Chinese Brand OEM Telematics Industry Report, 2020

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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Abstract

Chinese Brand Telematics Research: Telematics system installation rate is close to 50%

In 2020, the Chinese OEMs are scrambling to ever faster iterate infotainment systems and add new features, which have been first available to new mass-produced cars:

1.In June, VENUS, SAIC Roewe's new infotainment system mounted on Roewe RX5 PLUS, was launched on market, offering new functions such as voice cloning, Alipay applet and car-home interconnection.
2.In June, BEIJING-X7 equipped with BAIC's Magic Box system was rolled out, with capabilities like face recognition, home interconnection, and AR navigation.
3.In July, BYD Han with BYD DiLink3.0 went on sale. The system features a 15.6-inch rotating center console screen and the "Littlie Di" voice icon;
4.In August, HAVAL Fun-Life 2.0 integrated with Tencent Auto Intelligence 3.0 (TAI 3.0) was first seen in HAVAL F7;
5.In October, Chery i-Connect@Lion4.0 system was launched with Tiggo 8PLUS, and new functions such as "Xiaoqi" intelligent assistant and voiceprint recognition were added;
6.In November, ORA ES11 (pre-sold in September), an electric car running ORA Smart-café? OS, was to become available on market.

From January to August 2020, a total of 4.43 million new vehicles in China were equipped with Telematics system from January to August 2020, a like-for-like increase of 4.0%, of which 1.75 million units were Chinese brand vehicles, down by 4.8% from the prior-year period. Yet homegrown brands led in penetration and saw a rate of up to 49.7% in the first eight months of 2020, up 9.2 percentage points over the same period of last year, according to the statistics of ResearchInChina. This indicates that Chinese brands have begun to include Telematics system in standard configuration of their new vehicles.

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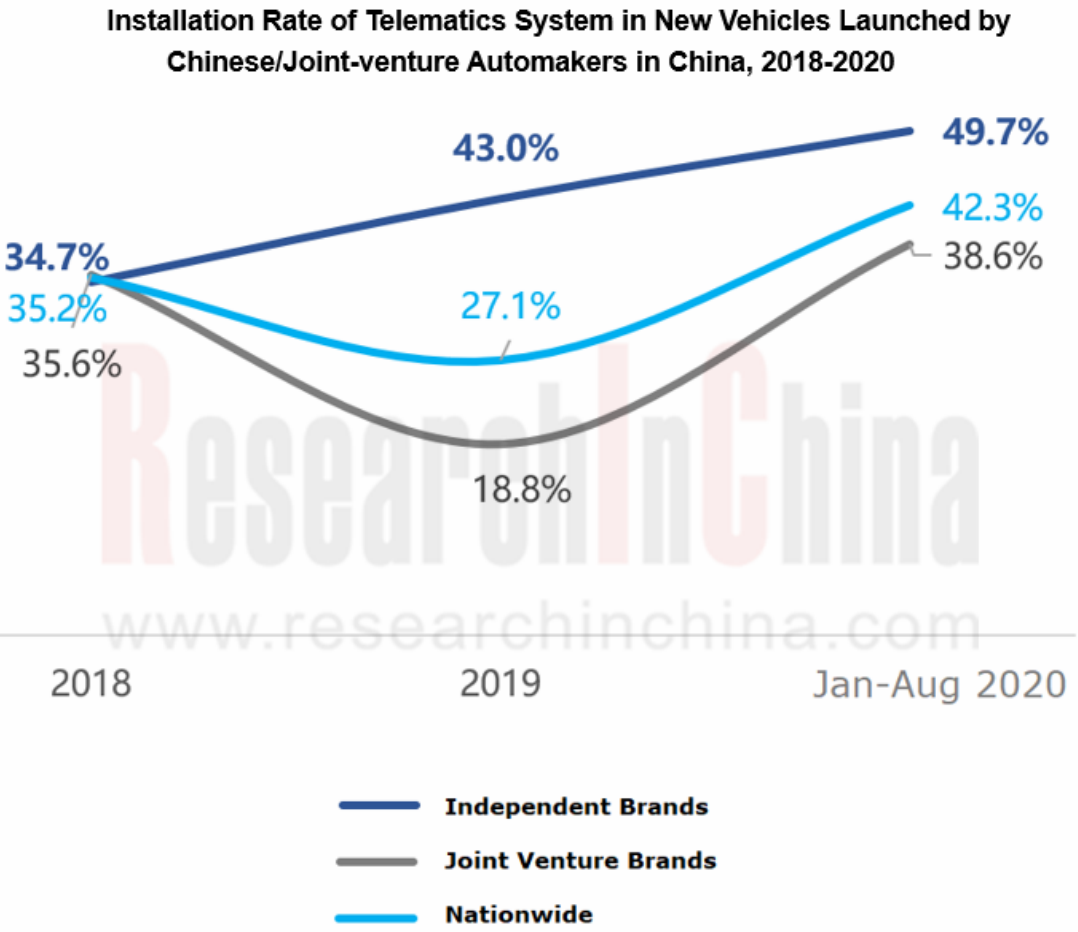

