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Editorial  
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## ROVER : LA FIN DE CERTAINES ILLUSIONS

Si la déconfiture de Rover n'est pas une surprise, elle sonne le glas de certaines illusions dont on relèvera quelques unes, notamment celles que véhicule une représentation des dites « bonnes pratiques » dans le capitalisme contemporain :

- ✓ il ne suffit pas de démultiplier les alliances pour résister dans une industrie mondialisée où les effets de dimension sont essentiels. Une base productive consolidée propre est indispensable et il n'y a pas de place pour la « firme creuse » (hollow corporation) car courir après tous les partenaires éventuels ne résout rien ;
- ✓ la gestion de Rover par les formes les plus modernes du capitalisme semble avoir enrichi certains, pas la communauté ;
- ✓ économie exemplaire du *capitalisme anglo-saxon* en Europe, la Grande-Bretagne perd son dernier fleuron indépendant et l'industrie automobile britannique est entièrement contrôlée par les multinationales étrangères.

Si l'on se tourne du côté nord-américain, Chrysler étant passé sous le contrôle de Daimler, il ne reste plus que General Motors et Ford qui sont confrontés actuellement à de sérieuses difficultés. Il semble que s'il est favorable aux biotechnologies ou aux TIC, le *capitalisme libéral de marché* ou *capitalisme anglo-saxon* ne soit pas aujourd'hui un environnement institutionnel propice à l'industrie automobile. Quel contraste avec la vigueur retrouvée des constructeurs fleurons du *capitalisme asiatique* parfois qualifié de *méso-corporatiste*, qu'ils soient japonais, coréens et maintenant chinois !

S'agit-il d'un effet conjoncturel ou du jeu des contraintes structurelles ? Sont-ce les nouvelles configurations de l'industrie automobile qui s'accordent mieux avec les formes institutionnelles qui caractérisent ces économies ou bien les stratégies de profit mises en œuvre par les constructeurs qui sont en phase avec les opportunités offertes ?

## ROVER: THE END OF CERTAIN ILLUSIONS

Rover's downfall, although unsurprising, tolls the bell for certain illusions, notably for the ideas conveyed by one representation of so-called "best practices" in modern capitalism:

- ✓ For a firm to survive in a globalised industry dominated by size effects, it is no longer enough for it to simply arrange a whole network of alliances. Companies must have their own consolidated productive base, i.e., there is no room for "hollow corporations". Running after potential partners isn't a solution;
- ✓ Rover's management practices, which implemented capitalism's most modern forms, seem to have enriched certain individuals, but not the community as a whole;
- ✓ Great Britain, Europe's textbook *Anglo-Saxon capitalist* economy, has lost its last independent champion. The entire British automobile industry is now under the control of foreign multinationals.

If we look at what has been happening in North America, with Chrysler having been taken over by Daimler only General Motors and Ford are left, and they are in deep trouble. A *liberal market economy* or *Anglo-Saxon capitalism* may be conducive to biotechnologies or ICT, but it does not seem to constitute a suitable institutional environment for the automobile industry. What a contrast with the renewed vigor of the champions of *Asian capitalism* (sometimes described as the *meso-corporatist* variant), be they Japanese, Korean and nowadays even Chinese!

Are we witnessing a cyclical effect or the aftermath of certain structural constraints? Are the automobile industry's new configurations a better fit with the institutional forms that characterized the aforementioned economies, or are their manufacturers' profit strategies more in tune with the opportunities on offer?

C'est à apporter des éléments de réponse à ce type de questions qu'est consacrée le quatrième programme de recherche international du GERPISA et dont nous discuterons lors des débats de la prochaine rencontre en juin à Paris.

GERPISA's fourth international research programme will concentrate on answering these types of questions, which we will debate at our June meeting in Paris.

## Questions de recherche – Research questions

*Olivier Hirt*

### STRUCTURING OF THE PLURALITY OF APPROACHES OF SOCIO-ECONOMIC MODELS WITHIN THE 4TH PROGRAMME

#### INSTITUTIONAL CONFIGURATIONS, CHANGE AND COLLECTIVE ACTION PROCESSES

One stake of the 4<sup>th</sup> programme lies in the production of new empirical knowledge and elements of characterisation of socio-economic models of the countries and areas which will be studied. But a second one is the refinement of our modes of capturing and analytical frameworks of socio-economic models. If a general framework has been roughed out during the design phase of the project, it is one of the programme axes to pursue its drawing up, and the discussions in the first period of the programme allow to better figure out the different approaches to be mobilized in the contributions, their possible structuring, and points of discussion between them.

These approaches share the project of an analysis of socio-economic models and their change dynamics based on a characterisation of their institutional configurations, integrating the macro, meso and micro levels, and aiming at evaluating their consistency (i.e. the way in which a combination of institutions within a same model, do or not favour the viability or the performance of the model with regard to one or another given criterion), and the impact of ongoing or foreseen directions of change on this consistency.

Yet, they present a number of differences in the way they capture and model the institutions, as regards the methods, the viability or performance criteria of a model, and the dimensions of reality they consider.

The approach proposed by Michel Freyssenet<sup>1</sup> is in keeping with the works and frameworks of the GERPISA. It consists, firstly, in carrying on in-depth studies and analysis of single cases, prioritizing qualitative tools, and stressing the importance of history and trajectories analysis as means to understand the significance of a configuration or of apparent correlations. Then, typologies may be roughed out by regroupings of these single cases, thoroughly studied. Following the scheme of the Productive Models theory, where a model is considered viable when it allows the implementation (stable / lasting along a given period) by a firm of a given profit strategy, M. Freyssenet proposes to tackle the ana-

lysis of socio-economic models with considering viable a model in which a "societal model" (institutional configuration at the macro level) allows the implementation (stable for a given period), in a single country, of a given "growth strategy", and with aiming at understanding the institutional configurations from that angle.<sup>2</sup> The choice of the "permissiveness to the implementation a growth strategy" as the criterion of viability of a socio-economic model is justified by M. Freyssenet putting forward that, when wanting to address developed economies, the requirement of growth appears as a reasonable hypothesis.

