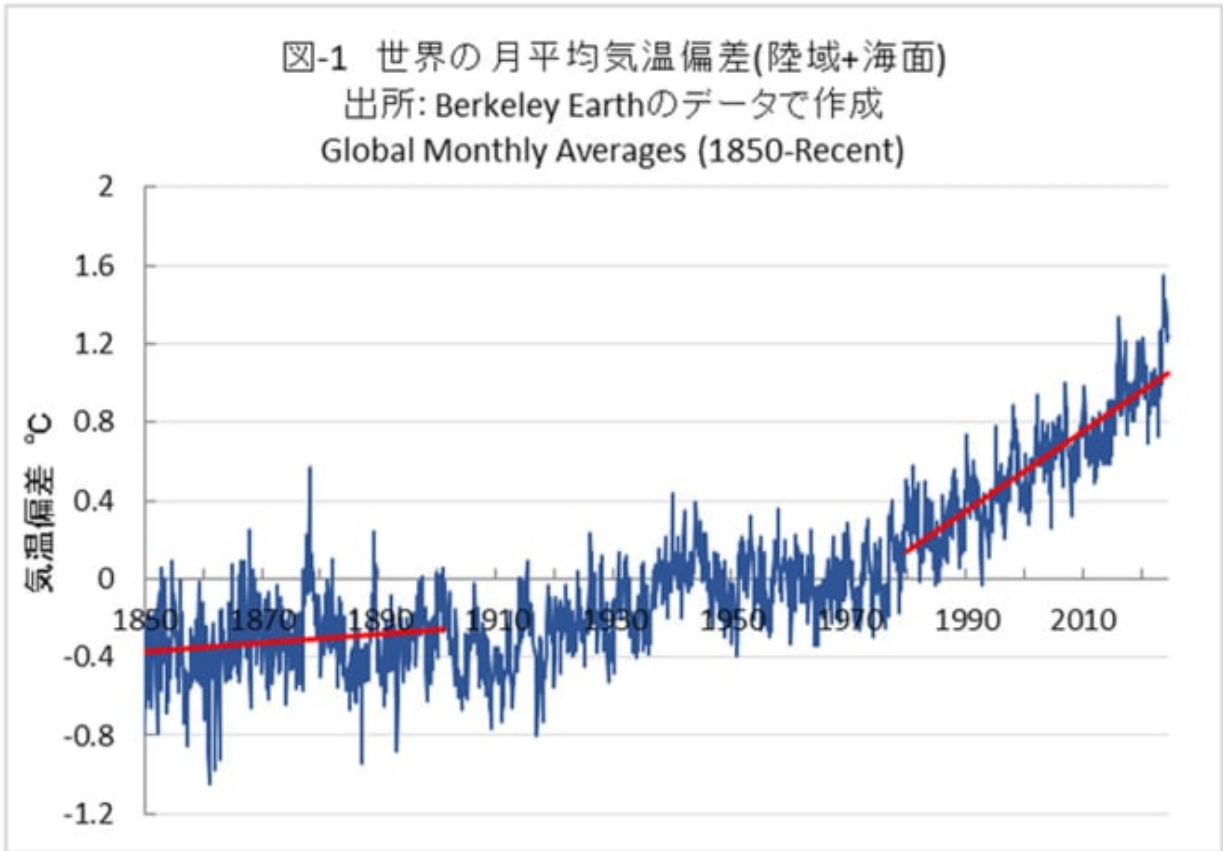


ImagineGolf/iStock

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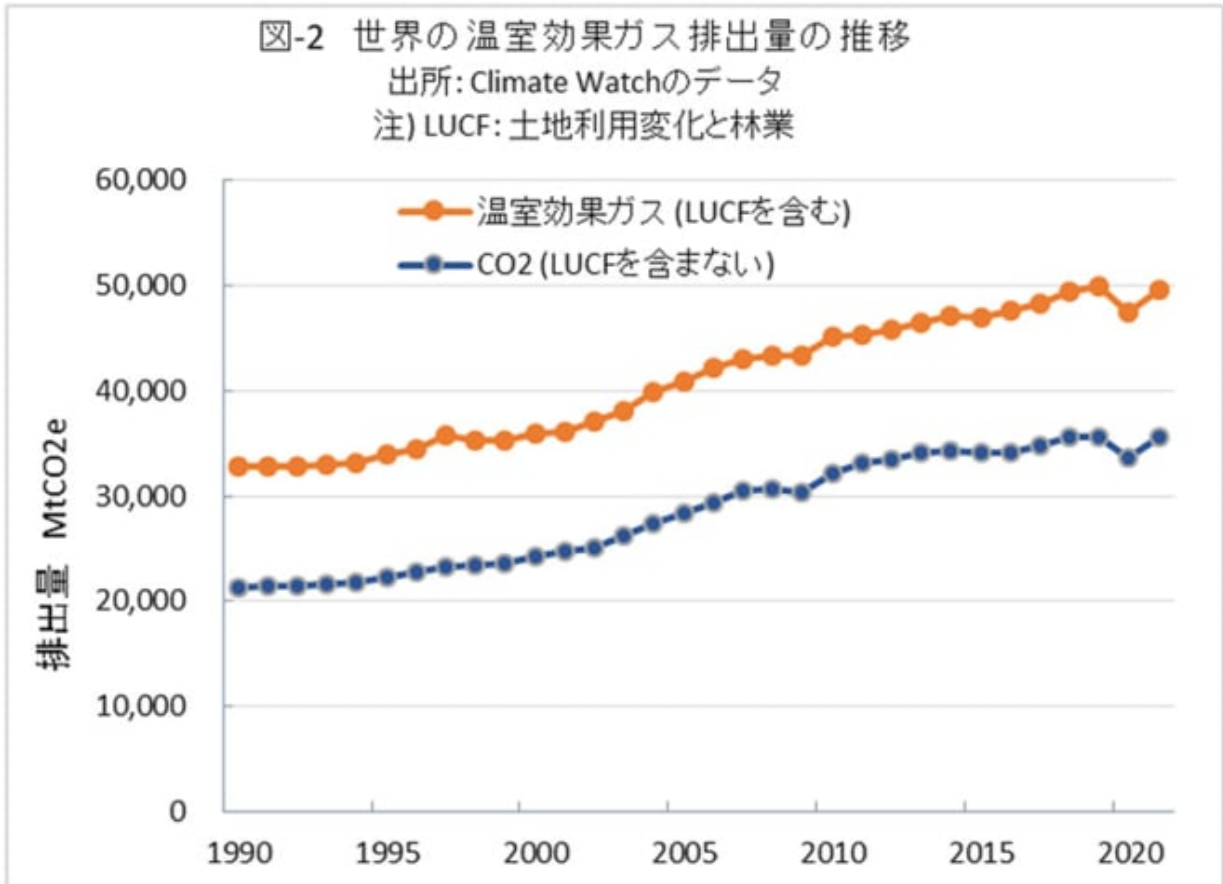


