LA LETTRE DU GERPISA

RESEAU INTERNATIONAL
INTERNATIONAL NETWORK

N° 158

FÉVRIER – MARS 2002

Editorial

Yannick Lung

LA 10ème RENCONTRE INTERNATIONALE DU GERPISA

Pour la dixième année consécutive, le colloque international du GERPISA permettra de réunir les chercheurs en sciences sociales qui analysent en profondeur au quotidien les transformations de l'industrie automobile mondiale. Ce colloque marque l'achèvement du projet européen CoCKEAS et du troisième programme de recherche *La coordination des compétences et des compétences dans les systèmes automobiles régionaux.* La présentation des résultats de ce programme et les réponses à l'appel à communication permettent d'apprécier le développement des compétences de notre réseau. Le programme provisoire du prochain colloque sera bientôt disponible sur le serveur du GERPISA, mais les premiers enseignements peuvent être tirés.

Depuis le premier colloque international en juin 1993, le GERPISA fédère à travers le monde un ensemble de chercheurs dont les travaux permettent d'appréhender les trajectoires des firmes et des pays automobiles. Lors de notre prochaine rencontre, plusieurs contributions permettront de poursuivre l'analyse des évolutions en la matière - dont une analyse synthétique sera proposée à la communauté scientifique avec la publication d'ici la fin de cette année de deux ouvrages collectifs du GERPISA engagés à l'occasion du second programme : l'un sur les stratégies d'internationalisation des constructeurs ; l'autre sur les processus de régionalisation. Une place privilégiée sera faite aux relations entre constructeurs et équipementiers qui sont au cœur de la coordination des compétences et des connaissances.

Le troisième programme aura permis de focaliser les travaux des membres du réseau sur la gestion de l'innovation, à travers les recherches portant sur la diffusion de la production modulaire, les pratiques d'alliances et de co-développement ou encore la mobilisation des compétences dans les ateliers.

THE 10th GERPISA INTERNATIONAL COLLOQUIUM

For the 10th year in a row, the GERPISA International Colloquium will be a chance for the many social science researchers who conduct on a daily basis in-depth analyses of the transformations of the world's automotive industry to get together. This colloquium will mark the completion of both the European CoCKEAS project and of the GERPISA third research programme, *Coordinating Competencies and Knowledge in Regional Automotive Systems*. Presentations of the programme's findings and the responses to its call for communications will allow us to assess the progress that has been made in our network's competencies. The provisional programme for the next colloquium will soon be available on the GERPISA website - although some early lessons can already be drawn.

Since its initial international colloquium in June 1993, the GERPISA has brought together from the four corners of the planet a wide range of researchers whose work has enhanced understanding of firms' and countries trajectories in the world automotive industry. Several of the contributions that are to be made at our upcoming meeting will help us to continue our analysis of developments in this field. This includes two collectively written GERPISA books that will be published before year end. Written for the benefit of the scientific community, these analytical summaries were initiated during our second research programme: one deals with carmakers' internationalisation strategies; the other with processes of regionalisation. Emphasis will be placed on the relationships between manufacturers and components makers, ties that are key to the co-ordination of competencies and knowledge. The third programme will have been an opportunity to focus on the work that the network's members have done in areas such as innovation management; modular production; co-development practices; or the mobilisation of competencies at the workshop level.

<u>*In English*</u>: *Editorial* (p.1): The 10th Gerpisa International Colloquium. *Debat* (p.2): Carmakers Internationalisation Strategies : An Overview - (p.6): European Specificities, American Actors and the New Regulations Concerning Car Distribution. *Firms News* (p.8): Will Ford Find Profit by Getting « Back to Basics ».

Trop absentes lors de nos dernières rencontres, les reconfigurations de la relation salariale seront plus largement débattues, rappelant l'importance des contraintes liées à la mobilisation de la force de travail.

En contrepartie, d'autres dimensions ne seront traitées que par une ou deux communications, notamment en ce qui concerne les activités immatérielles dans l'industrie automobile. La réflexion engagée sur la financiarisation à l'occasion des travaux réalisés dans le cadre du projet CoCKEAS – dont les principaux résultats seront présentés en séance plénière et qui donneront lieu à un prochain volume de la revue *Competition and Change* – mérite pourtant d'être prolongée tant les évolutions récentes (notamment pour Ford) posent de nouvelles questions. De la même façon, à travers la nouvelle politique de la Commission Européenne ou l'internationalisation esquissée par l'acquisition du groupe anglais Sytner par l'américain UnitedAuto Group, l'actualité récente souligne la nécessité d'approfondir l'analyse des transformations en matière de distribution automobile. Enfin, sur le plan technologique, l'étude des impacts résultant de la diffusion des technologies de l'information et de la communication sera à peine entrevue ; quant aux enjeux environnementaux de l'automobile, ils seront au mieux esquissés.

Sans abandonner les compétences fondamentales (l'analyse de la relation salariale, de l'organisation productive, de l'internationalisation, etc.) qui assurent la pérennité de notre réseau, on mesure que l'effort engagé pour traiter les nouveaux enjeux de l'industrie automobile mérite d'être consolidé pour mettre à l'épreuve les avancées conceptuelles que le GERPISA a pu proposer au cours des dix dernières années. Ce devrait être à l'occasion d'un nouveau programme international de recherche qui reste à définir.

The reconfigurations of the employment relationship, absent far too often from our recent meetings, will be widely discussed, reminding us of the significance of the constraints associated with workforce mobilisation.

Conversely, other elements will be the subject of one or two communications at best, for instance, the immaterial activities that can be found in the automobile industry. However, the discussions on financialisation that took place as part of the work carried out within the framework of the CoCKEAS project (whose main findings will be presented in a full session and used as the basis for an upcoming double issue of *Competition and Change)* deserve to be continued, particularly in light of the new issues that have been raised by certain recent developments (notably for Ford). Similarly, current events (i.e., new European Commission policies, internationalisation drives such as the takeover of England's Sytner group by the American UnitedAuto Group) have stressed the need to deepen our analysis of the transformations happening in the field of automobile distribution. At the technological level our studies of the effects of ICT diffusion are still in their early stages. And we have barely scratched the surface of the environmental challenges of the automobile.

We have no desire whatsoever to abandon the fundamental competencies that have long underpinned our network's longevity (analyses of employment relationships, productive organisations, types of internationalisation, etc.) but to test the conceptual progress that the GERPISA has achieved over the past decade we clearly need to consolidate our initial dealings with the new issues that the automobile industry has been facing. Our new international research programme, whose exact nature remains to be defined, should provide us with an opportunity for this.

Débat

CARMAKERS INTERNATIONALISATION STRATEGIES : AN OVERVIEW[1]

Giuseppe Volpato

The relevance of the internationalisation process in the automobile industry

The internationalisation of the automotive industry is a typical feature of the establishment of the first automakers who, as soon as they were able to offer products with enough competitiveness and reliability to domestic customers, did test their luck in foreign markets searching for the scale economies which were necessary to gain position in an industry in which manufacturing investments were undoubtedly high.[2] But also a quick thought on the history of such industry and a glimpse to the current structure of the automobile supplychain clearly show how the past forms of internationalisation differ from those currently being developed. To a certain extent we could say that the history of internationalisation of the automotive industry is the history of the automotive industry *tout court*, given the extraordinary role which such phenomenon has always played, both in defining the type of competitive confrontation between automakers, and in the evolution of growth and consolidation strategies by automakers and by their suppliers.

Such statement aims at underlining the two-edged nature of the phenomenon of internationalisation in the automotive industry, on the one hand always present, but on the other hand always different compared to that which had developed in the previous years, due to the changes in automobile demand in the various markets, to the degree of maturity of the competitive challenge among industry players, to the evolution of product and manufacturing process technologies, to the opening of the various national economies to exchanges and multi-lateral agreements.[3]

[1] This paper will introduce the GERPISA volume on the strategies of internationalisation in the auto industry to be published this year (Palgrave, London and New York).

[2] See for example: Bardou et al. [1977], Bonnafos et al. [1983], Volpato [1983], Laux [1992], Chanaron and Lung [1995].

[3] On the reorganisation of the automobile industry which took place after the oil shocks of the 1970s see Freyssenet et al. [1998].

Hence if one wants that internationalisation, as a concept both descriptive and interpretative of some of the most relevant aspects of the automotive supply chain, has some hermeneutic meaning, it must be storicised, in other words applied to a given historical time and described in the aspects which derive from it, with respect to any automaker.

