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CHINA ELECTRIC VEHICLE

Mar./Apr. 2014

# 080

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中国智能电车 将长出脑子来

CHINA EV WILL BE MORE INTELLIGENT

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# 奉献三个锦囊 创新商业模式 Business Model Innovation

## ——“扬弃汽车，创新电车” —— Abandoning Fuel Cars and Populating Electric Cars

文/本刊评论员 Text / Our Commentator

汽车动力技术电动化是一百多年都没有解决的难题。我国电动汽车——电车的发展已经进入快车道，处于产业发展的导入期。导入期必须越过产业化门槛，化解商业化难题。这有一个非常艰难的过程。

推广电车何其难也？难就难在“商业模式”。此前思路只是示范“车”，如今改变思路要抓住“人”；不要老盯着“车”，要把注意转向“人”。普及电车的核心是人，要让人在电车普及中，改变习惯形成共识，理解和接受电车这个新生事物。我们从人们的思维习惯和行为模式入手，奉献三个锦囊，创新商业模式。

### 其一、建“绿色特区”定位

过去，老拿电车去给大城市那些已经习惯“汽车生活”的有钱人说事，意欲改变他们“最可怕的习惯势力”。结果，人家眼珠子动都不动不屑一顾，钱袋子就是不开口不给一个铜板。这是十城千辆成为“烂尾工程”的根本原因。如今，如法炮制，还加大补贴，还是在示范“车”，其结果依然存在许多不确定因素。

换个思路，面向那些没有“汽车生活”习惯的人们推广电车，让他们率先享受“电车生活”。纵观全国许多小城镇里，那些已经习惯电动自行车、电动摩托车的人们，初步体验到“绿色行走”的乐趣；如今，交通工具升级换代，顺理成章升级为4轮微型电车——当前推广重点，他们求之不得。这符合电车由小到大的成长规律。电车在这些小城镇具有群众基础和直接需求。为什么不向他们推广呢？

看来，实行“农村包围城市”，选择小城镇做示范、建“绿色特区”是一个可供选择的方案。“绿色特区”必须“扬弃汽车，创新电车”，建成为“绿色行走”的典范。特区内按车龄逐年淘汰所有汽车、再不许购买新汽车，只能给予补贴买新电车；外地燃油汽车一律不许进特区，必须更换当地“出租电车”或交“污染费”（按坡度逐年提高）才能进出。这样，操作简易，效果震撼。

Automobile electric power technology is a problem for more than one hundred years. The development of electric cars in China has entered the fast lane and is in the promotional stage. This promotional stage should go cross the threshold of industrialization, dissolving the commercial problems. There is a very difficult process.

The difficulty in promoting EV is in the business model. In the previous time, the promotional plan was focused on the car, but now this plan should be focused on humanity. The EV is human-orientated. It should change the habit for the people and let them accept this new thing - EV. We start from the habits of thinking and behavior patterns and propose our ideals in the innovation of the business model.

### The first is the special green zone

In the past, the electric car was promoted among the rich hoping that they could change their habit. But they did not change their habit, instead, they still ignore this new thing. This is why the 10-City-1000-Car project failed. Now, the similar policy still is implemented whereas the subsidies are adopted. But many uncertain factors still exist.

Alternatively, the customers previously not driving fuel cars welcome the new electric car. The evidence is in many towns where bicyclers and motorcycle drivers are enjoying the green life. It is these people who easily accept the 4-wheel electric cars. Therefore, it will be a good way to popularize electric cars among them. Electric cars have the mass base and market demand in towns. Why don't you promote to them?

It is true that the good pathway is to encircle the cities from rural areas and build green zones. The green zone advocates the electric cars and suppresses the fuel cars, so becoming a model of green transportation. In this special green zone, all cars will be abandoned according to their use time, and the subsidies are provided for new cars. Moreover, nonlocal fuel cars are not allowed to the special green zone. In this way, the operation is easy with a good effect.

### The second is that everything starts from the green scenic area

Select 5-10 tourist areas as green scenic areas whose scale is generally smaller than the special green zone. The green scenic area protects the natural ecological environment by immediately abandoning fuel cars. This work is easy too.