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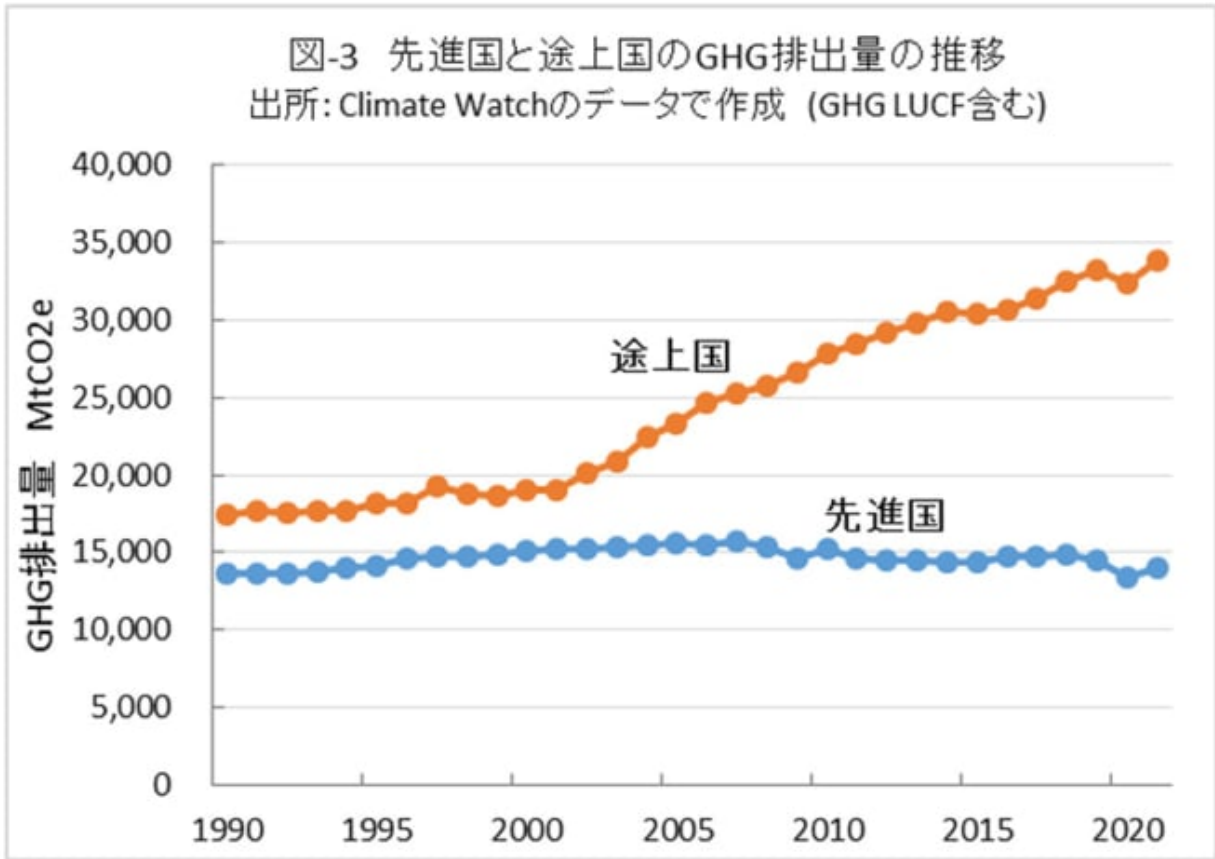
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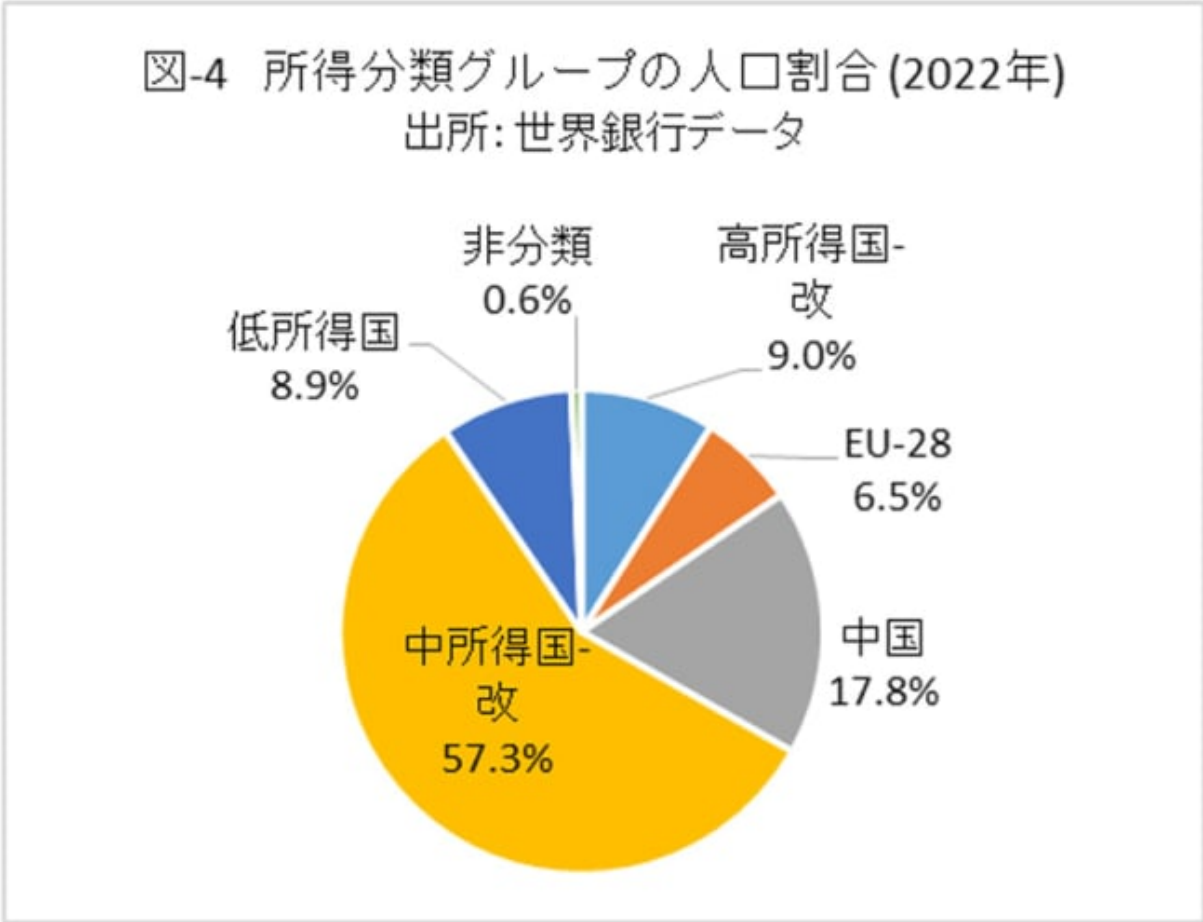
表-1 世界銀行の所得水準による国分類と本報告の国分類

