欧美ESG内容传播热点：过去、现在与未来

李佳 | 华尔街日报商务合作中国区总监

本文所涉及的趋势观察及建议围绕欧美展开

ESG相关传播主题词变化趋势

1 品牌故事中“Sustainability"取代"ESG"

我们在新闻报道中发现一个明显的趋势，即品牌在讲述自己的故事时,更倾向于使用“可持续性”而非“ESG"这个词。在上市公司的财报发布中，2023年"可持续性"的使用率上升了1%,而"ESG"或“environmental social and governance"的使用率则下降了10%。

2 品牌仍需确保其讲述的 ESG 故事，能清晰传达公司在这一方面的具体行动。我们看到了以下趋势：

2023年相比2022年: - "ESG"或"环境社会治理environmental social and government"的使用率下降7% - "碳中和carbon neutral"的使用率下降18% - "循环经济circular economy"的使用率下降5% VS. "可持续性sustainability"的使用率上升11% - "影响报告impact report"的使用率上升37% - "绿色计算green computing"的使用率上升25%

高管们转向使用“负责任的企业”等替代来描述企业的ESG举措

经过多年对环境、社会和治理工作的投资者强烈反对、政治压力和法律威胁，许多商界领袖现在有意识地避免使用曾经广泛使用的此类举措的缩写。在财报电话会议上，许多首席执行官现在采用了新的方法。一些公司，包括可口可乐，正在重塑公司报告和委员会的品牌，将 ESG 从标题中剥离。顾问们正在指导高管们以其他方式描述他们的努力，提出“负责任的企业（Responsible Business）"等新术语……

与此同时，在华尔街，随着兴趣的消退，一些公司正在关闭曾经流行的 ESG 基金。领导者正在做出的一些微妙的改变。可口可乐公司于2022年发布了《商业与ESG》报告； 2023年，发布了《商业与可持续发展》报告。我们看到首席执行官们在 ESG 领域进行了大量的重构和调整。不仅包括他们所说的内容，还包括他们所说的地点以及他们描述这些内容的具体方式……

——摘录自华尔街日报2024年1月发布的相关报道

趋势变化背后的原因

围绕ESG话题，美国和欧洲都出现了质疑甚至反对的声音。

美国

- 认为ESG标准带有意识形态色彩，与公司利润最大化的传统目标存在冲突。
- 批评ESG缺乏透明度和统一标准，容易被滥用于达成某些政治目的。
- 担心ESG投资将损害企业竞争力和就业。
- 部分州出台法律限制ESG在州投资和采购中的应用。

欧洲

- 更多关注ESG标准本身是否真正有助于实现气候和可持续发展目标，对现有框架的有效性提出质疑。
- 批评部分ESG标准过于简单，存在"漂绿"等问题。
- 对ESG导致投资回报下降、加剧通胀等经济影响表示担忧。
- 一些欧洲公司认为ESG标准给企业施加了过多规范负担。

绿色产品成为主流消费品

目前全球消费者购买绿色产品的比例表明，在经济不确定的情况下，绿色产品的需求基础十分稳固。绿色产品的需求并非来自年轻、富裕的气候活动人士这一小众群体，而是来自主流受众……随着绿色消费成为主流，消费者对可持续产品的期望在越来越多的产品类别中开始成熟……消费者也表示愿意平均支付 27% 的溢价，以奖励那些兑现可持续发展承诺的创新品牌……

消费者不仅仅关心产品是由什么制成的。许多人还关注它们是如何制造的以及在哪里制造的。生产中使用的能源或资源（44%）和生产地点（39%）等因素排名相对较高。许多人还考虑包装（44%）、产品耐用性（41%），甚至考虑产品对环境影响的信息的可用性（19%）……对于许多消费者来说，绿色产品甚至已经从环保领域延伸到社会责任领域。四成消费者表示，他们认为以社会责任方式生产的产品是可持续的，例如，品牌雇佣多元化员工并支付公平工资……

——摘录自德勤2023年6月发布的《全球消费者状况追踪报告》相关分析文章。

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LG 2023

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Beyond Convenience

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Changing **the game**

During a panel at CES 2024, Roborock president Gang Quan painted a picture of AI as a defining force in tech, emphasizing its pervasive and transformative impact on households. In particular, smart vacuums present a key opportunity for progress and empowerment, helping people redirect the time and effort they spend on chores toward other pursuits. With a focus on devices and an interest in exploration, the industry is eying an intelligent future.

Gang Quan
president at Roborock

"The guiding philosophy at Roborock is to take the long view and do the right thing, which means resolving customers' problems and pain points. We believe short-term, quick profit is not our target—sustainable, long-term development driven by product innovation is our end goal."

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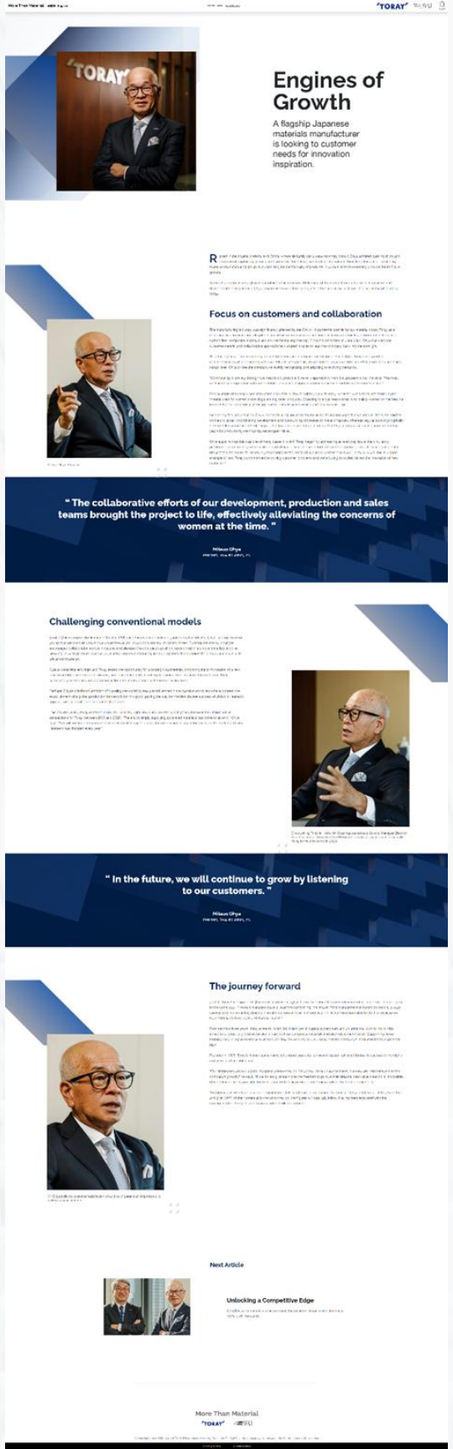

