

电动汽车充（换）电站运营商如何争取话语权？

How to Ensure that the Voices of Battery Recharge (Replacement)

Station Operators are Heard?

中国经济体制改革研究会公共政策研究中心

China Research Center for Public Policy

长策智库

ChangCe Thinktank

www.changce.org

March 2011

(讨论稿 Draft)

在国家政策和资金的大力扶持下，我国电动汽车市场虽刚刚起步，电动汽车基础设施--充（换）电站的建设却已如火如荼。电力、石油石化等财力雄厚的大型企业积极建设充（换）电站以谋求占领市场。充（换）电站运营商凭借电力、土地、资金等资源优势积极尝试开拓市场，却因电动汽车资质的限制而处于被动地位。

Thanks to generous state policy and funding support, even though China's electric car market is only in its infancy, construction of its associated infrastructure, especially the battery recharge and change stations, is already taking place in earnest. Financially richly-endowed firms in the electric power, oil and chemical industries, among others, have all tried to stake out a share of the market by building battery recharge and replacement stations. In their efforts to expand the market, station operators have relied on the resource advantages relating to electric power, land and finances. However, they are still subjected to restrictions imposed upon them by virtue of their lack of the certificate to make cars.

根据我国汽车资质政策，最终能够生产出可以市场化运行的电动汽车厂家屈指可数，其余大部分汽车企业和外围企业根本无法涉足。整车厂和充（换）电运营商的关联在于动力电池。在政府没有出台充电站用更换型动力电池的标准规范之前，具有电动汽车资质的整车厂有权决定动力电池的种类和规格，充（换）电站运营商必须以整车厂的电池为准进行配置。因此，充（换）电站运营商想方设法争取更多的话语权来摆脱从属地位。充电站运营商向下联合电池厂，向上不断圈地建设充电站，甚至通过购买汽车让使其成为自身电池产品的用户。目前充电站运营商积极争取政府支持并与公交集团合作，从电动公交车运营开始，自上而下对整车厂施压，从而提高对动力电池的影响力。

Under China's state policies regarding automobile manufacture credentials, only cars made by a very small number of electric car makers are deemed mass market-ready. Most

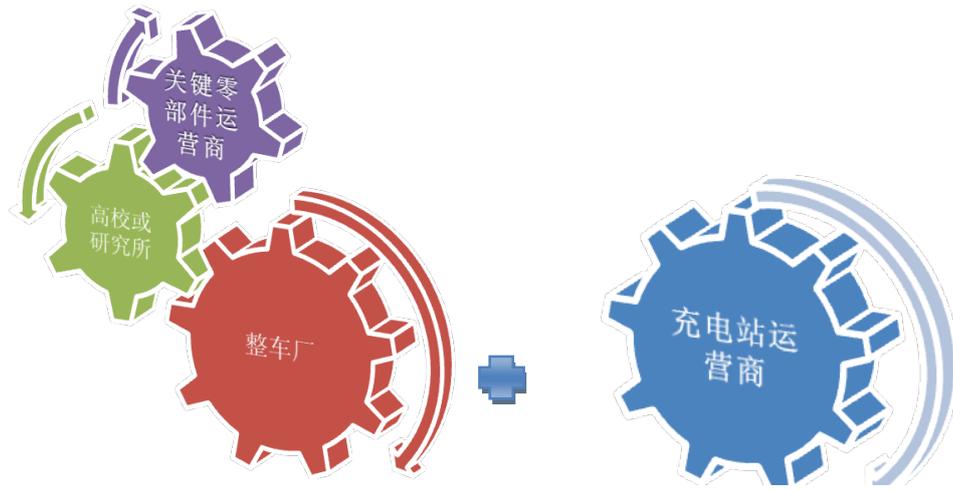
car-makers and foreign companies are unable to enter the fray. The connection between assembly plants and battery recharge and replacement stations lies in the fuel cell. Before the government sets a universal standard on the types of fuel cell to be used by these stations, the assembly plants have the right to decide the types and the model of fuel cells to be needed, and the battery recharge and replacement stations must comply with the assembly plants' fuel cell requirements. Therefore, battery recharge and replacements station operators have been thinking of ways to have a greater say in the matter and to end their subordination to assembly plants. To that end, operators of battery recharge stations have reached out downward to form alliance with battery makers, and upward to secure land for building recharge stations, and have even gone so far as to purchase cars themselves so as to become consumers of their own batteries. Currently, battery recharge station operators are working tirelessly to gain the support of the government and in cooperation, starting at the operational level, with the public transportation system. The purpose is to apply top-down pressure upon assembly plants, thereby increasing the influence of battery stations on the fuel cell.