Compared to this approach, the one developed by Bruno Amable and Stefano Palombarini<sup>3</sup> especially insists on taking into consideration the political dimension of the stability or the viability of a socio-economic model. The methods used by B. Amable and S. Palombarini – quantitative analysis on macro variables – hardly allow to analyse the configurations in a way as much precise and thorough as qualitative methods and history, or to buttress so much solidly the hypothesis founded on apparent correlations ; but they present the advantage to permit, with less resources and time, to extend the analysis to a scope of institutional areas and a number of countries broader than with more qualitative methods. But the main specificity of their approach lies in the consideration that the criterion of viability of a socio-economic model is the regulation - or stability - of the social conflict ("that a social organisation generates and which structure it"<sup>4</sup>). A socio-economic model is viable until the socio-political compromise - depending on battle of wills between "social blocks", supporting a political coalition in power, and encompassing relations of domination – remain stable.

<sup>1</sup> Freyssenet M., 2004, "To pursue the macro-micro links analysis, discussing the both notions : "growth mode" and "productive model", GERPISA Letter 179, November 2004. (French version in Letter 178).

<sup>2</sup> The notion of « societal model » underlines the consideration of the existence, within national institutional configurations, of other types of social relations than the capital-labour relation (e.g. market, associative, domestic relations...). The working out of this notion (how to characterise a "societal model" ?) is one of the work axes, while the way of modelling the firm / micro level is provided by the Productive Models theory.

<sup>3</sup> Amable B. and Palombarini S., 2004, "Une approche néo-réaliste de l'économie politique", 12th GERPISA International Colloquium, Paris, June 9-11th 2004 ; Amable B. and Palombarini S., 2005, "L'économie politique n'est pas une science morale", Paris, Liber - Raisons d'agir.

<sup>4</sup> Our translation.

The interest of this consideration is to depart from normative visions of economics, the viability or performance of a model relating not any more to a criterion chosen “from the outside” by the economist, but being here dependent on collective action – captured in this case from the angle of the relations of interests, battle of wills and domination between the actors. But hence, to analyse a socio-economic model and to evaluate its viability do not only imply to analyse the institutional configurations, but also requires to consider socio-political configurations as an object of analysis : the relations between the social blocks, their evolutions and reconfigurations according to political evolutions and institutional changes, and their role in these change dynamics.

A number of other approaches mobilised by other contributors to the project are also oriented towards a better capturing of change and collective action processes – processes of construction and revision of compromises, in the GERPISA’s language -, some of them paying attention to a second dimension of these processes, generally termed cognitive : the dimension of the transformations of values, representations and knowledge, embedded in change processes. The frameworks developed by C. Baron and A. Isla<sup>5</sup> (to study regulations forms of public utilities in Europe) and by the CGS<sup>6</sup> (on the new management models for innovative design regimes) will privileged this second dimension. The ones drawn up by B. Jullien and A. Smith (for an analysis of micro - macro relations based on an entry at the meso / sector level), the SAPAI group<sup>7</sup> (on the relations between the automobile industry, the State and political institutions at other levels), or the GRES<sup>8</sup> on the one hand and the CRESC<sup>9</sup> on the other for addressing financialisation, will give a place two these two aspects of change and collective action processes. Within the framework of the programme, it is almost easy to see how it will be possible to hang these heterogeneous together, for them to contribute to a characterisation of socio-economic models and of their transformations, and to an evaluation of the impact of ongoing or foreseen change directions on each model (compatibility with the model, enhancing or weakening of its consistency, change of model, etc.). We can also see how the different approaches may participate, through our discussions, to the development of a framework allowing a better capture of institutions, institutional configurations and change mechanisms (considering these three aspects : modelling and characterisation of institutional configurations, of processes of change and collective action on their political dimension, and of these processes on their “cognitive” dimension).<sup>10</sup>

<sup>5</sup> GRES (universities of Bordeaux 4 and Toulouse 1).

<sup>6</sup> Ecole des Mines de Paris. Participation to the programme led by B. Weil. Also see the text by B. Segrestin in this issue.

<sup>7</sup> States and Politics in the Automobile Industry, internal work group of the GERPISA led by T. Pardi and S. Ramirez.

<sup>8</sup> C. Dupuy and S. Lavigne ; G. Colletis, F. Morin and E. Pineault.

<sup>9</sup> K. Williams, I. Erturk, J. Froud, S. Johal and A. Leaver, University of Manchester.

<sup>10</sup> The three aspects being present in all the approaches, but at various degrees and in different forms.

However, it is also obvious that a specific effort will have to be paid to organise the complementarity between the studies and the discussion between the approaches: complementarity of research issues and of fieldwork, cross-utilisation of the different approaches, relaunch of research based on the first results of every contributor, theoretical development work.

It must also be emphasized that evaluating the consistency of a socio-economic model, with considering as its viability criterion whether the “permissiveness to a growth strategy”, or the stability or regulation of the socio-political compromise, is not the same question, and refers, in the framework of the programme, to a double logic of structuring and of use of the contributions. (We may consider the two perspectives as two parts of our collective response, or see any of them as a possible contribution to the other, or choose to pursue the discussion between them within the project ; but on condition that we make a sufficient analysis and structuring effort).

