

# 中国电动车

CHINA ELECTRIC VEHICLE

Nov./Dec. 2014

# 084

中国电动车最佳展示平台  
Advanced Platform  
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## 国务院推进新能源汽车消费

THE STATE COUNCIL TO PROMOTE NEW ENERGY AUTOMOBILE CONSUMPTION

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# 2014年是电动

## 2014: EV Will

2014年是电动汽车大发展年！在政府利好政策引导下，中国电动汽车行业出现前所未有的欣欣向荣景象。中国振奋，世界震惊。

这一年，电动汽车产销两旺，展示了中国电动汽车生产实力。根据工信部发布的电动汽车数据，2014年1-11月，累计生产5.67万辆，加上12月的销量，2014年度电动汽车销量约在6万辆左右。须知，2013年产销分别为17533辆和17642辆。呈现3-4倍增长，岂能不是“大发展”？！

这一年，中国政府密集发布电动汽车利好政策，推动电动汽车产业发展。计有：制定减免购置税目录；研究制定减免过路过桥费、停车费；免费免摇号上车牌；建设电动汽车充电设施给予奖励；明年推广电动汽车超过2.5万辆的城市给予1.2亿元奖励。

这一年，电动汽车投资火热，引爆全行业快速发展。在“2014年中国汽车产业投融资十大事件”中，电动汽车占了3大事件。在挑选的150多个汽车行业投融资重大案例中，统计发现新能源投资案例比去年增加了2倍。这意味着中国出现了若干个投资几十亿元的电动汽车投资项目。

这一年，“OPENCAR”联盟成立，组建“开源造车”团队高调亮相，而且“代工模式”或将进入电动汽车制造业。富士康是知名的代工企业，在安徽投资逾20亿元建立电动汽车生产线，人们大胆推测，这预示着代工模式或将从IT、家电行业进入电动汽车制造领域。如果代工模式存在，那么未来造车就可以不再只属于传统车企；如果汽车制造日益模块化，而技术标准逐渐“开源”，那么造电动汽车就可能像组装电脑那么简单。

这一年，大宗的兼并收购，打造全新的电动汽车产业生态链。万向集团继收购A123之后，耗费巨资成功收购菲斯克，鲁冠球扫清制造电动汽车的所有障碍，建立全新的电动汽车产业生态链，将利用菲斯克与其老对手特斯拉竞争。北

2014 witnessed the electric car development! In the policy guidance, China's electric car industry showed an unprecedented prosperous scene. It excited China and shocked the world.

This year, the electric car production and sales were good. It showed that China was strong in electric car production. Jan to Nov, 2014, total 56700 EVs were produced. Jan to Dec, about 60000 EVs were sold. In contrast, in 2013, 17533 and 17642 EVs were produced and sold, respectively. Thus, there was a 3-4-fold increase.

This year, the Chinese government issued a number of policies to promote the development of electric vehicle industry, including: tax relief directory; tolls and parking fee relief; free of lottery license plate fees; rewards in electric car charging infrastructure. Next year, the cities which promotes more than 25000 EVs will be given a reward of 120 million yuan.

This year, the electric car investment was heavy, promoting the industry rapid development. In the top 10 events of 2014, in China auto industry investment and financing, EVs were related with three. In the major 150 cases of investment and financing chosen in the automobile industry, EVs had a 2-fold increase. This means that China will have a number of important investment projects in EVs, being worthy of billions of yuan.

This year, "OPENCAR" was set up. The "open source car-building team" appeared. The OEM model came to the EVs industry. Anhui invested more than 2 billion yuan to build the electric car production line. If the OEM model is successful, then the car-manufacturing will not just be limited in the traditional car industry. If the car-manufacturing is modular, and the technical source is opened, then the EV manufacturing be as simple as building computers.

This year, there were a number of mergers and acquisitions, so giving a good impact on the electric car industry ecosystem. Wanxiang Group acquired A123 and then Fisker. Mr. Lu Guanqiu established a new electric car industry ecosystem and competed with Tesla through Fisker. BAIC acquired American Atieva an electric carmaker and cooperated with SK to set up a battery company and build their independent brand new. These might accelerate the comprehensive ecological layout of the electric car industry.

