
《全球—中国低碳发展分析》第三期

内容摘要

专题分析

本期产品甄选“中国温室气体排放统计核算体系建设的挑战和机遇”专题。任何温室气体减排政策和目标的实现，都离不开一套行之有效的温室气体排放统计和核查体系。本专题对联合国气候变化框架公约及主要发达国家建立的相关温室气体排放统计与核查体系的主要内容、特点及其功能做了比较全面的介绍与分析，并在此基础上介绍了我国建立相应国内温室气体统计核算体系的必要性、主要目标、取得的进展及面临的困难。最后，结合我国温室气体排放统计核算体系建设的挑战与机遇，本专题着重分析了这项工作对政府及相关行业提出的要求和重点工作，以及如何带动排放统计、核算、数据化管理、培训等专业化服务的发展，催生新的就业岗位，如何给相关行业及从业人员带来新的发展机遇。

低碳政策板块

国际聚焦部分，本期首先围绕德班会议达成的与国际灵活机制相关的主要文件，简要分析了国际灵活机制下一步谈判走向，以及与此相对应的国际碳市场面临的主要问题和下一步走向。针对欧盟在德班会议前委托相关研究机构提出的一份“有关 CDM 有效性的研究报告”，通过全面介绍报告内容，我们期待能够帮助读者更进一步深入理解和把握欧盟有关国际碳交易机制的立场和未来政策走向。同时，我们还在以往分析报告的基础上，对澳大利亚、美国及韩国国内碳市场的建设进展进行了跟踪分析，并介绍了加拿大魁北克省最新引入碳交易机制的情况及北欧国家在推动相关行业碳交易机制方面的最新动向。中国关注部分，本期继续跟踪“两省五市”交易试点的建设，并重点介绍了重庆碳交易试点建设的基本情况。同时围绕“十二五”控制温室气体排放工作方案，重点分析了中国“十二五”期间控制温室气体排放主要政策措施。

碳市场板块

碳市场动态部分，首先对 2011 年全球碳市场整体运行做了全面系统的疏通和整理。其次分析了欧洲碳市场近期的行情及其面临的供过于求的困境，欧洲市场碳价暴跌对企业的影响及欧盟对此的相关反应。CDM/JI 动态部分，继续对全球 CDM/JI 项目进展包括公示情况、注册数量和签发量以及 CDM 项目全球分布情况都进行了定期总结，并对中国 CDM 项目情况进行了简要的概括。此外，本期还分析了高效燃煤发电方法学被 EB 暂停和 EB 批准对 HFC23 方法学的修订对未来碳市场供应的影响，欧盟环境机构报告质疑大水电 CDM/JI 项目以及碳吸收及存储（CCS）项目被批准进入 CDM 机制对中国国内碳市场的潜在影响。

行业低碳板块

主要介绍了国际海事组织推出的两项强制性能效新标准，并分析了该标准对我国海运业可能产生的影响。航空业方面，基于国际民航组织向德班会议提交的工作报告，梳理了国际民航组织在推进国际航空减排协议方面开展的工作、取得的主要进展及下一步工作规划，特别是对成员国确立的基于市场的减排机制的基本原则和下一步工作计划做了重点介绍。针对对欧盟航空减排争端，本期继续更新了相关动态分析。关于电力行业，我们对煤和生物质混燃技术进行介绍，并对其发展现状和原因进行了全面分析。

地区低碳板块

“十二五”低碳之路部分着重介绍和分析了各地大力推进建筑领域节能减排，相关地方政府加强节能减排监管及考核的举措，各类绿色信贷对节能减排的推动以及各地通过优惠政策示范推广新能源汽车的主要情况等。低碳项目推介部分，重点介绍和分析了沼气产业的前景及其相关 PCDM 项目的开发潜力，同时介绍了汽车加注液化天然气 LNG 替代柴油技术的推广及其 CDM 方法学开发等情况。

