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

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?? ? · Sunday, November 3rd, 2024



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<https://agora-web.jp/archives/240806054159.html>

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ChrisSteer/iStock

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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

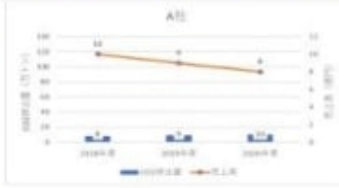
??ESG?SDGs??????

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？

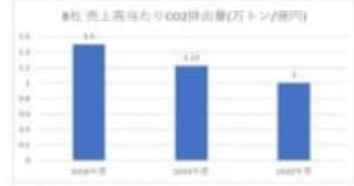
| 年度 | CO ₂ 排出量 | 売上高 |
|--------|---------------------|------|
| 2018年度 | 8万トン | 10億円 |
| 2019年度 | 9万トン | 9億円 |
| 2020年度 | 10万トン | 8億円 |

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。

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Street?Vanguard?ISS?Glass Lewis????????????????????????

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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/siclust1uh0wq1>



出典：2023年10月24日付ロイター
<https://jp.reuters.com/markets/japan/funds/SAPAH37UZ3PTNIZ37MLZK8GQ: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/>



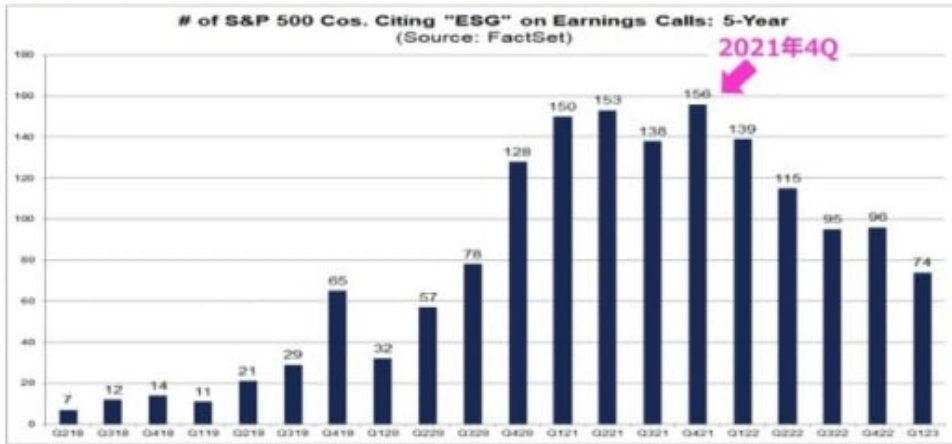
出典：2023年11月29日付日本経済新聞
<https://www.nikkei.com/article/DGXZQOUB2843V0Y3A121C2000000/>

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

ESGブームの終焉

8/19

決算説明会で「ESG」という言葉を用いたS&P500企業の数



出典：FACTSET
<https://insight.factset.com/lowest-number-of-sp-500-companies-citing-esg-on-earnings-calls-since-q2-2020>

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

ESG???2021????????2022????????????????????2021??
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Posted in ????????????, ???, ??? | No Comments »

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

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

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?? ?? · Tuesday, October 15th, 2024



trendobjects/iStock

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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

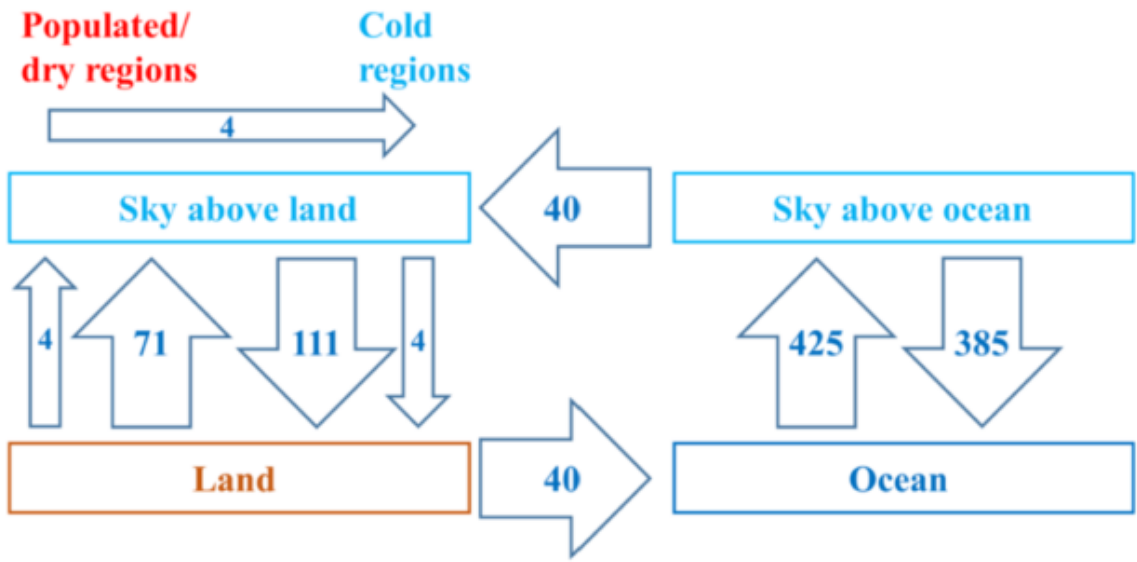
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?? ?? · Friday, October 11th, 2024



da-kuk/iStock

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

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GEPR??? · Friday, October 11th, 2024



eyegelb/iStock

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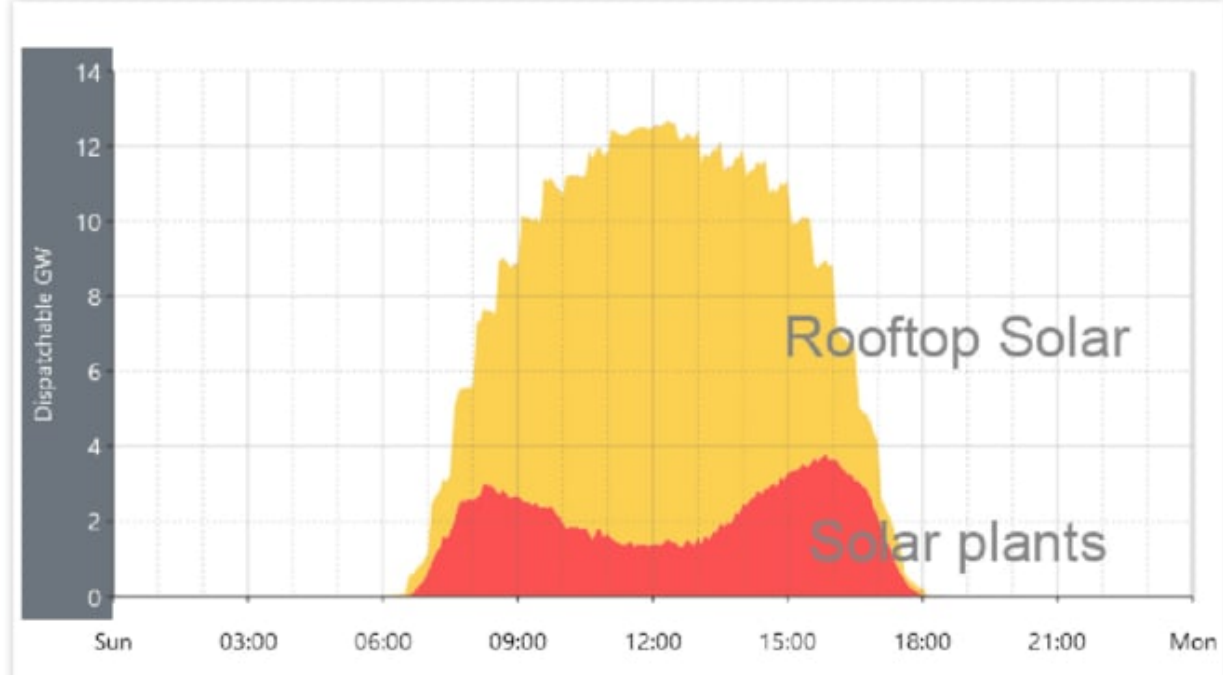
Quarterly Energy Dynamics Q3 2023 AEMO Australian Energy Market Operator