The multiplicity of forms of internationalisation

It is commonly agreed to divide the internationalisation process in many stages, which represent the stages of progress in the manufacturing and marketing organisation of industry firms on a multi-national scale. Given the aims of introduction here, compared to the essays which follow, it is worth to list, although briefly, the various roles of the internationalisation process which at the beginning was measured by the amount of direct foreign investment. It was therefore referred to as:

- ✓ Export of completely-built-up vehicles (CBU). It is important to note that, contrary to popular belief, such first stage represents an important international involvement as well, since it implies the establishment of a decentralised marketing organisation, a network of dealers and service agents, a system of parts warehouses, a logistics organisation for their shipment to end customers, and finally marketing and promotion activities, with a multi-year time-frame. All of this implies relevant investments, often higher than those required by small manufacturing and assembly plants. The failure of some European automakers in entering the North American market as well as of some North American firms in entering Europe through various historical stages, including most recent ones, stems just from the complexity of problems which arise even during such first step of the internationalisation process and from the difficulties shown by firms in adapting the marketing and product strategies, which were successfully carried out in the domestic market, to the need of foreign markets.
- ✓ Assembly abroad of vehicles semi-knocked-down (SKD), that is vehicles partially assembled which require further operations, mainly with respect to the coupling of internal parts to the external body. It is a rather frequent solution in the first stages of the internationalisation process, but currently seldom applied outside the manufacturing of vehicles in small volumes.
- ✓ Assembly abroad of vehicles completely-knocked-down (CKD), that is complete assembly of vehicles whose individual parts are imported from abroad.
- ✓ Assembly of vehicles CKD through component parts partially manufactured in the same country and partially imported.
- ✓ Assembly of vehicles CKD starting from components wholly manufactured in the country where assembly takes place. A further development of such stage can consist in the organisation of product export flows by the foreign country where assembly takes place towards more export markets (or even return exports to the country where the automobile company is based).

New forms of internationalisation

However at the beginning of the 1990s it became evident that these forms of internationalisation, believed to be the most typical and relevant within the strategies adopted by automakers, albeit important, were not exhaustive since they all revolved around a single parameter: the one based upon the degree of manufacturing integration achieved by automakers in the country where the end product was directed. Such integration was minimal when there was export of complete vehicles, while it was maximum with local manufacturing of parts and final assembly. With the change in industry equilibria which took place mainly in the 1990s, it became evident that internationalisation is a fact which presents a range of forms which cannot be mainly related to the degree of manufacturing integration. It encompasses a growing set of features which tend to play a higher role which relates mainly to the organisational, financial and decision-making aspects.[4]

- ✓ The forms of internationalisation referred to organisational aspects can be defined by an automaker within a continuum between two extremes: on the one end an internationalisation based upon a high standardisation of the various organisational and decision-making forms of activities located abroad, according to a replication of procedures adopted in the mother company, and on the other end an eclectic organisation inspired by localism, where in each individual market the organisational criteria are driven by the specific traits of the foreign situation.
- ✓ Financial aspects are manifold. They range from less *invasive* forms of financial internationalisation which are characterised by the forms of acquisition and the source of borrowed capital, to stronger forms which can affect the degree of international dispersion of capital, mainly in cases in which foreign placements of stocks are not acquired by individual investors, merely interested to returns for the specific investment, but by other companies in the industry which swap stocks in order to strengthen the range of agreements which are played mainly on the industrial front. Then comes the most relevant form of financial internationalisation, in which an automobile company holds such a relevant stake in a foreign automaker, to become the economic subject of reference, which inspires the manufacturing and marketing strategies.
- ✓ Also decision-making aspects can be framed according to the various forms of internationalisation. With the growth in forms of internationalisation which has already been described, the possibility of coordinating on a tight basis the policies adopted by individual makes controlled by an automobile company acquires a specific meaning.[5] In the past, both due to the com-

[4] See: Boyer et al. [1998], Carrillo et al. [2002] (forthcoming), Freyssenet and Lung [2001, 2002] (forthcoming).

[5] We hereby refer to the concept of globalisation in the meaning defined by Porter [1986] according to whom an industry can be defined as global is there are competitive advantages deriving from the integration of activities on a worldwide scale.

plexity of phenomena and to the absence of communication media which were adequate for the problems to deal with and to be solved, the forms of decision-making internationalisation were rather modest. But now, thanks also to the innovation potential offered by the most recent systems of Information & Communication Technology (ICT), the possibility to develop competitive strategies on a worldwide scale appears as hard a goal as it is necessary (at least as an end objective) for all its implications and it is currently pursued more and more firmly by all automakers, albeit with different paths and priorities. In this case as well, the forms of globalisation of decision-making choices can develop on a set of areas of application, whose choice and development offer very relevant potential competitive advantages. By limiting ourselves to the analysis of the forms which are currently involving automakers to a greater extent, we must mention at least two specific areas.

- ✓ The design of shared platforms. The search for scale and scope economies by suppliers can be adequately exploited only with forms of further product standardisation by automakers. However it is now evident that the "simple" forms of internationalisation based upon the offer of a same model for a range of markets (world car) turned out to be a failure This has emerged with the difficulties encountered in transferring products within the most advanced markets in the triad (USA, Western Europe, Japan), but the inadequate standardisation of models is due to exacerbate as emerging markets consolidate (Eastern Europe, Latin America, China, India and so on)[6]. Therefore automakers are experimenting new forms of standardisation, more refined and complex, yet partial as they aim at using common parts without the standardisation of models, which must maintain margins of customisation both related to the various national markets, and to the specific needs of the individual end customer[7]. Such process moves along the design of "common platforms" capable of using a relevant number of common sub-systems, but leaving the freedom to develop the body and other elements more readily visible to the customer according to forms which are differentiated for the individual markets. It is a key move, in order to obtain considerable cost advantages, which is also hard and complex as well. No automaker can declare to have achieved it in a satisfactory way, but all of them, without exception, are moving towards it, aware that only in such way they will manage to solve the current contradiction between the advantage of expendable variety on the marketing side, and standardisation linked to low-cost and high-quality manufacturing.
- ✓ System integration and modularisation. Another key element of the strategic reorganisation of the automotive supply chain is the design of the vehicle by parts or systems, and modularisation of assembly. They are different features, which must be considered separately, albeit they share some common aspects. Vehicle design by systems which are internally integrated stems from the fact that the vehicle can be described as a set of functional groups, each of whom is in charge of carrying out different tasks: production of moving energy and its transmission to the wheels (engine and powertrain), the braking system, the vehicle driving system, the control system, the exhaust system. In the past such systems had, on the design standpoint, a low degree of internal integration since they were made of single mechanical elements which could be designed with modest levels of interdependence. Currently all these functional systems have a very high degree of integration due to the fact that their operation is governed by electronics. In substance, each functional system is no longer the mechanical sum of many different parts, but represents an integrated complex which can be designed in an optimal way only through a unitary direction, carried out by a supplier acting as *system integrator*.[8] On the other hand, the phenomenon of modularisation does not refer to the design of individual component parts of a functional system, but focuses on its assembly and on the testing activities to be carried out in the stage which comes immediately before the transfer onto the vehicle assembly line.

  The module is therefore a macro-component, made up of many parts, which it is possible and economically attractive to assemble and test outside the vehicle final assembly line, in order to increase its simplicity and speed. In some cases it can therefore happen that a functional system is a module, as in the case of the powertrain of the exhaust emission system, but in other cases this may not happen. For example the vehicle lighting system or the driving system clearly represent functional systems, but their complexity and their extension over a set of vehicle parts prevent their pre-assembly as modules.[9]

All these new forms of design and coordination of activities are intrinsically linked to the phenomenon of internationalisation since on the one hand the possibility to fully exploit the synergies deriving from these strategies lies in the development of a wide-ranging internationalisation process, and on the other hand because the continuing tension between the acquisition of competences necessary to develop these highly complex projects and the constant compression of costs implies the selection both of partners with highly sophisticated technologies in the most advanced industrial areas, and of partners featuring low manufacturing costs in the emerging areas.

6. On NICSs automotive industry see in particular Humphrey et al [2000].

7. For an analysis of the evolution of variety strategies developed over time by automobile companies see the set of essays in Lung et al. [1999]. On the concept of *world car* and of *common platforms* see Camuffo and Volpato [1997], Volpato and Stocchetti [2000].

8. The Key characteristic of a system integrator is the undertaking of the execution of most relevant technical tasks in the product/system chain and the coordination of the chain's technical and operational performance over time.

9 On this subject see Sako and Warburton [1999].

The de-stabilising aspect of the globalisation process

The globalisation process under way is a sign of response to a situation of strong competitive tension[10] but it has become in turn a case of further de-stabilisation depending on the variety of strategies adopted by some automakers which are obviously characterised by different evolutionary trajectories (*path dependency*) and by different profit strategies. In such sense the policy of globalisation which had initially acted as a "response" strategy to the tensions triggered by the competitive challenge is becoming, within the complex system of interdependencies of the international automotive supply chain, the triggering factor for further initiatives by companies which see themselves threatened by recent transformations.

The set of essays to be published in the GERPISA volume will describe in a rich and detailed the way the variety of internationalisation models developed by the main automakers in the different markets. While directing the reader to them for a full appreciation of the pros and cons of the various strategies, it is however worth here to underline two phenomena which are both relevant and general: on the one hand the fast and to some extent astonishing swapping of the competitive positions which marks one more time a strong diverging trend for the individual automakers, hence the sustainability of different profit strategies[11] and on the other hand a sort of convergence by individual automakers towards an attempt to strongly reduce their vertical integration.

