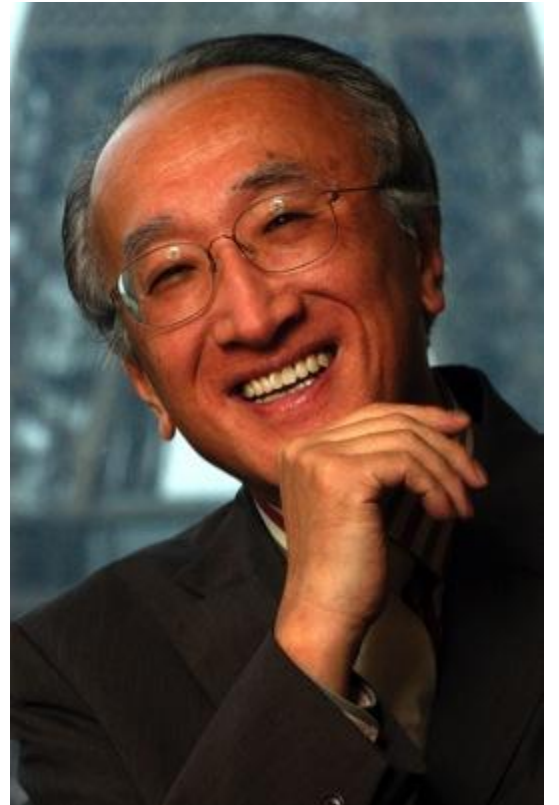


The New Energy Geopolitics: Petrostates vs Electrostates

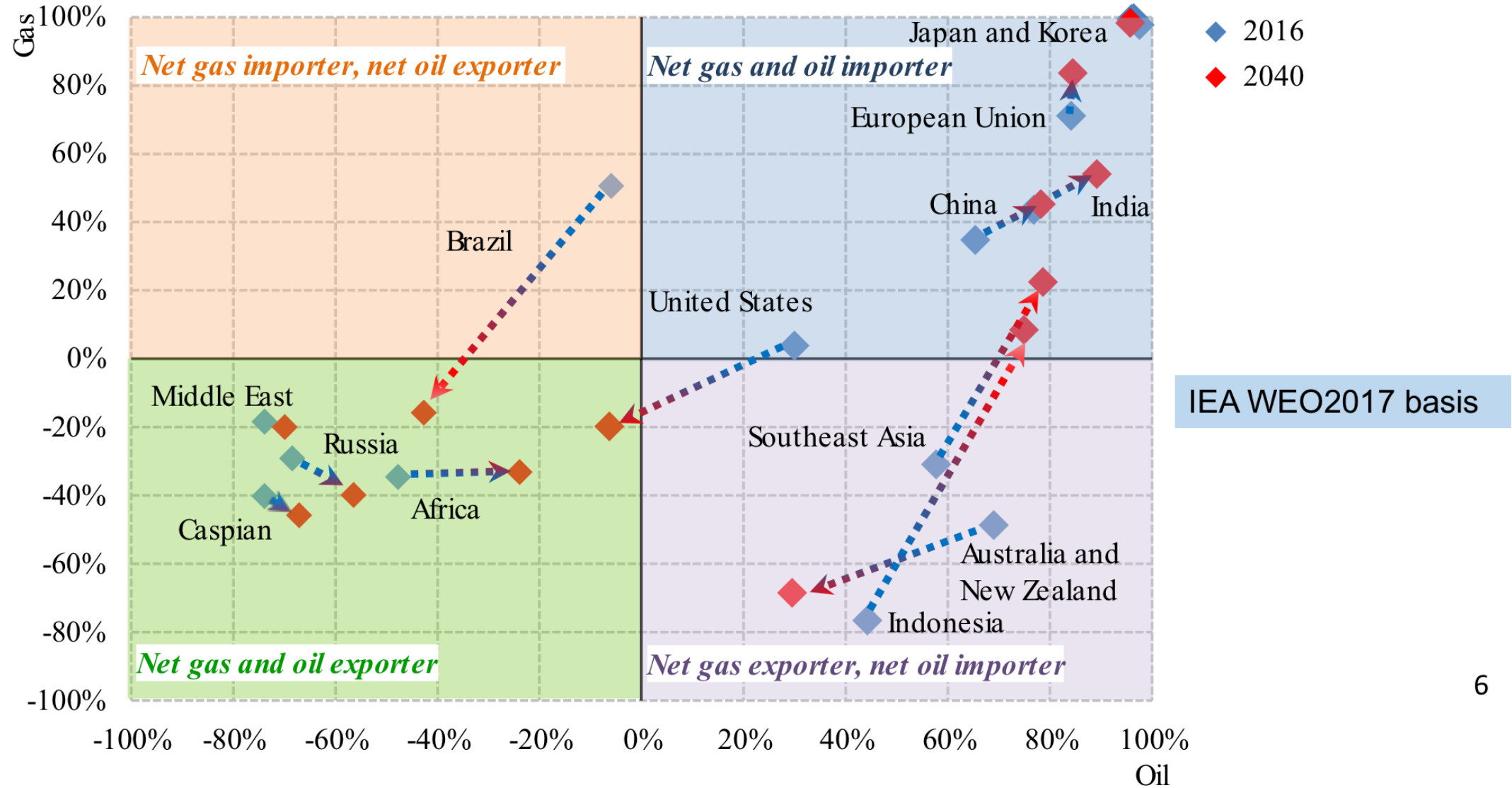
2026-10-8 ICEF2026

Nobuo TANAKA 田中伸男

