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Ambition of NDCs and the Growing Importance of Adaptation Measures

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COP31 is being held in Türkiye, but will global climate action make progress? The 154 countries participating in the Paris Agreement were expected to submit updated NDCs, including their 2035 targets, in 2025. Although some submissions were delayed, 127 countries had submitted updated NDCs as of the end of August 2026. According to the United Nations' assessment, when their targets—those that each country will implement unconditionally—are combined, global GHG emissions in 2035 will be 6% lower than in 2019. Including conditional targets, such as the provision of support from developed countries, the reduction would be 9%. Assuming that efforts continue through the middle of this century along the trajectory of the NDCs submitted this time, the UN projects that the temperature increase will range from 1.7°C to 2.3°C.

Our institute is analyzing the ambition of updated NDCs for several countries and regions. Japan, the EU, and South Korea can be cited as examples of countries with highly ambitious targets. These countries have set reduction targets equivalent to or exceeding those in our long-term supply-and-demand outlook's "Advanced Technology Scenario," which assumes ambitious energy security and climate action. China's reduction target, by contrast, is only equivalent to the "Reference Scenario," which extrapolates current trends. In other words, it is at a level that can largely be achieved without accelerating emissions-reduction measures. India and Russia have set targets for emissions substantially above the Reference Scenario, leaving considerable room to increase their ambition. As a result of this mixture of different levels of ambition, the combined result of the updated NDCs of the major G20 countries, for example, remains at a level equivalent to the Reference Scenario. Under the Reference Scenario, the temperature increase by 2050 is estimated at around 2°C, falling far short of the 1.5°C target. Although increasingly frequent extreme weather events indicate the need to accelerate climate action, the reality of a world that prioritizes securing energy supplies and addressing inflation makes this difficult.

Against this backdrop, there is also movement to strengthen adaptation measures. In October, the European Commission presented a proposal for a "Climate Resilience Law." It would

establish a framework for adaptation measures based on assumed temperature increases of 2°C by 2030 and 4–5°C by 2100. If the bill is enacted, the European Commission must establish an adaptation plan by the end of September 2028. In parallel, member states would be required to prepare their own risk assessments by the end of June 2029 and adaptation plans by the end of December 2030. Europe's experience of exceptionally high temperatures in the summer of 2026, which caused deaths, also appears to have provided an impetus for strengthening adaptation measures.

Japan has also established the Climate Change Adaptation Act and a Climate Change Adaptation Plan, advancing measures in parallel with mitigation efforts. Many adaptation measures are difficult to make commercially viable, making the role of the public sector particularly important. Whereas mitigation measures include mechanisms such as carbon taxes and emissions trading to encourage private-sector action, it is difficult to envision, for example, the construction of levees to prevent river flooding becoming a viable standalone private-sector business. Local governments have also faced staffing shortages in recent years, suggesting that strengthening their capacity will be necessary to implement adaptation measures.

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