Holding up the Mirror

Tracking Climate Action across UNFCCC Negotiating Groups in the Era of Geopolitical Uncertainty

Simran Sukhija and Sumit Prasad

Image: UN Climate Change (UNFCCC) Flickr.

Leaders participated in the COP31 Press Conference, Türkiye.

Executive summary

More than a decade after the adoption of the Paris Agreement in 2015, a critical question remains: **Has the implementation of climate commitments globally meaningfully narrowed the gap between stated ambition and projected outcomes? This question becomes even more critical considering recent geopolitical developments**: the United States' withdrawal from the Paris Agreement, its reversal of domestic climate regulations (The White House 2025), and the war in West Asia. These events have slowed global momentum, pushing climate priorities to the margins of international politics.

In this issue brief, **we analyse the collective progress in climate action achieved by the following negotiating groups within the United Nations Framework Convention on Climate Change (UNFCCC): the Umbrella,[1] the EU,[2] the Environmental Integrity Group (EIG),[3] and the BASIC.[4]** These groups critically shape the direction and effectiveness of global climate governance. However, at present, there is limited understanding of their collective progress, beyond their visibility in coordinating common negotiation positions and setting the climate agenda.

Based on the datasets from the first Biennial Transparency Report (BTR), including the Common Tabular Format (CTF) and Common Reporting Tables (CRT), we analyse the emissions trends of these negotiating groups in both the pre-Paris (2009–15) and post-Paris (2016–22) eras, assess their progress towards the 2030 and 2035 Nationally Determined Contribution (NDC) targets, and reflect on the annual emission reductions that will be necessary after 2030.

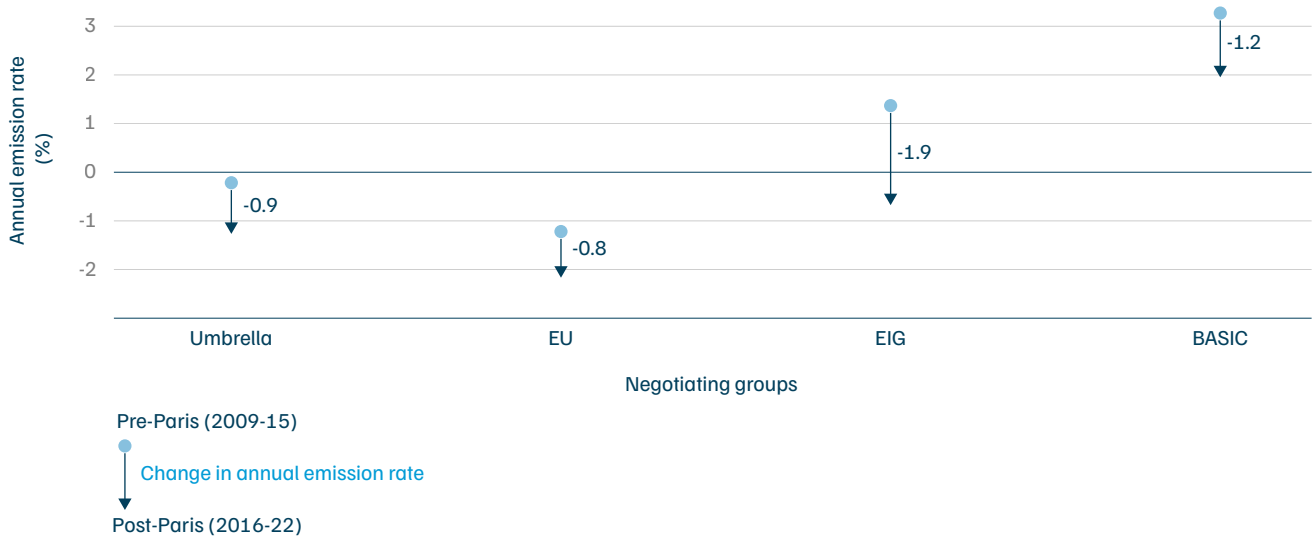
Key findings

- **Emissions levels within groups vary significantly, with a few countries dominating each group. During 2009-22, the BASIC accounted for more than half of the total emissions (52 per cent) across all the groups studied, followed by the Umbrella (32 per cent), the EU (11 per cent), and the EIG (5 per cent)**. Within the BASIC, China alone accounts for 74 per cent of its group's emissions; within the Umbrella, the US accounted for 63 per cent of its group's emissions, underscoring how single-country decisions have far-reaching consequences.

