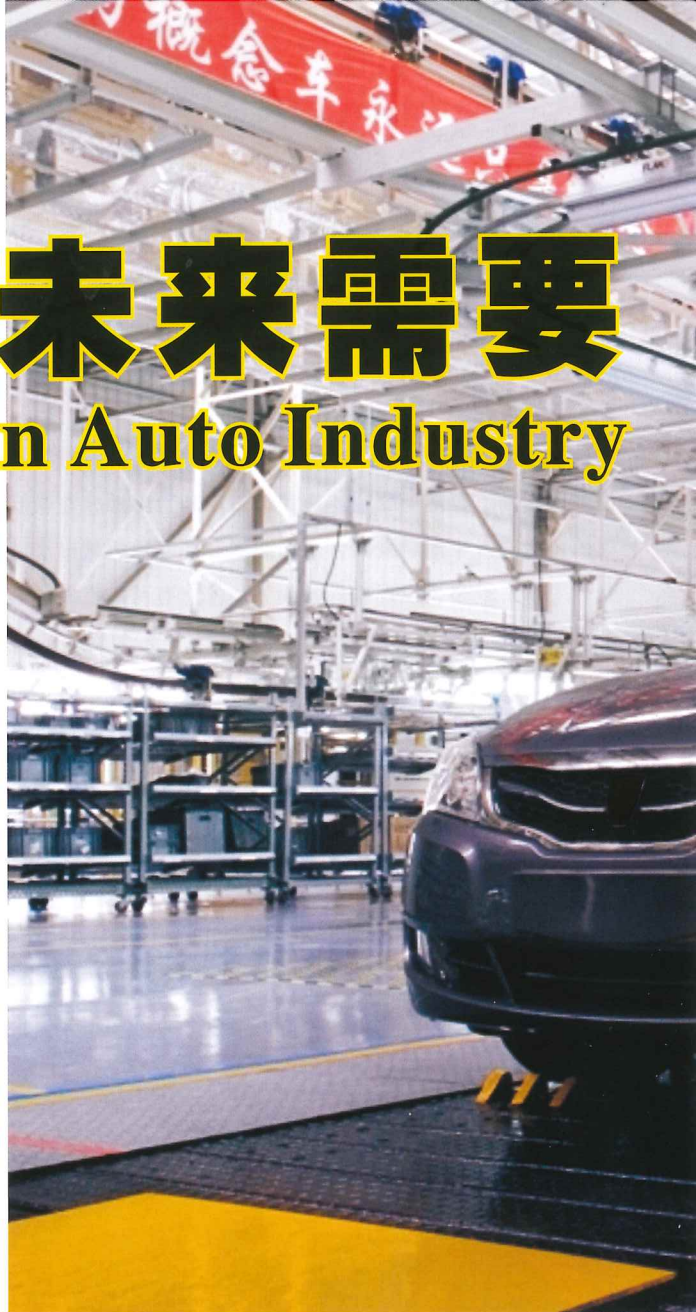


# 汽车产业未来需要

## Some Problems in Auto Industry



作为传统工业代表的汽车产业，面对新能源革命、第三次工业革命及互联网大潮，正经历着前所未有的鼎新革故技术创新。正在给中国汽车产业带来新方向，同时也给业界人士引发新问题：中国汽车产业的下一站，将呈现什么样的景象？这里，有几个似是而非问题需要厘清。

### 是IT颠覆汽车，还是汽车智能化？

互联网横空出世迅速发展，互联网思维对传统制造业，包括汽车产业产生了巨大冲击。

不久前，日立公司首次公开自动行驶等新技术，并已开始向世界汽车厂商推销相关的汽车零部件。此前，沃尔沃也展示出2015款XC60、V60和S60R-design及V40等系列搭载Sensus系统的车型。Sensus是沃尔沃新研发的一套智能车载交互系统，它包括互联、服务、娱乐、导航(Navi)、控制在内的34项车载互联功能，能为用户带来安全、便捷、智能及高效的车内外互联体验。沃尔沃希望以Sensus作为开启未来互联世界的窗口，借助云技术以及自动驾驶等科技优势，构建独树一帜的智能生态体系。