Source: China Independent Brand OEM Telematics Report 2020

The GKUI automotive intelligent system co-created by Geely and ECARX has been iteratively and functionally updated. As of July 2020, it has attracted more than 2 million users and been available to 40 models.

GKUI is a custom-made onboard system based on the Android system, having been iterated twice. The E01 SoC for GKUI 19 is defined by ECARX and designed by MediaTek. It uses a 64-bit quad core Central Processing Unit (CPU) that combines with dedicated Graphics Processing Unit (GPU) to support 1080p HD dual-screen display and a 4G modem. With AI Cloud, super voice, control interaction, versatile ID and other capabilities, GKUI 19 has been first available to 2020 Geely Boyue PRO. The E02 SoC with built-in 8-core CPU and independent neural processing unit (NPU) is expected to be mounted on vehicles in late 2020 or early 2021.

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Incall, Changan Automobile's telematics information system has undergone two generations of upgrade: the first generation was iterated to 3.0 and the second generation fuses with TAI. In 2018, Changan Automobile established the joint venture "Phoenix Auto Intelligence" with Tencent to provide a telematics development platform and big data analysis. At present, new models, such as CS85 COUPE, UNI-T and CS75 PLUS, have started installation of the TAI-integrated Incall system. Among them, UNI-T, which was launched in June 2020, carries the latest UNI Life automotive intelligent interaction system whose underlying layer is Incall and which uses AI chip of Horizon Robotics and integrates with a range of interaction capabilities, e.g., WeChat vehicle version, Tencent Map vehicle version, Tencent Dingdang voice interaction system, face recognition, and Tencent Aiquting.

Evolution of Changan Automobile's Incall System

System	Incall 1.0/2.0	Incall 3.0	Incall 3.0 + TAI
Position	Function device	Connected device	Intelligent device
Time	2012-2014	2015~	2018~
Platform	WINCE/Android	Android	Android
Online navigation	N/A	Baidu + Amap	Tencent
WeChat integration	N/A	N/A	√
Voice service provider	N/A	iFlytek	Tencent Dingdang
Voice controlled functions	N/A	Multimedia system, navigation, phone, air conditioner, sunroof	Multimedia system, navigation, phone, air conditioner, sunroof
First model available	Raeton/ CS75	CS75	CS85 COUPE

Source: China Independent Brand OEM Telematics Report 2020

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Great Wall Haval features two telematics systems: Hi-Life intelligent interconnection system and Fun-Life intelligent connectivity system. Of which, Fun-Life system is co-developed by Haval and Bean Tech, going through two iterations. Fun-Life 1.0 packing TAI 2.0 system, was first applied to 2020 Haval F5 and rolled out to the market in April 2020; the TAI3.0-integrated Fun-Life 2.0 was first found in 2021 Haval F7/F7x launched in late August 2020.

