

# 國際智庫動態報導

2017 年 1 月 26 日



## 6 ENVIRONMENT AND DEVELOPMENT STORIES TO WATCH IN 2017

美國世界資源研究所(WRI)發表「展望 2017 年：六大環境與發展故事」



WORLD  
RESOURCES  
INSTITUTE

Last year brought major political shocks to the world: the election of Donald Trump; the rise of “fake news;” and the emergence of populist, anti-globalization movements in Britain, the Philippines and elsewhere. Many of these were fueled by the growing feeling among certain groups that they are being left out of economic opportunities.

The big question for 2017 is: Are these

disruptions merely a speed bump for progress toward a more sustainable, equitable world, or will they signal a much larger retreat?

WRI President and CEO Andrew Steer addressed this question today in Washington at the Institute’s annual Stories to Watch presentation, highlighting six major topics to scrutinize over the course of this year. How they unfold will help determine whether we continue to curb emissions, expand the economy and foster sustainable development – or not.

Story #1: How Far Will Trump Go?

In advance of his inauguration as U.S. president

### 本期摘要(KEY INFORMATION)

◎美國世界資源研究所(WRI)總裁兼首席執行官安德魯·斯蒂爾 (Andrew Steer) 為「展望 2017 年」述說六大環境與發展故事，這六個故事分別為：

1. 川普會走多遠？
2. 化石燃料復興 vs. 再生能源洶湧
3. 國際氣候行動的氣勢是否持續？
4. 明天的市場
5. 植物性食品的提升
6. 汽車創新將有助於人類與地球嗎？

◎日本能源經濟研究所(IEEJ)發表「2017 年國內外能源情勢展望」特別快報，針對國際石油情勢、國際天然氣及液化天然氣市場、日本國內電力市場改革、日本國內外再生能源市場、氣候變遷問題、日本國內外核能產業及日本能源市場等七大領域走向提出評析。

on January 20, President-elect Trump has named several climate skeptics to his cabinet. It will be important to watch how these new leaders and their policy decisions affect environmental protections, such as ozone and methane emissions standards, renewable energy fuel and energy efficiency standards and the clean water rule.

The role of the United States as a climate leader is also at stake, with an uncertain future for the Clean Power Plan, U.S. commitment to the Paris Agreement on climate change, and the country's ability to meet its national target to reduce emissions 26-28 percent by 2025.

"There's nothing particularly partisan about protecting God's creation — traditionally it's been the Republicans who have often led," Steer said. "So let's not assume before we see real evidence, but there's no question the statements (by Trump) suggest there will be a gutting of some of the environmental protections in this country."

It will be interesting to watch how leaders at the local levels respond. Already, 15 states and 51 cities have called for climate action. In the face of threats at the federal level, will these leaders, those in Congress and citizens step up their game?

#### Story #2: Fossil Fuel Renaissance vs. Renewable Energy Surge

Although Trump has promised to bring back coal, he is unlikely to be able to do so given current economic conditions.

The U.S. coal industry has slumped since 2008, and clean energy is now one of the fastest-growing U.S. job sectors. Wind and solar power

are now nearly cost-competitive with coal and natural gas in many areas. "Coal declining in the United States has almost nothing to do with climate legislation at all," Steer said. "It has to do with pure economics."

And globally, while one-third of planned power capacity is still in coal, renewable energy investment was double that of coal and gas last year. Will this growth continue? Follow-through on renewable energy commitments from big players like India and China will be strong indications, as well as financial outcomes from July's G20 Summit.

#### Story #3: Will International Momentum on Climate Action Continue?

Last year was a landmark moment for international climate action when 196 countries adopted the Paris Agreement. The only three that haven't signed are Syria, Uzbekistan and Nicaragua.

Many countries are already translating their Paris commitments into action on the ground. For example, 38 nations and eight institutions have joined the NDC Partnership, which aims to accelerate action and raise ambition on implementation of national climate goals.