业界人士称，日立和沃尔沃之所以要加强在汽车智能方面的攻势，是因为汽车如今已逐步发展成一个高科技的集合体，并急速实现IT化。

3月3日苹果宣布，将与法拉利、奔驰及沃尔沃等合作推出CarPlay车载系统；3月11日腾讯发布“路宝盒子”，实现汽车与腾讯云服务的互联；4月百度在北京车展期间推出车联网产品CarNet；6月26日谷歌在旧金山的I/O开发者大会上正式发布AndroidAuto安卓车载智能系统……

分析人士认为，IT界咄咄逼人的“入侵”，暗藏着颠覆最

As a representative of the traditional industries, the auto industry is facing the new energy revolution, the third industrial revolution and the Internet wave, so it is experiencing the unprecedented technical innovation. This gives a new direction for China auto industry and brings a new problem: what kind of scene will be at the next stage of the auto industry of China? Here, a few issues need to be clarified.

### Does IT overturns cars or are cars intelligent?

The Internet develops rapidly. The Internet thinking has a huge impact on the traditional manufacturing industries including automotive industry.

Not long ago, Hitachi publicized for the first time new technologies such as automatic driving, and begun to provide relevant auto parts for the world auto makers. Previously, Volvo also showed 2015 version XC60, V60 and S60R – design and V40 series with Sensus system and etc. Sensus is Volvo's intelligent vehicle interaction system, and includes Internet, services, entertainment and navigation, control and the like (a total of 34 vehicle networking functions), so providing the safe, convenient, intelligent and efficient Internet experience. Volvo hopes that Sensus is a window of the future networking world. With the help of cloud technology and automatic driving technology, it can become a





# 厘清的若干问题 to Be Clarified in the Future

文/叶浅绽 Text/Ye Qianling

大移动终端——汽车及其行业的野心。所有互联网巨头纷纷进军汽车产业，基于互联网大数据所做的汽车技术研发还处在雏形阶段，但未来互联网产业对汽车产业的改变会非常深刻，它不仅会改变消费者的用车习惯，甚至会颠覆汽车产业。

然而，汽车产业界人士更愿意把当下发生的事变看作是一场产业融合，汽车与IT谁也颠覆不了谁，两者将呈现出融合的姿态。迅猛崛起的IT企业与传统汽车企业之间应该是互相融合、取长补短的关系。互联网革不了汽车的命，互联网只能使汽车更智能，使出行更便捷更顺畅。

## 是4S店，还是电商占据销售主流？

互联网给汽车产业带来的改变，不只是技术，还有销售模式。此前，沃尔沃就与O2O用车服务平台——易到用车达成战略合作，实现汽车与移动互联网的首次跨界联合。

作为一种新的发展趋势，汽车电商正显现出强大的生命

unique intelligent ecological system.

Industry insiders say that Hitachi and Volvo strengthen the effort in the smart car, because the car has gradually developed into a high-tech apparatus that has a variety of functions in IT.

March 3, Apple announced that it would be together with Ferrari, Mercedes and Volvo to launch CarPlay on-board system. March 11, Tencent released "Lobo Box" to connect the car and Tencent cloud services. In April, Baidu released CarNet in Beijing Auto Show. June 26, Google in I/O developers' conference in San Francisco officially released AndroidAuto android vehicle intelligent system...

Analysts believe that the IT industry's aggressive "invasion" lurks its ambition to subvert the biggest terminal - cars and their industry. All the Internet giants are entering the car industry. The research of the car tech based on the Internet big data is still in prototype stage, but the future's Internet industry will have a huge impact on the change of the auto industry. It will not only change consumer habits of driving the car, but also may overturn the auto industry.

