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Editorial

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DES ALLIANCES A L'ALLIANCE

L'Alliance avec un grand A, c'est celle de Renault et Nissan. C'est ainsi qu'elle revendique d'être reconnue et force est de reconnaître que cette demande paraît légitime. A la fin des années 90, alors que la globalisation accélérait à la course à la dimension et incitait aux manœuvres stratégiques entre les groupes automobiles, trois accords majeurs ont été conclus au niveau mondial : entre Daimler et Chrysler, entre General Motors et Fiat et entre Renault et Nissan.

Le premier s'est révélé être une absorption du constructeur états-unien par son partenaire allemand, plus que la fusion annoncée. Chrysler en a été largement affecté et DaimlerChrysler peine à tirer profit de ce regroupement, alors que l'avenir de Smart est encore incertain. L'apparente complémentarité entre les deux groupes s'est diluée.

Le second accord est en plein délitement et cette mauvaise piste aura pénalisé chacun des deux partenaires. Après les graves difficultés de Fiat, c'est GM qui annonce des profits en retrait fragilisant le système financier mondial au cours du mois mars. Les problèmes posés par la redondance entre Fiat, Opel voire Suzuki n'ont pu être surmontés.

Quel contraste avec le redressement remarquable de Nissan et la bonne santé financière de Renault. Les deux marques ont tiré pleinement parti de leur complémentarité géographique et sont engagées dans le développement de plates-formes communes pour leurs modèles de fort volume, tout en respectant l'identité et la spécificité de chaque marque.

Sans vouloir être des oiseaux de mauvais augure, on peut cependant se demander si l'Alliance n'a pas « mangé son pain blanc » et s'interroger sur sa capacité à durer. D'une part, l'effort important de rationalisation réalisé chez Nissan, notamment auprès des fournisseurs, avec l'arrivée

FROM ALLIANCES TO THE ALLIANCE

When we talk about an Alliance with a capital A, what we are referring to is the link between Renault and Nissan. At least, this is how the group would like to be known - and there is little reason to begrudge the legitimacy of this wish. In the late 1990s, globalisation's penchant for giganticism accelerated, spurring carmakers into a renewed bout of strategic manœuvring. Three major international-level agreements were signed at this time, between Daimler-Chrysler, General Motors-Fiat and Renault-Nissan.

The first tie-up turned out to be more of an absorption of the US carmaker by its German partner than the announced merger. Chrysler was severely affected by these events, with DaimlerChrysler also struggling to benefit from the new structure. Moreover, the future of the Smart car remains uncertain. The two groups' ostensible complementarity has been diluted.

The second pact has fallen apart and created a dynamic that is harming both partners. Fiat is in a sorry state, and the world financial markets were hit by GM's recent (March) announcement of lower profits. Redundancy problems involving Fiat, Opel and even Suzuki have yet to be resolved.

What a contrast with Nissan's remarkable recovery and Renault's healthy financial situation. These two brands have benefited fully from their geographic complementarity and already started to develop shared platforms for their high volume models – with each partner continuing to respect the other's identity and specificity.

Without being the harbingers of bad news, we do wonder, however, whether the good news about the Alliance isn't already a thing of the past. Questions have been raised about the durability of this structure. On one hand, the major rationalisation efforts that were engaged at Nissan

de Carlos Gohsn et son équipe a permis des résultats immédiats et les problèmes arrivent (Cf. éditorial Lettre n° 182).

Ces opportunités ont été saisies ; elles n'existent donc plus et il sera difficile de rééditer l'exploit. Mobiliser dans la durée n'est pas une chose simple car cela relève d'une dynamique organisationnelle à construire. D'autre part, il faut attendre les réactions des marchés face aux modèles de voitures développés sur des plates-formes communes. Dans le passé, il y a eu déjà de nombreuses désillusions sur des projets qui semblaient pourtant séduisants sur le papier. En dernière instance, ce sont les consommateurs qui valideront la stratégie. Il ne faut donc pas sous-estimer l'ampleur de la difficulté à pérenniser l'Alliance. Il n'y a aucun précédent dans l'histoire de l'industrie automobile, ni dans les autres secteurs à ce niveau. La pérennité suppose d'inventer un nouveau modèle d'entreprise sans se limiter aux qualités remarquables d'un dirigeant providentiel. La double responsabilité que va assumer Carlos Gohsn en dirigeant simultanément Nissan et Renault semble consacrer la figure d'un nouveau type d'entrepreneur. Au delà, pour relever le défi, il faudra prendre en compte d'autres composantes de la dynamique des organisations, ce que le GERPISA appréhende à travers la formation du compromis de gouvernement d'entreprise.

immediately after the arrival of Carlos Ghosn and its team, relating in particular to the firm's suppliers, have already had their positive effects; the negative side is appearing (Cf. Lettre n°182 Editorial). In other words, these opportunities have already been seized, and there is little more to be gained in this respect, i.e., this success will be difficult to repeat. It is hard to remain mobilised over the long run, given the type of organisational dynamic that this necessitates. We are also awaiting the markets' reactions to the cars currently being built on the shared platforms. In the past, many projects that seemed attractive on paper ultimately led to disillusionment. In the end, consumers will be responsible for validating this strategy. In short, we would do well not to underestimate the magnitude of the problems faced in ensuring the Alliance's long-term survival. There is no historical precedent at this level, whether in the automobile industry or any other sector. Long-term survival means inventing a new business model and not just relying on a providential leader. In running both Nissan and Renault, Carlos Ghosn will be assuming a twofold responsibility, thereby embodying what would apppear to be a new type of entrepreneur. At a deeper level, if the challenges awaiting this business are to be overcome, consideration will have to be given to other components of its organisational dynamic, something that GERPISA apprehends through the shaping of a company government compromise.

Questions de recherche – Research questions

Olivier Hirt

BUILDING OUR ANALYTICAL FRAMEWORKS AND RESEARCH AGENDA FOR THE "PRODUCT POLICIES AND PRODUCTIVE ORGANIZATIONS" APPROACH TO SOCIO-ECONOMIC MODELS

The GERPISA 4th research programme - "Variety of capitalism and the diversity of productive models" – and the joint European funded project ESEMK effectively started about eight months ago, after the October 2004 kick-off meeting in Paris, and with the beginning of a first series of meetings and workshops. We will here concentrate on the events that helped building the theoretical approaches and agenda for the part of the programme focusing on firms "product policies and productive organizations".[1]

A point that can be noticed is the co-presence of two types of methodological and theoretical approaches, for analysis at both the micro and the macro level : the ones relating to the identification and characterization of institutional configurations based on stable categories, the others being more oriented toward the understanding and modelling of collective action processes and the shaping of categories – closer to collective action theory. How to combine these two types of approaches is a question that could merit to be looked at, as it relates to the same preoccupations that originated several programmes – among which conventions theory, regulation theory, or some of the institutionalist approaches – that try to overcome certain limits of more common approaches in economics. This question could be addressed as part of the theoretical content of our programme. For the GERPISA, looking at things in such a way may designate two directions on which the programme could contribute to pursue our trajectory : by enriching our conception and modelling of the macro context and its links to productive models, and by helping us specifying our frameworks for looking at collective action and the building of "governance compromises" in a more dynamic way.

Coordination issues : making variety and consistency compatible

Before coming to the approaches and works proposed for the work package 5, we would like to say a few words about the programme's coordination.

Something obvious regarding the approaches proposed by the ones and the others, is the variety of them. This variety is not new in the GERPISA's experience : the GERPISA's network form and multi-disciplinary aspect, the various involvement levels and objectives of the members, explain it. We have to consider that every GERPISA's programme encompasses two kinds of joint processes : the building of collective theoretical and empirical responses to collective issues, and through it the pursuing by each contributor of his individual trajectory, with personal issues, frameworks and results. But this heterogeneity is maybe more striking this time, as several participants are new comers to our

[1]. i.e. ESEMK work package 5.

activities, and as the scopes of the topics to be addressed is obviously wider than in the previous programmes (shift from automotive to other industrial sectors, scope of the issues, etc.)[2]. Hence, we would like to think about possible means of enhancing the coordination and consistency of the project.

- First, we can remain that it was established a symbolic distinction between the formal ESEMK project and the 4th GERPISA programme, the meaning of which being the possibility to have debates and elaborate responses in a more "GERPISA specific" way (coherent with the GERPISA's identity, trajectory and preoccupations), besides the work to be done within ESEMK.[3]

- Secondly, we can consider that we have to let every contributor "speak his own language". Time will come to make efforts for building consistency and sense, coherent with our collective preoccupations and tools (as by now, contributions have mostly consisted in the presentation of theoretical frameworks or declarations of intent, rather than in the presentation of empirical results).

- But – thirdly - this does not mean that coherence will emerge spontaneously. To promote it, we can keep in mind that one principle that have permitted the functioning of the GERPISA's previous programmes is the formulation of *explicit collective questions*. Some have been given in the programme's formulation, but a special attention will have to be paid to reflexivity along the project – to the renewal and re-formulation of issues according to the project progress. In this perspective, the set of different "bricks" encompassed in the programme's formulation (countries socio-economic models analysis at the macro level, firms productive models in various sectors, micro-macro dynamics, institutional change theory, etc.) has to be taken as a grid, to situate every contribution and make the better use of its results, and build linkages between works. Reflexivity is for sure a task for the programme coordinators, but we could also expect efforts in this sense by all of the contributors, to make the debates and results richer and more lively.