This clarification of the set of approaches mobilised in the programme allow to better reaffirm the its specificities in the fields of analysis of socio-economic models and of industrial models. In the first one,<sup>11</sup> if we aim at departing from the vision of a standard viable model, we shall also stay apart from approaches in terms of “variety of capitalism” whether relating to dichotomies (e.g. opposing coordinated market economies and liberal market economies,<sup>12</sup> or consisting in models or types specific to single cases. Between the two, our objective is clearly to identify the criteria of a typology restoring a variety, but accounting for identities and proximities of the configurations. In the field of industrial models analysis,<sup>13</sup> our goal is to develop the modelling of the relation between productive models and the configurations of socio-economic models at the macro level. The stake, here, is to find the “right” criteria, and the “right” modes of structuring between configurations at the micro, meso and macro levels, permitting to account for a diversity of possible productive models within diverse capitalisms. (Or, to put it differently, to account for a variety of possible combinations between diverse productive models and various models of capitalism). This direction differs both from visions postulating a unique viable industrial model (“one best way”) associated to a standard viable economic model, and from “isomorphic” theories allowing variety but associating to each type of capitalism a unique type of viable industrial model.<sup>14</sup>

<sup>11</sup> Referring to the review of literature on “variety of capitalism” presented by B. Amable at the ESEMK Steering Committee meeting, Paris, April 8<sup>th</sup> 2005.

<sup>12</sup> Hall P.A. et Soskice D. (eds.), 2001, “*Varieties of Capitalism. The Institutional Foundations of Comparative Advantage*”, Oxford University Press.

<sup>13</sup> Referring to the state-of-art on “diversity of capitalism within variety of capitalism” outlined by Y. Lung, ESEMK Steering Committee, Paris, April 8<sup>th</sup> 2005.

<sup>14</sup> e.g. Aoki’s “firm A” and “firm J”.

## “Capitalisms in transition” of Central and Eastern European Countries

As part of progresses in these directions, the workshop on Central and Eastern European Countries provided us with a couple of elements about the socio-economic models of these countries, and the existing work on it in terms of variety of capitalism<sup>15</sup>. There is still a few number of studies of CEECs, adopting a “variety of capitalism” approach<sup>16</sup>. An exploratory analysis of three countries (Czech Republic, Hungary, Poland) realised by J.-P. Berrou, C. Carrincazeaux and Y. Lung, on the same variables used by B. Amable<sup>17</sup> exhibit a proximity among their institutional configurations, and would tend to formulate the hypothesis of the existence of a specific type of capitalism characterising these countries. Of course, this exploratory result would have to be completed by more thorough studies : is this apparent proximity supposed to last, or is it rather the effect of a common situation of transition from the communist period to an open market economy ? Does it reveal homogeneities of situations and of transition trajectories, or does it rather hide a diversity or an eventual divergence of the trajectories to reveal later on ?

The comparison between Poland and Ukraine presented by Vlad Mykhnenko,<sup>18</sup> also based on B. Amable grid in terms of “diversity of capitalism”, and characterising each of the two countries in five institutional areas (product market competition, labour market, financial sector, social protection, education), confirms a certain specificity of these two countries with regard to the five types of capitalism identified by B. Amable. The models of Poland and Ukraine share an incomplete institutional complementarity, and an underdevelopment of financial and capital markets. For all that, V. Mykhnenko says, these characteristics rather are common to all emergent economies, than incline to postulate the existence of a type of capitalism specific to CEECs. As a matter of fact, beyond these common traits, the analysis of Poland and Ukraine tend to support the hypothesis of a diversity of models of “post-communist capitalism”, with divergent transition trajectories, from communist economy to probably several different models. The contribution by Bela Greskovits<sup>19</sup> also consider this diversity, and attempts to give an explanation of it based on the types of industrial specialisation of the countries.

<sup>15</sup> If the available resources and time for the programme hardly allow to carry on in-depth studies on CEECs, there is no doubt that an analysis of forms of capitalism and industrial models, with as its horizon the question of the convergence towards a European model, could not leave aside these countries. Therefore, the aim of the workshop held in Paris on March 4<sup>th</sup> 2005 was to get a first insight into the analysis of their models.

<sup>16</sup> Referring to the B. Amable and J. Schumacher review of literature on CEECs, ESEMK Steering Committee, Paris, April 8<sup>th</sup> 2005.

<sup>17</sup> Amable B., 2004, “The Diversity of Modern Capitalism”, Oxford University Press; Amable B., 2005, “Les cinq capitalismes. Diversité des systèmes économiques et sociaux dans la mondialisation”, Paris, Seuil.

<sup>18</sup> University of Glasgow. Guest speaker at the Paris workshop.

<sup>19</sup> Central European University, Budapest. Guest speaker at the workshop.

B. Greskovits distinguishes four types of sectors, depending on the two criteria of “physical capital intensity” and “intellectual capital intensity”. He observes that foreign investments and economic development have been more important, since the 90’s, in the countries where industrial sectors relating to the “heavy-complex” type<sup>20</sup> (among which the automobile industry) are dominant. According to B. Greskovits, this analytical grid seems at least more relevant than the main criteria considered by OECD for example, to explain the divergences between the countries, being the degree of adoption of the recommended economical standards. Regarding the reasons for these differences between national industrial specialisations, for B. Greskovits, they mainly relate to the traditions and trajectory of each country (already existing industries, competences, etc.) and to the existing relations with western countries. If similarities exist between certain CEECs and certain western countries regarding industrial specialisation, connections have to be made cautiously as the institutional configurations in a number of areas – employment relationship, work organisation, etc. - remain different. In point of fact, with regard to the approach of our programme, these first elements on CEECs models would usefully be completed an analysis of the macro configurations of the countries, and by more detailed studies of firms productive models and profit strategies, in order to confirm or discuss the results stemmed from B. Greskovits typology.

