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On behalf of:
Federal Ministry for Economic Affairs and Energy

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Energy in China Newsletter

Bimonthly news on China's latest regulatory, technological and industrial development in energy sector
A service of the Energy Sector in GIZ China

Dear readers,

It is summer in Beijing, the season of bright and humid days and thundershowers at night. Power outages and supply shortfalls have strained grids worldwide over the past year, and China has been no exception, both last winter and in May in Guangdong, and China electricity demand has risen sharply. This year has also been crowded with policy developments, as China's various government ministries and provinces assemble and fill in plans to peak carbon by 2030 and hit carbon neutrality by 2060. The Carbon ETS is expected to begin trading in July (delayed from June), and work is now underway on adding new sectors on top of the power sector.

On the energy transition front, China's electric vehicle market is really taking off, and could potentially double sales numbers this year versus 2020. This time, the driver is new models and consumer interest, not subsidies and quotas. On renewables, solar markets have taken a hit from higher materials prices and the elimination of subsidized feed-in tariffs, though the residential market remains strong, and new GW of PV manufacturing capacity continues to come online in China.

The Sino-German Energy Partnership and its Energy Transition component have kept busy this summer, in June holding events for launching new reports in Beijing, in Taicang for kicking off Sino-German Energy Efficiency and Climate Network, and in Shanghai for releasing new heat pump standards jointly developed between China and Germany. Read on for more details about these developments.

Kind Regards,
Yuxia Yin and Anders Hove
and the energy team at GIZ China

RENEWABLE ENERGY

» County-level rooftop distributed pilots to get underway
» 2021 renewable feed-in tariffs officially phase out for most PV and wind

GRID, ENERGY STORAGE & CONSUMPTION

» Guangdong government orders industry to reduce consumption due to power shortage in May
» China electric vehicle sales surge in 1H 2021, full-year sales could roughly double

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» 50 major energy corporations launched Suzhou Initiative on promoting a clean energy transition
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CHINA IN THE WORLD

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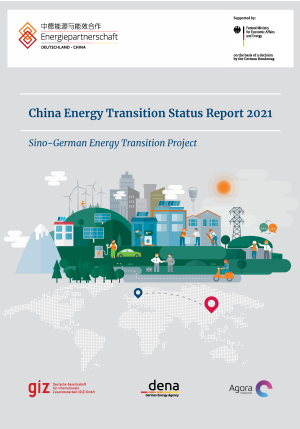
Project News

The GIZ energy team hosts forum in Beijing on energy sector carbon peaking and carbon neutrality

GIZ publishes China Energy Transition Status report 2021

On 16 June, the energy team of GIZ in China organized a Sino-German exchange forum on decarbonisation of the energy sector in the context of carbon peaking and carbon neutrality goals. The event provided an opportunity for sharing experiences, challenges, opportunities, and potentials for cooperation between Germany and China while accelerating the energy transition in both countries.



China Energy Transition Status 2021 Report

One of the event's highlights was the launch of the China Energy Transition Status 2021 (in English) by the Sino-German Energy Transition Project. The report's **highlights** include:

• An overview of Chinese energy transition policy
• Key Energy Transition Statistics in 2020
• The recent developments and trends in China's fossil energy, renewable energy, power market reform, new energy vehicle, hydrogen, carbon market and air quality

The Sino-German Energy Transition project, commissioned by BMWi, implemented by GIZ in cooperation with dena and Agora Energiewende drafted and published the report. The report aims at summarizing for an international audience some selected aspects of the energy transition underway in China. **Click here to download the report**.

Read more

Sino-German Energy Efficiency and

About the projects

The Sino-German Energy Partnership is the central platform for energy policy dialogue between Germany and China on national level. It aims at accelerating the energy transition in the two countries by continuous political, economic, regulatory and technological exchange with focuses on energy efficiency and renewable energies. Furthermore, the Energy Partnership provides a platform for fostering private sector cooperation. As part of the Energy Partnership, the Sino-German Energy Transition project focuses on supporting research cooperation between German and Chinese think tanks on all aspects of the low-carbon energy transition. On behalf of the Federal Ministry for Economic Affairs and Energy (BMWi), Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH implements the Sino-German Energy Partnership (EP) and has established offices in Beijing and Berlin serving as an information platform and point of contact for all involved and interested parties. On the Chinese side, the Energy Partnership is chaired by the National Development and Reform Commission (NDRC) and the National Energy Administration (NEA).