This year, "the Internet thinking" was deeply rooted in the hearts of the people. The cross-border layout began in the car market. This year, there was a 10-fold increase in the number of investment cases (up to 67 cases). SAIC set up its Car Sharing Network and A Car Station. It led the industry change by building its independent comprehensive sales and after-sales service system.

This year, innovative business models appeared, including battery



# 汽车大发展年

## Developed Rapidly

文/本刊评论员 Text / Our Commentator

汽则收购美国电动汽车制造商Atieva，并与SK组建电池公司，形成自主品牌全面加速电动汽车新产业生态布局。

这一年，“互联网思维”深入人心，开始跨界布局汽车后市场。后市场投资案例，今年比去年足足增加了10倍，达到了67件以上。上汽集团动作颇大，上线注册“车享网”，线下建立“A车站”，形成上下联动，引领行业变革，探索依托互联网全面建立独立的销售、售后服务体系。

这一年，创新商业模式，换电、充电、试驾、租赁等等，让电动汽车企业认识到推动电动汽车产业发展的最大推手是市场需求，盈利关键是商业模式。值得研究山东等地的“低速电动车”不要政府补贴，一直跑得欢快舒畅，依靠市场盈利。值得借鉴特斯拉靠市场定位精准获得成功，股票一路飙升。电动汽车或许应该探索上下班代步车的商业模式，打开市场缺口，谋求更大发展。不妨一试！

这一年，人们开始注意到电动汽车配件市场的崛起。中国汽车配件有5000多亿元的市场，已有136个厂牌，17000多款车型，每辆车有3000-6000个配件，至少有5000万个SKU(件号)。市场规模大，离散程度高。而且壁垒森严、垂直垄断、数据缺失，造成配件分隔在有限的车型上。这个局面对电动汽车的发展极为不利。中国电动汽车崛起，需要而且应该诞生一家最牛的电动汽车配件数据服务商，这是不言而喻的。

发展电动汽车的经济价值和战略意义，不仅在于发展电动汽车新兴产业的经济目标，也不仅在于节能减排减少二氧化碳排放的社会目标，更在于保障能源安全、化解外部战略压力及降低执政风险的政治目标。中国和平崛起，承受着的地缘压力越来越大，所以，中国政府密集出台一系列的电动汽车推广政策，并以前所未有的力度加紧推广。这是什么力量也无法阻挡的！

此前大推广，今年大发展，今后大飞跃。这是本题应有之义！

change, charge, drive test, and leasing etc. The electric car companies recognized the biggest driving force that could promote the development of the electric car industry was the market demand. For the profit, the key is a business model. Shandong was successful in developing the low-speed EVs, in which the profit was obvious. Tesla was successful in market positioning which was very accurate. Its stock price soared. Therefore, a deep understanding on the market can lead to a good development!

This year, people began to notice the rise of the electric car accessories market. China's auto parts market had more than 500 billion yuan, 136 brands, and more than 17000 models. Each car has 3000-3000 accessories, at least 50 million SKU (part number). When the size of the market is big, then the discrete degree will be high. The vertical monopoly, lack of data, strong restriction and so forth are not good for the development of electric vehicles. Rise of China's electric cars needs a large provider for the electric car accessories data service, and this is self-evident.

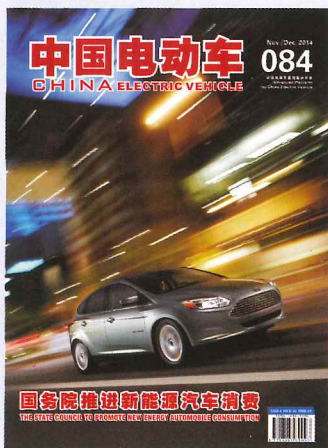
Development of the electric car is very significant in economic and strategic values. This significance not only lies in the economic goal of the development of the electric car industry, but also in the social goal of energy conservation and emissions reduction as well as the political goal of safeguarding energy security, dissolving the external pressure and reducing the risk of the ruling. China's peaceful rise leads to the geopolitical pressure which is bigger. So, the Chinese government issued a series of electric car promotion policies and spend the unprecedented efforts. It is unstoppable by whatever the power is.

In the previous years, China carried out a big promotion. In the future, the great development and the great leap forward will be seen in the future.