本報告の分類	世界銀行、所得水準による国別分類 (FY22)		本報告での分類名称	備考
	分類名称	1人当たりGNI, USD		
先進国	High income countries	> 12,695	高所得国-改	EU除く
			EU-28	英国含む27カ国 ブルガリア含む
途上国	Upper-middle income countries	4,096 - 12,695	中国	中国、ブルガリア除く
			中所得国-改	
	Lower-middle income countries	1,046 - 4,095		
	Low income countries	< 1,045	低所得国	

71

GHG????????????????????????????EU-28??EU-28????????????????
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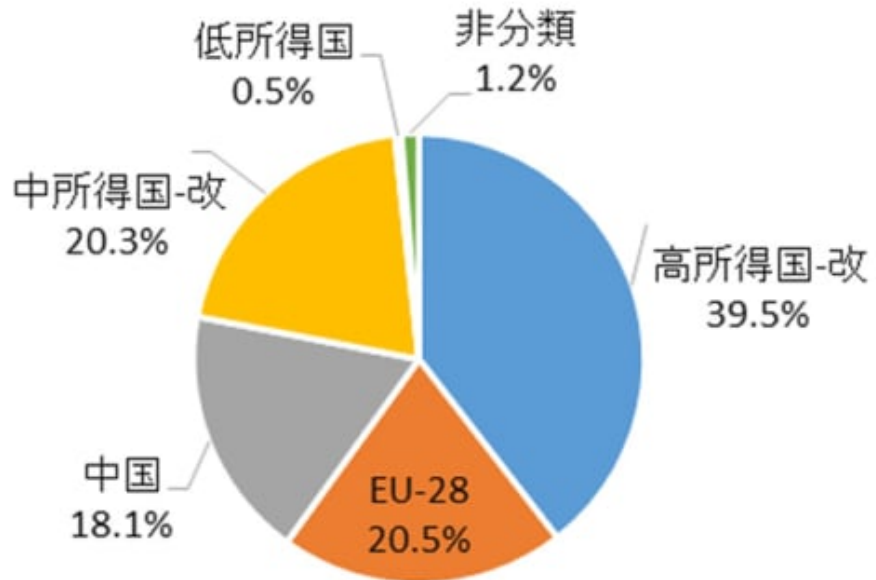
200 GHG GDP 5



4

GHG 2022 3/4 GDP 40%

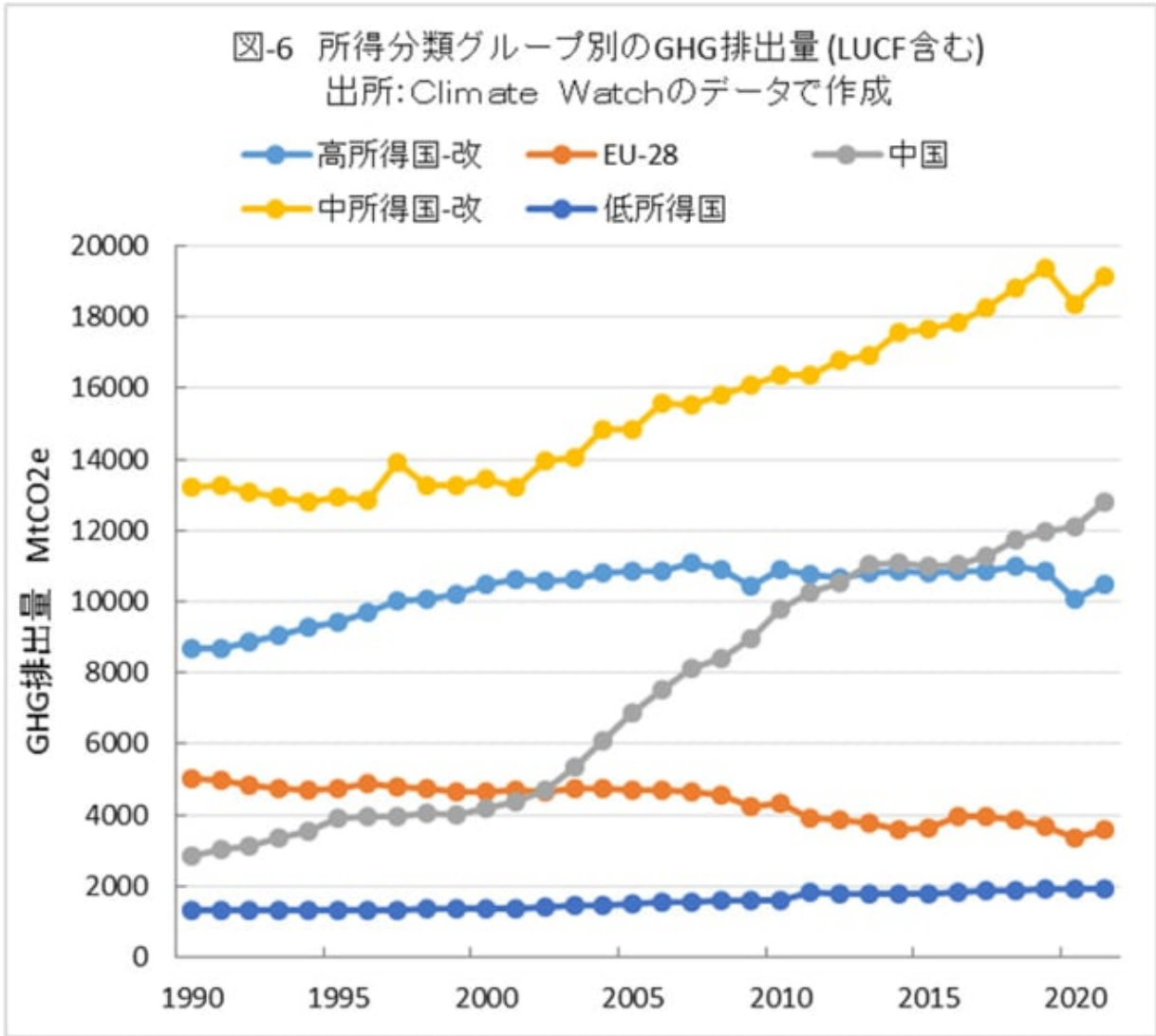
図-5 所得分類グループの実質GDP割合 (2022年)
出所: 世界銀行データ (constant 2015 USD)



