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## Mobility of the future: China speeds ahead

**Munich, October 2018: China is fast becoming the driver of global innovation in the automotive industry. In the race to claim a slice of the future market for mobility services, the Middle Kingdom has taken the lead. One in every two electric cars sold in the first half of 2018 went to a customer in China. The country has also seen a massive expansion of charging infrastructure in the past 12 months and has opened new test roads for autonomous vehicles. Chinese consumers are supportive of technological advances and are making good use of mobility offerings like car sharing and ride hailing ([Download study here](#)).**

"No other country is as advanced and as open to new technologies and mobility services as China. Most of the traditional automotive nations are stagnating on this front, or are making slow progress at most," said Wolfgang Bernhart, Partner at Roland Berger. "China is not only the world's biggest market for cars and an important manufacturing base – it has, in fact, long since moved on from being the workbench of the industry to being the R&D lab."

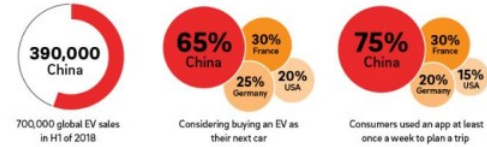
China's leading role can be seen most clearly in the scale of its expansion of the infrastructure needed for battery electric vehicles. Despite having an enormous road network within its borders, in the past 12 months, the country has managed to double the amount of capacity it offers – from 2.5 charging stations per 100 km of roadway to 5.7 (Germany 4.5, France 2.3, USA 0.3 stations per 100 km of roadway). This is money well spent, given that Chinese consumers believe in e-mobility more than many others: 65 percent of Chinese survey respondents can imagine buying an electric car as their next vehicle. As such, they are much more open to innovation than consumers in Western Europe, where the level of interest is stagnating at a mere 30 percent.

# CHINA IN THE DRIVER'S SEAT

Charging ahead in EVs and mobility services

## CONSUMERS:

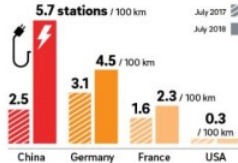
### Booming interest in electric vehicles



## INFRASTRUCTURE:

### The public charging network is growing fast

China doubled its charging infrastructure over the past year:



Source Roland Berger

## REGULATION:

### Beijing paves the way for more EVs

- Crackdown on combustion engines:** More Chinese cities are discouraging combustion engine ownership while actively promoting use of electric vehicles
- New rules for foreign OEMs:** Beijing has ended restrictions on foreign ownership of EV manufacturers in an effort to promote development
- Open to trials of self-driving cars:** Daimler and BMW recently gained approval to test autonomous vehicles in Beijing and Shanghai

## INDUSTRY:

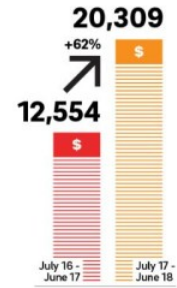
### Car producers jump into new Chinese mobility services

- OEMs invest heavily in mobility platforms, eg Geely runs CaoCao Zhuanche; FAW, Dongfeng and Changan launch T3 Mobile Travel Services
- Foreign OEMs join forces with local tech giants in autonomous driving ventures, eg BMW with Baidu, Audi with Huawei
- Ride-sharing giant Didi partners up with more than 30 car makers and plans to roll out its own car model

## FUNDING:

### Venture capital boosts investments in mobility services

Top 10 Invests (2017/18)	[USD m]
Didi Chuxing (Ride Hailing)	China 4,000
Grab (Ride Hailing)	Singapore 3,000
Go-Jek (Ride sharing)	Indonesia 2,735
Lyft (Ride Hailing)	USA 2,030
HelloBike (Smart-sharing bikes)	China 1,524
Ofo (Bicycle rental)	China 1,286
Uber (Ride Hailing)	USA 1,250
Ola (Ride Hailing)	India 1,100
Bird (Electric Vehicle Sharing)	USA 451
CaoCao (Ride Hailing)	China 381



\*The figures in the graphic are based on the results of the Automotive Disruption Radar, a semi-annual survey conducted in 13 countries: Belgium, China, France, Germany, India, Italy, Japan, Netherlands, Singapore, South Korea, Sweden, UK, USA

Roland Berger

## Policymakers exert a massive influence over developments

Innovative forms of mobility are the top of the political agenda in China. The country's standardized guidelines and fundamental openness to self-driving vehicles mean it is becoming a global test bed for self-driving cars and an important potential market for large foreign manufacturers: German OEMs recently gained permits to trial autonomous vehicles on the streets of Beijing and Shanghai. The government is simultaneously driving forward with vehicle-2-everything initiatives to connect vehicles not only to other vehicles but also to mobile devices and even electronic road signs. Beijing clearly wants to be a leader in the technology to compete with the key US tech providers.

But the momentum stems not only from political quarters. Chinese industry, too – OEMs and tech firms alike – have ramped up their activity in recent months, entering into new or expanding on existing cooperation agreements.

## No single brand dominates the global market

Although tech giants and OEMs are working hard on disruptive mobility concepts, the Roland Berger experts do not yet see anyone mobility brand dominating the global market: "Despite a very high level of awareness around issues like self-driving vehicles, connectivity and e-mobility among the international public at large, no one company has yet emerged as the global

frontrunner," said Wolfgang Bernhart in summary.

The latest rankings are led by Uber (USA), albeit known by "just" 46 percent of those polled, followed by blablacar (France) at 20 percent and Daimler's car2go at 9 percent. "So there is still everything to play for in the race for supremacy in innovative mobility services," said Bernhart.

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*Roland Berger, founded in 1967, is the only leading global consultancy of German heritage and European origin. With 2,400 employees working from 35 countries, we have successful operations in all major international markets. Our 52 offices are located in the key global business hubs. The consultancy is an independent partnership owned exclusively by 230 Partners.*

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