



**EU-Japan Centre  
for Industrial Cooperation**  
日欧産業協力センター

Old and New Spaces  
of the Automotive  
Industry



Towards a  
New Balance

**22ND INTERNATIONAL COLLOQUIUM  
OF GERPISA**  
**4-6 JUNE 2014**  
**KYOTO**  
[GERPISA.ORG](http://GERPISA.ORG)

# The Kyoto University Foundation



# Kyoto University, Clock Tower



## ORGANIZATION COMMITTEE

Stéphane Heim, GIS-Gerpisa, ENS de Cachan  
Bernard Jullien, GIS-Gerpisa, ENS de Cachan  
Tommaso Pardi, GIS-Gerpisa, ENS de Cachan  
Hiromi Shioji, Kyoto University

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## GIS GERPISA INTERNATIONAL NETWORK

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**EU-Japan Centre**  
for Industrial Cooperation  
日欧産業協力センター

**Tuesday**  
**3rd of June, 2014**

## Factory Visit

**8:30**

Meeting in front of the main gate (in red on the plan)

**8:50**

Departure from Kyoto University

**10:00-12:00**

Toyota Auto Auction [TAA] Kinki

12:00-13:00

Lunch at TAA

**13:00**

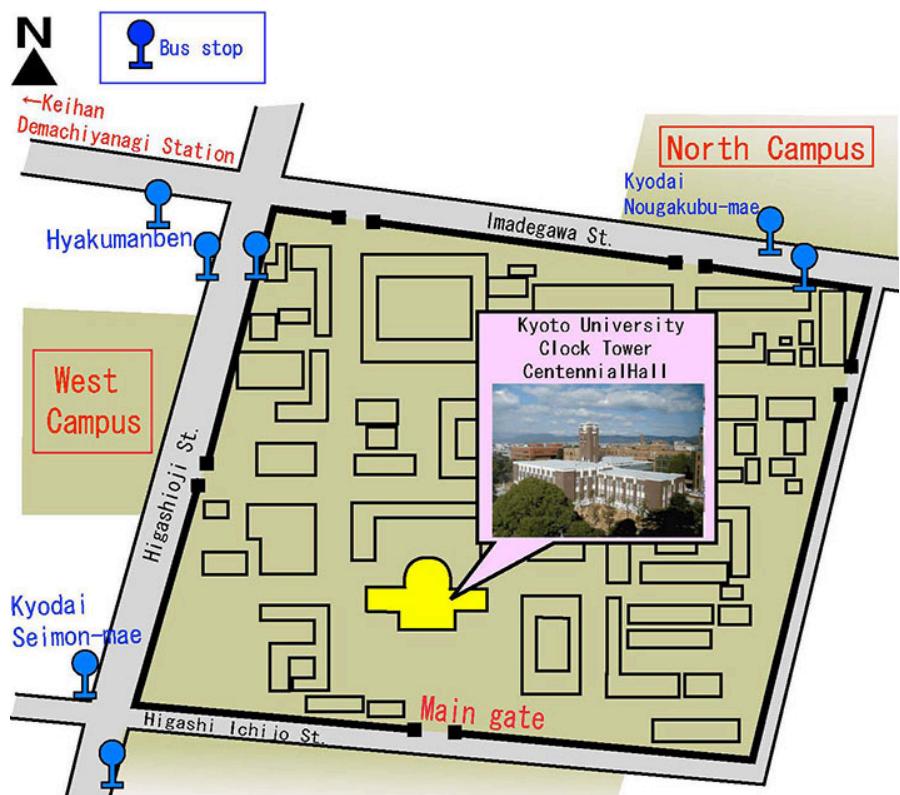
Departure for Scrapping Factory

**14:00-16:00**

Scrapping Factory IWAQ

**17:00**

Return to Kyoto  
University



# Wednesday 4th of June, 2014

**08:55 – 09:10**

## Welcome of participants

**09:10 - 09:25**

## Introduction of the colloquium

Hall I/II

**Bernard Jullien.** Director

GERPISA

**Kiyoshi Yoshikawa.** Vice

President of Kyoto University

**09:25 – 10:40**

## Plenary Session 1

Hall I/II

**Takahiro Fujimoto.** Professor,  
University of Tokyo, **Evolution of  
the Auto Industry – Capability,  
Architecture and  
Competitiveness –**