The programme, as designed, appears to be fairly ambitious, if we consider what would have to be done to offer a "complete" or systematic answer. On this point, it is clear that the objective is not to try to be exhaustive. It is rather to shape partial elements of answers, but sufficiently coherent together and significant to allow debates with other approaches, and draw basis for further works.

Regarding the GERPISA's own trajectory and stakes, this programme offers us to pursue the work on productive models in automotive industry –especially on the question of the place of the macro level, and by deriving some benefits from inter-sectoral comparisons. It also allows us to approach an issue new to us, the variety of capitalism, using our theoretical tools and empirical knowledge stemmed from the work on auto industry.

An institutionalist approach to industrial sectors and their relation to the macro level

A first series of meetings helped to draw the oulines of the agenda, for the part of the programme approaching socio-economic models and the macro-micro relation through the analysis of firms "product policies and productive organizations" and their dynamics, in different industrial sectors.[4]

The GERPISA seminar January 2005 session has been dedicated to a presentation by B. Jullien and A. Smith of a theoretical framework to be used in work on industrial sectors, and their relations to the macro level.[5]

The starting point of their approach is empirical work focusing on the ways professional organizations, or other institutions at the meso level, manage to play a role in the definition of rules and policies at the macro level.

The first idea is to consider that the *political dimension* is not only situated at the macro level, but present all along the action processes, at the different levels (firms, industrial sectors, regional and national areas, EU and international organizations). Hence, whereas most of the theories in economics and political science tend to restrict "politics" to the macro level, their objective is to set up a framework allowing to address the political dimensions, everywhere where present, within processes that lead to institutional changes.

In this perspective, they propose not to consider "political demands" as given, but on the contrary to study the "politisation processes" by which originally private, local concerns, progressively become public or political issues, requiring a political treatment at the national or European level. This can be made by looking at the forms of "mediation" through which these processes unfold, and with giving a place, notably, to the consideration of domination relationships, battles of wills, and conflicts.

Based on this first approach, they draft two different frameworks : the first for the analysis of sectorial policies ; the second for addressing the firms and industrial sectors productive dynamics. On the first axe, A. Smith roughs out a distinction between two types of "legitimation" processes - by which industrial sectors can make a local issue become a political concern -, either by "politisation" (use of media, public deliberations, explicit reference to

2. Our fall 2004 debates on the combination of GERPISA's and CEPREMAP's ESEMK team approaches, for example, have shown some questions that this heterogeneity can raise up.
3. Next June meetings and colloquium will offer discussion spaces in this sense.
4. According to ESEMK organization, the work is divided into five work packages : state of art and methodology (WP1), socio-economic models analysis at the macro level (WP2), financialisation (WP3), employment relationship and governance compromises (WP4), product policy and productive organization (WP5).
5. Theoretical proposal to be considered as a contribution to the ESEMK WP1 on methodological issues.

values, etc.) or by "technicisation" (sectorial or intersectorial arenas, lobbies, no communication, no reference to values, etc.). On the second axe, B. Jullien aims at building a "holist economical theory of the firm", enriching the common economical conceptions of the firm with new attributes, to better take into consideration the firms relations to their environment (employment, supply, finance and commercial relations), and distinguishing three dimensions for the characterization of any relationship (conflict-coordination, compromise-convention, and cooperation-coercion axes).

These frameworks should be used and refined in Jullien and Smith empirical inquiries to be done within the programme. They will be contributions to our theoretical issues on micro-macro integration and institutional change, based on an understanding of actors roles, and collective action processes.

Frameworks and agenda for the research on public utilities

Before this, the December 2004 session of the GERPISA seminar had been dedicated to the part of the project focusing on *public utilities* (PUs). Together with B2B industries and B2C industries, PUs are one of the three sub-parts of the work to be done on "product policies and productive organizations",[6] each of these three sectors referring to specific modalities regarding the relations of firms to their demand and to the political level, the two dimensions to be our key entries for this part of the project.

The main contributions on PUs are to be brought by N. Behr and G. Leblanc (CERNA, Ecole des Mines de Paris) on the one side, and by A. Isla and C. Baron (LEREPS, University of Toulouse) on the other ; and the presentation by N. Behr and G. Leblanc helped drawing the outlines of their research.

Several factors motivate the interest for a study of PUs in the programme. PUs constitute a strong, central element of the European socio-economic model, benefitting of a shared socio-political vision of objectives within the EU, even if national specificities exist in the implementation forms. Historically, they did correspond in all countries to national specialized monopolies, with price regulation and public service obligations. But since the mid 90's, they have had to face a revolution characterized by their markets liberalisation, shifts from sectors regulations to the general competition policy, technological changes, environmental norms, and the European market integration. And this multi-faceted revolution had taken a variety of forms depending on the sectors. Hence, the main issue to be addressed within the programme will be the one of the forms and diversity of these changes, depending on the sectors and countries. We shall attempt to explain why, despite a strong pressure toward convergence, it does not converge, and also assess the hypothesis of a possibility for the emergence of a specific European model, against the one of an ineluctable adoption of a unique globalized one.

N. Behr and G. Leblanc distinguish three aspects on which PUs can be investigated. One would be in terms of "market failures" (natural monopolies of network industries, etc.). The second one could consider the specific political issues associated to PUs - due to their "political relevance for society" (taxation and redistribution mechanisms, links to socio-economic goals such as economic growth or prices stability). Last, the third axe relates to specificities and constraints regarding the relation to demand, due to the qualification of PUs as "essential goods" (required minimal provision to every individual, low price and income elasticity of demand, access issues, etc.).

Regarding the definition of "public utilities", they remark that PUs does not constitute a homogeneous industrial sector, the denomination rather covering up a set of highly heterogeneous activities. Hence, as a basic distinction, the research should distinguish between two kinds of PUs : network industries characterized by natural monopolies, high sunk costs, etc., on the one side (e.g. gas, electricity, water supply, telecom, postal services rail and air transport) ; and local public utilities –referring to public goods, low rivalry, etc., on the other (e.g. waste collection and treatment, sewerage and water treatment).

Besides this first research, the project proposed by A. Isla and C. Baron relates to a different type of work, closer to the theoretical approach drafted by B. Jullien and A. Smith, as oriented toward the setting up of an "institutionalist economics of regulation".

Paying a particular attention to the PUs forms of productive organization, relation to demand, and relation to the political level, they should focus on the mechanisms by which firms and political institutions at the national or European level, jointly contribute to shape the market, through the regulation processes (standards, competition rules, etc.).

The objectives will be to assess the hypothesises of the existence of national or sectorial coherences, but also to better understand the institutional forms and processes of regulation, at the different levels (international organizations, states, sectors, firms), looking at the characteristics of the different actors (private / public, local / national, etc.) and of the different kinds of contracts (state-owned companies, delegation, etc.).

A specific interest will lie in the examination of the rules definition processes, and application processes, considering that the deployment of a rule is never uniform, but diverse, and that these processes encompass several mechanisms such as retroaction on the definition of the rule, or re-qualification of the common good.

The two parts of inquiries on PUs should address the water supply, energy and waste treatment sectors in France, the UK, Germany and Spain, while comparisons may also be made with the telecommunication sector (deregulation processes, etc.) based on previous work.[7]

[6]. ESEMK work package 5.

[7]. In particular, Elsie Charron's research on France Telecom.

Getting back to our opening consideration, we see that the work on PUs will be made of contributions relating to the two types of approaches : the one by N. Behr and G. Leblanc focusing on institutional configurations, the one by A. Isla and C. Baron being more oriented toward the understanding of collective action processes and their place in institutional change dynamics. The approaches of the CGS (Ecole des Mines de Paris), that they should use in their work on design activities as part of the work package 5 (on firms "product policies and productive organizations"are also close to the second type.

Outlining the CGS contribution to ESEMK : "Design Regimes" as a variable for socio-economic models analysis ?

The purpose of the GERPISA seminar session organized with the CGS (February 2005) was to get more familiar with their works on design activities and innovation, in order to think about the forms and contents of their participation into the programme.Works by the CGS on design activities are not new to the GERPISA, as they've been participating into our activities for several years and were involved in the previous programme.[8]

This research, which started more than ten years ago, led them to come to consider the "design regimes" as a key variable regarding firms organizations, strategies, and relations to their environment. They came to focus especially on "innovative design" regimes, which appear as characterizing the current situations and change dynamics of design activities in numerous firms, facing innovation based competition contexts.

To recount their trajectory, B. Weil presented an ongoing work on the history of the organizational forms of design activities and engineering departments, which leads to show some limits of the current dominant models, the necessity for new ones, and directions for their implementation.