Experts in the automobile industry, however, are more willing to regard what happen now as a convergence. They think the car and the IT will present a fusion between both of them. The IT enterprises and traditional





力。据尼尔森近期的数据显示，有92%的用户在买车的时候，希望通过互联网了解汽车的相关信息；在中国有86%的人愿意考虑通过互联网购买汽车。

这种态势，如今汽车电商能否实现汽车销售渠道的变革？过去传统的4S店模式还能继续占据主流吗？尽管没有人直接给出判断，但绝大多数人比较看好汽车电商的未来。未来汽车电商必定是一个趋势。未来汽车电商的发展会逐渐扩大，而随着汽车产品本身的变革，如纯电动汽车的市场化推广取得突破，也有可能进一步刺激汽车电商的发展，为汽车电商描绘出更加广阔的前景。

不过，也有业内人士称，汽车电商的整个销售循环模式未来或许会实现，但汽车毕竟不是快消品，不是交易完成就能一劳永逸的，之后还有售后等多个环节需要4S店提供服务。因此，汽车电商无法完全取代4S店的存在模式，在很长一段时间内，传统销售模式的地位不会发生动摇。

有人士认为，很难说电商能够完全取代4S店，也很难取代汽车产业现有的营销结构。4S店的负责人则说，网上购车仍然有很多难点没有办法突破，比如提车、上牌、投保等售后环节，目前还无法在线上完成。而且消费者对于购车这样的大单，在网络上消费仍有疑虑，实体店在他们看来更有保障。

虽然目前主流的汽车销售模式有诸如投入太大、成本过高、效率低下等问题，但这种模式肯定会持续很长时间，即使未来汽车电商会获得较大程度发展，但也绝对不会取代汽车4S店的销售模式，或将共荣共存模式存在下去。

## 是混合动力，还是纯电动引领新潮流？

汽车产业的未来必将是电动汽车的天下。那么，是纯电动，还是混合动力引领新潮流呢？

中国发展电动汽车已有13年，是选择纯电动，还是混合动力？还是一个待解的谜题。纯电动与混动特别是插电式混动之间的争论由来已久，自2012年《节能与电动汽车产业规划(2011—2020年)》发布至今，双方就一直处于较量状态。

从环保的角度出发，纯电动汽车瞄准的是零排放，顺应汽车电动化的发展趋势，代表汽车工业发展方向，因此成为我国电动汽车的“发展方向和重中之重”。但技术局限却制约纯电动汽车的推广。据了解，目前多数纯电动汽车的续航里程为150公里左右，只能满足城市用车需求。

相对纯电动汽车而言，由于对基础设施的依赖程度较低，

cars should integrate with and complement each other. Internet can make the car more intelligent and the travel more convenient and more smooth.

## 4S or E-business to occupy the mainstream?

The change of the car industry caused by the Internet is of technical and sales-model type. Previously, Volvo and O2O car service platform reached a strategic cooperation, realizing the cross-border integration with the mobile Internet for the first time.

As a new developing trend, the automotive E-business shows strong vitality. Nielsen's recent data show that 92% of users at the time of buying a car hope that through the Internet they can learn about car related information; In China, 86% of people are willing to consider buying a car via the Internet.

In this situation, can the car E-business change the car sales channel? Can the tradition 4S model still occupy the mainstream? Although there is no judgment, many people prefer the car E-business model in the future. Auto electrical business must be a trend in the future. Future development of the electrical business model will gradually expand. With the car product itself changing, for example, a breakthrough in the pure EV market promotion, the car E-business will rapidly develop, having more broad prospects.

However there are some people who say that the whole sale cycle may be realized, but due to the consumption characteristics of the car, the 4S model still is needed in a lot of links of the after-sales service. Therefore, car E-business cannot completely replace the existing 4S shops. In a very long period of time, the status of the traditional sales model will not waver.

Some people believe that it's hard for the e-business to completely replace the 4S model or the existing marketing structure in the car industry. The head of the 4S shop says that there still are many difficulties in the online shopping of cars, including the delivery of the car, registration, insurance and etc. In addition, consumers still have doubts on the online shopping. For them, the entity shops have a better guarantee.

Although the mainstream car sales model still has some issues, e.g., large investment, high cost, and low efficiency and so forth, it can continue for a long time. Even if the e-business model will develop rapidly in the future, it cannot fully replace the car 4S shop model or it may co-exist with the 4S shop model.

## Does the hybrid car or pure EV lead the trend?

In the future of the auto industry, EV will be a leader. So, will pure electric car or hybrid car lead the trend?