In the scenic green area, all the fuel cars are banned, while their owners are rich people with “the most terrible habits”. In stead, the

## 其二、从“绿色景区”开始

选择5-10个旅游区建设成为“绿色景区”——“汽车禁区”。“绿色景区”规模一般小于“绿色特区”，保护自然生态，立即淘汰燃油汽车、建成“汽车禁区”轻而易举。

“绿色景区”完全禁绝一切燃油汽车，谢绝一切燃油汽车“自驾游”——这个群体正是具有“最可怕的习惯势力”的有钱人。对不起！景区内设置“电车出租”网络，实行刷卡“电车自助游”。强迫他们切身感受和体验“绿色驾驶”的乐趣，强势宣传和灌输他们“扬弃汽车，创新电车”的历史趋势不可逆转，强行动摇和改变他们“最可怕的习惯势力”。他们燃油汽车“自驾游”到处受挫和碰壁，又有“电车自助游”的感受和体验。之后，他们更新座驾时，就可能选择电车。

## 其三、从“绿色驾驶”抓起

人，都有先入为主的思维定式和亲身体验的行为模式。就以此为出发点，从“绿色驾驶”抓起，普及电车。

这里，急需改造驾校！让“驾驶学校”逐步改用电车作为“教练车”，或同时感受“电车驾驶”与“汽车驾驶”的双重学习，让学员从切身体验中明白，电车比汽车优越：构造简单、操作简便、运行省钱、维护节省等等。这样，全国所有的驾驶学校便立即变成“电车推广站”。

须知，驾校学员都是当下潜在的汽车市场消费者！2012年全年有2647万人考驾照，参加学习的应该有3000多万人。如果都学习“电车驾驶”，都有“绿色驾驶”的体验，那么他们将是新兴“电车人类”，就可能首选购买电车。如果他们中有一半人购买电车，那么就可以推广1323-1500万辆电车。有了“电车人类”群体，各种试范、推广及指标就能轻而易举地完成。

是的，需要为驾校设计专用“电动教练车”。其一般功率较低、行驶里程较短、行动空间较小、充电相对方便、维护也简便等等。整车成本应该比私人电车低。虽然降低成本，但在安全配置上，应该适当增加智能电车的配置：前方超声雷达、自动限速、自动刹车等。“电动教练车”一旦问世，驾校一定欢迎，普及电车功不可没。

如今驾校的“燃油教练车”，油费一月平均3500元，三年12万元；发动机维修费每年平均6000元，三年18000元；大修三年一次，平均1万元。三年的成本近15万元。而“电动教练车”电费很低，维修费不多，额外消耗很少，三年的成本会很低。目前国内教练车存量约为375万辆，按照年替换率20%计算，每年更换约70多万辆。商机无限，何乐不为？

扬弃汽车，创新电车！

electric car rental network is set up, and the self-help tour is available via the electric car. These rich people in the scenic green area are forced to experience the green driving and understand the irreversible trend of abandoning fuel cars and advocating electric cars as well as change their habits. When driving fuel cars, they will frustrate and have a bad mood, instead, they have a good feeling in driving the electric car. As such, the electric car will be popular among them.

## The third is the green driving

Humans used to the stereotypes in thinking. On the other hand, they desire a new try. According to this, the concept of green driving should be irrigated into the mind of children.

Here, it is urgent to remodel the driving school. In it, the instructional car should be electrically driven and the trainees have the experience of driving electric cars and understand the advantages of the electric cars: simple structure, easy to operate, saving cost, good maintenance, and so on. In this way, all of the driving schools will immediately become the EV promotion stations in the country.

Remember that the driving school students are the potential auto market consumers! In 2012, 26.47 million people took part in the driving test and about 30 million people were trainees. If they have the experience of green driving, then they might prefer to buy the electric cars. If 50% of them buy electric cars, then the number of promoted electric cars will be 13.23-15 million. With the groups of electric car owners, a variety of demonstration and promotion so forth can be easily done.

Yes, the training schools need instructional cars which should be specially designed: generally, they should feature low power, short range, less space, convenient charging and maintenance etc. The cost of instructional electric cars should be lower than common electric cars. In the safe configurations, the instructional electric cars should have ultrasonic radars in the front, automatic speed limitation, automatic braking, and etc. The electric instructional cars should be popular in the training schools, which can greatly contribute to the popularization of electric cars.