By the second half of the nineteenth century and the beginning of the twentieth, several rationalisation processes generated a shift from an original "wild design" regime (inventor businessman figure, one main product, monopoly, high resources consumption for low expansion), to the "systematic design" one (bigger engineering departments, new actors – among which industrial research, marketing, industrial design -, lineages of products, variety, higher expansion through repetitivity and learning). This "systematic design" model, of which the US railway company Baldwin constitutes an early example, and then largely theorized and developed in Germany as part of German efforts to make up the English industrial take-off, has progressively become a standard (or broadly dominant) model regarding design theory, education, organizations and methods. But according to the CGS, it is now reaching its limits, as numerous firms have to face more intensive innovation rhythms. In the current contexts, characterized by deep and fast changes in consumers values, products identities and technologies, firms have to find new ways for renewing and re-combining competencies in accordance with the new value spaces they explore. This new "innovative design" regime is still calling for its rationalisation forms. It is on these hypothesis and directions that the CGS works today, having identified similar preoccupations and dynamics in different firms, and accompanying them in the exploration of new forms of organization. They develop this programme by working on three axes : design reasoning (shift from decision to design paradigm) ; forms of organization (Design Oriented Organizations (DO2), from R&D to RID (I for innovation), inter-firms Exploratory Partnerships (PE)) ; and innovation economics. Based on these works, they make the hypothesis that these rationalisations could be as deep and important, for design activities, as the taylorist revolution had been for production at the beginning of the twentieth century.

The changes the CGS studies, the hypothesis they formulates and the theoretical frameworks they set up, may offer original tools and directions, for questioning and elaboration, within our programme.

First, they could offer new ways of looking at firms, that we could try to use in our analysis. Maybe these changes could be likely to generate new types of productive models, or to amend or refine the characterization of existing ones. It could also lead us to modify our ways of modelling or characterizing the firm, and to focus more on the productive models emergence or transformation processes, under a more dynamic angle. Answering a question on the possible understanding of these thesis as an announcement of a new "one-best-way", B. Weil insisted on the fact that what the CGS assesses regarding these changes still has to be considered as work hypothesises, that these changes do not inevitably affect all the firms but rather a sufficiently significant number of them, in various areas (automobile, pharmaceutical, home appliances, agro-foods, telecommunications, to mention some of the sectors investigated), to be taken into consideration. He made it clear that the point was not to say that "innovative design" was to replace "systematic design" and the existing organizational forms, but rather to complete them, being more adapted to specific innovation situations. The forms of implementation are still to be determined, and they may for sure be diverse - not uniform - depending on the firms, sectors, or other variables. Secondly, these views are also likely to question our ways of looking at socio-economic models. The potential impacts of various forms of "innovative design" concerning the relationship with the customers and the society could be investigated (e.g. : expanding through innovation within the existing product lineages does not imply the same learning and reconfiguration processes than expanding through variety and the creation of many new lineages). On the theoretical side, these new conceptions may also lead to renew our economical theories of the firm (shift from the firm as a production function to a design function)[9] and the categories we use

[8]. CoCKEAS.

[9]. cf. Le Masson P., 2001, « De la R&D à la RID. Modélisation des fonctions de conception et nouvelles organisations de la R&D », thèse de doctorat de l'Ecole Nationale Supérieure des Mines de Paris en Science de gestion, 467p.

in economical modelling, which is an axe of the CGS programme. Last, we could also remark that, as said, the methodological approaches used by the CGS relate to collective action theories, and outline a theory of change in which institutional change does not arouse of macro level influence on the micro level (or conversely), but does originate in crisis occurring at any level, and liable to generate changes at any or both levels. (For example, as suggested, the shift to innovation based competition, and intensive innovation regimes, may give rise to changes at both the micro and macro levels).

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The distinction we made between configurations analysis oriented approaches, and "collective action processes analysis" oriented ones, and the question of their combination, could be kept as an entry throughout the programme or not. But we do think that the second type of approach, to put it shortly, can help more usual tools in economics by permitting a better apprehension of the dynamic dimension of collective action categories, which underlays the emergence or renewal of the institutions. It restores a place for the capacity of invention of actors in the definition and renewal of efficiency or performance criteria[10] (but also for interests or power relationships, or the possibility of conflicts). The two kinds of approaches and their combination are useful to pursue the GERPISA's questioning and elaboration trajectory on two particular dimensions : enriching our conception of the political level and its place in the productive models theory ; enriching also our modelling of collective action processes, for a better and more dynamic apprehension of the "governance compromises" emergence or renewal at the different levels.

10. An idea which perhaps also lies in the scheme by M.-C. Villeval quoted by B. Jullien and A. Smith (Jullien B. and Smith A., 2005, "Studying the politics of European industry: a political institutionalist approach to economics", presentation at the GERPISA seminar, January 7th 2005).

Débats - Debates

THE BUSINESS HISTORY ON THE GLOBAL AUTOMOTIVE INDUSTRY

After the book review reports of the Nikkei Simbun Paper and the Diamond Weekly (Lettre du Gerpisa n° 181) concerning the Koichi Shimokawa's recent publication "The Business History on the Global Automotive Industry" (published by Yuhikaku Press, Tokyo, 2004), here are the preface and the contents of this book that provides an historical analysis of the Global Automotive industry during the last quarter of the 20th century.

Koichi Shimokawa

PREFACE

The automotive industry has become a global industry. However, a quarter of century ago, nobody could guess that this would be a global industry and would be greatly linked with the fate of our new civilization at the beginning of the 21st century. A quarter of a century ago, in other words, before the end of 1970s, the automotive industry was only a local or regional industry which was independently established, although it was already an industry that represented regions and nations, particularly in the advanced countries.

Certainly, no one expected that this industry would develop in Asian countries to such an extent that South Korea and China have become countries which annually produce 3 million and 4 million cars respectively. Of course, even during this period, there were multinational companies existing in the automotive industry, such as America's Big Three which produced cars in America and Europe. But there was almost no actual business affiliation that existed between these two areas.

However, automotive production, especially in Asia, is increasing remarkably today. It is only a matter of time until the production performance combined of China and South Korea exceeds Japan's domestic production. And the current situation in Japan shows that, in comparison to domestic production, the volume of overseas automotive production is increasing every year. In North America, the biggest foreign market, the annual production volume of cars has reached nearly 4 million, and this is twice as much as Japan's export volume. Today, the automotive industry is a global industry which cannot exist without practicing global corporate behavior and strategies.

This means that the operation of the industry should be available at any place of demand in the world, and this includes the construction of global product-development, parts-procurement and production systems. At the same time, we should not forget that as the globalization of the automotive industry progresses, the industry has to face up to the issues of the civilized world of the 21st century. That is, to morph into an industry which takes responsibility in such areas as energy, resource and environmental issues, which are becoming more and more serious.

The globalization of the automotive industry cannot be discussed without examining the prospects for how automotive civilization will develop in the future. However, in order to manage these kinds of prospects, it is necessary to have an accurate understanding of why the

automotive industry had to go global, what the reality was for the paradigms for conversion which influenced the industry, how it changed historically and what this means.

The automotive industry in the 20th century started with car-manufacturing craftsmen in Europe, and then it developed along the paradigm of mass-production and mass-sales, of which the Ford System and GM's Sloanism are representative. It was believed that if the car-ownership ratio increased along with the cost-reductions created by mass-production, and as long as a replacement demand was created by the diversification of products and model changes, then society would be enriched. However, there was a trap hidden in the paradigm of mass-production, and this gradually became clear as we came closer to the end of the 20th century. This became particularly apparent when the sense of value that mass-production and mass-consumption would enrich people's lives collapsed. In other words, the automobile industry has been caught up in the problems of energy, resources and traffic, and now it has to face up to social requirements for building energy-saving cars, clean-energy cars that don't rely only on fossil fuel, cars which recycle resources, fail-safe cars and a traffic system that can dramatically reduce traffic accidents. The fact is that the automotive industry faces such serious problems along with the globalization of the industry; these relations are neither too close nor too remote from each other, and the challenge of solving these problems has just begun.

When we perceive the globalization of the automotive industry with this train of thought, we realize that a great change is occurring in the automotive makers' business process of development, production, procurement and sales. This process is equivalent to the mass-production and mass-volume-production which was the basic paradigm for the 20th century's automotive industry as it arranged mass-production, mass-sales and mass-consumption. This led to the emergence of a Lean-production System which could perform flexibly with changes of demand and which operated all through the processes of development, production, procurement and sales. MIT's International Motor Vehicle Program (IMVP) in America, which I have been involved with for 20 years, made the paradigm of the Lean-production System known to the world, and it is believed that this paradigm started in the Japanese automotive industry in the 1980s. Today, it is universally known that auto-makers everywhere in the world are racing to adopt this business system.