Development of electric vehicles has a history of 13 years in China. Will we choose the pure EV or the hybrid car? This still is an unanswered mystery. The debate on the pure electric car and hybrid car especially plug-in hybrid car has lasted for a long time. Since 2012 when the energy saving and the electric car industry planning (2011-2020) was released, the two sides have been in a state of battle.

From the perspective of environmental protection, pure electric vehicles are aimed at zero emissions, conforming to the development trend of automobile electric cars and being on behalf of the automotive industry development direction, thus being the development direction and priority for electric cars. But technical limitations restrict promotion of pure electric vehicles. We have learned that, at present most of the all-electric cars have their mileage of 150 km, so can only meet the demand of urban transport.

On the other hand, due to the low degree of dependence on infrastructure, plug-in hybrid cars are more suitable for the present



插电式混合动力将更适用于目前的消费环境。

就纯电动与混动比较而言，应该更重视混合动力，用同样力气去推广，混动产生的节油效果更大。可以说，放眼20年的未来，纯电动能否普及不得而知，但是混合动力普及已经是可以看到的事情。

业内专家指出，不管纯电动还是混动，中国电动汽车的发展都应该立足实际、着眼未来。纯电动与混合动力“两条腿走路”，或是更加理性的选择。

## 是“养家糊口”，还是“无人驾驶”？

在诸多论坛、会议及沙龙上，新闻媒体铺天盖地炒作“车联网”、“智能汽车技术”、“无人驾驶技术”、“V2V智能汽车技术”及“远程无线充电技术”等等概念，与之形成鲜明对比的是电动汽车上下游产业“亏损”、“债务”、“兼并”及“破产”的企业“哀鸿遍野”。

毫无疑问，“智能汽车”等是未来的重要方向，仅仅就目前来看，包括无人驾驶汽车、车联网等技术还不是一个能够“养家糊口”的技术和产品。这些对于汽车制造商应该分清孰轻孰重。

摆在汽车制造商面前很现实的问题，一要生存，二要发展。当下的生存最重要，生存就要将自己的产品销售出去赚取利润。

对于如何选择最时髦的技术还是务实的技术，没有什么标准答案。如何选择的关键是要贴合每家汽车制造商自身的情况，能够“养家糊口”为依循。

如果你是土豪级别的企业，你手里握有大量的先进储备，而需要与战略投资商合理规划，拿出足够的资金投资一些未来技术无疑是正确的。

如果你当下资金链吃紧，或公司刚刚成立，去主打“车联网”这样的大概念，未必是个好的策略。此前，多家新兴电动汽车制造商，包括Coda汽车、菲斯克汽车，都因资金链的问题陷入困境。企业需要清晰预测自己产品的续血能力，有能力撑到最后，去迎接车联网或者智能化汽车的到来。

事实上，来自市场方面的信息，汽车制造商要比当下新闻更加务实和稳重，遵循多用成熟技术、慎用新兴技术的理念，像能够跑远路的司机那样，驾车远行不要像赛车手那样见缝插针超几辆车，真的没有太大必要，而是要做足自己的功课，在长途行驶中确保平安远行到达目的地。

consumption environment.

In terms of pure electric and hybrid comparison, we should attach more importance to hybrid cars, and spend the same effort to promote them. For them, the oil-saving effect is better. We can say, in future 20 years, whether pure electric cars can popularize is unknown, but the popularizing the hybrid cars is already available.

Industry experts point out that, with regard to both pure electric and hybrid cars, we should be based on actual conditions and focus on the future. It is a more rational choice for us to develop the pure electric and hybrid cars at the same time.

## "Breadwinner" or "unmanned"?

In many forums, meetings and salons, the concepts including car networking, smart car tech, unmanned car tech, V2V intelligent vehicle tech, remote wireless charging tech and so forth become very popular. In contrast, the words about EV such as loss, debt, merger, and bankruptcy are frequently seen.

There is no doubt that the smart car is the important direction of the future. Just for now, the technologies include driverless cars and car networking technology are yet not a good "breadwinner". The carmakers should have their due consideration on them.

The realistic problem for carmakers is to survive at the first and then develop. The survival is the most important, and survival means we should sell products to get a profit.

For how to choose the most modern technology and practical technology, there is no standard answer. The key is to consider the carmaker's own situation and follow the principle of at first being a breadwinner.