25

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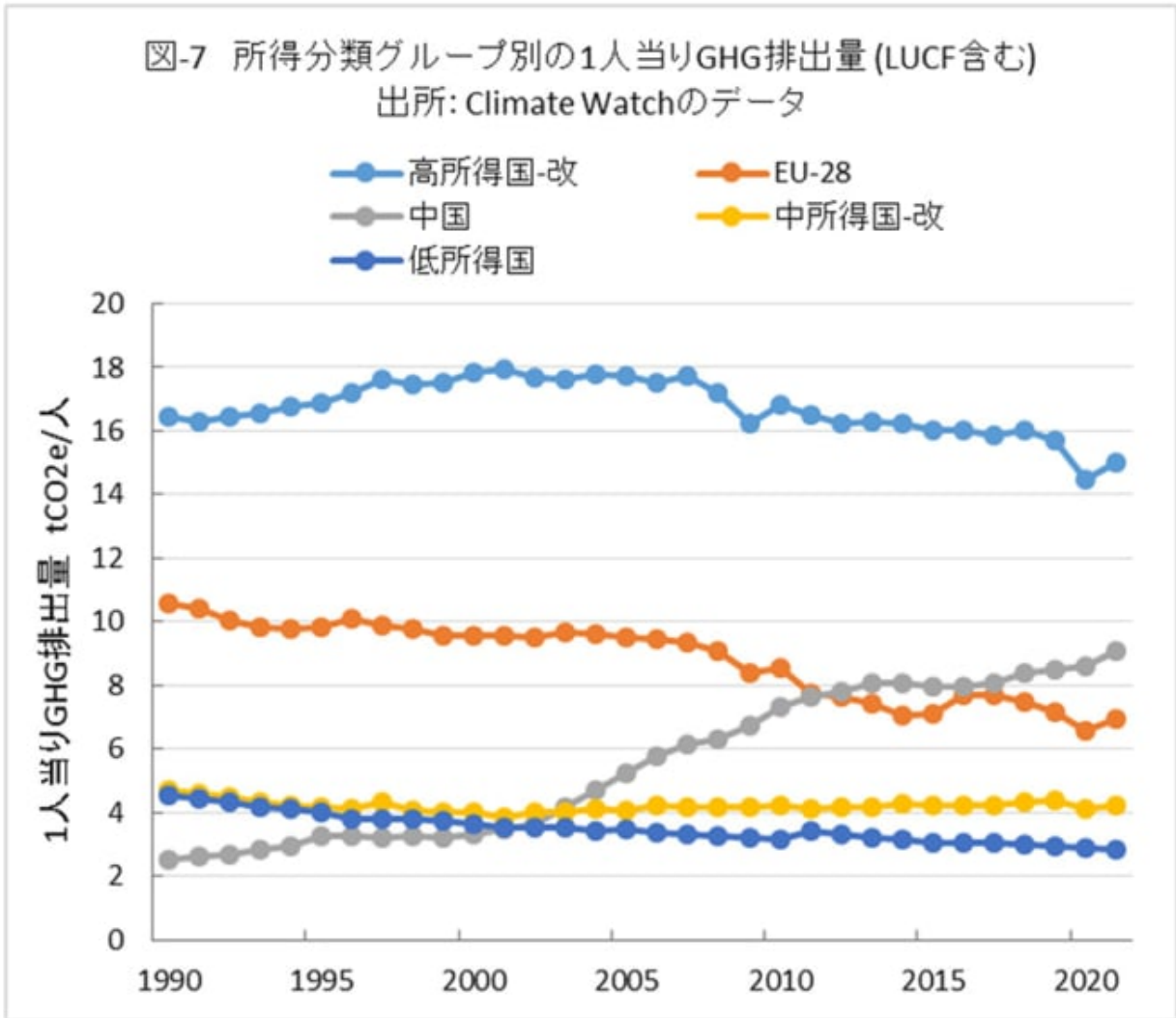
EU-28?GHG????????????????????-????????????????????-
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26

