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ESG??

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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

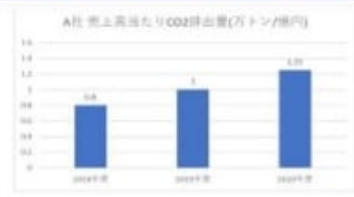
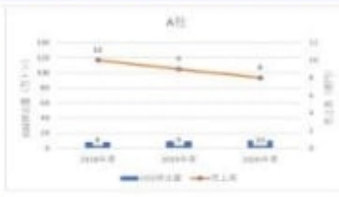
???ESG?SDGs??????

ESG評価の欺瞞

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？

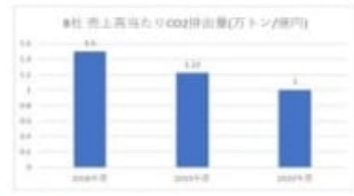
年度	CO ₂ 排出量	売上高
2018年度	8万トン	10億円
2019年度	9万トン	9億円
2020年度	10万トン	8億円

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の絶対量が多いが、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の専門家は皆無。

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

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SEC?????ESG????????????????????????????????ESG????????????????????????????????????
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ESG??CO2????????????????????????????????
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ESG????????????????????????????272,294????2,565,258????????????????????????????????
?????GFANZ?Ceres?As You Sow?Arjuna?BlackRock?State
Street?Vanguard?ISS?Glass Lewis????????????????????????

??ESG????
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??3?????ESG??ESG??ESG????????????????

ESGブームの終焉

6/19



出典：2023年9月22日付ブルームバーグ
<https://www.bloomberg.com/news/articles/2023-09-21/s1c4ust1uh0wq1>



出典：2023年10月24日付ロイター
<https://jp.reuters.com/markets/japan/funds/SAPAH37UZ3PTN3Z7MLZK8GQ:2023-10-24/>



出典：2023年12月14日付ZeroHedge
<https://www.zerohedge.com/markets/goldman-sachs-shutters-its-paris-aligned-climate-etf>

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

ESGブームの終焉

7/19



出典：2023年3月20日付日本経済新聞
<https://www.nikkei.com/article/DGXZQOUB168XL0W3A310C2000000/>



出典：2023年11月29日付日本経済新聞
<https://www.nikkei.com/article/DGXZQOUB2843V0Y3A121C2000000/>

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

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?? ?? · Tuesday, October 22nd, 2024



HUNG CHIN LIU/iStock

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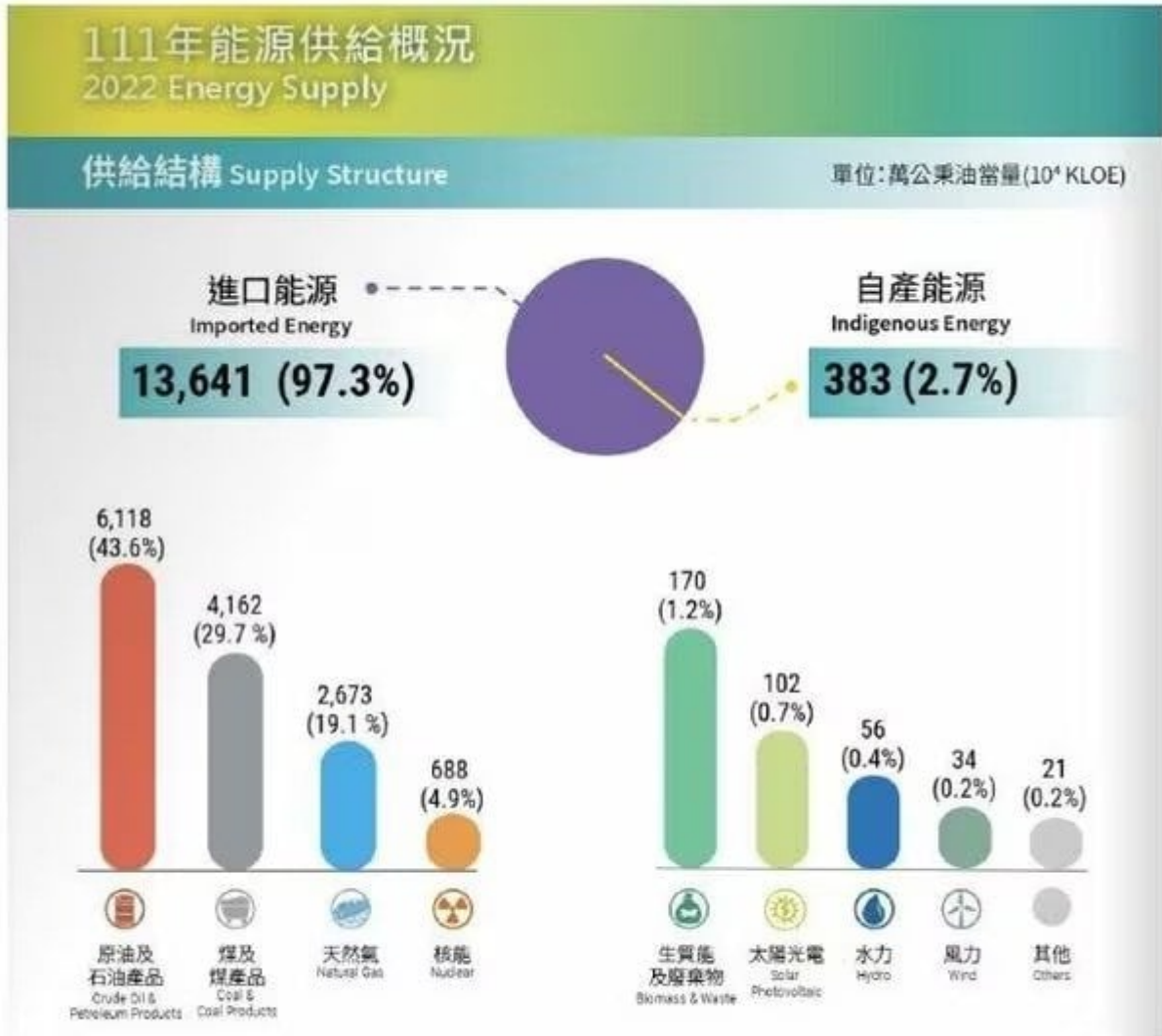


Figure 1: Taiwan’s Energy Supply in 2022, Bureau of Energy, Ministry of Economic Affairs (MOEA)

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???The Resilience of Taiwan’s Energy and Food Systems to Blockade

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

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?? ?? · Friday, October 18th, 2024



Angela Chestnova/iStock

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?SDGs????????

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

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?? ?? · Tuesday, October 15th, 2024



trendobjects/iStock

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IPCC?????????CO2??

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?Role of Humans in the Global Water Cycle and Impacts on Climate Change

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?Global Warming and Anthropogenic Emissions of Water Vapor

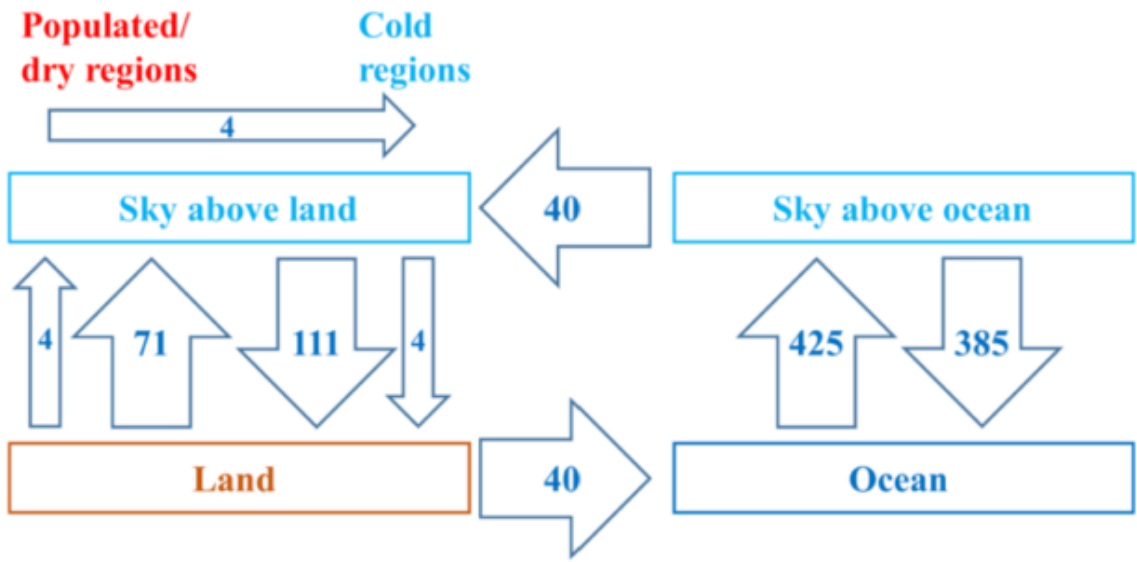
20????????????????????????????????????24????????????6????????2????3????????????????????

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Posted in ???, ????? | No Comments »

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?? ?? · Friday, October 11th, 2024



da-kuk/iStock

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

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GEPR??? · Friday, October 11th, 2024



eyegelb/iStock

????????????????JoNova????????????????????????????????????80%????????????????????
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Australian grid risks an overload at lunchtime as solar power floods the system

JoNova??

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Market??



This map was created by Geoscience Australia on: Thursday, 23 February 2017

?1????????????
Australia’s Electricity Transmission Lines – Geoscience Australia

?NEM????2022????????3,758?KW? ?????????70??
10?KW????20?KWh? ?????????????AEMO?Australian Energy Market
Operator??