The aims of this book are to show how the world's automotive industries went global in the last quarter of the 20th century and how the changeover to this important paradigm was made. These questions will be examined based on data from field surveys conducted over the years and on the knowledge I have gathered from my involvement with two big international projects: MIT and Groupe d'Etude et de Recherche Permanent sur l'Industrie et les Salaries de l'Automobile (GERPISA). Part I of this book discusses how a reversal occurred in the competitiveness of the Japanese and American automotive industries, of which a key factor was the oil crisis in 1979, and how the international comparison of productivity and Japan's comparative advantage were made possible. Furthermore, the *Keiretsu* organization and business relations with parts makers, which made Japan's comparative advantage possible, are observed from the two aspects of production and sales/distributions. Part II covers the internationalization of Japan's automotive industry, which gained momentum from the mid 1980s, and the situation of local production overseas, which symbolizes internationalization. This part also shows how the Lean-production System or the Japan-style production system, which developed in Japan, was transferred to local plants and how they in turn adapted to the local situation. This part also examines how this move made an impact on America's Big Three, especially on the system of their plants. Part III goes over the historical background of the Japan-style production system which took an essential role in the Lean-production System. This part also examines the modern development of the Lean-production System and the automation system, as well as the global development of the Toyota Production System, which represents the Japan-style production system. Part IV offers a multidirectional analysis into the reality of global competition in the 1990s, and this is the newest and most important part as it looks towards the future. This part covers the revival and reinstatement of Europe and America's automotive industries in the 1990s, as well as the IT revolution and the realities and problems of global strategies which made the revival of the automotive industries possible. Furthermore, this part summarizes the deterioration of the international competitiveness of Japan's automotive industry and its restructuring. These happened because of the appreciation of the yen and the collapse of the bubble economy in the first half of the 1990s, and these were a first experience for the Japanese automotive industry.

This part also shows what Japanese auto-makers learned from this bitter experience and how they went global. Chapters 13 and 14 of Part IV cover the global reconstruction of the automotive industry, which entered the global era, and the relocation of the auto-parts industry; and these chapters analyze how the *Keiretsu* auto-parts transaction, which was one of the strong points of Japan, changed. Chapter 15 shows how the European automotive industry, which seemed to have lagged behind in the process of globalization and adopting a Lean-production system, went global and how it developed its own European strategies. This analysis is based on a recent field survey. Chapters 16 and 17 examine auto-related business in Asia which has drawn particular attention in recent years. The examination starts with ASEAN, where Japan has much presence, and then it looks into the prospects for China's automotive industry (where the influence of Japan's automotive industry is becoming apparent, especially in recent years), and the strategies adopted by Japan's auto-makers against China.

Based on this discussion, in Part V special consideration is given to the future prospects for and tasks of Japan's automotive industry. An historical summary and a retrospective of the automotive industry in the world are attempted, while it is facing an important paradigm for conversion and is changing.

Considering the history of this last quarter of the 20th century, it was an era in which the world automotive industry experienced dynamic and dramatic changes before it went global. Changes occurred in various areas, including the engineering of cars, production systems, development systems, supplier systems, sales/distribution systems, the social system around cars and the business system which utilizes this social system. And these changes will continue to evolve. A summary of this quarter-century of the automotive industry after globalization doesn't end as a mere historical retrospection, but it also means to look towards the future of auto-civilization and industrial-paradigms. On the basis of this kind of modern, future-oriented view, I would be pleased to consider the future of the global automotive industry together with researchers who are focused on the automotive industry, with the people in the automotive industry themselves, those people in charge of policy making, and with consumers as well as readers of this book. I hope that strong interest and feedback will follow on from this account.

CONTENTS

LOCAL AND ORGANISATIONAL EMBEDDEDNESS OF ENGINEERING SERVICES IN THE ORGANISATION OF CO-DEVELOPMENT IN THE AUTOMOBILE INDUSTRY

Bernd Rentmeister and Eike W. Schamp

The geographical organisation of the processes involved in the generation of knowledge is not yet sufficiently understood. Firstly, knowledge is not ubiquitous but is localised in "islands" described as centres of competences or islands of innovation. Secondly, the processes of generation of knowledge are subject to the division of labour as is the case in the production of goods. Several empirical analyses on the spatial organisation of knowledge processes are available from the field of innovation studies (esp. pharmaceutical research) and financial services. They analyse the tension between the need for the local presence of researchers and experts at specific places referred to as "milieux" or "clusters", and the need for the creation of networks, sometimes at a global level. There is little research experience with the engineering services rendered in the course of the co-development of automobiles with OEMs.

The GERPISA group in particular has recently paid considerable attention to the organisation of the processes of co-development (Hirt 2004). These studies need to be extended for two reasons: firstly, they scarcely touch upon the geographical division of labour and the organisation of knowledge processes, and secondly little information is available for Germany apart from some work by Jürgens (2000, 2003). A recent study by economic geographers has examined the development of the engineering services sector in co-development and its spatial organisation based on a case study of Opel in Rüsselsheim (Rentmeister 2002, Schamp/Rentmeister 2004, Schamp/Rentmeister/Lo 2004).

Co-development in the automobile industry grew extremely rapidly in Germany in the 1990s because of technological (e.g. digitalisation of product development) and organisational developments (simultaneous engineering, i.e. parallelisation of product development). Both processes contributed considerably to an acceleration in model development. A new "market" for engineering services was thus created. No other industry showed such growth in "external engineering services" as the automobile industry. In 2002, for example, more than 14,700 million € were spent on R&D in the industry. Circa 25% of this (3,800 million Euro) went on external R&D expenditure. The greater part of this went to knowledge-intensive "engineering service companies". Thus, more than half of all external R&D expenditure is generated by the automobile industry (in comparison: of the 40,600 million Euro R&D expenditure in German industry as a whole 7,100 million Euro were spent externally; Marquardt/Wudtke 2004, p. 3). The large number of (small and medium-sized) engineering services providers is a specific characteristic of the European automobile industry (Jürgens 2003, pp. 126ff). The outsourcing of development services in the 1990s enabled a large number of engineering service providers to grow rapidly from small beginnings to large, multi-locational businesses, working for many or all of the OEMs in Germany. Engineering service providers in co-development in the automobile industry have specialised almost solely on this group of customers. At the same time this market has remained remarkably national, while however being in a continual state of flux. After the rapid growth in the 1990s it now seems to have entered a phase of consolidation, characterised by mergers, internationalisation and buyouts by large systems suppliers.

The OEMs pursued different strategies in the outsourcing of development services, largely predetermined by their internal organisational and decision-making structures. Every restructuring in an OEM has consequences for the way in which engineering service providers are integrated in development processes. The increasing modularisation of vehicle architectures and vehicle models in the OEMs considerably expanded the sphere of activity of large engineering service providers, so that these could develop into suppliers of entire module and system developments or even developers of niche vehicles. While this makes it possible to integrate different fields, the parallel application of a simultaneous engineering strategy requires a careful separation and co-ordination of work processes. While close personal communication between OEM employees and the service provider is essential in the concept-phase when tasks are being identified (involving the definition of interfaces), in the phase of series development (when modules and systems are clearly defined) work processes can be "de-localised". The integrated development of individual modules and systems can take place at spatially disparate locations. Information technology becomes increasingly important for facilitating co-ordination between module and systems developers. In order to retain control over the development process, the OEMs make use of "geography", i.e. they stipulate a locational "commitment" on the part of the engineering service provider. Technology is used to retain control over the development process when the OEMs insist that the engineering service providers use the OEMs' own CAD systems and data standards (see also Dankbar 2004).

Different levels can be identified in the analysis of the locational organisation of development services. In the case of engineering services, a pyramidal form has rapidly developed, similar to the OEMs' supplier system. The first external engineering service providers were often spin-offs from an OEM's development centre. As familiar from cluster research, spin-offs develop from focal businesses in local systems. As well as the reasons for the development of a knowledge cluster discussed in cluster research, studies of the automobile industry have shown that OEMs employ practices which make geographical proximity to the customers' development centre appear necessary for "market entry". In particular, this has to do with regulations and communication standards specific to the OEMs (e.g. CAD systems), the assignment of contracts / division of labour (e.g. accreditation and certification) as well as methodological

procedures in simultaneous engineering (e.g. with regard to team formation), with which development suppliers are required to comply. Thus, some engineering service providers expanded on the rapidly growing market in the 1990s by opening branch offices "at the gates" of (practically) all OEM development centres in Germany. Although there are considerable differences in the way in which they organise the process of model development in co-development, it is interesting to note that the bigger engineering service providers have become customers of both German and foreign OEMs (e.g. Edag, AVL, Bertrandt, Invenio, IVM, Rücker). The big engineering companies created an internal locational division of labour between their respective headquarters with central development and testing or prototype production, and decentralised offices close to the OEMs' development centres. They thereby generate specific routines in the locational division of labour for project organisation (e.g. by creating competence centres, movement of resident engineers, dismantling and relocation of "work parcels"). In contrast, decentralised offices close to large systems suppliers are quite rare. The large engineering offices close to OEM development centres are accompanied by further smaller engineering service providers, some of whom work with the big offices. This points to the existence of certain mechanisms of local embeddedness / local (focal) networks.

In the context of this (changing) configuration of knowledge processes, specific organisational forms and phases develop in co-development with regard to team building, the variability of the team, and the use of so-called resident engineers (from other locations and businesses), each of which are associated with specific locational requirements and means of communication. A conflict thereby arises for the engineering service provider between the need to protect his input of knowledge ("via local embeddedness") from the ("non-local") competition as required by the customer-OEM, and the necessity of attaining cost-saving ("not locationally specific") economies of scale in development processes. This produces a specific constellation of development steps which are carried out in a context of local "embeddedness" and others carried out in a context of non-local, organisational embeddedness.

