Who Drives the Change?
New and Traditional Players in the Global Automotive Sector

26th International Colloquium Of Gerpisa
11-14 JUNE 2018
SAO PAULO / BRAZIL

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Roberto Marx, University of São Paulo
Tommaso Pardi, CNRS-IDHES, GIS-Gerpisa
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The current international programme of research of GERPISA focuses on the new frontiers of the automotive sector intended, literally, as new emerging markets and industries, but also as new technologies, new innovation fields, new applications and regulations. In the last international colloquium in Paris we asked whether the transformations taking place in these new spaces and fields were disruptive or evolutionary as far as their nature and pace were concerned. This year in São Paulo, we would like to focus on the players who are involved in these transformations and their capacity to shape different types of futures and to drive the direction of change.

The complexity of the automotive sector has grown dramatically in the last years. Two worlds are colliding: on the one hand, the traditional world of carmakers, OEMs and car related distribution and services, which is dealing with the electrification and digitalization of cars, the digitalization of production and value chains, the transformations of mobility systems and more constraining environmental and transport regulations; on the other hand, the world of ICT, which is entering the automotive sector in many different ways (Tesla, Uber, Google, Amazon, Cisco, Huawei, etc.) and could change its structure and the very nature of its business. In addition, due to the electrification of cars, battery producers, as well as other companies in the battery and electric engine value chain, are becoming very significant players in the automotive sector.

Between them, local, regional, national and supranational governments are rapidly reshaping mobility systems, innovation systems, environmental and industrial policies in ways that could affect all these players. But the direction of change is also shaped by the roadmaps and technology expectations that shape the actions of many of these actors. Such visions are embodied in artefacts – consultants' reports and analyses, industry advisory reports, technology roadmaps, patents pools, research papers and books, public policies and reports – that are produced by different types of actors who also require our attention.

What are the strategies and business models that these players deploy in order to transform or disrupt the automotive sector? How do they interact with each other through competition, but also through alliances, consortiums, mergers and acquisitions, lobbying and political work and action? Who is driving the change in these fields of innovation: global or local players? Mature or emerging countries? Automotive or ICT companies? Products and technologies or policies and regulations?

The GIS Gerpisa invites social science researchers, representatives of the industry, public policy makers and advisers, union representatives and consultants to debate these crucial questions for the present and the future of the automotive sector at its 26th International Colloquium.
08:30 – 9:00 - Hall FEA-USP
Welcome of participants
Check-in and Reception

09:00 – 09:30
Room: FUNCADI Auditorium
Opening of Conference and Welcome Speech
Dean of USP, Dean of FEA/Poli, Head of Departments, BNDES representative

09:30 - 10:20
Room: FUNCADI Auditorium
Gerpisa Opening Session
Adriana Marotti de Mello (University of São Paulo)
Roberto Marx (University of São Paulo)
Tommaso Pardi (CNRS-IDHES, GIS-Gerpisa)

10:20 – 11:00 - Congregação
Coffee break

11:00 – 12:30
Room: FUNCADI Auditorium
Plenary 1 – Innovation and Motorization Strategies in Emerging Countries
Chair: Tommaso Pardi (CNRS-IDHES, GIS-Gerpisa)
Keynote speakers: Mario Salerno (University of São Paulo), Jorge Carrillo (El Colegio de la Frontera Norte),
Anthony D’Costa (University of Melbourne)

12:30 – 14:00 - Congregação
Lunch

14:00 – 15:30
Parallel sessions

Session nº: 1
Room: E1
Chair: Gaele Lesteven (LVMT, Ecole des Ponts ParisTech),
Virginie Boutueil (LVMT, Ecole des Ponts ParisTech)

Understanding New Vehicle Buyers in the Age of New Mobility
A integrated research framework of the New Mobility for the Sustainable Society
Shared-used Mobility: global generations and service perception

Session nº: 2
Room: E2
Chair: Giuseppe Giulio Calabrese (CNR-Incre)

Dichotomy in the Brazilian Automobile Industry Sustainable discourse
Organizing for incremental and disruptive innovation through ambidexterity: evidences from a case study in the Brazilian automotive industry
The North American Automotive Industry established in Mexico in 2017

Session nº: 3
Room: E3
Chair: Jesús Fernando Lampón Caride (Universidade de Vigo)