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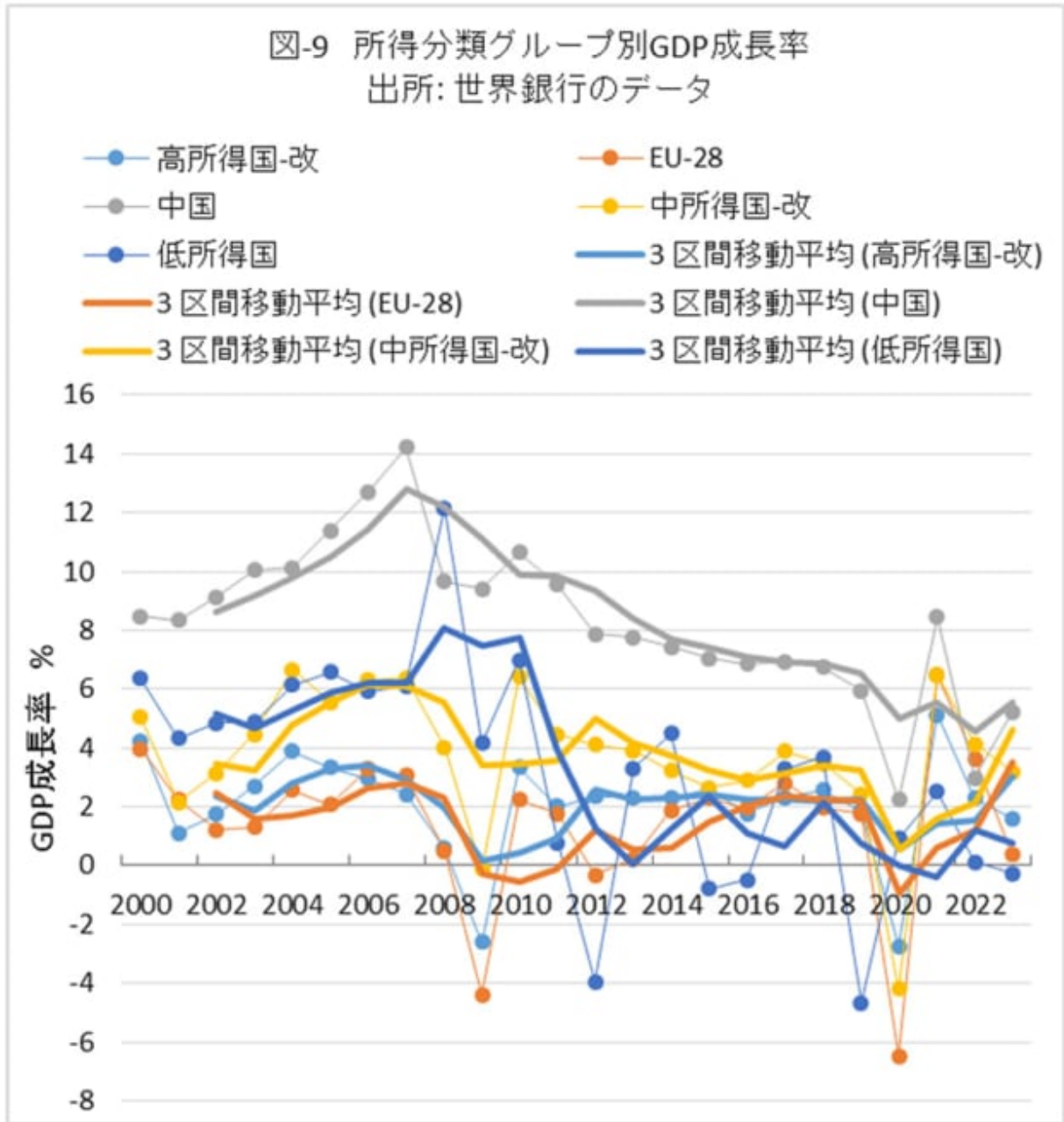
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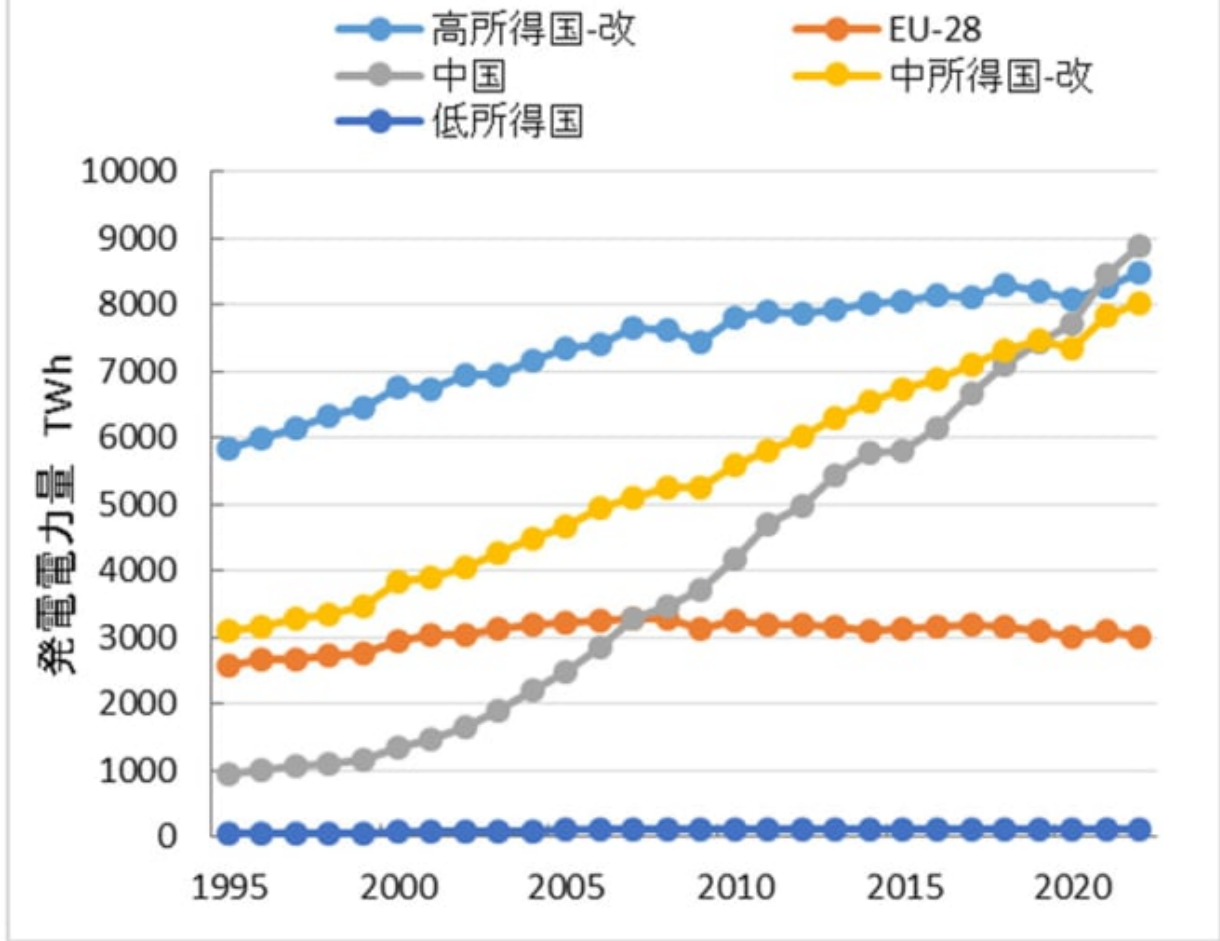
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Administration??International??