With respect to the swapping of competitive positions it is very significant that a considerable number of automakers who over the recent years did show a marked level of activity, mainly through policies of acquisitions, mergers and equity alliances such as Daimler-Chrysler, Ford and GM-Fiat, are undergoing a stage of difficulty, whereas many observers, and financial consulting companies in particular, did expect them to have a stage of strong recovery. An exception within this picture is the Renault-Nissan group, that is just the one which was credited with the hardest and most complex task.

On the other hand the highest profitability spot is held by the PSA Group, which in the recent past was criticised for an excessive static attitude linked just to the refusal to pursue a more marked policy of internationalisation. Instead the traits of relative uniformity in the strategies of automakers relate to the forms of division of labour with the supply chain. All main players in the industry are developing further a program of reduction of their manufacturing borders, in order to transfer to first-tier suppliers (which then tend to be more and more indicates as tier 0.5 suppliers) not only the responsibility of development of product and process innovations, but also final assembly activities. Even Toyota, notably the automaker less incline towards this, seems to have adopted more open positions[12]

Clearly such policy is based upon the belief that automakers are capable of maintaining, also in such different sharing of activities and responsibilities, the necessary know-how in order to integrate the contribution of suppliers into a product which is adequate for consumer needs and featuring a brand image which is strong enough to sustain an adequate premium price compared to the policies of direct market entry by component manufacturers. One more time the automotive industry appears due to feature considerable novelties and surprises.

References

Bardou J-P., Chanaron J-J., Fridenson P. [1977], *La révolution automobile*, Albin Michel, Paris.

Bonnafos G., Chanaron J-J., Mautort L. [1983], *L'industrie automobile*, La Découverte-Maspero, Paris.

Boyer R., Charron E., Jürgens U., Tolliday S. [1998], *Between Imitation and Innovation – The Transfer and Hybridization of Productive Models in the International Automotive Industry*, Oxford University Press, Oxford.

Boyer R., Freyssenet M. [2000], *Les modèles productifs*, La Découverte-Maspero, Paris.

Camuffo A., Volpato G. [1997], *Nuove forme di integrazione operativa: Il caso della componentistica automobilistica*, F.Angeli, Milan.

Carillo J., Lung Y., Van Tulder R. (eds.) [2002], *Cars … Carrier of Regionalism*, (forthcoming).

Chanaron J-J, Lung Y. [1995], *Économie de l'automobile*, La Découverte-Maspero, Paris.Freyssenet M., Mair A., Shimizu K., Volpato G. [1998], *One Best Way? Trajectories and Industrial Models of the World,s Automobile Producers*, Oxford University Press, Oxford.

Freyssenet M., Lung Y., [2002], Multinational Car Firms Regional Strategies, in Carillo J., Lung Y., Van Tulder R. (eds.), *Cars ∑ Carrier of Regionalism*, (forthcoming).

Humphrey J., Lecler Y., Salerno S. (eds.) [2000], *Global Strategies and Local Realities. The Auto Industry in Emerging Market*, Macmillan, London.

Laux J.M. [1992], *The European Automobile Industry*, Twayne Publishers, New York.

Lung Y., Chanaron J-J., Fujimoto T., Raff D. (eds.) [1999], *Coping with Variety Flexible Productive Systems for Product Variety in the Auto Industry*, Athenaeum Press, Gateshead.

Porter M.E. (ed.) [1986], Competition in Global Industries, Harvard Business School Press, Boston.

Sako M., Warburton M. [1999], *Modularization and Outsourcing Project*, IMVP Annual Forum, MIT, Boston, 6-7 October.

Shimizu, K. [1999], *Le toyotisme*, La Découverte-Maspero, Paris.

Volpato G. [1983], *L'industria automobilistica internazionale*, Cedam, Padova.

Volpato G., Stocchetti A. [2000], *Managing Information Flows in Supplier-Customer Relationships: Issues, Methods and Emerging Problems*, GERPISA - 8TH International Colloquium, Paris.

10. The original instability appears mainly generated by the fact that the development of the motorisation process for the Newly Industrialized Countries (NICs) is still insufficient to fully utilise the excess of production capacity accumulated by all automakers.

11. On the singularity of "productive models " pursued by the various automobile companies and on the links between their "profit strategies" see the analysis in Boyer and Freyssenet [2000].

12. On Toyota's trajectory and its recent changes see in particular Shimizu [1999].

SPECIFICITE EUROPEENNE, PRESENCE DES ACTEURS AMERICAINS ET NOUVELLE REGLEMENTATION DANS LA DISTRIBUTION AUTOMOBILE

Bernard Jullien

La presse économique européenne a souvent pris appui en matière de distribution automobile comme ailleurs sur un prétendu modèle américain réputé libéral et moderne. De manière surprenante, on a ainsi vu ce phantasme surgir lors du débat sur l'exemption, la presse évoquant la possibilité que les supermarchés puissent « comme aux Etats-Unis » vendre des voitures neuves. Dans le même temps, aux Etats-Unis, la presse spécialisée évoquait le débat européen ainsi : « If it weren't such a nightmare for the auto industry in Europe, you might think it was laughable but it isn't. There is a real fear that the EC will disband the franchise system entirely. »[1] Et l'éditorialiste de *Automotive News* de conclure comme pour signifier que nulle part dans le monde les constructeurs et leurs réseaux n'ont eu à subir une telle dérégulation : "And it just shows that maybe relationships in the United States aren't that bad after all".

Paradoxalement, un tel jugement n'est pas étranger au fait que la présence des acteurs américains dans le paysage de la distribution et des services automobiles est bien une tendance forte au début des années 2000. Ainsi, par exemple, en février 2002, on apprenait que le groupe de distribution américain UAG (UnitedAuto Group), rachetait pour 155 millions de dollars le groupe anglais Sytner Group PLC, propriétaire de 40 contrats de concession. Le chairman de UAG déclarait à cette occasion : « We want the Sytner team to focus on the U.K., but their expertise will be called upon as we look for the opportunities on the Continent.[2]. De même, dès 2000, le groupe de vente automobile via l'Internet, Autobytel, avait lancé depuis le Royaume Uni ses opérations européennes rapidement étendues au continent. Dans la même période, General Electric Capital poursuivait son expansion dans le crédit, le leasing et la location automobile en Europe, le géant du « re-marketing », Mannheim Auctions, s'implantait et les deux grands équipementiers américains, Visteon et, surtout, Delphi, annonçaient des plans de développements en Europe sur les marchés de l'après-vente. Bien évidemment, selon les métiers, les logiques d'internationalisation diffèrent assez largement, néanmoins, même si ce fût dans certains cas l'objectif initial, les entreprises américaines en Europe y exploitent la plupart du temps des opportunités qui n'existent pas aux Etats-Unis bien plus qu'ils ne viennent en Europe appliquer des business models dont ils se seraient assurés la pleine maîtrise sur le plan domestique. Les évolutions réglementaires qui se feront jour à partir de 2002 en Europe renforceront, selon toute vraisemblance, cette tendance. Le cas de UAG dont la décision d'implantation en Europe a correspondu à la publication des derniers projets de réglementation par la Commission Européenne de la Concurrence illustre cette tendance. Outre les opportunités qu'offrent la configuration anglaise où le fait que les groupes soient côtés permet de prendre en une opération le contrôle d'un grand nombre de franchises, les communiqués de presse indiquent que « the law seems to be on Penske's side ».

1. *Automotive News*, 30/7/2001
2. *Automotive News*, 18/2/2002

EUROPEAN SPECIFICITIES, AMERICAN ACTORS AND THE NEW REGULATIONS CONCERNING CAR DISTRIBUTION

As is the case in many other sectors of activity, the European economic press has often referred to the American system of automobile distribution as a model of free trade and modernism. It has thus been surprisingly common during the exemption debate to read of the possibility that supermarkets will be able to sell new cars "just like in the US". Meanwhile, in the US, the trade press has commented on the current European debate as follows: "If it weren't such a nightmare for the auto industry in Europe, you might think it was laughable but it isn't. There is a real fear that the EC will disband the franchise system entirely"[1] Concluding that "maybe relationships in the United States aren't that bad after all.", this *Automotive News* editorial is typical of the US belief that OEMs and dealers in Europe have everything to gain from preserving the current system.

Over the past few years, the automobile distribution and service sectors in Europe have been marked by the appearance and development of a growing number of American firms. In February 2002, for example, the American distribution group UAG (UnitedAuto Group) acquired the British firm Sytner Group with its 40 dealerships for $155 million. The chairman of UAG declared at that time « We want the Sytner team to focus on the U.K., but their expertise will be called upon as we look for the opportunities on the Continent."[2] Since 2000, the on-line car sales group, Autobytel, has been rapidly expanding its Continental European presence from a British base. During the same period, General Electric Credit has been increasing its activities in the field of credit, leasing and car rental in Europe, the "re-marketing" giant, Mannheim Auctions has set up in Europe and the two large American spare parts suppliers, Visteon and Delphi, have announced plans to develop their European markets for after-sales service. Clearly, depending on the specific activity, the approach taken by US firms to internationalization differs quite significantly among these actors. It is nonetheless generally true that, even though it may not have been what was initially planned, these firms are seeking to exploit opportunities in Europe that do not exist in the US, as opposed to applying successful US business models in a European context. The legal changes to be introduced in 2002 in Europe are likely to reinforce this tendency. UAG is a case in point. This company's decision to enter the European market was taken at the time of the publication of the EU Commission for Competition published its latest proposals concerning the re-regulation of the car distribution market. On top of the opportunities available in the British scenario and the fact that there are quoted firms who can be acquired to access a large number of franchises in one acquisition, press releases point out that "the law seems to be on Penske's side".

