

CCAM R&D&I Ecosystem in China

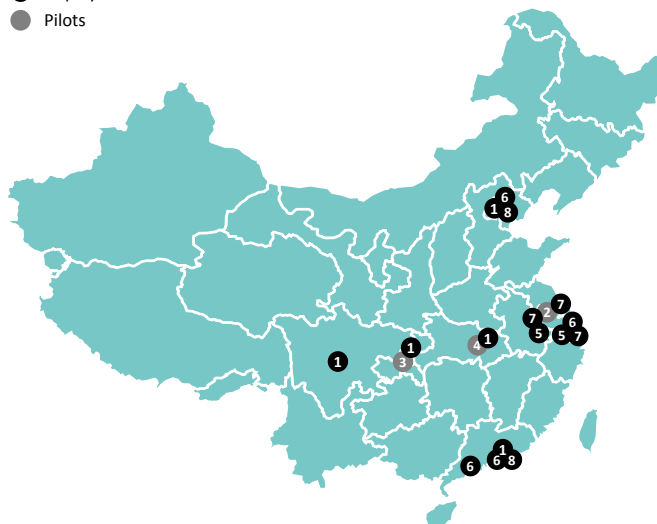


China is one of the world's largest markets for connected and automated mobility, supported by a major automotive manufacturing base and strong public and private investment in intelligent vehicles. Development is concentrated in cities such as Beijing, Shanghai, Shenzhen, Guangzhou and Wuhan, where large testing programmes and commercial autonomous

mobility services are operating. National policy is increasingly shifting the sector from experimental testing toward regulated market access and wider commercial deployment.

Main Stakeholders, Pilots & Deployments

- Deployments
- Pilots



POLICY

- Ministry of Industry and Information Technology (MIIT)
- Ministry of Transport (MOT)
- Ministry of Public Security (MPS)
- National Development and Reform Commission (NDRC)
- Ministry of Housing and Urban-Rural Development (MOHURD)

R&D PILOTS

- High-Level Autonomous Driving Demonstration Area
- International Automobile City
- National Intelligent Connected Vehicle Test Zone in Wuhan

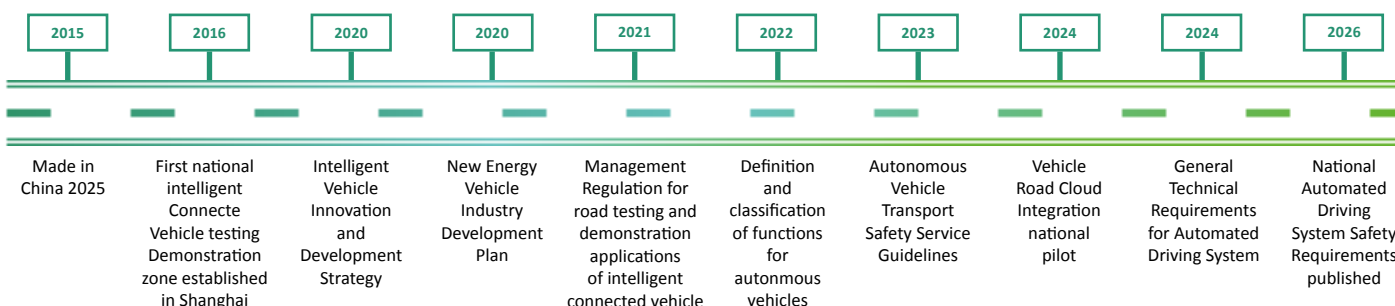
INDUSTRY



DEPLOYMENT

- 1 Apollo
- 2 AutoX
- 3 长安汽车 (Changan Auto)
- 4 东风汽车 (Dongfeng Auto)
- 5 Al Momenta
- 6 Pony.ai
- 7 SAIC
- 8 WeRide

National CCAM Timeline



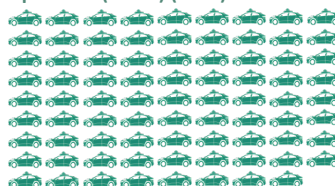
Primary R&D Topics

- Autonomous driving algorithms and AI
- Perception and environmental understanding
- C V2X and cooperative driving
- 5G and vehicle connectivity
- Vehicle Road Cloud Integration
- Smart roadside infrastructure
- Cloud and edge computing
- Robotaxi and autonomous public transport
- Simulation and scenario based testing
- Automated driving safety validation
- Cybersecurity and automotive data security
- Software defined vehicles and vehicle operating systems
- Digital Twin
- Dynamic Dashboards

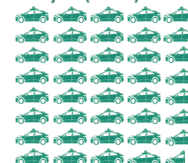
Relative Fleet Sizes

🚗 = 50

Apollo Go (Baidu) (4000)



Pony.ai (1975)



WeRide (1000)



Building Block Index

Successful implementation of CCAM depends on a combination of regulatory, organisational, technical and societal conditions that enable automated mobility solutions to move beyond pilot projects and into everyday operation. Europe has identified the following key Deployment Building Blocks (DBBs) to support this transition: Vehicle (inside the vehicle), Person (users, citizens, workforce), Physical & Digital Infrastructure (communication, roadside, server), Business, Design and operations (operational challenges, lessons learnt, integration into public transport) and Regulation. A qualitative assessment by the CCAMBassador team to see to what extent these building blocks are addressed in the various regions around the world led to the following insights / relative ranking. In China the most mature building blocks are Physical & Digital Infrastructure, Vehicle and Business, followed by Regulation, Design and operations and Person.

This factsheet is based on publicly available information, input from CCAMBassador experts and relevant national stakeholders. Despite best efforts to ensure accuracy and completeness, it should not be considered authoritative or exhaustive. Suggestions or remarks? Contact info@connectedautomateddriving.eu

