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# 《全球—中国低碳发展分析》第四期

## 内容摘要

### ■ 专题分析

近年来，风电产业在我国取得了快速发展，在优化我国能源结构的同时，也带来了丰厚的“碳资产”收益。本期以“中国风电发展现状、投资分析与碳资产评估”为专题进行了深入分析。专题对中国风电行业的发展状况进行了系统梳理，并结合相关权威数据，整理得出全国及各省风电项目装机容量分布及装机状况，全国和各省风电项目平均设计年利用小时数及实际利用率，并进一步总结了影响风电投资成本的诸多因素。最后，通过考察单位装机产生的 CER 的情况，剖析了风电企业项目装机规模和减排量之间的关系，并对各省风电碳资产潜力进行了评估。

本专题基于权威的数据支撑，内容详实、图文并茂地对与风电投资收益相关的核心指标进行了深入、细致、定量的分析，籍以对风电行业的投资决策提供有益参考。

### ■ 低碳政策板块

国际聚焦部分，重点介绍了波恩气候变化会议，系统罗列了这次会议涉及的各谈判小组的主要议题，总结了会议取得的主要成果，分析了新的谈判形势和主要动向，并重点介绍了围绕新市场机制的最新谈判进展。此外，美国环保署对电厂碳排放新标准的制定、墨西哥气候变化法案的通过、韩国通过引入碳交易机制的立法、新西兰碳交易相关机制及日本国内减排政策的调整等动态，也都值得关注。

中国关注部分，继续对国内各碳交易试点取得的最新进展进行了跟踪分析，同时结合中欧碳交易机制圆桌会议及“中国碳交易市场展望：机遇与挑战”研讨会等国内碳交易相关交流活动，剖析了当前碳交易试点建设“散而不乱”的特点。通过对应对气候变化立法相关动态的解读，明确了这项立法的相关程序和当前所处阶段，并澄清了各方对气候立法的一些认识偏差；通过对工信部《工业节能“十二五”规划》的解析，介绍了重点行业的节能目标与措施，分析了主要存在的问题与困难。

### ■ 碳市场板块

全球碳市场部分，重点对 2012 年第一季度以来碳市场的状况进行了数据上的梳理，并对国际自愿减排市场的动态进行了介绍。2 月份以来，欧盟碳市场 EUA 与 CER 价格持续下跌，通过对近期欧盟碳价格走势分析，总结了价格下跌的原因并介绍了欧盟拟采取的措施及其面临的障碍。

在 CDM/JI 动态部分，汇总了截止 2012 年 5 月份 CDM/JI 项目的注册和签发情况并对相关信息进行了及时地更新，梳理了全球 CDM 项目地区分布的变化情况及中国 CDM 项目的发展

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情况。

最后，本板块还介绍了一些改良 CDM 的最新动向，通过分析 EB 关于实施标准化基准线的最新决定，进一步对标准化基线存在的主要障碍和困难进行了归纳总结。

### ■ 行业低碳板块

主要更新了航空、航海及能源行业的相关动向。航空部分介绍了国际民航组织（ICAO）向刚刚结束的波恩会议提交的关于其在航空温室气体减排领域所开展的工作进展及动态的报告。欧盟航空减排争端一直引人关注，本板块重点对争端的发展动向、ICAO 的行动以及中国的应对措施进行了全面介绍与剖析。航海部分主要对国际海事组织（IMO）在波恩会议上提交的工作报告进行了简要分析。能源行业重点介绍了“双反”背景下的中国光伏产业的现状、“双反”事件对产业的影响、中国的应对策略及产业的未来发展进行了全面剖析。最后还对天然气热电联产技术及其 CDM 方法学做了系统介绍。

### ■ 地区低碳板块

“十二五”低碳之路部分，首先介绍了通过 CDM 项目等市场机制推动农村低碳化发展的状况，并对我国低碳园区建设进行了关注，重点介绍了“低碳园区”的相关政策法规。之后，通过我国近期推出的低碳交通规划与美国低碳交通政策的对比，参照美国的经验，剖析了我国低碳交通的发展潜力和方向。

低碳项目推介部分主要介绍了 LNG 汽车产业前景及其 PCDM 项目开发，通过对产业政策的介绍、产业模式的分析以及 PCDM 项目开发所需数据的梳理，期待对行业参与者提供有益的帮助。

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## Highlights of Fourth Issue of *Global-China Low Carbon Development Analysis*