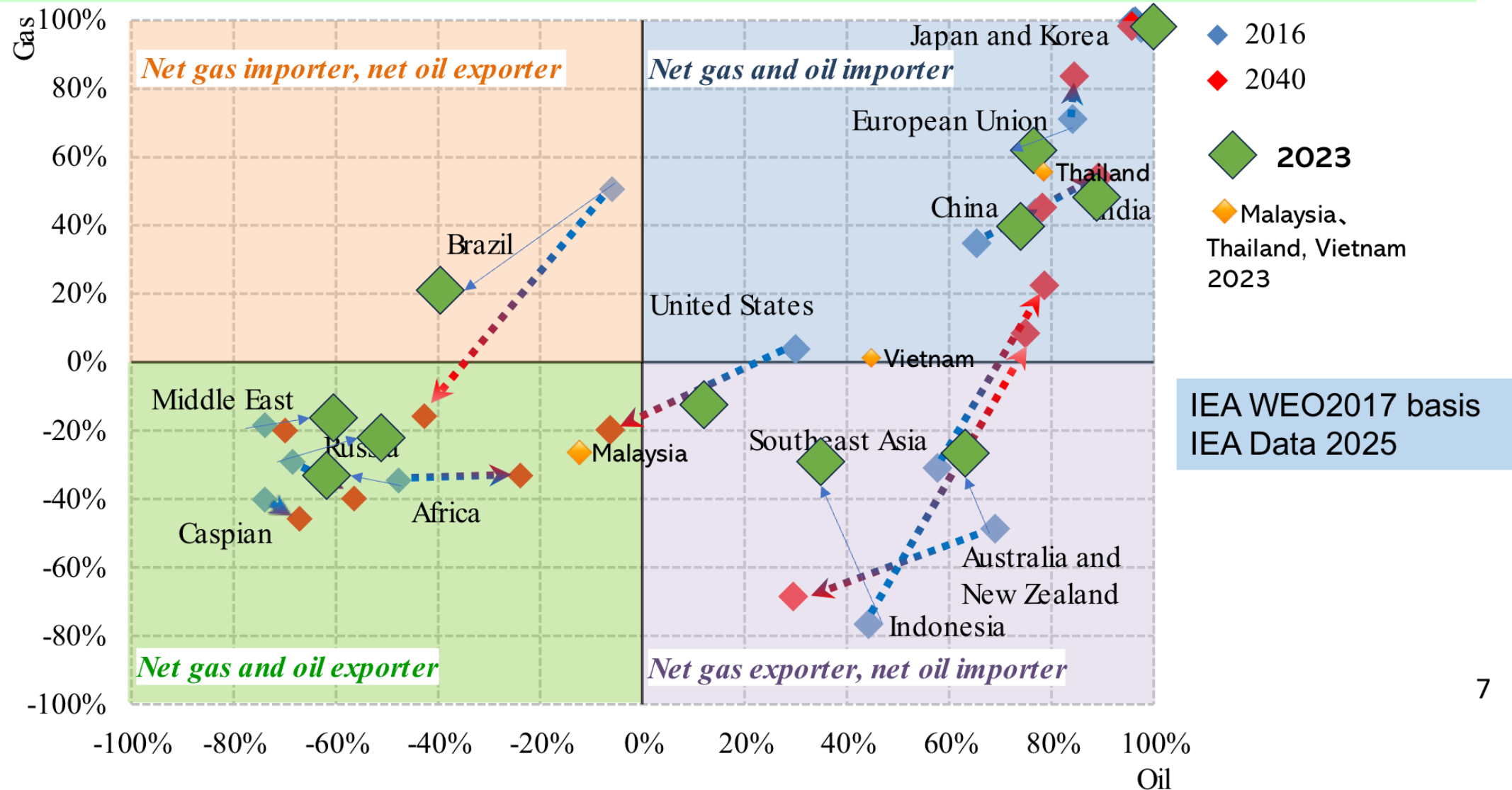
Executive Director Emeritus, International Energy Agency (IEA)
Chair, Steering committee of Innovation for Cool Earth Forum
(ICEF)



