

电动汽车市场主导权归何处？

To Who does Leadership in the Electric Car Market Belong?

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作为新能源汽车的典型代表，我国电动汽车市场因其良好的发展前景和政府的大力扶持广受青睐。汽车、电力、石油石化等行业大型厂商纷纷涌入，凭借技术、能源、基础设施等各方优势抢占市场。整车厂有“资质”，充电站运营商靠“圈地”，电动汽车市场主体各显神通，相互制衡。

The electric car is a typical example of automobiles powered by new forms of energy. The Chinese electric car market has been favorably appraised, thanks to its prospects for future development and generous government support. Big players in the automobile industry, the electric power industry, the oil and chemical industries, among others, have been trying to get into the act, to grab as large a share of the market as possible by securing technological, energy resource or basic infrastructure advantages. Automobile plants can claim “innate capital”, while operators of battery recharge stations resort to “land enclosure” tactics, in a lively scene in which different parties in the electric car market bear different strategies to bear in order to keep one another in check.

整车企业的“资质特权” Assembly Plants’ “credential privileges”

国内的汽车资质政策赋予了整车企业生产电动汽车的特权，直接决定了整车企业在市场的重要地位。要做电动汽车，首先要有汽车的生产资质，然后才有可能去申请电动汽车生产资质，最后才能投入电动汽车生产。没有资质做出来的车，只有在地方保护的情况下才能上路使用，根本无法实现市场化运营。根据工信部《新能源汽车生产企业及产品准入管理规则》，我国新能源汽车企业的准入条件十分严格，符合条件的企业基本限定在已有的整车生产企业或改装类商用车生产企业，再经过各项审查审核，实际可以投入电动汽车生产的企业十分有限。基于工信部的这一准入规则，整车企业掌握了电动汽车关键部件—电池、电机、电控的各项标准配置权。整车企业在电动汽车产品公告中规定了关键部件的配置要求，其中包括了底盘特定的电池和电机。电池厂必须根据整车企业出产的电动汽车电池规格来提供自身产品，充电运营商同样需要根据整车企业规定的各项标准

来经营电池租赁业务。全国的整车资质和底盘资质处于固定状态，没有资质的汽车企业申请工信部的资质认定程序复杂且耗时较长，而充电运营商等外围企业则根本无法涉足电动汽车制造领域，既没有进入汽车生产行业的资格，也不具备指导生产整车的技术能力。汽车的资质管制制度使得整车企业控制了电动汽车生产的主动权，这是中小汽车企业和相关运营商无法企及的。

Current state policies have granted assembly plants the credentials to make electric cars. In doing so, these policies have straightforwardly decided the dominant position of assembly plants in the electric car market. To make electric cars, the first order of business would be to secure the credentials for doing so, and only then can one proceed to apply for the certification for such qualification, and only when this has been obtained can production commence. Cars made without such certification are permissible on the road under local protectionist policies, and as such are fundamentally incapable of competing freely in the market. According to the “Management Rules for the Production and Certification of Automobiles using New Forms of Energy” published by the Ministry of Industry and Information Technology, the entry bar for businesses with aspirations to make automobiles using new forms of energy is rather high. Most businesses that qualify have been those that already assemble cars or work in conversion. And then with the imposition of multiple requirements, the number of businesses that can actually reach the stage where they can produce electric cars is very limited.



理想状态下，未来充电站运营很可能会主导电动汽车市场。但在现有汽车资质政策保持不变的情况下，无法出现运营商、整车厂、电池厂三足鼎力的局面，更不会出现运营商一家独大的局面。在手机行业，运营商掌握无线网络的核心技术，手机厂家根据网络生产与之匹配的产品，与之相反，电动汽车整车厂掌握核心，运营商和电池厂必须根据整车的各项标准来生产。底盘产品公告绑定了电池，而只有车厂才有能力上底盘产品公告，充电站运营商和电池厂必须根据整车厂的选择来选择相应的电池和电机。整车厂凭借资质成为行业核心，而电池厂、运营