**Hiroyoshi Yoshiaki.** Managing  
Director, Toyota Motor, **The  
Future of Mobility**

**11:00 – 12:30**

## Plenary Session 2

Hall I/II

**Shinichiro Oka.** General Director,  
Singapore office, JAMA, **The  
Automobile Industry in ASEAN:  
A Historical and Analytical  
Overview**

**Shogo Nakagi.** Director, Japan  
Auto Parts Industries Association,  
**Japan Auto Parts Industries in  
Asia: Statistical Approach**

**Hiromi Shioji.** Professor, Kyoto  
University, **Competitiveness of  
the Japanese, Korean and  
Chinese Automobile Industries**

**12:30 – 13:45**

## Lunch

**Theme 1:** Automobilisation of societies, new and used car markets, and business opportunities in the industry

**Theme 2:** New powertrains and new forms of mobilities: global tendencies, politics and markets

**Theme 3:** Carmakers at a crossroads: new product architectures and new productive organizations?

**Theme 4:** Supply chains under pressure: internationalization and division of labour

**Theme 5:** Industrial policies as a lever of change? American, Asian, and European industries in perspective

**Theme 6:** Employment relationships: competencies in transition?

13:45 – 15:15

## Parallel sessions

### Session 1

#### Theme 5

##### Hall I

**Chair:** Boleslaw Domanski

1. **Ricardo Melgoza, Lourdes Alvarez.** The productive restructuring in the Canadian Automotive Industry.
2. **Akira Uno.** The growth of Japanese Gross National Income (GNI) dependence on the Japanese car industrial output in ASEAN markets: Japanese car industry's competitive edge in ASEAN.
3. **Stephane Heim.** Local contents, industrial policies: is there a Russian exception?

### Session 2

#### Theme 4

##### Room III

**Chair:** Thomas Klier

1. **Franck Fontanesi.** The mapping of vehicles and automobile components' international trade.
2. **Vincent Frigant, Martin Zumpe.** Towards a globalisation of the automotive supply chain? Lessons from the international trade of auto parts.
3. **Giuseppe Calabrese.** The restructuring of the tier 1 supply chain in Europe.

### Session 3

#### Theme 6

##### Room IV

**Chair:** Ulrich Jürgens

1. **Tetsuo Abo, Jorge Carrillo.** A Comparative Study of Application-Adaptation of Japanese Production System at Auto Subsidiaries in Developing Countries: Nissan and GM in South Africa, Egypt and Mexico.
2. **Koichi Shimizu.** The Strategic Behavior of Japanese Carmakers and its Impact on Employment.
3. **Koichi Shimokawa.** The Restructuring of the Global Auto Industry.

15:45 – 17:15

## Parallel sessions

### Session 4

#### Theme 1

##### Hall I

**Chair:** Bernard Jullien

1. **Joan Perez, Jean Grebert.** Expanding locations for growing middle classes of emerging markets.
2. **Philippe Byosiere, Denise Luethge, Hideki Tanaka.** The Young and the Restless: Unwavering Consumer Mindset versus Automotive Leadership.
3. **Yoann Demoli.** Social Inequalities in the Costs of Automobility in France (1980-2000).

### Session 5

#### Room III

#### Theme 3

**Chair:** Tommaso Pardi

1. **Marina Flamand.** The innovative strategies of carmakers in developing hybrid vehicles? A patent analysis of battery technologies.
2. **Kampker, A.; Burggräf, P.; Heimes, H.; Mathias Ordung.** Load carriers for battery cell production – Implementing the logistics development into the integrated product and process development.
3. **Philippe Byosiere, Denise Luethge.** Feel to Leap: Sustainable Innovation for the Automotive Industry.

### Session 6

#### Room IV

#### Theme 2

**Chair:** Julia Hildebrand

1. **Yveline Lecler, Bruno Faivre d'Arcier.** Car-sharing in cities: will electric vehicles change the business? A comparison between France and Japan.
2. **Sathya-Lekh Proag, Jonathan Bainée.** Deployment of an electric charging point network infrastructure in Paris: an economic analysis via CoBAYE.
3. **Hirofumi Tatsumoto.** Why innovation of new powertrains is so hard: the case study of fuel cell cars and hydrogen stations in Kitakyushu and Toyota city.

