



# The ICAS Bulletin

## Institute for China America Studies

### A Survey of Scholarship on U.S.-China Relations

April 10, 2024

#### What's Going On? ↓

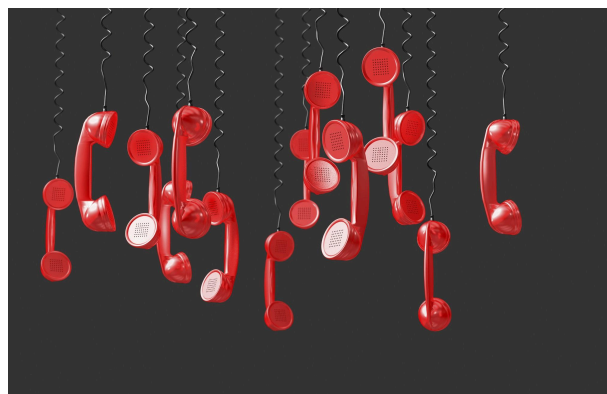
### The Long and the Short of Secretary Janet Yellen's Diplomatic Trip to China



*U.S. Treasury Secretary Janet Yellen shakes hands with Chinese Vice Premier He Lifeng prior to a meeting on April 6, 2024 in Guangzhou, China.  
(Source: Photo by Ken Ishii - Pool/Getty Images)*

- From April 5-9, U.S. Secretary of Treasury Janet Yellen traveled to China to visit American companies in the commercial and manufacturing hub of Guangzhou and then continue discussions with senior Chinese officials in Beijing for two more days.
- Although Secretary Yellen's meetings addressed several topics during her trip – including trade imbalance, drug money laundry, green products – she regularly stressed before, during and after the trip the issue of overcapacity and the U.S. intent to defend its domestic markets from China's excessive import. At one point Yellen advised China to “rethink” its economic growth strategy. Ahead of a meeting with Chinese Vice Premier He Lifeng and other officials, Yellen said the U.S. “seeks a healthy economic relationship with China that benefits both sides” and “a healthy relationship must provide a level playing field.”
- While meeting with Vice Minister He Lifeng, Yellen also warned Beijing of “significant consequences” if China's companies, banks or exporters support Russia's war, to which Beijing responded that “[w]e have never and will never seek gains from the crisis.”
- Aside from issues discussed, Americans and Chinese

### Other Recent Signs of Increased High Level U.S.-China Communications



*(Source: Getty Images, Royalty-Free)*

- According to two senior U.S. officials, U.S. President Joe Biden is set to warn China about its aggressive actions in the South China Sea during a trilateral summit in Washington, D.C. with Japanese Prime Minister Fumio Kishida and Philippine President Ferdinand Marcos Jr.
- After a nearly two-year break, U.S. and Chinese defense officials resumed talks to address unsafe and aggressive military incidents in the Pacific. The discussion, which took place April 3-4 in Hawaii, aimed to ease escalating tensions and improve communication.
- On April 4, China's Vice-Minister of Commerce Wang Shouwen and Under Secretary Marisa Lago of the Department of Commerce led a working group meeting in Washington, D.C. to discuss regulatory transparency, tariffs, and market access, among other issues.
- On April 2, days ahead of two top U.S. diplomatic visits to China, U.S. and Chinese presidents Joe Biden and Xi Jinping held their first phone call since July 2022 during which they discussed a range of issues. In their call, presidents Biden and Xi addressed matters including Taiwan, fentanyl, advancements in AI, and “continued concerns about the PRC's unfair trade policies.” This call

observers were again united in their curiosity about what Secretary Yellen would be eating in China, which Premier Li Qiang made note of in his opening remarks.

- At the end of her visit to China, Yellen concluded that U.S.-China relations is on “more stable footing” but can still be improved upon.
- Chinese leadership, who had shown a warm welcome to Secretary Yellen throughout her trip, said at a press briefing at the end of her trip that the “so-called ‘overcapacity’ is the manifestation of the market mechanism that plays its role” and that “imbalance is often the norm.”