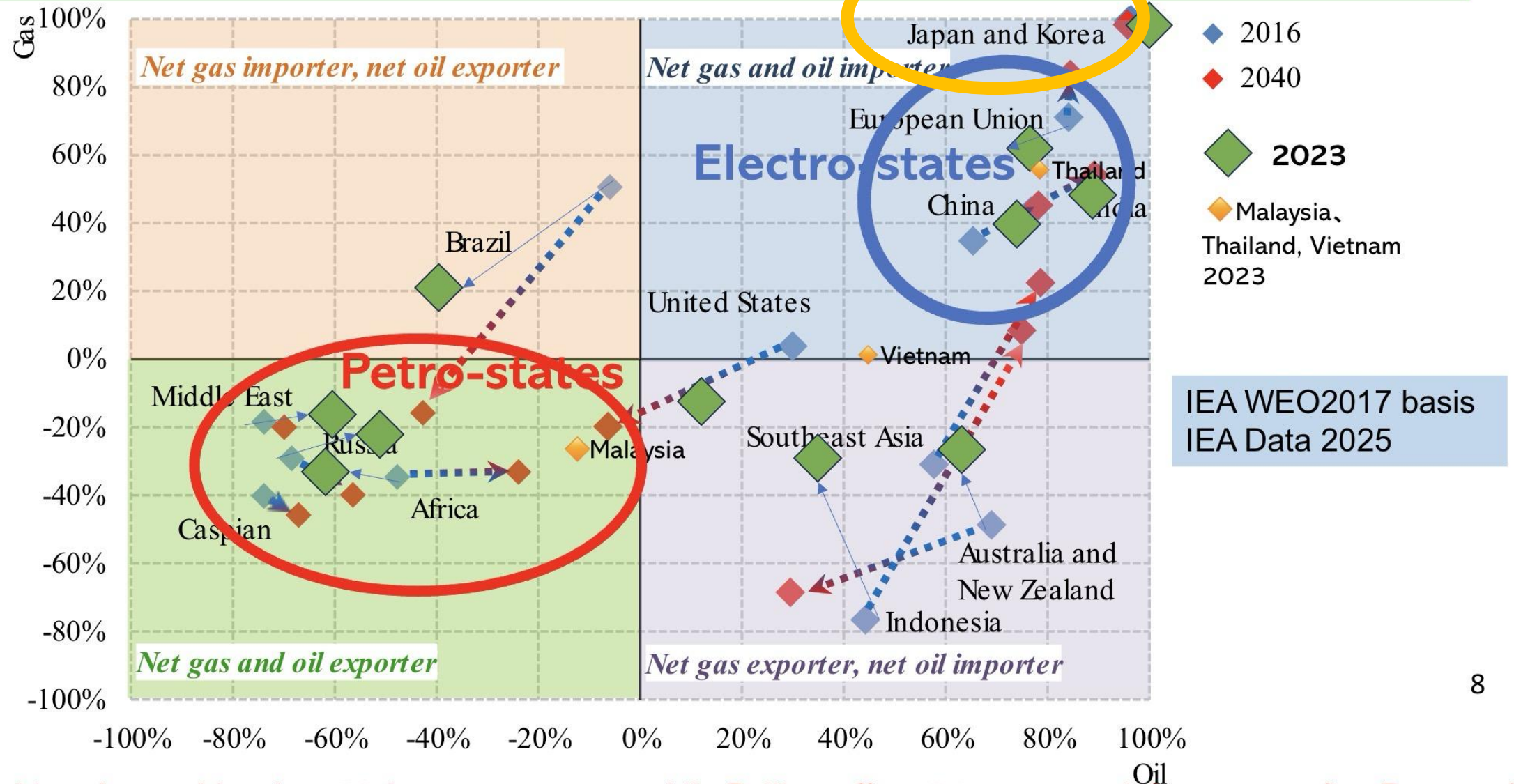
Energy Independence : Trump’s US aims “Energy Dominance” by more oil and gas while China and Europe aim at Renewable Energy Independence.



Energy Independence : Trump’s US aims “Energy Dominance” by more oil and gas while China and Europe aim at Renewable Energy Independence.

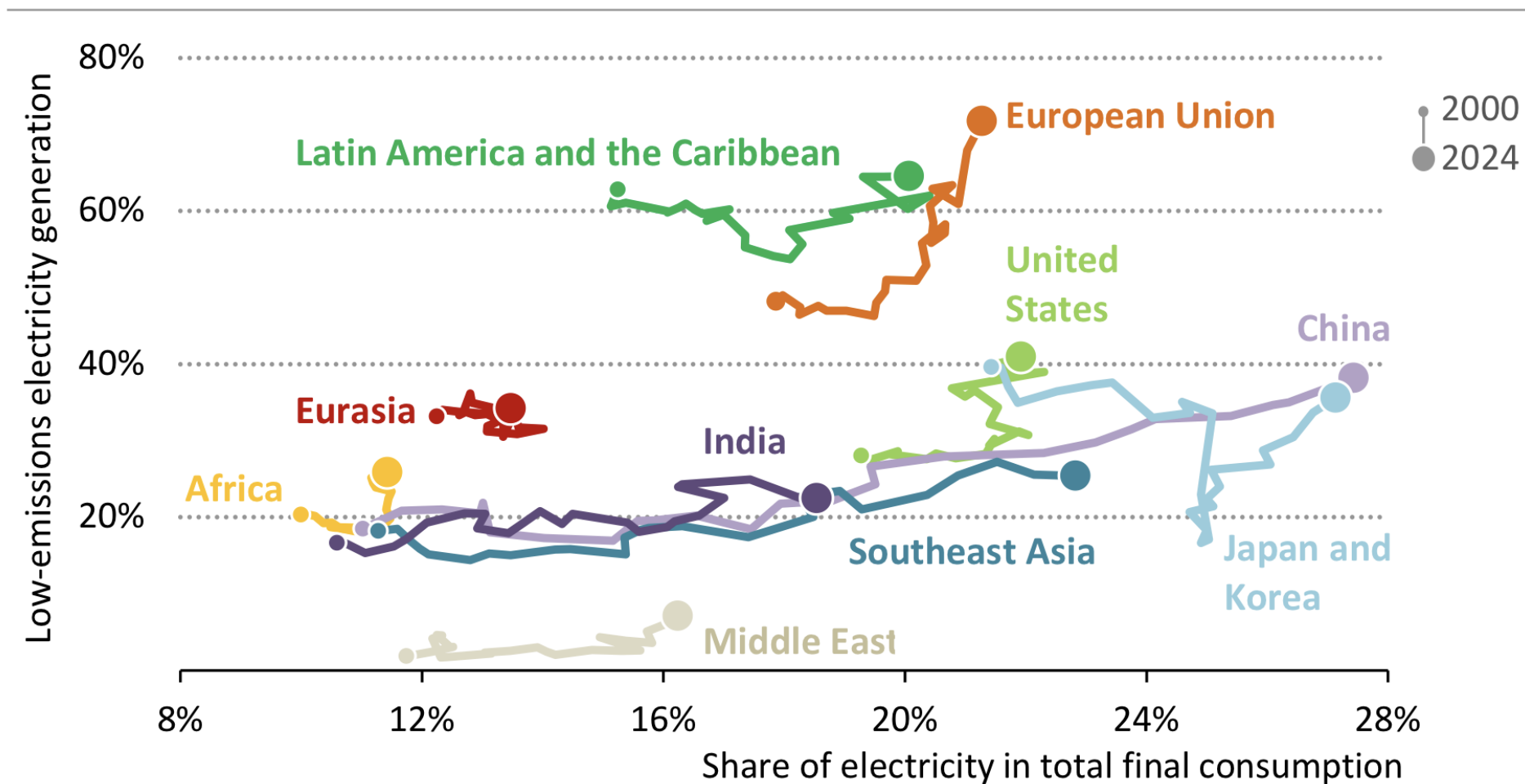


Petrostates v.s. Electrostates: Asia will aim at Electro states. Japan and Korea, for sure.