The locational and organisational pattern that developed by the late 1990s in co-development and engineering services in Germany, is however quite fragile, because it is threatened from two directions. Firstly, by the reintegration of development tasks into the (large) development centres of the OEMs, which could happen at any time (e.g. seat development by VW), which is frequently justified less by cost-saving arguments than the securing of future "development capabilities" and the accentuation of brand-specific vehicle attributes ("total vehicle integration"), secondly by the increasing level of integration among large systems suppliers through acquisition (e.g. the purchase of p.a.d. Karrosserietechnik by ThyssenKrupp Automotive, IVM by Edscha, PDE automotive by Benteler, ThyssenKrupp Automotive's involvement in Bertrandt or that of MSX International in Cadform Engineering, the joint venture between Webasto and Pininfarina, the fusion of P+Z Engineering and Italian Tesco). In order to protect themselves from a greater degree of dependence on the OEMs and the cyclical pattern of contracts in the automobile industry, some engineering service providers have been expanding their strengths in neighbouring sectors such as the aviation industry (compare Rücker, Bertrandt, IABG, P+Z Engineering, Edag takeover of Sigma Concurrent Engineering). One example is the newly founded Rücker Aerospace in Hamburg, which now employs 550 engineers and plans to employ a total of 700 by the end of 2005. Recent examples also show that engineering service providers are closing or amalgamating branches in Germany and abroad (FTD 2004). The "geography" of automobile development (Schamp/Rentmeister 2004) is currently retaining its basic pattern thanks to the persistence of the large development centres, but continues to be precarious and subject to change.

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A STUDY OF THE CAR IN ITALY. NOTES FOR A SOCIAL AND ENVIRONMENTAL HISTORY

Federico Paolini

So far literature on the car consists chiefly of papers on the history of car manufacturers[1] of pamphlets largely influenced by the environmental debate[2] and of a large number of articles at a popular and rather superficial level, devoid of any intention to reflect on historical or contextual issues applying research methods and relying on bibliographies[3] Restricting ourselves to the social history aspect, we will be confronted by three methods of approach.

The first is concerned with "utility-value" and explains the extraordinary commercial success of the car, with its versatility of use and, at the same time, with its connotation as a status symbol.[4]

The second stresses the importance of the car as one of the principal agents in the technological revolution of the second half of the 20th Century, and of its role in the modernization of society.[5]

The third analyses the changes in town planning induced by the requirements of the vehicle, and, in particular, aspects connected with traffic, policies for urban infrastructure, and new patterns of settlement favoured by the development of private transport.[6]

With regard to the Italian situation, for which there are no works of reference.[7] we cannot fail to note choices of a political nature in the course of the first four legislatures, that conceived a system of communications centred essentially upon private transport and which, between 1950 and 1974, absorbed the greater part of public finance. On the other hand, it was the car industry which propelled steel, chemical, petrol, building, electrical and mechanical industries effecting the entire productive and industrial relation systems. The emphasis on heavy industry, which at the time appeared as the new model for enterprise capable of leading the modernization of Italian economy, is largely due to car factories that concentrated their assembly lines in large factories and standardised the organization of work by means of a progressive separation of productive processes.

1. Cf. J. P. Womack, D. T. Jones, D. Roos, *La macchina che ha cambiato il mondo*, Milano, Rizzoli, 1991 and the publications by the Gerpisa network (Groupe d'Etude de Recherche Permanent sur l'Industrie et les Salariés de l'Automobile), in particular M. Freyssenet, A. Mair, K. Shimizu, G. Volpato, *One Best Way? Trajectories and Industrial Models of the World's Automobile Producers*, Oxford, Oxford University Press, 1998.
2. Cf. K. R. Schneider, *Autokind vs. Mankind, an Analysis of Tyranny, a Proposal for Rebellion, a Plan for Reconstruction*, New York, Norton, 1971; J. Jerome, *The Death of the Automobile: the Fatal Effect of the Golden Era 1955-1970*, New York, Norton, 1972; E. Rothschild, *L'automobile. Fine di un'era*, Milano, Feltrinelli, 1974; L. Russell, *Running On Empty: the Future of the Automobile in an Oil-short World*, New York, Norton, 1979; C. Ward, *Dopo l'automobile*, Milano, Eleuthera, 1992; W. Zuckermann, *Fine della strada*, Padova, 1992; G. Viale, *Tutti in taxi. Demonologia dell'automobile*, Milano, 1996.
3. Among general works, cf. D. Burges Wise, *Storia dell'automobile*, Novara, De Agostini, 1977 e P. Roberts, *The History of the automobile*, New York, Exeter Books, 1984.
4. The most important study in this area is D. Thomas, T. Claydon, L. Holden, *The motor car and popular culture in the 20th Century*, Adelshot, Brookfield, 1998. Cf. also R. Flower, *One Hundred Years on the Road: a Social History of the Automobile*, New York, McGraw Hill, 1981; J.J. Flink, *The Automobile Age*, Cambridge Mass., Mit Press, 1988; K. Sandquist, *The appeal of automobiles: human desires and the proliferation of cars*, Stockholm, 1997; M. S. Foster, *A Nation on wheels: the Automobile Cultur e in America since 1945*, Bel-mont, Thomson, 2003.
5. Cf. P. J. Ling, *America and the automobile: technology, reform and social change*, Manchester, M.U.Press, 1990; R. Schwartz Cowan, *Automobiles and Automobility*, in Id., *A social history of american technology*, New York-Oxford, Oxford University Press, 1997.
6. J.C. Delacroix, *L'automobile dans la cité*, Bruxelles, Credit communal de Belgique, 1978; H. L. Preston, *Automobile Age Atlanta: the Making of a Southern Metropolis 1900-1935*, Athens, University of Georgia Press, 1979; D. J. St. Clair, *The Motorization of American cities*, New York, Praeger, 1986; P.W.G Newman, *Cities and Automobile Dependance: a Sourcebook*, Aldershot, Gower, 1989; M. Wachs, *The Car and the City: the Automobile, the Built Environment and Daily Urban Life*, Ann Arbor, University of Michigan Press, 1992; C. Mc Shane, *Down the Asphalt Path: the Automobile and the American City*, New York, Columbia University Press, 1994; C. Lamure, *Quelle automobile dans la ville?*, Paris, Presses de l'Ecole nationale des pont et chaussée, 1995; G. Dupuy, *Les territoires de l'automobile*, Paris, Anthropos, 1995; G. Dupuy, *La ville et l'automobile*, Paris, Flammarion, 1995, R. W. Longstreth, *City Center to Regional Mall: Architecture, the Automobile and Retailing in Los Angeles*, Cambridge Mass., Mit Press, 1997.
7. The only studies in this area are: G. Berta, *La civiltà dell'auto*, in *Vita civile degli italiani*. 6°: *Trasformazioni economiche, mutamenti sociali e nuovi miti collettivi*, Milano, Electa, 1991; O. Calabrese, *L'utilitaria*, in M. Isnenghi (Ed.), *I luoghi della memoria. Simboli e miti dell'Italia unita*, Roma-Bari, Laterza, 1996; G. Volpato, *La macchina che ha cambiato il mondo*, in *Atlante del Novecento*, Torino, Utet, 2000.

The car, therefore, received a "special treatment" under the pressure of lobbies (a great number of car supporters had seats in Parliament) supported by the prospect that a decline of the car industry might cause a crisis effecting the whole Italian industry. Proof of this was the shelving of numerous bills which, it was feared, might slow down the development of private transport. Suffice to look at the extraordinary slowness with which local administrations began, with extreme circumspection, to pass legislation aimed at regulating traffic in urban centres, or at the belated environmental legislation, or again at the absence of policies aimed positively at encouraging public transport for commuters.

Undoubtedly the car industry took advantage of such choices, but it would be an exaggeration to attribute the success of the car mainly to provisions of a political nature: a transport system characterised by a greater variety of means and by more efficient public trasport, would have lessened the problems of congestion in road traffic, encouraging a more moderate and rational use of private vehicles, but it would not have affected the general inclination towards the acquisition of cars. Proof of this is the fact that even in countries where cities are endowed with efficient systems of rail transport (trams and metropolitan underground railways) and where the transport of goods does not rely chiefly on lorries, car density is superior or equal to that in Italy.[8]

In order to explain the extraordinary expansion of private transport in Italy, explanations centered upon the nature of the transport system do not appear satisfactory neither do economic explanations, which attribute the expansion in car consumption exclusively to the steady increase in income which took place between 1950 and 1974.[9]

The growth in income enabled people to assign a greater part of their own income to the acquisition of convienent and superfluous goods, but it does not explain the structural change which took place over a period of only two decades in the budget of Italian families, characterised by an unstoppable growth in transport expenses. To comprehend what seems to be a truly epochal change in the daily habits of the Italians it is therefore necessary to refer both to utilitarian reasons and to cultural and hedonistic reasons of personal gratification.

In Italy, more than elsewhere, the car has not only been a means of transport or a product of technology capable of revolutionising land transport, but it has also been the agent of social transformation, a symbol of freedom, independence, wellbeing and progress all at the same time.

