

# Energy storage mandatory configuration cancelled

How will the energy storage mandate impact China?

S&P Global estimates that the storage mandate has driven between 50 and 75% of domestic demand. With China accounting for around 56% of the global energy storage demand in 2024, the impact of such a policy change will be massive.

Is the energy storage mandate a big change?

This is a big change towards rationalization of renewables but hidden within that is a removal of the energy storage mandate," George Hilton, research and analysis manager at S&P Global, tells ESS News. S&P Global estimates that the storage mandate has driven between 50 and 75% of domestic demand.

How will China's energy storage policy affect global demand?

"China was on-track to install over 60% of all utility scale storage globally in 2025 and so in the absence of further policy changes, about 45% of global demand has just been wiped away," Hilton says. The ripple effect on the global demand-supply balance will involve further downward pressure on energy storage prices.

Will battery storage reverberate through global supply chain?

S&P Global expects the move to reverberate through the global battery storage supply chain, further driving down prices already at historic lows. From ESS News New renewable energy plants in China will no longer be required to build storage in order to secure development rights and grid connection.

Why is the energy storage industry shrinking?

Under the influence of policy shifts, technological iterations, price competition, and other multiple factors, the energy storage industry continues to show a trend of stronger leading enterprises and shrinking living space for small and medium-sized manufacturers.

How will a new battery energy supply chain affect prices?

S&P Global expects the move to reverberate throughout the global battery energy storage supply chain, further driving down prices that are already at historically low levels. New renewable energy plants in China will no longer be required to build storage in order to secure development rights and grid connection.

After the mandatory ESS integration policy is canceled, the business model of energy storage may change, with PV consumption, ancillary service markets, and peak-valley ...

Under the NASA Aeronautics Research Mission Directorate (ARMD) Convergent Aeronautical Solutions (CAS) project, NASA Glenn Research Center has been leading Multifunctional ...

It is expected that the market share of the top 10 energy storage enterprises will further increase in 2025.

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While domestic policies are undergoing drastic changes, energy ...

Standard for the Installation of Stationary Energy Storage Systems--provides mandatory requirements for, and explanations of, the safety strategies and features of energy storage ...

The rationality of new energy's mandatory allocation of energy storage has been questioned. The industry has repeatedly called for new energy allocation and storage not to be ...

1. Enterprises need to design energy storage configuration strategies in combination with policies to balance short-term fluctuations and long-term benefits. Although the mandatory allocation of ...

With the cancellation of mandatory storage allocation, market attention has shifted to standalone energy storage. However, the economic viability of standalone projects ...

The new policy abolishes the mandatory distribution and storage requirements and explicitly prohibits the use of energy storage configuration as a precondition for project ...

The notice clearly stipulates the cancellation of the mandatory energy storage policy for new energy projects, marking the exit of the administrative energy storage mechanism, which has ...

As the penetration of grid-following renewable energy resources increases, the stability of microgrid deteriorates. Optimizing the configuration and scheduling of grid-forming ...

The example analysis shows that the energy storage configuration scheme can take into account the effect of smoothing fluctuation and economy by adopting the strategy ...

This landmark decision coincides with eight ministries jointly releasing the High-Quality Development Action Plan for New Energy Storage Manufacturing, signaling China's strategic ...

In fact, Document No. 136 only contains one sentence related to energy storage: "It is not allowed to make the configuration of energy storage a prerequisite for the approval, ...

With Document 136 abolishing mandatory energy storage requirements and Document 394 pushing for comprehensive electricity spot market coverage, this policy combo ...

The notice clearly stipulates the cancellation of the mandatory energy storage policy for new energy projects, marking the exit of the administrative energy storage ...

Following the cancellation of the mandatory energy storage policy, the capacity leasing market is inevitably impacted, as new energy stations no longer need to lease ...

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