Comparison between Fun-Life 1.0 and Fun-Life 2.0 in Great Wall Haval

	Fun-Life 1.0 Intelligent Interconnection System	Fun-Life 2.0 Intelligent Connectivity System
Launch Time	Apr. 2020	Aug. 2020
Development	Co-developed by Haval and Bean Tech	
Features	◆ Hardware: TI J6 chip ◆ Integrated with TAI2.0, Tencent Aiquting 2.0, and audio contents, e.g., QQ Music, Ximalaya FM, Tencent News, Tencent Sports, and WeRead ◆ Tencent's new-generation voice recognition system, with available wake-up words, e.g., "Hello Haval", "summon Li Bai" and "summon Da Ji" ◆ WeChat vehicle version; an exclusive WeChat button on the steering wheel ◆ Voiceprint recognition ◆ Car-home interconnection platform connecting JD Whale (JD IoT) ◆ Built-in Amap and Tencent maps	◆ Hardware: Renesas RCM3 auto-grade 8-core processor operating at up to 1.5GHz and with 6GB DD R4 RAM and 32BG EMMC 5.1 high-speed storage hard disk ◆ Integrated with TAI3.0, two vehicle APPs (Tencent Suixing and Tencent Aiquting), and Tencent full duplex voice system ◆ Bean Tech's smart scenario engine: X reactor, including functions, e.g., boot voice, car assistant, time capsule and space capsule ◆ Addition of Bilibili small entertainment scenarios, and access to Bilibili ◆ Built-in Amap and Tencent maps; addition of Amap-based last-mile navigation ◆ Ecological account: one-key binding
First Model Available	2020 Haval F5	2021 Haval F7/F7x

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Chinese brand telematics is expected to be headed in following directions:
1. At present, the installation of telematics in new Chinese brand vehicles approximates 50%. Telematics is expected to become a standard configuration in over 100,000 models in future.

2. Chinese brands keep ahead of others by leveraging abundant ecosystem resources of internet giants like BAT (Baidu, Alibaba and Tencent). Examples include Banma Zhixing co-built by SAIC and Alibaba, Fun-Life system developed by Great Wall Motor together with Tencent, and i-Connect@Lion 4.0 Chery designed in harness with Baidu.

3. Since the outbreak of COVID-19, foreign brands have expedited deployments in telematics. In April 2020, SAIC Volkswagen announced an intelligent telematics system, and partnered with TAI, Amap, JD, Alibaba Cloud and China Mobile to strengthen localization. In July 2020, Dongfeng Nissan updated Nissan Connect system and launched the "Intelligent Connectivity Future" plan. In July 2020, BMW and Tencent formed a digital partnership to promote application of "Tencent Mini Scenarios" and WeChat vehicle version in BMW cars.

4. For functions, navigation, voice assistant, and entertainment ecosystem have become the standard configuration of new cars. All OEMs are enriching infotainment with capabilities such as large/multi-screen/jilt display, WeChat vehicle version, voice personalization/virtual image, onboard KTV, Douyin, car-home interconnection, fleet build-up and applets, as well as mobility services (refueling/washing/insurance). In future, ever more smartphone functions will be incorporated to in-vehicle infotainment system.

5. Advances have been made in the availability of 5G telematics technology in Chinese brand vehicle models. For example, Huawei 5G technology is used in production models like GAC Aion V (launched in Jun. 2020), BYD Han (launched in Jul. 2020), Roewe MARVEL R (presale in Sept. 2020), and BAIC BJEV ARCFOX αT (launched in Oct. 2020). In April 2020, Huawei initiated the "5G Automotive Ecosystem", with 18 automaker members including FAW Group (FAW Hongqi, FAW Besturn, FAW Jiefang), Changan Automobile, Dongfeng Motor (Dongfeng Passenger Vehicle and Dongfeng Xiaokang), SAIC Group (SAIC Motor Passenger Vehicle and SAIC GM Wuling), GAC Group (GAC NE), BAIC BJEV, BYD, Great Wall Motor, Chery, JAC, Yutong Bus, SERES, NAVECO and T3 Mobility.

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