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Climate Network kicked off in Taicang in June

On June 25, the Sino-German Energy Partnership and the administrative committee of the Taicang High-Tech Industrial Development Zone officially kicked off the Sino-German Energy Efficiency and Climate Network. The network aims to promote the exchange on energy saving and carbon reduction among enterprises by introducing the management and organization model of the German Energy Efficiency Network (EEN), and to support the establishment and operation of EEN in Taicang High-tech Industrial Development Zone and summarize the results and experiences as replicable references to showcase that EEN can be an innovative energy service instrument for energy saving in China. This shall effectively contribute to the national climate goal of CO2 peaking and CO2 neutrality in China.

The Sino-German Energy Efficiency and Climate Network in Taicang High-Tech Development Zone will integrate German experience and technical solutions to help the selected companies to save energy and reduce energy consumption through various exchange workshops/seminars, training, energy efficiency diagnoses. Cooperation topics include energy efficiency planning, self-generation and use of photovoltaics, air conditioning, and refrigeration.

Yin Yuxia, project director of the Sino-German Energy Partnership, signing the Letter of Intent for cooperation on Energy Efficiency Networks on behalf of GIZ with the administrative committee of the Taicang High-tech Industrial Development Zone, Jiangsu Province, source: Taicang High Tech Zone

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China

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Upcoming events

July 28: Sino-German Conference on Industrial Decarbonization and Energy Conservation in the Pulp and Paper Industry

The conference aims at disseminating and spreading state-of-the-art energy efficiency and decarbonization solutions in China's energy-intensive sectors, in particular, the pulp and paper industry, and connecting German and Chinese decision-makers from politics and industry alike. This event brings together more than 100 decision-makers from Chinese and German industry both virtually and physically in Beijing. A highlight will be the launch of a technical guideline on energy efficiency solutions for the pulp and paper industry developed in the framework of the Sino-German Energy Partnership between BMWi and NDRC and the project "Supporting Low Carbon Development in Jiangsu Province Phase III" funded by the German Ministry for the Environment (BMU) and implemented in cooperation with the Jiangsu Department for Ecology and Environment. German companies have a chance to present their solutions to a Chinese expert audience.

For more information and to participate, please contact Mr. Maximilian Ryssel (maximilian.ryssel@giz.de).

Sino-German cooperation promotes heat pump technology in

China

Standard on air-sourced heat pump development launched

On 27 June, China Energy Conservation Association (CECA) launched a new industrial association standard on hybrid systems combining air-source heat pumps and gas boilers. The standard will promote the standardization of design, construction and validation of energy-saving home comfort systems for heating. The standard will also help regulate industry development and enhance the quality development of heat pump technologies.

GIZ participated and involved German companies in the drafting of the standard, under the framework of the Sino-German Energy Partnership, so that the resulting association standard incorporates German best practices and experiences on heat pump standards. The resulting standard is not only high quality, but also facilitates the introduction of German and European heat pump products into the Chinese market. GIZ will follow up with companies and evaluate the new standard's effect on their heat pump business.

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Energy policy, reform & general

NDRC will continue energy price reform during the 14th Five-Year Plan period

NDRC recently issued an Action Plan on Deepening Pricing Reform in the 14th Five-Year plan period. In the energy sector, NDRC will continue transmission and distribution (T&D) price reforms as well as market-oriented reforms for coal, gas, hydro, and nuclear power prices. The NDRC also plans to establish a new pricing policy for wind, solar, pumped hydro storage, and battery energy storage, and encourages more energy users to participate in the power market. The plan calls for the full implementation of residential ladder pricing (in which the highest 20% of electricity consuming households pay a higher volumetric rate) and pricing disincentives for high energy consumption and high emission industries.

