

# 驶入“快车道” MOVING INTO THE FAST LANE

去年11月,吉利博瑞GC9被宣布为“2016年中国年度汽车奖”的获得者。这不仅是中国自主研发汽车有史以来第一次赢得该奖项,更是第一个参与该竞争的中国品牌汽车。面对来自139种汽车的竞争,吉利博瑞GC9在三轮道路测试后成功击败排名第二的戴姆勒迈巴赫s级以及排名第三的捷豹XE,获得冠军。更有汽车媒体报道称“在汽车的设计,工程细节和汽车驾驶性能方面,吉利GC9都给评委们留下了深刻的印象。”

*In November last year, the Geely GC9 Borui saloon was announced as the winner of the 2016 China Car of the Year. Not only was it the first Chinese car to ever win, it was the first Chinese branded vehicle ever to have been entered. Facing competition from 139 cars, it beat out the second placed Daimler Maybach S-class and third placed Jaguar XE to clinch the title after three rounds of road tests. "The Geely GC9 left a strong impression on the judges, in terms of design, engineering and handling," said a media panellist.*

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**B**ack in the 1980s the Chinese government set out to create a modern auto industry. Recognising how far the existing producers were behind the market leaders, they invited foreign brands to set up joint ventures (JV) with these state owned enterprises (SOEs), the idea being that the SOEs would receive technology and be able to eventually produce their own competitive cars. Unfortunately, things didn't quite go as planned. China did become the largest car producer, but still the majority are made by the JVs. With the exception of Chang'an, these companies have struggled to produce vehicles that are as appealing as the JV models. The real challenge to

**早**在20世纪80年代,中国政府就开始创建现代化的汽车行业。鉴于现有生产商远远落后于市场领导者,他们邀请国外品牌和这些国有企业(SOEs)成立合资企业(JV),之所以这样做是因为国有企业能获得技术并且最终能够生产他们自己的有竞争力的汽车。不幸的是,事情并没有按计划进行。中国确实成为了最大的汽车生产国,但是其中大部分仍是由合资公司制造的。除了长安之外,这些公司都没能生产和合资企业车型一样吸引人的汽车。对合资公司而言真正的挑战来自新一代的私营企业。

从顶部起 FROM TOP  
吉利 GC9;  
Geely GC9;  
比亚迪 e6;  
BYD e6;  
长城 C30;  
Great Wall C30





◀ 创立于1995年, 2002年7月31日在香港主板发行上市, 公司总部位于中国广东深圳, 是一家拥有IT, 汽车及新能源三大产业群的高新技术民营企业。Founded in 1995, Listed on the Hongkong stock exchange on July 31<sup>st</sup>, 2002, and located in Shenzhen, Guangdong, China, the company is a highly innovative private enterprise with state of the art IT, and new energy departments.



◀ 成立于1986年, 浙江吉利控股集团有限公司(吉利汽车)是中国国内汽车行业十强中唯一一家民营轿车生产经营企业。2009年12月, 成功收购沃尔沃汽车100%的股权。Founded in 1986, Geely Automobile is one of only ten private companies in the Chinese national auto industry. In December 2009, Geely acquired 100% of Volvo.



**Great Wall**

▲ 成立于1984年, 公司总部位于河北省保定市。长城汽车是中国首家在香港H股上市的整车汽车企业、国内规模最大的皮卡SUV专业厂、跨国公司。Founded in 1984, the company headquarters is located in Baoding City, Hebei Province. The Great Wall Automobile company is China's first such enterprise to be floated on Hongkong's stock exchange. It has the largest Pickup and SUV factory and is a transnational corporation.



the JVs is being mounted by newer private companies.

A few years ago there were at least a hundred supposed car producers in China. All had grand ambitions, but they were often armed with little more than a shed and a photocopier. This has thinned considerably and there are now three companies (Geely, Great Wall, and BYD) at the forefront of China's global car ambitions.

Chinese cars used to sell on the fact that they were cheap, but now many companies are turning to the "more-for-less" strategy used to such a great effect by the Korean producers. The leading Chinese manufacturers have upped the features on their models particularly in the form of electronics, to match ones often previously only found on premium brands. This of course comes at a cost. Five years ago it was rare to find a Chinese car above RMB150,000 with most below 100,000. Today many are pushing 250,000 with some cars, such as the BYD Tang Ultimate special edition, commanding a whopping 518,800.

How do Chinese cars match up to the competition? All three leading producers have been through a copying stage in design and BYD are arguably still there – last year's Tang is heavily influenced by the Lexus RX. The GC9 is the first Geely since designer Peter Horbury went over from Volvo and shows what can be achieved. Great Wall's more recent offering suffers from being generic, but this is likely to change with the introduction in 2016 of the first cars to be designed by Pierre Leclercq, who while at BMW was responsible for the X5 and X6.

