

《全球—中国低碳发展分析》第二期

内容摘要

● 专题分析：欧盟航空减排争端升级和中国航空业的应对策略

随着 2012 年的临近，欧盟有关将航空业纳入 EUETS 的指令即将付诸实施，这在国际上引发了新一轮的反对与抗议声浪。欧盟与其他国家之间围绕航空减排问题的这场争议正面临进一步升级的危险。相关法令对航空业，尤其是中国的航空业究竟将产生什么影响，这一争端究竟会朝什么方向发展，最终将如何收场，航空公司应当采取什么策略加以应对，本文对这些问题进行了全面、深入的分析，并基于形势分析和定量评估，为中国航空业提出了对策建议。

■ 低碳政策

在谈判跟踪方面，本期重点剖析了德班会议面临的形势与主要看点，并梳理了主要谈判方对德班会议的期待与立场，同时结合德班会议的一系列外围会议，为帮助、引导客户跟踪、观察德班会议提供了有力指导。

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，本分析将持续跟踪联合国相关谈判进程，本期重点介绍了巴拿马会议在灵活机制方面所取得的主要进展，并针对欧盟最新提案，分析了德班会议可能在灵活机制问题上取得的成果。

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，本期进一步介绍了最近两个月内澳大利亚、韩国和美国加州相关国内碳交易机制建设的最新进展，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，本期还重点介绍了广东省碳交易试点建设进展情况和国家最新出台的有关推动落实“十二五”相关低碳绿色发展目标的政策举措。

■ 碳市场

市场规则透视部分，针对 2012 年后政策的不确定性，围绕《京都议定书》与国际碳市场的关系，全面梳理了《京都议定书》对碳市场的意义，并在第二承诺期前景不明的情况下，对碳市场的下一步发展走向进行了分析预测。

碳市场动态部分，重点对欧洲碳市场近两个月内的疲软表现进行了评估，并分析了其背后深层次原因。同时还对欧盟加强碳交易安全监管、美国 RGGI 收紧排放限额、日本推动双边减排机制等重要碳市场发展动态进行了跟踪分析。

CDM/JI 动态部分，继续对近两个月内全球 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新。

本期产品还重点分析了 PCDM 相关规则动态与发展前景，同时还对有关 2012 年后 CDM 碳基金的发展动态进行了跟踪与分析。

■ 行业低碳

本期重点分析了电力行业有关 IGCC 技术推广情况及相关 CDM 方法学产生的背景与应用前景。

照明行业，针对中国政府逐步淘汰白炽灯的实施计划，本期分析了相关决定对通过 CDM 机制推广节能灯这一商业模式的影响及其未来发展前景。

针对欧盟航空减排争端，本期介绍了美国航空业起诉 EUETS 告败及国际民航组织通过相关反对欧盟将航空纳入 EUETS 决议的有关情况。

■ 地区低碳

在地方“十二五”低碳之路部分，本期重点分析介绍了各地节能减排政策体系的演变，各地建筑节能改造项目蕴藏的商机及苏州破解低碳贸易壁垒的有关举措。

在实例方面，本期产品全面介绍了太阳能光伏屋顶发电技术推广运用前景、相关方法学开发应用及典型项目开发模式等。

Highlights of Second Issue of

Global-China Low Carbon Development Analysis

● **Featured Analysis: The Upgrading of the Conflict over EU ETS and Strategy of China's Aviation Industry**

As 2012 is approaching, the EU is to implementing its legislation to include the aviation sector into EUETS, and this had triggered a new round of opposition and protests. The conflict over EUETS is upgrading. How will the dispute evolve in the future, what will be the implications of EU's decision over the aviation sector, especially China's aviation sector, how should the sector respond, this Analysis provides a comprehensive and in-depth assessment on this issue, and based on the current situation and a quantified assessment, makes some concrete and practical proposals to the aviation sector.

■ **Low carbon policies**

On international climate negotiations, we have made an assessment on the current general background of the Coming Durban Conference, and based on the positions of major Parties, and the outputs of a series of informal meetings aiming at pushing the negotiations ahead, highlighted several key aspects of the Durban Conference which deserve special attention. We hereby provide strong guidance to our clients on how to follow up and observe the coming Durban Conference.

On the negotiations on flexible market mechanisms, we hereby continues to provide some assessments, based on our long term follow up of this issue, on the latest development and progress made during the Panama meeting. We also provide a comprehensive analysis on EU's expectation on and Durban's prospect for the progress of market mechanisms, based on the EU's latest Submission before the Panama Meeting.

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, during the recent two months, 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 program design of the pilot domestic emission trading scheme in the Guangdong Province. We also continue to introduce a series of complementary policies and measure formulated by the central government to promote low carbon development in the 12th Five Year Plan period.

■ **Carbon Market**

For this issue, we highlight an analysis on the relationship between the Kyoto Protocol and the international carbon from an international and long perspective. We hereby made an assessment on the role the Kyoto Protocol played in building a carbon market, and due to the great uncertainty for a second commitment period and even the continued existence of the Protocol, provide some prediction on the future

development of the carbon market.

On part of the dynamics of the carbon market, we have made some assessment on the performance of the European carbon market, and reasons behind, during the last two months. We also followed up the latest development on issues, such as the tightening up of security and supervision of EUETS, and tightening of cap under RGGI, and the development of Japan's bilateral mechanisms, etc.

On CDM and JI projects, we continue to make an overall assessment on the latest development of the CDM/JI projects during the last two months, including the numbers of new projects, their distribution, emission reductions and price.

Lastly, we also provided an analysis on the latest development on rules of PCDM and their prospects in the future, and at the same time followed up some new developments on business model in several Carbon Funds.

■ **Low carbon in sectors**

We hereby highlighted an analysis on the development and promotion of IGCC technology in the power sector, relative CDM methodology development, and their prospects of application.

On the lighting industry, based on a recent ban by the Chinese Government to the use of incandescent bulbs, and a roadmap of their gradually phasing out, we hereby analyzed the potential negative impact of this ban on the business model to promote energy saving lights through CDM.

On aviation, we also provided some further detailed information and analysis on the latest development on the dispute over EUETS, including the case before the European Court of Justice brought by US aviation industry, and the pass by ICAO a resolution express strong objection to EU for its decision to include aviation into EUETS.

■ **Regional low carbon policies**

On how China's different provinces and regions are pursuing a low carbon development path embodied in the 12th Five Year Plan, we continue to follow up the evolvement of policies and measures aiming to promote energy conservation and emission reduction at local levels, and provided some introduction to good practices, including how the city of Suzhou in trying to help exporters to circumvent low carbon trade barriers, and how various cities in China are promoting the renovation of old buildings for energy conservation purposes.

And lastly, we provided a featured case study on the prospect of the popularization of rooftop solar photovoltaic power generation project, the development of relative CDM methodologies, and various typical models for project development.