Electrification and Decarbonization: China and EU are winners

electricity generation by region, 2000-2024

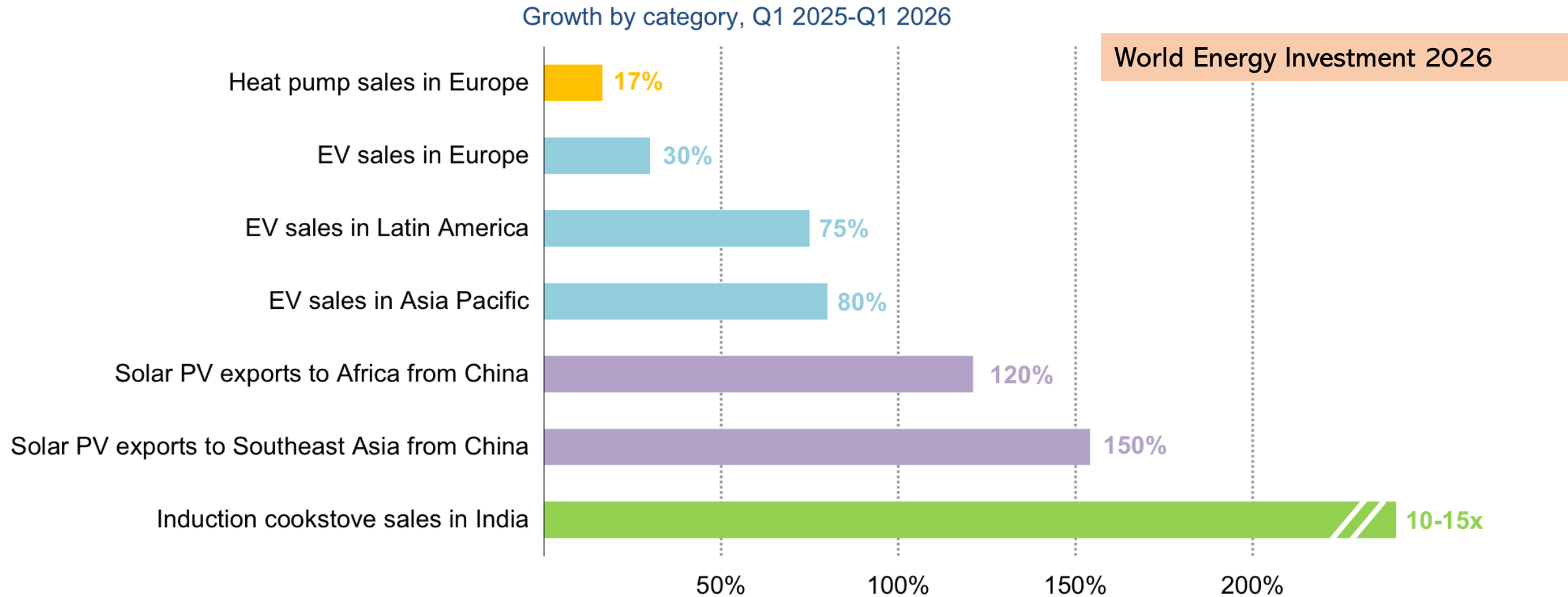


World Energy
Outlook 2025

IEA. CC BY 4.0.

Renewables and nuclear electricity have evolved unevenly across regions since 2000, end-use electrification also varied, growing particularly rapidly in Asian economies

