CEIBS Annual China Automotive Industry Forum

Summary Report
(2003 – 2018)
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The China Europe International Business School (CEIBS) is a non-profit joint venture established in 1994 under an agreement between the Chinese government and the European Commission. In the 24 years since its launch, the China Europe International Business School (CEIBS) has solidified its reputation as the leading international business school in Asia. CEIBS is the first business school on the Chinese mainland to have been accredited by both EQUIS and AACSB and the only business school in Asia to have simultaneously made it to the Financial Times’ top 10 list of MBA and EMBA programmes.

The European Automobile Manufacturers Association (ACEA), founded in 1991, represents the interests of the fifteen European car, truck and bus manufacturers at EU level. Its membership consists of the major international automobile companies, working together in an active association to ensure effective communication and negotiation with legislative, commercial, technical, consumer, environmental and other interests.

China Association of Automobile Manufacturers (CAAM) is a self-governed and non-profit social organization founded on an equal and voluntary basis in 1987 by enterprises, institutions and organizations engaged in the production and operations of automobiles and auto parts within the boundaries of the People's Republic of China. With nearly 2000 member units, it is a permanent member and Vice President of the International Organization of Motor Vehicle Manufacturers (OICA) and has established a close relationship with international auto-industry organizations and auto related organizations in many countries and regions across the globe.
2018: Future Mobility: Are We Ready To Move Into A New Eco Mobility System?

One of the most important questions the automotive industry is facing today is whether it will continue to play a leadership role in shaping the mobility of the future - this irrespective of being in China, Europe, United States, Japan, Korea or elsewhere. How people and goods are going to move in the future will be increasingly influenced by a wide range of external factors such as: the pressure to respect increasingly more restrictive environmental requirements, expectations to introduce on the market increasingly connected and highly automated vehicles and the arrival of new competitors, often coming from outside the automotive sector. What will be the role of the other non-traditional players in shaping the mobility of the future - and is the industry really in control of its own destiny. Equally important will be the role of the regulator in providing a framework which may assist in shaping the future eco mobility system. Are we finally going to see the regulators taking a globally consistent approach in creating a legislative framework that may help to drive the expansion of innovative mobility solutions? The future mobility will be based on a multiplicity of new technologies and solutions. The real question is how the industry is going to adjust to this new situation in which it will not necessarily play a leading role. Will the new generation of young people still favor owning their own car- or are we witnessing a shift towards shared mobility systems and new forms of transport including the a new public transport system? What are the expectations of young people today on the way they will move tomorrow. Will cars going to be sold in the same or similar way as today. And what will be the role of the dealers in the future? Urban mobility will be fully integrated into smart cities, which will be influencing the way people and goods are going to move in the urban areas. Are we going to see different solutions for urban and rural areas? Already today we see the introduction of new modern forms of transport - Hyperloop, Aeromobiles and drones are being tested and developed everywhere. What will be the new technologies that will allow us to transport goods even in more efficient ways - and what will be the solution for the last mile? Are we finally moving to a situation of real co-modality, where the different modes will transport goods - and people - in a seamless way? Both locally and globally. Over 3.000 persons die on the roads across the globe every day. Will digitalization translated in connected and automated cars help to reduce this unacceptable number of fatalities as well as the accidents on the road? What will be the role of the regulator and international organisations such as OICA and UNECE in this fight for safer roads? Smart cities across the world are introducing technologies that should limit or almost eliminate accidents in urban areas - but what about the rural ones? And are we going to see a real integrated approach to road safety (vehicle, driver, infrastructure and enforcement) becoming finally a reality?The automotive industry is facing major challenges as probably never before - is it going to be able to cope with it and what will it take in order to meet the expectations - and pressure - from society?
The policy of the new US administration signals to significantly change the attitude of the United States to international trade and globalization. How will it affect the automotive production in car producing countries and regions? And of course the departure of the United Kingdom from the EU, so called Brexit, may play an important role in this new international trade and business environment. The pressure to invest in the development of connected and automatically driven cars will ask for important human, financial and other resources- but is the electrical car the future powertrain? What will be or better should be the role of public authorities and what should be the role of the industry? Will they find a common language to make sure that not only the clean, safe, connected and automated cars will arrive in the expected span of time, but that also the needed infrastructure and clean energy is ready? An important question is remaining without an answer: will the young people of today still like to own and use motor vehicles? Car sharing, use of public transport and totally new mobility means may be taking over from the traditional cars - or at least from the way we will use them. And what role will play the new, today maybe utopian dreams about completely new means of transportation such as Hyperloop? These new ways we are supposed to move in the future are being developed in the speed of light and beginning to be taken seriously. Is China going to be the cradle of them? Or will the old world still dominate?