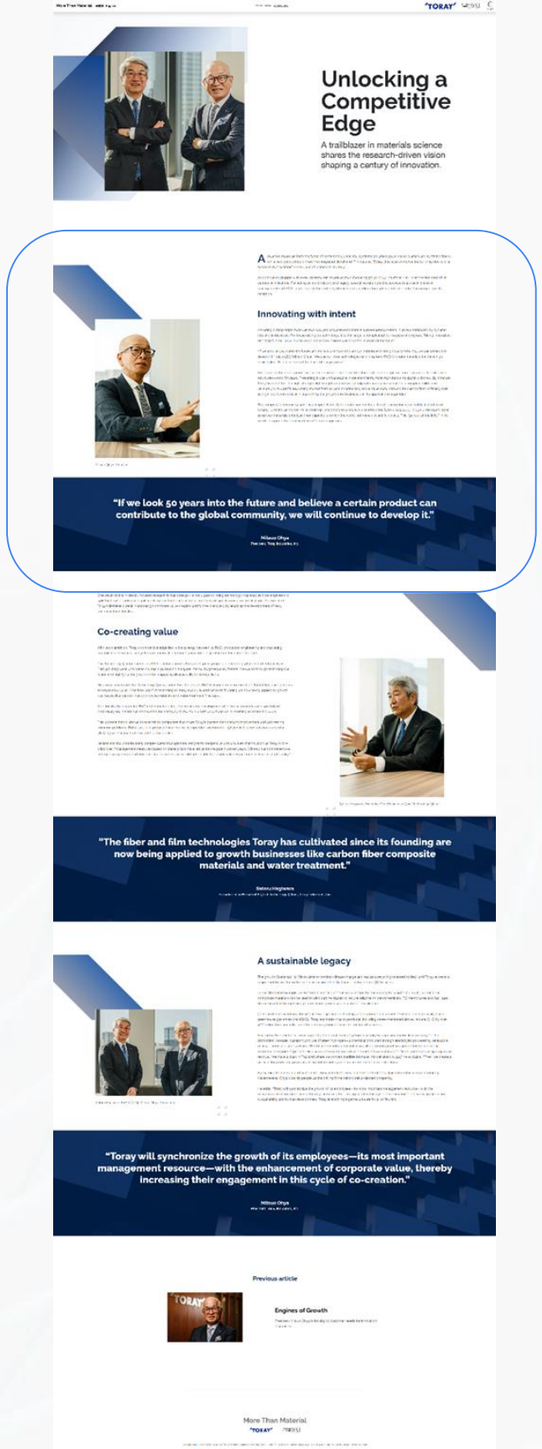

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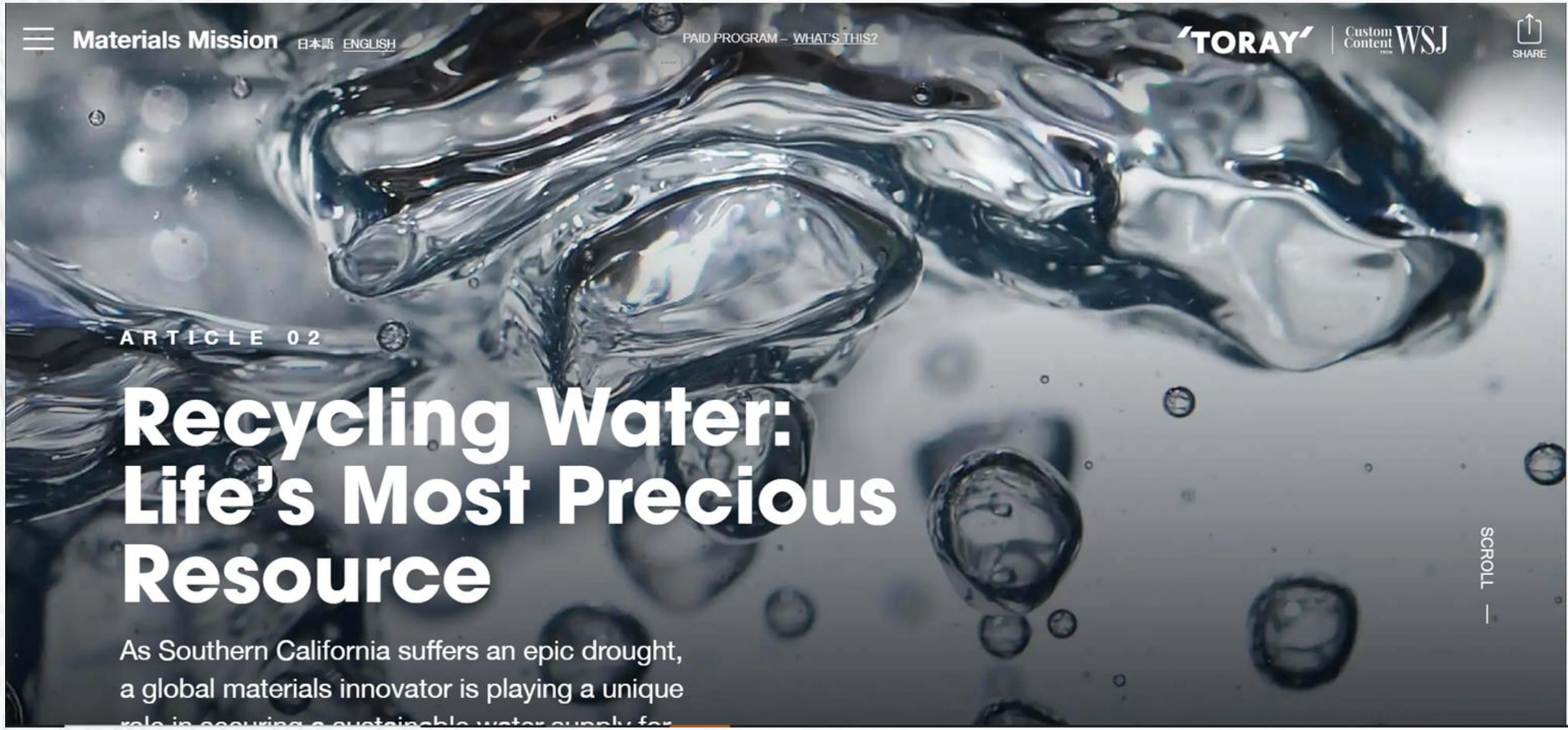