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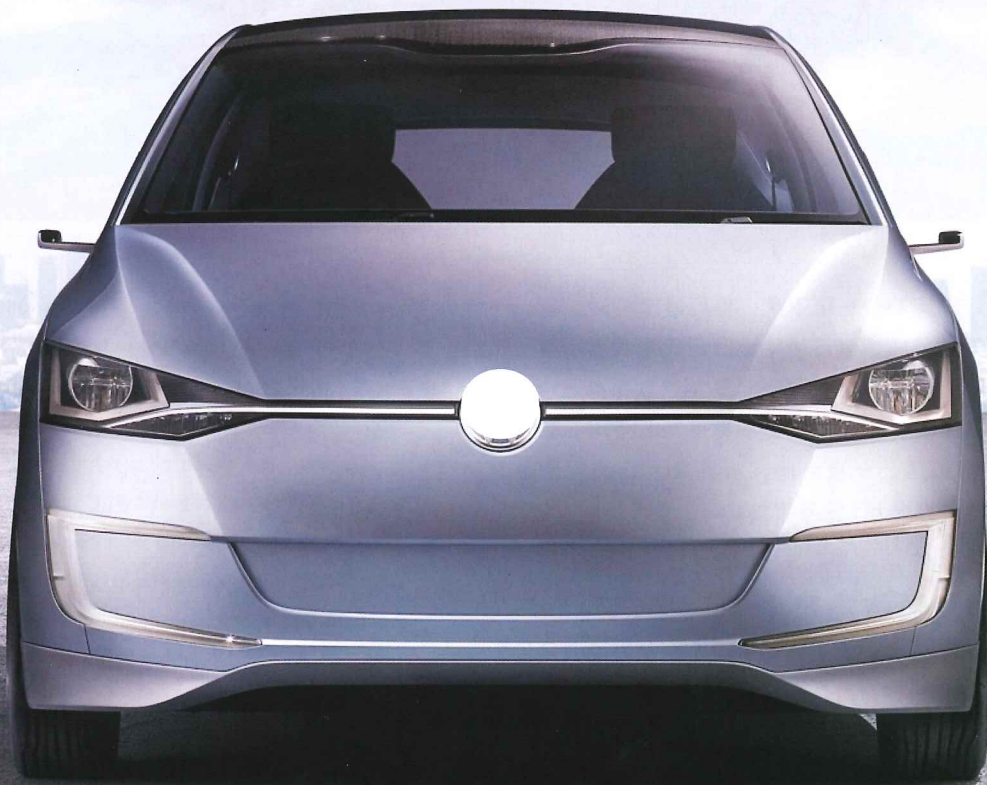
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# 世界能源格局巨变 中国能

## World Energy Pattern Changes and China's



近期，国际油价一路下跌，世界能源格局大变。一方面全球能源市场主宰者石油输出国组织欧佩克不再“减产保价”；另一方面能源大国美国原油产量稳步上升。美国《纽约时报》称，欧佩克已经不再是左右全球石油供应与价格的主导力量。一夜之间，世界最大石油生产国的美国，取代欧佩克登上了主导者的巅峰位置。

### 世界能源格局巨变

根据英国石油公司发布的《2014年世界能源统计》，2013年欧佩克的石油产量为3683万桶/日，约占全球石油总产量的42%，比2012年减产60万桶/日。然而，美国由于页岩气能源革命成功能源产量呈现上升趋势，2013年石油产

Recently, the international oil prices fell all the way, and the world energy pattern changed. On the one hand, the global energy market master – OPEC did not carry out the output reduction. On the other hand, in the United States as an energy superpower, the crude oil production has risen steadily. The New York Times said that OPEC was no longer the dominant force in global oil supply and prices. Overnight, the world's largest oil producer – the United States replaces OPEC to be in the dominant position.