- **Annual emissions growth has slowed for all groups in the post-Paris era, but at very different rates**. The Umbrella and the EU annual emission rates declined from -0.2 per cent to -1.1 per cent and from -1.2 per cent to -2 per cent, respectively, from the pre-Paris (2009–15) to the post-Paris era (2016–22). Meanwhile, the EIG's emissions moved from a positive growth rate of 1.4 per cent pre-Paris to a decline of –0.5 per cent post-Paris. In addition, the BASIC also slowed its annual emissions growth rate from 3.3 per cent to 2.1 per cent.

- **The BASIC group collectively emitted 8.5 $GtCO_2e$ less by not following the pre-Paris (2009-15) trends in the post-Paris era (2016-22), equivalent to over 10 per cent of global 2022 emissions**. On the other hand, the Umbrella, the EU, and the EIG reduced emissions by only 3.7 $GtCO_2e$ by not following the pre-Paris trends in the post-Paris era.

Figure ES1. Annual emission rates decline in the post-Paris era



Source: Authors' analysis.

1. The Umbrella consists of Australia, Canada, Iceland, Israel, Japan, Kazakhstan, New Zealand, Norway, Ukraine, the United States, and the United Kingdom.
2. This refers to the EU (27), or the 27 member states that make up the European Union after Brexit.
3. The EIG includes both developed and developing countries: Georgia, Liechtenstein, Mexico, Monaco, South Korea, and Switzerland.
4. The BASIC includes Brazil, China, India and South Africa.

- **Wealthy negotiating groups are faring differently in terms of their 2030[5] and 2035[6] climate commitments. The Umbrella, the EU, and the EIG are projected to collectively emit 9 per cent more than their 2030 NDC targets; this is projected to increase to 19 per cent in 2035 compared to the 2035 target levels.** Only Kazakhstan, Georgia, and Ukraine are projected to meet both targets. Norway may meet its 2030 target; New Zealand, its 2035 target.

- **To meet their 2030 commitments, the Umbrella, the EU, and the EIG groups need to significantly increase their annual emissions reduction after 2022.** The UK needs to more than double its annual reduction rate; the EU would need to increase its pace nearly fourfold; and the US and Canada would need to increase theirs by 5-6 per cent per year. **Further, to reach net zero by 2050, these groups must drastically accelerate post-2030 reductions.**

- **The BASIC countries face greater developmental constraints and lower historical responsibility, but are more closely aligned with their targets.** India has already met its non-fossil-fuel capacity target[7] ahead of schedule. China has met its wind and solar capacity[8] and forest stock volume[9] targets ahead of 2030. South Africa's 2022 emissions are already within its 2030 target range. Brazil, however, lags at 20.4 per cent below 2005 levels in 2022, compared to its 2030 target of 53.1 per cent lower emissions.

As we navigate an increasingly dynamic geopolitical landscape, **negotiating blocs – such as the Umbrella, the EU, and the EIG – should accelerate short-term actions aligned with their 2035 NDC targets to prevent further overshooting and ensure that climate ambition is backed by sustained implementation efforts.** In addition, they need to significantly ramp up year-on-year reduction to ensure there is enough carbon budget left for other countries.

Image: iStock

5. Mexico is not included in the EIG group, as it has no projections in the CTF.
6. Mexico, Canada, and Japan are excluded due to the absence of 2035 projections in the CTF; Australia and Switzerland's 2035 targets, expressed as emissions budgets, are not assessed owing to the lack of 2031–2035 projections; and Israel is excluded as it has not submitted a 2035 target.
7. While India reported in CTF Table 4.2 that non-fossil-fuel-based energy resources accounted for 42.5 per cent of its installed electric power capacity in 2022, but in the BTR, it is indicated that India achieved the target of sourcing 50 per cent of its installed electricity capacity from non-fossil fuel sources five years ahead of the timeline set in its NDC (India 2026b).
8. As of 2024
9. As of 2021

1. Introduction

A decade after the Paris Agreement, adopted in 2015 and hailed as the world's most ambitious climate commitment to limit warming to 1.5°C above pre-industrial levels, the gap between stated ambition and actual action remains stark. The limited efforts over the years have led to escalating impacts, with the world experiencing, on average, one disaster a day over the past five decades, resulting in daily losses of USD 202 million (Jones 2022).