It will be important to watch whether more progress is made in the coming year. Some important moments include: Will India hit its ambitious solar targets? Will China successfully roll out a national carbon market? And, will the new UN Secretary-General Antonio Guterres make climate change as high a priority as his predecessor Ban Ki-moon did?

#### Story #4: Tomorrow's Markets

Many businesses aren't just moving toward sustainability; they're leading on it. More than 200 companies have committed to set emissions-reduction targets based on what the science says is necessary to prevent the worst effects of climate change, nearly 600 are working toward deforestation-free supply chains, and 84 have committed to source 100 percent renewable energy.

At the same time, investors are increasingly managing funds using environmental, social and governance factors (ESG), and mounting evidence shows that incorporating these screens can have a neutral or even positive effect on returns. "In the old days, the picture image was governments set regulations and the private sector says 'OK, we'll fulfill them,'" Steer said. "Today the private sector is really driving the agenda."

The question is whether that momentum will continue in 2017, and will the shift to sustainable investing translate into pressure in C-suites and board rooms?

Benchmarks to watch include whether more companies set science-based targets, and if these targets expand to other sectors like land and water use. It will be also interesting to see how businesses and investors respond to the forthcoming Business Commission on Sustainable Development report, due out during next week's World Economic Forum in Davos.

#### Story #5: The Ascent of Plant-Based Foods

The consumption of meat and especially beef has one of the biggest impacts on the environment of any sector. Cattle are the single-largest drivers of deforestation and, if all the

cattle in the world were their own country, it would be the third-largest emitter. The challenge is to curb this impact while producing the 70 percent more food needed to feed a growing population by 2050.

Fortunately, we are seeing increasing interest in plant-based protein, especially in the United States. One-quarter of Americans already report eating less red meat, while one in 10 millennials are vegetarian or vegan. Tyson launched a venture capital fund worth \$150 million to explore meat alternatives. As part of the Farm Animal Investment Risk & Return initiative, 42 institutional investors representing \$1.25 trillion in assets pressured food companies to futureproof their supply chains by diversifying their protein sources. And Beyond Meat products, including plant-based proteins that taste like burgers, chicken and meatballs, are now sold in 11,000 stores.

The question is whether beef producers will begin to diversify and put in place strategies to reduce their impact? And will consumer demand for plant-based proteins and other sustainable alternatives grow?

#### Story #6: Will Innovation in Automobiles Help People and the Planet?

Forget the horseless carriage. The new auto trend is driverless cars. More than 30 major companies are currently experimenting with automated vehicles. Meanwhile, ride-sharing services like Uber and China's Didi are worth tens of billions of dollars, and there are more than one million electric vehicles on the roads globally.

The question is whether these three trends — automation, ride-sharing and electrification — will be integrated to reduce cars' impact on the environment, or whether they'll operate in silos and increase the number of vehicles on the road? As WRI Board member and Zipcar co-founder Robin Chase said, "Simply eliminating drivers from cars, and keeping everything else about our system the same, would be a disaster." After all, under the current car-centric model, workers lose about eight days a year in productivity sitting in traffic, and transportation is responsible for 14 percent of global emissions. It's also important that these new innovations complement rather than compete with people-

and planet-friendly mobility options like mass transit and biking.

#### An Exciting Year Ahead

It may not be easy to watch how these stories play out over the next year, but 2017 certainly won't be boring.

"Like it or not, real change will happen [this year]," Steer said. "Some changes look like they may not be very good. It's our job to get a virtuous cycle going, and get really positive change."

