Intelligent and Connected Vehicles (ICVs) in China
中国的智能网联汽车

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Our new report on ICVs in China
我们关于中国智能网联汽车的最新报告

Available on:
下载地址：
icv.sustainabletransport.org

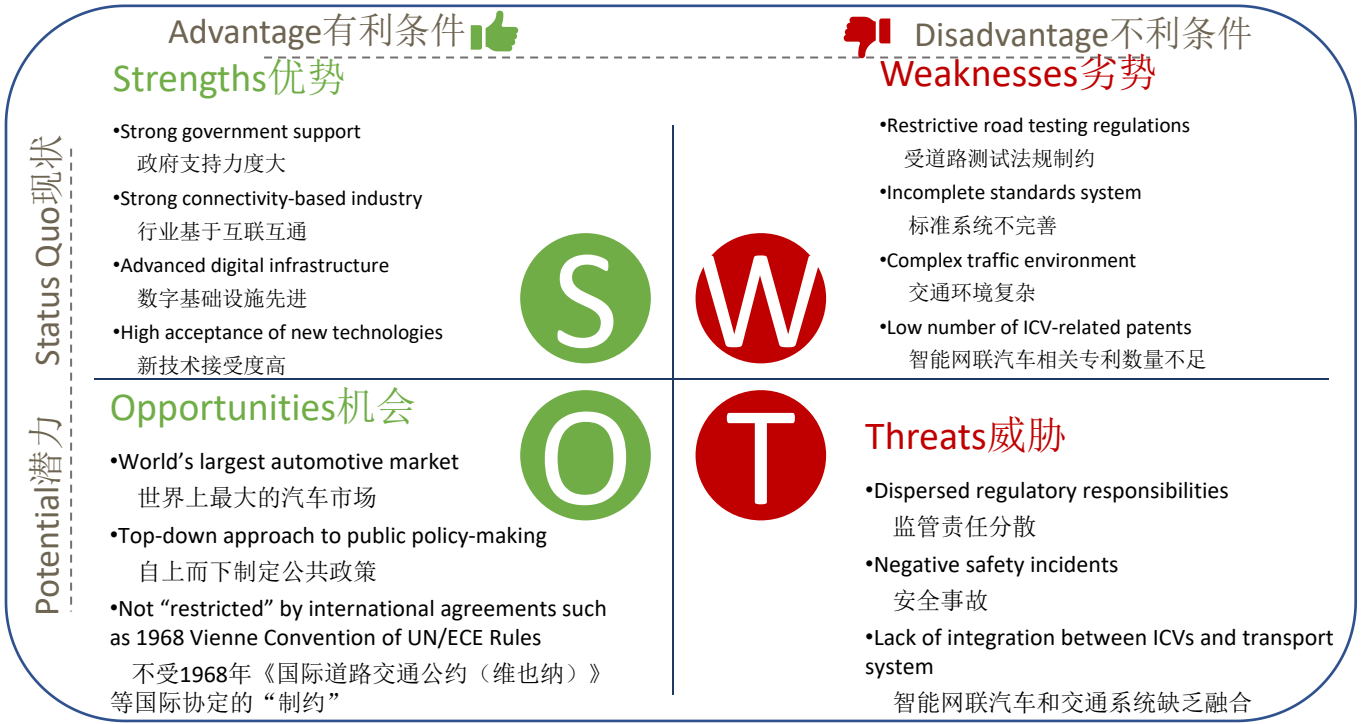
Terminology and action fields:
术语和活动领域：
What are ICVs? What drives the developments in China?
什么是智能网联汽车？哪些因素推动了智能网联汽车在中国的发展？

Breakdown of the industry:
行业细分：
Who are the main players? What are the latest market developments?
主要参与者有谁？市场最新的发展如何？

Regulatory environment:
监管环境：
Who are the regulators? What are the latest policy developments?
有哪些监管部门？最新政策走向如何？

SWOT Analysis: SWOT分析：
What are the strengths, weaknesses, opportunities and threats?
智能网联汽车有哪些优势、劣势、机会和威胁？

SWOT Analysis of ICVs in China中国智能网联汽车的SWOT分析



What will be the environmental impact of ICVs?
智能网联汽车的环境影响

Three main variables三个主要变量

Best-Case Scenario:
最佳情景：
Reduction of CO2 Emissions
减少二氧化碳排放

1	Total miles travelled 总行驶里程	Decrease in total miles travelled 总行驶里程下降 • Rates of vehicle ownership drop 汽车保有量降低 • Number of vehicles on roads decreases 路上车辆减少 • Utilization rate per vehicle increases 每辆车的利用率升高
2	(Fuel-)efficiency of vehicles （能源）效率	Higher (fuel-)efficiency （能源）效率更高 • Economic driving through automation 自动驾驶经济高效 • Strong potential of electric drive 电驱动潜力巨大
3	Traffic congestion 交通堵塞	Better flow of traffic 交通通畅 •Collaborative automated / connected driving •自动协同、网联驾驶 •Platooning 队列行驶

What will be the environmental impact of ICVs?
智能网联汽车的环境影响

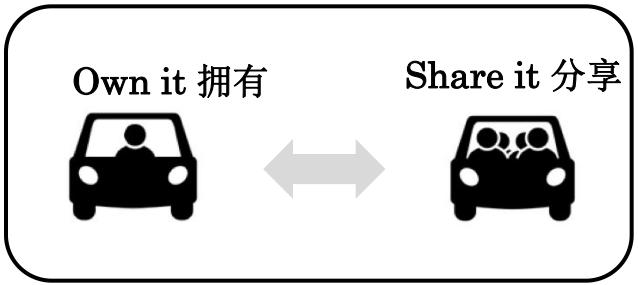
Three main variables三个主要变量

Worst-Case Scenario:
最差情景
Increase of CO2 Emissions
增加二氧化碳排放

1	Total miles travelled 总行驶里程	Increase in total miles travelled 增加行驶总里程 •More frequent and longer trips 出行更远更频繁 •New groups of "mobility users" 新增"机动出行"群体 •Weakening of public transport 削弱公共交通
2	(Fuel-)efficiency of vehicles （能源）效率	Electric drive relies on unclean power supply 电驱动依赖非清洁能源发电
3	Traffic congestion 交通堵塞	Worse flow of traffic 交通流量增大 •More vehicles on the road as people shift from public transport to ICVs 人们从公共交通工具转向智能网联汽车，上路车辆增多

The key questions evolve around the future usage of ICVs
智能网联汽车未来使用的关键问题

Two contrasting scenarios: 两种不同的情况



Questions for policy makers: 政策制定者需要考虑的问题：

- Which user scenario will dominate?
- 哪个用户场景占主导地位？
- How can an increase in total miles travelled be prevented?如何防止总行驶里程增加？
- What can be the role of public transport?
- 公共交通可以起到什么样的作用？
- How can an increase in car ownership be prevented? 如何防止汽车保有量的增加？

! **Influence Factors影响因素**

- Regulatory framework
- 监管框架
- Market penetration of ICVs
- 智能网联汽车的市场渗透率
- Acceptance of shared solutions
- 共享解决方案接受度
- Modes of public transport
- 公共交通模式
- State of automation
- 自动化程度

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Thank you for your attention! 谢谢您的关注！

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