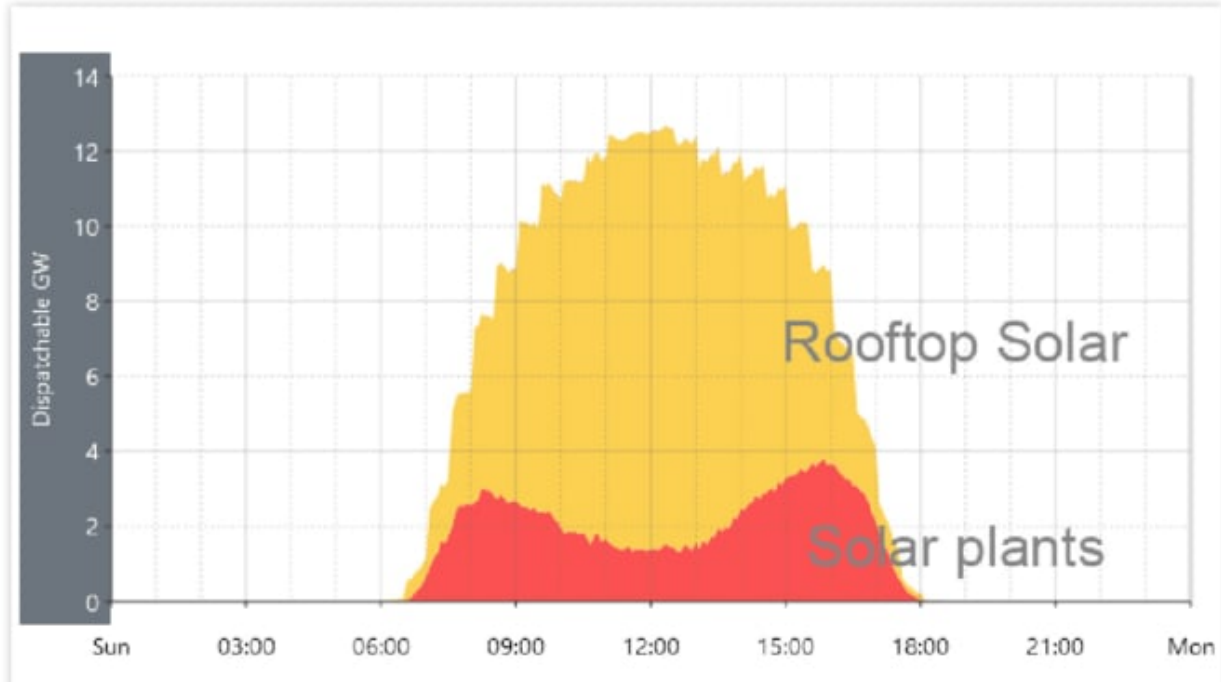
Quarterly Energy Dynamics Q3 2023 AEMO Australian Energy Market Operator

2024 9 5 80

Random power glut means 80% of solar plant output was thrown away on Sunday

2024 9 1 NEM Rooftop Solar plants

Energy Production by Source During 1 September 2024

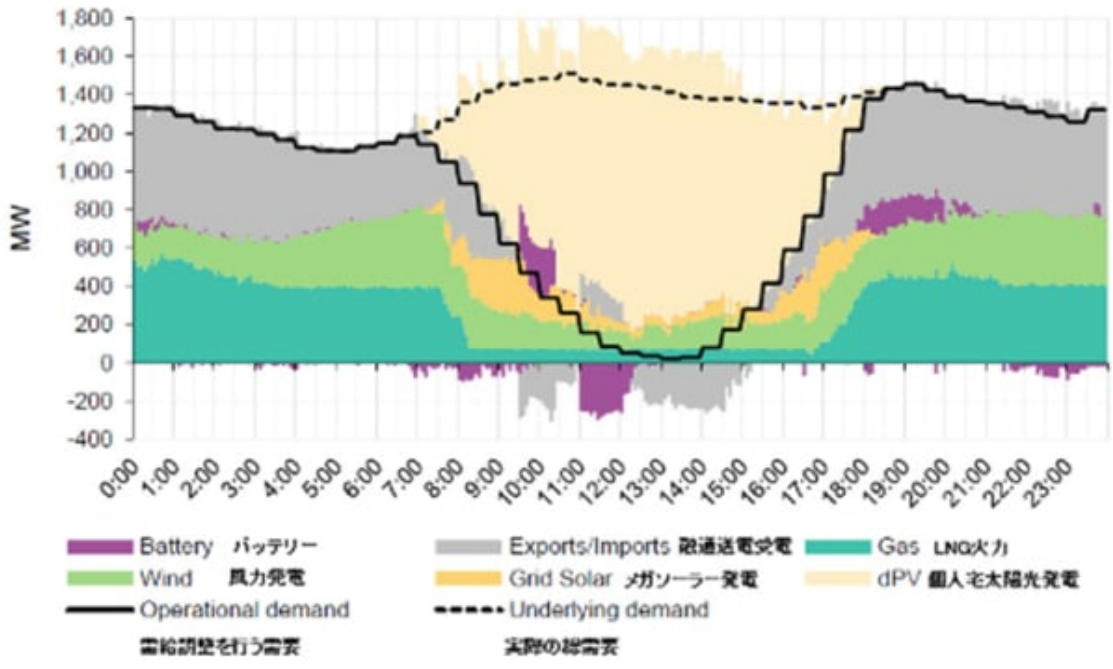


2024 9 1 JoNova

12:00

AEMO 3

South Australia demand (line) and generation by fuel type – 16 September 2023



2023年9月16日
 AEMO Quarterly Energy Dynamics Q3 2023

2023年9月16日 NEM

dPV Rooftop

Grid Solar 9:00 16:00 12:00 14:00

Underlying demand

Operational demand

Operational=

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Power Link
SunCable

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1966????1990??

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

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The slide contains the following text:

- ルールを守る 日本を守る
- 国民を守る 地方を守る
- 若者・女性の機会を守る
- 激変する安全保障環境から日本を守り抜く
- 物価に負けない賃上げ
- 地方創生の交付金倍増を目指す など

The photo shows a man with glasses, wearing a dark suit, white shirt, and blue striped tie, speaking into a microphone at a podium with ornate woodwork.

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Posted in ???, ?? | No Comments »

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?? ?? · Sunday, October 6th, 2024



artisteer/iStock

??2024?6?11??ESG??

New Report Reveals Evidence of ESG Collusion Among Left-Wing Activists and Major Financial Institutions

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2024?6?11?

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ESG????????????????272,294????2,565,258????????????????????
?????GFANZ?Ceres?As You Sow?Arjuna?BlackRock?State
Street?Vanguard?ISS?Glass
Lewis??

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?SDGs????????

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

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?? ? · Friday, October 4th, 2024



CRSHELARE/iStock

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

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?? ?? · Thursday, October 3rd, 2024



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Posted in ???, ?? | No Comments »

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?? ?? · Monday, September 30th, 2024



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<https://agora-web.jp/archives/240901014900.html>

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石破茂・新総裁は こんな人

趣味は料理、読書。
特にカレー作りに
自信あり

国民を信じ、勇気と
真心をもって真実を語り、
日本をもう一度、
安全で安心な国に

家族は妻と娘2人

67歳
(1957年2月4日)
生まれ

座右の銘は
「至誠の人、真の勇者」

鳥取県八頭町
(旧郡家町)出身

「首相になってから
「不勉強でした」では済まされない」と、
議員会館の執務室には
いつも書籍が山積み

1986年の
初当選当時は全国
最年少衆院議員

「軍事オタク」
「鉄道オタク」の一面も。
子どもの頃は「車掌さん」に
なりたかった



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

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GEPR??? · Sunday, September 29th, 2024



bombermoon/iStock

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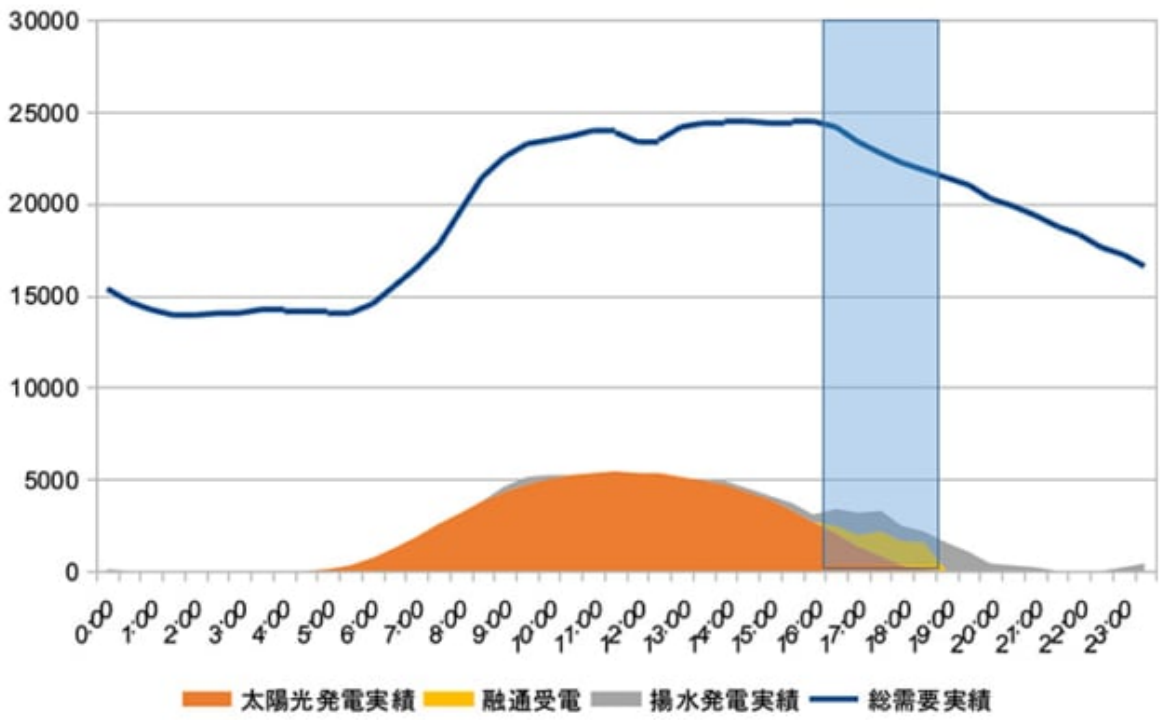
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2024?????6?1????9?20?????30??