図-11 所得分類グループ別の年間発電電力量
出所: 米国エネルギー情報局(EIA)のデータ



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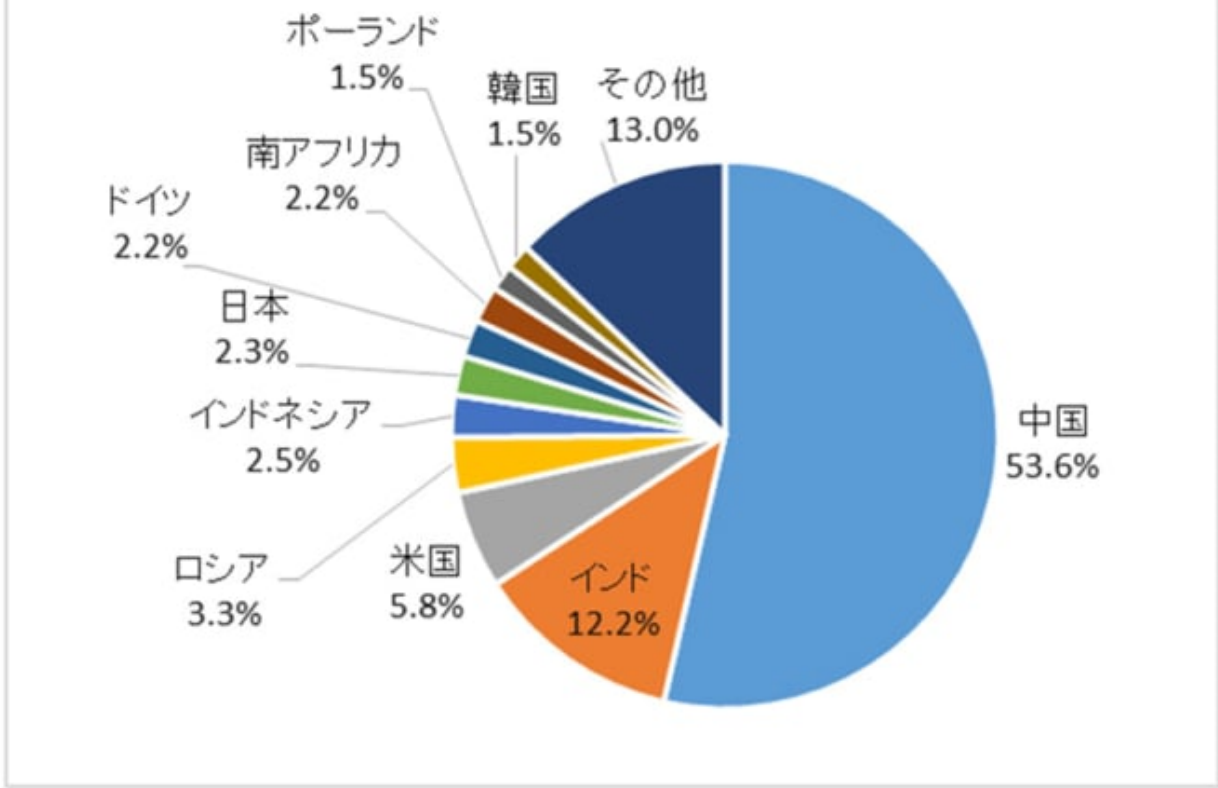
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図-13 世界の石炭消費量上位国(2022年)
消費重量比率、冶金原料炭を含む
出所: 米国エネルギー情報局、Internationalデータ



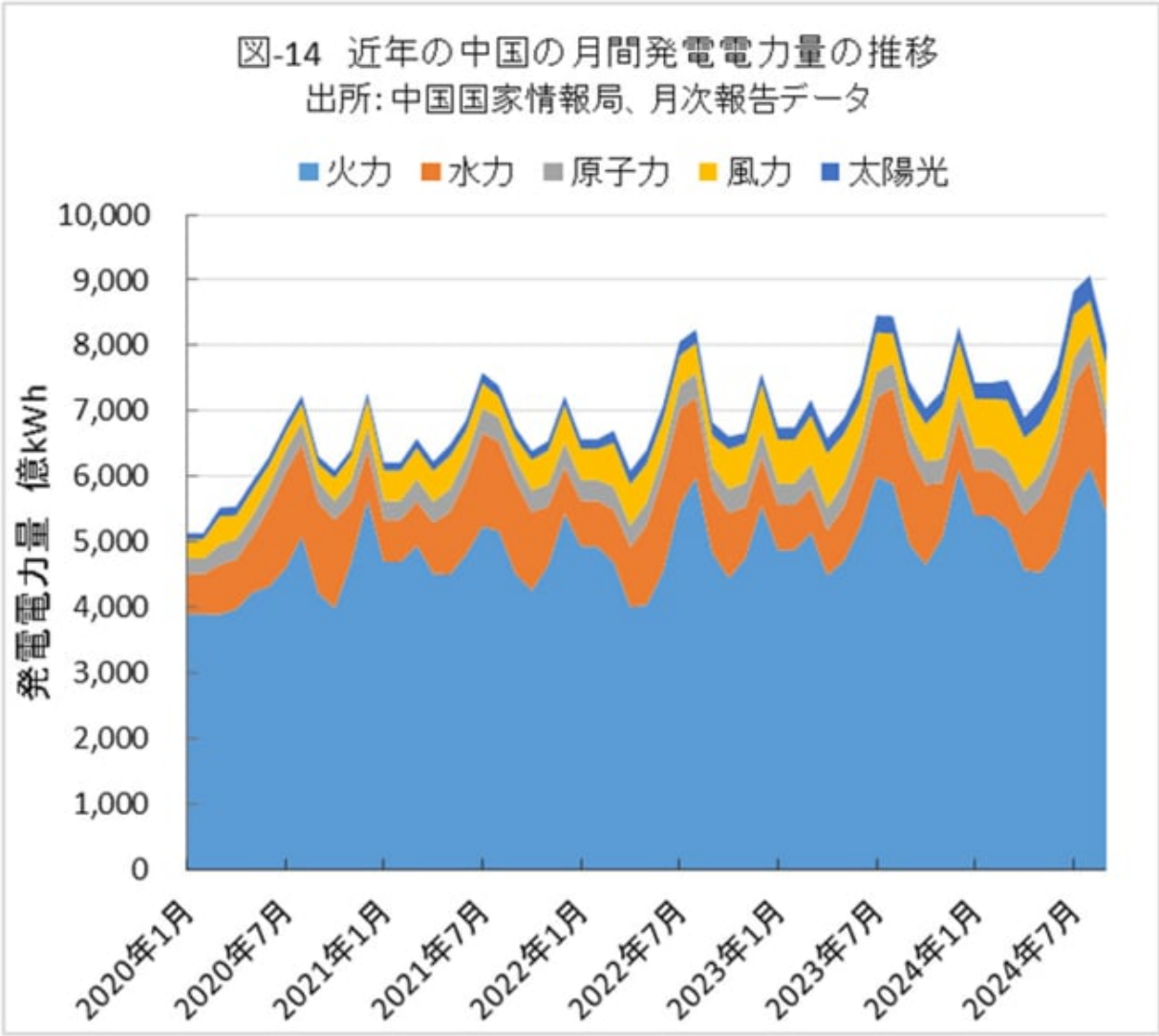
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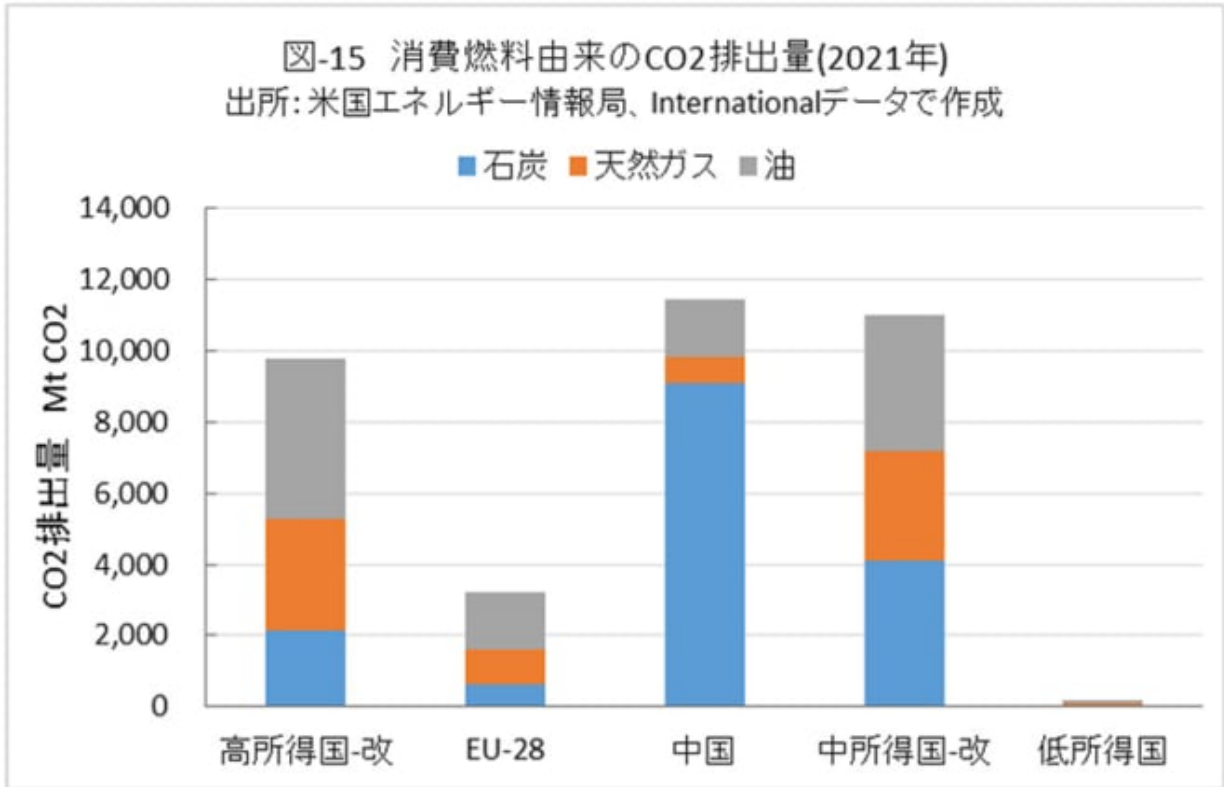
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Just_Super/iStock

