

# 《全球—中国低碳发展分析》第一期

## 内容摘要

### ● 专题分析：国际碳市场发展展望

2012年后国际碳市场将何去何从，这是当前众多碳市场参与方最为关注的问题。本专题在全面梳理国际碳市场现状和面临挑战的基础上，结合当前国际气候谈判形势和各国国内政策发展动态，对未来国际碳市场的发展趋势和市场规模进行了全面、深入、细致、定量的分析，对中国碳市场参与方准确把握碳市场发展趋势具有重要参考价值。

### ■ 低碳政策

在谈判跟踪方面，本期重点剖析了联合国气候变化波恩谈判，对年底德班会议前还将举行的各类气候变化会议的看点进行了重点介绍，并结合主要国家的期待，对年底德班会议成果进行了初步评估。

有关灵活机制的谈判直接关系到未来发展中国家如何参与国际碳市场，本期分析在跟踪联合国相关谈判进程中的同时重点介绍了波恩会议在灵活机制方面所取得的主要进展，并对欧盟提出的有关建立新的灵活机制的提案进行了分析介绍。

主要经济体动态部分，在持续跟踪主要国家国内碳交易机制建设进展的基础上，本期详细介绍了澳大利亚、韩国和美国加州相关国内碳交易机制的建设情况，并分析了他们的潜在影响。

为帮助客户持续跟踪了解中国的低碳政策发展走向，本期还重点介绍了中国碳交易试点建设进展情况和国务院最新公布的节能减排工作方案。

### ■ 碳市场

碳市场动态部分，基于2010年和2011年上半年国际碳市场的表现和特点，对当前碳市场的表现和动向进行了深入分析，并对2011年下半年碳市场的发展进行了预测。同时还对包括欧洲排放交易体系、美国RGGI在内的主要国家碳市场发展动态进行了跟踪分析。

CDM/JI动态部分，对6月以来全球CDM/JI项目动态进行了梳理，包括对新增项目、分布领域、减排量和价格等重要信息的更，并从中发现了近期碳市场的一些异常表现及其原因。尤其是对中国业主关心的CDM项目运行管理办法的最新修订和风电、水电最高历史电价数据更新问题，进行了全面、深入的介绍和分析。

针对2012年后政策的不确定性，分析了CDM项目当前面临的问题及今后可能的出路，并对CDM的相关改革和发展前景进行了评估。

## ■ 行业低碳

航空业将可能被纳入欧盟排放交易体系,本期介绍了欧盟相关政策的最新进展以及中欧、美欧围绕这一问题所进行的一系列政治较量。

此外,本期产品还介绍了国际海事组织近期通过的有关国际海运减排标准和相关影响,特别是对国际海事组织在推动利用市场机制促进海运业减排方面的发展动向进行了分析。

## ■ 地区低碳

各地“十二五”规划是否已经如何体现了低碳绿色发展的理念,本期产品全面梳理了全国各省“十二五”规划相关内容,并对相关特点进行了深入分析。

在实例方面,本期产品重点介绍了如何利用 PCDM 机制推动 LED 路灯的大规模替换。基于各地对 LED 照明产业发展的政策支持,我们从 LED 路灯应用前景、通过碳市场进行推广的相关方法学和项目开发模式等方面对 LED 路灯替换项目进行了全面介绍和评估。

最后,本期内容还介绍了深圳新能源汽车碳补偿机制,作为利用市场机制推动地方低碳发展的一个实例,无论对地方政府还是碳市场参与方都具有积极借鉴意义。

# Highlights of First Issue of

## *Global-China Low Carbon Development Analysis*

### ● **Featured Analysis: Prospect of International Carbon Market**

How will the international carbon market evolve after 2012, this is one of the greatest concerns to most of the participants in the carbon market. Based on a comprehensive study on the current status of and major challenges to the international carbon market, and considering the latest development of the international climate negotiations and domestic policies, we have made a very comprehensive, in-depth assessment on the future evolvement of the international carbon market and also made a quantified analysis on the size and scale of the future market. This analysis will provide meaningful reference to market participants for them to better understand the future international carbon market.

### ■ **Low carbon policies**

To follow to the international climate negotiations, we have made an analysis on the UN Bonn negotiation, provides some detailed information and guidance on how to observe various international conferences on climate change before Durban, and based on the expectations of Parties expressed during the Bonn meeting makes some early assessments on the possible outcome of the Durban Conference.

On the negotiations on flexible market mechanisms, we hereby provides some assessments, based on our long term follow up of this issue, on the latest development and progress made during the Bonn meeting. We also provide a comprehensive analysis on the EU's Submission to the Bonn Conference on a proposal of introducing new market mechanisms.

We also systematically follow up the development on the introduction of a domestic emission trading scheme in major countries and regions. And in this issue of the Analysis, we focus on the latest development in Australia, South Korea and California together with the provision of an analysis on their potential influence.

On China's national policies on low carbon development, we hereby provide an overall introduction to the latest development on the building of pilot domestic emission trading schemes in China. We also introduce a series of complementary policies and measure formulated by the central government to promote low carbon development in the 12<sup>th</sup> Five Year Plan period.

To help our clients constantly follow up the latest development of China's low carbon policies, we hereby provide a comprehensive introduction on the progress of various types of domestic pilot emission trading programs in China and the newly promulgated Work Program on Energy Conservation and Pollution Reduction by the State Council.

### ■ **Carbon Market**

On part of the dynamics of the carbon market, based on the performance and character of the international carbon market in the year of 2010 and first half of 2011,

we have made an in-depth analysis on the current performance and trend of the carbon market, and also made some predictions on its performance and development for the second half. By follow up the latest development in the carbon markets in various major countries and regions, we provide an updated information and analysis on the development of EUETS and RGGI.

On CDM and JI projects, we make an overall assessment on the latest development of the CDM/JI projects globally since June, including the numbers of new projects, their distribution, emission reductions and price, from which we can see some unusual characters and the reasons behind in the recent development of CDM/JI projects. We also provide a comprehensive and detailed introduction and analysis on the new version of China's national Regulation on Development and Management of CDM Projects, and on the issue of historical highest prices of wind and hydroelectric prices in China.

On the issue of post 2012 policy uncertainty, we have made an analysis on the current challenges of CDM projects and their possible way out in the near future, and also made an assessment on the possible reform and prospect of CDM.

### ■ **Low carbon in sectors**

The aviation sector is to be included in the EUETS, and this issue of the Analysis provides an introduction to the latest development of EU's relevant policy and the Sino-EU and US-EU political dispute over this issue.

We also provide an introduction to the latest development in IMO on pursuing a global solution on GHG emission reductions in the maritime transportation sector, and analysis on the potential influence of the newly adopted energy efficiency design index for new ships.

### ■ **Regional low carbon policies**

On how China's different provinces and regions are pursuing a low carbon development path embodied in the 12<sup>th</sup> Five Year Plan, we provide a comprehensive analysis and assessment on the various 12<sup>th</sup> FYPs in different provinces, and make an in-depth analysis on their characters.

We provide a featured case study on how to promote the LED street lamp replacement through PCDM mechanism, and based on an analysis of the prospect of the utilization of LED street lamp, the relevant CDM methodologies and program development model, we have made a comprehensive introduction and assessment on the LED street lamp replacement PCDM project.

We also provide an example on the promotion of new energy vehicle through a carbon offsetting mechanism in the city of Shenzhen. As a specific case of promoting low carbon development through market mechanism, this case provides some exemplary reference to local officials and market participants.