The 15th CEIBS Automotive Forum will deal with the important questions outlined above: the future of free trade and globalization, in particular in view of the position of the new US administration, the fast arrival of smart solutions to our cities, automated driving and solution to global environmental problems that are expected from the automotive industry. It will include a dialogue with young people "how do I want to move tomorrow"?
After years of gestation it seems that concept of ‘automated driving’ is finally gaining traction, across the globe and also in China. Automated driving or nearly automated driving could well become a reality in early 2020 – a little over 5 years away. Connectivity and electric vehicles will be a key part of this development, and new business models such as shared driving and automatic taxi fleets will develop. This in turn will lead to a major reshaping of the industry, both in terms of the players in the sector and in terms of policy and regulation. At this year’s forum, we will address - from the perspectives of government officials, industry leaders and renowned academics - how connectivity and automated driving will affect China’s auto industry, how regulation and policy will have to adapt, which changes this might provoke in the industry structure, and to what degree China could be a part and a driver of the changes which are occurring at global level.
Forum Theme

**China Automotive Industry Forum**

- **2015:** *Smart Cities and the Auto Industry: Connectivity, Mobility & Smart Cities*
- **2014:** *Smart Cities and the Auto Industry: China and the World*
- **2013:** *The Chinese Auto Sector: Connectivity and Mobility in Global Perspective*
- **2012:** *The Chinese Automotive Industry: Feasible and Sustainable Development? Shaping the Future of the Auto Industry: Consolidation, Technology and the Role of Government*
- **2011:** *The Future of the Auto Industry: Technology Rationalization and Globalization*
- **2010:** *Auto & Society: Adaptation & Development*
- **2009:** *Beyond the Crisis: Consolidation & Sustainability*
- **2008:** *Sustainable Development of the Auto Industry, Globally and in China*
- **2007:** *China’s Auto Industry: from Joint Ventures to Global Alliances*
- **2006:** *The Chinese Automotive Industry: Feasible and Sustainable Development?*
- **2005:** *China’s Automotive Industry: Who will be the winners?*
- **2004:** *China’s Automotive Industry: Building Competitive Advantage*
- **2003:** *China’s New Automotive Industry Policy: Challenges & Opportunities*
Invited Speakers

China Automotive Industry Forum

Industry Leaders

- **Dieter Zetsche**
  Chairman of the Board of Management of Daimler AG; Head of Mercedes-Benz Cars

- **Carlos Ghosn**
  Chairman and CEO of Renault-Nissan Alliance

- **Carl Peter Forster**
  Group CEO and Managing Director of the Tata Motors Group

- **Steve S. Yang**
  President and CEO of Hyundai Motor Company

- **Hakan Samuelson**
  President and CEO of Volvo Car Group

- **Jean-Martin Folz**
  (Then) CEO of PSA Peugeot-Citroën

- **Paolo Monferino**
  CEO of Iveco S.p.A

- **Christian Streiff**
  CEO of PSA Peugeot-Citroën

- **Toshiyuki Shiga**
  COO of Nissan Motor Co., Ltd.

- **Harrie Schippers**
  President of DAF Trucks N.V

- **Matthew TSIEN**
  Executive Vice President & President of China of General Motors Company

- **Olaf Kastner**
  President & CEO, BMW China
Invited Speakers

China Automotive Industry Forum

Industry Leaders

Xu Heyi
Chairman of Beijing Automotive Industry Holding Co., Ltd.

Zhu Fushou
General Manager and Deputy Secretary of the Party Committee, Dongfeng Motor Corporation

Zhang Fangyou
Chairman of Guangzhou Automobile Industry Group Co., Ltd.

Zhang Baolin
President of Chang'an Automobile Co., Ltd.

Li Shufu
Chairman of Geely Group Co., Ltd.

Wang Xigao
Chairman of Jiangling Motors Co., Ltd.

Yin Mingshan
Chairman of Lifan Holding Co., Ltd.

Yin Tongyue
Party Secretary, Chairman and General Manager, Chery Automobile Co., Ltd.

Lu Jianhui
Vice President of Chery Automobile Co., Ltd.