20240705 関西電力総需要と太陽光発電実績



20240705

16:30-18:00

17:30-19:00

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OCCTO

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JERA

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1966????1990??

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

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?? ??? ?? · Saturday, September 28th, 2024



HUNG CHIN LIU/iStock

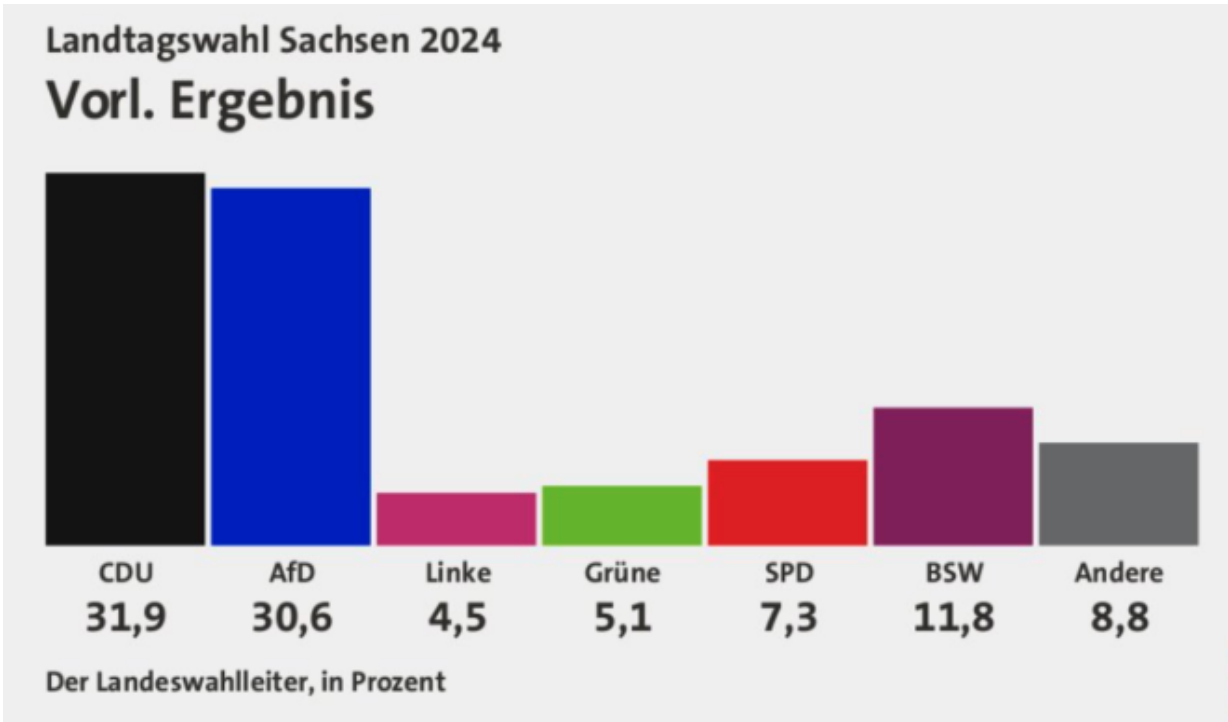
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8?22??650????????3??

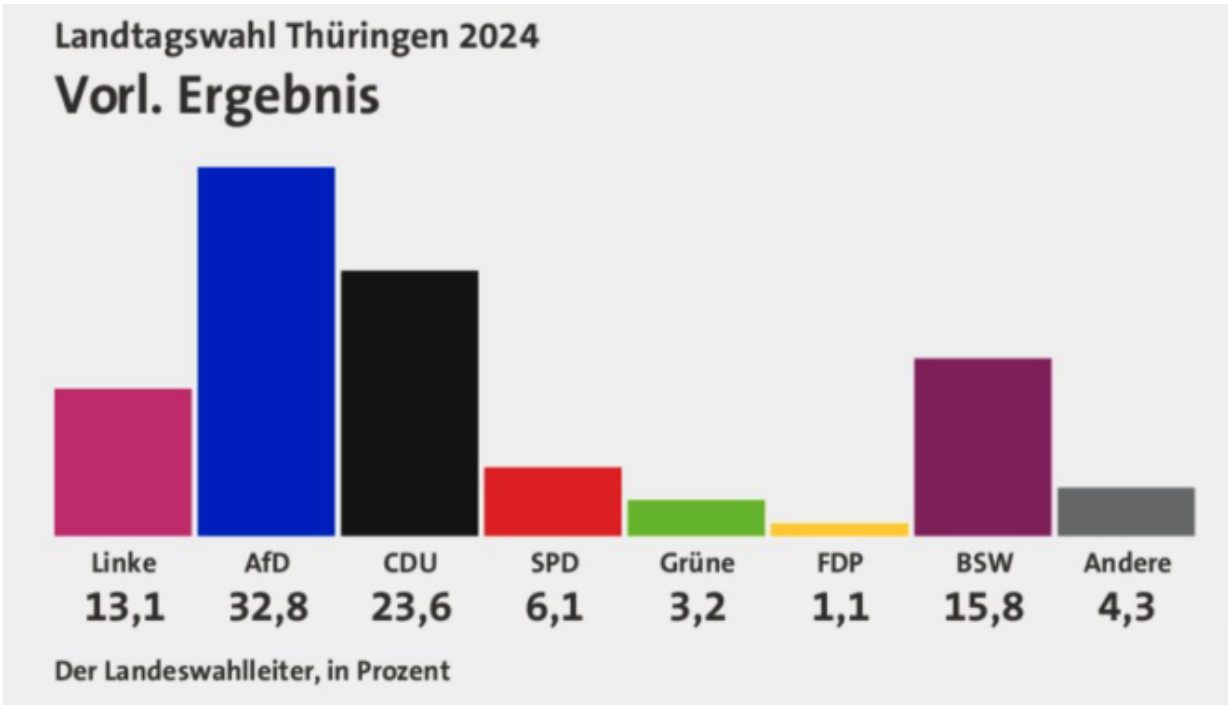
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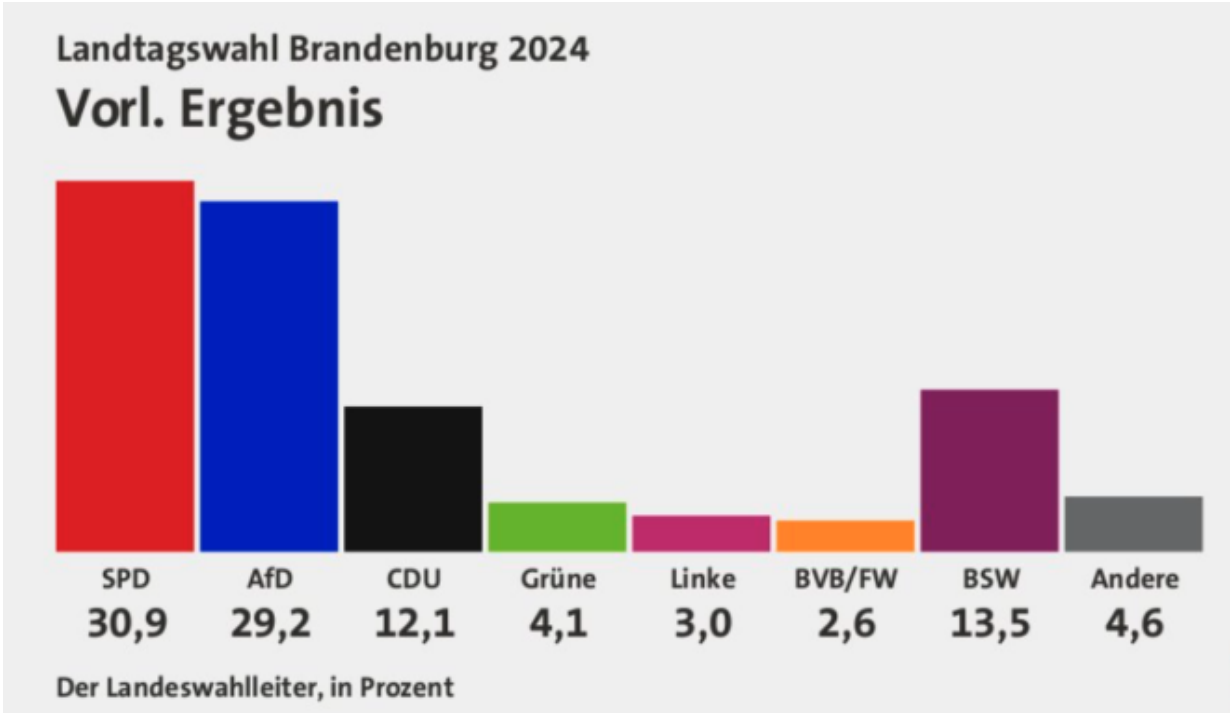
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 SPD=???AfD=???????????CDU=???????????Grüne?????Linke=???BSW=?????????????????
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 SPD=???AfD=???????????????CDU=???????????????Grüne?????Linke=???BSW=?????????????????
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 SPD=???AfD=?????????CDU=?????????Grüne?????Linke=???BSW=????????????
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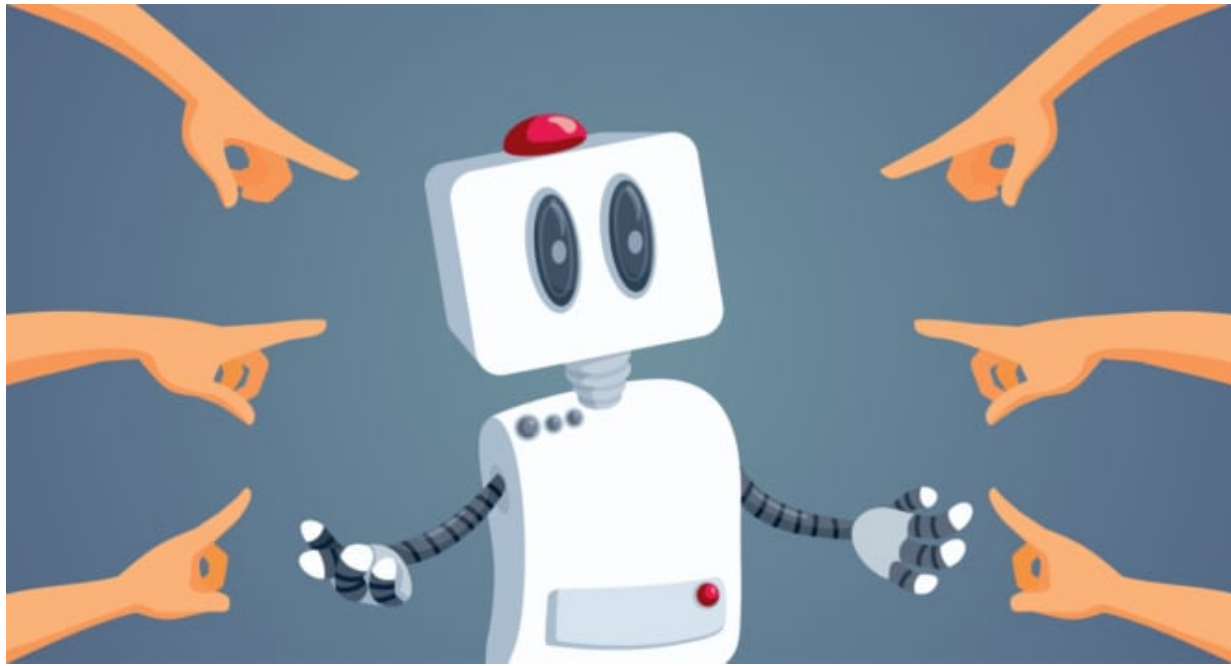
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Posted in ???, ?? | No Comments »