Early signs of Acceleration of Electrification



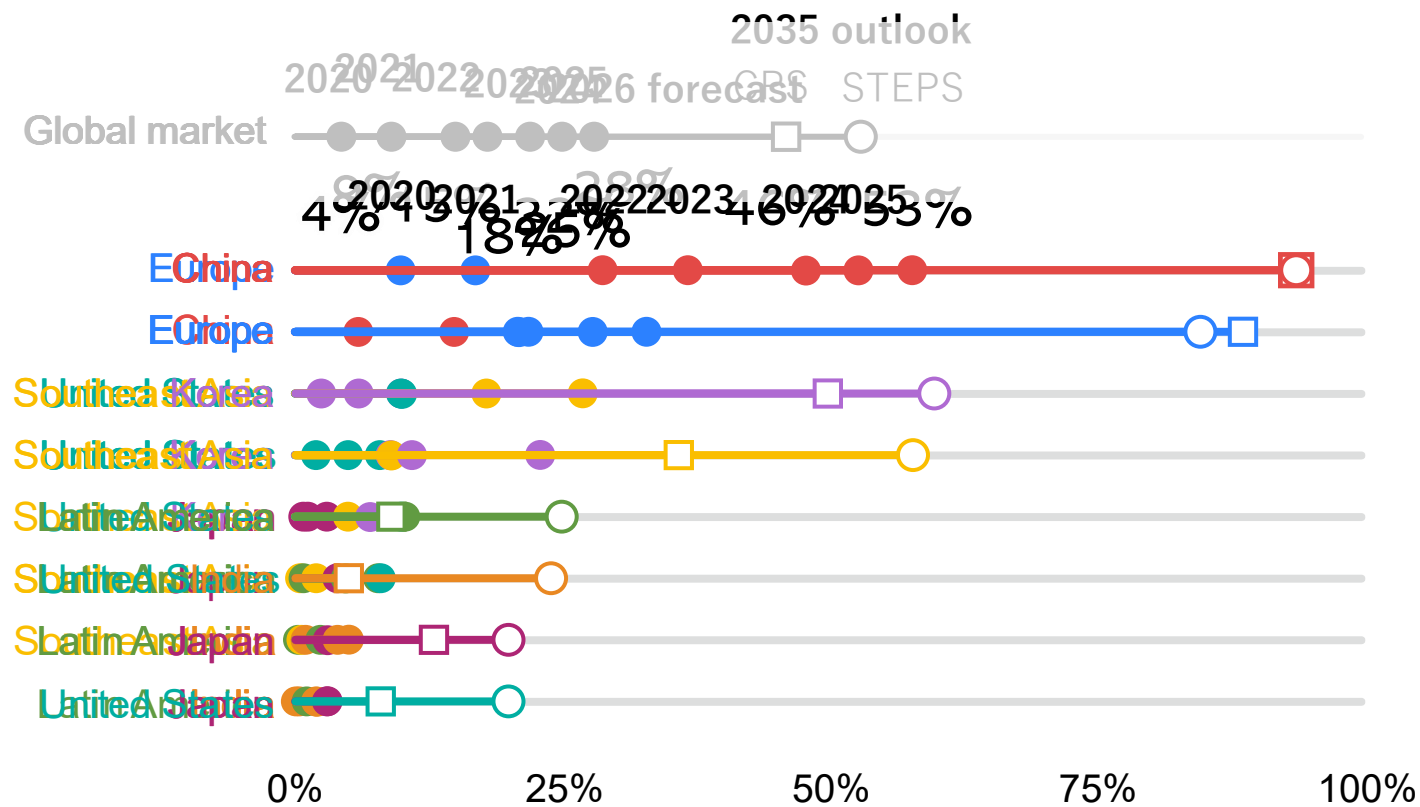
IEA. CC BY 4.0.

There has been strong growth in Q1 2026 spending on key categories including heat pumps, EV sales and solar PV in some regions. In India, LPG supply disruptions led to a surge in induction cookstove sales.

Electric car sales are spreading globally

Electric car sales shares

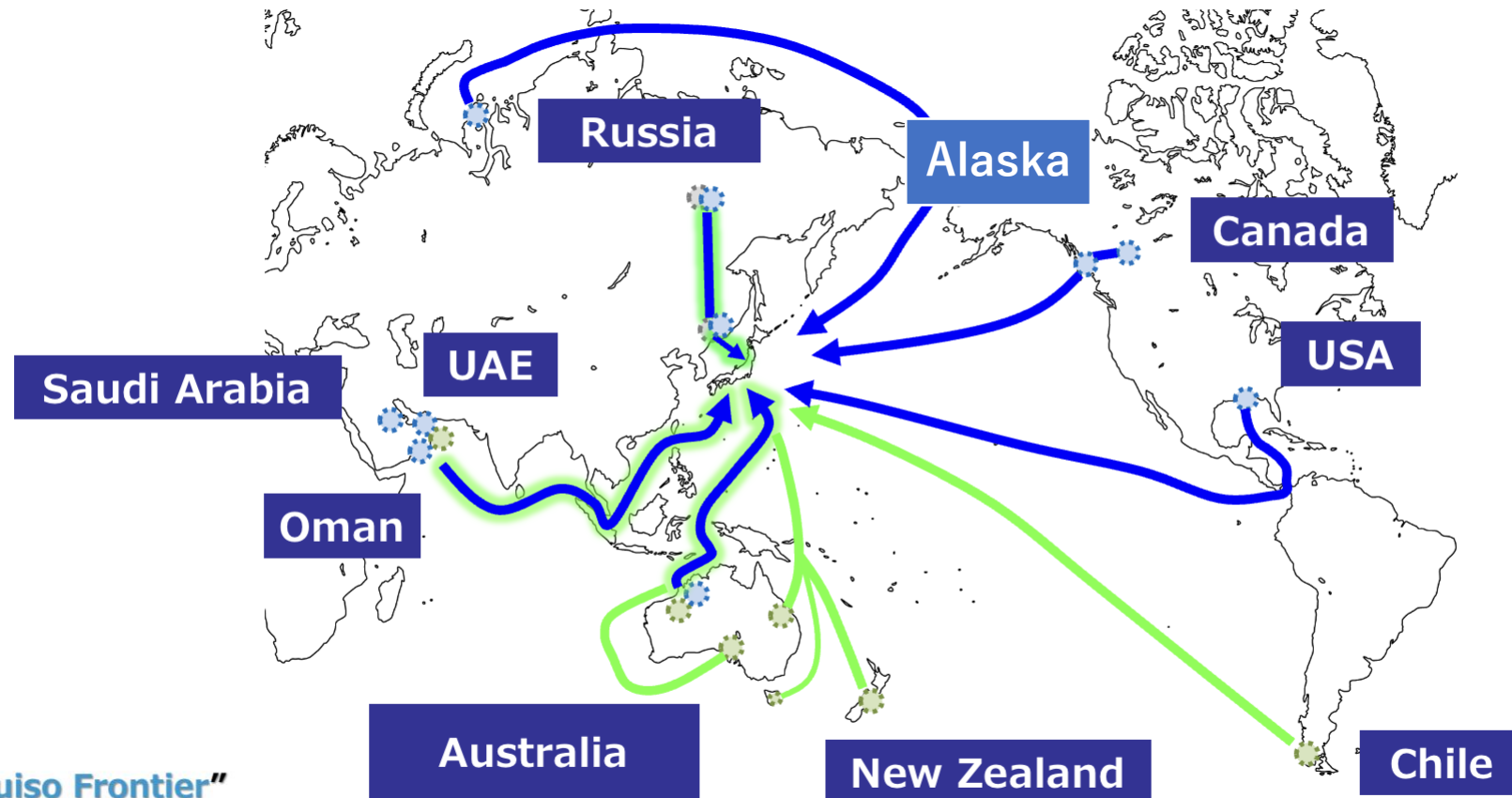
Global EV Outlook 2026



Over 100 countries recorded electric car sales growth in 2025; in one-third of these markets, electric cars reached at least 10% market share. Many markets are set to see a jump in sales to 2035 based on existing policies.