This climate crisis is likely to worsen further due to evolving geopolitical dynamics that have introduced new uncertainties in the global climate regime. The United States's withdrawal from the Paris Agreement, along with its reversal of domestic climate regulations, shows how political changes can produce rapid and significant policy reversals in the energy transition sphere, raising concerns about accountability and underscoring the fragility of climate cooperation. The war in the West Asia has further halted momentum, pushing climate priorities to the margins of international politics.

Despite these geopolitical uncertainties, the obligation to deliver on climate commitments remains, as the consequences of inaction compound each year. To achieve the goals of the Paris Agreement, countries have been communicating their targets through Nationally Determined Contributions (NDCs). Previously, they set targets for 2030; and last year, they were expected to submit more ambitious targets for 2035 as part of NDC 3.0, informed by the outcomes of the first Global Stocktake.[10]

However, a few questions remain. How are countries performing on their commitments? Which countries in the negotiating groups are on track, and which are falling short? What is the collective progress of these negotiating groups under the United Nations Framework Convention on Climate Change (UNFCCC)? This analysis is important, as these groups influence the direction and effectiveness of global climate governance by building internal coherence, setting the agenda, and holding other groups accountable. While the countries in these groups often have diverse national climate policies, they tend to align strategically within the UNFCCC process to strengthen their collective bargaining power and advance shared interests in climate negotiations.

10. The Global Stocktake examines the world's collective efforts to meet the goals of the Paris Agreement.

Flooding in eastern São Paulo following the overflow of the Aricanduva stream.

Image: iStock

In this regard, we assess the climate performance of the following key negotiating groups:

- The Umbrella consists of Australia, Canada, Iceland, Israel, Japan, Kazakhstan, New Zealand, Norway, Ukraine, the United States, and the United Kingdom
- The EU (27), consisting of the European Union's 27 member states
- The Environmental Integrity Group (EIG) includes Georgia, Mexico, Liechtenstein, Monaco, South Korea and Switzerland.
- The BASIC, which is Brazil, China, India, and South Africa

We did not include other negotiating groups,[11] as they submit at their discretion or due to limited data availability across member countries.

We examine progress against national climate commitments to understand each group's collective progress. For this, we mainly draw on datasets reported by countries in the first Biennial Transparency Reports (BTRs),[12] including data from Common Reporting Tables (CRT)[13] and the Common Tabular Format (CTF),[14] in line with the requirements of the Enhanced Transparency Framework (ETF).

In Section 2, we examine historical emissions trends and assess how emission trajectories have evolved in the pre-Paris (2009–15) and post-Paris (2016–22) eras. Next, we evaluate progress against the 2030 and 2035 NDC targets. In Section 4, we analyse the implications of these emissions pathways for achieving net-zero goals. Finally, we conclude this issue brief in Section 5.

11. These groups include small island developing states and least developed countries.
12. The BTR include information on national inventory reports (NIR), progress towards NDCs, policies and measures, climate change impacts and adaptation, levels of financial, technology development and transfer and capacity-building support, capacity-building needs and areas of improvement, with the first submission was due by 31 December 2024.
13. The CRT contains information of anthropogenic emissions by sources and removals by sinks of greenhouse gases.
14. The CTF (NDC) contains the information necessary to track progress in implementing and achieving NDCs.

2. Emissions before and after the Paris Agreement

Emissions reduction is a central topic of climate debate, and the Global North is expected to make steeper reductions than the Global South. However, at present, there is limited understanding of emissions trends before and after the adoption of the Paris Agreement.