1. *Automotive News*, 30/7/2001
2. *Automotive News*, 18/2/2002

Trois arguments sont avancés à l'appui de cette thèse :

- ✓ les possibilités offertes au multimarquisme constituent une opportunité ;
- ✓ le choix à opérer par les constructeurs entre l'exclusivité et la sélectivité les amènera les constructeurs à rechercher le partenariat avec de grands groupes aptes à investir ;
- ✓ la libéralisation des marchés de la pièce et de l'après-vente et la perte de pouvoir des constructeurs en la matière offriront des possibilités nouvelles.

C'est ce dernier aspect qui est certainement en mars 2002, le plus sensible. En effet, la part de l'après-vente traité par les réseaux de marque est encore deux fois plus importante en Europe et il en résulte que le système de vente des véhicules neufs est financièrement beaucoup plus dépendant de l'après-vente et de la vente de pièces de rechange qu'aux Etats-Unis. Tout se passe ainsi comme si les constructeurs automobiles avaient aux Etats-Unis renoncé de fait à une très large partie des clientèles que ni leurs dealers, ni leurs captives, ni, pour l'essentiel, leur départements de vente de pièces ne traitent directement ou indirectement. Tel n'est pas le cas en Europe pour des raisons qui tiennent essentiellement aux structures et aux législations qui prévalent encore en matière de pièces de rechange en raison de la reconnaissance de ce que l'on appelait le « lien naturel » entre la vente et l'après-vente. C'est, progressivement autour de cette question que le débat réglementaire s'est focalisé à Bruxelles au cours de l'année 2001 et ce sont les éléments de remise en cause de ce lien qui vont constituer la principale innovation du texte en vigueur à partir d'octobre 2002.

En effet jusqu'ici, pour environ la moitié des pièces vendues en Europe - dites pièces d'origine – les constructeurs avaient la faculté de les distribuer seuls à travers leurs propres réseaux même si elles avaient été fabriquées pour eux par des équipementiers ce qui était le cas pour plus de la moitié d'entre elles. C'est ce que le texte remet en cause en considérant que vente et après-vente peuvent être distingués et, concernant les pièces, qu'il n'y a pas de raisons d'empêcher les fabricants de les distribuer directement eux-mêmes. S'ajoute à cela, l'obligation faite aux constructeurs de diffuser l'information technique concernant leurs produits aux indépendant.

Lorsqu'il ne s'agissait encore que d'une hypothèse de travail, Louis Schweitzer déclarait à ce sujet à Automotive News[3] : « I'm preoccupied. The parts are where the margins are ». Les éléments précis et fiables sont à ce niveau très difficiles à obtenir néanmoins, à lire les chiffres fournis dans le même article par un dirigeant d'entreprise équipementière, on comprend qu'il soit préoccupé. Selon lui en effet une pièce que l'équipementier fournit au constructeur pour 110 $ est revendu au concessionnaire 250 $ et est facturé au consommateur 500 $. L'interdépendance centrale des systèmes d'utilisation des acheteurs de véhicules neufs et garantis avec ceux des acheteurs de véhicules d'occasion est ainsi faite en Europe au début des années 2000 que même si les seconds font tout au moment où ils ont à réparer leurs

3. *Automotive News*, 22/10/2001

Three arguments are used to support this belief :

- ✓ multi-brand operations constitute a new area of opportunity,
- ✓ the choice open to OEMs between exclusivity and selectivity will oblige them to seek out partnerships with other big firms in a position to make significant investments,
- ✓ the deregulation of spare parts and after-sales service markets and the corresponding loss of power on the part of OEMS also open up new opportunities.

This final element is undoubtedly the most significant at this time. With regard to after-sales service, for example, the market share of the OEM networks in Europe is still twice what it is in the US. As a result, the sales of new cars are effectively subsidized by after-sales service and spare parts to a far larger degree in Europe than is the case in the US. It is as if OEMs had abandoned a large part of the automobile market in the US, made up of car users who do not come into contact with their dealership networks or their financial networks and who are not supplied either directly or indirectly by their spare parts departments. This is not the case in Europe, mainly because of the legislation that is still in place regarding spare parts and that recognizes what is called the "natural link" between sales and after-sales service. Since 2001, this issue has been called into question to an ever increasing degree in the regulatory debate in Brussels and the reconsideration of the significance of this "natural link" will constitute the main innovation to be found in the new legal framework to be introduced in October 2002.

Up until now, OEMs have been in a position to restrict the distribution of approximately half of the spare parts sold in Europe – known as original spare parts – to their own networks, despite the fact that 50 percent of these were actually manufactured for them by other suppliers. The new legal framework proposes to review this situation by accepting that there can be a distinction made between the sale of a vehicle and its servicing. If so, there is no reason not to allow the manufacturer of spare parts to distribute them directly themselves. In addition to this, OEMs will be obliged to divulge technical information concerning their products to independent suppliers.

When the proposed law was still being developed, the CEO of Renault, Louis Schweitzer, was quoted in Automotive News on the subject[3]: "I'm preoccupied. The parts are where the margins are". Although it is difficult to access precise and reliable information on the subject, data given by the head of a spare parts supplier in the same article shows why Louis Schweitzer might be worried. According to the figures given, a spare part that is supplied to the OEM at a price of $110 is sold to the dealer for $250 and to the end consumer for $500. At this point in time in Europe, there is thus a clear interdependence between the usage system of purchasers of new vehicles with guarantees and that of used car owners. The used car owners may do their best to avoid the OEM network when it comes to car repair but there

3. *Automotive News*, 22/10/2001

véhicules pour éviter de s'adresser directement aux réseaux de marque, ils sont, pour toute une gamme d'opérations, conduit à se voir revendre par leur réparateur une pièce acheter dans le réseau et à subventionner ainsi les efforts faits par les constructeurs pour présenter et vendre leurs produits. C'est ce qui conduit le même Louis Schweitzer à affirmer en guise de commentaire du nouveau règlement européen qu'il risque de ne pas faire baisser le prix des véhicules neufs…

remains a large range of products for which they have no choice but to accept the cost of an 'original spare part', no matter who it is that repairs their vehicle. In so doing, they are subsidizing the OEMs current system for presenting and selling their products. It is this phenomenon that leads the aforementioned Louis Schweitzer to claim in his commentary on the new European regulation that it is not, in fact, going to lead to a fall in the price of new cars…

Les nouvelles des firmes – Firms News

WILL FORD FIND PROFIT BY GETTING "BACK TO BASICS"

Karel Williams and Sukhdev Johal

When Jacques Nasser took over as CEO in January 1999, he quickly announced a new vision of Ford as a consumer company (not merely a car company) and promised that sector matrix moves into services would deliver better returns for shareholders. More or less exactly three years later Nasser had been sacked and in January 2002 Bill Ford, the new CEO announced a "revitalization plan" under which the company was getting "back to basics" after a period of "reduced focus on core automotive operations". These dramatic events raise two questions for researchers: first, what does this imply about the sources of profit (from manufacturing and services) for a company like Ford and will the new strategy be any more successful than the old one? .

Part of the problem was that Nasser's talk of profits from a move into services raised expectations which could not be satisfied, as academic and industry researchers observed athye time.. In our 2000 paper to the Gerpisa colloquium we pointed out that Ford had already made the move into finance which the European assemblers were executing in the 90s. But Ford could not easily build or afford to buy new (non finance) service businesses which were large enough and consistently profitable enough to deliver transformed profitability: the fundamental problem here was the weight of turnover arising from its sale of 6 million vehicles each year. Nasser's announcement of a new strategy made him vulnerable because he had promised what the company could not deliver in a world where strategy after financialisation is as much about managing market expectations as delivering results.

