

Tesla Soars on Tentative China Approval for Driving System

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By Bloomberg News 作者: 彭博新闻

Tesla Soars on Tentative China Approval for Driving System

驾驶系统获得中国暂定批准，特斯拉股价飙升

- Carmaker to partner with tech giant Baidu on maps, navigation
汽车制造商与科技巨头百度在地图、导航领域合作
- Musk sought clearance from Beijing for potential revenue boost
马斯克寻求北京方面的批准以增加潜在的收入

Elon Musk's quick visit to China paid immediate dividends, with Tesla Inc. receiving in-principle approval from government officials to deploy its driver-assistance system in the world's biggest auto market.

埃隆·马斯克对中国的快速访问立即带来了回报，特斯拉公司原则上获得了政府官员的批准，可以在全球最大的汽车市场部署其驾驶辅助系统。

The US carmaker was granted the approval under certain conditions, according to a person with knowledge of the matter, who asked not to be identified because details of all the criteria aren't clear.

Tesla did manage to clear two of the most important hurdles: reaching a mapping and navigation deal with Chinese tech giant Baidu Inc., and meeting requirements for how it handles data-security and privacy issues.

据一位知情人士透露，这家美国汽车制造商在某些条件下获得了批准。该知情人士要求匿名，因为所有标准的细节尚不清楚。特斯拉确实成功清除了两个最重要的障碍：与中国科技巨头百度公司达成地图和导航协议，以及满足其处理数据安全和隐私问题的要求。

BloombergHyperdrive 彭博超级驱动器Tesla Sales Have Peaked in California, Industry Group Predicts
行业组织预测特斯拉在加州的销量已达到顶峰Musk's Trip to Beijing After India Snub Shows Power of China
印度冷落后马斯克的北京之行显示了中国的力量BYD Revenue Misses Estimate as China EV Discounts Take Toll

中国电动汽车折扣造成比亚迪收入低于预期As Musk Visits China, Tesla Wins Key Data Security Clearance
随着马斯克访问中国，特斯拉获得关键数据安全许可

Tesla shares soared 15% Monday, its best day in more than three years, while Baidu's American depositary receipts closed 5.6% higher. Tesla didn't respond to requests for comment on the status of its attempt to secure regulatory approval.

特斯拉股价周一飙升 15%，创三年多来最好单日涨幅，

而百度美国存托凭证收盘上涨 5.6%。特斯拉没有回应对其寻求监管批准的进展置评的请求。

The developments came after Tesla Chief Executive Officer Elon Musk made an unannounced trip to China on Sunday, seeking approval for driver-assistance software that could help arrest the carmaker's revenue decline. While the company's suite of features require constant supervision and don't make Teslas autonomous, the company charges \$8,000 for them in the US, or \$99 a month for a subscription.