## Research agenda on financialisation

The plurality of the approaches mobilised in the programme is also present in the research agenda on financialisation<sup>21</sup>. One of the axes of this work is precisely to better define the possible approaches to tackle financialisation. The two contributions presented by the GRES and the CRESC<sup>22</sup> teams insist on considering financialisation not as an autonomous phenomenon, but as a “social fact” linked to different spheres, not only the economical one.

For what relates to configurations analysis, work have been presented on two themes : evolution of the share of financial activities within the activities of the firms, and the evolution of the respective shares of the different types of savings (deposits, mutual funds, insurance, etc.) with regard to the total, in different countries. The work on the first theme, presented by A. Leaver, shows the increasing importance of the share of financial activities at Ford. This may be interpreted, following the Manchester way, as a spiralling out of control, under the influence of the financialisation “narrative”.

<sup>20</sup> Intensive physical capital (heavy) and intensive intellectual capital (complex) activities.

<sup>21</sup> Presented at the workshop on the ESEMK work package 3 (financialisation), Manchester, February 17-18th 2005.

<sup>22</sup> GRES (universities of Bordeaux 4 and Toulouse 1) : G. Colletis and F. Morin, with E. Pineault (University of Québec in Montréal). CRESC (University of Manchester): I. Erturk, J. Froud, S. Johal, A. Leaver and K. Williams.

But we could also try to see if this situation would not result from weaknesses of Ford's product policies and distribution organisation over the recent period. On the second theme, work presented by the GRES on the one hand, and by the CRESC on the other,<sup>23</sup> each of them considering a panel of four European countries, shows an increasing in the share of speculative investments, compared to classical savings, being in terms of the share of each type of actor - banks, funds, insurances, etc. - (GRES) as well as in terms of the composition of households assets (CRESC). The two studies exhibit divergences between countries, but consider difficult to work out a typology, divergences being not stable depending on time periods, and having rather to be linked to national trajectories and actors behaviours in each country. Roles and behaviours of the same types of actors (banks, mutual funds, hedge funds, etc.) differs from country to country; and these considerations regarding the financial sphere should also have to be connected to specificities and evolution in other areas: firms financing modes ; firms internationalisation strategies ; national industrial, financial and tax policies ; changes in pension systems ; national relations between state, industrial and financial actors, etc.

<sup>23</sup> GRES : C. Dupuy and S. Lavigne. CRESC: I. Erturk, J. Froud and K. Williams, with S. Solari (University of Padova).

Last, one of the axes on financialisation will also address the change and collective action mechanisms, by looking at the evolutions of actors that go with financialisation : new figures of shareholders, new financial actors (venture capital, hedge funds, etc.), new figures of "elites", new relations between these new actors and industrial sectors, etc. (For example, in France, shift from an industrial and financial elite close to the State and Civil Service, trained in the "Grandes Ecoles" and moving around public and private sectors, to new elites trained in business schools or abroad, moving in changing networks rather than in a stable order).

The variety and scope of the studies stress the importance of the specific work to be done to structure the coordination of the contributions and the consistency of the results. Efforts in this sense have been done recently at the workshop on product policies and productive organisations<sup>24</sup> and should continue at the June meetings and GERPISA colloquium in Paris.

<sup>24</sup> Workshop on ESEMK work package 5 (product policy and productive organisation), Bordeaux, May 12-13th 2005.

## Débats - Debates

### THE RENAULT-NISSAN ALLIANCE, OR HOW TO MANAGE EXPLORATORY PARTNERSHIPS?<sup>1</sup>

Blanche Ségrestin<sup>2</sup>

Today, inter-firm cooperation is a growing concern among firms but in the automotive sector, many mergers encountered major problems.<sup>3</sup>

Just a few years after the Renault-Nissan alliance has been set up, the two brands have however succeeded in reinforcing their position, developing a number of joint projects, but also creating a number of institutional entities for strategic command and operational coordination still preserving their own identities. Considering both the major economic crises Nissan was going through in 1999 and the former experience of Renault with Volvo, the building of a new collective entity raises several questions (Boyer and Freyssenet, 2000).

We have had the opportunity of observing the cooperative process from the inside when we carried out an in-depth analysis of the development of the first joint platform from October 1999 to December 2000.

<sup>1</sup> For an extended version, see (Ségrestin, 2005)

<sup>2</sup> CGS, Ecole des Mines de Paris, 60 boulevard Saint Michel, 75006 Paris, blanche.segrestin@ensmp.fr

<sup>3</sup> See for instance Renault's previous attempts (Bruner and Spekman, 1998) DaimlerChrysler (Waller, 2001),...

Following former interpretation of inter-firm cooperations as iterative processes of revision of initial conditions that enable mutual learning and, consequently, convergence (Doz, 1996, Doz and Hamel, 1998), what is at issue is the scope of both the revision and the devices required to guide these dynamics effectively. This leads us to consider the platform development as an *exploratory partnership* and not as a project development (Segrestin, 2003, Segrestin, 2005).

As we shall see, the aim of this first initiative was actually twofold: the first dimension was to build common purpose and to explore the potential synergies of the alliance (we will term this dimension the *coordination* (Mintzberg, 1981)). The second dimension was to create the conditions of possibility for collective action by building a system of legitimacy which enables partners to agree on common purposes and on the rules governing them, however open-ended they might be (we will term this dimension the *cohesion* (Barnard, 1968, Laufer, 2000)). Whereas most of the time, collective identity and/or common goals are well-defined in advance, the Renault-Nissan alliance constituted a special configuration as neither governance structure nor joint projects were determined in advance.