原始連結：<http://www.wri.org/blog/2017/01/6-environment-and-development-stories-watch-2017>

## 2017 年內外エネルギー情勢の展望

日本能源經濟研究所(IEEJ)發表「2017 年國內外能源情勢展望」特別快報



日本能源經濟研究所(IEEJ)於 2017 年 1 月 5 日發表「2017 年國內外能源情勢展望」特別快報，針對國際石油情勢、國際天然氣及液化天然氣市場、日本國內電力市場改革、日本國內外再生能源市場、氣候變遷問題、日本國內外核能產業及日本能源市場等七大領域未來走向提出評析，相關內容摘要如下：

### 一、國際石油情勢

預測 2017 年將進行緩慢的重新平衡，全世界的石油需求將較前一年增加 120 萬桶/日左右，但受到低油價的影響，非 OPEC 供給者整體將呈現停滯，尤其下半年供給過剩的情形將逐漸消解。原油價格將緩緩上升，預測 WTI 石油基準價格上半年為 54 美元，下半年為 59 美元。然而產油國家遵循減產政策、川普新政府的美國頁岩油生產狀況、歐美主要國家的政治經濟狀況均會對原油市場造成重大的影響，基本上市場價格將持續高度波動。

### 二、國際天然氣及液化天然氣市場

預測供給過剩的狀況在 2017 年仍會持續出現，2018 年後亦會持續一段時間。然而亞洲的液化天然氣價格大致與原油價格連動，隨著原油價格緩慢上漲，亞洲的液化天然氣價格整

體將呈現上揚趨勢。另一方面，依供需關係而定的液化天然氣現貨價格呈現下跌的趨勢。與原油價格連動的液化天然氣價格、液化天然氣現貨價格兩者偏離，或許可望為亞洲液化天然氣價格議論的契機。

### 三、日本國內電力市場改革

為貫徹電力制度改革所組成的政策小委員會持續進行制度檢討，未來電力交易市場活化、容量市場、非化石電源市場價值市場的創設等個別制度設計將繼續併行，但制度與制度之間如何整合也是 2017 年政策討論的重要課題。另外天然氣市場將於 2017 年 4 月進行零售全面自由化。電力自由化對液化天然氣的收購、交易所造成的影響亦值得關注。

### 四、日本國內外再生能源市場：

2017 年發展再生能源的態勢將更趨穩定，預測全世界再生能源發電設備總容量於 2017 年將增加 120 至 130GW，年底將超越 2,200GW，帶動其增加的角色即是中國、印度等亞洲國家。預估再生能源的發電成本中期內將繼續下降，但日本的再生能源發電成本較世界平均高出 2 到 3 倍，居高不下，必須減少成本。日本從 4 月開始，為抑制太陽能發電急速成長伴隨的課稅增加，固定收購價格制度的運用將有所轉變。追求經濟合理性並促進再生能源的發展，是 2017 年的日本所追求目標，亦是全球的目標。

### 五、氣候變遷問題

2016 年 11 月巴黎協定生效，各國紛紛啟動因應對策。然而美國川普新政府對於氣候變

遷政策的動向待查，整體而言全球的氣候變遷政策仍未明朗。而中國針對第 13 次 5 年計畫下的氣候變遷問題採取的能源措施，以及預定自 2017 年開始實施的全國排放量交易制度的動向極為重要。

### 六、日本國內外核能產業

重啟核電的走向是最重要的焦點。有關大津地方法院對高濱電廠機組停止運轉作成的假處分，預估 2017 年 2 月左右大阪高等法院將作出保全程序抗告的審理決定，其審理結果將對今後重啟核電帶來全面性的影響。另外 2017 年運轉將屆 40 年的原子爐是否申請延役，核電業者的判斷亦受矚目。2017 年中國持續建造新的核電設施，設備容量於 2018 年 3 月將超越 43GW，領先日本成為世界第三的核能大國。中國核能產業在國際上的活躍表現，也將成為俄羅斯核能產業的關注焦點。

### 七、日本能源市場

2017 年度雖然經濟成長，但由於持續節能等因素，一次能源的供給將達連續 4 年減少，較 2010 年度減少 9%。整體而言基於一次能源減少，再生能源擴大使用、核電重啟等因素，持續轉為仰賴非化石能源。2017 年度電力、天然氣將連續 2 年增加，石油需求將達連續 5 年減少。重啟核電對於整體供需造成的影響、再生能源普及伴隨的經濟負擔等都須留意。(郭宛儀 摘譯)

原始連結：<http://eneken.ieej.or.jp/data/7119.pdf>