THE NEW GAME OF INNOVATION IN THE WORLD AUTOMOTIVE INDUSTRY

How the structuring of new industries and the restructuring of old ones are changing the rules?
ORGANIZATION COMMITTEE
Bernard Jullien, GIS-Gerpisa, ENS de Cachan
Tommaso Pardi, GIS-Gerpisa, IDHES CNRS

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In 2012 Gerpisa launched its 6th international research programme on “the structuring of new automobile industries and the restructuring of old ones”. Its main hypothesis was that these two processes were interlinked and would have crucial consequences for the geopolitical balance of the world automotive industry.

Since 2012 the work conducted and presented at Gerpisa’s annual international colloquiums has confirmed this assumption, but some of the radical changes we expected to take place in product policies (from global models to local heterogeneity) and productive organization (from global platforms to multi-domestic ones) remain to be confirmed. Yet, it is the very organization of innovation activities within the automotive sector that is perhaps undergoing the most radical changes both in its geographical distribution amongst mature and emerging countries, and its division of work between carmakers, OEMs and new players, and between traditional R&D centers within these firms, new R&D subsidiaries and external partners.
Tuesday
9th of June 2015

Factory tour
Renault Flins - ZOE production line

Meeting point at Gare du Nord (95 rue de Maubeuge) at 7:30 am —> departure 8:00 am
**08:00 – 08:45**

**Welcome of participants**

**08:45 - 10:30**

**Room : Amphi Marie-Curie**

**Opening**

PIERRE-PAUL ZALIO – President of the Ecole Normale Supérieure de Cachan

**Plenary session I. Synthesis and results of the “Structuring / Restructuring” international programme**

BERNARD JULLIEN – Ecole Normale Supérieure de Cachan

TOMMASO PARDI – IDHES CNRS

**11:00 – 12:30**

**Parallel sessions**

**Session n°: 1**

Automobilisation of societies, new and used car markets, and business opportunities in the industry

**Room : Amphi Marie-Curie**

Chair : BERNARD JULLIEN, Ecole Normale Supérieure de Cachan

1. KOHEI MISHIMA

Innovation Management to Capture Emerging Market. The case of the motorcycle industry

2. ANTHONY BLACK & TOM MCLENNAN

The Last Frontier: Prospects and Policies for the Automotive Industry in Africa

**Session n°: 2**

New powertrains and new forms of mobilities: global tendencies, politics and markets

**Room : Amphi Tocqueville**

Chair : GIUSEPPE GIULIO CALABRESE, CNR - Ircres

1. GUADALUPE JAIMES, ARTURO LARA & ARTEMIO CHÁVEZ

Invention as a combinatorial process: Evidence from the lithium-ion batteries for alternative energy vehicles

2. MARCOS AMATUCCI & FRANCO ELIANE

Implications of the ICE history to innovation field

3. MARC DIJK

Comparing electric vehicle market innovation patterns of 1895-1920 with 1990-2015

**Session n°: 3**

Industrial policies in American, Asian, and European automotive industries: regionalisation and innovation

**Room : Pavillon des Jardins**

Chair : BRUCE BELZOWSKI, University of Michigan Transportation Research Institute

1. SOLMAZ FILIZ KARABAG & CHRISTIAN BERGGREN

Innovation capability building in emerging economies through joint venture: Case of Turkish automotive industry

2. COREY BRINCKS, THOMAS KLIER & JIM RUBENSTEIN

The changing role of national champions in the evolving geography of Europe’s motor vehicle industry

**12:30 – 14:00**

**Lunch**
14:00 – 15:30
Parallel sessions

Session n°: 4
Carmakers at a crossroads: new product architectures and new productive organizations?
Room: Amphi Marie-Curie
Chair: TOMMASO PARDI, CNRS-_IDHES, GIS-Gerpisa
1. HYUNG JE JO
Front Loading in Product Development Process: Focusing on the Pilot Center at Hyundai Motor
2. YASUHIKO KAWABE
Applying STAMP/STPA to Human Safety System for Four Wheel Drive Power-train and Effectiveness for R & D Investment Saving