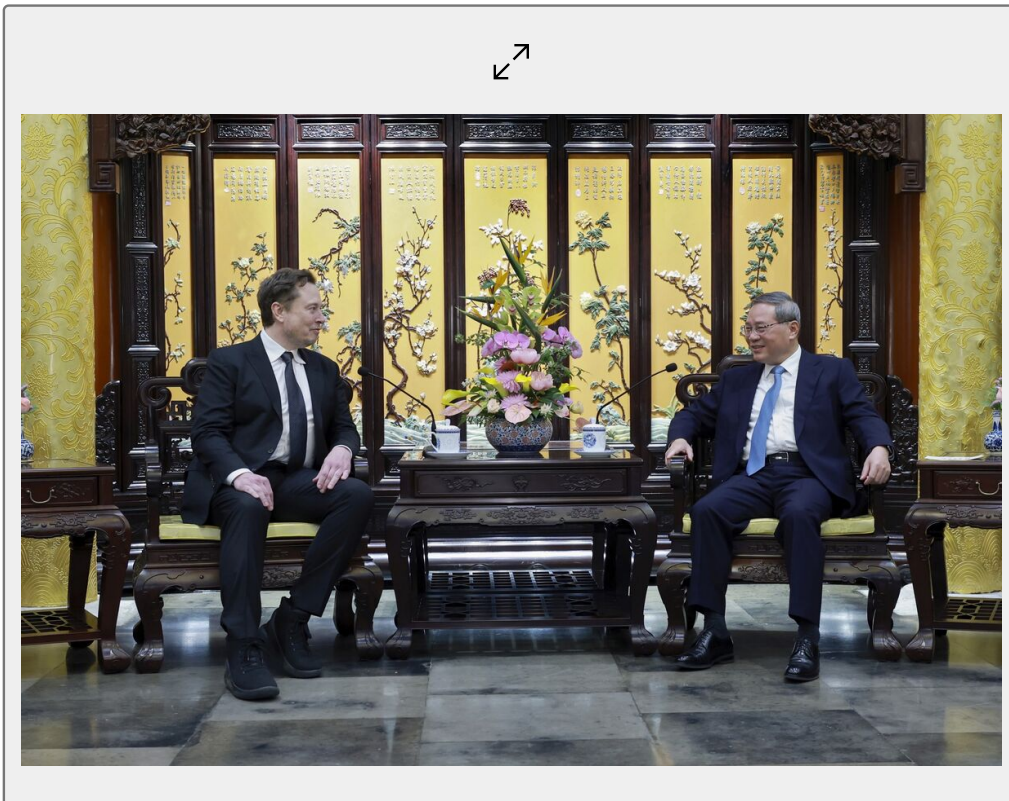
在此之前，特斯拉首席执行官埃隆·马斯克周日未经宣布访问中国，寻求驾驶辅助软件的批准，以帮助遏制该汽车制造商的收入下滑。虽然该公司的一系列功能需要持续的监督，并且无法让特斯拉实现自动驾驶，但该公司在美国的收费为 8,000 美元，或者每月 99 美元的订阅费。

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阅读更多：印度冷落后马斯克的北京之行显示了中国的力量

Musk met Sunday with Premier Li Qiang, who as the Chinese Communist Party secretary for Shanghai helped the company set up what is now its top plant globally. His private jet left Beijing on Monday, according to FlightRadar24.

马斯克周日会见了中国国务院总理李强，李强在担任上海市委书记时帮助该公司建立了目前全球最大的工厂。据 FlightRadar24 报道，他的私人飞机于周一离开北京。



Elon Musk meets with Chinese Premier Li Qiang in Beijing on April 28. Photographer: Wang Ye/Xinhua/AP Photo

埃隆·马斯克于 4 月 28 日在北京会见中国国务院总理李强。摄影：王野/新华社/美联社照片

While Tesla initially enjoyed a red-carpet welcome in China, its fortunes have faded recently as it faces tougher competition from domestic EV makers led by BYD Co. Tesla's share of China's auto market shrank to around 6.7% in the fourth quarter of 2023, from 10.5% in the first quarter of last year, according to Bloomberg calculations based on China's Passenger Car Association data.

尽管特斯拉最初在中国受到了红地毯的欢迎，但最近由于面临以比亚迪公司为首的国内电动汽车制造商的更激烈竞争，其命运逐渐黯淡。特斯拉在中国汽车市场的份

额在 2023 年第四季度缩减至 6.7% 左右。据彭博社根据中国乘联会数据计算，去年第一季度增长了 10.5%。

Read more: Can Musk's Robotaxi Dream Fix What's Ailing Tesla?: QuickTake

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Advanced driver-assistance systems are becoming increasingly common in China, with many local players including Xpeng Inc. and Xiaomi Corp. using them as a selling point for vehicles. Carmakers also have had success in charging extra for driver-assist features, which Tesla could use after having cut prices to levels that may have wiped out the operating profit it's earning from the market.