If you have much money and advanced equipment and you want to be with the strategic investor for a reasonable planning, then it is right for you to come up with enough money to invest in some future technology.

If you are the tight capital chain or your company has just established recently, then it not necessarily is a good strategy to implement the car networking concept. Previously, several emerging electric car manufacturers, including Coda and so forth, because of the problem about the capital chain, were in trouble. Enterprises need to clearly predict their ability to renewal of blood products, have the ability to hold in the end, in order to greet the arrival of the car networking or smart car.

In fact, the market information shows that carmakers should be more pragmatic and prudent, adopt the mature technology and have a careful attitude to the emerging technologies. We should be like the drivers to run long distances, who always spend a great effort for preparatory work. It is not necessary to be like a race car driver who only focus on what happen before his eyes. In the long drive, the drivers should ensure safe arrival at destination.







# 用互联网思维改变汽车消费习惯

## Using the Thinking of Internet to Change Car Consumption Habits

### —— 电动汽车新型商业模式

#### — Electric Car New Business Model

中国电动汽车产业赶超世界先进水平还有一段路要走，但是，电动汽车为用户提供个性化出行服务却是现实的课题。电动汽车运营商这个角色是未来世界和中国市场不可或缺的。目前国家发展电动汽车是比较紧迫的，但基础设施建设，维护保养等都有问题。这是创建电动汽车运营新商业模式非常好的机会。

#### 汽车共享模式的启示

在国际上，大家都认为使用汽车共享的模式，会成为电动汽车商业模式的重要方向。国外有运营比较成熟的例子，第一个是法国，还有一个是德国。它们的汽车分享模式，一种是固定地点的汽车分享，另一种是移动式的汽车分享。汽车可以随时租、随时还，而且取得了非常成功的运营效果。

文/ 商承社 Text/Shang Chengshe  
China Electric Car Industry still has some way to go in catching up with the advanced world level, but, there is a real issue on electric cars to provide users with personalized travel service. The role of the electric car carrier is indispensable to the world and China in the future market. At present it is more urgent for the country to develop the electric car. Some problems are in the infrastructure construction, maintenance and so on. This is a very good chance to create a new electric vehicles business model.

#### Car-sharing mode

In the world, everyone agrees the car-sharing mode, that will become an important direction of the electric cars. Foreign countries have examples of mature operation, the first is France, another is Germany. For their car sharing model, it is classified into the fixed and mobile types. Cars can be rented and returned at any time, and very successful operating results have been achieved. At present, car makers in Hangzhou, Shanghai, Shenzhen, including Jianghuai, have known the successful car time-dividing rental mode. Especially with the thinking of the Internet and Internet



目前，中国杭州、上海、深圳，包括像江淮北汽汽车制造厂家，它们都已经认识到成功的汽车分时租赁模式，将定向电动汽车运行的租赁模式。特别是用互联网的思维和互联网技术手段来改变汽车的消费和驾驶习惯，这是国际上正在引发的一场前所未有的变革。

当前，国际知名的互联网企业——传统互联网强力的企业，它们强力的手段，结合整个汽车生产制造业，提供了一个非常联网的模式。

现在炒得很热的“大数据”，它给我们提供了一个非常方便的结构，一个道路、交通及环境数据，无论涉及到自己、驾驶人员、车厂及交通管理员，这些数据都是宝贵的财富，可以向电动汽车的产业链的生产企业借鉴，无私分享。

## 电动汽车是互联网的终端

说到交通运营，关键的是汽车数量大、机动性强，



车、人和道路的协调，一直是一道难题。这在整体运营解决方案中，必定会涉及智能交通。

由于电动汽车自身的技术特性、技术结构，它区别于传统燃油汽车，很便于联网，成为数字化的终端。电动汽车不仅是传统的四个轮子跑在路上的载体，而且未来电动汽车，一定是高度数字化，高度电子化的一个互联网性的终端。

同时，车辆按“汽车分享”运营模式，可以提高消费者的使用效率。当下，无论是城市还是乡村，汽车大部分时间是停置在停车场和车库里，跑在路上是为了上班、旅游。目前，以互联网模式租赁，正在极大地冲击着传统汽车租赁行业。

technology, the car consumption and driving habits are changed. This is causing an unprecedented change in the world.