Session n°: 5
New powertrains and new forms of mobilities: global tendencies, politics and markets
Room: Amphi Tocqueville
Chair: GIUSEPPE GIULIO CALABRESE, CNRS-Ircres
1. BRUCE BELZOWSKI
Total Cost of Ownership of Diesel vs. Gasoline Vehicles in the US for the 2012-2013 timeframe
2. EDGAR BARASSA & FLÁVIA L. CONSONI
The evolution of electric vehicle in 21 century: patent data as indicators of technological development
3. HIDETADA HIGASHI
Trigger of Diversity? Innovation Pattern of Electric Vehicles and its Impact for the Technical Solutions of Cars

Session n°: 6
Industrial policies in American, Asian, and European automotive industries: regionalisation and innovation
Room: Pavillon des Jardins
Chair: BOLESLAW DOMANSKI, Jagiellonian University
1. ALESSIA AMIGHINI, GIOVANNI BALCET & XAVIER RICHET
FDI and Multinational Networks in the Balkan Region: the Case of the Automotive Industry
2. PETR PAVLINEK
The role of the state in the post-1990 development of the automotive industry in Slovakia

15:30 – 16:00
Coffee break

16:00 – 17:30
Parallel sessions

Session n°: 7
Carmakers at a crossroads: new product architectures and new productive organizations?
Room: Amphi Marie-Curie
Chair: TOMMASO PARDI, IDHES CNRS, GIS Gerpisa
1. AKIO TOKUDA & STEPHANE HEIM
How Japanese Automotives Cope with the European Standards in Embedded System?
2. EIKO TOMIYAMA & HIROMI SHIOJI
Hyundai Motor Company’s “Selective Focused Local Adaptation Strategy” and the Product Planning and Development Process: from the Perspective of Global Marketing
3. SHINYA ORIHASHI
Cultivating auto market in third country with oversea subsidiaries

Session n°: 8
New powertrains and new forms of mobilities: global tendencies, politics and markets
Room: Amphi Tocqueville
Chair: GIUSEPPE GIULIO CALABRESE, CNRS-Ircres
1. ARTEMIO CHÁVEZ & ARTURO LARA
Patent thicket, exploration and exploitation in electric vehicles (1976-2012)
2. MARINA FLAMAND
Identifying inventive activities of carmakers in energy storage technologies: evidence from patent analysis
Thursday
11th of June, 2015

08:30 – 09:00
Coffee & late admission

09:00 – 10:30
Parallel sessions

Session n°: 10
Carmakers at a crossroads: new product architectures and new productive organizations?
Room : Amphi Marie Curie
Chair : HOLGER BUNGSCHE, School for International Studies, Kwansei

1. JULIO CASTELLANOS & MARÍA-ANTONIETA GRANADOS
Toyota Motor Corporation; development and growth from the financialization point of view
2. KOICHI SHIMIZU
The Change in the Wage System and its Impact in the Production Management at Toyota: the End of Ohnoism?

Session n°: 11
Fragmentation of supply chains and growth of international/regional transactions
Room : Amphi Tocqueville
Chair : THOMAS KLIER, Federal Reserve Bank of Chicago

1. BERTHA VALLEJO & STEFAN HOESS
Business Models under Changing Markets: The Case Study of Bosch Transmission Technology
2. JUNJIRO SHINTAKU
Real Localization in Overseas Production of Japanese Manufacturers

Session n°: 12
Automobilisation of societies, new and used car markets, and business opportunities in the industry
Room : Pavillon des Jardins
Chair : GERY DEFFONTAINES, ENS de Cachan

1. HIDEKI TANAKA & PHILIPPE BYOSIERE
Differences in Motives for Car Use in Urban and Rural Regions in Japan
2. DENISE LUETHGE, HIDEKI TANAKA, MARCOS AMATUCCI, ALAIN VAS & PHILIPPE BYOSIERE
Global Comparisons in Motives for Car Use between Belgium, Brasil, USA and Japan: Effects of Gender, Urbanization and Cultural factors
3. DENISE LUETHGE & ALAIN VAS
Motives for Car Use among Young Belgian Adults: Are young European drivers different from their US, Brazilian and Japanese peers?