A Golden Age of Hydrogen is coming?

MCH will provide a stockpile tool of Hydrogen for electrostates



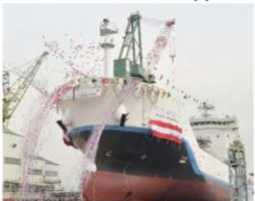
➡ Natural Gas (Blue)

➡ Renewables (Green)

8

Liquefied Hydrogen Carrier "Suiso Frontier"

Launch ceremony (11 December 2019)
at KHI Kobe Shipyard



Cargo Tank Installation (7 March 2020)
at KHI Harima Works

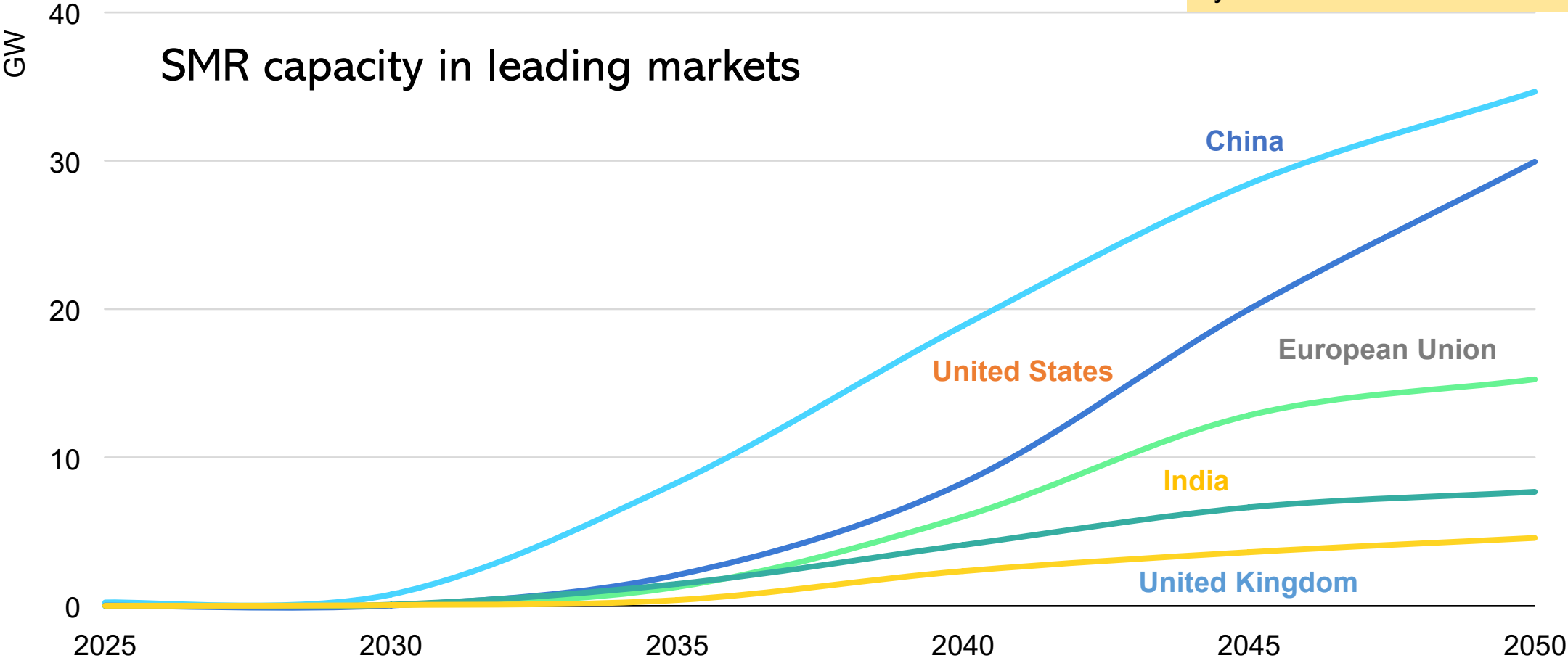


CLEAN FUEL AMMONIA ASSOCIATION

SMRs are set for rapid growth

Data centres are emerging as a new dedicated market for SMRs

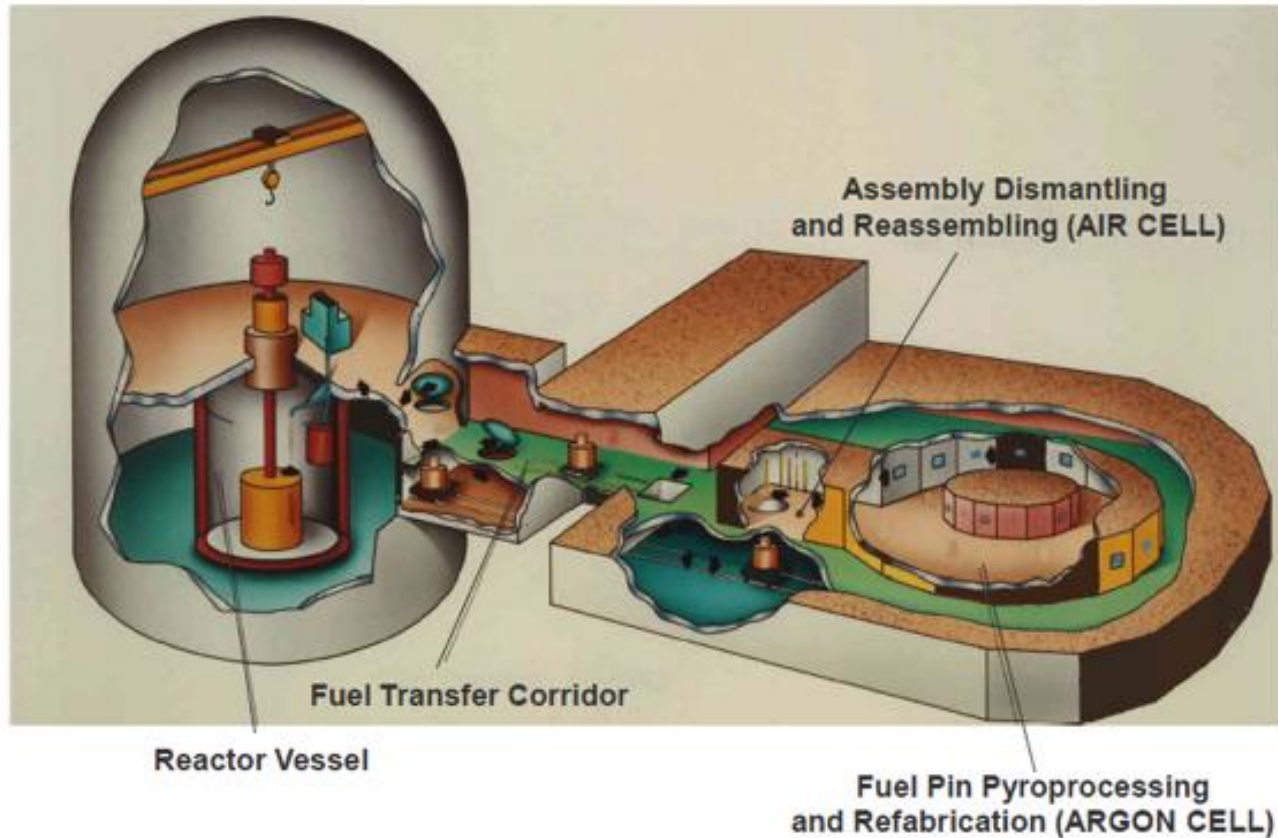
“The Path to a New Era for Nuclear Energy”
by IEA 2025