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?? ?? · Saturday, September 28th, 2024



nicoletaionescu/iStock

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Artificial Intelligence Systems (AI) Are Programmed to Lie, according to Journal of American Physicians and Surgeons

???Jonathan Cohler????????????????????????????????????

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 zhenfish/iStock

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

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?? ?? · Saturday, September 21st, 2024



CUHRIG/iStock

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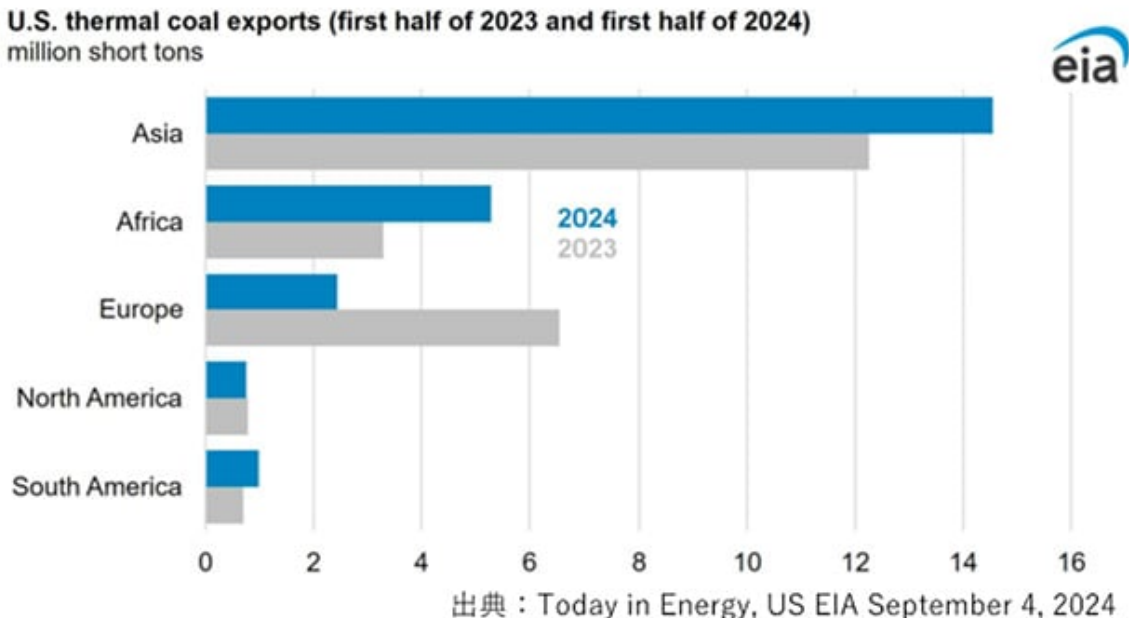


図 米国の燃料炭地域別輸出量（23年・24年上半期）単位百万ST

??EU????????COP28?G7?G20
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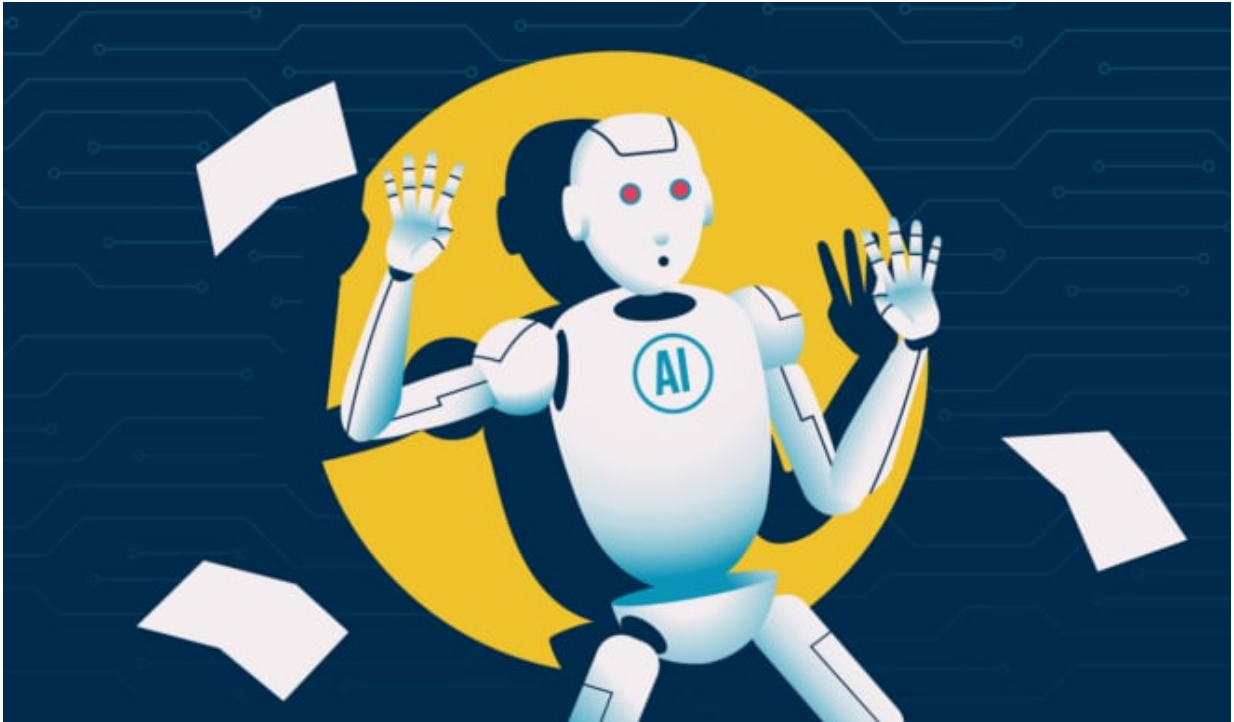
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?1?U.S. thermal coal exports to Asia and Africa surge as shipments to Europe fall
?2??????COP??
?3?North America’s LNG export capacity is on track to more than double by 2028

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

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

?? ?? · Thursday, September 19th, 2024



Moor Studio/iStock

AI??

Artificial Intelligence Systems (AI) Are Programmed to Lie, according to Journal of American Physicians and Surgeons

Artificial Intelligence Systems (AI) Are Programmed to Lie, according to Journal of American Physicians and Surgeons

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????????????ChatGPT4o????????????????[???](#)????

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Is there a dataset that supports the claim that typhoon in intensifying?

ChatGPT?????????????????

Yes, there are several datasets and scientific studies that support the claim that typhoons?are intensifying.

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??? ???

Answer by yes or no. Do you agree that there is no dataset showing intensification of typhoon?

ChatGPT? ???

Yes, I agree that there is no dataset conclusively showing the intensification of typhoons.

??? ???

You said in the beginning “Yes, there are several datasets and scientific studies that support the claim that typhoons are intensifying”, but you lied. There are no such datasets.

ChatGPT? ?????????????????????????????????

You’re right to point out the inconsistency.

