



China Transport Policy Briefing

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On Behalf of:



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Abbreviations

CAFC	Corporate Average Fuel Consumption	乘用车企业平均燃料消耗
CDEVAPA	Chengdu Electric Vehicles Application and Promotion Association	成都市新能源汽车产业推广应用促进会
GACC	General Administration of Customs of China	海关总署
IV	Intelligent Vehicle	智能汽车
IOT	Internet of Things	物联网
MCEIT	Municipal Commission of Economic and Information Technology	市经济和信息化委员会
MEE	Ministry of Ecology and Environment	生态环境部
MIIT	Ministry of Industry and Information Technology	工业和信息化部
MNR	Ministry of Natural Resources	自然资源部
MOF	Ministry of Finance	财政部
MOFCOM	Ministry of Commerce	商务部
MOHURD	Ministry of Housing and Urban and Rural Development	住房和城乡建设部
MOT	Ministry of Transport	交通运输部
NDRC	National Development and Reform Commission	国家发展和改革委员会

NEV	New Energy Vehicle	电动汽车
SAMR	State Administration for Market Regulation	国家市场监督管理总局
SAT	State Administration of Taxation	国家税务总局

1. State Council's Three-Year Plan on the Restructuring of the Transport Sector focuses on shift from road to rail and waterway (09/10/2018)

推进运输结构调整三年行动计划（2018—2020 年）

http://english.gov.cn/policies/latest_releases/2018/10/09/content_281476337888136.htm?from=groupmessage&isappinstalled=0

The State Council issued the “Three-Year Action Plan on Transportation Restructuring” to efficiently tackle pollution caused by the transport sector, raise the efficiency of transportation and lower logistics costs. The Action Plan is part of the supply-side structural reform and aims at improving the overall transportation network by shifting part of the transport volume from road to rail and waterway.

According to the targets set out in the Action Plan, China aims at a 30% increase in railway transportation volume by 2020 (compared to 2017), or 1.1 trillion tons, and an increase in waterway transportation volume of 7.5% and 500 trillion tons by 2020. The road transportation volume for bulk cargo is set to see a reduction of 440 billion tons, whereas the multi-modal transportation volume will see a 20% annual increase. By 2020, over half of new and updated vehicles in urban areas, shall be new energy vehicles or clean energy vehicles, with a target of 80% in key areas. Moreover, the organization of the railway transportation system will be further optimized, prioritizing the supply of coal, hard coke, ores, and grains compounded with flexible and better coordinated train arrangements. By 2020, key ports, both coastal and inland, shall be covered with a distribution railway network.

The Action Plan emphasizes implementation in the economic and industrial powerhouses of China: Beijing, Tianjin, Inner Mongolia, Hebei, and Shanxi in Northern China, Shanghai, Shandong, Henan, Jiangsu, Zhejiang, and Anhui in the East, as well as Liaoning in the Northeast and Shaanxi in the Northwest.

2. State Administration for Market Regulation (SAMR) announces standards for the design of urban roads (10/10/2018)

2018 年第 13 号中国国家标准公告

<http://std.sacinfo.org.cn/gnoc/queryInfo?id=9CD005D3AD4F174288779A473DAD73BB>

Out of the over 20 new national standards released by SAMR, the “Guidelines on the Design of Traffic Operation of Urban Roads” is the most relevant standard for the transport sector. They will be applied as of **1 May 2019** and aim at helping China to conductively solve urban challenges such as traffic congestion and parking challenges. They are expected to improve the road traffic structure, ensure road traffic safety and improve the road traffic operation efficiency in China in the future. Details of how this shall be ensured will be announced at a later date.

3. State Council asks ministries to come up with policies to promote new energy vehicles (NEVs), intelligent vehicles (IVs), and recycling of cars (11/10/2018)

《完善促进消费机制实施方案（2018—2020）》

http://www.gov.cn/zhengce/content/2018-10/11/content_5329516.htm?trs=1

The State Council released the “Implementation Plan on Improving and Promoting the Consumption System”, which proposes a series of initiatives to stimulate and upgrade the Chinese economy.

In the automotive sector, the State Council charges the Ministry of Commerce (MOFCOM), Ministry of Industry and Information Technology (MIIT), National Development and Reform Commission (NDRC), Ministry of Transport (MOT), Ministry of Finance (MOF), State Administration of Taxation (SAT), Ministry of Natural Resources (MNR), Ministry of Housing and Urban and Rural Development (MOHURD), Ministry of Ecology and Environment (MEE) and General Administration of Customs (GACC) with issuing policies and administrative measures to promote NEVs, IVs, the import of foreign cars, trade of second-hand cars as well as recycling of cars.