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

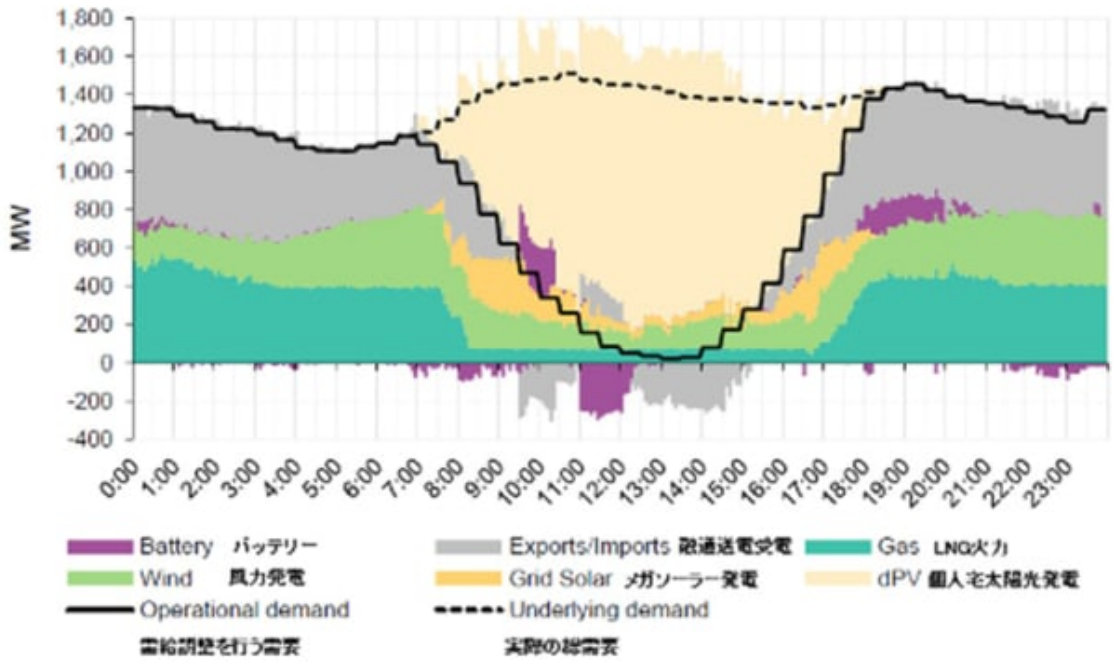


2024 9 1 JoNova

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=

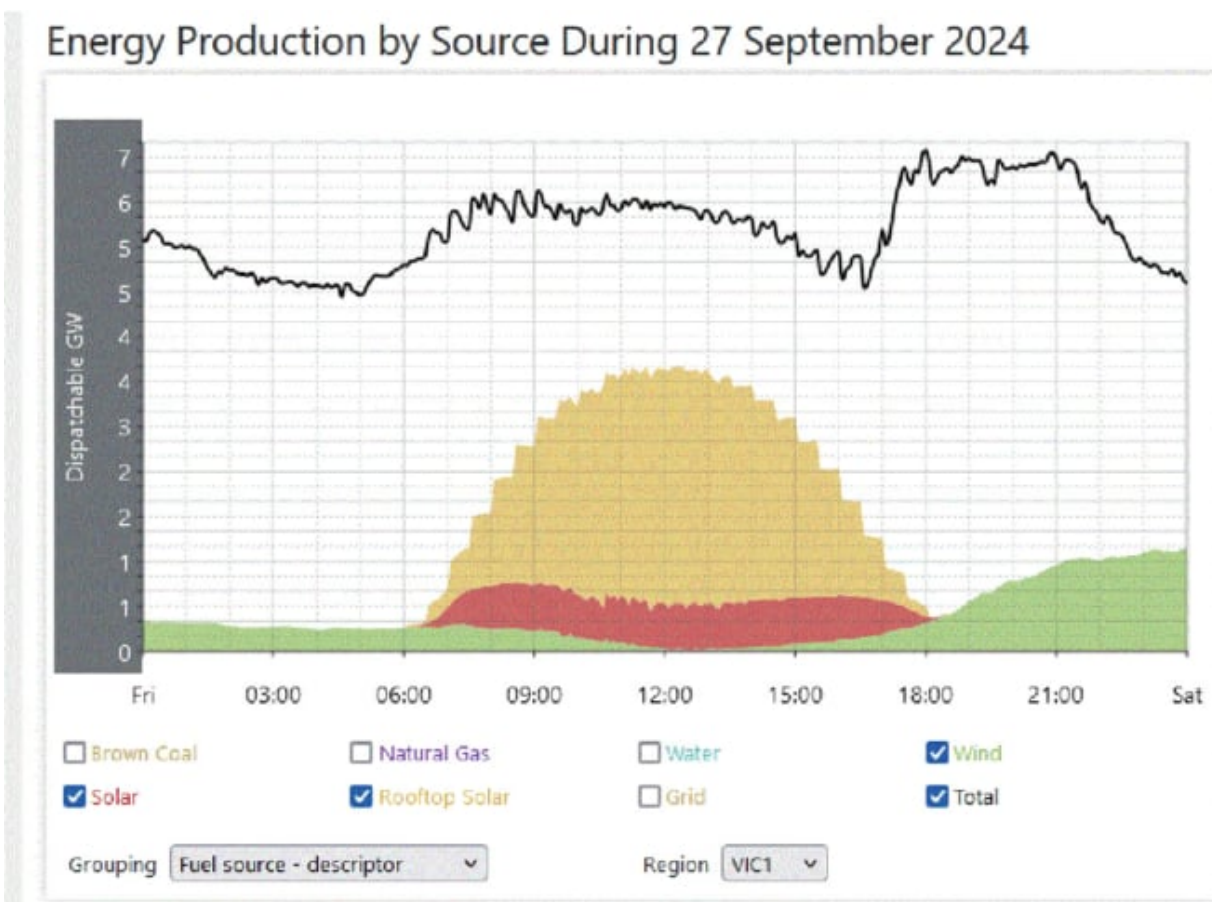
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2024927????????????????????????????????????