At present, the international well-known Internet companies adopt the powerful means to deal with the whole car manufacturing industry, providing a model which is very connected.

Now the big data are popular. It provides us with a convenient structure, a road, traffic and environment data. Regardless of coming to oneself, driver, car and the traffic administrator, these data are valuable for producers in the electric car industry chain and can be shared in a selfless manner.

## Electric car is the terminal of the Internet

When it comes to traffic operation, the key issue is that the car number is big, that the maneuverability is strong, and that the coordination should be made between the cars and roads. This is a difficult problem. In the overall operation solution, the intelligent transportation is involved.

Because electric cars are different from traditional fuel cars in technical features, technical structure and so forth, they are very easy to be networked, becoming a digital terminal. The electric car is not only the carrier of the traditional four wheels running on the road, but also in the future, will be highly digital and highly electronic as an Internet terminal.

At the same time, the vehicle according to the "car sharing" operation mode can improve the use efficiency of consumers. At present, whether in the cities or the countryside, the car is parked in a parking lot or in the garage in most of the time, and its running on the way is for the purposes of working and travelling. At present, the Internet rental mode is greatly impact the traditional car rental industry.

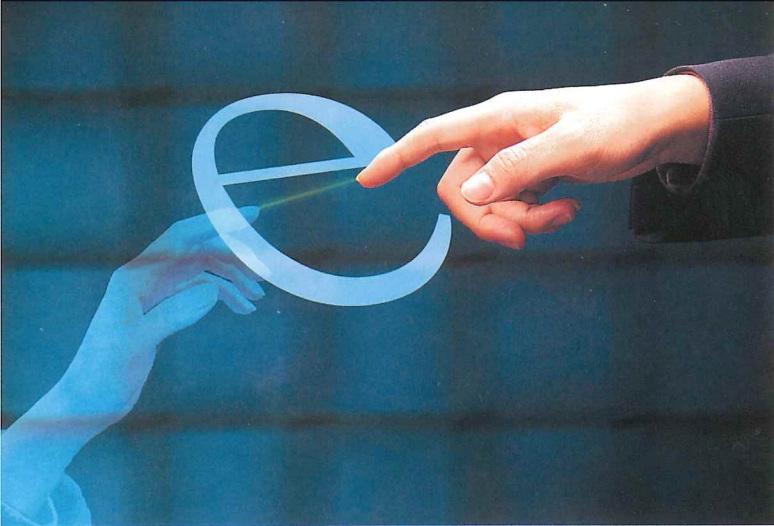
The concept of car rental O2O is very popular. 45% of users do not yet use the the taxi rental software. Now, we know the taxi rental software: DIDI, showing that the kind of software still has a big space. Last year, after introducing PP car rental mode in Beijing, there are 30 thousand taxis in the car rental online of PP. They are confident that after one year, the car rental transaction amount will exceed that of Shenzhou Car Rental whose rental scale is 50 thousand cars. For the companies using the Internet business model, their growth rate is very high.

## Build platform solutions

Platform solution is to build a whole operation solution, which







租车O2O这个理念很热潮, 45%用户尚未使用打车租车软件。大家现在滴滴打车很潮, 说明租车软件仍有加大的空间。去年, 北京引入PP租车以后, 在PP租车线上的出租车已经有三万辆, 他们有信心在一年后, 平台交易额超过神州租车。神州租车规模为五千辆, 以互联网运行的商业模式推广的公司, 成长速度是非常快的。

## 打造平台解决方案

平台解决方案是要打造一体运营解决方案。电动汽车充电、运营维护、电动车辆和资金等, 提供的品牌叫“电动汽车立体公交”。与大家公交不要混淆, 公交是公共出行的交通工具, 这里面涵盖了公交车物流、各种车辆及微循环车等, 打造一体运营解决方案。同时, 大量应用包括物联网、车联网的技术, 又有互联网的技术和大数据分析做智能平台, 提供了智能化公共交通平台解决方案。无论快速公交, 电动出租车和个人租赁, 包括运营平台, 已经达到成熟开放的状态, 面向车厂, 个人消费者, 欢迎一切客户。