For this analysis, we define the post-Paris era as 2016–22, a timeframe that follows the adoption of the Paris Agreement and aligns with the latest available data. For consistency, we define the pre-Paris era as 2009–15.

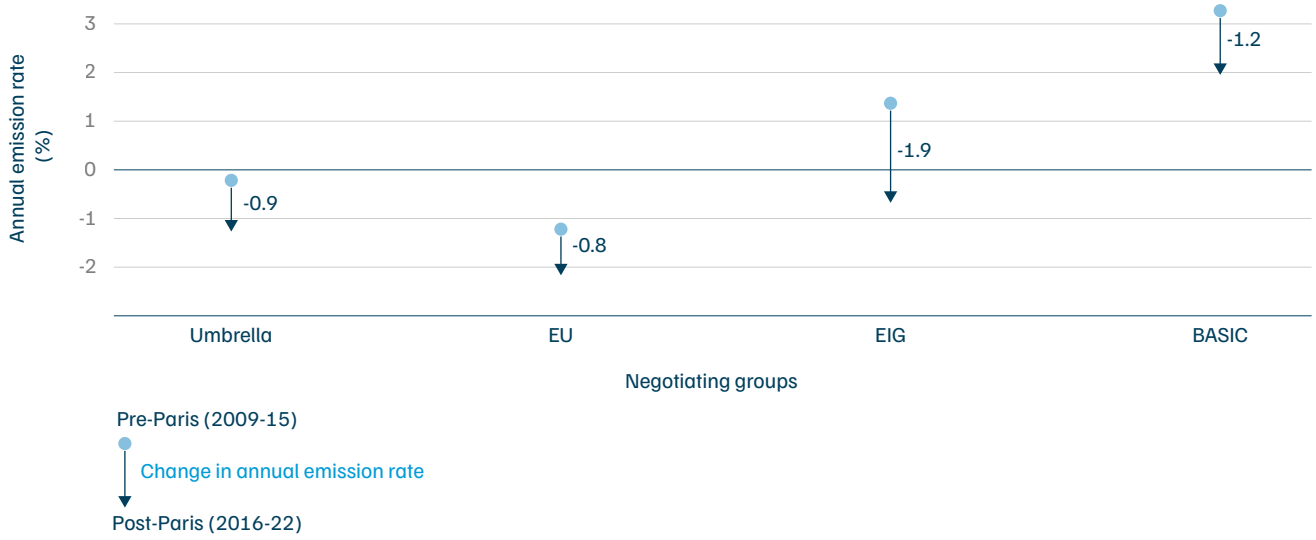
Based on the emissions[15] self-reported by countries, we observe that during 2009–22, the BASIC group collectively accounted for more than half of the total emissions (52 per cent) among the groups studied, followed by the Umbrella group (32 per cent), the EU (11 per cent), and the EIG (5 per cent). Within the BASIC, China accounted for 74 per cent of its group's emissions, while in the Umbrella Group, the US accounted for 63 per cent of its group's emissions.

Figure 1 compares the annual emission rates[16] of the negotiating groups in the pre-Paris (2009–15) and post-Paris (2016–22) eras, showing that all groups had annually decreased emission rates in the post-Paris era.

Among them, the EIG has seen a notable shift, from an annual increase in emission rates by 1.4 per cent in the pre-Paris era to a decrease of about –0.5 per cent in the post-Paris era. The BASIC group also shows a significant shift, as its annual emissions growth rate reduced from 3.3 per cent pre-Paris to 2.1 per cent post-Paris, with India showing signs of progressive decoupling.[17] In addition, both the Umbrella and the EU have shown an increase in the reduction in their annual emission rates, from –0.2 per cent to –1.1 per cent, and from –1.2 per cent to –2 per cent, from the pre-Paris to the post-Paris era, respectively.

Further, the BASIC group emitted 8.5 $GtCO_2e$ less by not following the pre-Paris trends in the post-Paris era.[18] This is equivalent to more than 10 per cent of global emissions in 2022.[19] On the other hand, the Umbrella, the EU, and the EIG reduced emissions by only 3.7 $GtCO_2e$ by not following the pre-Paris trends in the post-Paris era.