商必须依附整车厂。

Ideally, battery recharge stations of the future will dominate the electric car market. Now, however, under the existing certification policies for electric car manufacturing, a triadic situation in which battery station operators, car assembly plants and battery makers each checks and balances the other two players could not materialize, still less could one in which battery station operators take the reign into their own hands. In the mobile phone industry, operators master the technologies essential to the wireless network, and mobile phone manufacturers must make whatever would be compatible with the requirements of the wireless network. On the contrary, it is the electric car assembly plants that have the privilege of knowledge of the relevant core technologies, and it is battery station operators and battery manufacturers that must operate and produce in accordance with the requirements defined by the assembling process. Chassis announcements impose restrictions on the batteries to be used, and only car manufacturers can make these announcements, operators of battery recharge and replacement stations are the caboose in regard to the choice of battery and engine. Car assembly plants must become the heart of the industry on the strength of their certified credentials, while battery manufacturers and station operators must function as their subordinate.

充电站运营商的“圈地运动” The “Land Enclosure Movement” by the battery recharge station operators

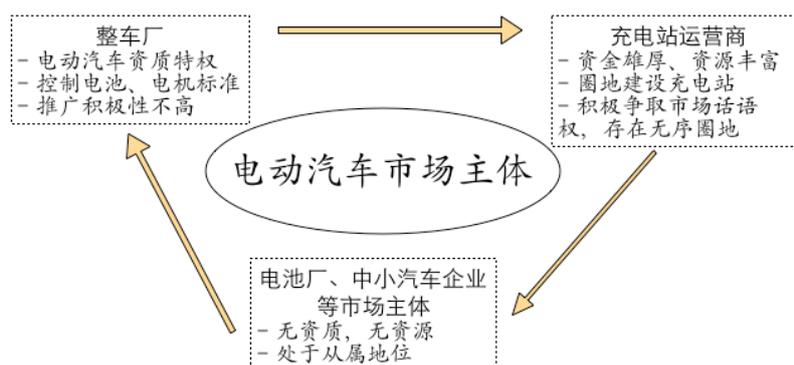
尽管电动汽车的市场前景普遍看好，但其在性能和价格上尚不具备与传统汽车竞争的實力，这也是整车企业目前发展电动汽车积极性不高的原因之一。而充电运营商却可以通过车辆运营（例如电池租赁）的方式来弥补电动汽车在充电时间等方面的劣势，通过显著低于油价的电价来吸引消费者的目光...虽然没有对电池等关键部件的选择权，充电运营商却在利用自身的资源优势提高电动汽车市场竞争力，以此谋求在新能源领域分得一杯羹。

Even though the prospects for the electric car market are roundly regarded to be good, in regard to their functionality and price, electric cars still stand at a disadvantage compared to traditional cars. This is one reason why car assembly plants have been reluctant to get into the electric car making business. But battery recharge station operators are able to find ways (such as through battery rental) to mitigate whatever disadvantages electric cars suffer in regard to recharge time. Or they may attract consumers' attention by flagging electricity prices that are considerably lower than those of gas. [So] even though battery station operators have little say in matters relating to the key components of the battery, they are nonetheless working actively to enhance their competitiveness by making optimal use of what resources are available to them. By doing so they seek to secure their share of the pie that is new forms of energy.

无法涉足生产领域，整车厂之外的其他投资者瞄准了充电站市场，力争在电动汽车基础设施建设和日常服务领域抢占先机，电动汽车充电站成为投资的焦点，“圈地运动”如火如荼。电动汽车关键零部件——动力电池（包括其附件如电池箱及附属管理系统等）将整车厂和充电站运营商联系在了一起，整车厂和运营商现在和将来的主要矛盾就体现在动力电池及其附件上。动力电池的各项标准由整车

厂决定（资质的问题），但动力电池的更换和充电是由充电站运营商来控制的。动力电池相当于充电站运营商的产品，运营商需要全面负责电池的保养更换维护等工作。以电力、石油石化为首的大型企业纷纷投入到充电站建设的争夺战中。电力企业凭借电力资源通过电价优势来影响充电站市场。石油石化企业控制着汽车的加油服务网络，完成“加油”到“充电”的转变，便可吸引大量客流。虽然不具备汽车生产资质，充电运营商通过占领运营服务市场和投资电动汽车充电技术研发来提高自身影响力，以此来扭转整车厂掌控全局的现状。尽管政府尚未出台充电站用更换型动力电池的标准规范，充电站运营商已经通过圈地、技术引进、购买整车等多种途径，想方设法地争取电动汽车市场的主动权。