The interiors of Chinese cars used to be terrible with poor quality materials, but in cars such as the Tang, GC9 and Great Wall's Haval H9, these have been replaced by soft plastics and plush leather. "Chinese car producers have problems

几年前, 中国至少有一百个所谓的汽车生产商。他们都曾有很大的野心, 但他们通常所谓的“办公室”都只拥有一个小屋和一台复印机。这些公司的数量在很大程度上已经减少了, 现在仅有三家公司(吉利, 长城和比亚迪)仍在努力带领中国汽车走向全球。

大家以前买中国汽车是因为便宜, 但现在很多公司都在转向韩国生产商以前经常用的策略——“用更低的价格买更好的汽车”。主要的中国制造商已经特别以电子设备的形式提高了他们的车型特性, 以此来匹配那些以前只在高端品牌才有的电子设备。这当然是有代价的。五年前, 找到一辆RMB150,000以上的中国汽车是很难得的, 大多数汽车的价格都低于RMB100,000。而现在很多汽车的价格将近RMB250,000, 比如比亚迪唐极速版的售价就高达RMB518,800。

中国汽车如何跟上竞争的步伐? 三个主要的生产商已经在设计方面经历过模仿

阶段, 可以说比亚迪还处在这个阶段——去年的比亚迪唐深受雷克萨斯RX的影响。GC9是设计师彼得·霍布里从沃尔沃转到吉利以后的第一个设计, 并且给大家展示了什么是可以实现的。长城最近出产的汽车都比较普通, 但是这种现状很有可能会被2016年介绍的第一批由Pierre Leclercq设计的汽车而改变, Pierre Leclercq曾在宝马公司负责宝马X5和X6。

中国汽车的内部以前都很糟糕, 用料极其差。不过近期的比亚迪唐、GC9和长城哈弗H9这样的汽车内部用的都是软塑料和豪华的皮革。“中国汽车生产商的集成能力有问题。国际汽车制造商可以控制大型供应商给他们的汽车提供最好的技术。”独立汽车工业分析顾问David Zhang说道。然而, 似乎主要的汽车品牌也在越来越好。

多年来, 汽车行业核心技术上有了持续改进, 最近有很多创变者企图从根本上改变整个行业。首先, 整个势头似乎转向了新能源汽车, 然后又出现了自动驾驶汽车技术,

从顶部起 FROM TOP

吉利 SC7 Geely SC7; 吉利博悦 Geely Bo Yue; 吉利熊猫 Geely Lc CROSS







with integration ability. International car-makers can control big suppliers to provide the best technology for their cars," says David Zhang, an independent automotive industry analyst consultant. It seems however that the leading brands are getting there.

For many years the car industry had incremental improvement in core technology from one model generation to the next, but more recently there have been many disruptors that stand to radically change the whole industry. Firstly, there seems to be momentum gaining in the shift to new energy vehicles. Then there is the emergence of technology for self-driving cars, but coupled with this, there are questions about the very notion of car ownership. Currently it is difficult to assess whether these put Chinese producers at an advantage or potential disadvantage.

A modern turbo charged petrol engine should produce 100hp for each litre of displacement. All three leading manufacturers have managed this with at least one engine. Great Wall's 2.0T as fitted to the H9 produces a highly respectable 214hp. Also they have all managed to either produce or buy in the latest dual clutch gearbox technology. However, they lag in terms of fuel economy and resultant emissions.

BYD is the current Chinese market leader in electric and plug-in hybrids. The Tang uses less than two litres of fuel per 100km while giving acceleration time to 100km/h in under five seconds. Geely announced at the end of last year its Blue Geely Initiative which sets out to have 90% of sales made up of new energy vehicles by 2020. At the Guangzhou Auto Show in November, the company launched its first mainstream electric car, the Emgrand EV, which has a range of up to



330km. Great Wall has yet to publicly commit to any new energy strategy.

"The 2015 Shanghai Auto Show had an incredibly large number of connected car concepts and production models on display, particularly by Chinese automakers," says Celina Li, automotive technology senior analyst for IHS. This is likely to be the next major area for a push by Chinese producers. Baidu is already in the market with CarLife (similar to Android Auto and Apple CarPlay) and recently launched the more advanced MyCar. This may be an area where Chinese brands manage to outmanoeuvre the more established competition. ▣



从左侧起 FROM LEFT  
吉利SUV;  
Geely SUV;  
吉利SUV细节;  
Details of Geely SUV;  
吉利自主研发引擎;  
Geely Self-developed engine;  
长城哈弗SUV内部;  
Details of Great Wall Haval SUV;  
BYD 内部细节;  
Details of BYD car;  
长城哈弗SUV内部

但是与此同时也产生了一些汽车所有权的概念问题。目前,很难评估这到底是让中国生产商处于优势还是潜在的劣势。

现代涡轮增压汽油发动机每升位移应该产生100马力。三个主要生产商都已经至少在一个引擎上取得成功。安装到长城H9的2.0T可以产生让人极其惊讶的214马力。还有他们在最新的双离合器变速箱技术方面都有成功的生产或购买。然而,他们在燃油经济性和合成的排放方面还比较落后。

比亚迪是现在电气和插电混合动力汽车的中国市场领导者。比亚迪唐每100km只需少于2升的燃料,同时还可以在5s内加速到100km/h。吉利在去年年底宣布了蓝色吉利行动,计划到2020年实现新能源汽车销量占吉利整体销量90%。在11月份的广州车展,吉利汽车公司推出了第一款电动汽车帝豪EV,续航里程可达330km。目前,长城还未公开承诺任何新能源战略。

"2015上海车展展出了令人难以置信



的大量联网汽车概念车和生产车型,尤其是中国汽车制造商," IHS汽车技术高级分析师Celina Li说道。这可能是中国生产商推动的下一个主要区域。百度CarLife(类似于安卓汽车系统和苹果CarPlay)已经投入市场,并且最近推出了更高级的MyCar。中国品牌可能会在这个领域战胜其他更成熟的竞争者。 ▣