Figure 1. Annual emission rates decline in the post-Paris era



Source: Authors' analysis.

15. For analysis of the trends in both pre- and post-Paris eras, we considered emissions without land use, land-use change, and forestry (LULUCF).
16. We derived group emissions by aggregating the emissions of all countries within a group; then we assessed annual emissions rates. Note that during 2009–22, major events, such as the financial crisis in 2008 and the COVID-19 pandemic in 2020, could have significantly influenced emission trends.
17. As reported in the India's BTR, while absolute emissions have increased, the emissions intensity of GDP has consistently declined, reflecting a progressive decoupling of economic growth from GHG emissions (India 2026b).
18. We used pre-Paris emission rates to derive the post-Paris projected emissions trajectory, which we then assessed against actual cumulative emissions of the post-Paris values.
19. In 2022, the global emissions were 52 $GtCO_2e$ without LULUCF, as estimated by the Emissions Database for Global Atmospheric Research.

3. Are countries projected to achieve their climate commitments?

The countries within the negotiating groups had submitted their climate targets primarily for 2030. More recently, they have also begun communicating updated targets – NDC 3.0 – signalling the next phase of ambition until 2035. However, it remains to be seen whether they are on track to achieve these targets.

These climate commitments take various forms. Mostly, economy-wide emission-reduction targets were set by the Umbrella, the EU, and the EIG. The BASIC countries have set varied targets in their NDCs, including emissions intensity, emissions peaking, carbon sink creation, and expansion of non-fossil-fuel energy capacity, among others.

In their official reports, these countries provide data on projected emissions and indicators[20] related to NDCs. To reflect on the progress of countries within the Umbrella, the EU, and the EIG, we analysed their projected emissions[21] against their NDC targets. Given the varied nature of NDCs, we used indicators to assess the BASIC group's current progress.[22]

3.1 Assessing where the countries within the Umbrella, the EU, and the EIG stand

Countries in the Umbrella, the EU, and the EIG have adopted diverse climate target levels in their NDCs. Meanwhile, the EU has collectively adopted a single NDC, reflecting a collaborative approach to climate action across its 27 member countries. Table 1 shows how countries within these groups are aligning with their targets based on their projected emissions.

Image: Unsplash

Action should be grounded in scientific evidence.

20. Indicators are measurable metrics defined by each country to track its progress towards achieving its climate commitments.
21. Projected emissions are considered as per the target's scope and coverage. The CTF contains the information necessary to track progress in implementing and achieving NDCs. For this analysis, projections with additional measures reported in Table 8 were considered; where such data was unavailable, we used projections with measures from Table 7.
22. Projections against the indicators were not reported.

Table 1. Only a few countries in the Umbrella, the EU, and EIG are projected to meet their 2030 and 2035 targets

	2030		2035	
Countries	**Target (%)**	**Projected reduction (%)**	**Target (%)**	**Projected reduction (%)**
Umbrella group				
Australia	−43	−42	_	_
Canada	−40	−29	−45	_
Iceland	−41	33	−50	21
Israel	−27	−26	_	_
Japan	−46	−45	−60	_
Kazakhstan	−15	−16	−17	−21
New Zealand	−50	−37	−51	−52
Norway	−55	−62	−70	−68
Ukraine	−65	−81	−65	−82
United States	−50	−46	−61	−57
United Kingdom	−68	−60	−81	−63
EU	**−55**	**−51**	**−66.25**	**−59**
EIG				
Georgia	−47	−66	−50	−68
Liechtenstein	−55	−47	−68	−59
Monaco	−55	−47	−67.6	−60
South Korea	−40	4	−53	6
Switzerland	−50	−31	_	_

Source: Authors' analysis.

The targets are taken from the countries' respective NDCs. Red represents projected emissions that are not aligned with their target, while green represents those aligned with their targets. Blue represents an increase in projected emissions rather than a reduction as per the target.

Note:
*Mexico is not included in the EIG group since it has no projections in the CTF tables.
*Australia and Switzerland's 2035 targets are expressed as an emissions budget; however, we do not assess them here due to the lack of projections for 2031–2035.
*Canada and Japan's projections for 2035 are not reported in the CTF tables.
*Israel is not included as it has not submitted its 2035 target.