For a fuel car for the sake of instruction, the oil cost averages 3500 yuan a years, and 120000 yuan three years; engine maintenance cost averages 6000 yuan a year, three years 18000 yuan; overhaul cost average 10000 yuan a year and nearly 150000 yuan three years. On the other hand, for an instructional electric car, the electric cost is low, and so is the maintenance cost. At present, there are about 3.75 million instructional cars in the country, and about 700000 instructional cars are replaced at the annual replacement rate of 20%. Therefore, the business opportunities are unlimited. Abandon the fuel cars, and advocate the electric cars!



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卷首语 Foreword

## 01 奉献三个锦囊 创新商业模式

Business Model Innovation  
政策导航 Policy Navigation

## 04 发展清洁能源减免电动汽车购置税

The development of clean energy Electric vehicle purchase tax relief  
能源安全 Energy security

## 08 建设智能电网保障能源安全

Construction of smart grid, protect the energy security  
特别报道 Special Report

## 14 迪拜时速250公里“超级巴士” 雷天温斯顿电池“神来之笔”

Dubai 250KM-Speed Super Bus Uses Winston Battery  
特别报道 Special Report

## 20 台湾欢迎温斯顿稀土锂电池装备桃园45辆电动巴士

Taiwan Winston Rare-earth Lithium Battery Used in 45 Electric Buses at Taoyuan  
业界前瞻 Industry perspective

## 24 微型迷你电车 或成未来主流

Mini electric vehicle may be the mainstream in the future  
动力电池 Power Battery

## 28 锂电池正在进行静悄悄的革命

Lithium-ion Batteries Are Under A Quiet Revolution

## 30 锂电正极材料把握电车命运

Li-ion Battery Anode Material and Electric Car

权威论坛 Authoritative Forum

## 34 政府应成为推动电动车的主导力量

The government Should Become the Dominant Force in Electric Vehicles

## 40 中国电动汽车或成世界领跑者

China Electric Car May Be a World Leader  
智能电车 The intelligent car

## 42 中国智能电车将长出脑子来

China EV Will Be More Intelligent  
新车发布 The new release

## 48 腾势电动汽车全球首发

DENZA electric vehicle is launched in the global  
产业链条 Industry Chain

## 50 中国稀土真相 当前行业走向

China's Rare Earth Industry: Current Review

## 54 发展电机产业 做强电动汽车

Development of Motor Industry and Electric Cars  
电动技术 Electric Drive Technology

## 58 特斯拉旋风刮到中国

Tesla Comes to China  
科技集锦 Technical Highlights

## 62 汽车电子新技术 自动驾驶新进展

New Technology of Automotive Electronics: Auto-Driven Driving  
企业风采 Enterprise Parade

## 66 万向收购菲斯科打造中国“特斯拉” (下)

Wanxiang Group Acquired Fisker Automotive to Build China's Tesla (2)  
科技前瞻 Leading Technology

## 74 仿生技术 探索人工智能研发智能汽车

Bionic Technology: Artificial Intelligence and Intelligent Vehicles  
汽车文明 Cars Civilization

## 80 汽车革命 无人驾驶

Revolution: Self-driving Cars  
电动辅助 Electrification Supplement

## 92 月球谜团 (下)

Mysteries in the Moon (2)  
如是我闻 This I Have Heard


## 96 每个人都是神 每个人都是佛

Everyone is the Buddha

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# 发展清洁能源 减免电动汽车购置税

## The development of clean energy Electric vehicle purchase tax relief

3月21日，中共中央政治局常委、国务院总理李克强主持召开节能减排及应对气候变化工作会议，强调发展清洁能源和节能环保产业。

而电动汽车产业曾被定位为中国赶超西方工业的一个大好机会，2009年国家发动第一轮新能源汽车推广，但目前看来，实际效果与规划相差甚远。国务院不得不指派马凯副总理负责，高规格盯紧新能源汽车产业发展。

### 发展清洁能源和节能环保产业

李克强指出，去年节能减排取得新进展，但今年的任务更加艰巨，要在保持经济增长7.5%左右的情况下，实现单位GDP能耗下降3.9%以上的目标。

节能减排与促进发展并不完全矛盾，关键是要协调处理好，找到二者的合理平衡点。淘汰落后产能，关停高耗能、高排放企业，会对增长带来影响，但其中也蕴含着很大商机，会为新能源、节能环保等新兴产业成长提供广阔

文/李清 Text / Li Qing

On March 21, the political bureau of the CPC central committee and state council premier li keqiang chaired a work conference on energy conservation and emissions reduction and climate change, emphasizing the development of clean energy and energy conservation and environmental protection industries.