Associated News Sources:

[“Beijing Pushes Back on Overproduction Concerns After Yellen Visit.”](#) *The Wall Street Journal*, April 9 [Paywall]

[“China Says It Has Not, Will Not Seek to Gain From War in Ukraine.”](#) *Bloomberg*, April 8 [Paywall]

[“US will not accept Chinese imports decimating new industries, Yellen says.”](#) *Reuters*, April 8

[“Yellen Sees ‘More Work to Do’ as China Talks End With No Breakthrough.”](#) *The New York Times*, April 8 [Paywall]

[“Culinary diplomacy: The internet is obsessed with what Janet Yellen eats in China.”](#) *AP News*, April 8

[“Yellen calls for level playing field for US workers and firms during China visit.”](#) *ABC News*, April 4

[“Yellen says China’s rapid buildout of its green energy industry ‘distorts global prices’.”](#) *AP News*, March 27

aims to reestablish regular top-level exchanges between the United States and China.

- On March 27, President Xi Jinping met with top American businesspeople and academics in Beijing to reassure them about China’s market amidst ongoing tensions with the U.S., highlighting the health of China's economy and its reliance on international cooperation.

Associated News Sources:

[“Biden to Warn China on South China Sea, Report Claims.”](#) *The Diplomat*, April 8

[“US-Chinese military talks resume on safety in the air and at sea after a nearly 2-year break.”](#) *ABC News*, April 5

[“US raises commercial and market access issues with China in meeting.”](#) *Reuters*, April 4

[“Biden and Xi discuss Taiwan, AI and fentanyl in a push to return to regular leader talks.”](#) *AP News*, April 2

[“China's Xi meets American CEOs in bid to boost confidence in ailing economy.”](#) *NBC News*, March 27

## China-Related Cybersecurity Suspicions Persist in the U.S.



House Hearing Examines China’s Cyber Threat to the United States. From left to right: Commander of the U.S. Cyber Command Army Gen. Paul Nakasone, Jen Easterly, Director of the Homeland Security Department’s Cybersecurity and Infrastructure Security Agency, FBI Director Christopher Wray and Harry Coker Jr., Director of the Office of the National Cyber Director.  
(Source: Photo by Kevin Dietsch/Getty Images)

- Newly released cyberthreat reports from Microsoft Corp. and the U.S. intelligence community highlight China’s rising capability of conducting cyber misinformation campaigns which include a potential disinformation

## The U.S. Pulling in Third Parties to Diversify Markets and Unify Goals



U.S. Secretary of State Antony J. Blinken and European Commission Executive Vice-President Margrethe Vestager participate in a press conference during the EU-US Trade and Technology Council on April 5, 2024.  
(Source: U.S. Department of State, public domain via Flickr)

- The U.S. Commerce Department has officially awarded a USD\$6.6 billion subsidy to Taiwan Semiconductor Manufacturing Co's (TSMC) for establishing an advanced semiconductor production plant in Phoenix, Arizona. The



operation conducted during the Taiwan presidential election in January 2024.

- In early April, the U.S. Cyber Safety Review Board (CSRBR), authorized by President Joe Biden, criticized Microsoft Corp. for its “inadequate security culture” that allowed the Chinese hackers to breach emails in American companies and government officials.

- In late February, U.S. intelligence officials from the FBI, State Department and the Office of National Intelligence reported to about a dozen senators in a classified meeting how Chinese pharmaceutical firm WuXi AppTec had transferred U.S. company's intellectual property to the Chinese government.

- Simultaneously, the U.S. Senate Committee on Homeland Security & Governmental Affairs is working on a bill that could prohibit foreign access to American biotech information on the grounds of national security.

- On March 25, the U.S. Department of Justice indicted Chinese hackers’s cyberattack on European Union members, though European Parliament officials insisted that “our lawmakers were not targeted.”

*Associated News Sources:*

[“China Is Targeting U.S. Voters and Taiwan With AI-Powered Disinformation,”](#) *The Wall Street Journal*, April 5 [Paywall]

[“US government review faults Microsoft for ‘cascade’ of errors that allowed Chinese hackers to breach senior US officials’ emails,”](#) *CNN*, April 2

[“Exclusive: China's WuXi AppTec shared US client's data with Beijing, US intelligence officials told senators,”](#) *Reuters*, March 28

[“China targeted European lawmakers with cyberattacks, Washington says,”](#) *Politico*, March 27

award also includes up to USD\$5 billion in low-interest government loans.