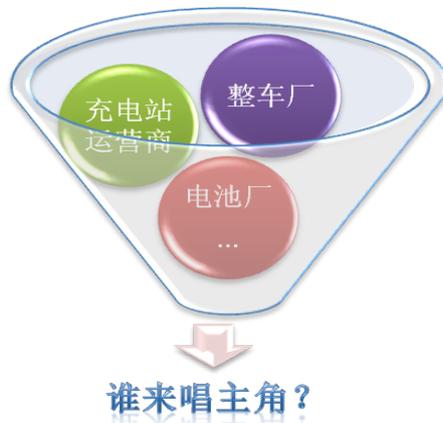
While unable to make cars themselves, parties other than the assembly plants in the electric market business are all focusing on the battery recharge aspect of the market, trying to stake their claim on as large a share of market relating specifically to infrastructure construction and maintenance services. As such, battery stations have become popular with investors, spurring a ferocious “land enclosure movement”. The key part of the electric car, namely, the fuel cell or the battery (including components such as the battery case and auxiliary management system), are what the connection between the assembly plants and the battery recharge station operators consists in. Both their current conflict and their future conflict will have primarily to do with these fuel cells and their attachment parts. While the various requirements the fuel cells must meet are defined by the assembly plants (owing to their position with respect to manufacturing credentials), the recharge and the replacement of these fuel cells fall within the purview of the station operators. The fuel cells or batteries, therefore, are tantamount to the station operators’ own products, and these stations must be fully responsible for the care, replacement and maintenance of these products. Large corporations in the electric power, petroleum and chemical industries have one after another entered the tug of war to build more battery recharge stations. The electric power industry tries to make use of its advantages such as afforded by the competitive price of electricity relative to petroleum. The petroleum and chemical industries, because they are currently in control of traditional cars’ gas supply network, would stand to attract large volumes of customers should they complete the transition from “add gas” to “recharge battery”. Even without the certificate to make electric cars, battery station operators can nonetheless increase their own influence and mitigate their passivity relative to the assembly plants by staking out the operation services market and by investing in R &D in battery recharge technologies. While the government has yet to set universal standards for electric car batteries, battery station operators have already begun to take the initiative in the electric car market by means of the “land enclosure movement”, technological improvements, car purchase, among other strategies.



市场由谁主导？谁来决定？ Who is the leader?

整车企业拥有电动汽车制造的资质，但考虑到电动汽车盈利的不确定性以及电池厂、充电站运营商的潜在竞争威胁，整车厂推广电动汽车的积极性并不高。虽然以研发电动汽车之名获取了政府的资金扶持，但电动汽车推广进展缓慢；汽车充电站建设形势大好，各大央企、国企专注于圈地建设，但已建充电站实际运营的少之又少，加上充电运营商无序的圈地活动，将来造成浪费的可能性极大。电动汽车市场需要一个主导力量来确立市场结构和经营模式，由谁来唱主角？又由谁来决定？需要我们深入思考。

Car assembly plants are certified to make electric cars. However, cognizant of the uncertain profit potentials of electric cars, and adding to that the threat of competitive pressures coming from battery manufacturers and battery station operators, car assembly plants have in fact not been particularly keen on marketing their own products. Even though they have secured government funding by claiming to do R & D about electric cars, they are slow to promote what they have made. [By contrast], the situation with the construction of battery recharge stations could not be more different, with the central government-owned and otherwise state-own businesses actively participating in the land enclosure movement. However, among battery recharge stations that have already been built, those that are in operation are few and far between. Compound this with the fact that disorderly grabbing of the land to build still more stations, the likely overall result would be vast wastage in the future. The electric car market needs genuine leadership so that the appropriate market structure and management model can be clearly defined. Who will provide this? And who will decide who will provide this? These questions are the worthy subjects of careful and deep reflection.



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