15:15 – 15:45

## Coffee break

# Thursday

## 5th of June, 2014

08:55 – 09:10

### Coffee & Pastries

09:10 – 10:40

### Parallel sessions

#### Session 7

Hall I

#### Theme 5

**Chair:** Sigfrido Ramirez

1. **Giuseppe Calabrese.** Towards the Italian Automotive Council.
2. **Dan Coffey.** Targeting the automotive industry for sustainable development: an assessment of the British Automotive Council.
3. **Tommaso Pardi.** Can the industry regulate itself? The mixed record of the Plateforme de la Filière Automobile in France.

#### Session 8

Room III

#### Theme 4

**Chair:** Stephane Heim

1. **Jaeho Lee.** Japanese car parts suppliers' growing strategies in the globalizing automotive industry.
2. **Boleslaw Domanski, Thomas Klier, James Rubenstein.** Is Central Europe the Mexico of Europe? The automotive semi-periphery in the comparative perspective.
3. **Junjiro Shintaku, Mizuki Kobayashi, Young Won Park, Takahiro Tomino.** Global supply chain management for responding to diverse markets: Case study of Toyota.

#### Session 9

Room IV

#### Theme 1

**Chair:** Bruce Belzowski

1. **Hideki Ogawa.** The History of Japanese Car Service Industry
2. **Marcos Amatucci, Veranise Jacobowski Correia Dubeux, Felipe de Sousa Esteves.** Instrumental, Symbolic and affective motives for car use in urban centres of Sao Paulo and Rio de Janeiro.
3. **Koji Shimada.** Testing the Causality among Gasoline Demand, Price, and Regional Income in Japan.

10:40 – 11:00

### Coffee break

11:00 – 12:30

### Parallel sessions

#### Session 10

Hall I

#### Theme 6

**Chair:** Elsie Charron

1. **Eishi Fujita.** New Toyota System in the 2000s.
2. **Seiji Manabe.** Applying the autonomation concept to white-collar departments at Toyota Motors: the basics of JKK (Ji Koutei Kanketsu)
3. **Masaki Saruta.** Toyota's employment relations after 2000 in Japan.

#### Session 11

Room III

#### Theme 4

**Chair:** Vincent Frigant

1. **Mihail Marinov, Daniel Arturo Heller.** Manufacturing Engineering in Europe and Japan: A Preliminary Comparative Case Study of Two Automotive Component Suppliers.
2. **Akira Tanaka, Masahiko Isomura.** Who coordinates automotive steel sheet in Japan ?

#### Session 12

Room IV

#### Theme 2

**Chair:** Yveline lecler

1. **Shinya Kajiki.** The Possibility of new development by the cooperation of next generation vehicle and home in Japan.
2. **Zejian Li.** Raison d'être and potential impacts: leading edge of the EV markets in China.
3. **Arturo Lara, A. Chavez.** Complexity, Intellectual Property and the evolution of the electric vehicles.

#### Session 13

Room II

#### Theme 1

**Chair:** Bernard Jullien

1. **Hua Wang.** Business model innovation in Chinese auto aftersales market.
2. **Dan Coffey, Carole Thornley C.** Traditional Market Structures Versus Sustainability: an inherited obstacle to change in the car industry?
3. **Julio Castellanos.** Financial analysis of the Volkswagen Group from financialization point of view (1991-2007).

12:30 – 13:45

## Lunch

13:45 – 15:15

## Parallel sessions

### Session 14

Hall I

Theme 5

Chair: Stephane Heim

1. **Patarapong Intarakumnerd, Nathasit Gerdtsri.** Evolution of Thai Automotive Sector: Implications for Technology Management and Policies.
2. **Juan Manuel Perez Debrand.** Economic and social externalities of the automobile industry development in Mexico and Thailand.
3. **Ana Gárriz, Demian Panigo, Pablo Gallo.** Common Automotive Policy between Argentina and Brazil: its impact at local and regional auto parts industries.