But Nasser was also plain unlucky about events. In his last major interview, a week before he was ousted on October 30th, Nasser complained that "what's happening is that people are confusing current events with strategic intent" (Financial Times, 24 October 2001). By this stage, his new strategy had been completely upstaged by dramatic and unexpected events:

- ✓ Rollover accidents involving the best selling Ford Explorer sport utility led finally to more than 250 deaths and 800 injuries in the US. As the litigation began, there were Congressional inquiries into what Ford knew before it acted; and public recrimination between Ford and its tyre supplier (Bridgestone Firestone) who each blamed the other for design and manufacturing faults. In August 2000 Firestone accepted partial responsibility and recalled 6.5 million defective tyres, but the accidents did not stop and in May 2001 Ford decided to spend $3 billion to recall the remaining 13.5 million Firestone tyres. This pushed Ford into loss in the second quarter.
- ✓ After September 11th, GM (which had a relatively strong product line) decided to keep the car market going and increase the pressure on Ford by offering generous incentives, including zero finance, for purchasers of new vehicles. Ford was forced to follow suit at considerable cost so that in the third quarter it registered an increased loss. The share and bond markets reacted badly to more bad news: between April and September Ford's share price was more or less halved to $16 and Moodys downgraded Ford's credit rating so that it became more expensive to borrow for Ford Credit (New York Times, 30 September 2001)

In this context, Nasser's failure to build a coalition of supporters inside the firm sealed his fate. He had not cultivated enough friends in the controlling Ford family which included Bill Ford who was prepared to take on the job of CEO. And he had made enemies in many of the other stakeholder groups, amongst employees, dealers and such like. It was a mistake to press ahead with a GE style management appraisal scheme which threatened established, white middle aged staffers because two successive C grades in appraisal put them at risk of demotion or termination (Wall Street Journal, 2 November 2001). This again ended in litigation.

Some three months after the sacking of Nasser, Bill Ford announced a "revitalization plan" which he had jointly developed with his new COO, Nick Scheele, who had previously managed the European restructuring under which Dagenham assembly plant was closed. Analysts and the press were underwhelmed and sceptical about Bill Ford's promises of a return to profitability by a refocusing on auto operations.

The Wall Street Journal (14 January 2002) drew the analogy with GM: "Ford appears to be in a position similar to GM's in the early 90s, when the number 1 automaker emerged from a period of financial and managerial chaos to discover itself years behind the industry's best in efficiency and product design. It has taken GM a decade of restructuring to pass Ford , though it still trails Toyota and Honda" Why is everybody so sceptical about recovery prospects? Part of the problem is a continuing trickle of bad news since September 2001 which has raised fundamental questions about management control, judgement and capability in operating matters at Ford Motor.

- ✓ The revitalization plan would include a $1 billion charge for writing down the value of Ford's stock of precious metals, principally palladium, used in catalytic converters. Ford's purchasing department had acquired a huge stockpile of precious metals without bothering to hedge in a way which covered the company against a fall in the price of the metal (Wall Street Journal, 6 February 2001) GM pointedly observed that it had no such liability.
- ✓ Ford Credit had been used to push product in the late 90s, so that by 2001 Ford Credit had an unusually high proportion of bad loans and losses arising from returned lease cars where Ford had made unrealistically optimistic assumptions about residual values in order to lower monthly payments and increase sales. Residuals were generally a problem for finance companies who had collectively lost an estimated $13 billion on returned vehicles by 2001 (Mannheim Auctions, 2001 Used Car report). But the cost for Ford was that, just when it needed the profits of finance, Ford Motor had to put $700 million in to strengthen Ford Credit's balance sheet and accept that Ford Credit would contribute no profit in the fourth quarter of 2001
- ✓ Ford faced problems about quality, factory inflexibility, delayed model launches and product gap. At the 2002 Detroit show, when other manufacturers showed prototypes of crossover vehicles (hybrids between sport utilities and estate cars), Ford's Nick Scheele showed a sketch of a Ford crossover which would reach the market after other manufacturers' products (Wall Street Journal, 7 February 2002).

Whatever Jacques Nasser's role in all this, the company's problems are deep seated and far reaching and by early 2002 its reputation for execution had suffered as much damage as Nasser's strategy and its financial results.

Scepticism was further encouraged by doubts about whether Ford would (or could) follow the first rule of corporate restructuring after financialisation and take enough cost out quickly to deliver a turn round. This began before the publication of the revitalization plan, with media speculation about the constraints on Ford's restructuring in an industry where in the US (as in Germany or Japan) organised labour has unusual power. Ford's immediate difficulty was a 5 year contract with the Union of Auto Workers which prevented plant closures in the USA until after September 2003. The UAW was not prepared to give ground and had demonstrated its industrial muscle by fighting long and bitter strikes at Caterpillar, Decatur through the 90s and giving GM a bloody nose in a shorter subsequent strike in Michigan. When the plan was published, it offered 35,000 redundancies and 5 plant closures: this amounted to a 10 % cut in Ford's global workforce and a capacity reduction of around 1 million. But the worker total was obtained by adding all redundancies from January 2001 through to 2004. The 35,000 total included redundancies already announced or completed so that only 17,000 new redundancies were planned (Wall Street Journal, 14 January 2002). As for plant closures, the first assembly plant closure was scheduled for 2003 in Ontario Canada and the first US assembly plant (Edison, New Jersey) would not close until 2004.

Equally important, the revitalization plan included substantial expenditure on product led recovery. Ford's capital expenditure of $7 billion a year was to be increased as the company planned to spend $20 billion over 5 years on new product and plant flexibility (Business Week, 19 January, 2002). The expense meant this was not a plan for bouncing back into profit in 2002 and much depended on whether Ford could develop and manufacture new product which would maintain volume and margins in an increasingly crowded US market place where the boundaries between product categories are increasingly blurred. The most interesting feature of the plan is its reliance on substantial profits from Premier Automotive Group (ie Jaguar, Land Rover and Volvo) selling Ford platforms with up market grilles.

According to Bill Ford's presentation to analysts on 11 January, PAG would provide around one third of Ford's profits by mid decade. But profits from Bill Ford's development of manufacturing will probably be as elusive as those from Nasser's new service businesses. Premier Automotive is attacking profitable incumbents like BMW and Mercedes who have hitherto benefited from limited and indirect competition and will, most likely reduce incumbent margins without finding substantial profits from Volvo, Range Rover and Jaguar sales. In these executive segments, Ford is a new entrant, like Toyota in full size US pick ups, where everybody concedes more competition will destroy the fat margins which Ford and GM earned on pick ups and sport utes in the 90s.

Ford's strategy may have changed with its chief executive but the motif of fantasy continues. Bill Ford's consolation is that his family owns 40% of the voting rights so his job is not on the line even though more workers must go if the "revitalization plan" does not deliver.

Fait du mois

Jean-Jacques Chanaron

RENFORCER OU FUSIONNER ? ELABORER UNE AUTRE STRATEGIE PRODUIT ? LES DEUX DILEMMES DE RENAULT-NISSAN

Le processus de renforcement de l'alliance entre Renault et Nissan doit être formellement entériné par l'assemblée générale extraordinaire du 28 mars prochain. Mais en matière de gestion, les opérations pratiques vont souvent plus vite que les autorisations légalement exigées. Sans doute sûr de leur acceptation, Renault prend néanmoins le risque de donner l'impression de vouloir délibérément se passer de l'avis des actionnaires ou, à tout le moins, de considérer leur rôle comme secondaire. La montée en puissance de Renault dans capital de Nissan de 36,8% à 44,4% aura été réalisée premier mars pour la coquette somme de 1,86 milliard d'eur par l'exercice au cours prévu de 400 yens (3,45 euros au cou du jour) des 539 millions de bons de souscription d'actio qu'il détenait depuis l'accord initial de 1999. C'est une bel affaire, du moins mesurée en plus-value potentielle, puisq le titre Nissan s'échangeait à 873 yens en clôture de la séanc du 28 février à la bourse de Tokyo. Tout se passe donc comme si, d'une part, Renault avait besoin de montrer aux analystes et au grand public que tout va bien quant à sa santé financière puisque le groupe peut, sans trop de difficultés, mobiliser une telle somme, et, d'autre part, Renault était bien dans une situation stratégique favorable lui permettant de prendre l'initiative et de démontrer ainsi qu'il a bien la capacité de mener une stratégie de « grand » de l'automobile mondiale. Comme bien souvent dans l'industrie automobile française, Renault se doit, en effet, de se positionner vis-à-vis de son éternel rival du secteur privé, PSA, dont la santé florissante est saluée régulièrement par les grands médias. J.M. Folz a été nommé manager de l'année 2001 et les résultats financiers – la rentabilité et l'endettement – et physiques – les volumes de production et de ventes exprimés en nombre de véhicules ou en parts de marchés – du groupe PSA sont supérieurs à ceux de Renault.

Renault ne peut donc pas se permettre de laisser l'hypothèse d'un management moins efficient voire défaillant se développer dans les médias et monter en crédibilité. Or, tout oppose Renault et PSA en matière de stratégie de croissance externe et d'alliances, fusions et acquisitions. Renault a opté radicalement pour la croissance externe – Nissan, Sanggyong, Dacia – tandis que PSA continue à prôner les accords ponctuels tous azimuts – Renault, Fiat, Toyota, Ford, etc. – . Renault doit donc communiquer sur la viabilité de son option stratégique et faire entériner, notamment par l'Etat français, qui reste toujours son actionnaire majoritaire, l'entrée de Nissan dans son propre capital à hauteur de 15 % d'ici fin juin 2002 par le biais d'une augmentation de capital qui aura pour effet immédiat de diluer mécaniquement la part de l'Etat français de 44,2 % à 37,6 %.