We observed that Kazakhstan, Georgia, and Ukraine[23] are projected to meet both their 2030 and 2035 targets. Norway is projected to only meet its 2030 target, whereas New Zealand is projected to meet its 2035 commitment. Other countries, such as Iceland in the Umbrella group and South Korea in the EIG, are projected to increase emissions rather than meet their 2030 and 2035 reduction targets.

Collectively, the Umbrella, the EU, and the EIG are projected to emit 9 per cent more in 2030 than their NDC target levels. For their 2035 target, this is projected to increase to 19 per cent.[24]

Given that many countries are at different stages of meeting their 2030 targets, they need to significantly increase their annual emissions reduction in comparison to reductions achieved before 2022 (between the base year and 2022). For example, within the Umbrella group, the UK would need to more than double its annual emissions reduction rate to 5.4 per cent after 2022, compared to the pre-2022 rate. Similarly, the US and Canada would need to increase their yearly emissions reduction rates by 5 per cent and 6 per cent, respectively, after 2022, compared to their earlier rate. This also holds for the EU, which needs to reduce emissions by 4.8 per cent annually after 2022 – almost four times its earlier rate.

3.2 Assessing the current progress of the BASIC group towards its commitments

Countries in the BASIC group have diverse national circumstances and reporting capabilities. Their climate commitments reflect different pathways towards emissions reduction. Given their limited reported data,[25] we analysed their current progress against the self-reported NDC indicators[26] for 2030 commitments.

Image: iStock

23. Ukraine has increased its reduction target from 65 per cent in GHG emissions by 2030 to over 65 per cent by 2035, relative to 1990 levels.
24. Mexico, Canada, and Japan are excluded due to the absence of 2035 projections in the CTF; Australia and Switzerland's 2035 targets, expressed as emissions budgets, are not assessed owing to the lack of 2031–2035 projections; and Israel is excluded as it has not submitted a 2035 target.
25. Although BASIC countries have submitted their 2035 commitments, available indicators only track their 2030 targets. In addition, they have used flexibilities and did not report projections of indicators (as reflected in Table 10 of the CTF).
26. These are measurable metrics defined by countries to track their progress towards their climate commitments.

Table 2. The BASIC countries show varying levels of alignment with their 2030 commitments

Countries	Target	Indicators	Status
Brazil	• Achieve a reduction of 48.4% and 53.1% by 2025 and 2030, respectively, compared to net greenhouse gas (GHG) emissions in 2005 (Brazil 2023)	Reduced GHG emissions (Brazil 2024)	Emissions were 20.4% below 2005 levels as of 2022 (Brazil 2024)
China	• Peak CO_2 emissions before 2030 • Achieve carbon neutrality before 2060 • Reduce the CO_2 intensity of GDP by over 65% from 2005 levels • Increase non-fossil-fuel share in primary energy consumption to ~25% • Increase forest stock by 6 billion m^3 from 2005 • Bring the total installed capacity of wind and solar power to over 1.2 billion kilowatts by 2030 (China 2024b)	Reduced energy-related CO_2 emissions per GDP (China 2024a)	Reduced by 50.9% from 2005 levels (as of 2021) (China 2024a)
		Increased forest stock volume (China 2024a)	Achieved ahead of schedule (as of 2021) (China 2024a)
		Share of non-fossil fuels in total energy consumption (China 2024a)	Share reached 17.9% (as of 2023) (China 2024a)
		Total installed wind and solar power capacity (China 2024a)	Achieved ahead of schedule (as of 2024) (China 2024a)
India	• Reduce the emissions intensity of GDP by 45% from 2005 levels • Source 50% of the cumulative electric power installed capacity from non-fossil-fuel-based energy resources • Create an additional carbon sink of 2.5–3 billion tCO_2e (India 2022)	Reduced emissions intensity of GDP (India 2026)	Reduced by 37.38% as of 2022 (India 2026a)
		Cumulative installed electricity capacity from non-fossil-fuel-based energy resources (India 2026)	Achieved ahead of schedule[27]
		Creation of additional carbon sinks (India 2026)	2.44 billion tCO_2e created as of 2022 (India 2026a)
South Africa	• Reduce GHG emissions to 398–510 $MtCO_2e$ by 2025, and to 350-420 $MtCO_2e$ by 2030 (South Africa 2024a)	Total annual national GHG emissions and removals, including LULUCF and excluding GHG emissions from natural disturbances (South Africa 2024b)	Emissions were 394.3 $MtCO_2e$ as of 2022 (South Africa 2024b)

Source: Authors' analysis.