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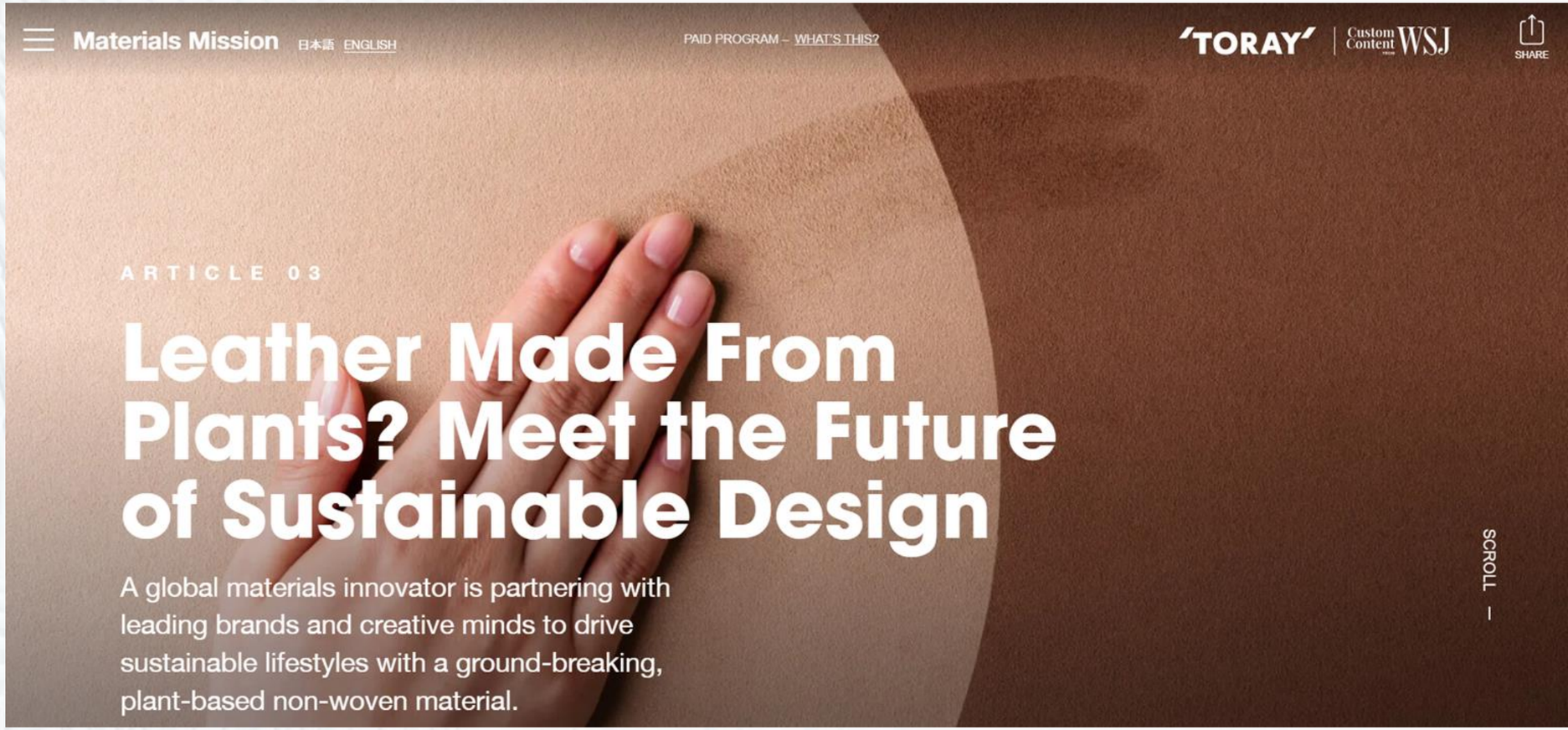

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FEATURED SPEAKERS

Yoshiyuki Miyamae

Designer,
A-POC ABLE ISSEY MIYAKE

Born in 1976. Joined the Miyake Design Studio in 2011 and worked as a member of the original team that started A-POC, which was led by Issey Miyake. Later, he joined the design team of ISSEY MIYAKE and became the designer of ISSEY MIYAKE from 2011 to 2019. For the new brand A-POC ABLE ISSEY MIYAKE started in 2021, he leads a team of experts to engage in further R&D for A-POC.

Sarah Gresty

BA Fashion course leader,
Central Saint Martins (CSM)

Started teaching at CSM in 1999 as a visiting tutor in BA Fashion Womenswear after a career in Paris working with Jean-Charles de Castelbajac, Azzedine Alaïa, Kenzo, Balenciaga, Chanel, Karl Lagerfeld and others. In 2006, became BA Fashion knit pathway leader at CSM while continuing a career as a knitwear designer for Cacharel, Versace, and other brands. In 2016, was appointed BA Fashion course leader at CSM.

Kazuma Oshima

Lexus planning division,
Lexus International

Joined Lexus International in 2014. After successive responsibilities in Lexus model pricing, product launch marketing, and concept car planning, he is now responsible for the RZ production model.