On sait que, pour l'instant, Renault et Nissan ont écarté toute idée de fusion pour opter pour une autonomie opérationnelle totale avec une structure pour les projets communs. Les vicissitudes de DaimlerChrysler sont sans doute pour beaucoup dans cette extrême prudence. Mais cette position peut-elle être tenable à long terme si le nombre de projets communs devient supérieur au nombre de projets autonomes ? Est-elle tenable si une grave contraction de marche vient imposer des plans de restructuration drastiques ? Est-elle tenable lorsque des changements de dirigeants pourront amener des changements de style de management ?

L'autre dilemme de Renault-Nissan est évidemment la politique commerciale. Et comme pour la politique d'organisation industrielle, l'opposition avec PSA saute aux yeux. D'un côté, PSA applique une stratégie de gamme de produits efficaces dans le classicisme du style, la sécurité et la qualité . De l'autre, Renault se veut l'innovateur, qui développe de nouveaux concepts, fort de son image créée avec les monospaces depuis l'Espace et la Scenic. C'est évidemment le marché qui tranche dans cette forme « automobile » de la guerre des anciens et des modernes. Et pour l'instant, il donne raison aux tenants du traditionalisme automobile. Les modèles de haut de gamme de Renault sont pour le moins surprenants alors que Peugeot, et bientôt Citroën, s'alignent sur les critères de style des leaders allemands du segment, Audi, BMW et Mercedes Benz.

Voir les parts de marché en volume s'éroder même très doucement est jouable à court terme lorsque les marchés sont globalement porteurs. Mais ce n'est plus tenable en cas de retournement significatif de tendance, sauf à imaginer une grande flexibilité des facteurs – capital et travail – dont tout un chacun sait que ce n'est guère possible dans le contexte européen, français en particulier.

Renault est coutumier des changements de stratégie sous la pression des faits. Il n'y a donc aucune raison d'être pessimiste. La seule question qui reste en suspens est celle des hommes en place. Auront-ils les ressources nécessaires pour affronter un dossier de l'ampleur de celui qu'ils viennent de gérer avec un succès remarquable, s'allier avec plus gros qu'eux et réussir le pari insensé de rétablir la rentabilité de l'ensemble, et sa crédibilité, en un temps record ? Et, le comble, à la grande surprise des observateurs les mieux informés qui, il y a deux ans, ne pariaient pas cher sur la longévité du mariage

L'actualité du produit

Christian Mory

POLO COMME… MARCO POLO

La Polo a longtemps joué un rôle ingrat dans la gamme Volkswagen. La première génération date en fait de 1974 et est née sous le nom de… Audi 50. Introduite dans la gamme Volkswagen en 1975 sous le nom que nous lui connaissons aujourd'hui, elle allait devenir un modèle strictement Volkswagen au début des années quatre-vingt lorsque la marque Audi a été placée exclusivement en haut de gamme, en complément de la marque Volkswagen qui, elle, restait cantonnée aux segments moyens et inférieurs.

En 1981, la famille Polo bénéficiait, non pas d'une cure de jouvence, mais d'un élargissement avec une carrosserie à hayon vertical qui venait s'ajouter au modèle d'origine et à son dérivé tricorps, la Derby. Cette Polo 1 n'a jamais réalisé des volumes de ventes très conséquents, surtout si on les compare à ceux de la Golf, et les dirigeants de Wolfsburg se sont, semble-t-il, ingéniés à lui donner un cycle de vie très long (de 1974 à 1994), pensant sans doute que les marges sur les petites voitures étaient trop limitées pour que l'on puisse se permettre de renouveler le modèle trop souvent ou estimant peut-être que cette partie du marché pouvait être abandonnée aux marques latines. Finalement, le modèle n'a jamais inquiété la concurrence et c'est Opel qui a écrémé le segment en Allemagne avec sa Corsa. Il a fallu attendre 1994 pour que Volkswagen se réveille et mette sur le marché une Polo 2, très bien conçue et dont on a pensé qu'elle pourrait jouer sur le segment inférieur un rôle assez voisin de celui de la Golf sur le segment des voitures moyennes. D'ailleurs, cette Polo était présentée comme un « concentré de Golf » et exprimait, au moins par son style, la force et le sérieux dégagés par sa sœur aînée.

Malheureusement, Volkswagen allait commettre quelques erreurs. D'abord, il lançait chez Seat une famille d'Ibiza et de Cordoba, qui reprenaient un trop grand nombre d'éléments communs (la plate-forme, bien sûr, mais aussi la planche de bord !), famille qui se présentait avec une image plus gaie et plus dynamique (sans oublier la confusion de marques puisque la Polo Classic n'est autre qu'une Cordoba). Ensuite, il lançait en 1998 une Lupo (et sa jumelle, la Seat Arosa), bâtie sur la même plate-forme, avec à peu près le même fond de clientèle et une image un peu plus technique (la version ne consommant que 3 l aux 100 km). Et puis les concurrents traditionnels ont renouvelé à leur tour leur offre (à l'exception notable de Ford) et mettaient un terme à la menace représentée par la Polo. Enfin, quelques nouveaux arrivants pointaient leur nez sur cette partie du marché, la rendant encore plus encombrée, on pourrait citer à cet égard Toyota avec la Yaris et… Skoda avec la Fabia (la Polo 3 reprend, deux ans plus tard, la plate-forme de la Fabia).

C'est donc avec intérêt qu'il va falloir suivre le démarrage de la Polo de troisième génération. Celle-ci arrive à un moment où Volkswagen opère une montée en gamme (confirmation du rôle important joué par la Passat et avènement prochain de la Phaéton et du tout terrain Mac) qui constitue pour la marque un enjeu beaucoup plus important qu'une bataille sur le segment inférieur. D'ailleurs, le groupe Volkswagen, comme s'il ne croyait pas beaucoup à l'avenir de la « petite fourmi » sort en même temps qu'elle la troisième génération d'Ibiza qui partage la même plate-forme, lui ôtant ainsi toute exclusivité, technique ou commerciale.

Mais le rôle de la Polo n'est pas forcément là où on l'attend. En effet, la petite Volkswagen va être produite en Chine où on attend d'elle de jouer le rôle symbolique qu'avait joué la Ford T pour la motorisation des Américains. Elle aura à la fois un rôle offensif, avec la conquête d'un marché dont on ne cesse d'annoncer le décollage. Petite voiture compacte mais habitable, elle devrait satisfaire les divers besoins d'automobilistes qui commencent à disposer d'un réel réseau routier. Mais avec l'entrée de la Chine dans l'OMC et la baisse drastique des tarifs douaniers qui l'accompagne et donc l'afflux de voitures importées, notamment de Corée et de Chine, la Polo aura aussi pour mission de défendre les importantes positions de Volkswagen en Chine.

Voiture moderne et polyvalente elle devrait prendre le relais d'une Jetta dépassée et mal armée pour affronter d'autres concurrentes locales comme la Buick Sail (Opel Corsa) produite à Shanghai ou la Xiali (Toyota Yaris) produite à Tianjin. Enfin, la Polo chinoise devrait être exportée vers les pays émergents à l'image de la Fiat Palio produite au Brésil (la Polo 3 sera également produite dans ce pays).

Volkswagen semble donc avoir limité les risques de cannibalisation en Europe (avec la Lupo et les produits Seat ou Skoda) en attribuant un rôle de « voiture mondiale » à sa Polo 3. Finalement, l'enjeu de cette Polo ne se situe peut-être pas en Occident mais en Orient.

Une année d'un constructeur

Kémal Bécirspahic dit Bécir

AVTOVAZ (LADA)

(réalisé grâce à la *Revue quotidienne de presse* du CCFA)

La presse du 28 juin 2001 annonce que General Motors, Avtovaz et la BERD ont signé un accord en vue d'établir une société conjointe qui produira un nouveau tout terrain Niva. Le projet représente un investissement total de 332 millions de dollars, auquel les deux constructeurs contribueront respectivement à hauteur de 100 millions de dollars. La BERD apportera les 132 milluions restants sous forme d'investissement (40 millions) et de prêts (92 millions). General Motors et Avtovaz détiendront chacun une participation de 41,5 % dans la société conjointe, et la BERD une participation de 17 %.

Avtovaz a produit 765 000 voitures en 2001, soit une hausse de 8,5 %. Le groupe, qui a notamment bénéficié de l'augmentation des revenus de la population russe depuis l'an dernier, contrôle plus de 45 % du marché local, contre 8 % pour GAZ, son principal concurrent

ZAO General Motors Avtovaz démarrera en septembre 2002 la fabrication du Chevy Niva sur une nouvelle ligne d'assemblage dans l'usine d'Avtovaz. La production devrait atteindre 75 000 unités par an en 2003 et l'entreprise devrait être rentable en 2006. Lourdement endetté et déficitaire depuis des années, Avtovaz cherche par ailleurs un investisseur stratégique susceptible d'assurer sa modernisation et son développement. Il s'est dit prêt à céder 50 % de son capital afin de lever 500 millions de dollars. L'entreprise a accru sa production de 6 % en 2000, à 705 000 voitures.