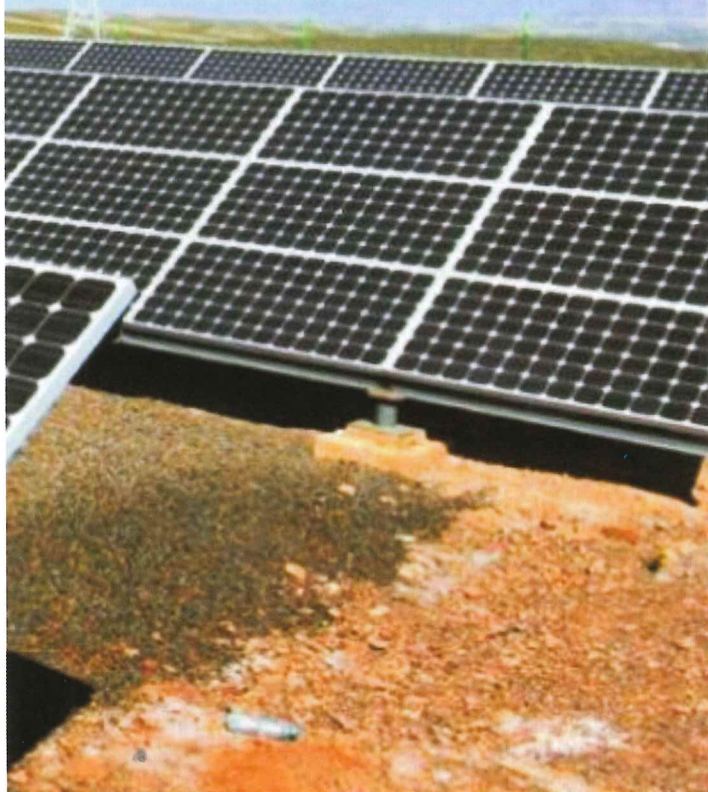
### The world energy pattern changes

According to 2014' s world energy statistics from a company in the UK, in 2013, OPEC' s oil production was 36.83 million



# 源面临挑战

## Energy Challenges



文/ 安琪儿 Text/An Qier

量为1000万桶/日，比2012年增加110万桶/日，占非欧佩克成员国总产增长量的约90%。并且其能源产量的不断上升趋势或将持续。

美国能源产量的增加不仅意味着将摆脱对外国能源的依赖，更暗示着美国有能力获取更多的能源市场份额，掌控全球能源市场的走向。

总之，以此轮油价下跌为标志，全球能源市场潜在的权力转移已经发生。欧佩克对全球能源市场的主导作用将在未来呈现削弱趋势，而美国则将提升其影响力。

中国自身的能源产量外加四大通道的进口，能源供应本身有一定的保障。但是无论从消费者还是环境的承受能力而言，中国的能源系统在一定程度上可以说处于安全警

barrels a day, accounting for about 42% of the world's oil production, a decrease of 600000 barrels a day when compared with that in 2012. In the United States, however, because of the shale gas energy tendency, the oil production was 10 million barrels a day in 2013, an increase of 1.1 million barrels per day when compared with that in 2012. This production accounted for about 90% of the total output of OPEC. This energy production will constantly rise or maintain.

America's energy production increase not only means to get rid of the dependence on foreign energy, but also implies that the United States has the ability to get more market share in the energy and control the course of the global energy market.

All in all, this round of the oil price drop marks that the global energy market potential power transfer has occurred. OPEC's leading role in the global energy market will be weakened in the future, while the United States will increase its influence.

China's own energy production and imports via four channels provide a certain security for the energy supply itself. But China's energy system to a certain extent is below the security alarm line. For China, the energy market is safer with OPEC's dominance rather than dominance by the United States.

### China's energy challenges

Complete energy security concept contains three aspects: the ability to meet current and future energy demand and security, the ability for consumers to afford the energy prices, and the ability for the environment to tolerate the energy production and consumption. In short, energy supply, energy prices and environmental sustainability are three major elements. According to the newly released report from the World Energy Council, the world energy security indicators are as follows:

First, energy supply security. In 129 countries and economies, the top 10 of the list are 1) Canada; 2) Russia; 3) Qatar; 4) Romania; 5) Colombia; 6) Denmark, 7) Bolivia; 8) the United States; 9) the UK; 10) Australia. China is ranked 19th, higher than Germany (27), Japan (62), India (76), South Korea (98). China is down because of crude oil and oil reserves.

Second, tolerance ability for energy prices. In 129 countries and economies, the top 10 of the list are: 1) the United States; 2) Canada; 3) Australia; 4) the Luxembourg; 5) Switzerland; 6) Qatar, 7) Saudi Arabia; 8) the UAE; 9) Hong Kong, China; 10) Austria. China is ranked only 82th, suggesting that China's energy prices, when compared with the consumer income, is very high. The others are Japan (20), South Korea (25), Germany (42), and India (105).