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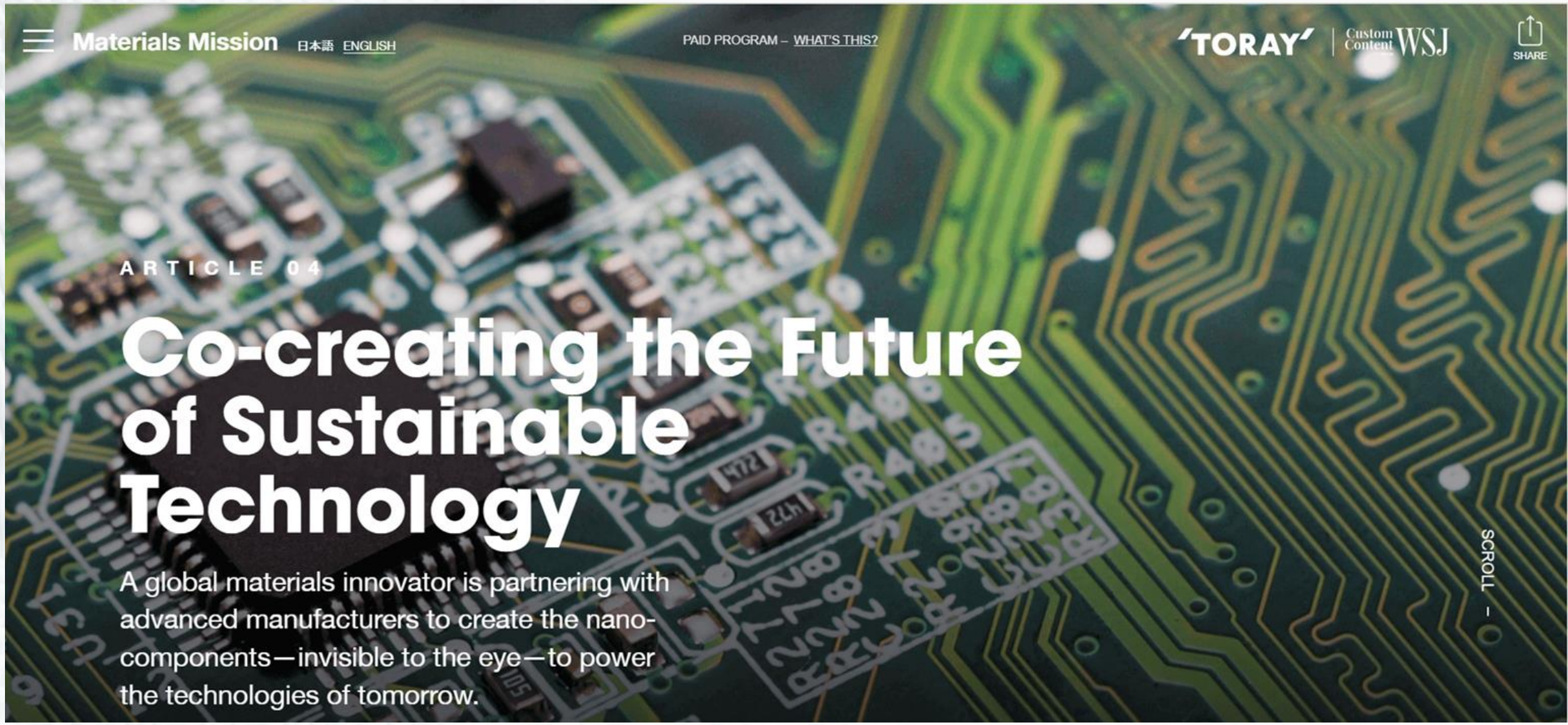

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TORAY 2024

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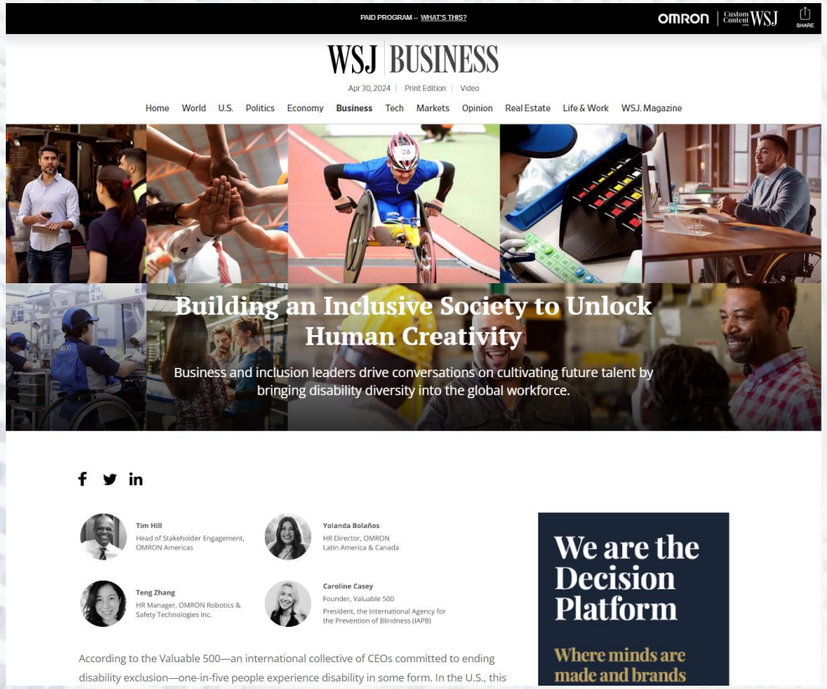
OMRON 2024



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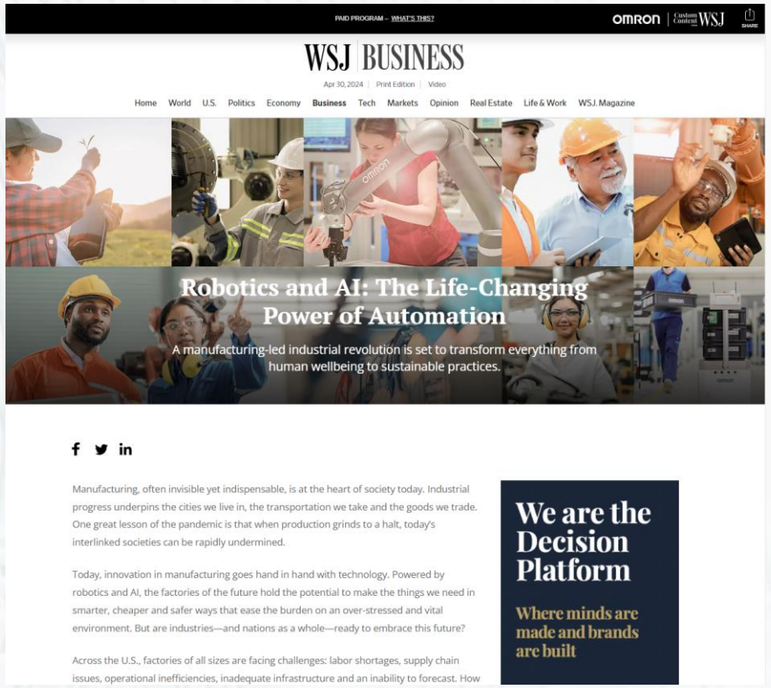