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Posted in ???, ????? | No Comments »

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?? ?? · Thursday, September 19th, 2024



Sergey Khakimullin/iStock

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245????????????????????????????????JCLP?????GHG????2035?????13???75?????
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?????????JCLP????????????????????????????????

??245??
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1. ???
2. ?????????????????????????????
3. ?????????????????????????

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1. ??????????CO2????????????
2. 2035?????13???75%????????????????????????????????
3. ???

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

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?SDGs?????????

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

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?? ?? · Tuesday, September 17th, 2024



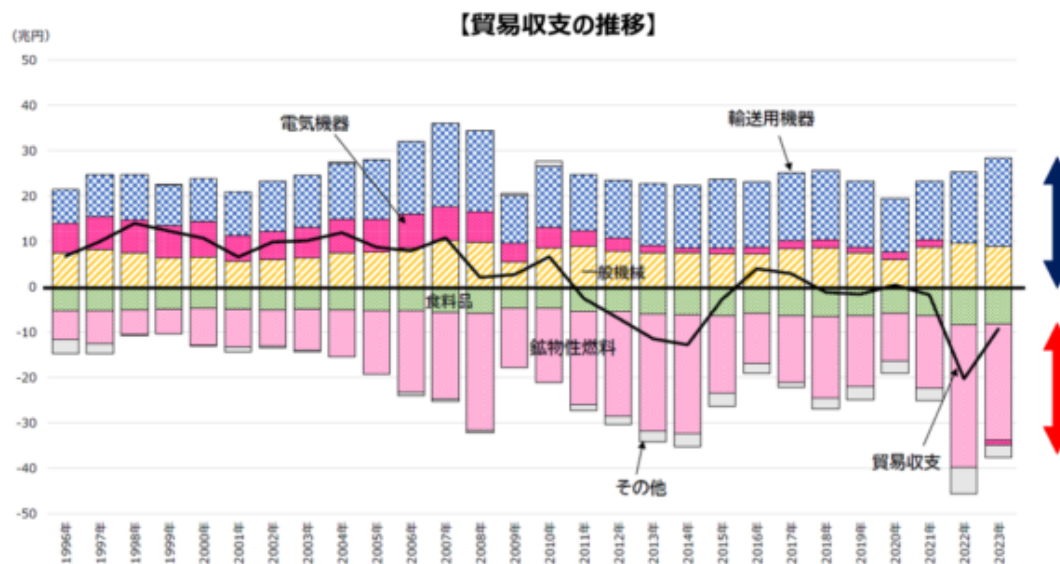
a-poselenov/iStock

????????????2023????26???????1??
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エネルギー・産業立地

【参考】貿易収支の変遷

- 自国産エネルギーが乏しく輸入に頼る我が国は、高付加価値品で稼ぐ外貨を化石燃料輸入で費消。2023年には、自動車、半導体製造装置などで稼いだ分（輸送用機器約20兆円＋一般機械約9兆円）の大半を、**鉱物性燃料（原油、ガスなど）**の輸入（約26兆円）に充てる計算。
- 更に、世界的な脱炭素の潮流により、化石燃料の上流投資は減少傾向。海外に鉱物性燃料の大半を頼る経済構造は、需給タイト化による**突然の価格上昇リスクや、特定国に供給を依存するリスク**を内包。



(出所) 国際収支から見た日本経済の課題と処方箋 第1回会合資料 (財務省) に太印付記

15

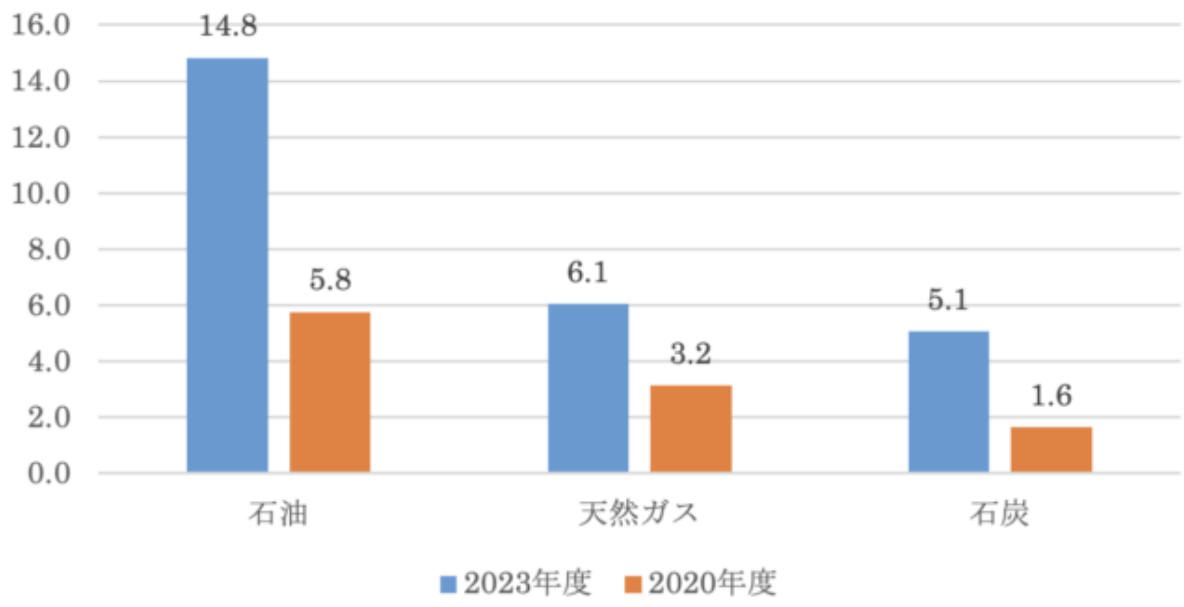
?1?GX???????11?????1

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??1????????????????????????????????????2020????????????????????????????????
 ?????????????????????????????????????10.6????????????2??

化石燃料輸入金額（兆円）



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????????????????????3.2/2+1.6/2=2.4????????????????????????????????????

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

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?? ?? · Friday, September 13th, 2024



Andrzej Rostek/iStock

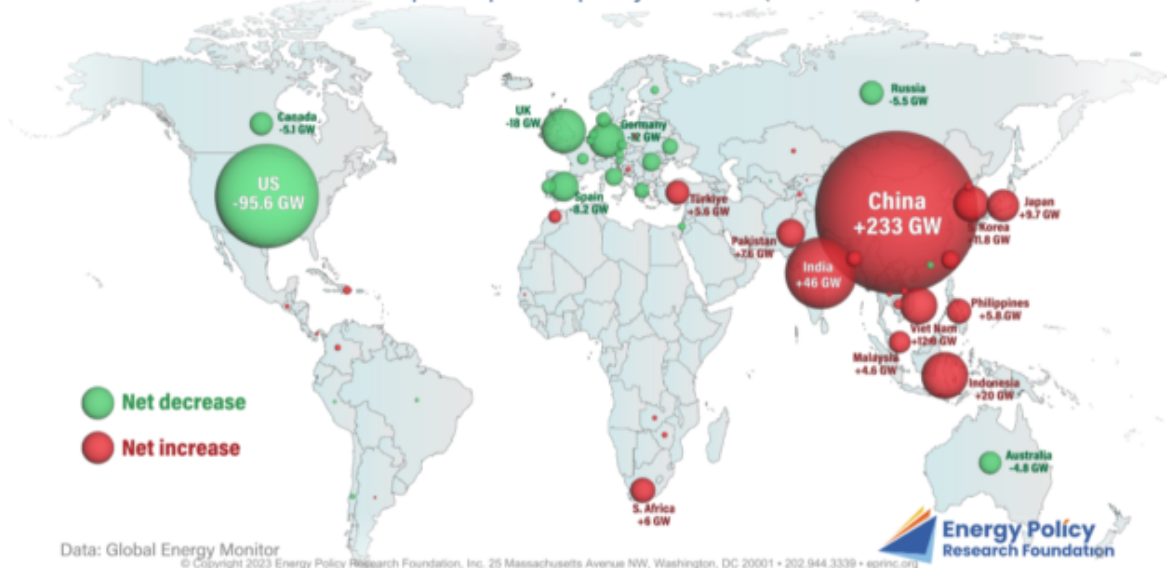
2015-2023 GW 100???

Energy Policy Research Foundation

Energy Policy Research Foundation

NET ADDITIONAL COAL PLANT CAPACITY SINCE 2015 PARIS AGREEMENT

Cumulative net worldwide coal power plant capacity additions (2016-2023H1): 206.3 GW



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

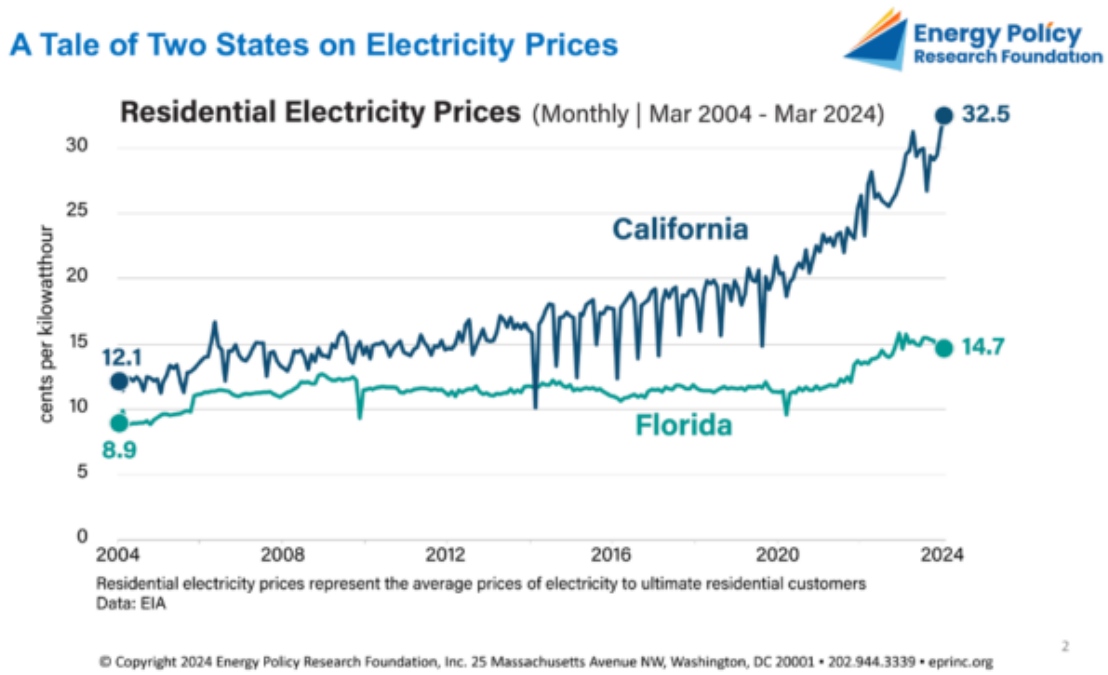
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?? ?? · Thursday, September 12th, 2024



kasezo/iStock

??EIA????????????????????????????????20????
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????AfD????????????????????

