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Cars, Carriers of Regionalism?

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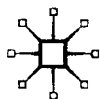
Réseau International

International Network

Groupe d'Étude et de Recherche Permanent sur l'Industrie et les Salariés de l'Automobile

Permanent Group for the Study of the Automobile Industry and its Employees

École des Hautes Etudes en Sciences Sociales, Paris, Université d'Évry-Val d'Essonne



Selection, editorial matter and Chapter 1 © Jorge Carrillo, Yannick Lung and Rob van Tulder 2004

Individual chapters (in order) © Rob van Tulder and Denis Audet; Michel Freyssenet and Yannick Lung; Jean-Bernard Layan and Yannick Lung; Rob van Tulder; Lale Duruiz; Jorge Carrillo; Mariano F. Laplane and Fernando Sarti; Koichi Shimokawa; Jean-Jacques Chanaron; Anthony Black and Samson Muradzikwa; Jean-Bernard Layan and Mihoub Mezouaghi; Rob van Tulder; Marc Lautier; Eric Thun; Yeong-Hyun Kim 2004

Chapter maps © Fabienne Fontanier 2004

Softcover reprint of the hardcover 1st edition 2004 978-1-4039-2144-4

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First published 2004 by
PALGRAVE MACMILLAN

Houndmills, Basingstoke, Hampshire RG21 6XS and
175 Fifth Avenue, New York, N.Y. 10010

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ISBN 978-1-349-51539-4

ISBN 978-0-230-52385-2 (eBook)

DOI 10.1057/9780230523852

This book is printed on paper suitable for recycling and made from fully managed and sustained forest sources.

A catalogue record for this book is available from the British Library.

Library of Congress Cataloging-in-Publication Data

Cars, carriers of regionalism? edited by Jorge Carrillo, Yannick Lung, Rob van Tulder.

p. cm.

"GERPISA Réseau International."

Includes bibliographical references and index.

1. Transportation, Automotive – Case studies. 2. Automobile industry and trade – Case studies. 3. Regionalism – Case studies. I. Carrillo V., Jorge (Carrillo Viveros) II. Lung, Yannick. III. Tulder, Rob van. IV. Groupe d'études et de recherches permanent sur l'industrie et les salariés de l'automobile.

HE5611.C279 2004

338.4'7629222—dc22

2003068747

10 9 8 7 6 5 4 3 2 1
13 12 11 10 09 08 07 06 05 04

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List of Abbreviations

ABEIVA	Associação Brasileira das Empresas Importadoras de Veículos Automotores
ACARA	Asociación de Concesionarias Automotrices dela. República Argentina
ADEFA	Asociación de Fábricas de Automotores
AFTA	ASEAN Free Trade Area; Arab Free Trade Area
AMIA	Asociación Mexicana de la Industria Automotriz
AMU	Arab Maghreb Union
ANFAVEA	Associação Nacional dos Fabricantes de Veículos Automotores
ANZCERTA	Australia–New Zealand Closer Economic Relations Trade Agreement (later: CER)
APEC	Asia Pacific Economic Cooperation
ASEAN	Association of South East Asian Nations
BAFTA	Baltic Free Trade Area
BLNS	Botswana, Lesotho, Namibia, and Swaziland
CACM	Central American Common Market
CARICOM	Caribbean Community
CBU	Completely built up
CCFA	Comité des constructeurs Français d'Automobiles
CEFTA	Central European Free Trade Agreement
CEMAC	Central African Economic and Monetary Union
CIS	Commonwealth of Independent States
CKD	Completely knocked down
CM	Common Market
COMESA	Common Market for Eastern and Southern Africa
CU	Customs Union
DATAINTAL	System of import/export statistics of countries in the Americas, developed by Inter-American Development Bank
DTI	Department of Trade and Industry
EAC	East African Cooperation
EC	European Communities/European Commission
ECCAS	Economic Community of Central African States
ECOWAS	Economic Community of Western African States
EEA	European Economic Area
EFTA	European Free Trade Association
EIU	Economic Intelligence Unit
EMU	Economic and Monetary Union
EPU	Economic and Political Union