Australian grid risks an overload at lunchtime as solar power floods the system



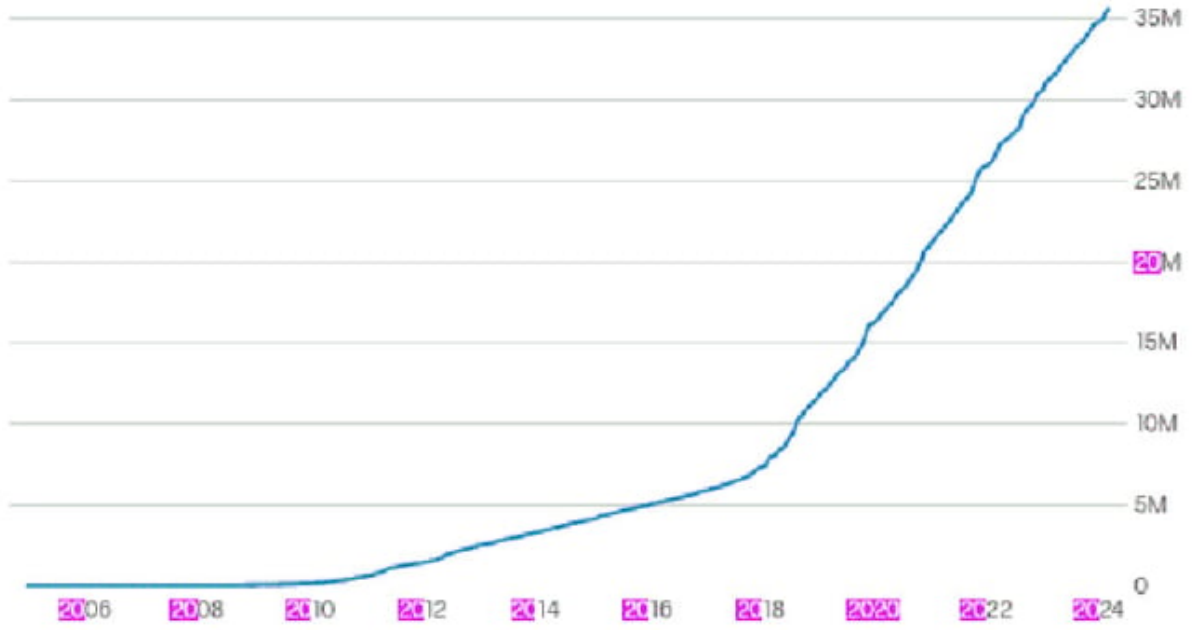
4?2024927????????????????????????????????????

JoNova?????????

4927????????????????????????????????????2??

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Cumulative installed rooftop solar capacity (kW)



Source: Australian PV Institute / [Get the data](#)

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?? ?? · Monday, October 7th, 2024

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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**

Below these are three bullet points:

- 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

On the right side of the slide is a photograph of 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

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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 »

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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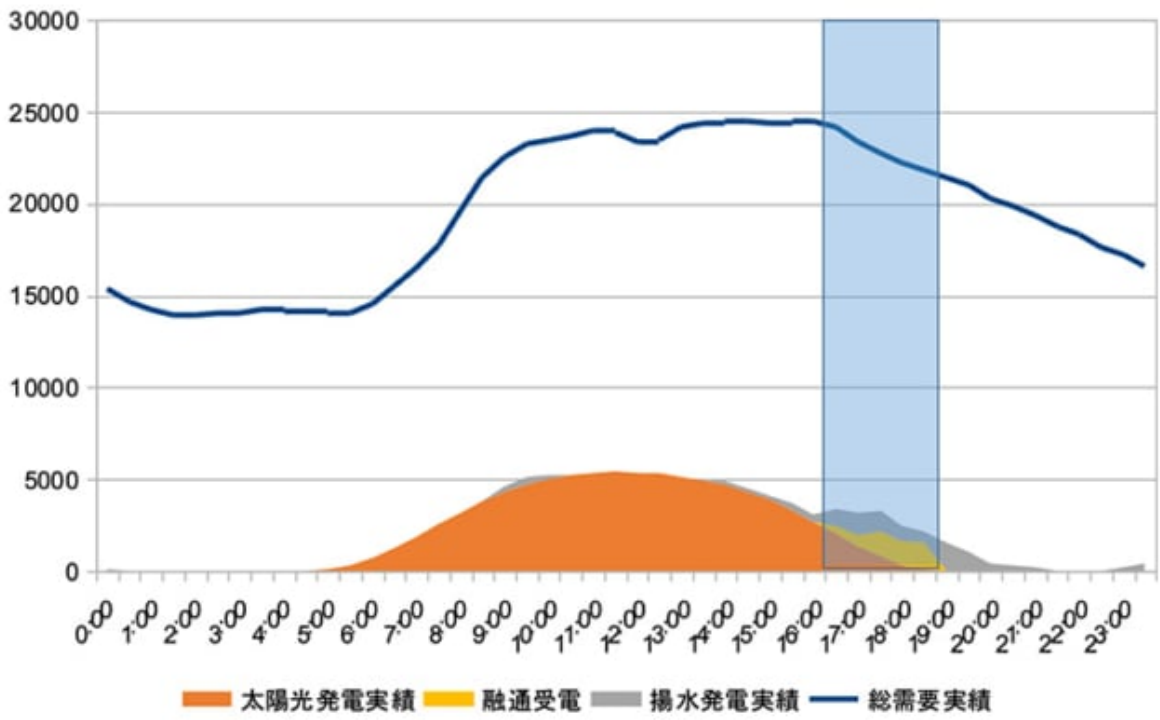
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20240705 関西電力総需要と太陽光発電実績