- Defense ministers of the United States, the United Kingdom and Australia said that they are considering adding Japan as a new member to AUKUS—the trilateral security partnership between the three countries for the Indo-Pacific region.

- Around the same time, warships and aircraft from Australia, Japan, the Philippines and the United States conducted another joint patrol in the South China Sea.

- Meanwhile, U.S. and EU officials expressed concerns about the future of the U.S.-EU Trade and Technology Council (TTC) given the upcoming U.S. election.

- The Biden administration is reportedly pressing the Netherlands to prohibit ASML from selling certain semiconductor manufacturing equipment to China.

- Leading U.S. companies in artificial intelligence are reportedly asking Taiwanese manufacturers to set up AI-related production plants in Mexico to “replace products imported from Asia.”

*Associated News Sources:*

[“TSMC wins \\$6.6 bln US subsidy for Arizona chip production,”](#) *Reuters*, April 8

[“AUKUS partners eye adding ‘like-minded’ Japan to counter China,”](#) *Financial Review*, April 8

[“U.S., Japanese and Australian Warships Join Philippine Forces in South China Sea Patrol,”](#) *USNI News*, April 7

[“EU and US vow to team up against China, but can’t hide the cracks,”](#) *Politico*, April 5

[“Exclusive: Targeting Chinese chips, US to push Dutch on ASML service contracts,”](#) *Reuters*, April 4

[“U.S. Tech Giants Turn to Mexico to Make AI Gear, Spurning China,”](#) *The Wall Street Journal*, March 30 [Paywall]

## Electric Vehicle Market Still Garnering Fresh Chatter



A Tesla Model S Bluefire at the Tesla Service Center in Bern, Switzerland. (Source: UnSplash)

## - In Other News -



The Arleigh Burke-class guided-missile destroyer USS Ralph Johnson (DDG 114) conducts a live-fire exercise in the Philippine Sea on April 5, 2024. (Credit: U.S. Navy photo by Mass Communication Specialist 3rd Class Alexandria Esteban, public domain)

- Li Auto, known as Tesla's closest rival in mainland China, announced plans to very soon launch a new, more economical electric vehicle (EV) model aimed at families.

- As Treasury Secretary Janet Yellen wraps up her visit to China with repeated mentions of "overcapacity" by China, China's Minister of Commerce Wang Wentao began a trip to Europe with a roundtable meeting in Paris with many, including top BYD and CATL, to express Beijing's support. Wang reiterated that "China's electric vehicle companies rely on continuous technological innovation, perfect production and supply chain system and full market competition for rapid development, not relying on subsidies to gain competitive advantage."

- China's biggest EV maker BYD reported its sales fell by 43% in the first quarter compared to the fourth quarter of 2023, bringing its numbers again below that of Tesla's.

- U.S.-based EV maker Tesla, facing a global slowdown in EV demand and increasing number of rivals, saw its biggest-ever quarterly sales miss, especially in China where much of its market has historically been located.

- Chinese smartphone maker Xiaomi is kicking off sales of its first electric vehicles with aggressively low pricing set at just under \$30k in a market where Apple has failed.

*Associated News Sources:*

["China EV price war: Tesla rival Li Auto says cheapest model yet to 'bring you happiness', will launch next week,"](#) *Yahoo!Finance*, April 9

["China commerce minister kickstarts Europe trip with Chinese EV firms meeting,"](#) *CNBC*, April 7

["BYD hands back top EV seller title to Tesla after Q1 sales decline,"](#) *Reuters*, April 2

["Tesla's Shrinking China Market Share Compounds Global Woes,"](#) *Bloomberg*, April 2 [Paywall]

["China's latest EV is a 'connected' car from smartphone maker Xiaomi,"](#) *NBC News*, March 28

["China Plays Tense Game of 'Russian Roulette' With U.S. Ally,"](#) *The Wall Street Journal*, April 9 [Paywall]