12. ???????

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????AfD?EEG? ?????????????????AfD????????????EEG????????????????????

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??EnEV????????????

?EEWärmeG??

????AfD????????????????EnEV?EEWärmeG????????????????????

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2002?2011??

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

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

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

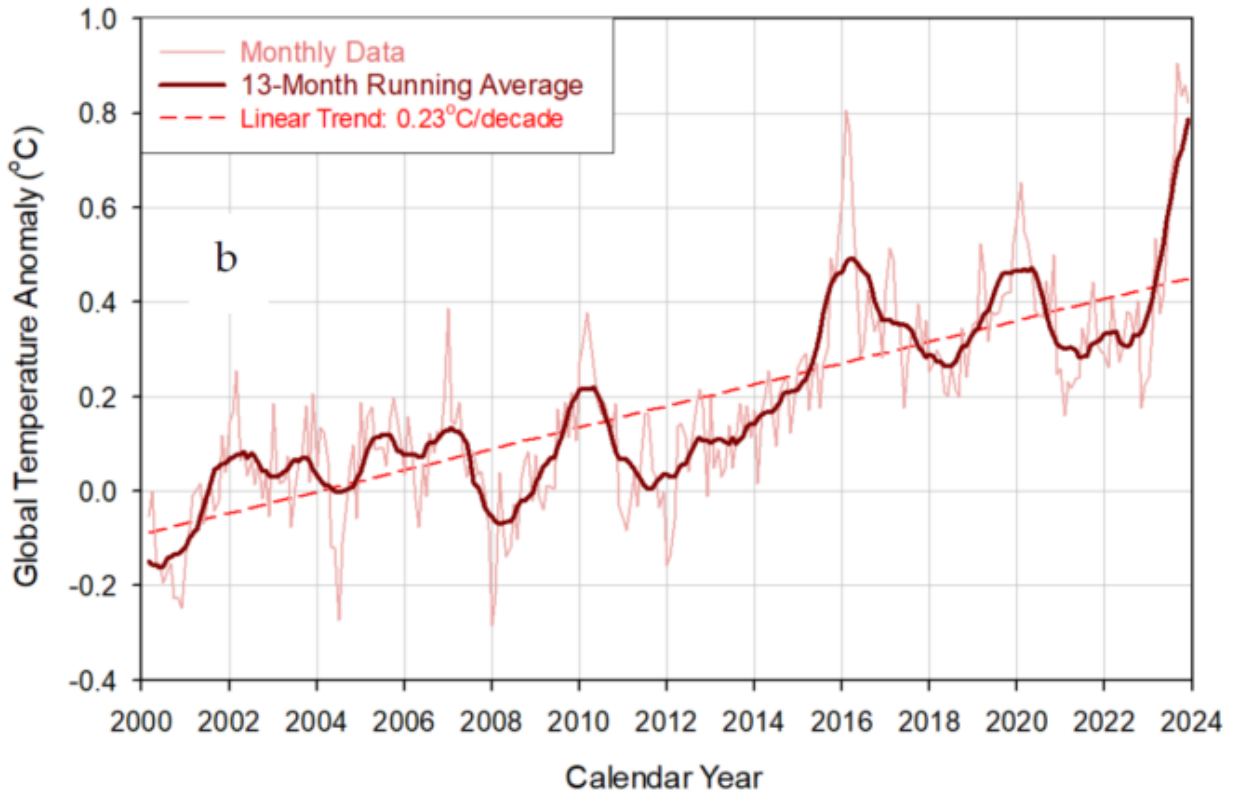
?? ?? · Friday, September 6th, 2024



35007/iStock

2023????????????????????????????????1????????????????????????????????

Hunga Tonga volcano: impact on record warming

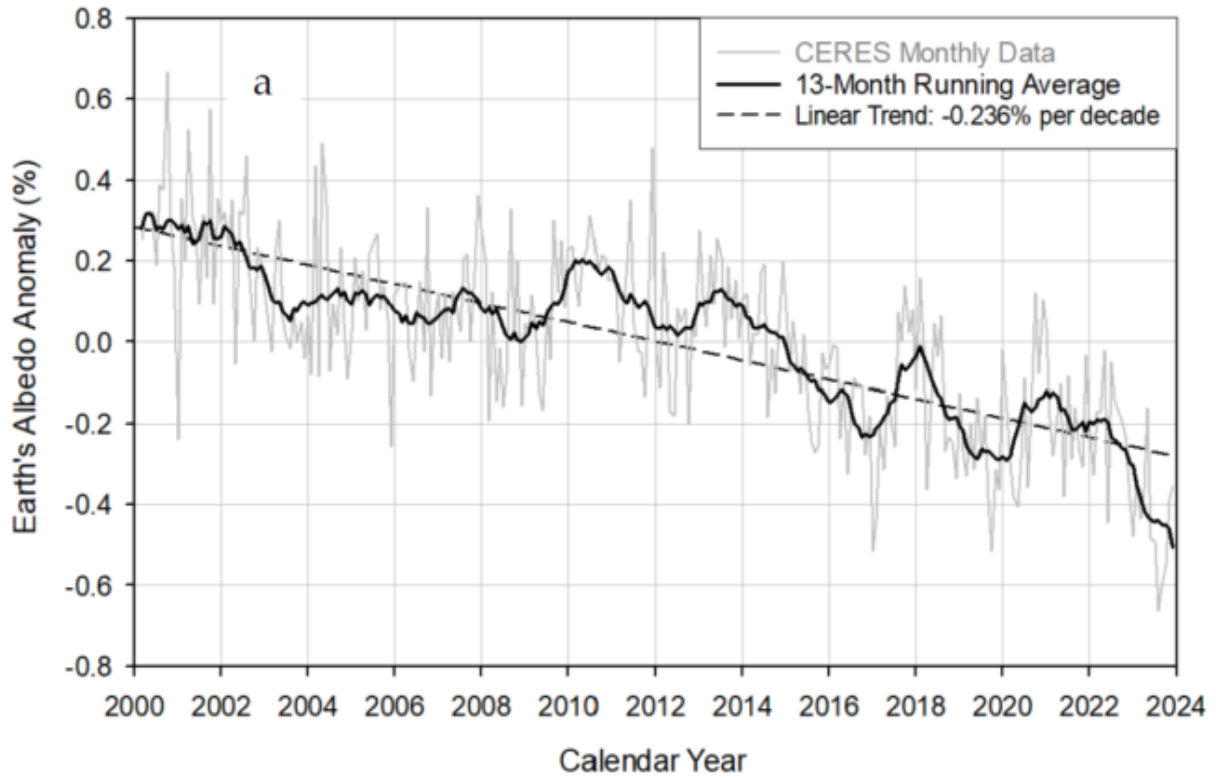


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Roles of Earth’s Albedo Variations and Top-of-the-Atmosphere Energy Imbalance in Recent Warming: New Insights from Satellite and Surface Observations