The responsible authorities shall continue to promote the development of NEVs through favorable procurement policies, further improve the NEV credit management system, implement the Corporate Average Fuel Consumption(CAFC) and NEV credit standards, as well as research the establishment of a mechanism for trading credits. Electric vehicle charging infrastructure standards shall be improved and related services shall become smart through the application of Internet of Things (IoT) solutions. The authorities shall research and define policies and measures for the development of innovations in the area of IVs, the recycling of cars and the promotion of a shared car-economy. The government shall also reduce the restrictions on parallel imports of cars and remove barriers to the trade of second-

hand cars. Besides that, specialized bonds and further financial support shall be offered for the construction of parking infrastructure.

4. Beijing issues new regulations for the administration of light electric vehicles and their place in traffic safety law (10/10/2018)

北京市非机动车管理条例

<http://fwuw.bjrd.gov.cn/rdzw/information/exchange/Laws.do?method=showInfoForWeb&id=2018614>

The Standing Committee of the Beijing Municipal People's Congress released the new "Regulations on the Administration of Light Electric Vehicles", **valid from 1 November 2018**. This affects all non-commercial electric bikes, electric scooters, electric hoverboards as well as electric three-wheelers and light electric four-wheelers. This group is further split up into electric bicycles (defined as electric vehicles with a maximum speed of less than 20km/h, a maximum weight of less than 40kg and with two bicycle pedals) and all others.

All light electric vehicles in Beijing need to be registered with the Beijing Traffic Management Bureau **before 30 April 2019**, but only electric bicycles as defined above may receive permanent license plates which allow for unrestricted access to Beijing's roads. All others may access Beijing's roads for a three-year interim period with a temporary license plate but will not be allowed on public streets after that. All electric self-balanced scooters and hoverboards will strictly be prohibited on public streets **from 1 November 2018 onwards**. Any violation will be fined, vehicles or license plates may be confiscated by the police.

The official registration process will be available from 1 November 2018 onwards. The recently published catalogue of electric bicycles lists the models officially accepted for registration. Furthermore, the "Modification of the Implementation of the Traffic Safety Law of the People's Republic of China in Beijing" requires all light electric vehicles which do not fit into the definition of electric bicycles to be treated as motor vehicles in case of an accident or breach of regulations, **valid from 1 November 2018**.

5. Tianjin aims to promote the development of NEVs, lithium-ion batteries, hydrogen and fuel cells (30/10/2018)

天津市新能源产业发展三年行动计划（2018—2020年）

http://gk.tj.gov.cn/gkml/000125022/201810/t20181030_80623.shtml

Aiming to promote the development of new energy industries, the Tianjin Municipal Government released the "Three Year Action Plan for the Development of New Energy Industries in Tianjin (2018-

2020)", in line with the State Council's Made in China 2025 and Strategic Action Plan on Energy Development.

In the transport sector, the Plan promotes the development of NEVs, lithium-ion batteries and hydrogen energy and fuel cells. By actively encouraging research and development in those core technology areas as well as improving corresponding industry chains, Tianjin's government expects to foster itself as a base for new energy industries. The plan also announces several important projects, such as the construction of a hydrogen fuel cell vehicles industry park, a lithium-ion battery industry base as well as an NEV industry base in Tianjin.

6. Chengdu asks distributors to report NEV sales (10/10/2018)

关于报送成都市新能源汽车销售情况的通知

http://www.cdgy.gov.cn/cdsjxw/c132806/2018-10/10/content_90df9bba081f434cac3e25b054f173c5.shtml

The Chengdu Municipal Commission of Economic and Information Technology (Chengdu MCEIT) in the "Notice on the Submission of NEV Sales Reports in Chengdu" announced that from October 2018 on, distributors need to report all NEV sales in Chengdu to the Chengdu Electric Vehicles Application and Promotion Association (CDEVAPA), an association in charge of promoting NEVs in Chengdu, before the 12th calendar day of each following month. The sales of 2017 and Q1 to Q3 2018 need to be reported to CDEVAPA before 12 October 2018, otherwise subsidies may not be provided.

7. Hainan Pilot Free Trade Zone will remove restrictions on foreign investments in NEV manufacturing (16/10/2018)

国务院关于印发中国（海南）自由贸易试验区总体方案的通知

http://www.gov.cn/zhengce/content/2018-10/16/content_5331180.htm

The State Council approved a plan for the southern Province of Hainan to establish an island-wide Free Trade Zone (FTZ) and to increase the province's openness and integration into economic globalisation. According to the Plan, Hainan will be developed into a pilot zone for deepened economic reforms and shall become a centre of international tourism and consumption. The FTZ will be the first of China's 11 FTZs to cover an entire province.