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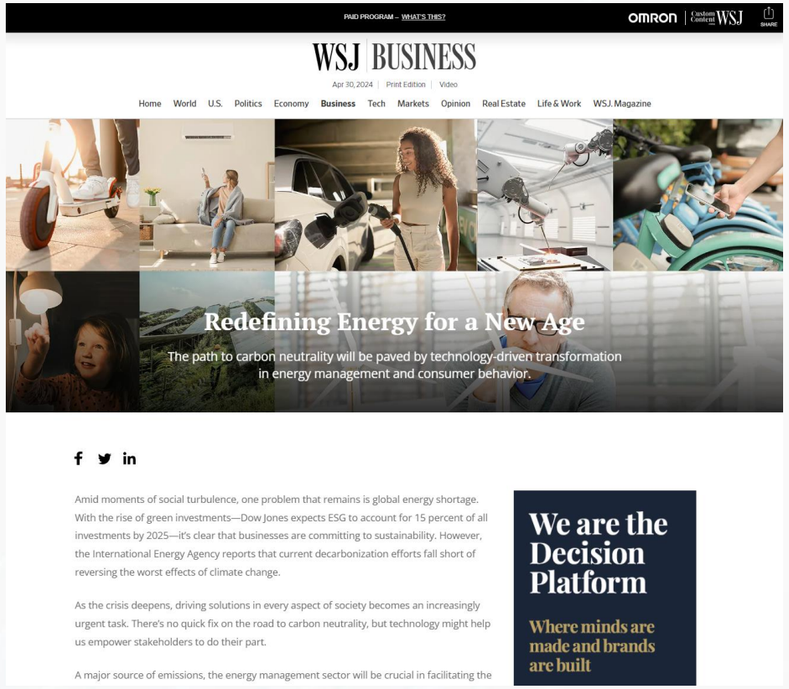

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MICROSOFT

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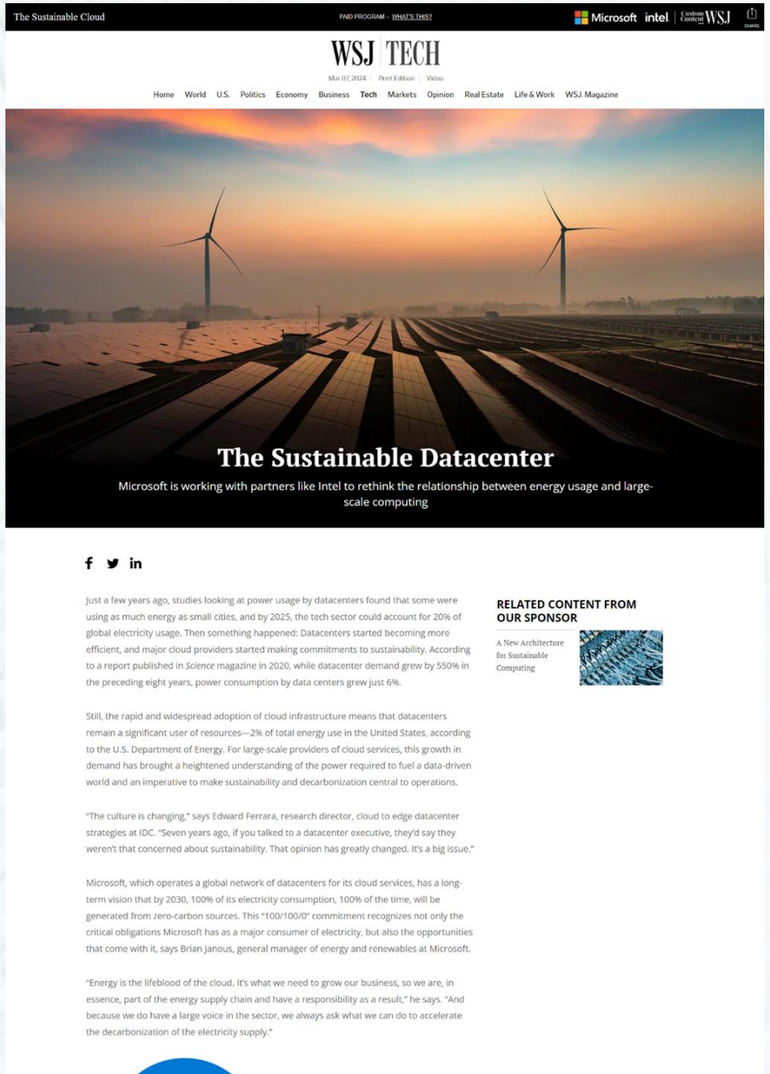

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The Sustainable Datacenter

Microsoft is working with partners like Intel to rethink the relationship between energy usage and large-scale computing

Just a few years ago, studies looking at power usage by datacenters found that some were using as much energy as small cities, and by 2025, the tech sector could account for 20% of global electricity usage. Then something happened: Datacenters started becoming more efficient, and major cloud providers started making commitments to sustainability. According to a report published in *Science* magazine in 2020, while datacenter demand grew by 550% in the preceding eight years, power consumption by data centers grew just 6%.

Still, the rapid and widespread adoption of cloud infrastructure means that datacenters remain a significant user of resources—2% of total energy use in the United States, according to the U.S. Department of Energy. For large-scale providers of cloud services, this growth in demand has brought a heightened understanding of the power required to fuel a data-driven world and an imperative to make sustainability and decarbonization central to operations.

"The culture is changing," says Edward Ferrara, research director, cloud to edge datacenter strategies at IDC. "Seven years ago, if you talked to a datacenter executive, they'd say they weren't that concerned about sustainability. That opinion has greatly changed. It's a big issue."

Microsoft, which operates a global network of datacenters for its cloud services, has a long-term vision that by 2030, 100% of its electricity consumption, 100% of the time, will be generated from zero-carbon sources. This "100/100/0" commitment recognizes not only the critical obligations Microsoft has as a major consumer of electricity, but also the opportunities that come with it, says Brian Janous, general manager of energy and renewables at Microsoft.

"Energy is the lifeblood of the cloud. It's what we need to grow our business, so we are, in essence, part of the energy supply chain and have a responsibility as a result," he says. "And because we do have a large voice in the sector, we always ask what we can do to accelerate the decarbonization of the electricity supply."