Changing integration of North America’s auto industry - evidence from vehicle production and powertrain sourcing
Large MNEs and their GVCs : a theoretical and
empirical approach on the role of intangible capital in the aeronautic and automotive industries
Internationalization and technological learning in Mexican Multinational Enterprises of auto parts sector

Session nº: 4
Room: G1
Chair: Lourdes Alvarez (Universidad Nacional Autónoma de México)
New Trends in Automobile Fuel Analysis Sensors
Production models and strategies: reciprocating and rotary technologies
From Fluid to Transitional Phase of EV Innovation: Reorienting Electric Mobility Research focus on Industrialization Issues

15:30 – 16:00 Congregação
Coffee break
16:00 – 17:30
Parallel sessions

Session nº: 5
Room: E1
Chair: Bruce Belzowski (University of Michigan)
The autonomous vehicle: disrupting business models embedded in the smart city’s revolution
Product-Service System for Autonomous Vehicles: a preliminary typology studies
Towards an extended V model to design, test and validate autonomous vehicles: a dialogue with the philosophy of technology.

Session nº: 6
Room: E2
Chair: Giuseppe Giulio Calabrese (CNR-Incres)
The Innovation System of the Brazilian Automotive Sector: lessons learned from INOVAR-AUTO
Inovar Auto, Rota 2030 – A critical analysis on incentives for Automotive Industry in Brazil
Notes on the Brazilian Inovar-Auto and

Recommendations for a New Automotive Regime (Rota 2030)

Session nº: 7
Room: E3
Chair: Thomas Klier (Federal Reserve Bank of Chicago)
Changes in international production relocation patterns in an uncertainty context: an analysis in the Spanish automobile components sector
The Italian automotive industry between old and new driving forces
Convergences and divergences in the historical experience of the automotive industry in Argentina, Brazil and Mexico

Session nº: 8
Room: G1
Chair: Marc Alochet (Ecole Polytechnique France)
Design of a model of technological assimilation under the approach of industry 4.0 for companies of the automotive industry in the central region of Mexico
Trends in advanced manufacturing innovation policy in Mexico. The automotive consortium CITTA.
Automotive clusters, Industry 4.0 and Mexican High-Tech SMEs

17:30 – 20:00 Congregação
Cocktail
Samba Group (Live Music)
UNIVERSITY OF SÃO PAULO
Tuesday
12th of June, 2018

08:30 – 10:00 - FEA-USP
Parallel sessions

Session nº: 9
Room: E5
Chair: Adriana Marotti de Mello (University of São Paulo)

Ridesharing service and Policy, Role and Means of
Local Governments
Connecting experimental processes and systemic
change: The role of car sharing in a transition towards
sustainable mobility
Electric car-sharing: uncertainty analysis in public
initiatives of urban mobility

Session nº: 10
Room: G7
Chair: Holger Bungsche (Kwansei Gakuin University)

Drivers of Electro Mobility Adoption: a contextual
analysis
Electric vehicle policy in China: recent trajectory and
perspectives
A new player in automotive public policies: the role of
tooling industry on Inovar-Auto

Session nº: 11
Room: G11
Chair: Jesús Fernando Lampón Caride (Universidade
de Vigo)

From “Back in the Race” to “Push to Pass”: PSA
Peugeot-Citroën profit strategies
2. Sacomano Neto, M., do Carmo M. J., Ribeiro E. M.
Corporate control in the automotive sector: owners,
shareholders and the domination of financial resources
Interorganizational Automotive Alliances: An Exploratory
Study with Social Network Analysis

Session nº: 12
Room: G13
Chair: Tommaso Pardi (CNRS-IDHES, Gerpisa)

to the Southern United States
Knowledge-based assessment applied in Brazilian
Toyota plants: employees’ perceptions
3. Tsukada, O., & Ibusuki U. (2018). Can the Toyota
Production System be Implemented Abroad? - A Case
Study of the Brazilian Automobile Industry

10:00 – 11:00 Poli-USP
Coffee break

11:00 – 12:30
Room: Prof. Francisco Romeu Landi Auditorium
Plenary 2 – New technologies, products,
services and business models: how industry
is trying to reinvent itself
Chair: Bruce Belzowski (University of Michigan,
Transportation Research Institute)
Keynote speakers: Takahiro Fujimoto (University of
Tokyo), John Paul MacDuffie (Wharton University of
Pennsylvania), Dan Ioschpe (Sindipeças)