["Netflix's take on '3 Body Problem' gets mixed reviews in China,"](#) *Radio Free Asia*, April 6

["China's Ambassador Outlines Ambitious Plan to Jumpstart Economy,"](#) *Newsweek*, April 5

["U.S. to Crack Down on Trade 'Loophole' Used for China Apparel Shipments,"](#) *The Wall Street Journal*, April 5 [Paywall]

["U.S. loses its spot to China as Southeast Asia's most favored ally, survey shows,"](#) *CNBC*, April 3

["Lawmakers propose sanctions on US index funds investing in China,"](#) *Financial Times*, April 3 [Paywall]

["Senior US diplomat links AUKUS submarine pact to Taiwan,"](#) *Reuters*, April 3

["Russia, China catching up to U.S. in space weaponry, new report finds,"](#) *Space News*, April 2

["US senator urges Biden to review alleged Nippon Steel ties to China,"](#) *Reuters*, April 2

["Radio Free Asia closes Hong Kong bureau, citing security law concerns,"](#) *NBC News*, March 30

["US may soon unveil list of Chinese chip factories barred from receiving tech,"](#) *Reuters*, March 28

## What Are We Reading? ↓

- *Bloomberg*: ["China Has Too Much at Stake in Industry Push to Listen to Yellen"](#) by Christopher Condon (April 8, 2024) [Paywall]
- *The Economist*: ["Is China or America the big boss of the global south?"](#) (April 8, 2024) [Paywall]
- *Foreign Policy*: ["Janet Yellen Has a Three-Body Problem With China"](#) by Keith Johnson (April 8, 2024) [Paywall]
- *Axios*: ["The China pushback uniting major world powers"](#) by Courtenay Brown (April 7, 2024)
- *The Wire China*: ["China's Red Carpet"](#) by Aaron McNicholas (April 7, 2024) [Paywall]
- *The Diplomat*: ["Are We Bugs? The Geopolitics of Netflix's '3 Body Problem'"](#) by Brandon Valeriano (April 5, 2024) [Paywall]
- Chicago Council on Global Affairs: ["State lawmakers are concerned about Chinese ownership of US land, but other countries own much more American acreage"](#) by Hope O'Dell and AJ Caughey (April 4, 2024)
- *The Diplomat*: ["The Broadening Strategy of U.S. Technological Restrictions on China"](#) by Yingfan Chen, Hamilton Chen and Dingding Chen (April 4, 2024) [Paywall]
- United States Institute of Peace: ["U.S., Japan, Philippines Strengthen Strategic Bonds to Counter China"](#) by Brian Harding, Haroro Ingram and Andrew Mines (April 4, 2024)

- *The New York Times*: [“What Janet Yellen Needs to Tell China’s Leaders”](#) by Peter Coy (April 3, 2024) [Paywall]
- Atlantic Council: [“How China could respond to US sanctions in a Taiwan crisis”](#) by Logan Wright, et al. (April 1, 2024)
- *Bloomberg*: [“The US Can’t Let China Dominate the Small-Drone Market”](#) by Thomas Black (April 1, 2024) [Paywall]
- Council on Foreign Relations: [“On Fentanyl, Biden Should Look to Work With China”](#) by Zongyuan Zo Liu (April 1, 2024)
- Center for Strategic & International Studies: [“America is Losing the Shoe Race With China”](#) by James Andrew Lewis (April 1, 2024)
- *East Asia Forum*: [“Avoiding the awful consequences of breakdown in the US-China relationship”](#) (April 1, 2024)
- *Foreign Policy*: [“‘Everything, Everywhere, All At Once’: U.S. Officials Warn of Increased Cyberthreats”](#) by Rishi Iyengar (April 1, 2024) [Paywall]
- *Financial Times*: [“China’s hypocrisy on trade”](#) by Rana Foroohar (April 1, 2024) [Paywall]
- *The New Yorker*: [“How Chinese Students Experience America”](#) by Peter Hessler (April 1, 2024)
- *The Economist*: [“How Xi Jinping plans to overtake America”](#) (March 31, 2024) [Paywall]
- *Foreign Policy*: [“Power Is the Answer in U.S. Competition With China”](#) by Michael Mazza (March 31, 2024) [Paywall]
- *The New York Times*: [“One Satellite Signal Rules Modern Life. What if Someone Knocks It Out?”](#) by Selam Gebrekidan, John Liu and Chris Buckley (March 30, 2024) [Paywall]
- Asia Society Policy Institute: [“How Will the Next U.S. President Tackle the China Economic Challenge?”](#) by Wendy Cutler (March 29, 2024)
- *The Washington Post*: [“Preparing for a China war, the Marines are retooling how they’ll fight”](#) by Ellen Nakashima (March 29, 2024) [Paywall]
- *The New York Times*: [“Bidenomics Is Making China Angry. That’s OK.”](#) by Paul Krugman (March 28, 2024) [Paywall]
- Center for Strategic & International Studies: [“U.S.-China Scholarly Recoupling: Advancing Mutual Understanding in an Era of Intense Rivalry”](#) by Scott Kennedy (March 27, 2024)
- *The New York Times*: [“A.I. Leaders Press Advantage With Congress as China Tensions Rise”](#) by Cecilia Kang (March 27, 2024) [Paywall]