Furthermore, during the later post war years, it has contributed to the completion of the process of national unification initiated a century before by the railways. While television was tearing down linguistic barriers, the car shortened geographical distances, also by creating a new symbolism which became established within the collective perception according to which modernization was identified with the racing cars of the "Mille Miglia", economic Fiat cars, the viaducts and tunnels of the "Autostrada del Sole", the bold architectures of the road system and the Motta and Pavesi motorway autogrills.

In short, economic Fiat cars have been the most visible symbols of that push towards modernization which guided the economic transformation of Italian society during the later post war years, while the elegant vehicles produced by Lancia and Alfa Romeo contributed to attract world wide attention to "Made in Italy" products.

The car, however, not only changed daily life. In fact, with the progress of the "motorcar revolution", physical space also radically changed in our country: the landscape was greatly altered by motorways and by their newly built infrastructure.

A cover of the popular magazine "La Domenica del Corriere" (7th August 1966), for example, presented the Brenner Pass motorway as a «bridge over Europe»: the illustrator's brush depicted the ribbon of tarmac and concrete flying over the snow clad peaks of the Alps, filled in both directions by cars with happy families going on holiday. Roads and motorways were dotted with billboards, which were a bad Italian habit at the time, advertising the consumer goods that characterised a newly conquered life style.

Furthermore, urban space itself appeared to have been newly planned to suite a new mobility: viaducts, road junctions, car parks, petrol service stations and garages, supermarkets "planned around the car", squares and roads filled with parked cars, new suburban high rise tenement blocks, with their adjacent car parks, defined a new architecture for the expanding city. Environmental changes brought about by the car have presented us with entirely new problems.[10]

[8]. S. Finardi e C. Tombola, *Il sistema mondiale dei trasporti*, Bologna, Il Mulino, 1995, pp. 204-205, 218-219.

[9]. The question of car consumerism is undoubtedly the least described, being often confined to the realm of gender studies . Cf. A. Marcus, *Racial Differences in Consumption and Automobile Ownership*, Ann Arbor, University of Minnesota, 1959; S. Bayley, *Sex, Drink and Fast Cars: the Creation and Consumption of Images*, London, Faber and Faber, 1986; V. Scharff, *Taking the Wheel: Women and the Coming of the Motor Age*, New York, Free Press, 1991.

[10]. To this day we do not have a true historiography which analyses in a historical perspective, the environmental impact of the car. The most interesting essay on the matter, only in part dedicated to the environmental consequences produced by the use of private vehicles and restricted to the United States, remains R. Nader, *L'auto che uccide* (Milano, 1967). Two papers not expressedly dedicated to the car, but which tackle the environmental problems caused by motorization, are: M. V. Melosi, *Environmetal Crisis in the City: The Relationship between Industrialization and Urban Pollution*, in Id. (Ed.), *Pollution and Reform in American Cities, 1870-1930*, Austin, University of Texas Press, 1980; J. A. Tarr, *Urban History and Environmental History in the United States: Complementary and Overlapping Fields*, in C. Bernhardt (Ed.), *Environmental Problems in European Cities in the 19th and 20th Century*, Munster, Waxmann, 2001. In Italy existing studies on the subject (published by civil engineers, doctors and biologists in journals specialising in transport problems) have a technical/descriptive character and in the main deal with questions of air pollution and noise.

The other side of motorization was, in fact, the incredible traffic jams caused by the inadequacy of the road system and by illegal development which took away vital space for roads and for car parks; old town centres defaced by parked cars and air pollution and damage to the landscape caused by often unnecessary infrastructures, both badly planned and overly intrusive. It was in the early '70s that the future of the car appeared to be put into question by measures taken by local administrations who, however belatedly, started to restrict access and parking in town centres, under the pressure of alarming statistics on pollution which induced governments to take the first measures aimed at restricting car exhaust emissions, and also the "oil shock" of 1973-1974, and motorway scandals.

In this context, both car manufacturers and the trade press, began to wave the red shirt of crisis, not realising that, while they denounced the spread of "autophobia" across the country, the recovery was already under way with the production of new models launched on the market which Italians were not prepared to renounce.

The car continued (and still continues) to be liked: it is difficult to understand whether it is liked because of its speed or for the power of its engine, for the comforts of the vehicle's interior or for its design, or again, for the comfort and flexibility of its use. However, it is probably liked for all of these reasons put together.

L'actualité du produit

Ugo Puliese

LINCOLN DESCEND DE SON PIEDESTAL

Lincoln est une marque assez peu connue en dehors des Etats-Unis. Peu de non Américains savent qu'elle appartient à Ford ou même qu'elle est une marque de prestige. Et pourtant, il s'agit de la marque sur laquelle Ford fait les plus fortes marges. En outre, la Lincoln Continental a été longtemps la voiture utilisée par les présidents des Etats-Unis.

La marque Lincoln a toujours été la rivale de Cadillac. Elle a en effet été créée en 1917 par un ancien dirigeant de Cadillac qui vouait une très grande admiration au Président Abraham Lincoln et qui avait souhaité en faire la marque de référence du luxe américain. En 1922 elle a été rachetée par Ford qui faisait ainsi sa première incursion sur le terrain du sloanisme.

Les problèmes de Lincoln sont les suivants : elle se trouve confrontée à une concurrence de plus en plus fournie, que ce soient les marques européennes ou japonaises (Lexus, Acura et Infiniti) sans oublier la concurrente de toujours, Cadillac, en pleine cure de rajeunissement. Le marché des berlines de haut de gamme est de plus concurrencé par celui des *light trucks* (plus particulièrement par les tout terrain de haut de gamme). Par ailleurs, Ford se trouve dans une situation financière difficile et il tend à faire le tri dans ses investissements. Enfin, le semi échec de Premier (surtout patent dans le cas de Jaguar) ne peut que pousser Ford à s'interroger sur sa stratégie en haut de gamme.

Lors de la création de PAG, Lincoln avait été intégrée au nouveau groupement avec l'idée d'en faire une marque mondiale de prestige.

Elle devait utiliser une plate-forme à propulsion qui aurait été partagée avec les autres marques de PAG, mais la cohésion avec la marque Mercury (située traditionnellement entre Ford et Lincoln) n'était pas très forte et les lancements de quelques nouveautés comme le pick-up Blackwood et l'Aviator n'ont pas été couronnées de succès.

Peu à peu, l'image de la marque s'est confondue avec celle de Mercury. Cette confusion avec Mercury est d'ailleurs entretenue par le fait que les deux marques sont diffusées par le même réseau.

En 2002, en raison des faibles marges dégagées par le modèle, Ford décidait de mettre fin à la carrière de la Lincoln Continental après des décennies d'existence et ce fut sans doute une erreur car, avec la disparition de ce modèle phare, l'image de la marque s'est très vite diluée dans celle de Mercury. Le modèle emblématique de Lincoln devenait en effet la Town Car, vendue surtout à des personnes âgées ou à des flottes et reposant sur une assez vieille plate-forme. Pas de quoi exciter les *yuppies*. Peu à peu, la traditionnelle rivale de Cadillac s'est transformée en l'égale de Buick, c'est-à-dire un cran en dessous en terme d'image. Après un record de 193 000 unités en 2000, les ventes de la marque se sont élevées à 150 057 unités en 2002, 158 839 en 2003 et à 139 016 en 2004. Il n'est donc pas étonnant que Ford se soit posé la question de savoir quoi faire de Lincoln. Il a pris la décision d'élargir l'offre à la fois pour donner plus de visibilité à la marque et pour alimenter le réseau. A la fin de 2004, la gamme Lincoln comptait quatre modèles dont deux berlines, la Lincoln LS lancée en 1998 et la Lincoln Town Car, elle aussi renouvelée en 1998. S'y ajoutent deux tout terrain, assez peu originaux car directement dérivés de deux modèles de la marque Ford pour répondre à la hâte à l'engouement de la clientèle pour les 4x4 : l'Aviator, dérivé de l'Explorer (la « vedette » de l'affaire Ford Firestone) et le Navigator, copie du Ford Expedition. A la fin de 2004, Ford décidait de mettre un terme à la carrière de l'Aviator dont la fin de production est programmée en juillet 2005.

La solution au problème de l'avenir de Mercury avait été assez vite trouvée, en poussant les synergies avec la marque Ford, avec Mazda ou avec Volvo. Dans le cas de Lincoln, la réponse était beaucoup plus difficile à trouver car il s'agit de véhicules statutaires de beaucoup plus grande taille.

Et pourtant, c'est la même solution que a été choisie. Au lieu de différencier Lincoln de ses marques cousines, Ford, pour des raisons de coûts, a décidé de la rapprocher des autres marques du groupe, avec le risque d'ancrer la marque beaucoup plus bas. En fin de compte, la politique choisie ressemble assez curieusement à celle élaborée pour Premier, à savoir un renforcement de l'offre par le bas (avec le succès très relatif que l'on sait dans le cas de Jaguar) et une utilisation des bases techniques disponibles dans le groupe Ford. Les objectifs recherchés sont d'instituer Lincoln comme une marque de luxe accessible et de lui rendre sa crédibilité en tant que marque de prestige. En terme de ventes, la marque doit atteindre un niveau de 200 000 unités par an. L'idée recherchée est de baisser les coûts et donc les prix et d'obtenir ainsi des volumes plus élevés. Lincoln ne concurrencera plus Cadillac que dans le bas de l'offre de ce dernier, le très haut de gamme devant être réservé à Jaguar.