ERM	Emerging Regional Market
EU	European Union
FTA	Free Trade Area
FTAA	Free Trade Area of the Americas
GATT	General Agreement on Tariffs and Trade
GCC	Gulf Cooperation Council
IPM	Integrated Peripheral Market
JRI	Japanese Research Institute
KAMA	Korean Automobiles Manufacturers Association
LAIA	Latin American Integration Association
MERCOSUR	Southern Common Market
MIDP	Motor Industry Development Programme
MRU	Mano River Union
MTAZ	Motor Trade Association of Zimbabwe
NAAMSA	National Association of Automobile Manufacturers of South Africa
NAFTA	North American Free Trade Agreement
OE	Original Equipment
OECD	Organisation for Economic Co-operation and Development
OICA	Organisation Internationale des Constructeurs Automobiles
PAM	Protected Autonomous Market
PARTA	Pacific Regional Trade Agreement
PCU	Partial Customs Union
PTA	Preferential Trade Agreement
RIA	Regional Integration Agreement
RTA	Regional Trade Agreement
SAARC	South Asian Association for Regional Cooperation
SACU	Southern African Customs Union
SADC	Southern African Development Community
SAPTA	South Asian Free Trade Area
SKD	Semi-knocked down
TAFTA	Transatlantic Free Trade Agreement
UNCTAD	United Nations Conference on Trade Aid and Development
WAEMU	West African Economic and Monetary Union
WTO	World Trade Organization

Foreword

Over the next few decades will 'lean production', and a generalized deregulation of trade, have become the norms for the international environment in which firms and political and economic spaces will be operating?

The GERPISA Group, a French-based permanent research network devoted to the study of the automobile industry and its labour force, has been transformed into an international network of researchers whose backgrounds cover a wide range of social sciences (economics, business, history, sociology, geography and political science). From 1993 to 1996, the GERPISA Group carried out its initial international programme 'The Emergence of New Industrial Models', a project in which it examined whether existing industrial models were effectively starting to converge towards the principles of 'lean production' – as had been theorized by MIT's IMVP (International Motor Vehicle Program) team. By focusing on what was happening in the automobile industry, the GERPISA Group's work was able to demonstrate the great diversity, and divergence, of the trajectories that firms have been following in recent times. Examples have been the wide spectrum of product policies; of productive organizations and labour relations; and the hybridization of production systems in the new areas towards which firms have been expanding. At the time of writing, there is no 'one best way' – there never has been, and there probably never will be. In fact, the first GERPISA research project made it possible to identify and characterize not one, but three industrial models, all of which have been in operation since the 1970s: the Toyotaist model; the Hondian model; and the Sloanian model (epitomized today by Volkswagen, not GM). The reasoning behind this conclusion is presented and discussed in the four collective books produced by the four working groups, which represent different elements of the integrated project: M. Freyssenet, A. Mair, K. Shimizu and G. Volpato (eds), *One Best Way? Trajectories and Industrial Models of the World's Automobile Producers* (Oxford and New York: Oxford University Press, 1998); R. Boyer, E. Charron, U. Jürgens and S. Tolliday (eds), *Between Imitation and Innovation: the Transfer and Hybridization of Productive Models in the International Automobile Industry* (Oxford and New York: Oxford University Press, 1998); J.P. Durand, P. Stewart and J.- J. Castillo (eds), *Teamwork in the Automobile Industry: Radical Change or Passing Fashion?* (London: Macmillan, 1999); and Y. Lung, J.- J. Chanaron, T. Fujimoto and D. Raff (eds), *Coping with Variety: Product Variety and Production Organization in the World Automobile Industry* (Aldershot: Ashgate, 1999).

This made it possible to construct theories to explain the processes that had led to this multiplicity of models. Companies follow different profit

strategies – their attempts to increase their profitability cause them to favour certain policy combinations over others (for example, volume and diversity, quality, innovation and flexibility, the permanent reduction of costs, volumes, and so on). However, in order to be efficient, all of these strategies have to fit in with the environments in which they are to be applied – especially with respect to the modes of income growth and distribution that are being practised in the areas under consideration. Moreover, to form a ‘productive model’, developed from a ‘company government compromise’ between the main parties (the shareholders, management, unions, workforce and suppliers), the strategies need to be implemented coherently. This analytical framework is presented in R. Boyer and M. Freyssenet, *The Productive Models: the Conditions of Profitability* (London and New York: Palgrave, 2002).

From 1997 to 1999, GERPISA realized a second international programme ‘The Automobile Industry: Between Globalization and Regionalization’. This project tested the thesis that globalization is an imperative for corporate profitability; and that it is the inevitable consequence of the deregulation of trade in the aforementioned ‘new’ areas. This was a logical extension to the first programme, given that ‘lean production’ was considered to be the most suitable model for markets that are variable and diversified, and ostensibly moving towards a single global standard. Firms are establishing themselves across the whole world; new industrialized nations are emerging, as a result of their having opened up to international trade; and more recently, certain automakers have been at the heart of some mega-mergers. All of these events have supported the thesis of globalization, a process supposedly galvanized by the fact that companies, in their efforts to benefit from economies of scale, and from improved costs structures, are continually increasing their organizational integration, and are doing this on an ever-greater geographical scale. The commercial opening of the new areas, which some expect to create a homogenization of demand, is also deemed to contribute to this process.