### Session 15

Room III

Theme 3

Chair: Holger Bungsche

1. **Lourdes Alvarez, Jorge Carrillo, Jordy Micheli.** Restructuring the automobile industry in the NAFTA region after the 2008 economic crisis.
2. **Chiara Pollio.** The auto industry in East Asian emerging economies: relations and scenarios of the regional production chain.
3. **Arturo Lara, Parra, G.; Chávez, A.; Guerrero, H.; Zuñiga, R.** The tangible-intangible dimension of the value chain of lithium-ion batteries: The case of new vehicles.

### Session 16

Room IV

Theme 1

Chair: Bruno Jetin

1. **Tommaso Pardi.** A model to follow? The impact of neoliberal policies on the British automobile market and industry.
2. **Bernard Jullien.** The apparent stability of French car demand and the decline of domestic production.

### Session 17

Room II

Theme 6

Chair: Boy Lüthje

1. **Hyung Je Jo, Jun Ho Jeong.** Hyundai's Employment Relations at a Crossroad: Engineers' Skill Formation and the Development of the Internal Labor Market.Eastern Europe.
2. **Jan Drahokoupil, Martin Myant, Stefan Domonkos.** Managing flexibility: Transfer of employment practices in automotive multinationals in Central and Eastern Europe
3. **Alex Covarrubias.** The dis-structuration and Mexicanization of labor relations in the American Auto industry: Two-Tier-Labor Systems in play and the reconfiguration of

governance compromises.

15:15 – 15:45

## Coffee break

15:45 – 17:15

## Parallel sessions

### Session 18

Hall I

Theme 6

Chair: Koichi Shimizu

1. **Ulrich Jürgens.** HRM Systems and Lean Production – A comparison between Volkswagen and Toyota.
2. **Mitsuo Ishida.** A Comparison of factory management at assembly shops at Volkswagen and Toyota.
3. **Keisuke Nakamura.** Comparing differences of the trade union functions at Volkswagen and Toyota.

### Session 19

Room III

Theme 4

Chair: Jorge Carrillo

1. **Erik Pascoal, Guido Muzio Candido, Ugo Ibusuki, Mauricio César Delamaro.** New Brazilian automotive policy and the increase of auto parts local content: a critical analysis of the automotive supply chain.
2. **Attila Havas.** National, sectoral and regional innovation systems: their interactions and influence on suppliers' strategies.
3. **Oscar F. Contreras.** Spillovers, spin-offs and the creation of local suppliers in the Mexican automotive industry

### Session 20

Room IV

Theme 2

Chair: Giuseppe Calabrese

1. **Kampker, A.; Deutskens, C.; Heimes, H.; Jan-Philip Ganser.** Fleet customization as the next step in the electrification of mobility – a case study.
2. **Julia Hildebrand.** European experiments on electric cars. Mass market or local niches ?
3. **Holger Bungsche.** The Light Vehicle Market in Japan: A Case of Market Protectionism or Cars Simply Meeting Essential Needs for Mobility?

### Session 21

Room II

Theme 3

Chair: Hua Wang

1. **Eiko Tomiyama.** Competitive Strategies of major Foreign Automobile Manufacturers in Russian Market.
2. **Hiroyuki Higashi.** The change of NPD process triggered by the change of product architecture: a case of Japanese OEM X
3. **Daniel Arturo Heller, Yumi Kato, Mihail Marinov.** The Competitiveness and Profitability of Japanese Automakers vis-à-vis their Western and Korean Counterparts: An analysis of the 1980s, 1990s, and 2000s.

# Friday 6th of June, 2014

08:55 – 09:10

## Coffee & Pastries

09:10 – 10:40

## Parallel sessions

### Session 22

Hall I

#### Theme 6

Chair: Jorge Carillo

1. **Boy Lüthje, Miao Tian.** Rebalancing China's Emergent Capitalism
2. **Hiraki Nohara.** The same problem, the same approach to solve and the different target for the solution.

### Session 23

Room III

#### Theme 4

Chair: Stephane Heim

1. **Igor Oliveira Fasti Souza, Adriana Marotti de Mello.** Innovative developments in the Brazilian automotive industry.
2. **Janette Brito Laredo.** Implementation of best organizational practices: Case of Mexican tier one supplier.
3. **Brunilde Verrier, Bertrand Rose, Emmanuel Caillaud.** Promoting best practices for industrial excellence integrated with sustainable development issues: the Lean and Green strategy.