## What’s Happening Around Town?

### - Past Events -

- [2024 China Town Hall](#)  
April 9 hosted by International Relations Council & Partners
- [The Lay of the Land for Sustaining Climate-Smart Agriculture in the US and China: A China Town Hall Conversation](#)  
April 8 hosted by Wilson Center
- [New Horizons: Navigating the Future of US-China Educational Exchanges](#)  
April 4 hosted by China Institute
- [The Return of Great Powers](#)  
April 2 hosted by *Foreign Policy*
- [U.S.-China Scholarly Recoupling: The Path Forward | CSIS Events](#)  
March 28 hosted by Center for Strategic & International Studies


### - Upcoming Events -

- [Chips and the China Threat](#)  
April 11 hosted by Hudson Institute
- [Commemorating the 45th Anniversary of the Taiwan Relations Act – Part I](#)  
April 12 hosted by Foreign Policy Research Institute
- [Green Alliances: Cultivating US and Chinese Climate Leadership on Food and Agriculture](#)  
April 16 hosted by Wilson Center & U.S. Heartland China Association
- [New Cold Wars: China’s Rise, Russia’s Invasion, and America’s Struggle to Defend the West](#)  
April 17 hosted by Wilson Center
- [Should the United States change its policies around Taiwan?](#)  
April 25 hosted by University of Minnesota China Center & Brookings Institute



# What ICAS Is Up To

---Upcoming TnT Program Event---



**ICAS**  
Institute for China-America Studies


## The United States, China and AI: What Does Cooperation Look Like

**Wednesday, April 10, 2024**  
9:30am - 10:30am EST  
Virtual (Zoom)


Artificial Intelligence has emerged as an unlikely area of U.S.-China cooperation amid their race for supremacy in cutting-edge technologies. In November 2023, President Biden and President Xi agreed to establish a gov-to-govt mechanism to discuss AI at their summit in Woodside, California, and a US-China working group on AI is expected to hold talks later this spring. Alongside, American AI companies have engaged in discussions with Chinese AI experts, and leading scientists of both nations have jointly put out calls for tighter controls on the technology.

As the U.S.-China working group on AI convenes later this spring, what are the set of priority areas to be discussed? Have the parameters of their discussion been established? What are the areas of common interest that are drawing the two sides together? Do the U.S. and China share a common vision of the core 'red lines' that powerful AI systems should not cross? Do they trust their counterpart enough to limit their own capability voluntarily? Can the U.S.-China talks, along with their discussions with the EU, serve as a building block for a multilateral treaty, say, on the lines of the 1960s-era Nuclear Non-Proliferation Treaty? Furthermore, what is the particular Chinese interest in these talks? And where does AI sit within the larger scheme of China's technological advancement aspirations? To listen to these and other answers and insights on pressing U.S.-China AI policy questions, tune in to the event on April 10th.