12:30 – 14:00 - Poli-USP
Lunch

Polytechnic School
Eng. Mário Covas Júnior Building
Escola Politécnica - Poli-USP

Address: Av. Prof. Luciano Gualberto, travessa 3, nº 380
Butantã - São Paulo - SP
Tuesday
12th of June, 2018

14:00 – 15:30 - FEA-USP
Parallel sessions

Session nº: 13
Room: G4
Chair: Danielle Attias (Centrale Supélec)

Driver Assistant systems and their importance for older people - An empirical study with people age 50 and older as a basis for the development of new business models

Construction of new transportation system by autonomous mobility: policy focusing on barrier-free by an aging society and economics growth through an increase in inbound tourists

Autonomous cars, from "ownership" to "usage": how autonomous vehicles might corrupt automotive industry's business model

Session nº: 14
Room: G5
Chair: Michael Smitka (Washington and Lee University)

Japanese carmakers in China: how to explain their decline?

Development of Southeast Asian motorcycle industry and contribution of Japanese firms

International Strategy of Traditional Suppliers in the Automotive Industry -A Case Study of a Japanese Forged Part Supplier-

Session nº: 15
Room: G11
Chair: Thomas Klier (Federal Reserve Bank of Chicago)

State – business bargaining, localisation and supply chain development in the South African auto industry

The Brazilian automotive industry at the crossroads: following the global changes or falling behind?

Progress of dies and molds industry and the role of German immigration network in Brazil: Case studies in ABC district in Sal Paulo, Curitiba and Joinville

Session nº: 16
Room: G13
Chair: Martin Krzywdzinski (WZB Berlin)

Emerging insecurities: casual employment relations and institutional dynamics in the Indian and South African auto industries

Skills, training, and payment as key aspects to implement elements of the industry 4.0: a case study in Guanajuato

The potential employment impact of disruptive technologies in the automotive industry value chain: the case of Mexico

15:30 – 16:00 Congregação
Coffee break

16:00 – 17:30
Room: FUNCADI Auditorium
Plenary 3 – Industrial Polices and Innovation Strategies in the Brazilian Automotive Industry
Chair: Adriana Marotti de Mello (University of São Paulo)
Keynote speakers: Ricardo Abreu (Mahle Brazil) e Ana Cristina da Costa (BNDES)
Wednesday
13th of June, 2018

08:30 – 10:00 - FEA-USP
Parallel sessions

Session nº: 17
Room: A1
Chair: Stéphane Heim (Kyoto University)

10 Years after the Financial Crisis. Had New Regulations and Government Initiatives for Ecological Cars Changed the Japanese Automobile Industry and Market?
Transportation and energy policy in Japan: what options matter
Rapid Transformation in the Norway New Car Market and Japanese Car Makers’ Sales Strategy

Session nº: 18
Room: E3
Chair: Giuseppe Giulio Calabrese (CNR-Inres)

Digitalization and Dynamic Capabilities in the Automotive Industry – Measuring discontinuous change abilities of automotive suppliers with a Dynamic Capability Index
Falling behind in digital transformation capabilities? Exploring the implications of digitalization of the automotive value chain for Brazilian players’ role in global innovation networks
Supplier Delocalization: A Threat to Automotive Cybersecurity Knowledge Sharing?

Session nº: 19
Room: G1
Chair: Bruce Belzowski (University of Michigan)

Focusing Electric Mobility Research on Industrialization Issues: A Renault case study
2. Smilka, M. (2018). Tesla - while it is not disrupting the auto industry

Session nº: 20
Room: G7
Chair: Mario Sergio Salerno (University of São Paulo)

Socio-technical transitions of low emission buses: an analysis from multi-level perspective for the case of Brazil
Critical analysis of the mobility measures implemented in the city of São Paulo from 2013 to 2016
Developing sustainable business models in urban mobility: conceptual framework and evidence from Brazilian cases studies

10:00 – 10:30 Congregação
Coffee break

10:30 – 12:00
Room: FUNCADI Auditorium
Plenary 4 – Labor and employment relations:
to what extent technological transitions represented by IoT and industry 4.0 bring changes to the automotive chain?
Chair: Jorge Carillo (El Colegio de la Frontera Norte, Tijuana)
Keynote speakers: Valter Sanches (IndustriALL), Luís Paulo Bresciani (FGV/USCS), Martin Krzywdzinski (WZB Berlin), Tommaso Pardi (head of GERPISA / ENS Cachan)

12:00 – 13:30 - Congregação
Lunch

13:30 – 15:00 - FEA-USP
Parallel sessions

Session nº: 21
Room: A1
Chair: Danielle Attias (Centrale Supélec)

Technological Prospection for Terrestrial Mobility: a technology roadmapping case study
Automated Electric Vehicle Level 4.5
Autonomous Vehicles and the future of terrestrial mobility: a bibliometric and systematic study.