And the electric vehicle industry has been positioned for China to catch up with a good chance of western industry, in 2009 launched the first round of national new energy vehicles, but so far, the actual effect and planning. Had to appoint Ma kai, vice premier of the state council shall be responsible for, high-profile watch the development of new energy vehicles industry.

### Develop clean energy, energy conservation and environmental protection industries

Li keqiang pointed out that progress was made in energy conservation and emissions reduction last year, but this year's task is more difficult, to



空间。积极发展风电、核电、水电、光伏发电等清洁能源和节能环保产业，开工一批新项目，大力推广分布式能源，发展智能电网，逐步把煤炭比重降下来。尤其是要着力发展服务业特别是生产性服务业。

李克强强调，《政府工作报告》已对今年节能减排工作作出部署，要加强政策引导，更多引入和运用市场机制，推进工业、建筑、交通运输、公共机构等重点领域和重点单位节能，加大污染特别是大气污染治理，努力改善重点地区雾霾状况。建立和实施能效“领跑者”等制度，增强全社会特别是企业节能减排的内在动力。要强化责任，把燃煤锅炉改造、淘汰黄标车、电厂脱硫脱硝除尘等任务指标分解到各地区，对完不成任务的，要加大问责力度。严格执法，对非法偷排、超标排放、逃避监测等“伤天害人”行为和监管失职渎职重拳打击，对相关企业、单位和责任人严惩不贷。今年国务院要组织明察暗访，发现问题一查到底，决不放过。

李克强说，应对气候变化与节能减排相辅相成，是人类的责任。中国作为负责任的大国，愿主动积极作为，与世界各国一道，在坚持共同但有区别的责任原则、公平原则、各自能力原则的基础上，为应对气候变化的挑战作出更大努力。

会议原则通过《2014—2015年节能减排低碳发展行动方案》，并研究讨论了我国应对气候变化的行动方案。

中共中央政治局常委、国务院副总理张高丽，中共中央政治局委员、国务院副总理马凯，国务委员杨晶、杨洁篪、王勇参加会议。

## 考虑减免电动汽车购置税

与此同时，3月26日，国务院副总理马凯今年以来第二次考察深圳新能源汽车企业，并以前所未有的高度对过去五年新能源汽车发展的障碍做了分析，把“充电设施建设滞后于整车的研发、生产和推广”定性为新能源汽车市场化推广最大的客观矛盾。

马凯提出了新的方法论和扶持办法：由国务院副总理牵头，成立各部委联席会议，由原来四部委的协同推进，

maintain economic growth around 7.5% of the cases, the realization of the goal of energy consumption per unit GDP fell by more than 3.9%.

Energy conservation and emissions reduction and promote development is not contradictory, the key is to coordinate to deal with, find a reasonable balance of the two. Backward production capacity, shut down in energy intensive and highly polluting enterprises, will influence on the growth, but which also contains great business opportunities, for new energy, energy conservation, environmental protection and other emerging industries provide broad growth space. Actively developing wind power, nuclear power, hydropower, clean energy, energy conservation and environmental protection industries, such as photovoltaic starts a number of new projects, promoting the distributed energy, smart grid development, gradually cut down the proportion of coal. Especially focus on the development of service industry, especially producer services.

Li KeQiang stressed that the government work report has been deployed to energy conservation and emissions reduction work this year, to strengthen policy guidance, for more introduce and use of market mechanism, promote the industrial, construction, transportation, public institutions and other key areas and key units and energy saving,



increasing pollution especially the atmospheric pollution, play efforts to improve key areas haze. Establishing and implementing the "leader" of energy efficiency systems and so on, to enhance the whole society especially the inner motive power of enterprise energy conservation and emissions reduction. To strengthen the responsibility, the coal-fired boiler consists car modification, elimination, power plant desulfurization denitration dust cleaning tasks such as index decomposition to various areas, to finish the task, to increase the accountability efforts. Strict law enforcement, and the excess emissions of the illegal discharges, and evade monitoring regulation and "harm injury days" malfeasance, hammered the related enterprise, unit and person punished without leniency. This year the state council should organize for investigations, problems should be found out in the end, and never let go.