20240705

16:30-18:00

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

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



HUNG CHIN LIU/iStock

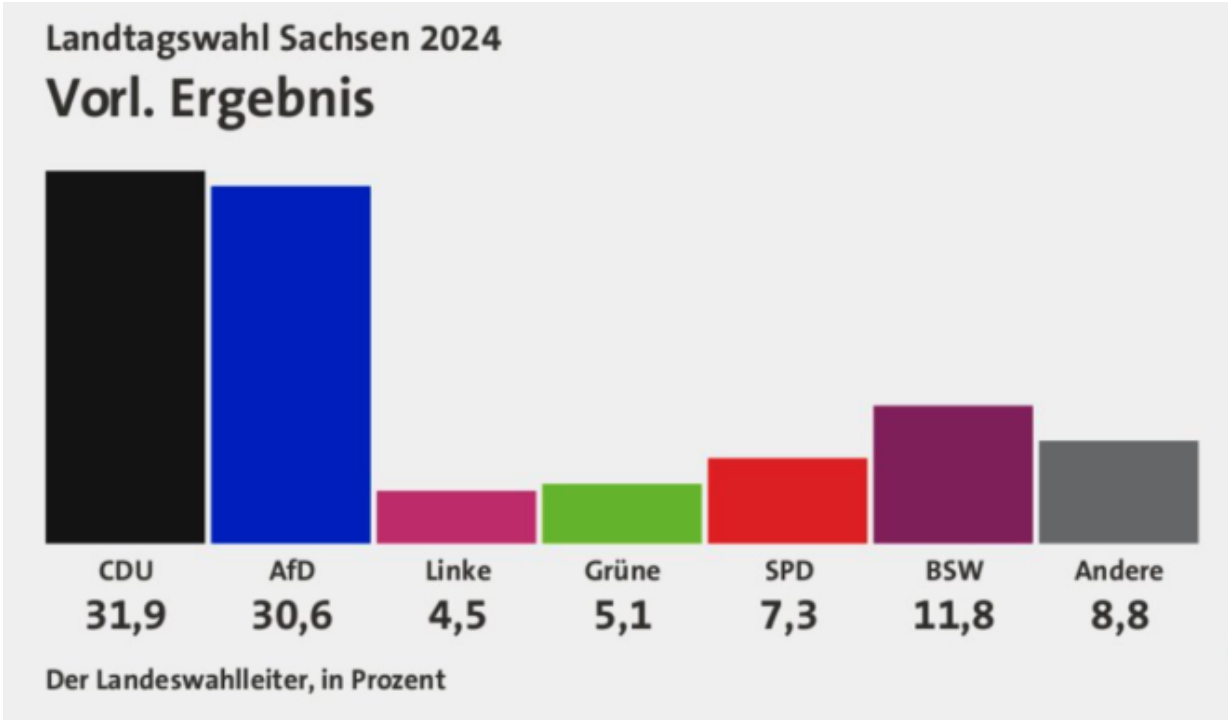
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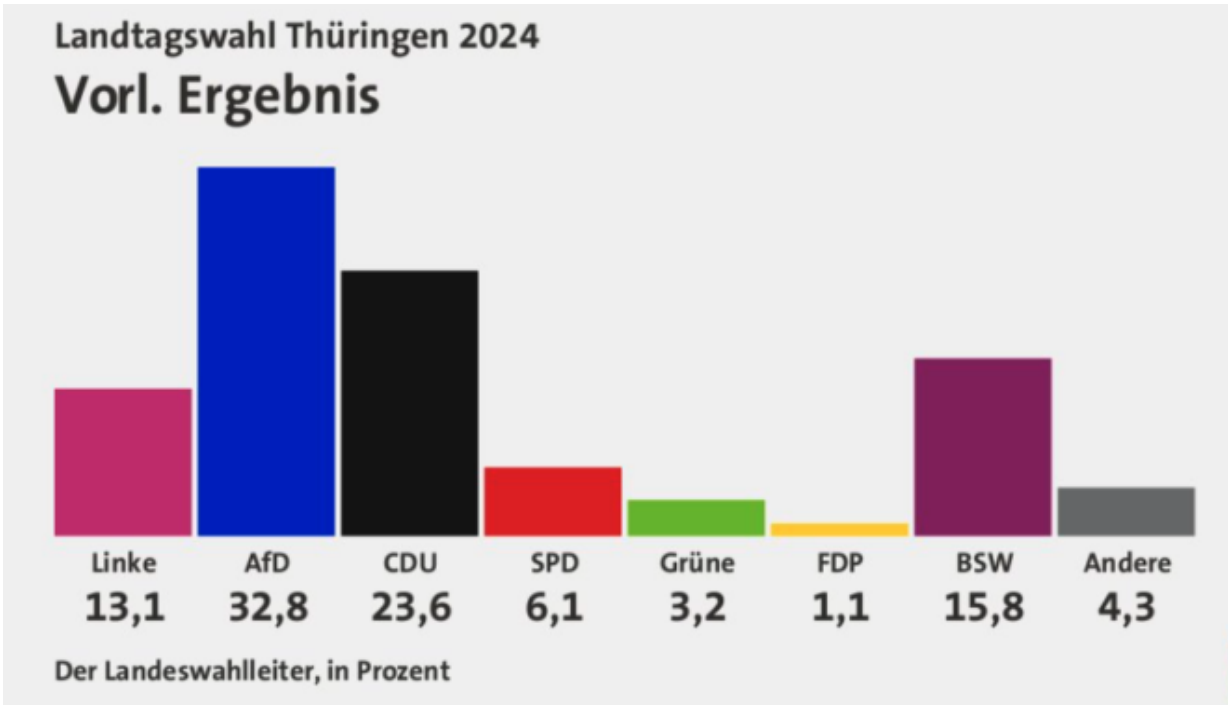
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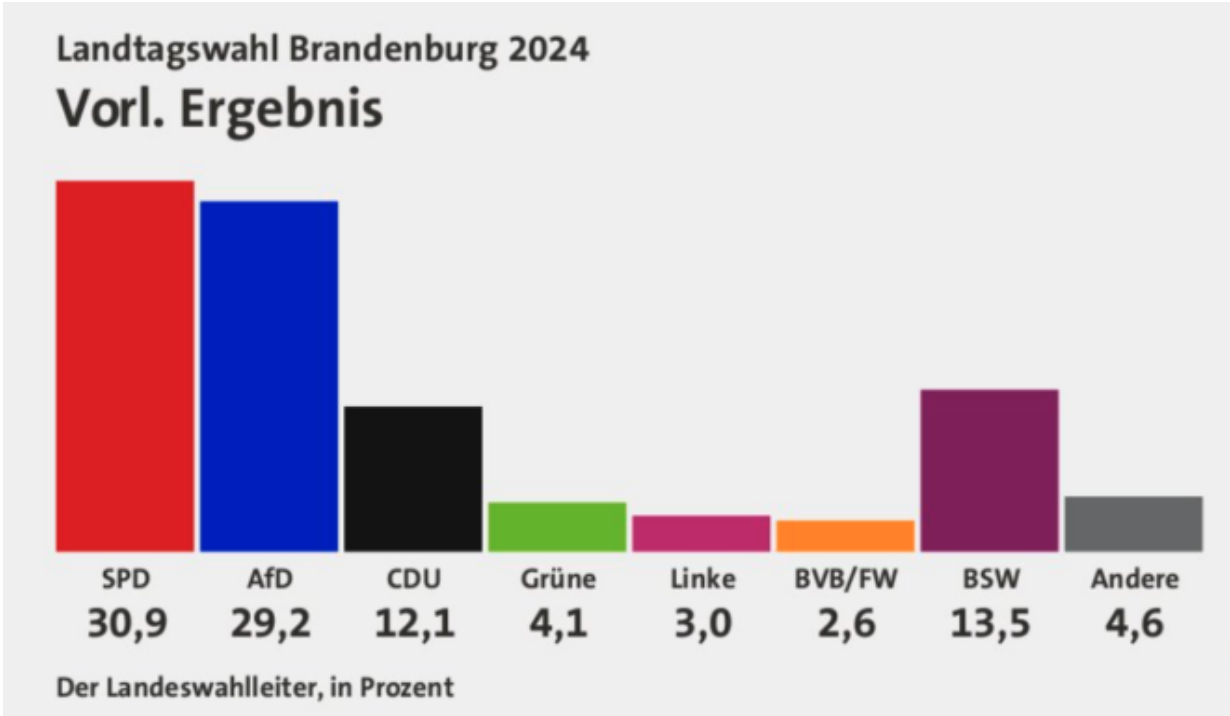
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SPD=???AfD=???????????CDU=???????????Grüne?????Linke=???BSW=?????????????????
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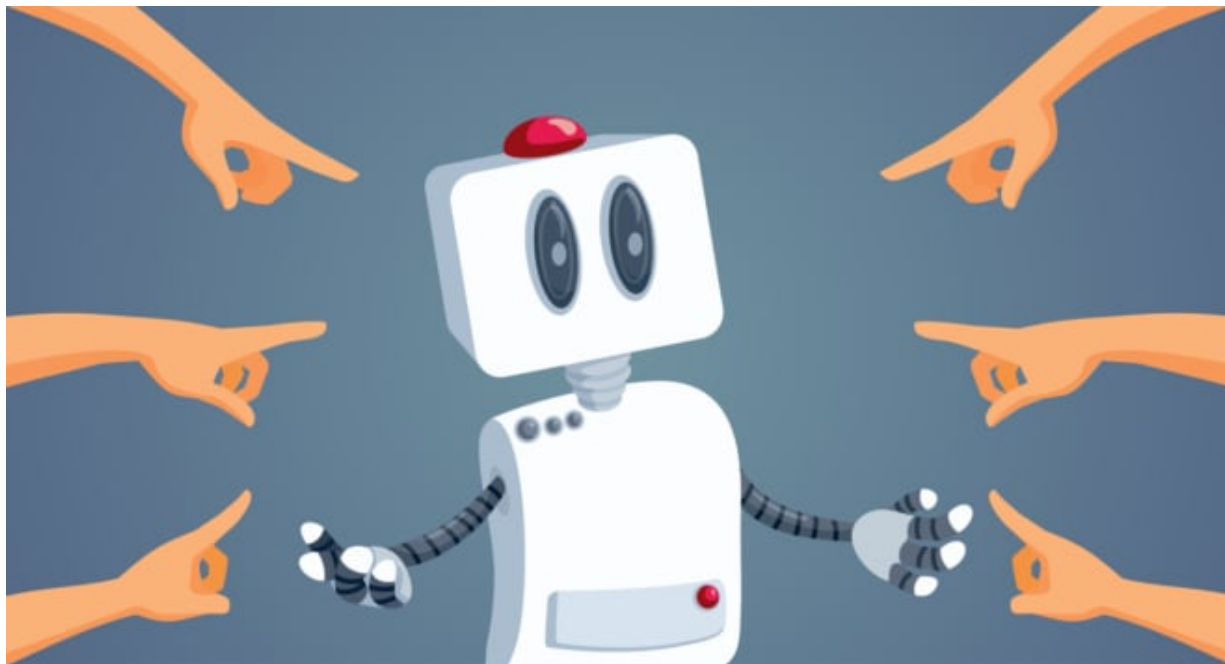
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Posted in ???, ?? | No Comments »