戒线以下的。比起欧佩克占据能源市场主导权而言，美国对全球能源市场的控制将对中国更具威胁。

## 中国能源面临挑战

完整的能源安全概念包含三方面：满足现在和未来能源需求的能源供应保障能力，消费者对能源价格的承受能力及环境对能源生产和消费的承载能力。简言之，能源供应、能源价格及环境可持续性三大要素。根据世界能源理事会（World Energy Council）最新发布的报告，世界各国能源安全指数如下：

其一、能源供应的保障力。在129个国家和经济体中，排在前10位的是：1) 加拿大；2) 俄罗斯；3) 卡塔尔；4) 罗马尼亚；5) 哥伦比亚；6) 丹麦；7) 玻利维亚；8) 美国；9) 英国；10) 澳大利亚。中国排名是第19位，高于德国（27位）、日本（62位）、印度（76位）、韩国（98位）。中国被拉下的原因是原油和石油储备量。

其二、能源价格的承受能力。在129个国家和经济体中，排在前10位的是：1) 美国；2) 加拿大；3) 澳大利亚；4) 卢森堡；5) 瑞士；6) 卡塔尔；7) 沙特阿拉伯；8) 阿联酋；9) 中国香港；10) 奥地利。中国排名仅在第82位，说明中国的能源价格与消费者收入相比很不“亲民”，落在日本（20位）、韩国（25位）、德国（42位）后面，只比印度（105位）略为好些。

其三、能源系统的环境可持续性。在129个国家和经济体中，排在前10位的是：1) 瑞士；2) 哥斯达黎加；3) 阿尔巴尼亚；4) 哥伦比亚；5) 挪威；6) 瑞典；7) 乌拉圭；8) 奥地利；9) 丹麦；10) 法国。中国排名仅在第127位，处于垫底的落后位置。这个排名真实地反映了中国能源和碳排放强度偏高，特别是空气、水资源的严重污染。从环境容量角度看，中国能源体系实际上处于不可持续的严峻状况。

世界能源理事会综合能源供应保障、价格、环境三要素，编制的综合能源安全指数，对世界上129个国家和经济体广义的能源安全排名，前十名是：1) 瑞士；2) 瑞典；3) 挪威；4) 英国；5) 丹麦；6) 加拿大；7) 奥地利；8) 芬兰；9) 法国；10) 新西兰。值得注意的是，美国排名在第12位，中国仅在第74位。这表明，中国的能源安全是落后的，甚至远低于没有任何本土资源的日本（第23位）。

综上所述，我们要完整、准确地理解能源安全的概念。中国能源安全的总体情况真的不容乐观。

Third, the environmental sustainability of energy system. In 129 countries and economies, the top 10 of the list are: 1) Switzerland; 2) Costa Rica; 3) Albania; 4) Colombia; 5) Norway; 6) Sweden; 7) Uruguay; 8) Austria; 9) Denmark; 10) French. China is ranked only in 127, which is at the bottom position. This truly reflects that China's energy and carbon intensity is high, especially the serious pollution in the air and water. From the perspective of the environmental capacity, China's energy system is in a severe situation which is not sustainable.

The world energy council sets up the comprehensive index of energy security according to the three factors: comprehensive energy supply security, price, and environment. In terms of energy security among 129 countries and economies in the world, the top 10: 1) Switzerland; 2) Sweden; 3) Norway; 4) the UK; 5) Denmark, 6) Canada, 7) Austria; 8) Finland; 9) French; 10) in New Zealand. It is worth noting that the United States is ranked in the 12th, China only in 74th. This shows that China's energy security is low, and is even far below Japan with any local resources (23rd).

To sum up, we need to have the complete and accurate understanding of the concept of energy security. The overall situation of China's energy security really is not optimistic.

## China's response to energy security

Facing the change of world energy pattern, how will China which is heavily dependent on energy imports deal with it?

Along with our country economy entering the new normal stage, we should inject new connotations into energy security. Energy is not only to provide the oil and heat, ensure the people's food, clothing, shelter and other basic needs, but also to relate with the country's economic development, political security and even influence the whole world.