### Session 24

Room IV

#### Theme 1

Chair: Tommaso Pardi

1. **Bruno Jetin.** Automobilisation of the US society, distribution of income and financing of car ownership.
2. **Kriengkrai Techakanont, Aksorn Luenyod.** Impact of the Tax Rebate Incentive on the Demand for Automobiles in Thailand.
3. **Holger Bungsche.** Social and economic changes in Japan - a chance for the car market.

10:40 – 11:00

## Coffee break

11:00 – 12:30

## Parallel sessions

### Session 25

Hall I

#### PANEL I

#### Theme 5

Chair: Boleslaw Domanski

1. **Sigfrido Ramirez.** The EU-Japan Trade Negotiations on the Automobile in the 1970s.
2. **Patrick Fridenson.** The European automobile industry and the Japanese challenge: 1973-1992.

### Session 26

Room III

#### Theme 4

Chair: Vincent Frigant

1. **Jun Akabane, Yasuo Tsuchiya, Ryuichiro Inoue, Hajime Yamamoto.** Study on innovation capability of Asian local manufacturing firms.
2. **Yumi Kato, Daniel Arturo Heller.** Transferring Manufacturing Capabilities Up the Supply Chain: Participant-observation research at a third-tier automotive supplier in Japan.
3. **Shahadave Shrestha.** Development of Indian automobile clusters: Role of Japanese FDI (foreign direct investment).

### Session 27

Room IV

#### Theme 2

Chair: Julia Hildermeier

1. **Arturo Lara.** From complex mechanical system to complex electronic system: The case of automobiles.
2. **Roberto Marx, Adriana Marotti de Mello, Mauro Zilbovicius, Felipe Lara.** Diversity of Countries and Companies Strategies: Applying the Multilevel Perspective on Sustainable Transitions to Analyze Alternatives to Dominant Regime.
3. **Carole Donada, Guy Fournier.** The automotive industry faces a paradigm shift.

12:30 – 13:45

## Lunch

13:45 – 15:15

## Parallel sessions

### Session 28

Hall I

PANEL II

Theme 5

Chair: **Sigfrido Ramirez**

1. **Tommso Pardi.** Why Japanese carmakers have been struggling in Europe? Insights from the Nissan's FDI negotiations.
2. **Hitoshi Suzuki.** Margaret Thatcher's diplomacy of launching the Nissan UK factory in Sunderland.
3. **Albrecht Rothacher.** FDI between Japan-Europe in the automobile industry.

### Session 29

Room III

Theme 5

Chair: **Bruce Belzowski**

1. **Kunio Kamiyama.** Development of the emerging automotive markets and the strategies of Japanese automobile companies
2. **Hideo Kobayashi, Yingshan Jin, Martin Schroeder.** Building ASEAN as a global automotive hub.

### Session 30

Room IV

Theme 3

Chair: **Holger Bungsche**

1. **Eugene K. Choi, Heejin Kim.** Reconsidering the Corporate Governance of South Korean Carmakers: The Evolution of Design-Driven Product Architectures.
2. **Giovanni Balcer, Hua Wang, Xavier Richet.** The post-acquisition of Volvo by Zhejiang Geely: Technological catching up, asset-seeking strategies and impact.

15:15 – 15:45

## Coffee break

15:45 – 17:15

## Plenary Session 3

### The Automotive Sector in the EU-Japan FTA/EPA Negotiations

Hall I/II

#### Keynote speech: Lucian Cernat.

**Cernat.** Chief economist - DG Trade - European Commission. **Impact study on the Automobile Industry**

#### Discussant: Anthony Millington.

**Millington.** Director-General, Tokyo Office, European Automobile Manufacturers Association

#### Round table:

**Silviu Jora.** General Manager (EU side), EU-Japan Center for Industrial Cooperation

**Bruno Julien-Malvy.** First Secretary, Trade Section, Delegation of the European Union to Japan

**Anthony Millington.** Director-General, Tokyo Office, European Automobile Manufacturers Association

**Hiroshi Tsukamoto.** General Manager (Japan side), EU-Japan Centre for Industrial Cooperation (former Director General of METI and former President of JETRO)