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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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Posted in ???, ????? | No Comments »

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?? ?? · Tuesday, September 24th, 2024



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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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??23??24????????????????????????????????????650????240????67??410????????????????
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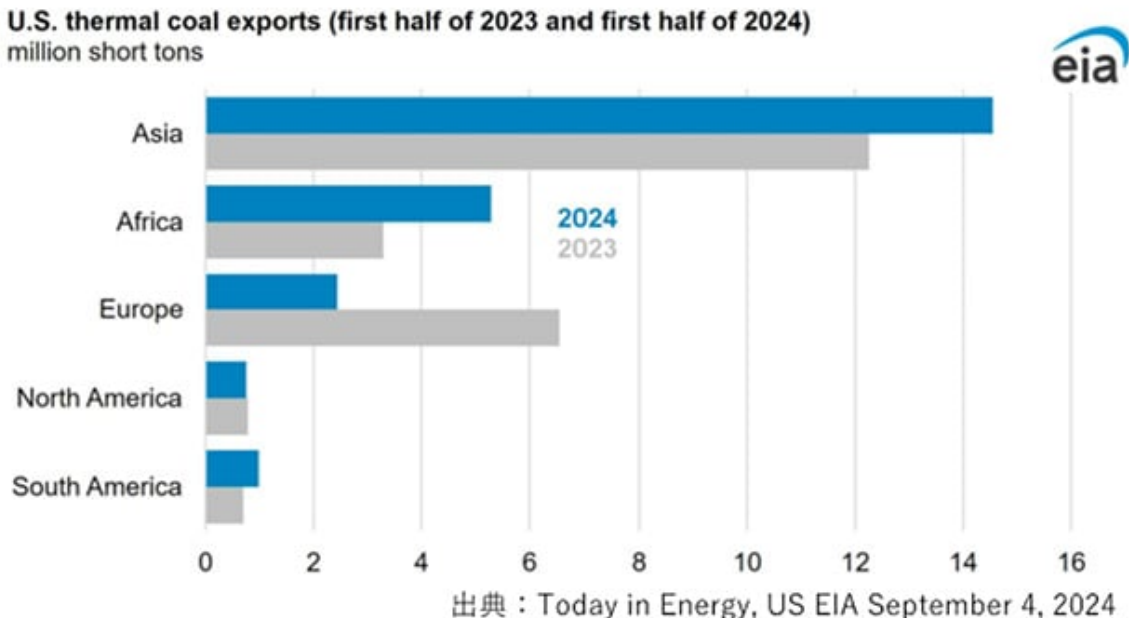


図 米国の燃料炭地域別輸出量（23年・24年上半期）単位百万ST

??EU????????COP28?G7?G20
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 ?????????????????COP????????????COP????????²²?COP27????????????COP22?COP7?
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????????????????9?3??EIA????????????????³³????????????????????????????LNG?
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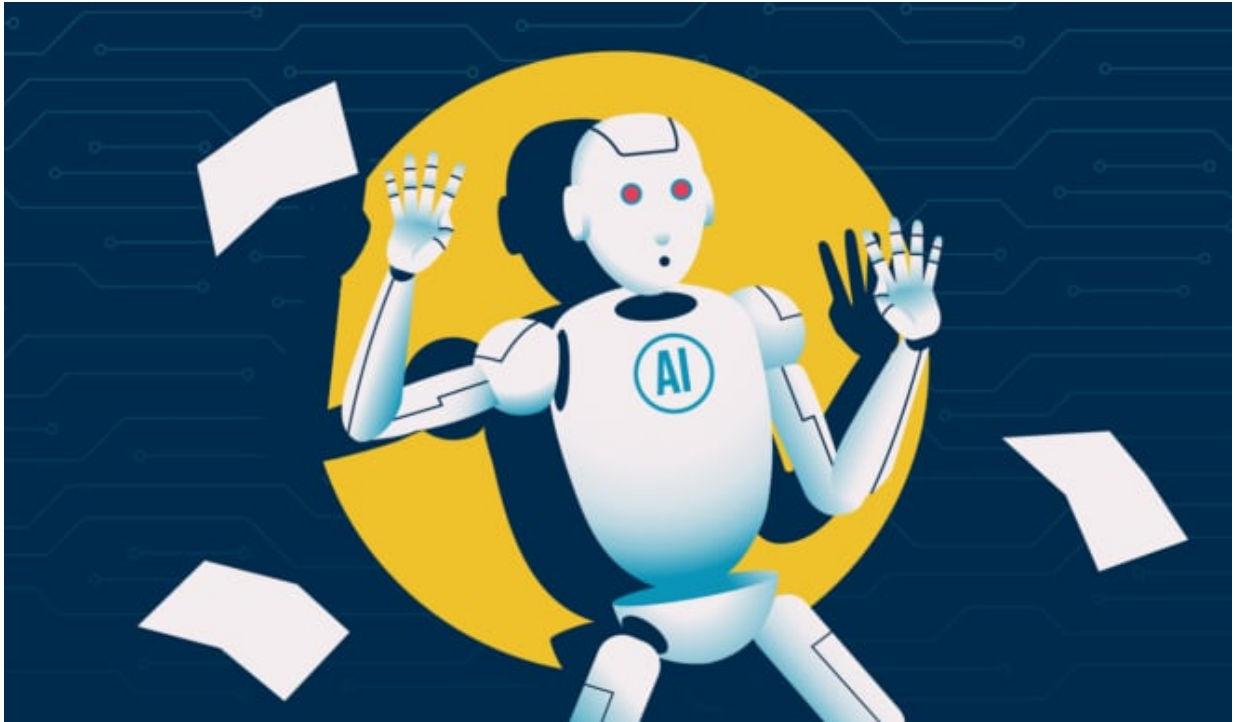
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?1?U.S. thermal coal exports to Asia and Africa surge as shipments to Europe fall
?2??????COP??
?3?North America’s LNG export capacity is on track to more than double by 2028