*Panelists*



**PAUL TRIOLO**  
Associate Partner for China and  
Technology Policy Lead  
*Albright Stonebridge Group*



**Denis SIMON**  
Distinguished Fellow  
*Institute for China-America Studies*

*Moderator:* **Sourabh GUPTA** - Senior Fellow & Head of Trade 'n Technology Program  
*(Institute for China-America Studies)*

*Welcoming Remarks:* **Nong HONG** - Executive Director *(Institute for China-America Studies)*

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[View the Event Program](#)

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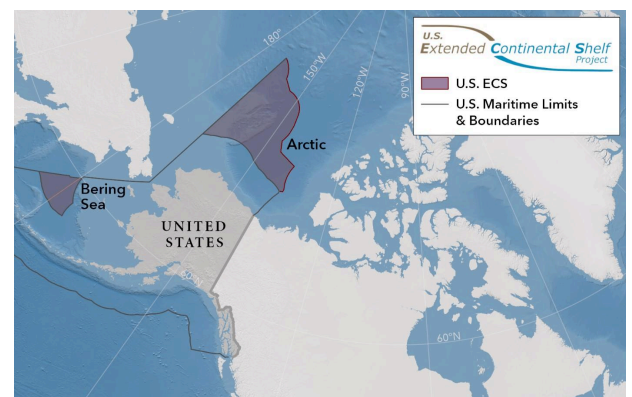
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## ---MAP Commentary---

### Some Observations on the U.S. Announced Extended Continental Shelf Outer Limits

*By Nong Hong*  
*April 8, 2024*

On December 19, 2023, the United States Department of State announced the outer limits of its continental shelf in areas beyond 200 nautical miles from the territorial sea baselines, or extended continental shelf (ECS), in various coastal regions including the Arctic, Atlantic (east coast), Bering Sea, Pacific (west coast), Mariana Islands, and two areas in the Gulf of Mexico. The ECS Task Force, chaired by the Department of State, oversees the delineation of these



outer limits. The US Geological Survey (USGS) is responsible for collecting, processing, and interpreting seismic and geologic data, while the National Oceanic and Atmospheric Administration (NOAA) handles bathymetric data collection, processing, and analysis. This has sparked debates regarding whether the United States can bypass the Commission on the Limits of the Continental Shelf (CLCS) to proceed with the delineation of its continental shelf limits...

[Link to Full Post](#)

---Upcoming MAP Event---

**The United States and China's Global Maritime Relations: Inevitable Competition or Feasible Collaboration?**

Thursday, April 18, 2024  
10:00am - 11:30am EST

In-Person (Washington, DC) & Online (Zoom)

As science and technology continue to advance, the ocean, covering 71% of the Earth's surface, is undeniably assuming an increasingly vital role for humanity. Consequently, nations are diligently pursuing their respective maritime interests, revealing both commonalities and distinctions. The United States and China, widely recognized as major powers in contemporary international politics and prominent maritime nations, are increasingly focusing their attention on global maritime domains.

How do the maritime policies of China and the United States differ in terms of strategic objectives and priorities? What are the primary areas of competition between China and the United States in global maritime affairs? How do the maritime disputes, such as those in the South China Sea, impact the overall relations between China and the United States? Are there any ongoing cooperative efforts between China and the United States in global maritime security or environmental protection? What role do international law and institutions play in shaping the interactions between China and the United States in global maritime relations? How do the military doctrines and strategies of China and the United States intersect or diverge in the maritime domain?

The poster includes the following text:

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In her new book *US-China Global Maritime Relations*, Dr. Nong Hong explores the U.S.-China maritime relationship within the global context and investigates six key maritime regions: the South China Sea, the Northeast Asia waters, the Indian Ocean, the South Pacific Ocean, as well as the Arctic and Antarctic regions. Through detailed observations, this book offers a comprehensive exploration of these regions and their significance in shaping the dynamics between the two nations. This event will feature the author of *US-China Global Maritime Relations*, who will discuss the evolution and execution of maritime strategies pursued by both the United States and China. Moreover, three panelists will provide their insights on this subject, representing perspectives from the United States, China, and a third-party viewpoint.