Issue 3 of Global-China Low Carbon Development Analysis Released

In this issue, the featured analysis is focused on “Challenges and opportunities in setting up of greenhouse gas emission measurement and verification system in China”. Any greenhouse gas emission reduction policy and the realization of any GHG reduction goal are inseparable from a set of effective greenhouse gas emissions measurement and verification system. This analysis gave a brief introduction and assessment on greenhouse gas emission measurement and verification system built by UNFCCC and the main developed countries, which focused on their main contents, characteristics and functions for reference of setting up the relative Chinese GHG measurement and verification system. In addition, based on the comprehensive introduction, the report analyzed the necessity, main objective and existing problems in the process of building the Chinese domestic GHG measuring and verification system. Lastly, combining the challenges and opportunities faced by the system building process, this analysis provided an in-depth assessment on the key tasks for government and relative sectors, and explained on how it could enhance the development of measurement, verification system in enterprises, the need for digital management for GHG emission data, and related training system and other professional services, and how it could create new jobs, how it could bring more opportunities and development room for relative sectors.

The highlights of the four main chapters are as follows:

Low carbon policies

On international climate negotiations, this report briefly analyzed the main progress made in negotiations on international flexible mechanisms, and the major problems as well as future trend faced by the international carbon market, according to the major documents reached by the Durban climate conference.

Facing with an uncertain future carbon market, EU as a major player in the international carbon market commissioned relative organizations and research institutions to release a report on “study on the integrity of CDM”. We hereby conducted a systematic and comprehensive introduction and analysis of this report for our clients, to help them get well understanding on the current status and future development of EU policy related to emission trading and the international carbon market, especially EU’s stance on the future of CDM.

We also systematically follow up the updating information on various domestic emission trading schemes in major countries and regions involving in Australia, USA and South Korea, and introduced the situation of carbon trading system newly established by Quebec of Canada, as well as the new activities on promoting new market mechanisms by Nordic countries.

On China’s national low carbon development policies, the analysis tracked the overall process on domestic carbon emission trading pilot schemes in “two provinces and five cities” and paid special attentions to the latest development on the Chongqing pilot. We also provide a review and analysis on main Policies and Actions for controlling GHG emission on the basis of 12th five year work plan for controlling GHG emission.

Carbon Market

For this issue, we mainly highlighted a review and analysis on global carbon market performance in 2011 including price changes in trend and the problem of over-supply in EU carbon market as well as the influence of the carbon price plunge to businesses and reactions of EU on this issue.

On CDM and JI projects, we continued to make an overall summary on the entire development of global CDM projects so far which contains the number of newly-publicized CDM and JI projects, number of newly-registered CDM and JI projects and the credit issuance volume of CDM and JI projects as well as general analysis on distribution of CDM projects in global scopes and in China. Lastly, on the CDM policies, we hereby provided an analysis on the impacts of high efficient coal-fired power generation methodology to be suspended and EB's approval on the proposal of amendments to HFC23 methodology. Moreover, we also indicated a report by EU Environmental Institutions doubting on large hydropower CDM and JI projects and the potential influences on the approval of carbon capture and storage (CCS) projects entering the CDM.

Low carbon in sectors

On the sector of maritime transportation, this report introduced two new mandatory "low carbon" energy efficiency standards and their far-reaching impacts on China's maritime industry. On aviation industry, we also provided some further detailed information and analysis on the working and main movements as well as next plans of ICAO to promote the international agreed solution for reducing GHG emission according the report submitted by ICAO to the Durban Conference, especially after ICAO member states had agreed on the main principals and a work plan on seeking market based mechanism to reducing emission from the global aviation sector. We then highlighted an introduction and analysis on mixed combustion technology of coal and biomass in terms of its overview, status quo and potentials for further technological development.

Regional low carbon policies

This part particularly focused on the low carbon path on the energy efficiency in the construction sector during the 12th five-year plan period. Focused on energy conservation and emission reduction, various local governments have tightened up their supervision and evaluation system on the enforcement of relative policies. We continued to follow up the development of various green credit projects for boosting energy conservation and emission reduction, and preferential policies on the demonstration and promotion of new energy vehicles at local level.

And lastly, we offered two latest case studies, one of which is on the prospects of biogas industry and development of related PCDM project, and the other is on the technology of replacing diesel by LNG to fill automobiles, the methodology and its development.