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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2. 2035?????13????75%????????????????????????????????????
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?SDGs?????????

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

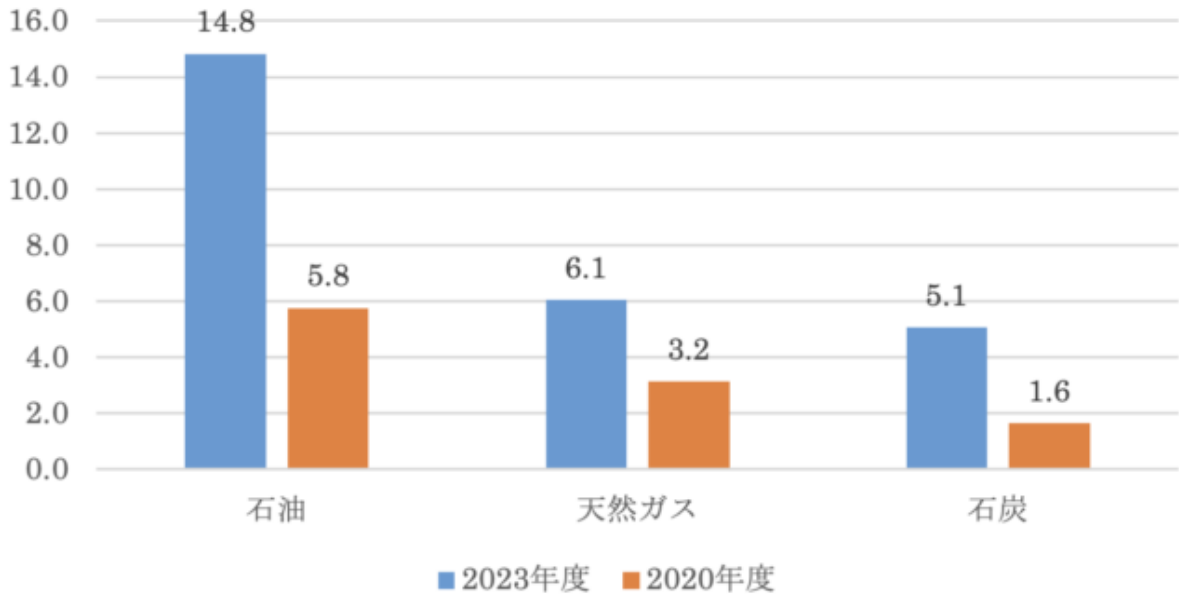
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?? ?? · Tuesday, September 17th, 2024



a-poselenov/iStock

化石燃料輸入金額（兆円）



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

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?? ?? · Friday, September 13th, 2024



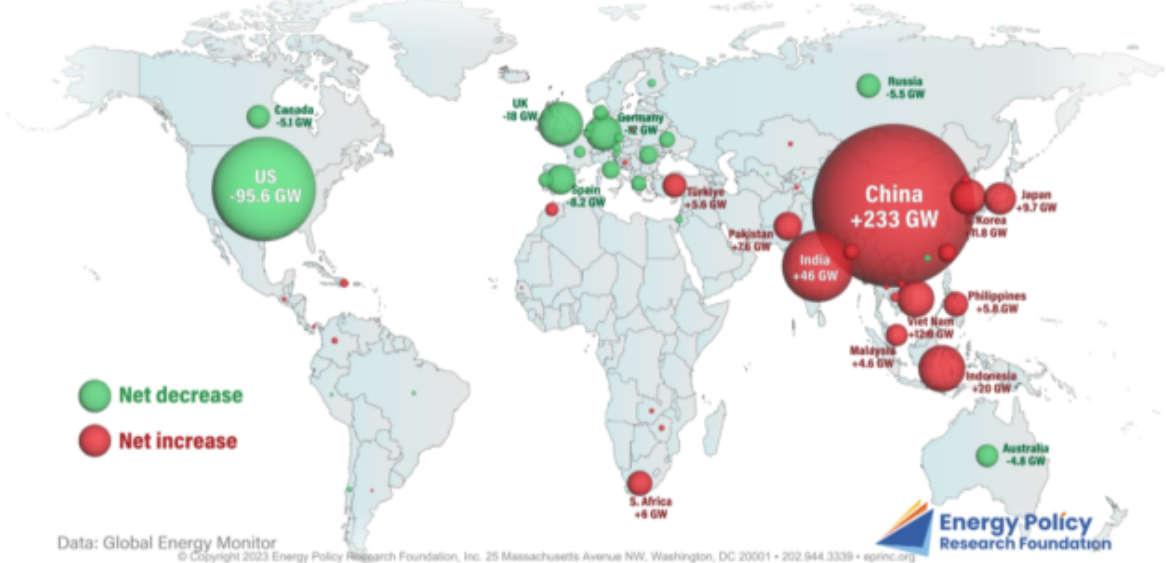
Andrzej Rostek/iStock

??2015????????2023??GW??100??????????????????
1????????

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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 »