**Yoshihiro Yano.** Vice President for International Affairs, JAMA

**18:00  
Gala Dinner**

# **GIS GERPISA**

## **Groupement d'Intérêt Scientifique**

### **Ecole Normale Supérieure de Cachan**



#### **MRP (Ministère du Redressement Productif)**

Christophe LEROUGE – Chef du service de l'Industrie à la DGCIS  
Emmanuel CLAUSE – Chargé de mission en charge du développement

#### **MEDDE (Ministère de l'Ecologie, du Développement Durable, et de l'Energie)**

Laurent TAPADINHAS – Directeur de la recherche et de l'innovation au CGDD



#### **CCFA**

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



#### **CNPA**

Patrick BAILLY – Président du CNPA  
Xavier HORENT – Délégué général du CNPA

#### **FIEV**

Claude CHAM – 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 Montesquieu Bordeaux 4**

Manuel TUNON DE LARA – Président de l'Université de Bordeaux  
Vincent FRIGANT – Université de Bordeaux



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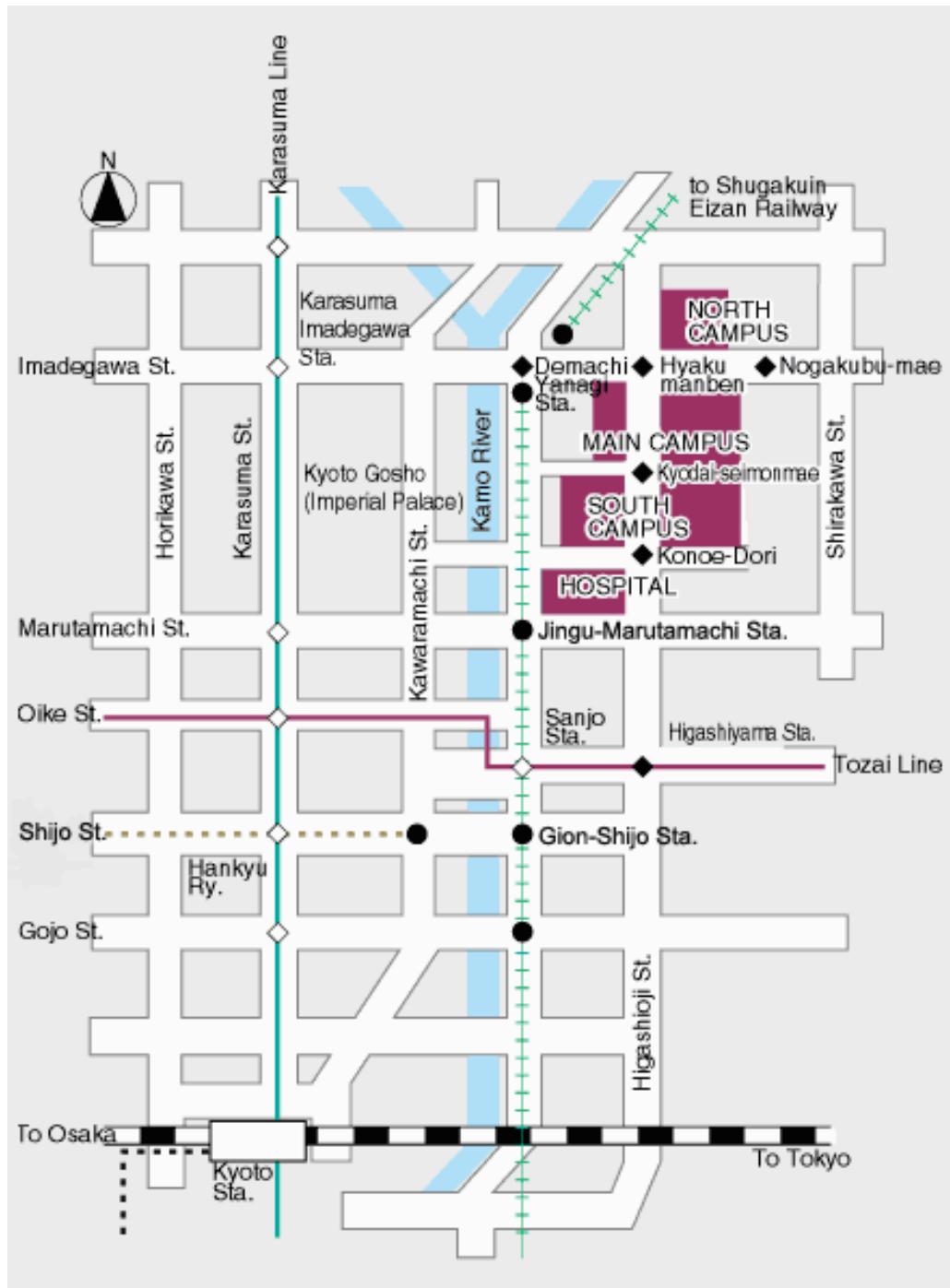
Sébastien Lechevalier – Maître de conférences  
Patrick FRIDENSON – Directeur d'études à l'EHESS