**Introduction**  
**Philippe RHEAULT**  
Director  
The China Institute,  
University of Alberta

**Book Talk**  
**Nong HONG**  
Executive Director &  
Senior Fellow  
Institute for China-America Studies

**Panelists**

**Gregory POLING**  
Director, Asia Maritime  
Transparency Initiative  
Center for Strategic and  
International Studies

**Dingli SHEN**  
Professor Emeritus and Former  
Executive Dean, Institute of  
International Studies  
Fudan University

**Gilang KEMBARA**  
Research Fellow,  
S. Rajaratnam School of  
International Studies  
Nanyang Technological University

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## Blue Carbon & Climate Change 2024 Q1 Has Been Released!

The first week of April, the ICAS Blue Carbon & Climate Change Program released its BCCC Quarterly newsletter for 2024 Q1. This issue features a 'Theme of the Quarter' on "Renewable Energy Storage" and a 'Blue Carbon Country Profile' on 'India.'

Released each quarter, the BCCC Quarterly records the most important trends and developments regarding blue carbon policies and regulations in China, the U.S., and other regions, as well as international regimes, such as under the United Nations framework. It also includes two special sections—the 'Theme of the Quarter' and the 'Blue Carbon Country Profile'—that aim to bring a fresh and applicable element to each issue.

[Explore & Share the BCCC Quarterly 2024 Q1 Issue](#)

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BCCC Quarterly (Q1 2024) - 1

### Theme of the Quarter: Renewable Energy Storage

#### [News Stories on Renewable Energy Storage](#)

##### The Lithium Battery Industry is Facing a Bright but Volatile Future

Development in renewable energy requires the support of advanced energy storage technology, and in this rapidly developing field, batteries—especially lithium batteries—have come to represent the world's most sustainable, cutting-edge energy storage technology. Recent technological achievements, private investments, and policy support all indicate that the battery industry, in its role as an energy storage technology, still has a bright future and will continue to play a critical role in the global transition to renewable energy.

Chinese scientists have recently made major breakthroughs in battery technology. By developing a more powerful winter-proof lithium battery that can charge and operate at temperatures as low as minus 80 degrees Celsius, they have paved the way for high-capacity batteries capable of operating in extreme conditions. Such technological advances offer the opportunity to significantly increase the potential and reliability of batteries for electric vehicles and aviation, and also represent a leap in the ability to store and utilize energy more efficiently under extreme environmental conditions. Investors in other countries have also increased their investment in lithium battery materials in new ways, such as Massachusetts-based Ascend Elements that decided to invest an additional US\$162 million to build a new battery factory in the United States. The factory aims to fundamentally change the production of battery materials, aiming to make lithium batteries more environmentally sustainable through the use of new engineering materials. It hopes to significantly reduce the recycling costs and carbon emissions of lithium batteries. In addition, some scholars predict that U.S. battery storage capacity will nearly double by the end of 2024. This expansion is mainly to cope with the excess power generated by the growing installed capacity of renewable energy sources such as wind and solar energy. The simultaneous growth of battery storage capacity provides a guarantee for the expansion of renewable energy, further boosting the development of renewable energy while ensuring a stable and reliable relationship between energy suppliers and energy consumers.<sup>1</sup>



Affected by geopolitical tensions and strategic competitions, the landscape of the battery market and the development policies of different countries and companies are also constantly evolving. Nevertheless, the overall objective of accelerating the development of battery storage technology and capacity remains unchanged for all players. Despite the rising geopolitical tensions and increasingly complex and

<sup>1</sup> Employees working on a lithium batteries production line at a workshop in Nantong, China on February 29, 2024. (Source: Photo by STR/AFP via Getty Images, Royalty-Free)