这个平台既为政府部门和各个公共关系部门, 还为包括车厂的所有企业提供成熟的各种运营模式。大家都可以借鉴分享, 包括驾驶者可以通过各种查询、支付、延伸等服务, 包括未来打造多频合一, 你的个人电脑, 手机、车载机, 家里边电视, 多频合一, 在哪里都可以了解到车辆运营的状况, 运营的轨迹。

同时, 电动汽车最复杂的是它的检测和售后服务, 运行方案是整体的结构, 包括了电动汽车的定制化运营。还包括电池, 特别是逐渐探讨电池的回收利用。在一些方面做试运行, 同时包括车型、充电等等。

## 实施O2O营销模式

involves in electric vehicle charging, operation and maintenance, electric vehicles and funds, etc., to provide the EV public transportation. Public transportation covers all kinds of vehicles and microcirculation vehicles and etc., to build a whole operation solution. At the same time, a large number of applications are adopted including Internet, networking technology, and data analysis. There is a status of open for the rapid public transportation, electric taxi, personal rental, operation platform. It is opened to the car makers, and customers so forth.

The platform provides a variety of mature operating modes for government departments and public relations departments as well as enterprises. Everyone can use it. Drivers can enjoy the query, payment and extension services. In the future, it will include the personal computers, mobile phones, home TV sets and etc. At any



place, you can know about the vehicle operation condition and etc. At the same time, for the electric car, the most complex contents are the testing and the after-sales service. The operation scheme is overall structured, including the customized operation of electric vehicles and batteries which are used and recycled. In some aspects, the pilot run can be made, including models and battery charges and so on.

## Implementation of the O2O marketing model



O2O营销模式在这里通过多种媒体进行推广，品牌推广，线上线下各种活动推广。在广泛市场研究之后，定价策略上会综合考虑十大因素，把客户定位为定向商务客户和普通个人消费的租赁客户。管理系统平台通过移动互联网，包括各种各样的媒体，自媒体多渠道去进行运营推广。同时在各个环节上突出简便易行的特色，多渠道的预定方式，多选择的支付方式。

借助物联网的发展创新电动汽车商业模式，作为租赁运营也可以介入公交。有很多开发区是比较偏远的，有上万人要解决上班的问题，不得不拿大量的钱，跟公交公司合作，在开发区做大量的投资以后，又会出现一些空载的效果。如果用方案，很好管控交通线路，这个钱可以成倍增长。可以合作的模式做一个合资公司来解决微公交和传统公交的线路运营，实现一个双赢的局面。

未来要提高平台系统的科技水平。第一个能源互联网，能源互联网现在是一个比较超前的概念。电动汽车和充电设施既是未来能源物联网智能生态系统终端，在未来不久可以设想到你坐在家，或者坐在车辆里面，你可以通过自己的手机电脑，手指一划，就把你用不完的能量转给别人。同时，关注汽车相关产业的各种各样的先进技术纳入车辆载体。此是后话。

O2O marketing model here is promoted through a variety of media, including brand, offline and online. After extensive market research, pricing strategy will take 10 factors into account. The customer is targeted as a business customer or a common personal customer. The management system platform carries out the promotion through the mobile Internet, including a variety of media. At the same time, in each link, the simple feature is highlighted. It can provide the multi-channel reservation mode and the multi-choice payment.

With the development of the Internet of the goods, we can innovate the electric car business model and adopt the leasing operations in the public transportation. Many development zones are relatively remote and have to spend much money to cooperate with the public bus companies in order to solve the traffic problems for their workers. If the solution is adopted, then the traffic lines can be well controlled. The cooperation model can be that a joint venture company is set up to solve the issues regarding the mini public transportation and tradition public bus line operation. This can achieve a win-win situation.

In the future, we should improve the level of the technology in the platform system in the future. The energy Internet now is a a more advanced concept. Not only electric vehicles and charging infrastructure will be the terminal of the intelligent ecological system in networks of goods and energy, but also in the near future, you can sit at home and the car to transfer your excessive energy to the other people through the mobile phone, computer and etc. At the same time, we can pay attention to all kinds of advanced technology adopted in the vehicle. This is another story.