En 2006, l'offre s'élargira ainsi par le bas avec la Zephyr qui reprendra, comme ses cousines Ford Fusion et Mercury Milan, la plate-forme de la Mazda 6. En 2007, une nouvelle génération d'Aviator reprendra cette même plate-forme pour devenir un véhicule métis (mariage de break et de 4x4 comme on en voit chez Audi). Enfin, deux berlines reprenant la plate-forme D3 de Volvo apparaîtront en 2007 et 2008. Malgré l'échec cinglant du pick-up Blackwood (3 356 unités vendues au total, le véhicule ayant été retiré du marché quinze mois après son lancement), Lincoln devrait refaire son apparition sur le segment des pick-ups en 2006 avec le Mark LT, dérivé d'un des véhicules les plus banaux (dans le bon sens du terme, c'est-à-dire vendu en grande quantité), le Ford F 150.

Le LT devrait être vendu beaucoup moins cher que le Blackwood, ce qui devrait selon Ford assurer son succès mais qui, selon les experts, devrait tirer une fois encore l'image de Lincoln vers le bas. On voit donc que le repositionnement de Lincoln prendra de toutes façons de nombreuses années.

Et contrairement à ce qu'ambitionnent de nombreux constructeurs avec leur portefeuille de marques, il s'effectuera vers le bas. Le cas du groupe Ford montre ainsi les limites du partage des plates-formes lorsqu'on se situe en haut de gamme où exclusivité et originalité s'accommodent mal des économies d'échelle.

Une année d'un constructeur

Jean Jacques Roubion

PSA PEUGEOT CITROËN

(réalisé à partir de la revue quotidienne de presse du CCFA)

En 2004, le chiffre d'affaires de PSA Peugeot Citroën a progressé de 4,7 %, à 56,8 milliards d'euros et, d'après la presse internationale, la position financière nette des activités industrielles et commerciales du groupe français affichait un solde positif de 1,42 milliard d'euros, contre 563 millions en 2003. Le chiffre d'affaires de l'automobile a augmenté de 4,8 %, à 45,8 milliards d'euros, avec une marge opérationnelle de 1,12 milliard d'euros, soit 2,5 % du chiffre d'affaires, à comparer à 1,30 milliard d'euros et 3 % du chiffre d'affaires en 2003. Cette évolution serait le résultat de l'augmentation des ventes mondiales du groupe et de l'effet de mix-produit lié à la hausse des volumes des modèles lancés récemment.

PSA Peugeot Citroën a vendu 3 375 300 véhicules dans le monde en 2004, contre 3 286 100 en 2003. Alors que les ventes de Peugeot ont pour la première fois franchi la barre des 2 millions d'unités (+ 5,9 % par rapport à 2003), celles de Citroën ont baissé de 1,7 %, à 1,348 million d'unités. D'après les déclarations de M. Jean-Martin Folz, président de PSA Peugeot Citroën, divulguées par *les Echos* et *la Tribune* (23/09/04), 2004 a été une année de transition pour le groupe français, mais ses ventes devraient repartir à la hausse en 2005, notamment grâce aux nouveautés dont disposent ses deux marques, telles que la Peugeot 1007 et la Citroën C4, entre autres. En 2004, le groupe a choisi de privilégier la rentabilité par rapport aux volumes dans un contexte commercial tendu. Sa part de marché en Europe occidentale s'est établie à 14,7 %, en recul de 0,7 point par rapport à 2003. Hors d'Europe occidentale les ventes de PSA ont bondi de 16,3 % (+ 24 % pour Peugeot), notamment grâce à la reprise des marchés d'Amérique latine et de Turquie.

Néanmoins, Citroën a pâti du ralentissement du marché chinois, de la concurrence accrue que s'y livrent les marques et de la baisse des prix des voitures.

Dans le cadre de l'expansion de PSA Peugeot Citroën en Europe de l'est, *Automotive News* (14/01/04) a révélé que suite à la décision du groupe français d'implanter une nouvelle usine d'assemblage dans la ville de Trnava (Slovaquie), les autorités slovaques se seraient engagées à refuser l'implantation de tout autre constructeur automobile dans un rayon de 100 km. Cet engagement devrait permettre au constructeur français de disposer d'un potentiel d'embauche élevé dans la région, étant donné que 3 600 personnes devraient être recrutées sur ce site.

Cette nouvelle usine aura, à son démarrage en 2006, une capacité de production annuelle de 300 000 voitures (petits véhicules), avec une enveloppe globale d'investissement représentant 700 millions d'euros.

En Espagne, *La Gaceta de los Negocios* (23/12/04) a révélé que la production de l'usine PSA Peugeot Citroën de Vigo a totalisé 458 200 unités en 2004, en baisse de 3% par rapport à l'année précédente et que les exportations ont représenté 87% de la production, notamment vers les marchés européens. Outre un investissement de 120 millions d'euros en 2004, destiné à optimiser son outil industriel, le groupe français étudie avec les entrepreneurs

locaux les moyens dont ils disposent pour améliorer la compétitivité du secteur automobile de la Galice afin de lutter contre les risques de délocalisation. D'après *El Mundo* (02/11/04), avec la production de 473 000 voitures en 2003, l'usine PSA de Vigo est devenue le premier site du constructeur en termes de production ainsi que le moteur industriel de la Galice. *Automotive News Europe* (08/12/03) a évoqué l'intention du groupe français d'y fabriquer trois nouveaux modèles : les remplaçants des Citroën Xsara Picasso (dès 2006) et Berlingo (dès 2007), ainsi que du Peugeot Partner (en 2007).

En ce qui concerne l'Amérique latine, la presse internationale a révélé que les ventes de PSA Peugeot Citroën n'ont reculé que de 1 % en 2003, malgré la baisse de 12 % enregistrée au Brésil. Cette amélioration conjoncturelle a incité le groupe français à investir davantage dans la région. *La Tribune* (22/03/04) a confirmé cette décision en annonçant qu'en 2004, le constructeur français comptait investir 40 millions d'euros dans son usine de Porto Real (Brésil), afin de lancer la fabrication d'un moteur à essence de 1,4 litres et du break Peugeot 206 SW qui, selon *Libération* (15/11/04), devrait être fabriqué à 15 000 exemplaires dès 2005 (sur les 80 000 qui sortiront des lignes de montage). Les modèles qui y seront produits seront destinés au marché brésilien (11 000 unités) ainsi qu'à d'autres pays de la région. Par ailleurs, M. Jean-Martin Folz a annoncé que le groupe travaillait au développement d'un moteur 100 % brésilien, fonctionnant au biodiesel. De plus, PSA Peugeot Citroën a annoncé le lancement, en 2005, de variantes des Peugeot 206 et Citroën C3 équipées de motorisations acceptant des mélanges variables essence-éthanol.

Quant à l'activité du groupe français en Argentine, M. Jean-Martin Folz a inauguré, le 23 mars 2004, une ligne d'assemblage dédiée à la production de la Peugeot 307, au rythme de 38 unités par jour, dans l'usine de Palomar, située dans la proche banlieue de Buenos Aires. Le président de PSA a annoncé dans les *Echos* (25/03/04) que la production d'un nouveau modèle en Argentine devrait à la fois augmenter l'activité et réduire les coûts de production du groupe. Par ailleurs, les *Echos* ont également révélé les résolutions du gouvernement argentin autorisant le principe d'une « usine sous douane » chez PSA, permettant ainsi au site du constructeur français d'être exempté des droits de douane sur tous les composants destinées aux voitures réservées à l'exportation vers l'Amérique latine. Il est à noter que PSA est le premier constructeur à bénéficier de cet avantage en Argentine.

PSA Peugeot Citroën a multiplié des coopérations avec divers constructeurs automobiles, régulièrement mentionnées dans la presse française et internationale, afin de réduire ses coûts en limitant les frais d'études et en allongeant les séries. Ces coopérations se caractérisent notamment par la production de moteurs communs, tels que les moteurs à essence produits avec BMW qui devraient équiper les Peugeot 207 et 208, les Citroën C3 et C4 ainsi que la prochaine génération de Mini. *La Tribune* (13/12/04) a annoncé que leur production devrait commencer en 2006 à l'usine PSA de Douvrin, à un rythme qui atteindra à terme 1 million d'unités par an. *La Tribune* (05/03/04) a également évoqué le programme de moteurs diesel en partenariat avec Ford, dont l'investissement total s'élèverait à 1.5 milliard d'euros. A ce propos, la presse internationale a révélé, en décembre 2004, l'intention de PSA Peugeot Citroën et Ford d'augmenter la capacité de production de leurs moteurs diesel communs de près de 600 000 unités en Grande-Bretagne et en Suède.