#### **Comité de suivi GERPISA**

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Tommaso PARDI – Directeur-adjoint du Gis Gerpisa  
Stéphane HEIM – Ingénieur de recherche du Gis Gerpisa  
Nathalie LE BRETON – Adjointe financière du Gis Gerpisa  
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Patrick FRIDENSON – EHESS  
Vincent FRIGANT – Université de Bordeaux  
Julia HILDERMEIER – ENS Cachan  
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Marc PLEUVY – CCFA  
Sylvie POMMIER – ENS Cachan  
Sigfrido RAMIREZ – Università Bocconi  
Axel VILLAREAL – Sciences Po Bordeaux



# DIRECTIONS TO THE CONFERENCE



The Yoshida (main) campus is about 40 mins away from Kyoto station and 20 mins from the downtown. To reach it, **we recommend to take a taxi or a bus**:

## I. From JR Kyoto Station

1. Bus #206 bound for Kitaoji via Higashiyama street. Get off at "Kyodai Seimon-mae". 230JPY, 38min.
2. Bus #17 bound for Ginkaku-ji via Kawaramachi street. Get off at "Hyakumanben". 230JPY, 36min.

## II. From Shijo-Kawaramachi (Downtown)

1. Bus #17 or #3 from 'Shijo-Kawaramachi' to 'Hyakumanben'. 230JPY, 14min.
2. Bus #201 from 'Shijo-Kawaramachi' to 'Kyodai seimon-mae'. 230JPY, 22min.



**Gerpisa**

LE RÉSEAU INTERNATIONAL  
DE L'AUTOMOBILE

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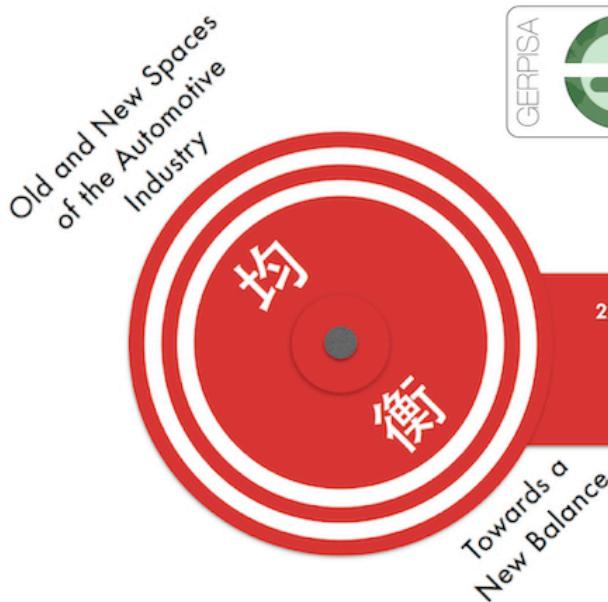
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## 22nd International Colloquium of GERPISA / Old and new spaces of the automotive industry: towards a new balance?



EU-Japan Centre  
for Industrial Cooperation  
日欧産業協力センター



- English
- Français

Gerpisa

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Il y a 1 an 23 semaines

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22nd International Colloquium of GERPISA /  
Old and new spaces of the automotive  
industry: towards a new balance?  
4 Juin 2014 09:00 – 6 Juin 2014 17:00  
Colloque du Gerpisa

Old and new spaces of the automotive  
industry: towards a new balance?  
4 Juin 2014 09:00 – 6 Juin 2014 17:00

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L'ECOLE  
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UNIVERSITÉ MONTESEGQUIEU  
BORDEAUX IV



Comité des Constructeurs Français d'Automobiles

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