10:30 – 11:00
Coffee break

11:00 – 12:30
Parallel sessions

Session n°: 13
Carmakers at a crossroads: new product architectures and new productive organizations?
Room : Amphi Marie Curie
Chair : BRUCE BELZOWSKI, University of Michigan Transportation Research Institute

1. DHRUBA JYOTI BORAH, SOLMAZ FILIZ KARABAG & CHRISTIAN BERGGREN
Drivers of a successful acquisition: The case of Jaguar Land Rover’s acquisition by Tata
2. HUA WANG
Dynamics of product architecture innovation of Chinese carmakers

Session n°: 14
Fragmentation of supply chains and growth of international/regional transactions
Room : Amphi Tocqueville
Chair : THOMAS KLIER, Federal Reserve Bank of Chicago

1. GIUSEPPE G. CALABRESE
The determinants of firms’ survival during the crisis: evidence from the Italian automotive industry
2. JEAN-FRANÇOIS GREVET
Supply chain and automobile industry, the making-of a future history

Session n°: 15
Carmakers at a crossroads: new product architectures and new productive organizations?
Room : Pavillon des Jardins
Chair : HOLGER BUNGSCHE, School for International Studies, Kwansei

1. MICHAEL J. SMITKA & PETER WARRIAN
Innovation in the Supply Chain: Lessons from the Automotive News PACE Competition
2. TOMMASO PARDI
The conditions for radical innovation in the automotive industry: why large companies still matter

12:30 – 14:00
Lunch
Thursday
11th of June, 2015

14:00 – 15:30

Parallel sessions

**Session n°: 16**
Carmakers at a crossroads: new product architectures and new productive organizations?
Room: **Amphi Marie-Curie**
Chair: JORGE CARRILLO-VIVEROS, El Colegio de la Frontera Norte
1. HOLGER BUNGSCHE
Mazda: A new trajectory after having regained independence from Ford again?
2. ROBERTO VALENZUELA & LOURDES ALVAREZ

**Session n°: 17**
Fragmentation of supply chains and growth of international/regional transactions
Room: **Amphi Tocqueville**
Chair: VINCENT FRIGANT, Université de Bordeaux
1. ANA GARRIZ, DEMIAN PANIGO, VERONICA RAMA & PABLO WAHREN
Foreign direct investment (FDI) location decision determinants in the automotive sector. A quantity approach
2. JORGE CARRILLO & MICHELI, JORDY
Does Innovation goes with Social Inclusion? OEMs & Auto Suppliers in Mexico

**Session n°: 18**
New powertrains and new forms of mobilities: global tendencies, politics and markets
Room: **Pavillon des Jardins**
Chair: BERNARD JULLIEN, Ecole Normale Supérieure de Cachan
1. JEAN-JACQUES CHANARON
Electric car: no future within the free-market economy?
2. CAROLE DONADA
How activism matters for creating the electromobility 2.0 industry?