We argue that the role of the management was substantial in monitoring both these design processes.

## A first platform development as a vehicle to explore synergies

The idea of developing a common platform was challenging as the relationship between the two manufacturers was rather ambiguous in 1999: they were still competitors in world markets, Renault was the owner of Nissan and, at the same time, the two manufacturers had set up the Alliance to support common projects. Implementing a strategy of common platform was however natural to pave the way for substantial economies in the development costs, industrial equipment and diversity (Cusumano and Nobeoka, 1998). It was also a way to explore synergies and to preserve brand identity and vehicle diversity. Yet, the potential challenges inherent of such a project were legion.

Indeed, its viability and feasibility could by no means be taken for granted and had yet to be demonstrated. In these conditions, both organizational principles and requirements were limited in scope:

- ✓ In organizational terms, work was to be coordinated among distant teams, which had their own methods, planning schedules and rules. Merging the teams was not an option. Both manufacturers wanted to maintain their autonomy and the Alliance was still too unstable to sustain a rapid process of integration. It was decided to share the work in a way that fit in with the schedules of both companies. Since the first components were set to be produced in Japan, it was decided that Nissan should be responsible for developing the world-wide shared components program. Meanwhile, Renault would be responsible for the shared components program for markets in Europe.
- ✓ In terms of functional requirements for shared components, the platform had to support distinct projects; it had to be a means rather than an end. Therefore, any shared component would have to meet simultaneously the requirements of each and every one of the platform's vehicles. Such a stipulation generated major challenges from a design point of view: the specifications of the different vehicles were likely to be contradictory. Accommodating this raft of constraints called for an innovative design.

But this was only one of the challenges that the platform had to face. Obviously, the constraints were only partly known since the other vehicles had not yet been designed. An examination of the difficulties that arose led us to isolate three main coordination problems:

- ✓ Preconditions for commonality had to be thoroughly examined: what does common development require in terms of resources and is it appropriate to the different environments?
- ✓ Even when an agreement is reached on the functional specifications to be met, there can be divergences in the way that this should be achieved as validation procedures can be specific to individual manufacturers.
- ✓ As design studies progress, differences in the nature of the work required to develop various components became apparent. In some cases, two manufacturers were working together; for other components, a num-

ber of innovative technical solutions were developed and both manufacturers wanted to develop the components separately so that they could assimilate the new technology more efficiently.

## Exploring common purpose and interests

In other words, the decision to manufacture a shared component could not be taken upstream, but only after sufficient information and experience had been derived from learning processes. However, divergent points of view could emerge and call into question shared technical solutions, the apportionment of tasks, or even the economic viability of specific collaborative projects. In this last case, and if a shared component were to be dropped from the shared platform, then not only would the physical parameters of the platform evolve, but so too would those of the actors involved.

In this respect, the Alliance could be seen as a means of avoiding having to define the governance structure prematurely: instead of focusing on mutual safeguards, the manufacturers were free to explore potential synergies and possible joint projects. As long as there was no formal commitment, both manufacturers could refrain from collaboration if the threat of opportunism outweighed expectations concerning benefits. The mere fact that one or other manufacturer backed out of certain specific components implied neither the failure nor the end of the collaborative process. In fact, the decision to put an end to collaboration on specific projects can result either in joint development, in the termination of the relationship, or in new forms of cooperation based on research questions based further upstream.

## Two simultaneous design processes

The Renault-Nissan joint platform development clearly differs from traditional projects (Hatchuel *and al.*, 2001) in that its scope, its specifications, and the areas of expertise required were not identified in advance. On the contrary, they were generated by the process of collaboration, whose purpose was to define them. Indeed, the way in which the collaboration developed is characterised by two different but tightly interrelated design processes, which specify and expand the joint platforms and the collective identity<sup>4</sup>: on the coordination level, collaboration results in the specification of common projects, but also in addressing a number of problems that could not have been solved within the parameters of the original development platform. Management was responsible for modifying the scope of the common platform and of job sharing decision-making procedures as and when the legitimacy of the collaboration was affected by its various evolutions.

<sup>4</sup> As recent design theories suggest, design activities work through "expandable rationality", but enriching initial concepts by adding new attributes and specifications (Hatchuel, 2001). It is important to outline that, as Hatchuel argues, relationship dynamics and learning processes cannot be considered separately (Hatchuel, 1996).

The learning process was further stimulated by defining the risk of either party backing out of specific joint projects downstream and by comparing methods, standards and validation protocols. In this respect, we interpret the platform development as a means of exploring potential common interests, and identifying potentials for shared learning experiences and new (research) projects that could be of benefit to both manufacturers.

On the cohesion level, cooperation also contributed to defining both the group and its potential common interests by delimiting the scope of viable common projects that could continue only if it continued to serve the interests of both parties. Management had to adapt the cohesion factor in line with the progress of the studies. For instance, while there was no mutual liability in the early stages of cooperation, the process has, naturally, given rise to areas of conflict. After long and expensive studies, Nissan could not agree to Renault changing its requirements or deciding that a particular component would no longer be part of the joint platform: what is now accepted as legitimate behaviour has evolved over time. Here again, we observed that the process of rule building was actively managed; indeed, basing its approach on the results of the learning processes, management revised the rules step-by-step, leaning either towards a more explicit form of commitment or a more open framework. At each stage, the onus was on fostering the conditions of possibility necessary for collaboration to flourish :

- ✓ When partners were able to find satisfactory joint solutions , they could then embark on more traditional co-development processes
- ✓ Whenever it was incompatible within the platform development, the project for a particular shared component was abandoned and coordination and cohesion were modified accordingly. But new issues that the partners wanted to explore jointly also arose and the cooperation evolved then to a joint research program, requiring a distinctive cohesion framework.