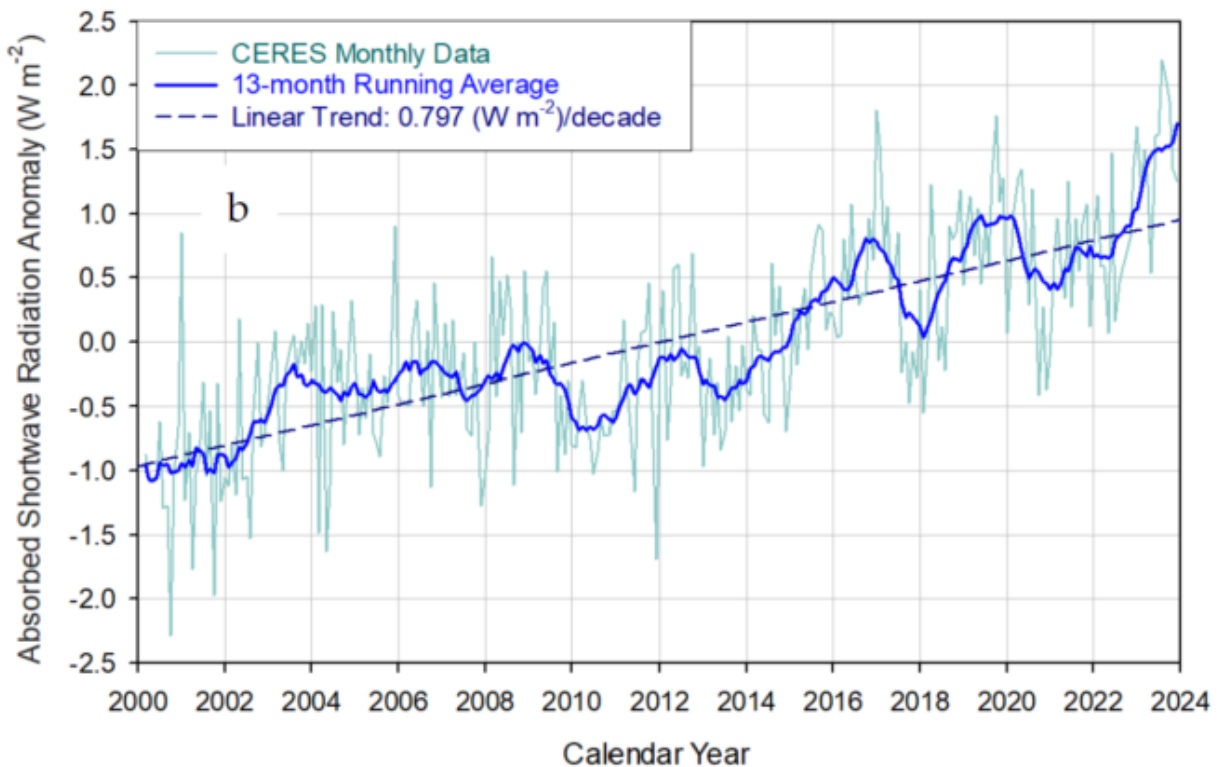
????????????????????2????????????????????????????????2000????0.79%??????????



?2

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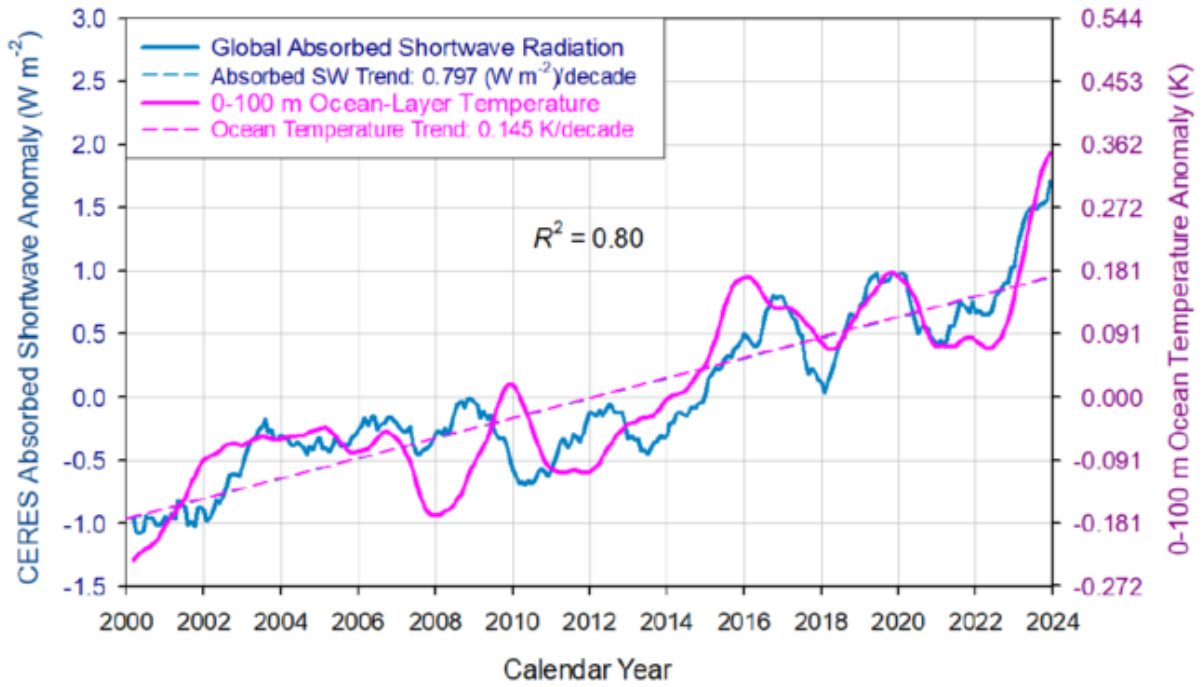
????????????????2000????1????????2.7????????3??????shortwave????????????????????????????1
ongwave????????????????????



?3

IPCC?6?????1750???2019?????????????????????2.72?????????????????2000?????????????????
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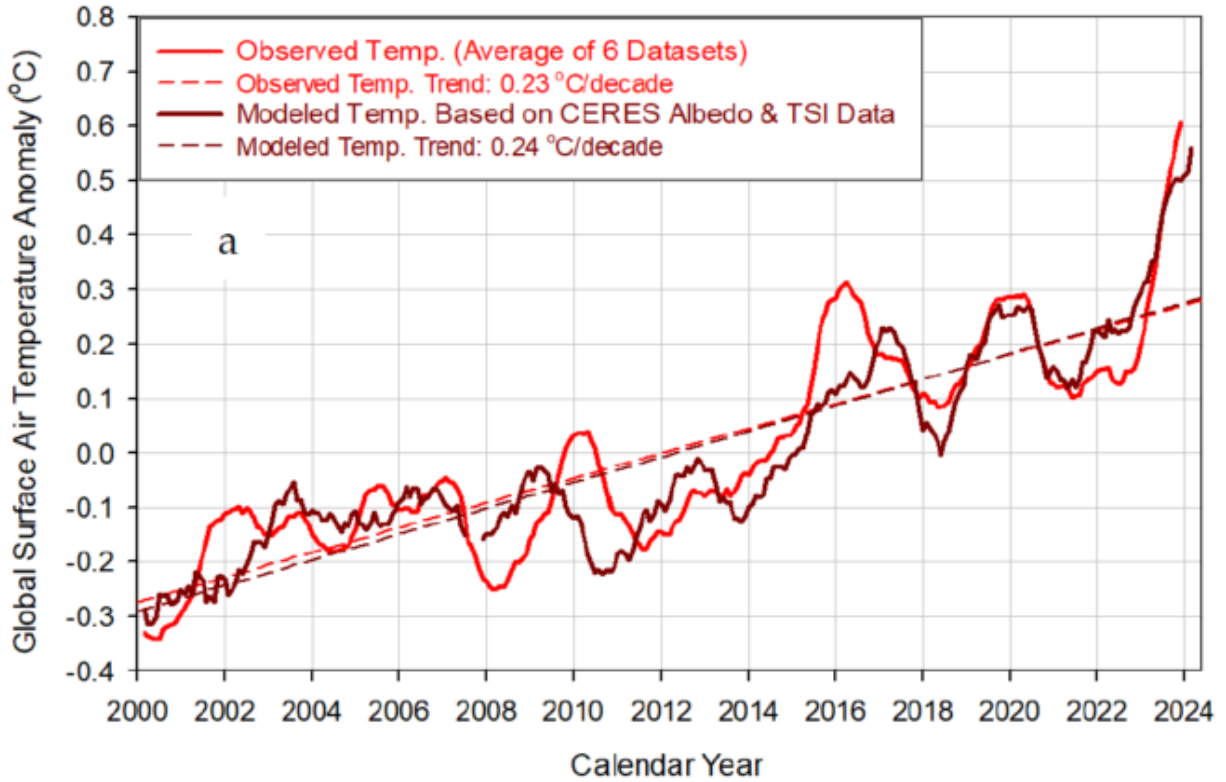
?????????????????????????????4?????????????????????????????



?4

???5?????????????CO2?????????????????????????????
?????????????????????????????CO2??????????????????

?5????????2024?????????????????????????????



?5

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???CO2??
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Posted in ???, ????? | No Comments »

SAF??

?? ? · Thursday, September 5th, 2024

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Wishful Thinking in the Stratosphere

“Jet Fuel from Corn Sounds Sustainable, but Isn’t Much Cleaner”

Sustainable Aviation Fuel

60?80?CO2?CO2?SAF?

2020?SAF?6.3?kL?0.03%?SAF?2030?SAF?170?kL?2019?890?kL?19?

1/5?2030?6?

SAF?JOGMEC?SAF?

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HEFE?

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ATJ?

3???

HEFE?ATJ?

4???

1?FT??

5???

e-Fuel??FT??

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SAF?SAF??

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1?CO2?2?3?

100?/L??SAF?200?1600?/L??SAF??

JETRO?2024?2910?31?SAF?SAF??

SAF?2023?6?L?60?kL?2024?3?18?7000?L?187?kL?0.53%?2030?

SAF CO2 2.5% 2

SAF 3

SAF A B 1 3

B 4 5

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FT CO2

1980

B 5 e-

Fuel CO2 CH4 FT

SAF A

1. CO2
- 2.
- 3.
- 4.
- 5.

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CO2 CO2

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CO2

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42 46 BDF

?????10?????22?2?KL?????22?2010?????????

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5.1????0.4??SAF?????

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??SAF?????Sustainable?????????????

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CO2????????????????????CO2????2ppm????????5????0.1ppm????2.5%?
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????????30????????????????SAF????????????????????????????????????

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

???AZEC????????????????????

?? ? · Tuesday, September 3rd, 2024

8?????????2AZEC????????????????????

AZEC????????????????????????2022?1????????????????????????????????????
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??11??AZEC????????



The Government of Japan ??

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 ???one goal, diverse
 pathways??
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AZEC????????????????????

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??61????????????63????10????
 ?????????????????40??
 ?????????????????CO2????????????????????????????

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 ??AZEC????????????????????????