- **Source:**
  "关于"十四五"时期深化价格机制改革行动方案的通知, 发改价格[2021]689号" National Development and Reform Commission, 18 May 2021, at https://www.ndrc.gov.cn/xwdt/tzgg/202105/t20210525_1280786.html.

State Council delays the launch of national carbon emission trading system (ETS) to July

During the standing meeting on 7 July, State Council announced the new timetable for the launch of the nationwide ETS—it will come online in July[1]. This is in contrast to the end-of-June start date announced in May by MEE[2]. Government officials cited procedural and technical reasons and stated all relevant works are still in progress.[3]

The national carbon market will first include 2,225 key emission companies in the power generation

sector, totaling about 4 gigatons of carbon emission, which is 40% of the national total. Once launched, the China national ETS will be the largest-scale carbon market in the world in terms of greenhouse gas emission covered. However, industry experts still fear that the number of companies included is too small to test the soundness of trading mechanisms and rules for future adjustments. Additionally, the small number could lead to a surplus of quotas, making it difficult to rationalise market carbon price and consequently discourage enterprise participation.[4]

MEE also plans to include eight industries in the carbon market during the 14th Five-Year-Plan period. These industries include power, petrochemical, building, steel, pulp and paper and so on.[5] However, officials from these industries expressed difficulty in preparing for the carbon emission trading. China Steel Association, for one, highlighted that under MEE's urgent timeline, it is difficult to clarify the emission baseline of all enterprises in the steel industry, therefore hard to complete allocation. The steel industry is also lacking a decarbonising roadmap at the entity level, and the cost of upgrading the production chain is high.[6]

- **Sources:**

[1] "国务院常务会：7月启动发电行业全国碳排放权交易市场上线交易," People.cn, 7 July, at http://finance.people.com.cn/GB/n1/2021/0707/c1004-32151555.html.

[2] "生态环境部：拟于今年6月底前启动全国碳市场上线交易," CN Stock News, 26 May 2021, at http://news.cnstock.com/news,bwkx-202105-4708693.htm.

[3] "全国碳市场7月"开锣"，中国减碳"大棋局"再落一子," Beijixing News, 8 July 2021, at https://baijiahao.baidu.com/s?id=1704684315500636179&wfr=spider&for=pc.

[4] "全国碳市场延后开跑，合理碳价、控排目标、企业承受力待解," Economic Observer News, 2 July 2021, at http://www.eeo.com.cn/2021/0702/493580.shtml.

[5] "生态环境部环境影响评价与排放管理司有关负责人就《关于加强高耗能、高排放建设项目生态环境源头防控的指导意见》答记者问," Ministry of Ecology and Environment, 2 June 2021, at http://www.mee.gov.cn/ywdt/zbft/202106/t20210602_835912.shtml.

[6] "全国碳市场延后开跑，合理碳价、控排目标、企业承受力待解," Economic Observer News, 2 July 2021, at http://www.eeo.com.cn/2021/0702/493580.shtml.

Four ministries call for integration of renewable energy with data centres

The NDRC together with three other ministries issued a plan regarding integration of renewable energy with data centres. The plan encourages data centres to pair with renewable energy power plants and participate in renewable electricity market trading, as well as employing other ways to integrate renewable energy. The policy encourages direct supply of renewable energy for large users, building dedicated lines to renewable plants, and adding distributed PV and storage. Data centres in regions with rich renewable resources such as Guizhou, Inner Mongolia, Gansu, and Ningxia should increase their renewable utilisation rate and the quality of computing service.

- **Source:**
"关于印发《全国一体化大数据中心协同创新体系算力枢纽实施方案》的通知. 发改高技[2021]709号," National Development and Reform Commission, 24 May 2021, at http://www.gov.cn/zhengce/zhengceku/2021-05/26/content_5612405.htm.

Chinese government releases new plan for 5G in the energy sector

On June 7, China's National Development and Reform Commission (NDRC), the National Energy Administration, Cyberspace Administration of China (CAC) and Ministry of Industry and Information Technology jointly released an Implementation Plan for 5G Applications in the Energy Sector. Concrete goals for the upcoming 3-5 years include exploring 5G applications in power plants, transmission and grids, coal mining, integrated energy, manufacturing, and buildings; introducing new standards, building new infrastructure, and improving security.