### **Managing exploratory partnerships via the interplay between coordination and cohesion: a new framework**

In that sense, traditional economic analysis is inappropriate to account for the Alliance dynamics: it would be almost impossible to compare the economic advantages or disadvantages of various governance structures in a project whose final parameters had yet to be determined. Simultaneously, an interpretation framed in terms of power, bargaining relationships and mutual dependency would be inadequate as a vehicle for describing the specificities of the actual processes involved. An interpretation based on relationships, stabilisation and trust-building would be also fall short. Our analysis shows that the main issue, in exploratory partnership, is the management to continuously adjust coordination and cohesion. Whereas management science usually studies coordination within stabilised cohesion's frameworks, and economic science focuses on cohesion around pre-defined projects, both dimensions are evolving simultaneously in exploratory partnerships.

In these conditions, the interplay between both coordination and cohesion is crucial; and the main issue is the existence of a dynamic management able to continuously adjust coordination and cohesion. It seems that, apart from very occasional crises, Renault and Nissan were able to manage this evolution over time and adapt both the scope of the platform and the governance structure in a consistent way.

Our analysis highlights a very specific form of "hybrid organization", one destined to mutate continually. This "mutational entity", which we term an *exploratory partnership*, has succeeded, in a manner specific to itself, in taking into account its own particularities. We have discussed a number of the managerial implications of our analytical framework: a special attention must be paid to the interplay between coordination and cohesion dynamics. Yet, while these mutational identities are important in the economic sphere, they may have even broader implications at the institutional level. The question of whether, from a policy perspective, it might not be helpful to define a legal framework in which the transformation of a group and its purpose could be organized is an interesting one. The question of whether the success of the Renault-Nissan Alliance could only have been achieved through managerial innovations, or whether it might also have been achieved through a new legal form of partnership is a central issue for policy makers.

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## EMPIRICAL EVIDENCE OF CHANGING PRODUCTIVE ORGANIZATION IN THE MOTOR INDUSTRY. THE EVOLUTION OF THE COST STRUCTURE OF SPANISH CARMAKERS

*Carmen Peligros Espada, Javier Bilbao Ubillos*

The automobile industry is facing two key challenges: On one hand, it must adapt to a market with an increasing level of competition, where demand continuously pushes prices down and forces quality up; On the other hand, it must adapt to regulations requiring more environmentally-friendly cars.

To handle this new scenario, automobile assemblers have centred on the contribution of their suppliers, requiring them not only to make parts or to add processes, but also to develop managerial and basic design capabilities (Enrietti, Follis & Whitford, 2002). The increasing costs of innovation and the fact that there are so many different types of project, has encouraged a system of delegation of responsibilities and modular product designs to “first tier” component suppliers. These suppliers are becoming involved in new model development (co-design) (Lung and Calabrese, 2003).

Due to this contribution car manufacturers have managed to shorten their lead time, enlarge their range of products, increase their quality –understood as a decrease on the defect rate and also better adaptation of the car to the preferences and needs of customers - and reduce their production costs.

The contribution of “first tier” suppliers has meant a qualitative leap in the configuration of the value chain. In fact, purchases from suppliers have acquired an ever greater specific weight and the number of direct workers at car assemblers is getting progressively smaller. In this note, we check how the lean manufacturing favors a smaller labor requirement at car assemblers. This change is reflected in their profit and loss statements, and it can be contrasted through the relative variation in purchases of inputs (variable “acquisitions”) in the cost structure of all carmakers located in Spain.

### The Cost Structure of the Automobile Sector

According to the American Bureau of Census 1985, industrial businesses spent on average more than half of each sales dollar on product acquisition (Noordewier, John and Nevin 1990, p. 80). Ramsay (1990, p. 3) estimates that, on average, in manufacturing industry, 60% of total costs are accounted for by acquisition of materials and services, and more specifically in the car industry, input purchases represent 70 or 80% of the total vehicle total.

We try to shed some more light on this question. In our research we compare results for the whole automobile sector and for automobile assemblers. In the automobile sector (assembler; “first tier” and “second tier” suppliers) we find that, at current prices for 1986-1994, the average percentage of total value added accounted for by purchases, was 74,91%; wages represented 21,27% and

profits just 3,81%. Purchases continually increased their share: in 1986 it was 73,15%, and, in 1994, 78%.

In the case of automobile assemblers, we observe the importance of purchases (integrated into the *acquisitions* variable) in relation to total costs on the profit and loss statements. We obtain this information for all the car manufacturers located in Spain. Under total costs we have grouped acquisitions, labor cost, financial expenses and repayments<sup>1</sup>. *Acquisitions* contains the value of the goods consumed plus the purchase of services and local taxes. *Acquisitions* contains the value of the goods consumed plus the purchase of services and local taxes.

To check the relative variation in *acquisitions* in the cost structure of Spanish carmakers, we use assemblers’ profit and loss statements from 1978 to 2000.

Table 1 (pp.9-10) allows us to check that *acquisitions* are increasing their specific weight in the cost structure of assemblers. Thus, in the seventies, *acquisitions* represented around 70% and labor costs 20% of the total cost. In the second half of the eighties, *acquisitions* for most carmakers accounted for at least 80%, with labour cost averaging around 15%. In the nineties, *acquisitions* reached 90% or more, whereas labor costs were around 10%.