先进的驾驶辅助系统在中国变得越来越普遍，包括小鹏汽车和小米公司在内的许多本土企业都将其作为车辆的卖点。汽车制造商还成功地对驾驶员辅助功能收取额外费用，特斯拉在将价格降低到可能抹去其从市场上赚取的营业利润的水平后可以使用该功能。

Approval for FSD in China would be a major boost for Tesla, which is coming off its first year-over-year decline in quarterly revenue since 2020. Even after slashing prices, the company sold fewer cars in the first quarter. Musk is cutting headcount by at least 10% and looking to accelerate new models, including less-expensive vehicles, that could be ready by early

2025, if not before year-end.

FSD 在中国获得批准将对特斯拉产生重大推动作用，该公司正摆脱 2020 年以来首次出现季度收入同比下降的局面。即使在大幅降价之后，该公司第一季度的汽车销量仍然有所减少。马斯克正在裁员至少 10%，并希望加速推出新车型，包括价格较便宜的汽车，这些车型可能会在 2025 年初（如果不是在年底之前）准备就绪。

Musk's surprise China visit is “a watershed moment,” Wedbush Securities senior analyst Dan Ives said in an interview with Bloomberg Television. “This could open up FSD in China, which I view as unlocking what really could be the golden opportunity for them.”

韦德布什证券公司高级分析师丹·艾夫斯在接受彭博电视台采访时表示，马斯克出人意料的中国之行是“一个分水岭”。“这可能会打开 FSD 在中国的大门，我认为这为他们释放了真正的黄金机会。”

Teaming with Baidu — one of about only 20 qualified suppliers with the country's top-level mapping credentials that can be applied to driver-assistance functions — will allow Tesla to tap the Chinese company's lane-level navigation and mapping services. Tesla has been using Baidu for in-car mapping and navigation since 2020.

与百度合作——大约20家拥有中国顶级地图资质、可应用于驾驶辅助功能的合格供应商之一——将使特斯拉能够利用这家中国公司的车道级导航和地图服务。自2020年以来，特斯拉一直使用百度进行车内地图和导航。

While getting the green light for FSD in China might help Tesla claw back some lost ground, its driver-assistance systems have proved problematic in the US. The top US auto-safety regulator just opened a probe into the company's less-capable Autopilot system, citing 20 crashes that have occurred since December involving vehicles that received an over-the-air software update to prevent misuse.

虽然在中国获得 FSD 许可可能有助于特斯拉收复一些失地，但事实证明，其驾驶辅助系统在美国存在问题。美国最高汽车安全监管机构刚刚对该公司功能较弱的自动驾驶系统展开调查，并列举了自 12 月以来发生的 20 起事故，这些事故涉及的车辆都接受了无线软件更新以防止滥用。



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Bloomberg Intelligence: Elon Musk Visits China (Podcast)

彭博资讯：埃隆·马斯克访问中国（播客）



42:34

During an earnings call last week, Musk emphasized the importance of autonomous-driving development, saying that people who doubt Tesla's ability to "solve" autonomy shouldn't invest in the company.

在上周的财报电话会议上，马斯克强调了自动驾驶开发的重要性，并表示怀疑特斯拉“解决”自动驾驶能力的人不应该投资该公司。

Read this next: Elon Musk's Robotaxi Dreams Plunge Tesla Into Chaos

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The Wall Street Journal reported^{□□} earlier Monday that Chinese officials had told Tesla that Beijing had tentatively approved the company's plan to launch FSD in the country.

《华尔街日报》周一早些时候报道称，中国官员告诉特斯拉，北京方面已初步批准该公司在中国推出 FSD 的计划。

— With assistance from Charlie Zhu, Chunying Zhang, Dana Hull, and Kelly Gilblom

— 在 Charlie Zhu、Chunying 张、Dana Hull 和 Kelly Gilblom 的协助下

(Updates with Tesla closing shares in third paragraph.)

(第三段更新了特斯拉收盘价。)

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