China's energy demand has new features: large scale, slow growth, low environmental cost and the like. We must have a new energy security concept. Action Plan for Energy Development Strategy (2014 ~ 2020) has presented the long-term goals: By 2020, non-fossil energy will account for 15% in primary energy consumed; natural gas more than 10%; coal controlled within 62%. We should be in a multidimensional view of energy security, speed up the construction to the ability to adapt to the new normal energy supply stage, and promote





## 中国应对能源安全

面对世界能源格局的变化，严重依赖能源进口的中国如何应对呢？

随着我国经济进入新常态，要注入能源安全新内涵。能源不仅是提供石油、热量，保障人们生活衣、食、住、行的基本需求，而且能源更关系着国家的经济发展、政治安全乃至影响着整个世界格局。

中国能源需求呈现出总量规模大、增长速度慢、环境成本低等新特点。必须重塑新的能源安全理念。《能源发展战略行动计划(2014~2020年)》已勾画出远景目标：到2020年，非化石能源占一次能源消费比重达到15%，天然气比重达到10%以上，煤炭消费比重控制在62%以内。我们应该多维度看待能源安全，加快建设适应新常态的能源供应能力，推动能源生产与消费革命。

其一、我国将保障供给作为能源安全的优先项。过去粗放供给以满足过快增长的需求，带来高能耗产业、严重浪费及效率低下等“并发症”，如今应重视能源新技术研发，进行能源资源整合、有计划、节约型的开采利用。此外，应该实施能源供应地多样化、能源运输方式多样化及能源供应稳定化的能源安全战略，保障能源安全通道，保证能源安全。

其二、从消费者承受能力角度，实施能源价格改革。能源价格改革不应该是简单的涨价，而是与国民收入水平的提高相适应，只有降低能源消费者的负担才能有效改善中国的能源安全。

其三、应该认识到能源安全重中之重是环境的可持续性。我国高碳能源偏重的能源消费结构亟待改善，增加能源供应中的“绿色因子”。目前，我国化石能源消费占比在90%以上，其中2/3是煤炭。能源安全应由单纯的“保供给”，调整为供需安全与环境安全并重，把解决能源造成的生态环境问题上升到国家战略层面。能源发展将从数量扩张为主转变为结构调整和改善质量为主。绿色低碳发展是国际能源发展的方向，未来生态环境约束将成为能源投资建设的实质性“红线”推动能源转轨。要求我们在大力发展核电、水电和其他可再生能（风电、光伏、地热等）的同时，进一步扩大进口天然气，即便是因此降低了能源自给率，但因此带来的环境改善，实际上是增强了中国能源安全。

世界能源专家、剑桥能源创始人丹尼尔·耶金曾预言：能源重塑世界！我们也可以说：世界重塑能源！

energy production and consumption revolution.

First, China will ensure supply priority for energy security. Extensive supply which met the needs of rapid growth in the past led to high energy consumption industries, serious waste and inefficiency so on. Now we should pay attention to the new energy technology research and development; energy resources integration; and planned and economical exploitation and utilization. In addition, we should implement the diversity of energy supply and energy transportation as well as energy supply stabilization strategy. We should ensure the energy security, including energy channels.

Second, from the point of view of consumers having their ability, the energy price reform is made. The energy price reform should not mean that the price rises. The price should be accorded with the improvement of national income. Only reducing the burden of energy consumers can effectively improve China's energy security.

Third, top priority should be in the environmental sustainability. In China, the high-carbon energy structure exists. It is necessary to improve the green factor in the energy consumption. At present, the fossil energy consumption accounts for over 90%, of which two-thirds are of coal type. We should adjust the proportion between the supply & demand and the environment security. We should place the energy ecological environment problems on the national strategic level. Energy development should shift from quantity expansion to structural adjustment and quality quantity. The low carbon development is the direction of the international energy industry. In the future, ecological environment constraints will let us spend an effort in the development of the nuclear power, hydropower and other renewable energy (wind, solar, geothermal, etc.). We should further expand the gas imports. Even in the condition where this reduces the energy self-sufficiency, China's energy security can be enhanced with the environmental improvement.

The world energy expert and founder of Cambridge Energy Research Associates Daniel Yergin predicted: energy would reshape the world! We also can say: the world will reshape the energy industry.