According to this trend of *acquisitions* in the cost structure, we can conclude that any reduction in their costs would result in a clear competitive advantage for automobile assemblers. As Noordewier, John and Nevin affirm (1990, p. 80) “the influence of the purchases function easily can mark the difference between industry leadership and a difficult defendable competitive position”.

Table 1 also shows the impact of the 1991-1993 crisis in motor industry. This crisis caused major growth in financial expenses for automobile firms. These expenses became especially significant for Mercedes-Benz, Nissan, Santana and SEAT. An interesting fact in the variations in the cost structure of the automobile industry is the opposite trends in acquisitions and labor cost. While acquisitions became relatively bigger (representing more than 90% of total cost for Citroen, Opel, Mercedes and Peugeot by the end of the nineties), labor costs accounted for an ever lower proportion. If we keep in mind that wages have grown notably in the motor industry over these years, the only variable that can explain the reduction in labor costs is a fall in the number of direct employees.

<sup>1</sup> We have considered neither inventory variations nor traffic provisions, given that these figures change their sign (thus, they would adopt a positive sign if inventory variation turns out to be positive or if there is a surplus of provisions over the initial endowment) which would devalue the cost value.

Table 1. - Cost structure for car manufacturers in Spain, 1978-2000. (as % of total costs)

		<b>Citröen Hispania</b>	<b>Ford España</b>	<b>Mercedes – Benz España</b>	<b>Nissan Motor Ibérica</b>	<b>Opel Spain</b>
<b>1978</b>	<b>Acquisitions</b>	76.67	75.94	66.78	71.16	(-)
	<b>Labor Cost</b>	18.07	11.71	26.62	22.16	(-)
	<b>Financial Expenses</b>	2.42	2.35	4.54	4.72	(-)
	<b>Depreciations</b>	2.82	10.00	2.05	1.94	(-)
<b>1982</b>	<b>Acquisitions</b>	70.83	81.73	70.63	64.15	74.90
	<b>Labor Cost</b>	22.19	12.16	18.62	23.98	12.53
	<b>Financial Expenses</b>	4.15	4.38	8.97	8.71	11.65
	<b>Depreciations</b>	2.82	1.72	3.01	3.14	0.9
<b>1986</b>	<b>Acquisitions</b>	77.42	85.72	76.86	68.55	79.66
	<b>Labor Cost</b>	15.05	9.62	16.50	17.25	8.83
	<b>Financial Expenses</b>	2.82	2.52	4.65	7.13	5.20
	<b>Depreciations</b>	5.09	2.07	1.98	7.06	6.3
<b>1990</b>	<b>Acquisitions</b>	86.39	83.55	83.77	78.09	85.28
	<b>Labor Cost</b>	10.97	10.42	11.14	14.95	9.64
	<b>Financial Expenses</b>	0.62	0.25	2.93	1.78	0.03
	<b>Depreciations</b>	2.01	5.77	2.15	5.16	5.04
<b>1994</b>	<b>Acquisitions</b>	87.81	89.89	82.95	76.08	86.78
	<b>Labor Cost</b>	8.90	7.91	12.69	13.42	7.61
	<b>Financial Expenses</b>	0.14	0.14	2.13	5.03	0.12
	<b>Depreciations</b>	3.14	2.06	2.21	5.45	5.47
<b>1998</b>	<b>Acquisitions</b>	88.45	88.46	89.06	80.68	90.07
	<b>Labor Cost</b>	7.7	7.37	7.06	11.79	7.22
	<b>Financial Expenses</b>	0.29	0.37	0.54	0.45	0.04
	<b>Depreciations</b>	4.07	3.80	3.33	7.07	2.66
<b>2000</b>	<b>Acquisitions</b>	90.68	89.39	91.20	83.77	91.84
	<b>Labor Cost</b>	6.25	6.57	6.97	9.51	6.78
	<b>Financial Expenses</b>	0.26	0.31	0.24	0.36	0.08
	<b>Depreciations</b>	2.78	3.72	1.57	6.35	1.29

  

		<b>Peugeot Spain</b>	<b>Fasa Renault</b>	<b>Santana Motor</b>	<b>SEAT</b>	<b>Volkswagen Navarre</b>
<b>1978</b>	<b>Acquisitions</b>	(-)	66.10	68.15	64.74	(-)
	<b>Labor Cost</b>	(-)	27.20	23.86	28.82	(-)
	<b>Financial Expenses</b>	(-)	2.29	3.86	3.37	(-)
	<b>Depreciations</b>	(-)	4.41	4.13	3.06	(-)
<b>1982</b>	<b>Acquisitions</b>	60.04	70.41	63.95	62.25	(-)
	<b>Labor Cost</b>	23.68	20.48	25.99	17.39	(-)
	<b>Financial Expenses</b>	11.59	4.40	5.49	16.37	(-)
	<b>Depreciations</b>	4.69	4.71	4.57	3.98	(-)
<b>1986</b>	<b>Acquisitions</b>	74.08	71.13	65.52	71.09	(-)
	<b>Labor Cost</b>	14.17	19.97	24.49	16.94	(-)
	<b>Financial Expenses</b>	5.53	1.26	4.53	6.18	(-)
	<b>Depreciations</b>	6.22	3.51	5.45	5.78	(-)