Li said the response to climate change and energy conservation and emissions reduction supplement each other, is the common duty of mankind. As a responsible big country, China is willing to take the initiative to actively as, together with the rest of the world, insist on common but differentiated responsibility principle, fair principle, the principle on the basis of their ability, to cope with the challenge of climate change to greater efforts.

增加到九部委；一些能切实刺激消费的方案也正在考虑，比如减免新能源汽车的购置税、延缓财政补贴退坡政策、征收燃油车排污费用于电动车等等。

除了企业自身寻找发展模式和产品性能的问题，马凯总结出新能源汽车发展缓慢的四大客观因素：部分领导犹豫观望；充电设施建设滞后；扶持政策有待完善；存在不同形式的地方保护。这四个问题是需要政府来主导解决的。

马凯表示，相关部门正在进一步研究新能源汽车购置税减免政策；考虑征收燃油车排污费。在燃油附加税基础上，收取燃油车排污费，用之于电动车；考虑给新能源汽车设计绿色单独号牌(便于视觉识别)，在年审方面创造便利；研究民营资本进入、纯电动汽车整车厂生产政策、强制执行汽车油耗限额管理制度、油耗积分交易制度等。马凯还要求相关部委，在电价、保险费、停车路桥等费用为新能源汽车提供优惠政策。

如果购置税全额免除，对新能源汽车的市场化推广会产生实质性的影响，消费者买车价格会便宜很多。比亚迪e6的购置税是19641元，插电式混合动力秦也超过1万元，而纯电动大巴K9的购置税更高达20多万元。



Meeting the principle through the 2014-2015 action plan for energy conservation and emissions reduction low-carbon development, and discussed the action plan on climate change in China.

The political bureau of the CPC central committee and vice premier of the state council Zhang gaoli, member of the political bureau of the CPC central committee, vice premier of the state council Ma kai, state councilor campaign, Yang jiechi, Mr. Wang to attend the meeting.

### Consider electric vehicle purchase tax relief

At the same time, March 26, vice premier of the state council Makai since this year the second visit to Shenzhen new energy automobile enterprises, and to unprecedented heights over the past five years, the barriers in the development of new energy vehicles, the "charging infrastructure construction lags behind the vehicle research and development, production and promotion" as a new energy automobile market to promote the greatest objective contradictions.

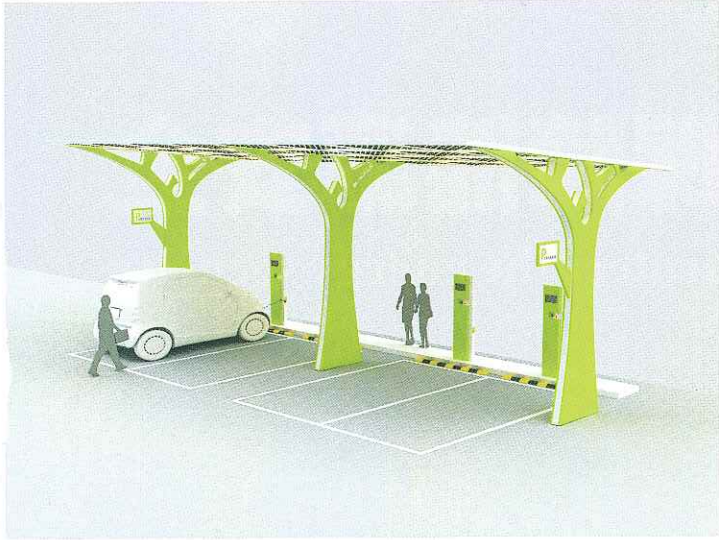
Makai had put forward a new methodology to support way: led by vice premier of the state council, set up a joint meeting of ministries, from four ministries and commissions of synergy, increase to nine ministries and commissions; Some scheme can effectively stimulate the consumption is also considering, such as new energy vehicle purchase tax breaks, delay the fiscal subsidy return slope policy, a fuel discharge used in electric vehicles, and so on.