- **Source:**
  „关于印发《能源领域5G应用实施方案》的通知," NDRC, 7 June 2021, at https://www.ndrc.gov.cn/xxgk/zcfb/tz/202106/t20210611_1283163.html.

China takes stock on CCUS projects for better project planning as next step

On 17 June, China's National Development and Reform Commission (NDRC) requested that local regions and state-owned enterprises submit information on existing Carbon Capture, Utilization, and Storage (CCUS) projects. The submission should contain basic information such as industries involved, technology, carbon storage capacity economics, as well as environmental and societal impact. The information gathering effort will support follow-up projects and China's goal of carbon peaking and carbon neutrality. CCUS is considered crucial for hard-to-decarbonize sectors in industry.

- **Source:**
  "国家发展改革委办公厅关于请报送二氧化碳捕集利用与封存（CCUS）项目有关情况的通知," NDRC, 17 June 2021, at https://www.ndrc.gov.cn/xwdt/tzgg/202106/t20210623_1283822_ext.html.

Renewable energy

County-level rooftop distributed pilots to get underway

According to a new notice from the National Energy Administration, counties can now apply to become rooftop solar PV pilots.[1] The notice lists several criteria for applying to be a pilot county, including ample rooftop resources, ample local electricity consumption, and high daytime electricity load. Public buildings in the applicant counties should have more than 40% of total roof area suitable for installing solar PV, and village residential buildings more than 20%. Grid companies will guarantee grid connection and consumption for the rooftop solar PV installed. However, the notice does not mention any subsidies from the central government, but rather encourages local governments to devise their own financial support plans.

The China Photovoltaic Industry Association (CPIA) highlighted it could be difficult for most counties to meet all of the criteria set out in the notice, but if this new NEA policy results in trading in rooftop

solar electricity, that would "unleash a wave of distributed solar."[2] Several solar companies reacted to the notice: Trina Solar noted it could supply county pilots with both PV products and smart energy solutions.[3] The State Power Investment Corporation (SPIC) noted its subsidiaries it would be involved in distributed PV pilots, and has selected 22 subsidiaries to make applications for their respective counties.[4]

- **Sources:**

  [1] "国家能源局：《关于报送整县（市、区）屋顶分布式光伏开发试点方案的通知》," National Energy Administration, 20 June 2021, at http://www.chic.org.cn/home/Index/detail1?id=1100.

  [2] "中国光伏行业协会解读分布式整县推进政策," China Photovoltaic Industry Association, 28 June 2021, at https://baijiahao.baidu.com/s?id=1703598489784363559&wfr=spider&for=pc.

  [3] "天合光能|分布式光伏整县推进全场景解决方案提供商," Solar.IN-EN.com, 2 July 2021, at https://msolar.in-en.com/html/solar-2379516.shtml.

  [4] "国家电投中电国际启动整县推进分布式光伏试点," China Power International Development Limited, 24 June 2021, at http://www.solarpwr.cn/m.php?id=57728.

2021 renewable feed-in tariffs officially phase out for most PV and wind

From 1 August 2021, new utility-scale solar PV, distributed commercial and industrial solar PV, and onshore wind power project will no longer receive national feed-in tariff (FiT) subsides, according to a long-anticipated policy issued by the National Development and Reform Commission on 7 June. New projects in these fields will receive local benchmark prices for coal-fired power generation, but projects can opt to participate in power markets and receive a market price instead.

- **Source:**
  „关于2021年新能源上网电价政策有关事项的通知," NDRC, 11 June 2021, at https://www.ndrc.gov.cn/xwdt/tzgg/202106/t20210611_1283089.html.