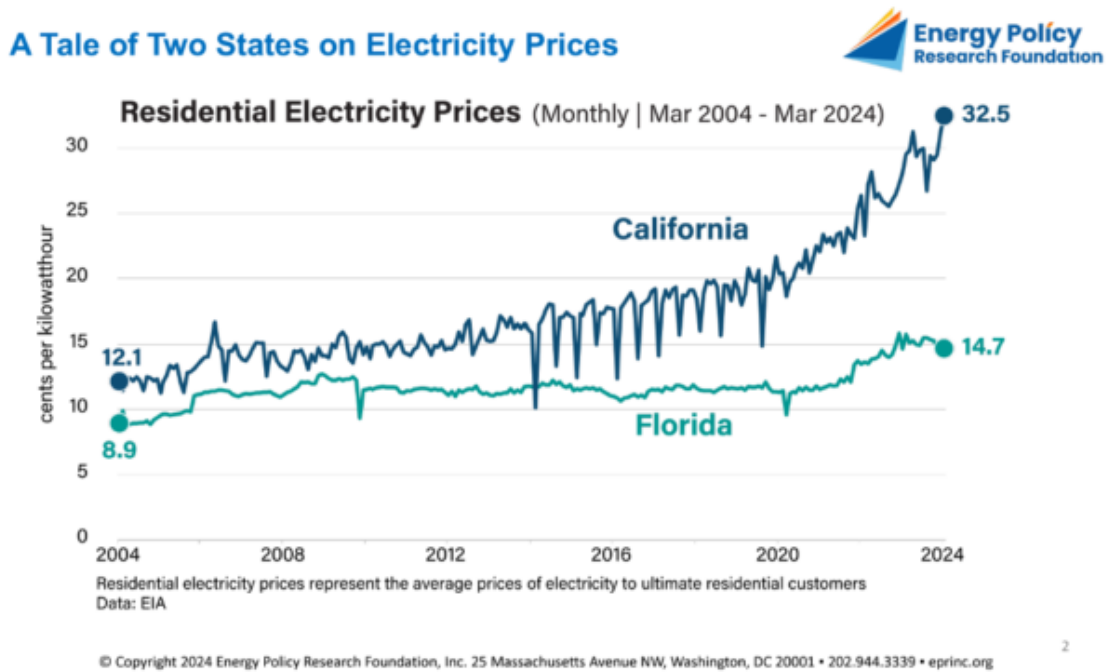
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?? ?? · Thursday, September 12th, 2024



kasezo/iStock

??EIA????????????????????????????????20????
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CO2????????????????????????????????

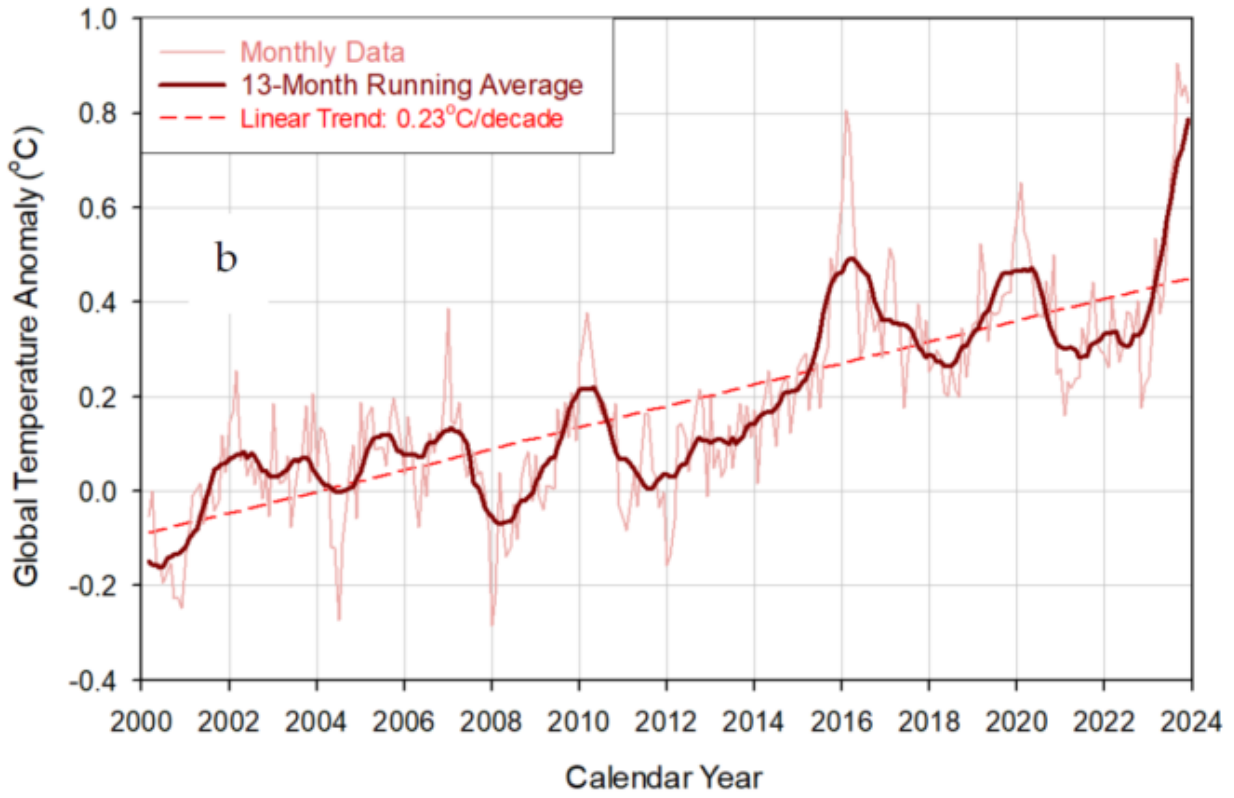
?? ?? · Friday, September 6th, 2024



35007/iStock

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

Hunga Tonga volcano: impact on record warming

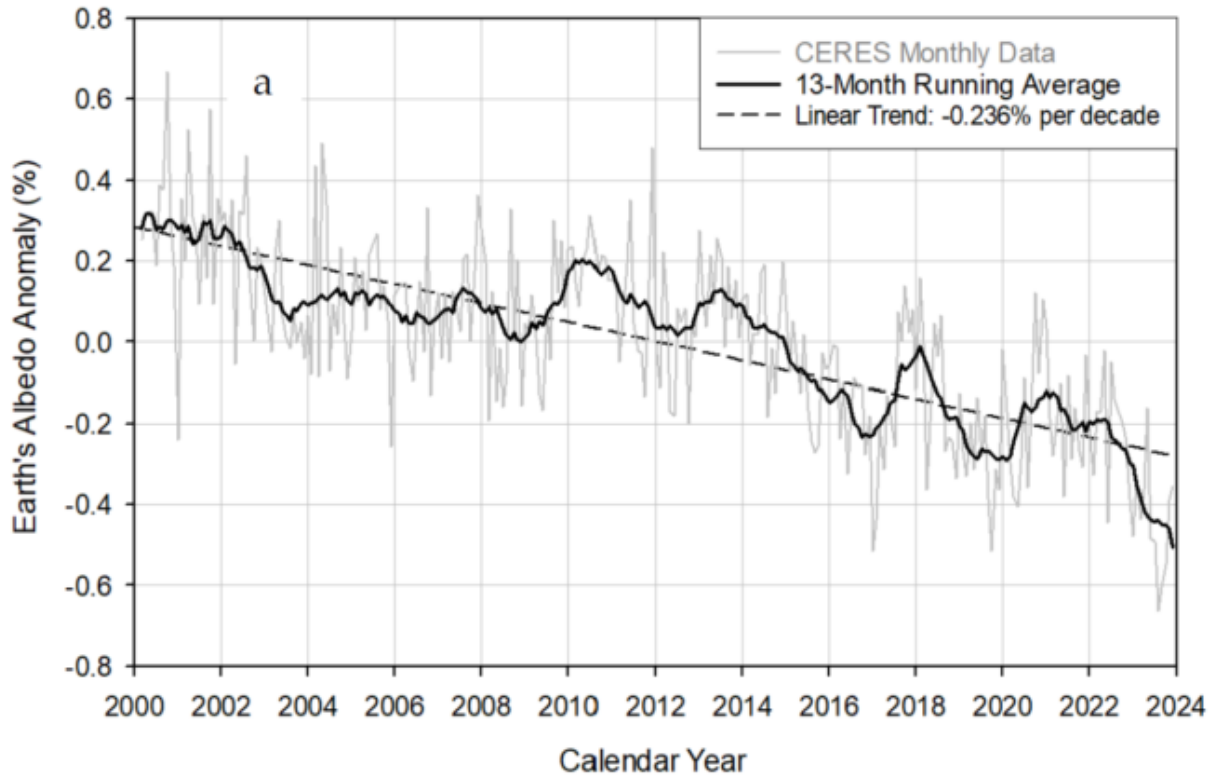


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Roles of Earth’s Albedo Variations and Top-of-the-Atmosphere Energy Imbalance in Recent Warming: New Insights from Satellite and Surface Observations