A previous study (J. Humphrey, Y. Leclerc and M.S. Salerno (eds), *Global Strategies and Local Realities: the Auto Industry in Emerging Markets* (London: Macmillan/New York: St Martin’s Press, 2000)) constituted a first attempt to put this hypothesis to the test, and it did so by focusing on the situation in the emerging countries. The main objective was to scrutinize a concept that is being presented now as if it were self-explanatory: economic globalization. The authors who collaborated had all emphasized the diversity of the productive and spatial configurations that can be observed in the emerging countries.

This book analyses the process of regionalization of the auto industry in different areas of the world (industrialized and developing countries), considering the geographical level at which supply and demand in the auto industry get coupled, such ‘automobile spaces’ could be national (Japan),

regional (EU or MERCOSUR) or still in balance (Russia/CIS). Two companion books aim to carry out a systematic description and analysis of the trajectories of internationalization that are being followed by the various types of firms involved in the American, Asian and European automobile industry (manufacturers, suppliers and dealers): M. Freyssenet, K. Shimizu and G. Volpato (eds), *Globalization or Regionalization of the American and Asian Car Industry?*; and, M. Freyssenet, K. Shimizu and G. Volpato (eds), *Globalization or Regionalization of the European Car Industry?* (London and New York: Palgrave, 2003). These studies identify and characterize the different processes of periodic re-heterogenization, and the conditions that are necessary if firms, and areas, are to be successful. Moreover, within this perspective, they will be particularly keen to analyse the steps being taken to allow firms' and areas' trajectories to be adjusted and hybridized – actions which in all probability will require considerable strategic and organizational inventiveness. A last book from the second GERPISA programme focuses in particular on the form and character of the internationalization of employment relationships in the automotive industry (E. Charron and P. Stewart (eds), *Work and Employment Relations in the Automobile Industry* (London/New York: Palgrave, 2004)).

GERPISA's books are not only the result of the work done by their contributors, and by the editors who have assembled and organized them. Through their participation in the international meetings, and in annual symposiums, the members of the programme's international steering committee, and the other members of the network, have contributed in varying degrees to the discussions, and to the general thought process. In addition, the books would have never seen the light of day had it not been for GERPISA's administrative staff, who take care of all of the tasks that are part of the daily life of an international network. We thank them all.

MICHEL FREYSSENET and YANNICK LUNG

*Scientific co-ordinators of the GERPISA programme entitled
'The Automobile Industry between Globalization and Regionalization'*

Appendix: the GERPISA International Network

The GERPISA (the Permanent Group for the Study of and Research into the Automobile Industry and its Employees) started out as a network of French economics, management, history and sociology researchers who were interested in the automobile industry. Founded by Michel Freyssenet (CNRS sociologist) and Patrick Fridenson (EHESS historian), it was transformed into an international network in 1992 in order to carry out the research programme 'Emergence of new industrial models'.

With Robert Boyer (CEPREMAP, CNRS, EHESS economist) and Michel Freyssenet supervising its scientific orientations and under the management of an international committee, the programme (1993–6) made it possible, thanks to its study of the

automobile firms' (and their transplants') trajectories, productive organization and employment relationships, to demonstrate that *lean production*, which according to the authors of *The Machine that Changed the World* (Womack, Jones and Roos) was to become the industrial model of the twenty-first century, was in fact an inaccurate amalgamation of two completely different productive models, the 'Toyotian' and the 'Hondian'. Moreover, it showed that there are, have always been, and probably always will be several productive models that are capable of performing well at any one time. Shareholders, executives and employees are not only not obliged to adopt a *one best way*, they also have to devise a 'company governance compromise' covering the means that will allow them to implement one of the several profit strategies that are relevant to the economic and social environment in which they find themselves.

A second programme (1997–9) 'The automobile industry: between globalization and regionalization' and supervised and coordinated by Michel Freyssenet and Yannick Lung (Bordeaux, economist), tested the analytical framework that had been developed during the first programme in an attempt to understand better the new wave of automobile manufacturer and component-maker internationalization that had been observed over the previous decade. The outcome was that the viability of the choices being made depends primarily on the chosen profit strategies' compatibility with the growth modes in the areas in which the investments are being made.