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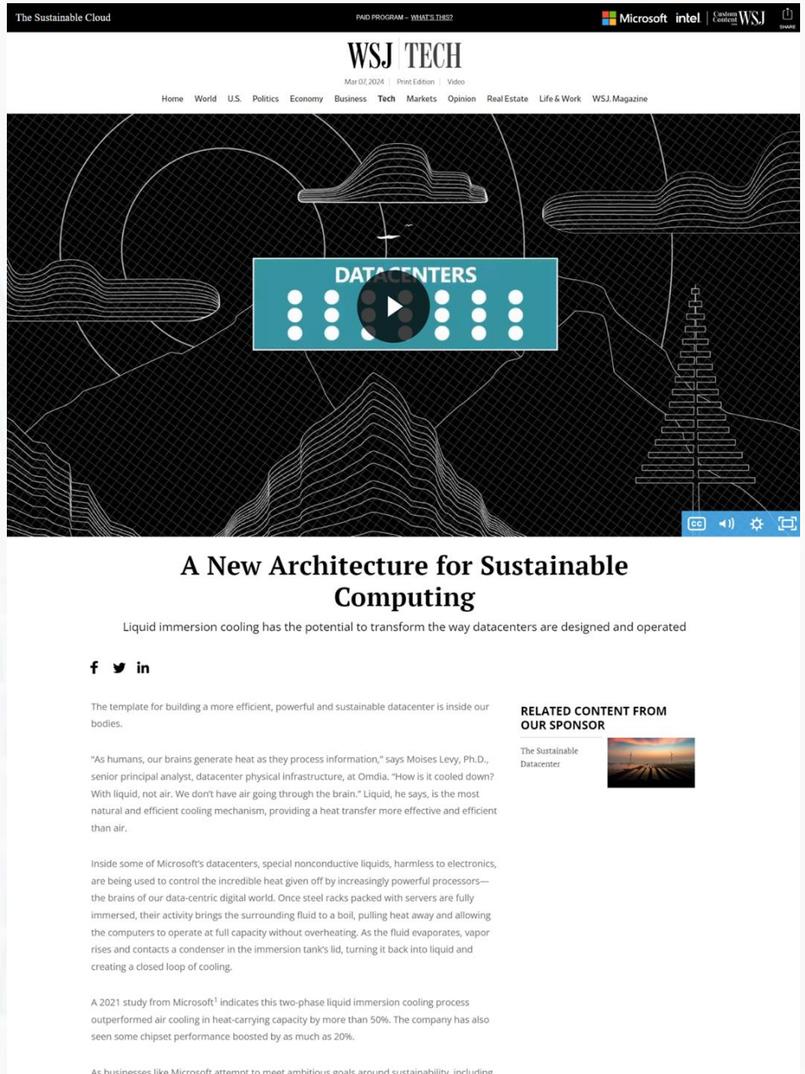

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A New Architecture for Sustainable Computing

Liquid immersion cooling has the potential to transform the way datacenters are designed and operated

The template for building a more efficient, powerful and sustainable datacenter is inside our bodies.

"As humans, our brains generate heat as they process information," says Moises Levy, Ph.D., senior principal analyst, datacenter physical infrastructure, at Omdia. "How is it cooled down? With liquid, not air. We don't have air going through the brain." Liquid, he says, is the most natural and efficient cooling mechanism, providing a heat transfer more effective and efficient than air.

Inside some of Microsoft's datacenters, special nonconductive liquids, harmless to electronics, are being used to control the incredible heat given off by increasingly powerful processors—the brains of our data-centric digital world. Once steel racks packed with servers are fully immersed, their activity brings the surrounding fluid to a boil, pulling heat away and allowing the computers to operate at full capacity without overheating. As the fluid evaporates, vapor rises and contacts a condenser in the immersion tank's lid, turning it back into liquid and creating a closed loop of cooling.

A 2021 study from Microsoft[1] indicates this two-phase liquid immersion cooling process outperformed air cooling in heat-carrying capacity by more than 50%. The company has also seen some chipset performance boosted by as much as 20%.

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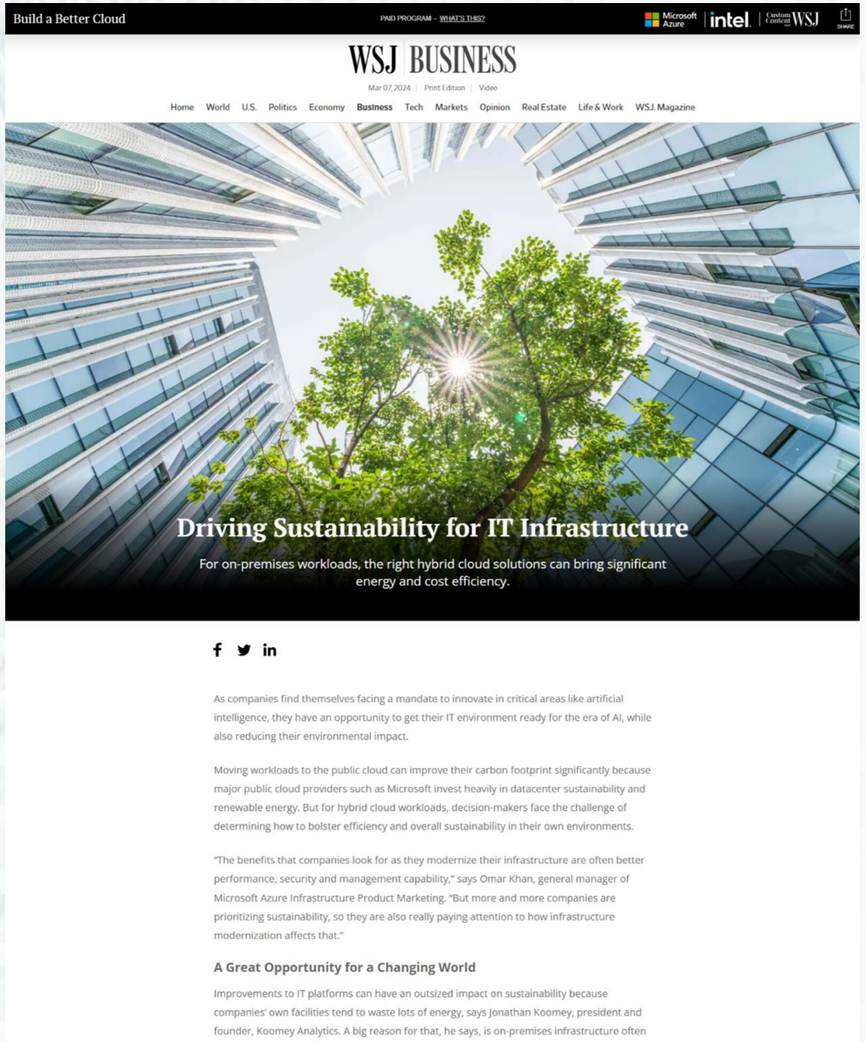

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Driving Sustainability for IT Infrastructure

For on-premises workloads, the right hybrid cloud solutions can bring significant energy and cost efficiency.