Au Salon de Moscou, qui s'est tenu fin août 2001, outre la nouvelle Lada Calina (qui devrait apparaître dans trois ans si la situation financière de l'entreprise, encore au bord de la faillite, le permet) et le petit véhicule Mischka parrainé par le parti du président Poutine (du nom de l'ours emblématique de la Russie et du parti de M. Poutine, dont la *Handelsblatt* précise qu'elle ressemble davantage à un tracteur qu'à une voiture), *Automobil Revue* du 4 octobre a relevé la nouvelle Lada 2123 Niva, portant le logo de Chevrolet, dont la production doit démarrer à l'automne 2002, et le Altkam Stalker, véhicule à pneus géants capable de flotter, destiné aux compagnies pétrolières et gazières et doté d'un moteur Lada de 1,5 l et 75 ch.

Automotive News du 10 septembre cite M. Hermann, responsable de General Motors Russie, que le nouveau tout terrain Niva - que General Motors produira conjointement en Russie avec Avtovaz - pourrait être commercialisé en Europe de l'Ouest sous la marque Daewoo si le groupe américain rachète le constructeur coréen. Une autre possibilité consisterait à relancer le réseau et la marque Lada en Europe de l'Ouest. M. Hermann exclut de proposer le tout terrain sous les marques Opel ou Chevrolet, mais Fiat, qui a récemment renoncé au projet de produire un petit tout terrain basé sur Mitsubishi Pajero/Shogun Pinin, pourrait éventuellement le distribuer. General Motors et Avtovaz prévoient de produire 75 000 Niva par an d'ici à 2004, dont la moitié pour l'exportation. *"La Russie attire de nouveau les investisseurs étrangers"*, écrit la presse en octobre. Fiat et GAZ ont décidé de reprendre leurs négociations, Ford commencera à produire des Focus près de Saint-Pétersbourg en 2002, Volkswagen vient d'annoncer son intention de construire une usine de voitures d'une capacité de 300 000 unités par an en Russie.

Il sole 24 ore du 4 octobre souligne l'intérêt que portent de nouveau les constructeurs étrangers à la Russie pour y établir des bases de production. Les analystes estiment que, après la crise financière de 1998 qui a durement frappé le secteur automobile local, le marché russe offre à nouveau un potentiel très intéressant.

Ils estiment que les ventes de voitures dans le pays pourraient atteindre 1,5 million d'unités par an à l'horizon 2005. Inquiets du net renforcement de la présence des firmes occidentales, japonaises et sud-corréennes en Russie depuis 2000, et de l'intégration prochaine du pays dans l'OMC, les constructeurs russes font pression sur le gouvernement pour qu'il conserve certaines mesures de protection.

La *Gaceta de los negocios* indique, début février 2002, que M. Alexei Nikolaiev, président d'Avtovaz, a démissionné de ses fonctions, ainsi que M. Nikolai Latchenkov, son directeur général adjoint. M. Nikolaiev sera remplacé par M. Vitaly Viltchik, actuel responsable de la stratégie de développement du groupe, tandis que M. Latchenkov sera remplacé par M. Iouri Stepanov, actuel vice-président.

La *Tribune* du 4 janvier 2002 écrit qu'Avtovaz a produit 765 000 voitures en 2001, soit une hausse de 8,5 %. Le groupe, qui a notamment bénéficié de l'augmentation des revenus de la population russe depuis l'an dernier, contrôle plus de 45 % du marché local, contre 8 % pour GAZ, son principal concurrent.

Le *Journal de l'automobile* du 14 décembre 2001 annonce qu'Avtovaz prévoit d'enregistrer un bénéfice net de 235 millions de dollars en 2001, contre une perte de 15 millions en 2000.

D'après *Automobil Revue* du 7 février 2002, Avtovaz a cessé la production de la Lada 2106, qui avait démarré il y a près de vingt-six ans. Quelque 4,175 millions d'unités ont été produites. Le modèle est fabriqué, depuis juillet 2001, par Ijmach-Auto ; 45 000 unités doivent sortir des lignes cette année.

Colloque

VERS UNE RECONFIGURATION DE LA FILIERE AUTOMOBILE ?

Séminaire 4 de l'Étude Irepp-Predit
Le 11 avril 2002 de 17 h 00 a 19 h 00

Avec la participation de :
M. Jullien (Université Montesquieu de Bordeaux)
M. Bannel (PDG de Caradisiac)
Un représentant d'un constructeur automobile

Le groupe de recherche Predit-Irepp organise un séminaire intitulé « Vers une reconfiguration de la filière automobile ?» qui se déroulera le jeudi 11 avril de 17 heures à 19 heures à la C.C.I, 27 avenue de Friedland, 75008 PARIS.

Ce séminaire s'intègre dans une étude commandée par une cellule de recherche du **Ministère du Transport**, dont l'axe d'analyse se focalise sur « le commerce électronique et la logistique ».
Aujourd'hui la filière automobile semble confrontée à des limites structurelles qui sont la conséquence même de son organisation et des nouvelles exigences des consommateurs. Dans le cadre de ce séminaire, deux objets d'analyse se dessinent sous l'impulsion d'une plus grande prise en compte des souhaits du « client final » :

- ✓ une reconfiguration des structures de distribution avec l'apparition de nouveaux entrants (les « pures players ») et la fin du règlement d'exemption
- ✓ Le passage d'un processus de production séquentiel et synchrone à une organisation en réseau avec le développement de la place de marché Covisint et des achats en ligne

Membres du Groupe de Travail : *Alain Rallet, Paul Soriano, Jean-Rémi Gratadour, Sébastien Tran, Fabrice Rochelandet, Sylvie Bazin*

Inscription gratuite :
Par telephone a l'irepp 01 44 10 50 60
Par fax a l'irepp au : 01 44 10 50 69

Par e-mail à l'adresse : predit@irepp.com

Lieu du séminaire :
Cci de paris
27, avenue de friedland
75008 paris

Informations :
Jean-rémi gratadour
Irepp – institut de recherche et de prospective postale
18-20 rue edouard jacques
75014 paris
Tél. : 01 44 10 50 60
Fax : 01 44 10 50 69
E-mail : gratadour@irepp.com

CALL FOR PAPERS
International Journal of Automotive Technology and Management (IJATM)

Special Issue on "Integration and Co-operation Tools for World-Wide Manufacturing"

Aims and Scope

Manufacturing has always reflected the continuous evolution of the demand for mobility of human beings and vice versa, as witnessed by the history of Womack et al's "industry of industries'.

New *turbulence* factors are now effecting the calm waters of the past, with enterprises in the automotive sector sailing into heavy seas. The two main factors are i) the complex process of globalisation of markets, consisting of several fragmented parts with highly educated and demanding customers and ii) the stronger trend toward world-wide sustainability of manufacturing actions.

The uncertainty of operating conditions and the unpredictability of future scenarios, with an ever-shortening time horizon, now seem to be the norm.

As a consequence of this, enterprises are constantly required to change their manufacturing strategies, or even their structure, in order to hold the course toward their destination. Improving their manufacturing capabilities to adapt to dynamic transformations of the operating environment is critical.

Most of the research so far carried out on this subject borrows from well-proven natural survival strategies. Accordingly, the distribution of manufacturing activities in terms of time, space and/or competences would seem to be a valuable approach.

New robust and effective tools are thus needed to cope with these centrifugal trends, while assuring coherent management of all manufacturing activities across the product life-cycle to meet customers' requirements.

This special issue focuses on the most advanced research achievements concerning tools and methods for supporting integration among manufacturing activities and/or co-operation within resources. The aims is to provide an on-hand reference for enterprises working for or operating in the automotive sector.

Subject coverage

Papers concerning *concept, theory or model, and application or realisation* on the following potential topics could be included in this special issue (this is not an exhaustive list):

- ✓ Virtual **X** (manufacturing; enterprises; networks; reality; teamwork; engineering; etc.)
- ✓ CA**X** tools (manufacturing; design; process planning; etc.)
- ✓ Design for **X** (manufacturing; assembly; etc.)
- ✓ **X** Manufacturing system (reconfigurable; agile; network; distributed; digital; extended; etc.)
- ✓ **X** chain models and simulation (process; product; supply; value; etc.)
- ✓ Knowledge management
- ✓ Emergent synthesis methodologies
- ✓ Enterprise resource planning
- ✓ Concurrent engineering
- ✓ Uncertainty (chaos theory; probability calculus; fuzzy set theory; …)
- ✓ Decision support systems
- ✓ Total Quality Management
- ✓ ICT tools and management
- ✓ Life cycle engineering

Contributions

The special issue welcomes both innovative and practical contributions addressing the proposed, or related, topics (see "subject coverage"). Interdisciplinary cultural exchange are very welcome!

Highest priority will be given to contributions presenting quantitative or qualitative methods and tools, surveys, reviews, or case studies directly related to the real application for manufacturing in the automotive sector.

Papers should be preferably based on empirical situations or data, with a rigorous research methodology, comparison with existing literature, accurate presentation and clear reference to bibliographical sources, clear presentation of data and validation.