Note: LULUCF - Land Use, Land-Use Change, and Forestry

27. While India reported in CTF Table 4.2 that non-fossil-fuel-based energy resources accounted for 42.5 per cent of its installed electric power capacity in 2022, but in the BTR, it is indicated that India achieved the target of sourcing 50 per cent of its installed electricity capacity from non-fossil fuel sources five years ahead of the timeline set in its NDC (India 2026b).

Table 2 demonstrates that countries in the BASIC group have varying levels of alignment toward their 2030 targets. India shows significant progress, having already exceeded 50 per cent of its cumulative installed electric power capacity from non-fossil fuel sources, and is on track to exceed its target of reducing the emissions intensity of its GDP by 45 per cent by 2030 (Das et al. 2025). Further, it has created an additional carbon sink of 2.44 billion tonnes of CO_2e, moving further towards its target of sequestering 2.5–3 billion tonnes of CO_2e by 2030.

Similarly, China[28] has made substantial progress, already exceeding its target of raising the total installed capacity of wind and solar power to over 1,200 GW by 2030,[29] and of increasing forest stock volume by 6 billion m^3 by 2030[30] from 2005. It has reduced energy-related CO_2 emissions per unit of GDP by about 50.9 per cent[31] relative to 2005 levels, compared to its 2030 reduction target of 65 per cent (People's Republic of China 2024). In its energy mix, non-fossil fuels accounted for 17.9 per cent.[32]

Also, South Africa seems to be aligning with its target, since its national GHG emissions and removals in 2022 are within its target level. In contrast, Brazil achieved a 20.4 per cent reduction the same year; its 2030 reduction target is 53.1 per cent.

Image: Emotive Lens / CEEW

Rooftop solar, Uttarakhand, India.

28. As per the CTF Table 4.1, another indicator shows that CO_2 emissions from fuel combustion, industrial processes, and product use had not peaked as of 2021.
29. As of October 2024
30. As of 2021
31. As of 2021
32. As of 2023

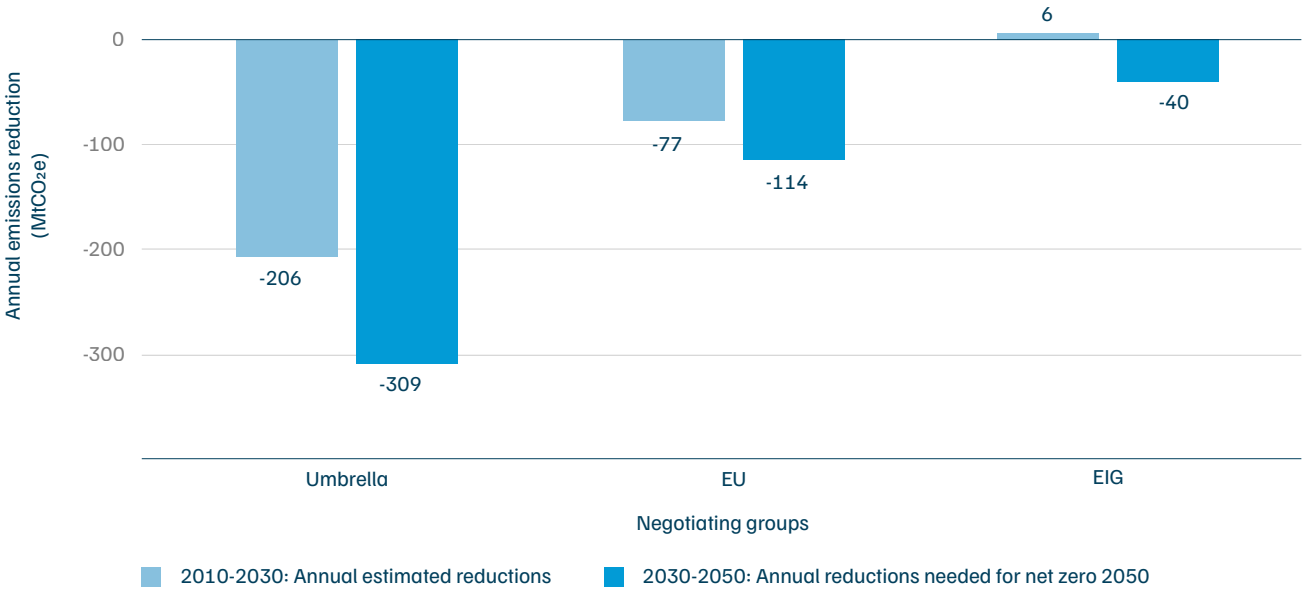
4. What are the implications for net zero?