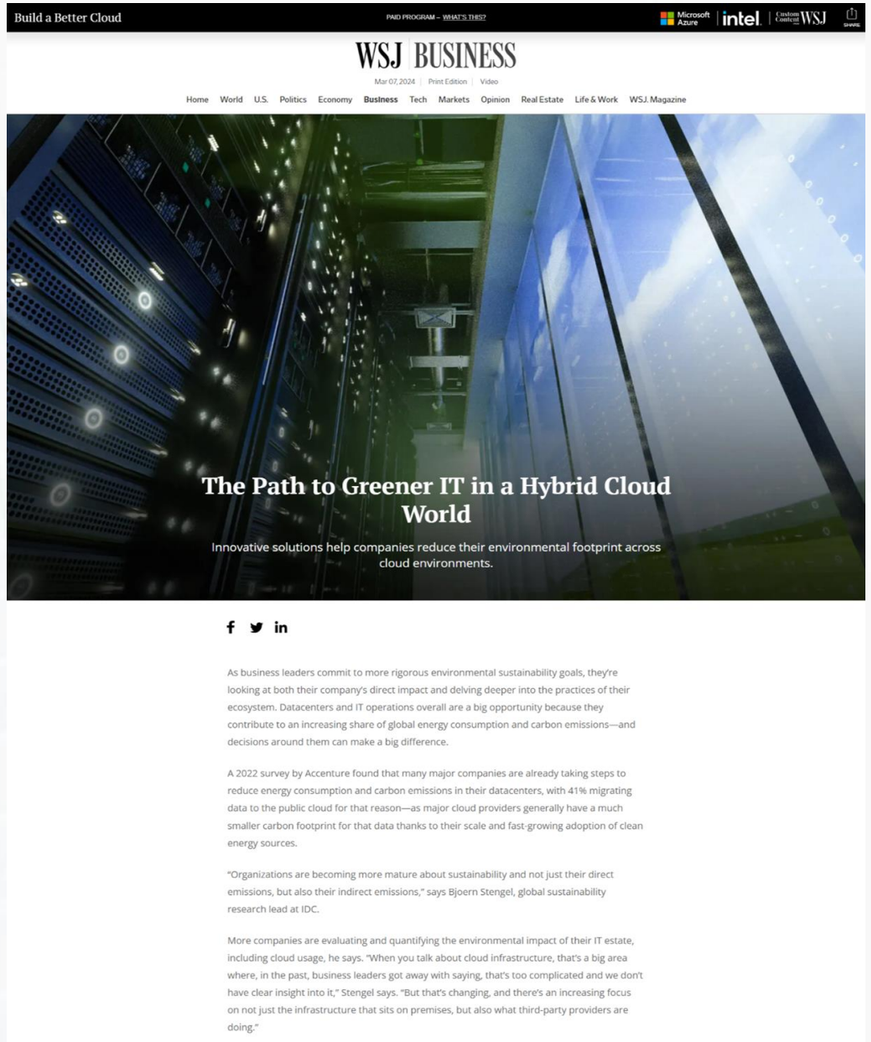
As companies find themselves facing a mandate to innovate in critical areas like artificial intelligence, they have an opportunity to get their IT environment ready for the era of AI, while also reducing their environmental impact.

Moving workloads to the public cloud can improve their carbon footprint significantly because major public cloud providers such as Microsoft invest heavily in datacenter sustainability and renewable energy. But for hybrid cloud workloads, decision-makers face the challenge of determining how to bolster efficiency and overall sustainability in their own environments.

"The benefits that companies look for as they modernize their infrastructure are often better performance, security and management capability," says Omar Khan, general manager of Microsoft Azure Infrastructure Product Marketing. "But more and more companies are prioritizing sustainability, so they are also really paying attention to how infrastructure modernization affects that."

A Great Opportunity for a Changing World

Improvements to IT platforms can have an outsized impact on sustainability because companies' own facilities tend to waste lots of energy, says Jonathan Koomey, president and founder, Koomey Analytics. A big reason for that, he says, is on-premises infrastructure often



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The Path to Greener IT in a Hybrid Cloud World

Innovative solutions help companies reduce their environmental footprint across cloud environments.

As business leaders commit to more rigorous environmental sustainability goals, they're looking at both their company's direct impact and delving deeper into the practices of their ecosystem. Datacenters and IT operations overall are a big opportunity because they contribute to an increasing share of global energy consumption and carbon emissions—and decisions around them can make a big difference.

A 2022 survey by Accenture found that many major companies are already taking steps to reduce energy consumption and carbon emissions in their datacenters, with 41% migrating data to the public cloud for that reason—as major cloud providers generally have a much smaller carbon footprint for that data thanks to their scale and fast-growing adoption of clean energy sources.

"Organizations are becoming more mature about sustainability and not just their direct emissions, but also their indirect emissions," says Bjoern Stengel, global sustainability research lead at IDC.

More companies are evaluating and quantifying the environmental impact of their IT estate, including cloud usage, he says. "When you talk about cloud infrastructure, that's a big area where, in the past, business leaders got away with saying, that's too complicated and we don't have clear insight into it," Stengel says. "But that's changing, and there's an increasing focus on not just the infrastructure that sits on premises, but also what third-party providers are doing."