In addition to their own look for development mode and the performance of the product, ma kai summarized the four objective factors of slow development of new energy vehicles, part of the leadership took the; Charging infrastructure construction lag; Supporting policies to be perfect; There are different forms of protectionism. These four issues are needed to dominate the government to solve.

Mr Ma said that relevant departments are further research of new energy vehicle purchase tax reduction policy; Consider a car fuel discharge. Based on the fuel surcharge, charging car fuel discharge, use to electric vehicle; Consider giving new energy automobile design green separate plate (visual identification purposes), in the year of careful creating convenience; The private capital to enter, pure electric vehicle oems production policy, enforce the car fuel consumption quota management system, the fuel consumption integral trading system, etc. Mr Ma also require related ministries and commissions, electricity price, insurance, parking toll fees for new energy vehicles to provide preferential policies. If the full tax relief, the new energy vehicles have a material impact, the







## 协同九部委建充电设施

充电设施不完善是新能源汽车产业链条“木桶上最短的板”。从产业发展的角度看，充电设施就是应该超前建设，没有所谓的先后问题。如果要考虑充电设施建设与电动车保有量谁先谁后，那就是鸡与蛋的问题，没答案。

按照此前国家新能源汽车规划，充换电站和充电桩建设任务是：2011年-2015年，电动汽车充电站规模达到4000座，同步大力推广建设充电桩；2016年-2020年，国网建设充电站目标高达10000座，建成完整的电动汽车充电网络。但截至2013年底，“主力军”国网已建成的充换电站只有400座，交流充电桩1.9万台，离2015年目标非常遥远。

马凯在会议中提出，要进一步放宽市场准入。鼓励和支持社会资本进入充电设施建设和运营、汽车租赁、电池租赁和回收等服务领域。

过去只有科技部、工信部、发改委、财政部四部委负责新能源汽车产业发展，经常在推进过程中遇到其他部门的“障碍”，政府高官的抱怨一度引发关注。这也是由副总理马凯“挂帅”的原因：可以把住建部、国土部、交通部、能源局、公安部都拉进“联席会议”，并分配各自要解决的具体问题。住建部要把充电设施建设纳入城市建设规划；能源局要指导各地建立电力基础服务网络；国土部负责充电设施建设用地政策；发改委和交通部负责充电设施运营模式。

若真能如此并快速实行，中国电动汽车的春天或将很快到来。



marketization of expansion meeting consumers buy the price will be much cheaper. E6 tax is 19641 yuan, plug-in hybrid Qin has more than 10000 yuan, and the pure electric bus K9 tax has reached more than ten thousand yuan.

## Synergy nine ministries built charging infrastructure

Charging facility is not perfect the new energy automotive industry chain "bucket on the shortest board". From the point of view of the industry development, charging infrastructure should advance construction, not the so-called successively. If want to consider charging infrastructure construction and electric vehicle ownership, it is like the question without answer about what is the first for chicken or egg.

According to the national new energy vehicles plan, exchange power station and charging pile construction mission is: 2011-2015, the electric vehicle charging station scale up to 4000 seats, synchronous promoting construction of charging pile; In 2016-2016, its 10000 goal of building charging stations, built a complete electric vehicle charging network. But by the end of 2013, the "main force" priorities were built in power station is only 400, 19000 sets of ac charging pile, It is very far away from the target in 2015.

Mr Ma had put forward at the meeting, will further relax market access. Encourage and support social capital into the charging infrastructure construction and operation, car rental, battery lease and recycling and other services.

In the past only the ministry of science and technology, Industry and Information Technology, the national development and reform commission, ministry of finance are responsible for the new energy automobile industry development, often encountered "obstacle" of other departments in the process of development, senior government officials complains had caused initially sparked concerns. This is also the deputy prime minister ma kai "assume command": can forbid the building department, the territory department, the ministry of communications, energy administration, the ministry of public security are pulled into the "joint meeting", and assign to solve specific problems respectively. Building department should put the charging infrastructure construction into the urban construction planning; Energy bureau should provide guidance based electricity service network; The ministry is responsible for the charging infrastructure construction land policy; The national development and reform commission and the ministry of communications are responsible for charging infrastructure operation mode.

If it can be so and quickly implemented, China's electric vehicle or will soon be spring.