Achieving the 1.5°C goal requires countries to rapidly reduce emissions and achieve net zero by the middle of the century. Around 145 countries have announced or are considering net-zero targets, which collectively represent about 77 per cent of global emissions (Climate Action Tracker 2024). However, this growing convergence in ambition raises a critical question: Is net zero by 2050 achievable?

This can be better understood by examining their annual emissions reductions in relation to the pace required to achieve net zero by 2050. For this analysis, we considered self-reported projections for 2030. Given the limited data on the projections of the BASIC group, our analysis only covers the Umbrella, the EU, and the EIG.[33]

As Figure 2 shows, all three groups need to significantly increase their annual emission reduction after 2030 to achieve net zero by 2050. Within the Umbrella, the United States, followed by Japan and Canada, would need to significantly increase its emissions reductions after 2030, and in the EIG, South Korea would also need to follow a similar path.

Figure 2. Negotiating groups rely on after 2030 reductions to achieve net zero by 2050



Source: Authors' analysis.

5. Conclusion

There is a growing disconnect between stated climate ambition in NDCs and projected implementation, particularly among the Umbrella, the EU, and the EIG groups. Emissions trajectories portrayed in BTRs clearly indicate that the major countries in these negotiating groups are not aligned to meet their mitigation targets for both 2030 and 2035. In contrast, the BASIC countries are more aligned with their 2030 commitments despite their lower historical responsibility and greater developmental constraints. As the climate debate progresses in this dynamic geopolitical context, opportunities should be explored to strengthen and align 2035 NDC targets with accelerated short-term action to prevent the projected overshoot and ensure credible implementation.

33. Mexico is excluded due to no projections of 2030 in CTF.

Acronyms

BTR	Biennial Transparency Report
CRT	Common Reporting Tables
CTF	Common Tabular Formats
EIG	Environmental Integrity Group
ETF	Enhanced Transparency Framework
EU	European Union
LULUCF	Land Use, Land-Use Change, and Forestry
NDC	Nationally Determined Contribution
NDC 3.0	Third Round of Nationally Determined Contributions
UK	United Kingdom
US	United States

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The authors

Simran Sukhija | simran.sukhija@ceew.in

Simran is a Programme Associate with Climate Negotiations at The Council. Her work focuses on analysing evolving international climate policies and UNFCCC negotiations, including conducting assessments through the Capacity Building Tool aligned with the Enhanced Transparency Framework. Her research also spans climate accountability, NDCs, unilateral measures, just transition, and others.

Sumit Prasad | sumit.prasad@ceew.in

Sumit leads Climate Negotiations at The Council. He has about a decade of experience in the climate space with a core focus on enhancing transparency and accountability of climate action in the international climate regime. He has been appointed as a roster group of experts to UNFCCC by the Ministry of Environment, Forest and Climate Change.

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Council on Energy, Environment and Water (CEEW)
ISID Campus, 4 Vasant Kunj Institutional Area
New Delhi – 110070, India
T: +91 (0) 11 4073 3300
info@ceew.in | ceew.in | @CEEWIndia | @ceewindia

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