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日本积水化学工业株式会社，主要生产及销售液晶用微电子、感光性材料、半导体材料等工业用品

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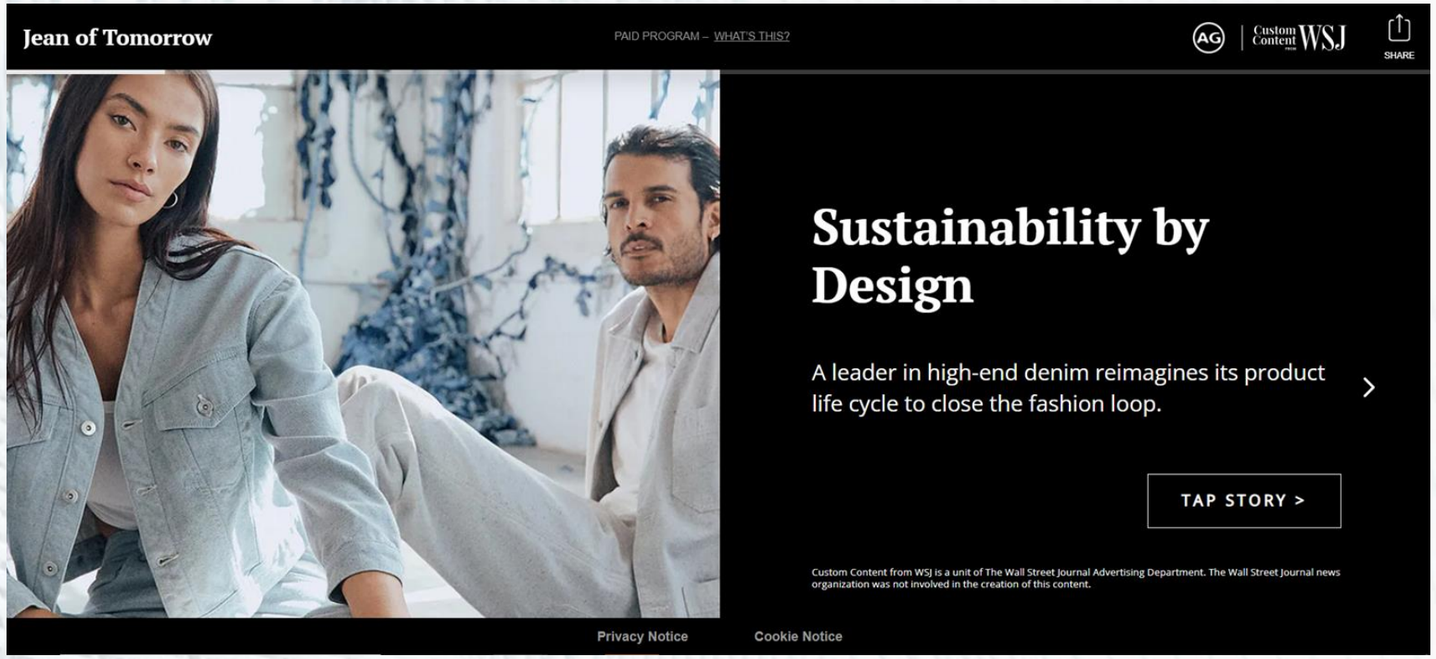
THE STUFF OF

SUSTAINABLE DREAMS

A Japanese manufacturer has spent decades showing how material innovation can form the very fabric of a vibrant and sustainable future.

Today, the world is united by a need to overcome myriad collective challenges, from climate change to health concerns. Facing global warming and resource depletion, forward-looking companies are investing in safety systems for electric and autonomous vehicles, while infrastructure decay in the world's megacities is opening fresh ways to reimagine urban life that is both vibrant and sustainable.



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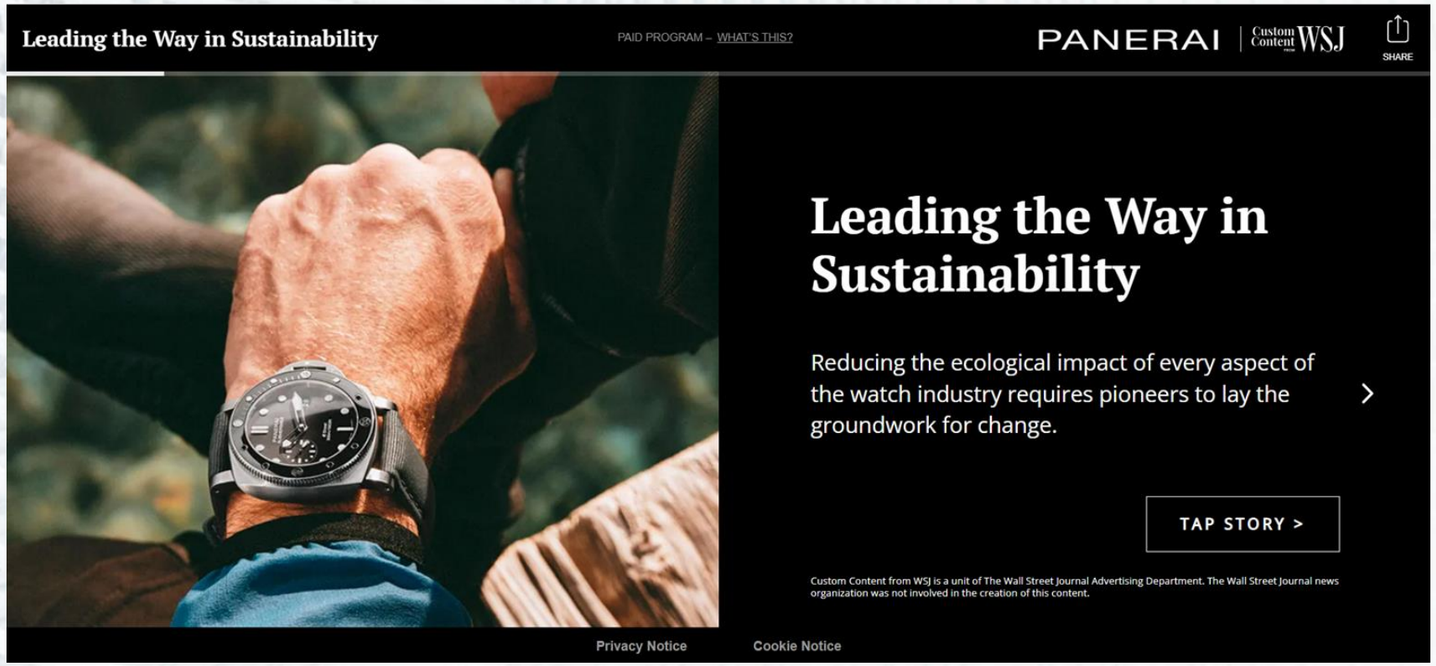

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