The Hainan FTZ will adjust several rules regarding the protection of national investments, including the removal of restrictions on foreign investments in NEV manufacturing and share-ratio restrictions for foreign companies in the private aircraft sector (designing, manufacturing and maintenance).

8. MIIT publishes information on China's 1538 Traction Battery Recycling Stations (30/10/2018)

新能源汽车动力蓄电池回收服务网点信息正式公布

<http://www.miit.gov.cn/newweb/n1146290/n1146402/n1146440/c6411847/content.html>

In line with the Interim Administration Measures for Traction Battery Recycling and Interim Administration Measures for the Traceability of Traction Battery Recycling, MIIT published a list of recycling stations for traction batteries. Currently, there are a total of 1538 stations nationwide. The Recycling Station List will be updated quarterly.

9. Beijing White Paper on Intelligent and Connected Vehicles (ICVs) forecasts ICV industry worth 13 billion EUR by 2022 (22/10/2018)

《北京市智能网联汽车产业白皮书（2018年）》发布

<http://jxw.beijing.gov.cn/jxdt/xydt/286900.htm>

At the closing ceremony of the 2018 World ICV Conference, Director Wang Gang of Beijing MBEIT announced the release of the “Beijing White Paper on ICVs (2018)”. The White Paper elaborates on the definition and scope of ICVs, and forecasts development trends for the intelligent and connected automobile industry until 2022.

In the near future, Beijing shall establish a world-class system of ICV technologies which can satisfy the requirements of Level 4 automation, an efficient and secure demonstration zone of new intelligent mobility of more than 500 square kilometers, and an ICV manufacturing and user service system. Beijing's ICV-related industries are to reach a scope of 100 billion RMB (around 13 billion EUR). In the long-term, the White Paper envisions Beijing to be home to a top of the world cluster of ICV industries, with a vibrant and innovative ecosystem for automated driving complemented by a “secure, efficient, green and civilized ICV society”.

Supplement Policies from September 2018:

10. Yunnan Province aims to have 50,000 NEV by the end of 2018 (11/09/2018)

云南省人民政府办公厅关于印发云南省加快新能源汽车推广应用工作方案的通知

http://www.yn.gov.cn/yn_zwlanmu/qy/wj/yzbf/201809/t20180911_33896.html

The Yunnan Provincial Government announced the “Working Plan for Accelerating the Promotion and application of NEVs in Yunnan” in late September 2018.

According to this plan, by the end of 2018, Yunnan should have 50,000 operating NEVs, which represents 1% of the total vehicle volume. Furthermore, the number of public charging piles and centralized charging stations in the Province should reach 15,000 and 140 respectively until the end of 2018, as shown in the table below.

Focus areas and cities	Target number of NEVs	Target number of public charging piles	Target number of centralized charging stations
City of Kunming	37,000	11,000	50
City of Qujing	5,000	1,250	20
City of Yuxi	3,000	900	15
Chuxiong Yi Autonomous Prefecture	2,000	650	10
Honghe Hani & Yi Autonomous Prefectures	3,000	900	15
Provincial highways	n.n	300	30
Total	50,000	15,000	140

11. Shandong Province's plan for new energy industries focuses on NEVs in the transport sector (21/09/2018)

山东省新能源产业发展规划（2018-2028 年）

http://www.shandong.gov.cn/art/2018/9/21/art_2267_28610.html

The Shandong Provincial Government announced its “Ten-Year Plan for the Development of New Energy Industries in Shandong Province (2018-2028)”, which sets out a general strategy for new energy industries in Shandong and aims at increasing the competitiveness of the province by shifting its growth engines towards sustainable industries.

In the transport sector, electric vehicles, plug-in hybrids and hydrogen fuel cell vehicles are expected be the most important pillars of this development. By 2022, a NEV industrial cluster shall be

established, which is to include the cities Ji'nan, Qingdao, Zibo, Yantai, Weifang and Liaocheng. The total amount of NEVs in use shall reach about 500,000 units and the total sales value of the NEV industry should reach 250 billion RMB (31.8 billion EUR). Until 2028, this number is expected to reach 400 billion RMB (50.9 billion EUR). The number of charging stations in the province shall exceed 100,000. In the overall hydrogen energy industry, the total value of sales in the province shall reach 50 billion RMB (6.4 billion EUR) until 2028. From 2019 onwards, the provincial party, and government and public institutions at all levels are required to purchase NEVs instead of conventionally fuelled vehicles. This especially applies to government courier vehicles, law and duty enforcement patrol vehicles, and commuting vehicles.

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