The third programme (2000–2) has been developed under Yannick Lung's coordination, with the support of the European Union (CoCKEAS project thematic network, 5th Framework, Key Action 4: HPSE-CT-1999-00022). It focuses on the issues at stake in the 'Co-ordination of knowledge and competencies in the regional automotive systems'. Supplementing existing studies of forms of regionalization in the automobile industry, the programme analyses the sector's new contours as well as the development of new relational and co-operative modes among its actors.

In 2002, the GERPISA comprised 350 members from 27 different countries. Affiliated with the Centre de Recherches Historiques (CRH) of the Ecole des Hautes Etudes en Sciences Sociales (EHESS), and acknowledged as an 'équipe d'accueil' of the Université d'Evry-val d'Essonne by the French Ministry of National Education, it is supported by the French car companies (PSA Peugeot-Citroën and Renault), their professional association (the CCFA), and the European Union.

The international management steering committee comprises the following members: Annie Beretti, Robert Boyer (CNRS-EHESS, Paris), Juan José Castillo (Universidad Complutense, Madrid), Jorge Carrillo (Colegio de la Frontera Norte, Mexico), Jean-Jacques Chanaron (CNRS, Lyon), Elsie Charron (CNRS, Paris), Jean-Pierre Durand (Université d'Evry), Michel Freyssenet (CNRS, Paris), Patrick Fridenson (EHESS, Paris), Takahiro Fujimoto (University of Tokyo), Ulrich Jurgens (WZB, Berlin), Yveline Lecler (MRASH/IAO, Lyon), Yannick Lung (Montesquieu University, Bordeaux), Jean-Claude Monnet (Research Department, Renault), Mario Sergio Salerno (University of Sao Paolo), Koichi Shimizu (University of Okayama), Koichi Shimokawa (Hosei University, Tokyo), Paul Stewart (University of Bristol), Steve Tolliday (University of Leeds), Rob van Tulder (Erasmus University, Rotterdam), Giuseppe Volpato (Ca'Foscari University, Venice) and Karel Williams (Victoria University, Manchester).

GERPISA's publications

GERPISA edits in English and French a quarterly review *Actes du GERPISA* and a monthly newsletter *La Lettre du GERPISA*. The review combines the writings that the network's members have presented on specific topics in various work meetings.

The newsletter comments on news from the automotive world and provides up-to-date information on the network's activities. Findings from the first and second programmes have been published in a series of books:

Programme 'Emergence of new industrial models'

- Freyssenet, M., Mair, A., Shimizu, K. and Volpato, G. (eds) *One Best Way? Trajectories and Industrial Models of the World's Automobile Producers*. Oxford/New York: Oxford University Press, 1998. French translation: *Quel modèle productif? Trajectoires et modèles industriels des constructeurs automobiles mondiaux*. Paris: La Découverte, 2000.
- Boyer, R., Charron, E., Jürgens, U. and Tolliday, S. (eds) *Between Imitation and Innovation: the Transfer and Hybridization of Productive Models in the International Automobile Industry*. Oxford/New York: Oxford University Press, 1998.
- Durand, J.P., Stewart, P. and Castillo, J.- J. (eds) *Teamwork in the Automobile Industry: Radical Change or Passing Fashion*. London: Macmillan, 1999. First edition in French: *L'avenir du travail à la chaîne*. Paris: La Découverte, 1998.
- Lung, Y., Chanaron, J.- J., Fujimoto, T. and Raff, D. (eds) *Coping with Variety: Product Variety and Production Organization in the World Automobile Industry*. Aldershot: Ashgate, 1999.
- Shimizu, K., *Le Toyotisme*. Paris: La Découverte, 1999.
- Boyer, R. and Freyssenet, M., *The Productive Models*. London/New York: Palgrave, 2002. First edition in French: *Les modèles productifs*. Paris: La Découverte, 2000.
- Boyer, R. and Freyssenet, M., *The World that Changed the Machine* (forthcoming).

Programme 'The automobile industry between globalization and regionalization'

- Humphrey, J., Lecler, Y. and Salerno, M. (eds) *Global Strategies and Local Realities: the Auto industry in Emerging Markets*. London: Macmillan/New York: St Martin's Press, 2000.
- Freyssenet, M., Shimizu, K. and Volpato, G. (eds) *Globalization or Regionalization of the American and Asian Car Industry?* London/New York: Palgrave Macmillan, 2003.
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- Carillo, J., Lung, Y. and Tolder, R. van (eds), *Cars, Carriers of Regionalism?* London/New York: Palgrave Macmillan, 2004.

Programme 'Co-ordination of knowledge and competencies in the regional automotive systems'

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