除此之外，是否还有其他途径来获取更多话语权呢？我们认为，在现有资质政策不变的情况下，没有资质的市场主体，包括充（换）电运营商、电池运营商等都可以与掌握电动汽车整车关键技术的高校或研究机构合作，通过技术引进来提高市场竞争力，改变当前的被动局面。

Are there still more ways to secure a louder voice in the matter? We believe that under existing policies regarding automobile manufacture credentials, market players such as recharge and replacement station operators and battery manufacturers can, despite having no credential to make automobiles, work in conjunction with entities, including universities and research organizations, with access to electric car assembling technologies. In doing so, battery station operators can enhance their competitive edge, and shift the market landscape in their favor.

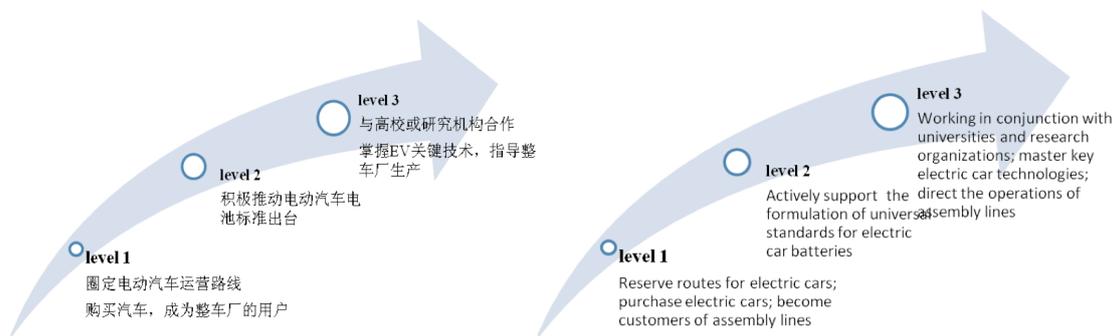
除了政府之外，最能够掌握电动汽车发展方向话语权的是掌握了电动汽车整车关键技术少数高校或研究所。在政府的推动下，整车厂与拥有电动汽车整车技术的高校（研究所）进行合作，高校和研究所带着他们的关键零部件商一起配合整车厂完成了电动汽车的设计制造，之后运营商再根据所生产的电动汽车进行充（换）电站的建设，这就是当前电动汽车产业化的一整条发展路子。

Besides the government, a few universities or research institutions with direct access to technologies key to electric car making form the second most powerful force determining the direction in which the development of electric cars would take.



充（换）电站运营商要想在电动汽车产业中获得更高的地位取得更高的话语权，要么通过（与掌握关键技术的学校研究所）合作或者自己进行跨行业发展，掌握电动汽车整车关键技术的最前沿；要么就只能依靠国家强制制定电池标准，积极推动电动汽车电池标准（电池技术指标、电池箱尺寸规格等）的出台，电池（电池箱）标准化之后，统一电池的规格型号之后，相当于整车厂放弃了部分对电池的选择权；再或者就只能依靠政府的扶持指定。

If operators of battery recharge and replacement stations wish to have a greater say in the electric car market and to leave behind their subordinate position, it is necessary that they work through cooperation (with universities and research organizations with knowledge of key technological aspects to electric car assembly) or through reaching out to other sectors of their own accord and to gain direct access to cutting-edge technologies. Otherwise, they would have to wait for uniform standard for batteries (including technical requirements for both the batteries and the battery holder) to be set by the government, and then for the government to actively promote their compliance. Thereafter, assembly plants will of course have lost a measure of freedom in matters relating to batteries.



充电运营商发展三条路

从长远角度看，汽车资质制度的改革是可以期待的，想要进入电动汽车市场而没有资质的各方力量可以呼吁汽车资质的改革。但目前，在国家没有关于电池统一标准，又无法进行跨行业发展的情况下，充（换）电站运营商只有与掌握电

动汽车关键技术的单位（高校或研究所）合作，才可能在电动汽车产业化的发展中站稳脚跟。

In the long-term, we can expect government policies regarding automobile manufacture credentials to change, and this is change that bodies that do not yet possess the necessary credentials to enter the market but wish to do so actively call for. Currently, however, since universal standards for batteries do not yet exist, nor do the conditions for cross-sector industrial development, battery recharge and replacement station operators have no other option than to work with universities and research organizations that possess knowledge of key electric car technologies if they wish to maintain a foothold in the market maturation process of the electric car industry.

说明：

本文仅为完整报告的部分内容，未经授权请勿引用，如需完整报告请联系
changcethinktank@gmail.com