Due Date

The special issue will be published in December 2002.
Deadlines for abstract submission (see Submission of papers): March 15, 2002
Deadlines for acceptance from guest editor: March 30, 2002
Deadlines for full paper submission (see Submission of papers): May 1, 2002
Deadlines for final revisions: July 30, 2002

Submission of abstracts

Abstract should have maximum 200 words text; times new Roman; 12 pt; reporting title, authors and co-authors; address of the referring author (mail, e-mail, telephones).
Send the manuscript to the guest editor preferably by e-mail (Word for Windows 95 or updated –doc- or, alternatively Portable Document Format – pdf-); otherwise, send 1 copy to the above specified address :

Prof. Ing. Michele DASSISTI
Guest editor IJATM
Politecnico di Bari -Dipartimento di Ingegneria Meccanica e Gestionale - Viale Japigia, 182 - 70126 - BARI - ITALY
Fax. + 39 080 596.2788/.2766
e-mail: m.dassisti@poliba.it

Submission of full Papers

See "notes for intending authors" for preparation (accessible via the Internet URL www.inderscience.com).
Refer to the above specified address for mailing: m.dassisti@poliba.it

Serveur – Website

Carole Assellaou

Les Actes du GERPISA sont enfin disponibles sur le serveur du GERPISA.

URL: www.univ-evry.fr/labos/gerpisa/actes/index.html.fr
www.univ-evry.fr/labos/gerpisa/actes/index.html.en

Les Actes du GERPISA rassemblent par thème un certain nombres d'articles des membres du réseau ainsi que la publication de leur communication lors des rencontres internationales.

Ils sont classées par numéros (n°5 au n°32).

Pour votre information ces documents sont accessibles au format pdf. Si un ou plusieurs papiers vous intéressent cliquez sur son titre et enregistrez le fichier.

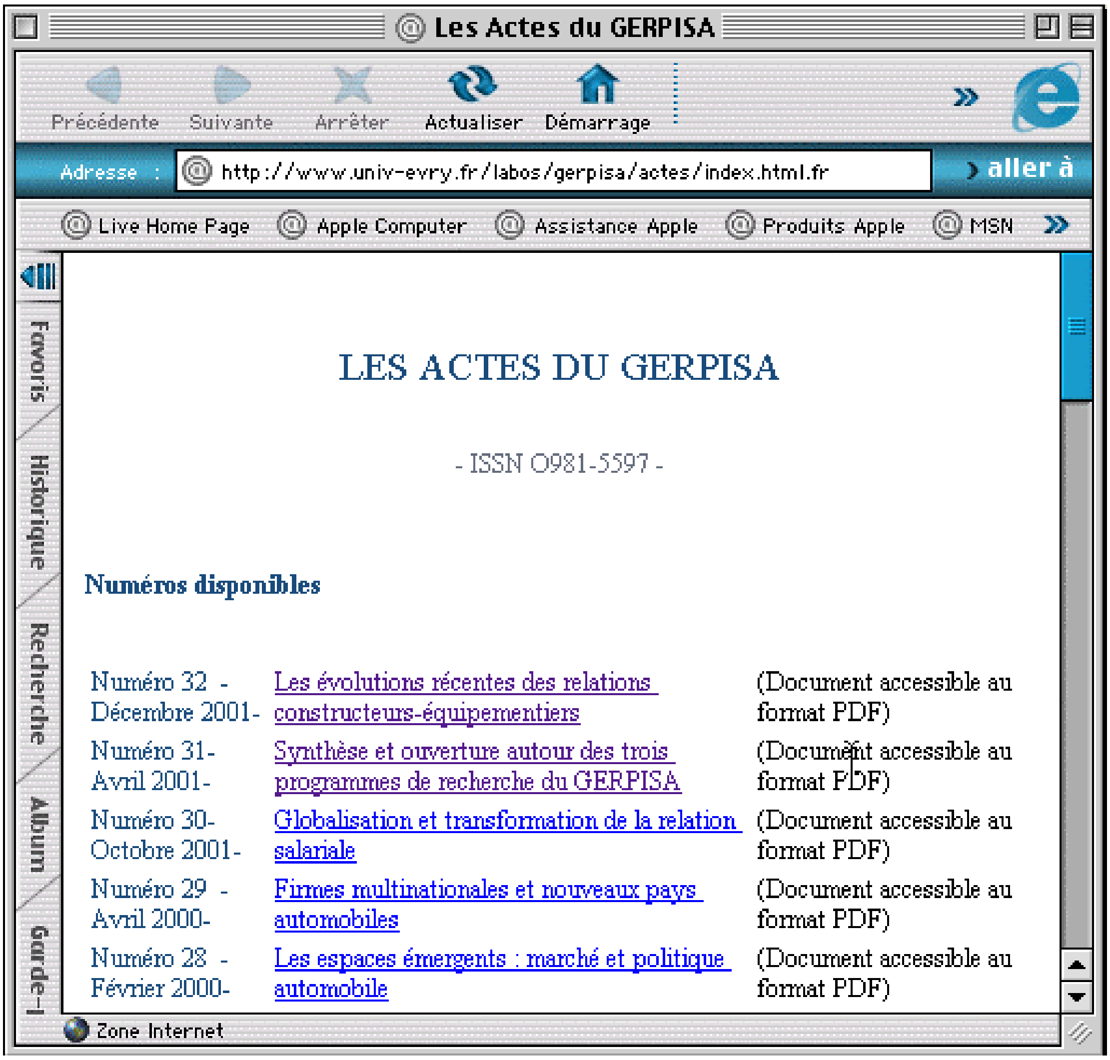
The Actes of GERPISA are presently available on the GERPISA website:

URL: www.univ-evry.fr/labos/gerpisa/rencontre/index.html.fr
www.univ-evry.fr/labos/gerpisa/actes/index.html.en

Les Actes du GERPISA gather together and by themes some articles of network members and their communications in international colloquiums.

They are presented following the numbers (n°5 to n°32).

You can download the papers (in .pdf formate) and print them.



CALENDRIER DES RÉUNIONS DU RÉSEAU 2002

Journée de travail
Paris (France), 15 mars 2002

Mary O'Sullivan (INSEAD, Fontainebleau)
"A revolution in European Corporate Governance?"

Workshop CoCKEAS
Paris (France), 12 avril 2002

Journée de travail
Paris (France), 17 mai 2002

Jacques Freyssinet (IRES, Paris)
"Les marchés du travail et la question de l'emploi en Europe"

Comité international de pilotage
Paris (France), 5 juin 2002

10ème Rencontre Internationale du GERPISA
Paris (France), 6-7-8 juin 2002

"Coordinating Competencies and Knowledge in the Auto Industry"

Visite d'usine
(France), 10 juin 2002

LA LETTRE DU GERPISA

Sommaire du n° 158

P.1. Editorial : La 10ème Rencontre Internationale du GERPISA
Yannick Lung
P.2. Débat : Carmakers Internationalisation Strategies : An Overview
Giuseppe Volpato
P.6. Spécificité européenne, présence des acteurs américains et nouvelle réglementation dans la distribution automobile
Bernard Jullien
P.8. Nouvelles des firmes : Will Ford Find Profit by Getting « Back to Basics »
Karel Williams and Sukhdev Johal
P.9. Fait du mois : Renforcer ou fusionner ? Elaborer une autre stratégie produit ? Les deux dilemmes de Renault-Nissan
Jean-Jacques Chanaron
P.10. L'actualité du produit : Polo comme… Marco Polo
Christian Mory
P.11. Une année d'un constructeur : Avtovaz (Lada)
Kémal Bécirspahic dit Bécir
P.12. Colloques
P.14. Serveur
Carole Assellaou
P.15. Calendrier des réunions du réseau 2002
P.16. Sommaire.

E-mail des auteurs

Yannick Lung : yannick.lung@gerpisa.univ-evry.fr
Giuseppe Volpato : volpato@unive.it
Bernard Jullien : jullien@montesquieu.u-bordeaux.fr
Karel Williams and Sukhdev Johal : karel.williams@man.ac.uk
Jean-Jacques Chanaron : chanaron@esc-grenoble.fr
Christian Mory : cmory@ccfa.fr
Kémal Bécirspahic dit Bécir : Kemal.Becirspahic@gerpisa.univ-evry.fr
Carole Assellaou : contact@gerpisa.univ-evry.fr

Supplément : Bibliographie

Direction : Yannick Lung
Rédaction : Kémal Bécirspahic dit Bécir

Collaboration : Carole Assellaou, Kémal Bécirspahic dit Bécir, Jean-Jacques Chanaron, Patrick Fridenson, Sukhdev Johal, Bernard Jullien, Yannick Lung, Christian Mory, Giuseppe Volpato, Karel Williams

Traduction : Alan Sitkin

Mise en page : Carole Assellaou
Mise en page sur Internet : Carole Assellaou

Les manuscrits sont à envoyer avant le 20 du mois
The manuscripts have to be sent before the 20th of the month