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- [https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)
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2024 [https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)

How ‘carbon cowboys’ are cashing in on protected Amazon forest

[https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)
[https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)
 Netflix [https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)
 Airbnb [https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)
 Spotify [https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)

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Betrug im Handel mit Kohlenstoff-Zertifikaten? – Forschung enthüllt massive Lücken im Waldschutz

[https://www.reuters.com/technology/amazon-forest-protection-2024-12-19/](#)
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Report: U.N. Using Climate ‘Credit’ Scheme to Hide Massive Carbon Emissions

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GEPR?? · Tuesday, November 12th, 2024



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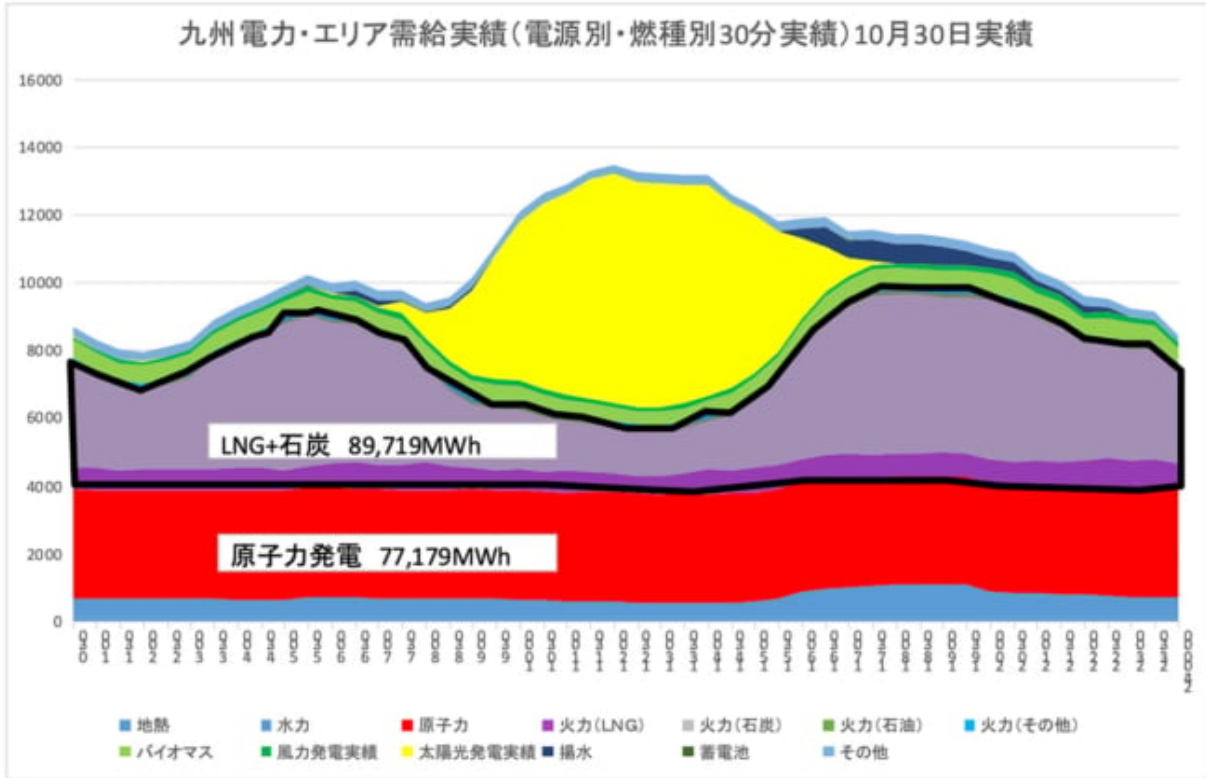
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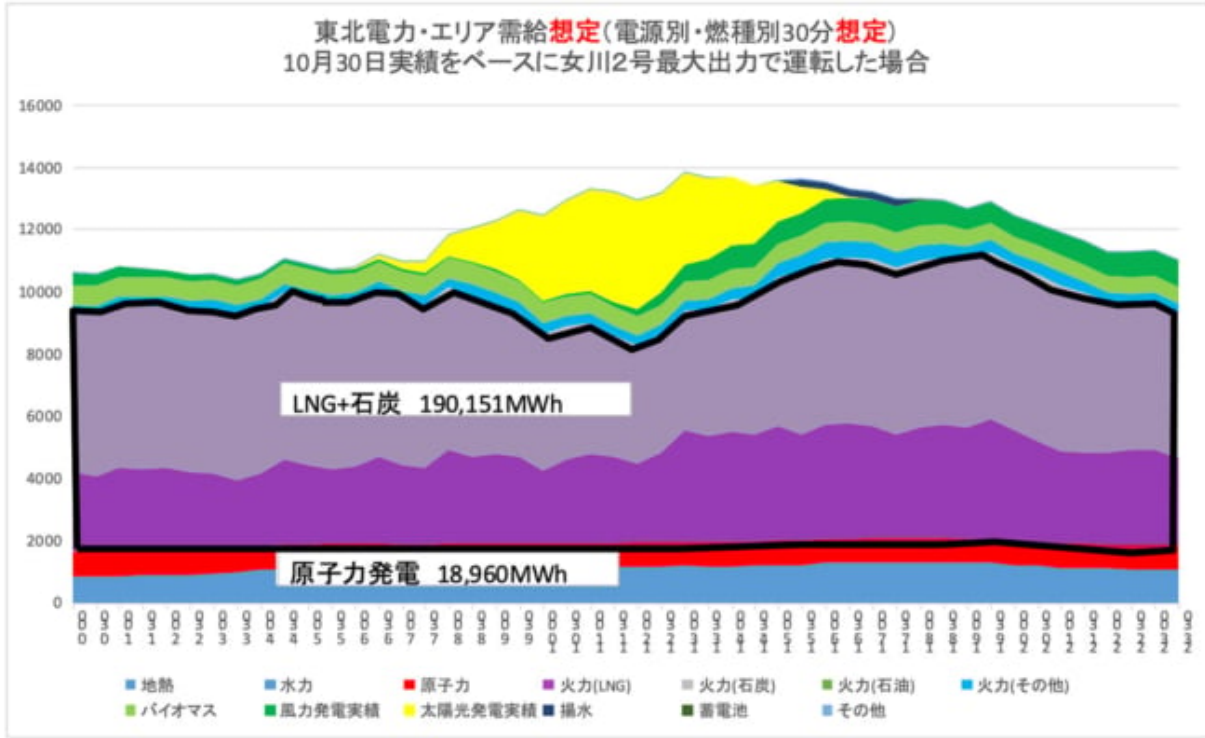