Cette progression, destinée à répondre à une forte demande, leur permettrait d'atteindre le premier rang mondial des constructeurs de moteurs de ce type, devant Volkswagen, tout en générant des économies d'échelle sans équivalent dans l'industrie. Le responsable du développement des moteurs de PSA Peugeot Citroën, M. Patrice Marez, a expliqué dans un entretien accordé à *Automotive News* (14/06/04) que le partenariat concernant les moteurs diesel mis en place avec Ford a permis au groupe d'accélérer et d'améliorer les recherches entreprises dans ce domaine. Selon lui, les objectifs de cette coopération sont la réduction des émissions et de la consommation de carburant ainsi que l'amélioration de l'image du diesel. Par ailleurs, d'après le *Financial Times* (01/07/03), Nissan aurait approché PSA Peugeot Citroën afin de se procurer des moteurs diesel pour des utilitaires légers assemblés aux Etats-Unis ainsi que des voitures de haut de gamme qui devraient être introduites en Europe d'ici 2010.

Quant à Toyota, *Automotive News* (29/01/04) a divulgué l'intention du groupe japonais de développer la production de l'usine tchèque de Kolin, détenue conjointement avec PSA Peugeot Citroën et dont l'entrée en activité est prévue en 2005.

Suite à ces déclarations, les deux constructeurs ont dévoilé à la presse internationale, le 1er décembre 2004, les trois modèles qui y seront produits au rythme annuel de 300 000 unités : les Citroën C1, Peugeot 107 et Toyota Aygo. Ces trois modèles résultent d'un projet commun dont l'investissement est estimé à 1,5 milliards d'euros et ont été présentés au public lors du Salon de Genève avant leur commercialisation, en 2005. En ce qui concerne une éventuelle coopération entre PSA et Mitsubishi, les deux groupes ont démenti les rumeurs d'alliance capitalistique et industrielle rapportées par la presse japonaise depuis le mois d'octobre 2004.

En Chine, afin d'enrayer le déclin de la part de marché de Citroën malgré la hausse des ventes de véhicules vendus en 2003 (hausse de 69% sur les neuf premiers mois de 2003), PSA Peugeot Citroën et le groupe chinois Dongfeng Motor ont décidé de porter la capacité de production annuelle de leur usine de Wuhan de 150 000 à 300 000 unités à partir de 2004. Les objectifs de la société conjointe des deux groupes en Chine, Dongfeng Peugeot Citroën Automobiles (DPCA), selon *Le Soir* (06/01/04), seraient le lancement d'une nouvelle Peugeot basée sur la 307 et conçue uniquement pour le marché chinois, à partir du mois de septembre 2004, ainsi que la production de la 206 à Wuhan, dès 2005.

Par ailleurs, la presse française a annoncé, en mai 2004, que la part des deux constructeurs dans la société DPCA

passerait de 36% à 50% et ce, dès le mois de juillet 2004. En effet, les deux groupes ont décidé de racheter les parts détenues par les quatre banques actionnaires (BNP Paribas, Société Générale, China Development Bank et China Oriental Asset Management), suite à un désengagement de ces dernières prévu dans le cadre d'un accord, signé en octobre 2002, sur l'élargissement de la coopération entre les deux groupes.

En ce qui concerne les sites de production français, *les Echos* (05/07/04) présentent l'usine de Tremery, en Lorraine, comme étant la plus grande usine de moteurs diesel du monde. Ce site emploie 5 000 salariés et s'est doté d'un nouvel atelier qui livrait, en 2004, près de 200 moteurs diesel (de la famille DV) par jour et qui devrait atteindre à la mi-2006 la cadence de 2 500 unités par jour. Quant à l'usine de Sochaux, la plus importante du groupe en termes de volumes de production (432 000 unités en 2003), *l'Usine Nouvelle* (06/07/04) a annoncé qu'elle devrait passer à un taux d'utilisation des nouvelles plates-formes de 94 % dès 2005.

Enfin, le nouveau centre de design de PSA Peugeot Citroën a été inauguré le 7 octobre 2004 à Vélizy (Yvelines) afin d'accueillir les studios de style de Citroën et de Peugeot, les équipes dévolues aux coopérations du groupe avec d'autres constructeurs, la direction de l'innovation de PSA, une partie du département marketing, des équipes chargées des plates-formes 1 et 3 et les représentants de certains fournisseurs. Selon *la Tribune* (06/10/04), ce centre s'inscrit dans un plan de modernisation de la recherche et du développement qui représente une dépense totale de plus de 200 millions d'euros.

Séminaires - Colloques

9th Annual Automotive News Europe Congress *"Sustaining Growth in the New Europe"* Spain (Barcelona), 4-6 May 2005

Some of the main topics of interest :
- What is the future of car production in Western Europe?
- Will Europe retain its status as the world's biggest auto market?
- Are Asian – and possibly Chinese carmakers – changing the rules for doing business successfully in Europe?
- How can automakers and suppliers assure quality and drive innovation, while lowering costs at the same time?

For further information :
http://www.networkevents.co.uk/events/anebcn05/index.htm

Contact : anec@networkevents.ltd.uk

Séminaire Entrepreneurs, villes et territoires – Ecole de Paris du Management

"Quand l'A380 aménage l'Aquitaine et Midi-Pyrénées", Jean-Philippe HANFF, directeur de Midi-Pyrénées Expansion, agence de développement de la région Midi-Pyrénées France (Paris), 11 mai 2005 (8h45-10h45)

Toulouse est devenue progressivement en cinquante ans un grand pôle de construction aéronautique grâce au succès d'Airbus. Mais avec l'A380 est engagé un nouveau défi technologique et commercial, non seulement au niveau de la taille de l'avion lui-même et de sa grande capacité. C'est aussi un défi au niveau de l'aménagement des régions Midi-Pyrénées et Aquitaine pour la fabrication, l'acheminement et l'assemblage d'éléments provenant de seize sites en Europe. Quel est déjà l'impact du projet A380 sur ces deux régions, leur développement économique et l'aménagement de leurs communications ? Comment se sont mêlés pouvoirs publics et organisations privées ? Quelles conséquences un tel projet a-t-il sur la gouvernance des territoires ?

Pour s'inscrire (dans la limite des places disponibles) et connaître les frais de participation, contactez Coralie Pelieu au 01 42 79 40 85, ou envoyez un mail à ecopar@paris.ensmp.fr

54ème Congrès de l'Association Française de Science Economique

France (Paris), du 15 au 17 septembre 2005

Date limite de soumission des propositions de communication : 30 avril 2005

Date limite de soumission pour la session poster : 7 mai 2005

Pour plus d'informations :
http://www.afse.fr/

5th International Conference on the Chinese Economy - CERDI-IDREC

"China in the World Economy : Internal Challenge and International Challenges"
France (Clermont-Ferrand), Université d'Auvergne, 20-21 October 2005
Papers, in French or in English, may focus focus on the following issues:
- Openness of capital markets
- Foreign trade and trade policy
- Foreign direct investment
- WTO accession impact on the Chinese economy
- Exchange rate policy
- China and the Asian free trade area
- Openness and economic reforms (state-owned enterprises, banking sector)

Deadline for abstracts : 15 May 2005
For further information (call for papers) :
http://www.cerdi.org/Colloque/CHINE2005/default_en.asp
Contact :
Annie Cohade : A.cohade@u-clermont1.fr

8th International Conference co-organised by the Faculty of Economics and Business Administration (Sofia University "St Kliment Ohridski") and the Laboratory of Economic Analysis and Research – International Economics and Finance (University Montesquieu – Bordeaux IV)

"Countries in Transition:Experience and Challenges of European Union Membership"
Bulgaria (Sofia), 17-19 November 2005
Main topics of interest :

- Economic reform and competitiveness of the real sector
- Exchange rate regimes, monetary policy, financial system structure
- Exit from transition and entry in the EU

Deadline for abstracts : 30 April 2005
For further information (Call for Papers) :
http://lare-efi.u-bordeaux4.fr/
Contact : Jean-Marc Figuet, LARE-efi, Université Montesquieu Bordeaux IV
Email : colloquesofia2005@u-bordeaux4.fr

Activité des membres

Cédric Lomba, « Beyond the Debate over 'Post'-vs 'Neo'-Taylorism : The Contrasting Evolution of Industrial Work Practices », *International Sociology*, Vol. 20, March 2005, pp. 71-91, (London, SAGE).

Centre documentaire

Danielle Lacroix

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BELLU Serge, SAUTELET Patrick, *ADN. Automotive Design Network*, Arcueil, Éditions Anthèse, 2004, 189 p.

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SCHOUTETEN Roel and BENDERS Jos, « Lean Production Assessed by Karasek's Job Demand-Job Control Model », *Economic and Industrial Democracy*, Vol. 25, 2004, pp. 347-373, (London, SAGE).

CALENDRIER DES RÉUNIONS DU RÉSEAU 2005

ESEMK Workshops

- jeudi 12 et vendredi 13 mai 2005, Bordeaux.
(WP5 – Politique produit et organisation productive)

- mardi 24 et mercredi 25 mai, Berlin (WP4)

" Change Dynamics of European Empoyment Relationships: New Governance Compromises in Britain, Germany and Sweden".

Comité de pilotage du GERPISA

- Mercredi 15 juin 2005, Ministère de la Recherche, Paris

13ème Rencontre Internationale du GERPISA

- 16-17 juin 2005, Ministère de la Recherche, Paris

LA LETTRE DU GERPISA

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