15:30 – 16:00

Coffee break

16:00 – 17:30

Parallel sessions

**Session n°: 19**
Carmakers at a crossroads: new product architectures and new productive organizations?
Room: **Amphi Marie-Curie**
Chair: LOURDES ALVAREZ, Facultad de Contaduria y Administracion UNAM
1. JESÚS F. LAMPÓN, PABLO CABANELAS & JAVIER GONZÁLEZ-BENITO
The modular platform strategy of automobile manufacturers: The impact in manufacturing network strategic outputs
2. PAULO A MIGUEL CAUCHICK & FABRICIO E. HENRIQUES
A proposal for assessing the level of modularity and design and in production in the development of vehicles with the participation of Brazilian engineering centers

**Session n°: 20**
Fragmentation of supply chains and growth of international/regional transactions
Room: **Amphi Tocqueville**
Chair: VINCENT FRIGANT, Université de Bordeaux
1. TOSHIYUKI BABA
The Comparative Study of International Competitiveness and Interdependence of Automobile Parts in Japan, China and Korea
2. JAEHO LEE
The trajectories of Japanese suppliers’ growth strategies; a case study of a capital Keiretsu supplier and an independent supplier

**Session n°: 21**
New powertrains and new forms of mobilities: global tendencies, politics and markets
Room: **Pavillon des Jardins**
Chair: GERY DEFFONTAINES, ENS de Cachan
1. YURONG CHEN & YANNICK PEREZ
Business Model Design: Lessons Learned from Tesla Motors
2. CHRISTIAN BERGGREN & LARS LINDKVIST
An annual flow of models with reduced emissions - The Volvo DRiVe experience
Friday
12th of June, 2015

08:30 – 09:00
Coffee & late admission

09:00 – 10:30
Parallel sessions

Session no: 22
New powertrains and new forms of mobilities: global tendencies, politics and markets
Room: Amphi Marie Curie
Chair: MARTIN KRZYWDZINSKI, Wissenschaftszentrum Berlin für Sozialforschung
  1. JONATHAN BAINÉE & RICHARD LE GOFF,
The « augmented market » of energy, transports et digital industries: the example of the extended electric mobility operators
  2. KLAUS-PETER BUSS
Information technology-based change in the automotive sector

Session no: 23
Industrial policies in American, Asian, and European automotive industries: regionalisation and innovation
Room: Amphi Tocqueville
Chair: EVLALIA AMYGDALAKI, ENS de Cachan
  1. ROBERTO MARX, ADRIANA MAROTTI DE MELLO, FLAVIA MOTA
A preliminary analysis of “Inovar Auto” Impact on the Brazilian automotive industry R & D activity
  2. RODRIGO MOREM DA COSTA
Automotive Industrial policy and R&D Activities: Evidence from the Brazilian experience in the period 2005-2015

Session no: 24
Automobilisation of societies, new and used car markets, and business opportunities in the industry
Room: Pavillon des Jardins
Chair: BERNARD JULLIEN, Ecole Normale Supérieure de Cachan
  1. PHILIPPE BYOSIERE, HIDEKI TANAKA, HAN YANG, JIAO WANG
Determinants of foregoing drivers license in Japanese Gen Y individuals: Financial, lifestyle and transportation alternatives
  2. MARCOS AMATUCCI, HIDEKI TANAKA & PHILIPPE BYOSIERE
A Social-constructionist Comparative Study of Instrumental, Symbolic and Affective motives of car use in young urban drivers in Sao Paulo and Kyoto
  3. OSAMU TSUKADA & ICHIRO YAMADA
“Is This The Sales Management Innovation in Mature Market?” -The Case of the Dealers of Toyota in Japan-

10:30 – 11:00
Coffee break

11:00 – 12:30
Parallel sessions

Session no: 25
Employment relationships: competencies in transition?
Room: Amphi Marie Curie
Chair: ELSIE CHARRON, CSU CNRS
  1. MARTIN KRZYWDZINSKI & ANTIJE BLÖCKER
Industrie 4.0 - the German debate about old and new manufacturing concepts in the automotive industry
  2. HAJO WEBER & MARTINA WEGGE
Digital Transformation in the Automotive Industry: From General Motors to Local Motors, from Exxon to Google
  3. TOMMASO PARDI
Work is back? The factory of the future in the French automotive sector