Grid, energy storage & consumption

Guangdong government orders industry to reduce consumption due to power shortage in May

Energy Administration of Guangdong province announced on 21 May that many cities in Guangdong province are experiencing power shortage.[1] The shortage is due to combined effects of several factors. Firstly, Guangdong's economic growth is focused on energy-intensive industrial sectors, resulting in unusually rapid growth in consumption, with few efforts on energy efficiency other than emergency conservation or power cuts at peak times. Secondly, Yunnan province, a major external power supplier to Guangzhou, has been suffering from its own power crunch following months of rare drought which cut hydropower generation, the main source of its electricity. It is also possible that the aluminium plants that were moved to Yunnan for cheaper electricity prices took up much of the hydro electricity there, leading to even lower export.[2] Thirdly, the temperature in May was 4° C higher than usual, resulting in increased cooling load. Although the peak of cooling load often coincides with peak solar periods, Guangdong's lack of distributed solar capacity meant that the

province is not able to use the abundant solar resource for alleviating grid pressure.[3]

Starting from mid-May, many city governments in Guangdong province issued a notice to urge factories to halt production between 7 am and 11 pm, or even shut down for three or more days each week depending on the varying power demand. The Guangdong Energy Administration has also emphasized the need to secure coal supply and gas supply to ensure stable operation of power units during peak hours. Industrial enterprises are expecting a 30% reduction in production volume this year, and delays in fulfilling customer orders.[4]

Sources:

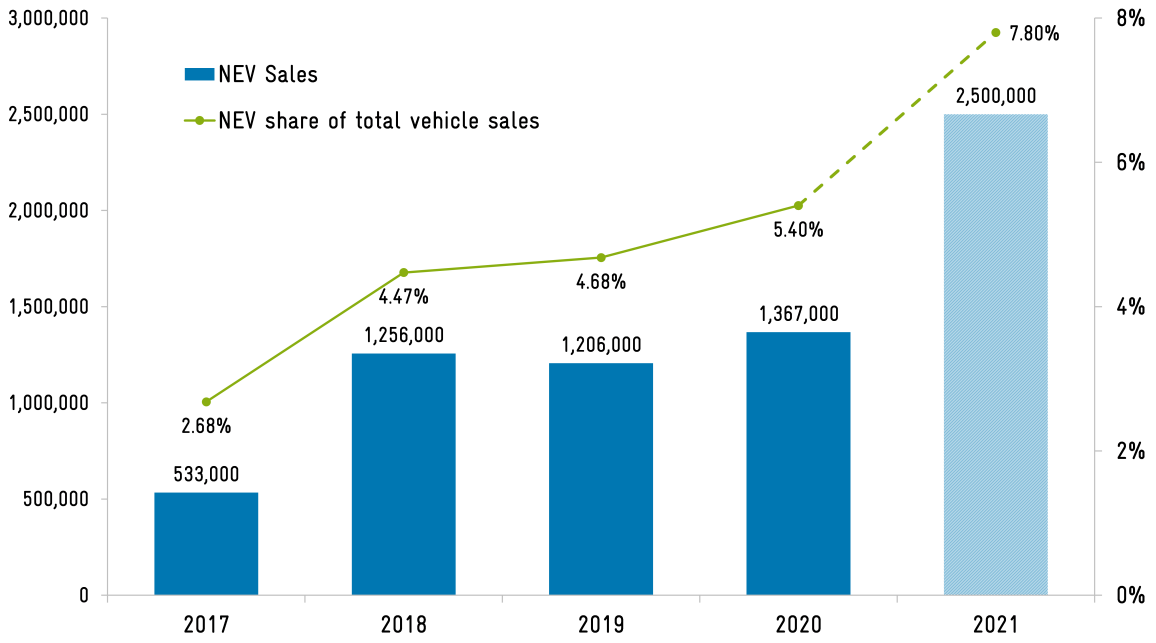
[1] "供电紧张 广东开启错峰用电," China Electric Power Planning & Engineering Association, 26 May 2021, at https://www.ceppea.net/n/i/201076.

[2] "全球最大铝企山东魏桥电解铝产能将转移至云南，云南为何受青睐？" Sohu News, 28 November 2019, at https://www.sohu.com/a/357116499_737497 .

[3] "2020年上半年光伏发电并网运行情况," National Energy Administration, 31 July 2020, at http://www.nea.gov.cn/2020-07/31/c_139254346.htm.