Innovation, government support and new business models can open a new era for nuclear energy, with over a thousand SMRs totalling 120 GW by 2050, and cumulative investment of USD 670 billion

Closing the cycle: Time for Safer, Proliferation resistant and Easier Waste Management SMR: **Integral Fast Reactor (Metallic fuel, Close cycle Fast Reactor) and Pyroprocessing**

Pyroprocessing was used to demonstrate the EBR-II fuel cycle closure during 1964-69



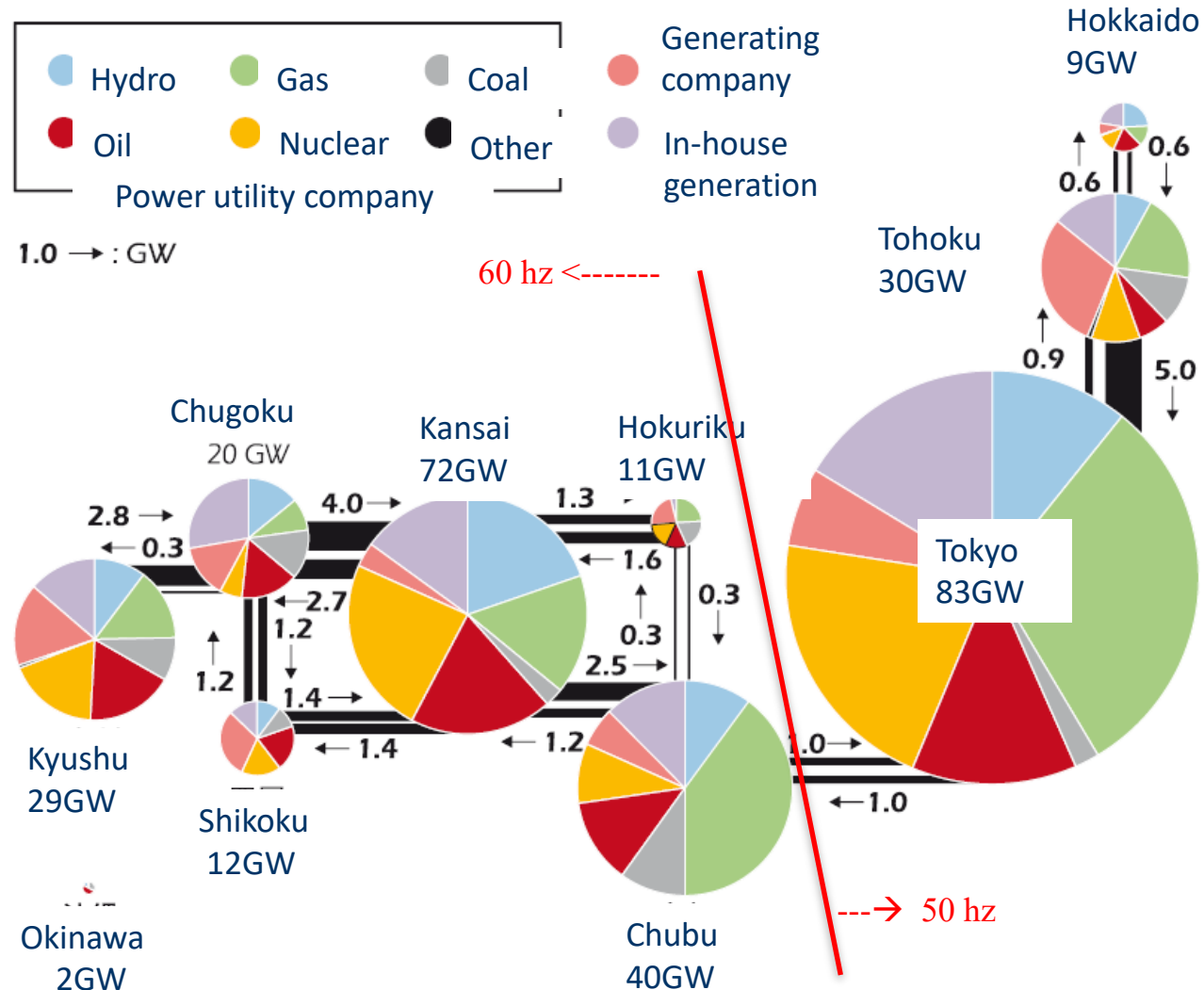
IFR has features as Inexhaustible Energy Supply ,Inherent Passive Safety ,Long-term Waste Management Solution , Proliferation-Resistance , Economic Fuel Cycle Closure. High level waste reduces radioactivity in 300 years while LWR spent fuel takes 300,000 years.
Applicable to the Fukushima debris