Session no: 26
Industrial policies in American, Asian, and European automotive industries: regionalisation and innovation
Room: Amphi Tocqueville
Chair: LOURDES ALVAREZ, Facultad de Contaduria y Administracion UNAM
  1. ALEX V. COVARRUBIAS
Linking alternative mobility and clean energies: Scenarios and condition factors for Mexico to make the transition towards sustainable and intramodal mobilities
  2. FATIH MEHMET ÖZEL & HUW C. DAVIES
Development and Application of an ANFIS based Policy Intervention Evaluation Framework for Electric Vehicle Technology Development

Session no: 27
Automobilisation of societies, new and used car markets, and business opportunities in the industry
Room: Pavillon des Jardins
Chair: CHRISTIAN BERGGREN, Linköping University
  1. FARI, L. G. D. & ANDERSEN, M. M.
The evolution of green patenting activity in automotive sector (1965-2012)
  2. THOMAS M. FOJCIK & HEIKE PROFF
Industry Transformation and the Slowness of Strategic Actions – An Explication of the Contradiction between the Expected Industry Changes and the Current Strategic Behavior of Incumbent Automotive Firms

12:30 – 14:00
Lunch
14:00 – 15:30
Parallel sessions

Session n°: 28
Fragmentation of supply chains and growth of international/regional transactions
Room: Amphi Marie Curie
Chair: JORGE CARRILLO-VIVEROS, El Colegio de la Frontera Norte
1. BOLESLAW DOMANSKI
The position of domestic producers in the automotive supply chains in Poland
2. NADIA BENABEDJIL, NADIA BOUNYA, JEAN-BERNARD LAYAN, YANNICK LUNG & ALAIN PIVETEAU
Renault in Northern Morocco: The emergence of an automobile cluster in Tangier

Session n°: 29
Industrial policies in American, Asian, and European automotive industries: regionalisation and innovation
Room: Amphi Tocqueville
Chair: HUA WANG, KEDGE Business School
1. MICHAEL SMITKA
Industrial Policy in China: Is There Any?
2. LÜTHJE BOY
Hybrid or Twins? Production Models and Modes of Regulation in China’s Automotive Industry

Session n°: 30
New powertrains and new forms of mobilities: global tendencies, politics and markets
Room: Pavillon des Jardins
Chair: CHRISTIAN BERGGREN, Linköping University
1. DAN COFFEY & CAROLE THORNLEY
Two Reasons to Fail? Why conventional market structures and unconventional fossil fuels threaten the low carbon transformation of the auto industry
2. M. BAUMANN, BOAVIDA, N., MONIZ, A., REICHENBACH, M., SCHIPPL, J., ZIMMERMANN, B. & WEIL, M.
Technology transition pathways towards electric mobility: the reconfiguration of stakeholder networks

15:30 – 16:00
Coffee break

16:00 – 18:00
Room: Amphi Marie Curie

Plenary session II. The new game of innovation? Towards the new international programme

Introduction by:
BERNARD JULLIEN, GIS-GERPISA, Ecole Normale Supérieure de Cachan & TOMMASO PARDI, GIS-GERPISA, Ecole Normale Supérieure de Cachan

Keynote speech by:
GUILLAUME DEVAUCHELLE, Valeo Group R&D Director

20:00
Gala Dinner

Restaurant PHARAMOND
24, rue de la Grande Truanderie
75001 Paris
RER Les Halles / Metro Etienne Marcel
GIS GERPISA
Groupement d’Intérêt Scientifique
Ecole Normale Supérieure de Cachan

MEFI (Ministère de l’Economie, 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 DGE

CCFA
Patrick BLAIN – Président du CCFA
Pierre-Louis DEBAR – Directeur économie, statistiques et transports du CCFA

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

FIEV
Arnaud de DAVID-BEAUREGARD – 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 Cachan

L’Université de Bordeaux
Yannick LUNG - Vice-Président Recherche Université de Bordeaux
Vincent FRIGANT – Université de Bordeaux

EHESS
Pierre-Cyrille HAUTCŒUR – Président de l’EHESS
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