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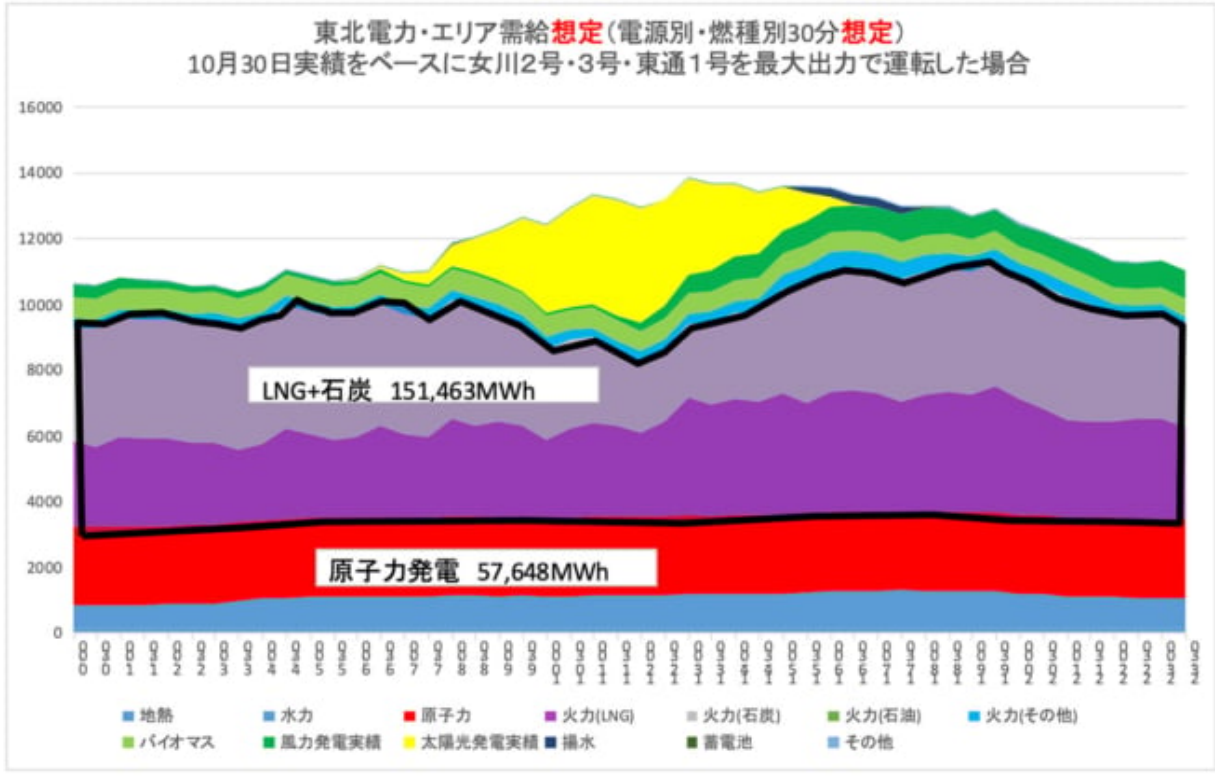
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- GHGs
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?? ? · Wednesday, November 6th, 2024



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Posted in ???, ????? | No Comments »

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?? ?? · Thursday, October 31st, 2024



ChrisSteer/iStock

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ESG?SDGs?2021??
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?? ?? · Friday, October 25th, 2024



ESG評価の欺瞞

4/19

同業のA社とB社。どちらがESG投資対象となるでしょうか？

A社

- ・年間CO₂排出量：10万トン
- ・従業員数：1万人
- 一人当たり年間CO₂排出量：10トン

B社

- ・年間CO₂排出量：100万トン
- ・従業員数：20万人
- 一人当たり年間CO₂排出量：5トン

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

ESG評価の欺瞞

5/19

同業のA社とB社。どちらがESG投資対象となるでしょうか？

年度	CO ₂ 排出量	売上高
2018年度	8万トン	10億円
2019年度	9万トン	9億円
2020年度	10万トン	8億円

CO₂の絶対量は少ないが、環境効率が悪化

年度	CO ₂ 排出量	売上高
2018年度	120万トン	80億円
2019年度	110万トン	90億円
2020年度	100万トン	100億円

CO₂の絶対量は多いが、環境効率が向上

私がESG投資家の立場であれば評価は不可能。さらに、ここでは同じ業種としたが、別の業種(製造業と小売業、サービス業など)の場合や、立地地域/国によって電力のCO₂排出係数が異なる場合など、現実の企業間比較ではますます複雑な条件が重なる。この問いに答えてくれたESGの専門家は無。

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