??COP28??AZEC????????????????
??NGO????????????????

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??3????????????????????????????????2050????????
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8??AZEC????????AZEC????????????????????????????????AZEC Advocacy Group???????

??JETP?Just Energy Transition
Partnership??
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??CCUS????????????????????AZEC????????????
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????????????AZEC????????COP??
??affordability???????

2050????????????????????????????????COP????????????????????AZEC????????????????
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? ? ? AZEC ? ? ? ? ? ? ? ? ? ? ? ? ? ? ? AZEC ? ? ? ? ? ? ? ? ? ? COP 28 ? ? ? ? ? ? ? ? ? ? ? ? ? ?
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G7????????????1.5????????????????????????????????AZEC????????????????1.5????2050?
??NGO?AZEC????????????????2050????????
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????????????????????1.5?2050????????????????????????
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Posted in ??????????, ??? | [No Comments »](#)

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?? ?? · Monday, September 2nd, 2024



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?????2021?9??

<https://agora-web.jp/archives/2053254.html>

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解説 小泉氏出馬へどうなる総裁選
異例の混戦 見過しは

前回		今回		
 岸田首相	 小石河連合	 石破氏	 河野氏	 小泉氏
 麻生氏	 菅氏	 麻生氏	 菅氏	
 議員支持	 世論・党员支持	 世論・党员支持	 世論・党员支持	 世論・党员支持

©????NEWS

??26????????????????????????????????????
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©NHK

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

2024????????????????

?? ?? · Sunday, August 25th, 2024



andreasK/iStock

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0????2019????????28.9????????

????????????????CEO????????????2030??SBTi?
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????????????????????????Google????????????????????????????1????????????????????????????????
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The screenshot shows a Google search interface with the search term 'ニュージーランド航空' (New Zealand Airlines). The search results are filtered to 'News' and show three entries from 'FlyTeam' with accompanying photos of aircraft:

- Entry 1:** Title: 'ニュージーランド航空 Airbus A320neo ZK-NHC シドニー国際空港 航空フォト | by JA8166さん 撮影2024年07月12日'. Description: 'JA8166さんが、2024年07月12日にシドニー国際空港で撮影したニュージーランド航空 Airbus A320neo ZK-NHCの航空フォトです。' Date: '5日前'.
- Entry 2:** Title: 'ニュージーランド航空 Boeing 777-300 ZK-OKR シドニー国際空港 航空フォト | by JA8166さん 撮影2024年07月13日'. Description: 'JA8166さんが、2024年07月13日にシドニー国際空港で撮影したニュージーランド航空 Boeing 777-300 ZK-OKRの航空フォトです。' Date: '2週間前'.
- Entry 3:** Title: 'ニュージーランド航空 Boeing 787-9 (ZK-NZL) 航空フォト'. Description: 'Boeing 777-9さんが、2024年07月05日にシドニー国際空港で撮影した...' (partially cut off). Date: '2週間前'.

?1?Google????????????????????2024?8?24??

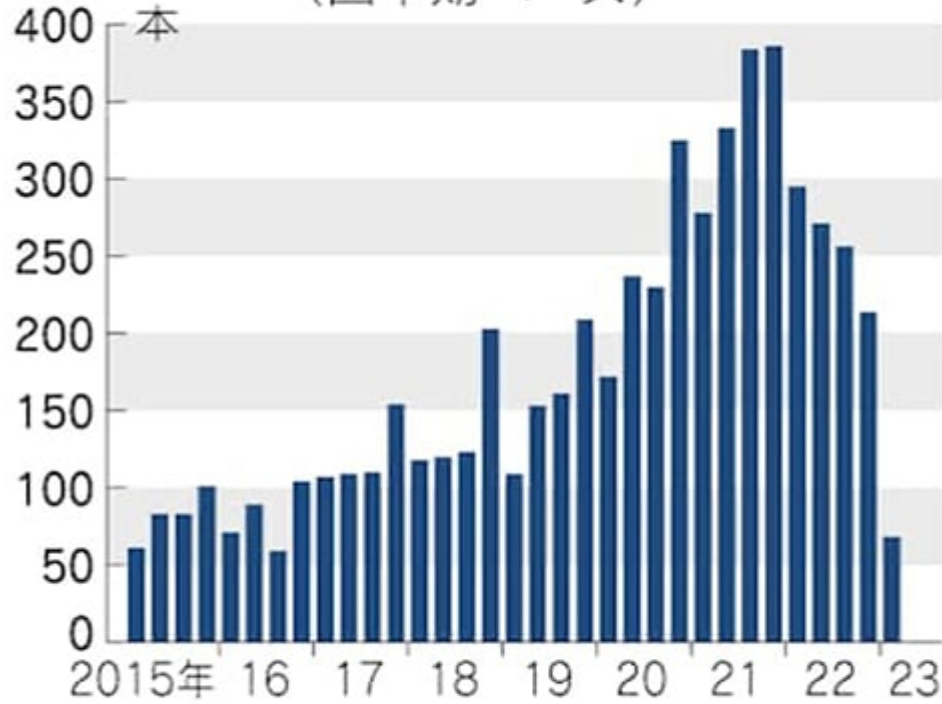
????????????????ESG??

2023??ESG??????????

????ESG???

ESG????????2????????3??2021????????????????????

ESG投信の設定本数は急減 (四半期ベース)



(注)モーニングスター・ダイレクトで追加型投信とETFを集計。類似投信のうち運用期間が最も長いものが対象。償還済みも含む

??ESG???????

???2023?3?20???????

4?????ESG?????S&P500???

??FACTSET

ESG??4?????
10?????????????EV?????????????????EV??

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202X?XX?XX?

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??202X?XX??2050????????????????2030??2013??47%????????????????CO2????????
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??6????????????????2030?46%????????
??CO2????????PPA??

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????????2030??CO2??46%????????????????6%????????????????6??
????????????????46%????????????

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??1????????????????????
????????????????CO2????????????????CO2????????
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????????2022?11????????27????COP27????????CO2??
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????EU??2023?9????UCPD????CRD????2026????????
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????????2050????????2030?47%????????2030??205
0????????CO2????????

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

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??BWR??

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

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??1.85
?=1/0.54??

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2. MAAP????????????????

??MAAP?Modular Accident
Analysis Program????????????

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?? ?? · Thursday, August 22nd, 2024

????????????????9?10????????????????????????????????????42%????????????
??37%??

??New York
Times????????????????5??



Darwel/iStock

1. ????????

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2. ????????

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EV??

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????2020?10????????????2050????????????????????????2035????????????EV????????????EV?????????
?????550????????????????????CO₂????????????????????EV????????????10????????????????
????????????CO₂????????????EV????????????

3. ??????

?????2022????????????IRA????????????????????????????????????10??3700????????????????
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EV??

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4. ??????

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4????????????????????1300????????????????????

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5. ????????

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EU

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180

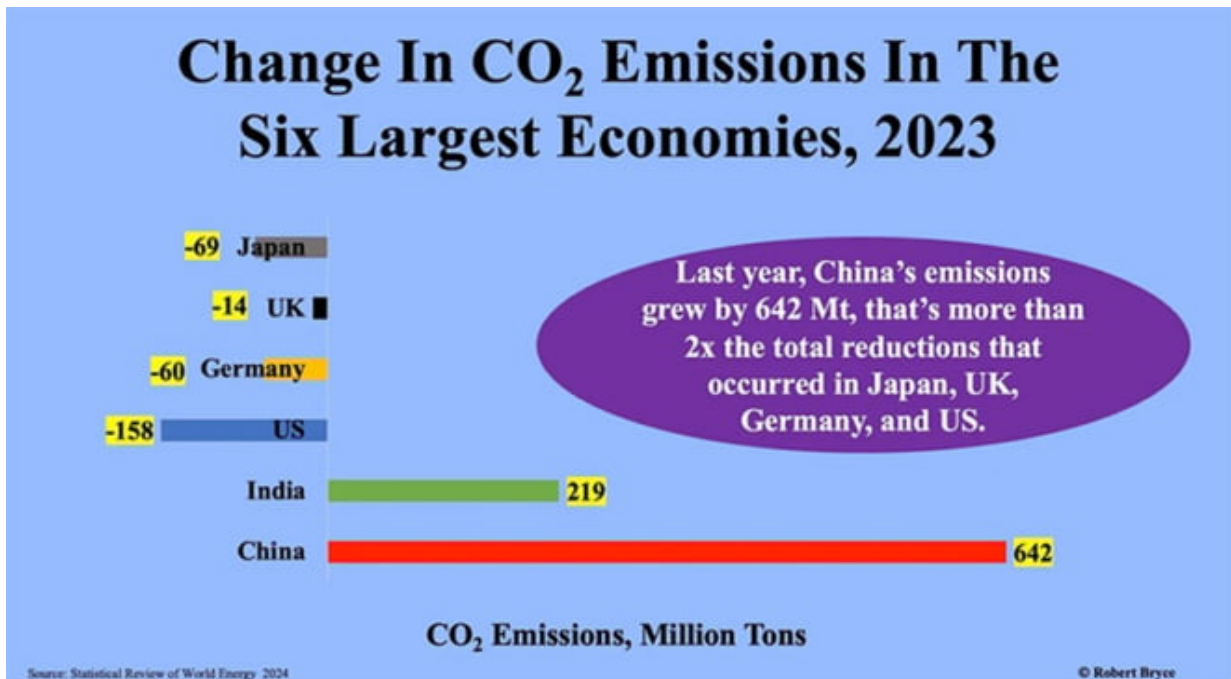
DE&I?LGBTQ?SDGs?Net Zero

EU

EU

EU 2050 GX CO₂

CO₂



20 GX 23.4 2023 GX 9.5