[4] "广东重启错峰用电 政企联动确保电力有序供应," Wangyi News, 27 May 2021, at https://www.163.com/dy/article/GB1H44GF05199NPP.html.

China electric vehicle sales surge in 1H 2021, full-year sales could roughly double



Growth of NEV sales and shares,
Note on assumptions:
NEV full-year market share based on 1H 2021 figure
2.5 million in 2021 is based on CPCA 2.4 million passenger EV forecast plus 100,000 commercial vehicles sold
Sources: CPCA and Electric Vehicle Industry Technology Innovation Strategic Alliance

Sales of new energy vehicles, mostly EVs, more than doubled in the first half of 2021 compared to the prior year, with 1.1 million vehicles registered, compared to around 0.3 million vehicles in the same period the prior year. The NEV share of new registrations reached 7.8%, compared to 5.4% for the full year of 2020. As of June 2021, China has over 6 million NEVs on the road, or 2.06% of total vehicle ownership. 81% of NEVs on the road are pure battery electric vehicles, and the remainder

mainly plug-in hybrids. The China Passenger Car Association (CPCA) revised its full-year forecast for 2021 new energy passenger car sales to 2.4 million in 2021, a 93% increase from the total annual new energy passenger car sales in 2020. Considering that over 120,000 commercial EVs were sold in 2020, total EV sales in 2021 could top 2.5 million.

Subsidies are playing a smaller role in promoting EV sales, after falling 20% at the beginning of 2021. The current EV subsidy now only covers vehicles with range of over 300 km and battery density of over 160 Wh/kg, Despite this, the best-selling EV model during Q1 2021 was the Wuling Hongguang Mini, range of just 120-170 km, responsible for 20% of total sales in that quarter, surpassing Tesla Model 3, the top seller in 2020. This signals ongoing demand from young Chinese urbanities for affordable city cars. Newcomers such as NIO, Xpeng and Singulato have all seen strong growth in the first quarter of 2021.

- **Sources:**

"关于进一步完善新能源汽车推广应用财政补贴政策的通知," State Council, 31 December 2020, at http://www.gov.cn/zhengce/zhengceku/2020-12/31/content_5575906.htm.
"China: Wuling Hong Guang MINI EV Sales Above 26,000," Insideevs, 14 May 2021, at https://insideevs.com/news/507095/china-wuling-hongguang-sales-2021april/.
"公安部交通管理局：2021年上半年新注册登记新能源汽车110.3万辆 创历史新高," Electric Vehicle Industry Technology Innovation Strategic Alliance, 7 July 2021, at https://mp.weixin.qq.com/s/H25ARwiZrEJL3Hn4QdG85g.
Phate Zhang, "Chinese auto association raises NEV sales forecast to 2.4 million units this year," CNEVPOST, 8 June 2021, at https://cnevpost.com/2021/06/08/chinese-auto-association-raises-nev-sales-forecast-to-2-4-million-units-this-year/.
Cai Yuqing, "2020年新能源客车销量占比65.26%,主要以纯电动商用车为主," Qianzhan Industry Research Institute, 18 February 2021, at http://www.elecfans.com/d/1504140.html.

Business

50 major energy corporations launched Suzhou Initiative on promoting a clean energy transition

On 28 June, China's National Energy Administration(NEA) in cooperation with the International Renewable Energy Agency (IRENA) held the 4th International Dialogue on Energy Transition in Suzhou. As the first international energy conference held after China's climate pledge in 2020, the dialogue discussed how to achieve carbon peaking by 2030 and carbon neutrality by 2060, explored how to develop a clean global energy system, and stressed the global nature of cooperation on the green and low carbon transition. At the conference, 50 energy corporations jointly launched the Suzhou Initiative to Accelerate the Low-carbon Energy Transition. This covers a range of Chinese and international dominating energy enterprises: , both conventional and renewable energy, as well as grid companies and electric equipment providers. Major companies joining the initiative include the China National Petroleum Corporation, State Grid Corporation of China, Siemens Energy, Schneider Electric (China), and Electricite De France. The initiative calls for global cooperation to explore concerted to establish an open, fair, transparent, diverse, and regulated energy market to accelerate the global energy transition.