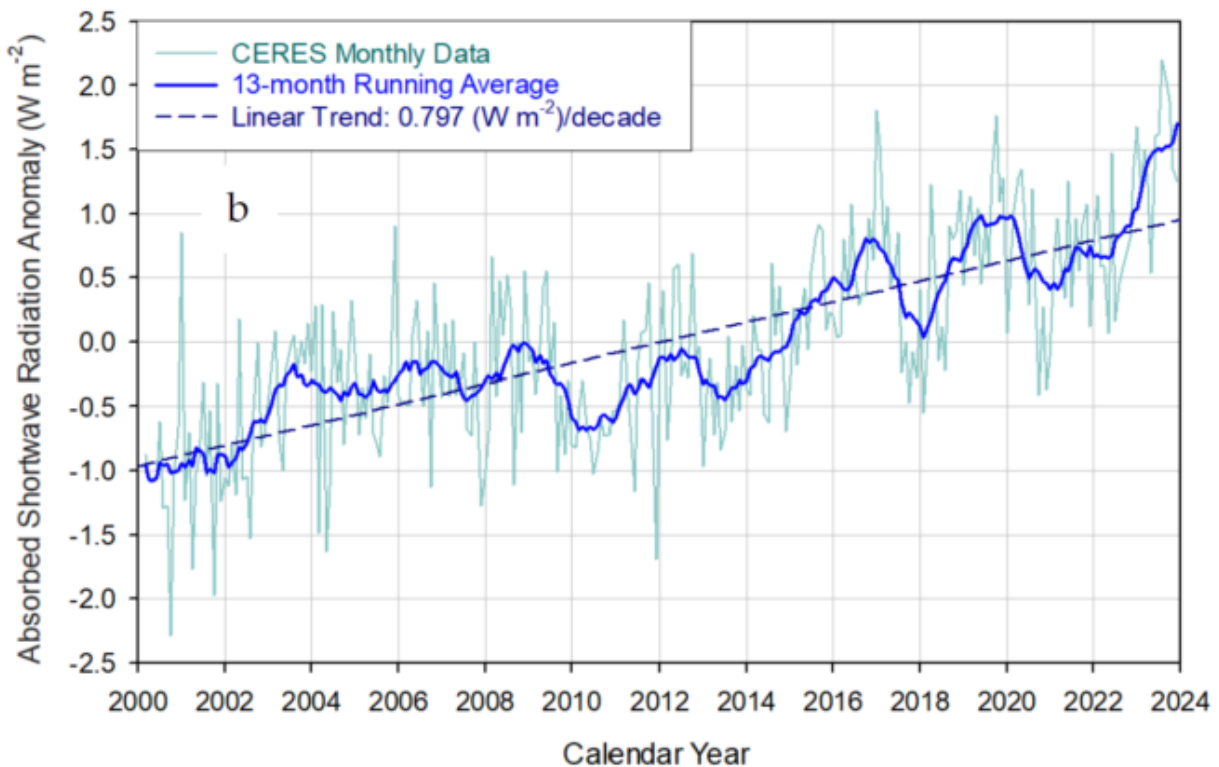
????????????????????2????????????????????????????????2000????0.79%??????????



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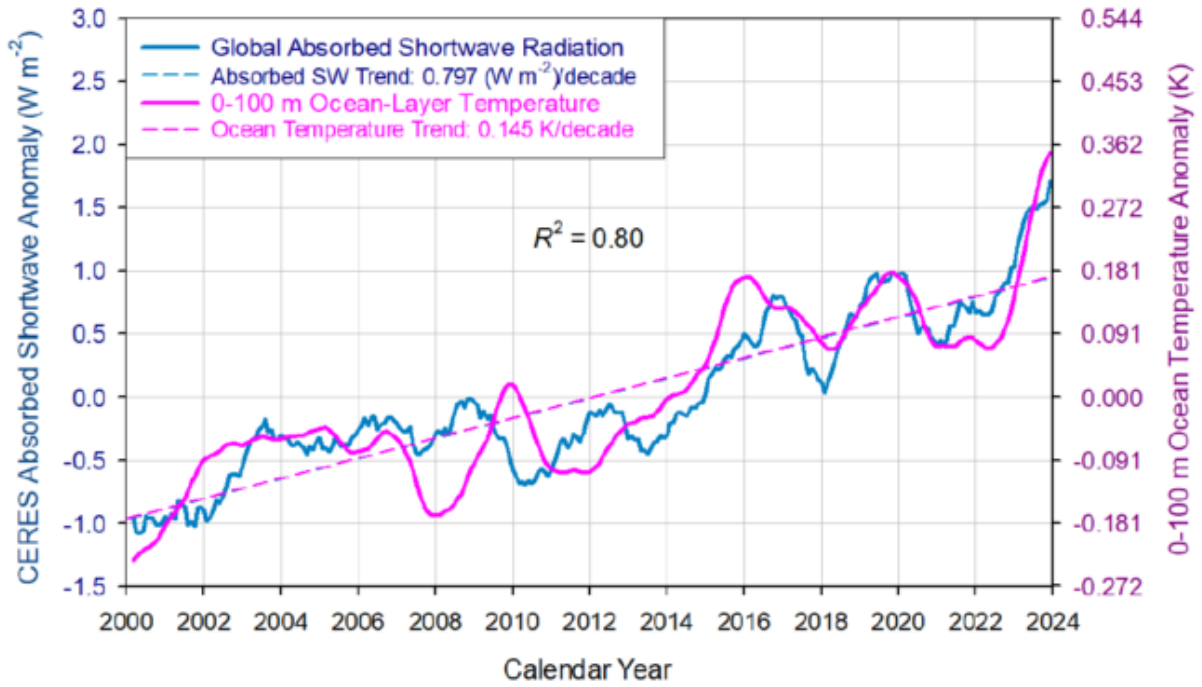
????????????????????2000?????1?????????2.7?????????3???????shortwave?????????????????????????????1
ongwave????????????????????????



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IPCC?6?????1750???2019?????????????????????2.72?????????????????2000?????????????????
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??5?????????????CO2????????????????????
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?5????????2024????????????????????

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

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Fuel CO2 CH4 FT

SAF A

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

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??61????????????63????10????
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??COP28??AZEC????????????????
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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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Posted in ??????????, ??? | [No Comments »](#)

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?? ?? · Monday, September 2nd, 2024



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<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・党員支持 | 世論・党員支持 | 世論・党員支持 | 世論・党員支持 |

©????NEWS

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