Session nº: 22
Room: E3
Chair: Stéphane Heim (Kyoto University)

Abandoned vehicles problem in Pacific Ocean islands countries
SDGs and BoP3.0 of Automobile Recycling company: Case Study of the 1st SDGs Business Award ecosystem prize winning company in Japan “KaohoSangyo”
Wednesday
13th of June, 2018

Promoting Automotive Industry in Least Developed Countries: A Field Survey in Myanmar

Session nº: 23
Room: G1
Chair: Adriana Marotti de Mello (University of São Paulo)

1. de Marques, M. C., & Consoni F. L. (2018). Electric Mobility Governance in Germany and Lessons for Brazil
Follow the leader? ASEAN members’ policy towards electric vehicles with focus on Thailand

Session nº: 24
Room: G7
Chair: Guillaume Delautre (International Labour Organization)

Favourable context to worker knowledge sharing - Human Resources aspects in Modular Consortium
Optimization of resources in the training of human resources in manual welding for the automotive industry through an intelligent training cell.
The role of labor in Lean Production and Industrie 4.0: Continuities and Differences

15:00 – 15:30 - Congregação

15:30 – 17:00
Room: FUNCADI Auditorium

Plenary 5 – Global cities as new players in the mobility revolution
Chair: Roberto Marx (University of São Paulo)
Keynote speakers: Gaele Lesteven (LVMT, Ecole des Ponts ParisTech), Virginie Boutueil (LVMT, Ecole des Ponts ParisTech)

19:30 – 22:00
Gala Dinner

Rubaiyat Alameda Santos
Alameda Santos, 86 - Cerqueira César, São Paulo - SP, 01311-000
Thursday
14th of June 2018

R&D tour
Scania Factory

Only for those who have registered.

Address: José Odorizzi Avenue, 151
São Bernardo do Campo, SP

7:00 – Exit to Scania (From Golden Tower Hotel)

9:00 – 12:00 – Scania Visit
Lectures: Sustainable Mobility
Industry 4.0 - Smart Factory

12:30 – 14:00 – Lunch

14:00 – Return to Golden Tower Hotel
GIS GERPISA
Groupement d'Intérêt Scientifique
Ecole Normale Supérieure de Cachan

MEFI (Ministère de l'Économie, des Finances et de l'Industrie)
Christophe LEROUGE – Chef du service de l'Industrie à la DGE
Emmanuel CLAUSE – Chargé de mission Innovation/transport

MEDDE (Ministère de l'Ecologie, du Développement Durable et de l'Energie)
Laurent TAPADINHAS – Directeur de la recherche et de l'innovation
Jean-François SANCHEZ – Chef de la Mission transports (CGD/DRI)
Daniel KOPACZEWSKI – Sous-directeur de la sécurité et des émissions à la DGEC

CCFA
Christian PEUGEOT – Président du CCFA
Pierre-Louis DEBAR – Directeur économie, statistiques et transports du CCFA

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Francis BARTHOLOMÉ – Président du CNPA
Xavier HORENT – Délégué Général du CNPA

FIEV
Patrick TOLLAN – Vice-président de la FIEV
Franck FONTANESI – Responsable économie et statistiques de la FIEV

ENS de CACHAN
Pierre-Paul ZALIO – Président de l’Ecole normale supérieure de Paris-Saclay

L'Université de Bordeaux
Vincent FRIGANT – Université de Bordeaux

EHESS
Pierre-Cyrille HAUTCŒUR – Président de l’EHESS
Sebastien LECHEVALIER – EHESS
University of São Paulo

São Paulo Campus Map

São Paulo University City (Cidade Universitária)

- Faculty of Economics, Business Administration and Accounting
  Faculdade de Economia, Administração e Contabilidade - FEA/USP

- Polytechnic School - Eng. Mário Covas Júnior Building
  Escola Politécnica - Poli/USP