Dr. YOON IL CHANG
Argonne National Laboratory

Lack of Grid connectivity in Japan

There are only two countries in the world who have two frequency zones.
Japan and Liberia.

Kyushu Electric Power Company should survive as
“Kyushu-Asia Electric Power Company” by connecting Grid lines with Korea and China.

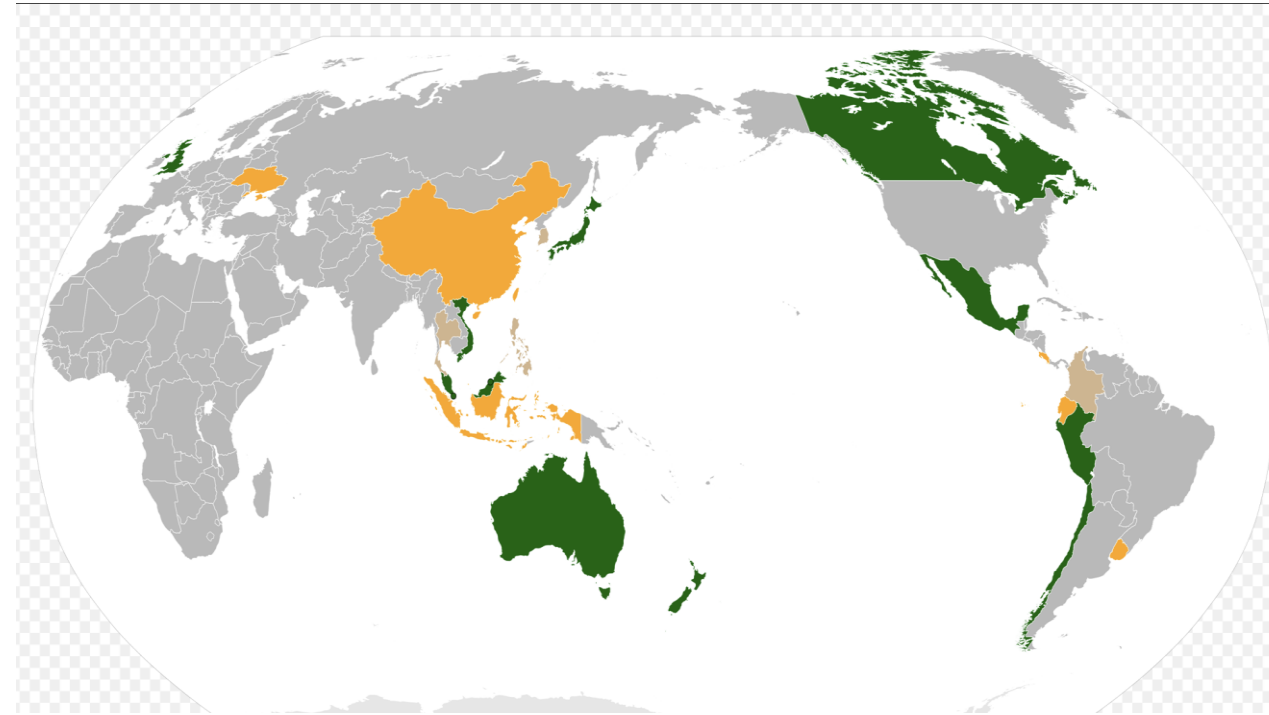


Source: Agency for Natural Resources and Energy, The Federation of Electric Power Companies of Japan, Electric Power System Council of Japan, The International Energy Agency

Expansion of CPTPP

Comprehensive and Progressive Agreement for
Trans-Pacific Partnership

- UK joined 2023, Ukraine applied.
Why not EU with CBAM
- China and Taiwan applied 2021
- Indonesia applied 2024
- UAE applied, Korea applies soon.
- RCEP (China, Japan, Korea and
ASEAN) & India?
- AZEC as Energy Union



Expansion of CPTPP

Comprehensive and Progressive Agreement for
Trans-Pacific Partnership

Alliance of Electro-states vs Isolated Carbon Island of America

- Indonesia applied 2024
- UAE applied, Korea applies soon.
- RCEP (China, Japan, Korea and ASEAN) & India?
- AZEC as Energy Union

Time for “Pax Electrica” !