### Featured Analysis

In recent years, the wind power industry in China has been developing at a fast pace, contributing to an optimized energy structure while delivering lucrative revenues on “carbon assets”. This issue gives a comprehensive analysis of the current development of and investment in China’s wind power industry as well as the carbon asset appraisal. It systematically states the current status of China’s wind power industry calculates the accumulative and incremental installed capacities in each and every province and describes the different features of those provinces with huge capacities. Based statistics from authoritative databases, it illustrates the distribution of wind power installed capacity across the country and within provinces as well as installed capacity of various projects, then it derives the actual utilization ratio of wind turbines based on designed average annual operation hours of wind power projects and their actual operation hours, and finally it further summarizes many factors that would affect the wind power investment decisions. By calculating CERs generated from unit installed capacity, the issue also analyzes the relationship between installed capacity and emission reduction of wind power plants and evaluates the carbon asset generation potential of various provinces.

Based on authoritative data, this issue gives rich content and pictures to make an in-depth, detailed and quantitative analysis of the core indicators related to the returns on wind power investment in order to provide positive reference for decision-making on wind power investment.

### ■ Low Carbon Policy

For the international focus part, this issue mainly follows up the recent Bonn Climate Change Conference by first introducing specific discussions relating to major agenda items under different negotiations bodies, and then summarizes major achievements, highlights the latest development and future trend of negotiations, and more importantly, updates the progress on the negotiations of new market mechanisms. In addition, many other latest developments related to low carbon policies in major economies also deserve our attention, including new standards set for power plant carbon emission by the EPA, passage of a Bill of Climate Change in Mexico, legislation for carbon trading in Korea, review of carbon trading mechanism in New Zealand and the adjustment of emission reduction policies in Japan.

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For China's domestic carbon market, this section continues to track the latest progress of domestic carbon trading pilot projects, and introduces the status of exchanges of ideas and discussions related with the designing of pilot carbon trading programmes. By interpreting dynamics in the climate change legislation, it explains the relevant legislation procedure and current progress and clarifies misunderstandings over current status of the climate change legislation. This part also dissects "The 12<sup>th</sup> Five-Year Plan for Industrial Energy Conservation" issued by the Ministry of Industry and Information Technology by illustrating energy conservation targets and measures for key industries as well as major problems and challenges.

### ■ Carbon Market

In terms of the global carbon market, this section sorts out data regarding the status of the international carbon market since 2012 Q1 and talks about what is going on with the international voluntary emission reduction market. Since this February, prices of EUAs and CERs in the EU carbon market have kept falling, the section analyzes the recent price trend in the EU carbon market and sums up reasons for falling prices, and suggested interfering measures under discussion and also differences within EU.

With regard to CDM/JI, the section summarizes the latest status registration and approval of CDM/JI projects by the end of May 2012 and updates relevant information. In this issue we also sorts out the changing distribution of CDM projects around the world and the development of CDM projects in China.

Finally, we also present the latest development on CDM reform, including analyzing the latest decision made by EB on the issue of standardized baseline, and further explain the major challenges of applying the baseline.

### ■ Low carbon in sectors

This section mainly introduces the latest development in aviation, maritime and energy sectors. The aviation part talks about a report submitted by International Civil Aviation Organization (ICAO) to the recent concluded Bonn Climate Change Conference, which introduced its recent progress on aviation emission reduction. The dispute around the inclusion of aviation into EUETS has been the attention grabbing, and this part makes a comprehensive introduction and analysis on the latest development of the dispute, ICAO's more recent actions and China's response measures. The maritime part also makes a brief analysis on the report submitted by International Maritime

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Organization (IMO) to the recent Bonn Climate Conference. The energy part focuses on China's photovoltaic industry against the anti-dumping and countervailing investigations and the impact brought up by those investigations, furthermore, this part fully analyzes what China could do as a response and what the future will be for China's PV industry. Finally, this part also systematically describes the natural gas CHP technology and corresponding CDM methodology.

#### ■ Regional low carbon policies

As for the low carbon development during the "12<sup>th</sup> Five Year Plan" period, the section first introduces how China promotes low carbon development in rural areas via CDM and other market mechanisms, it pays special attention to the construction of low carbon zones by explaining relevant laws and regulations. It also compares the low carbon transportation plan recently launched by China with U.S. low carbon transportation policies and gives suggestions to China's low carbon transportation by drawing experience from U.S.

In light of Promoting Low Carbon Projects, this part mainly talks about the prospects of LNG auto industry and the development of PCMD projects. It further introduces the relevant policies, analyzes the industrial models and provides some data necessary for PCMD project development.