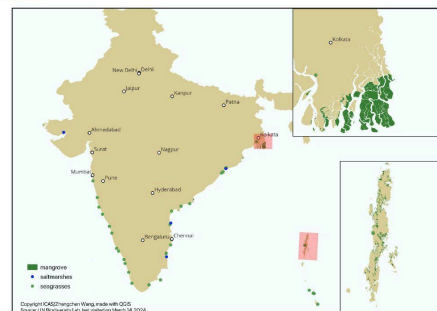
BCCC Quarterly (Q1 2024) - 20

### Blue Carbon Country Profile: India

#### A. Potential of India in Blue Carbon Affairs

India's vast and diverse marine and coastal ecosystems provide the necessary conditions for the growth of blue carbon ecosystems along the country's coast. Blue carbon is also making significant contributions to India's goals of mitigating climate change and improving coastal resilience through carbon sequestration and ecological protection. At present, India's blue carbon is all found in traditional blue carbon ecosystems, mainly including mangroves, seagrasses, tidal marshes, and salt marshes, and are spread across its lengthy coastline of over 7,500 kilometers. The importance of blue carbon ecosystems also extends beyond their carbon capture capabilities. Blue carbon protects fishery and tourism resources and prevents coastlines from being damaged by natural disasters, playing an important role in supporting the livelihoods of coastal residents along the coastline of India. Moreover, blue carbon has effectively pushed forward India's progress towards achieving its commitment to net-zero emissions in 2070. The total carbon sequestration potential of India's coastal ecosystems is estimated to be around 700 million tonnes of carbon dioxide, accounting for approximately 22% of India's annual carbon emissions, with blue carbon accounting for a major portion of it.

- Amount of seagrass: 517 km<sup>2</sup> (2023)
- Amount of mangroves: 4991 km<sup>2</sup> (2023)
- Amount of salt and tidal marshes: 290-1398 km<sup>2</sup> (due to contradictions in estimates)
- Key Institutions of study on blue carbon: Advanced Centre for Biotechnology and Mangrove Forests of the Institute of Forest Biodiversity
- Key regions of interest: Sundarbans Mangrove Forest, Pichavaram Mangrove Forest, Andaman and Nicobar Islands<sup>4</sup>



<sup>4</sup> Point and polygon data of blue carbon ecosystems in India. Copyright ICAS/Zhangchen Wang, 2024, made with QGIS. (Source: UN Biodiversity Lab)



---BCCC Commentary---**The dynamic transition to clean hydrogen requires temporary compromises**

By Zhangchen Wang

March 29, 2024

As the lightest and most abundant element in the universe, hydrogen plays a crucial role across a wide range of applications. According to the U.S. Energy Information Administration (EIA), hydrogen serves various industrial purposes, including in the production of fertilizers, serving as a fuel in metal smelting and electricity generation, and functioning as a reactant or catalyst in the manufacture of various chemicals. For sustainable development purposes, the biggest significance and advantages of hydrogen include its roles as a clean energy source and an efficient energy storage carrier. Nevertheless, according to 2021 data, the global production of hydrogen is still limited with only about 75 million tons per year. This level of production is sufficient just for existing industrial demands and falls short of making a significant impact in carbon reduction efforts...

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On Friday, April 5, 2024, Senior Fellow Sourabh Gupta [discussed](#) the current global economic outlook on *CGTN America's The Heat*.

- “Frankly, Mr. Modi’s record on anti-poverty is not terribly good. I mean, a lot of people—because of COVID, because of other emergencies—have fallen back in poverty and actually have had to go back to the farm. But Mr. Modi runs a very sophisticated political machine...there’s so much accomplished related to his nationalist economic agenda, and for that I think he will get rewarded...”

On Monday, April 1, 2024, Senior Fellow Sourabh Gupta was [quoted](#) by *China Daily* on Chinese EVs and Treasury Secretary Yellen's speech on excess capacity in China's EV sector.

- "Even more impressive than the provision of these large-volume, low-price green products is the Chinese government's resolve to stand behind and support the creation of markets at scale for these products, such that many renewables and green products are cost-competitive today..."
- “China is moving away from that overinvestment model, but the level of domestic savings remains excessively high. As such, there are understandable fears that these savings (and domestic underconsumption) will macroeconomically manifest themselves in the form of domestic overproduction dumped overseas in export markets.”

On Thursday, March 28, 2024, Senior Fellow Sourabh Gupta [discussed](#) China’s ties with the Global South on the occasion of the Boao Forum on *CGTN's The Point with Liu Xin*.

- “This is a continuation of China’s outreach to the Global South and the Global South’s outreach to China...there is not just one pathway to modernization and China has blazed a trail in terms of its own pathway to modernization...”