

Institute of Chinese Studies

WEDNESDAY SEMINAR

*China's Electric
Vehicle Industry:
Strategic Approaches
and Policy
Implications*

EXECUTIVE SUMMARY

Speaker:

Saheli Chattaraj

29 October 2025

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Speaker: Dr. Saheli Chattaraj, Assistant Professor, China Studies, School of Humanities and Social Sciences, Somaiya Vidyavihar University, Mumbai.

Chair: Mr. Santosh Pai, Partner, Dentons Link Legal; and Treasurer and Honorary Fellow, Institute of Chinese Studies, New Delhi.

Venue: Zoom Webinar

- The seminar analysed the evolution of China's EV sector as a case study in industrial modernisation and state-led innovation. Dr. Saheli Chattaraj examined how policy coherence, supply chain integration and rare earth resource management underpin China's rise as a global EV powerhouse.
- The Chair, Mr. Santosh Pai, underscored that the automobile industry remains vital to global growth, employment, and technological progress. China's policy focus on EVs reflects its drive to build "new productive forces". With ongoing debates over overcapacity and market rationalisation, this is a key moment to reassess China's EV strategy before the 15th Five-Year Plan.
- The discussion situated the EV industry within the continuum of China's developmental trajectory, where "opening up" and technological self-reliance coexist as dual imperatives. Dr. Chattaraj traced the industry's progression from the pilot initiatives of the 2000s to the consolidated ecosystem of the 2020s, marked by regional clustering, vertical and horizontal integration and policy-driven technological iteration.
- The 14th Five-Year Plan and the New Energy Vehicle Industry Development Plan (2021–2025) collectively emphasise innovation in batteries, motors, electronic controls, and recycling systems, reflecting the state's commitment to sustainability and industrial upgrading.
- A core theme was the centrality of rare earth minerals. By monopolising extraction, refining and export quotas, China has secured its position at the intersection of energy transition and geopolitical competition. Dr. Chattaraj highlighted how this control

reduces costs, accelerates R&D and provides diplomatic leverage, enabling China to shape global standards in green technology.

- The speaker also acknowledged enduring vulnerabilities, including dependence on foreign patents, potential market saturation, and rising protectionism abroad.
- The session concluded with reflections on future trajectories. The speaker questioned whether the forthcoming 15th Five-Year Plan will continue to treat the EV industry as a strategic sector, how export controls could affect India's EV ecosystem, and whether new low-emission technologies could potentially challenge China's dominance. The seminar underscored that the EV sector exemplifies China's broader quest for industrial modernisation, which is anchored in coordination, innovation and strategic control of critical materials.

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