Ralf Cramer
Member of the Executive Board, Continental AG President & CEO, Continental China

Claes Svedberg
Global Senior Vice President, Volvo Group President

Cheng Jinglei
Chief Engineer, SAIC Motor
Invited Speakers

Industry Leaders

Leif Östling
Member of the Board of Management of Volkswagen AG

Sergio Marchionne
CEO of FIAT S.p.A

David Schoch
President, Ford Asia Pacific

Hubertus TROSKA
Member of the Board of Management of Daimler AG; Chairman and CEO of Daimler Greater China

Xiao Guopu
Vice President of Shanghai Automotive Industry Corporation

Hyuk Joon Lee
Vice President, Hyundai Motor Group (China) Ltd.

Jin Wenhui
Executive Vice President, Jiangling Motors Co., Ltd.

Enno Tang
President and CEO, Continental China

Christophe de Charentenay
Managing Director, Renault (Beijing) Automotive Co. Ltd
Vice President, Chinese Business Office of Renault China

Yuan Mingxue
Vice President, Changan Automobile

Weiming Soh
Executive Vice President, Volkswagen AG
EVP Group Strategy and Sales & Marketing, Volkswagen Group China

Torsten Klein
Senior VP, MAN
Invited Speakers

China Automotive Industry Forum

Government Officials

Wan Gang
Minister of Science & Technology, PRC; (Then) President of Tongji University

Miao Wei
Minister of Industry and Information Technology of PRC; (Then) President of Dongfeng Motor Corporation

Xia Bin
(Then) Director of Financial Research Institute of the Development Research Centre, State Council of PRC

Liu Shijin
(Then) Deputy Director of the Development Research Center of the State Council

Chen Qingtai
Research Fellow of Development Research Center of the State Council

Yao Jingyuan
Research Fellow of the Counsellors’ Office of the State Council

Xu Changming
Deputy Director, China Information Center

Antti Peltomaki
Deputy Director-General of the Enterprise and Industry Directorate-General, European Commission

Zhu Hongren
Former Party Member and Chief Engineer, Ministry of Industry and Information Technology

Ivan Stefanec
Member, European Parliament

Michal Boni
Member of the European Parliament

Pablo Zalba Bidegain
Member of the European Parliament
Academia & Speakers from Industry Associations

**Invited Speakers**

- **Wu Jinglian**
  Bao Steel Chair Professor of Economics of CEIBS

- **Pedro Nuno**
  Honorary President (European), CEIBS

- **Wang Luolin**
  Special Advisor & Professor of Chinese Academy of Social Sciences

- **Zhang Xiaoyu**
  Chairman of Society of Automotive Engineers of China

- **Dong Yang**
  Executive Vice President & Secretary General of the China Association of Automobile Manufacturers

- **Erik Jonnaert**
  Secretary General, European Automobile Manufacturers Association

- **Ouyang Minggao**
  Director of State Key Laboratory of Automotive Safety and Energy, Tsinghua University

- **Zhao Hang**
  Former Director, China Automotive Technology & Research Center

- **Yu Zhuoping**
  President of Auto College, Tongji University

- **Ivan Hodac**
  Founder and President, Aspen Institute Prague

- **Peter Tyroller**
  President of CLEPA, European Association of Automotive Suppliers

- **Jeffrey Sampler**
  Adjunct Professor of Management, CEIBS

- **Zhu Xichan**
  Director, Automotive Safety Technology Research Institute of Tongji University
For 16 consecutive years, we had a full audience of more than 400 people. All major foreign and local car manufactures and supplier companies were represented. Forum 2018 saw 548 participants, with the following charts showing attendance details:
Satisfaction Survey

The feedback from Participants was very positive. The majority of participants were happy with the networking opportunities the conference provided - it is a wonderful platform to facilitate further sharing and exchanging of information.

How would you rate the 16th Annual China Automotive Industry Forum 2018?

- Excellent: 9%
- Good: 12%
- Satisfying: 2%
- Not Very Good: 0%

Partners
Every year, the Auto Forum draws much attention from mainstream media both local and abroad. The Forum 2017 has generated 91 pieces of relevant coverage, namely, 1 piece of print media coverage, 16 pieces of important online media coverage, 23 pieces of other online media coverage, 51 pieces of WeChat and has created advertising value of RMB 172, 142.

I. Internet Live Coverage

39 pieces of online media coverage: advertising value of RMB 104, 000, including:

- 12 news reports by the National mainstream website like china.com.cn, sina.com.cn, sohu.com, 163.com, etc.;
- 7 news from Local major websites, such as hebnews.cn, scol.com.cn, etc.;
- 1 news from Major financial websites, vico.com;
- 19 news from other related website, like zhongguoaifu.com.cn, jiemian.com, yidianzixun.com, cyol.net, chexun.com, etc.

II. Print Media Coverage

1 piece of print media coverage are by Pudong Times with advertising value of RMB 17, 142.
Thank you!