Company representatives jointly signing the Suzhou Initiative, source: IDET2021

- **Source:**
  "国际能源变革对话在苏州开幕 49家企业联合发布《加快能源低碳发展苏州倡议》"，Low Carbon China, 28 June 2021, at http://www.ditan360.com/XiaoYuan/Info-174237.html.

China's big power companies issue carbon peaking plans

China Huadian Group and China Datang Corporation Ltd., two of China's Big Five power generation groups, published their action plans for peaking their carbon emissions in June. In its 13th Five-Year Plan white paper, Huadian Group promises to peak carbon emissions by 2025. China Datang Corporation's newly released action plan states that Datang will peak carbon emissions and achieve carbon neutrality on time—that is, in 2030 and 2060. The other three of the Big Five power companies—State Power Investment Corporation (SPIC), China Energy Investment Corporation (China Energy) and China Huaneng Group—have announced their carbon peak goals for before 2025.

- **Sources:**
  „中国华电公布碳达峰时间表、路线图和施工图", stdaily, 18 June 2021, at http://m.stdaily.com/index/kejixinwen/2021-06/18/content_1157981.shtml.
  „中国大唐发布碳达峰与碳中和行动纲要", Sohu.com, 23 June 2021, at https://www.sohu.com/a/473553468_114731.

China in the world

NEA calls for launch of Belt and Road Energy Partnership Cooperation Network

On 8 June 2021, China's National Energy Administration (NEA) released notice calling for the launch of the Belt and Road Energy Partnership Cooperation Network. This builds on an earlier Belt and Road Energy Partnership in 2019 aimed at strengthening cooperation of the countries participating in the BRI in the energy sector. The NEA will coordinate the cooperation network, which centers on policy exchanges, technical cooperation, and capacity building in fields such as coal, oil and gas, electric power, and new energy, as well as green finance and smart energy. Industry and business officials, financial institutions, and academics are encouraged to participate and submit suggestions.

- **Source:**
  "Notice of Launching the Belt and Road Energy Partnership Cooperation Network," National Energy Administration, 10 June 2021, at http://www.nea.gov.cn/2021-06/10/c_1310000739.htm.

IRENA signs MOUs on China energy and climate cooperation

In the past few months, the International Renewable Energy Agency (IRENA) signed three MoUs with Chinese ministries and companies on cooperation in the energy sector. China joined IRENA in 2014.

On 23 June 2021, the Director-General of Irena, Francesco LaCamera signed an MoU with the Minister of the Ministry of Ecology and Environment (MEE), Mr. Huang Runqiu. According to this MoU, both sides agreed on knowledge exchange, promoting climate finance, and exploring technology innovation in renewable energy.

On 7 June 2021, China's National Energy Administration (NEA) and Irena extended their cooperation with the signing of an MoU that envisions cooperation on clean energy technology and development in developing countries. During the signing ceremony, La Camera noted China's role in driving the global energy transition.

On 12 April 2021, Irena and the State Grid Corporation of China (SGCC) signed an MoU focused on cooperation on grid enhancement, system flexibility, and sector-coupling—which refers to the linking of renewable energy production with consumption in sectors such as industry, transport, and heating or cooling.

- **Sources:**
  "国家能源局与国际可再生能源署签署《中国国家能源局与国际可再生能源署谅解备忘录》", National Energy Administration, accessed at http://www.nea.gov.cn/2021-06/09/c_1310000294.htm.
  "IRENA and China Sign Landmark Cooperation to Address Climate change", IRENA, accessed at https://www.irena.org/newsroom/pressreleases/2021/Jun/IRENA-and-China-Sign-Landmark-Cooperation-to-Address-Climate-Change.
  "IRENA and China State Grid Agree to Advance Transition through Power System Enhancements", IRENA, accessed at https://www.irena.org/newsroom/pressreleases/2021/Apr/IRENA-and-China-State-Grid-Agree-to-Advance-Transition-Through-Power-Systems-Enhancements.

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