<b>1990</b>	<b>Acquisitions</b>	85.76	80.52	66.49	80.87	(-)
	<b>Labor Cost</b>	10.66	14.90	22.38	15.25	(-)
	<b>Financial Expenses</b>	1.86	0.31	4.87	0.86	(-)
	<b>Depreciations</b>	1.71	4.27	6.24	3.01	(-)
<b>1994</b>	<b>Acquisitions</b>	87.73	82.68	69.13	67.83	78.20
	<b>Labor Cost</b>	9.07	12.02	20.82	14.69	12.06
	<b>Financial Expenses</b>	0.93	0.36	2.16	8.07	1.24
	<b>Depreciations</b>	2.27	4.94	7.88	9.41	8.50
<b>1998</b>	<b>Acquisitions</b>	91.71	87.33	84.19	84.11	85.35
	<b>Labor Cost</b>	6.42	8.47	12.23	9.92	8.57
	<b>Financial Expenses</b>	0.38	0.03	0.96	1.78	0.86
	<b>Depreciations</b>	1.49	4.17	2.61	4.18	5.22
<b>2000</b>	<b>Acquisitions</b>	94.58	89.42	85.22	85.64	87.40
	<b>Labor Cost</b>	4.39	7.33	11.19	8.28	8.53
	<b>Financial Expenses</b>	0.33	0.01	0.73	1.88	0.77
	<b>Depreciations</b>	0.69	3.24	2.86	4.19	3.30

Source. Profit and loss statements of automobile assemblers in Spain.

This table allows us to check that *acquisitions* are increasing their specific weight in the cost structure of assemblers. Thus, in the seventies, *acquisitions* represented around 70% and labor costs 20% of the total cost. In the second half of the eighties, *acquisitions* for most carmakers accounted for at least 80%, with labour cost averaging around 15%. In the nineties, *acquisitions* reached 90% or more, whereas labor costs were around 10%.

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An interesting fact in the variations in the cost structure of the automobile industry is the opposite trends in acquisitions and labor cost. While acquisitions became relatively bigger (representing more than 90% of total cost for Citroen, Opel, Mercedes and Peugeot by the end of the nineties), labor costs accounted for an ever lower proportion. If we keep in mind that wages have grown notably in the motor industry over these years, the only variable that can explain the reduction in labor costs is a fall in the number of direct employees.

This empirical evidence reveals that the car industry has been engaged in a lean production process, delegating an ever greater proportion of the car's value to its “first tier” suppliers.

## L'actualité du produit

Ugo Puliese

### LA PASSAT PLUS VOLKSWAGEN QUE JAMAIS

Depuis quelques années les nuages s'accumulent sur le groupe Volkswagen dont la situation financière se dégrade. Les raisons en sont connues : morosité du marché allemand en raison de la situation économique, baisse de la rentabilité sur le marché américain consécutive à l'évolution du cours du dollar par rapport à l'euro, recul des marges et des parts de marché sur ce qui était le très lucratif marché chinois, semi-échec du

renouvellement de la Golf, incapacité de la Polo à percer sur le marché européen des petites voitures, stratégie hasardeuse et coûteuse en haut de gamme (échec de la Phaéton, difficultés chez Bugatti), piétinement de la marque Seat.

Seules les situations de Audi et de Bentley peuvent mettre du baume au cœur des dirigeants de Wolfsburg.

L'une des raisons évoquées pour expliquer les difficultés du groupe Volkswagen réside dans le calendrier des produits de la marque mère. En effet, les Golf et Passat sont toutes deux arrivées en fin de cycle de vie en 2004 et les clients se sont détournés de ces modèles vieillissants ou ont attendu l'arrivée de leurs nouvelles générations. Or, pour éviter d'être bousculé par deux lancements simultanés, Volkswagen a décidé de repousser d'environ un an le renouvellement de la Passat en espérant bénéficier d'une bouffée d'oxygène immédiate grâce à la Golf V. Or, il n'en a rien été, la nouvelle Golf a plutôt déçu les attentes de la presse et de la clientèle et sa percée sur le marché européen s'est révélée assez laborieuse (il a fallu notamment faire un effort sur les prix). Symboliquement, le lancement de la Golf « Plus » a fait apparaître la Golf traditionnelle comme un modèle en « moins ».

La sixième génération de Passat était donc attendue avec impatience car c'est elle qui devrait donner le coup de fouet dont le groupe Volkswagen a tant besoin. La Passat est en outre un modèle assez symbolique pour la marque allemande car c'est elle qui a permis au groupe de s'affranchir de la monoculture à base de Golf. Elle se situe en effet sur un créneau où elle a su s'imposer (pas lors de sa première génération il est vrai) face à des modèles bien établis comme la Ford Mondeo (et avant elle les Ford Taunus et Sierra). A l'image de Peugeot qui a pu s'affranchir de la monoculture de la 205 en imposant à la fois ses 206 et 307 sur le marché européen, Volkswagen a réussi à se faire une place au soleil avec sa paire Golf et Passat.

En 2004, il s'est vendu 214 000 Passat sur le marché européen face aux 171 000 Mondeo, 150 000 Vectra, 128 000 Peugeot 406/407 et 127 000 Laguna. A titre de comparaison, Mercedes n'a écoulé « que » 212 000 Classe C (Audi a quant à lui vendu 236 000 A4 et BMW 265 000 Série 3). Un seul chiffre résume l'importance de la Passat pour la marque Volkswagen : elle génère les deux tiers de ses profits. Malheureusement, la Passat s'inscrit sur un segment en perte de vitesse sur le marché européen puisque celui-ci ne compte plus que pour 8 % du marché total contre 12,5 % en 1999, en raison notamment du succès des monospaces compacts.

La sixième génération de Passat qui apparaît en 2005 est également la première voiture de l'ère post-Piëch. Elle est surtout la première voiture à exprimer le changement de stratégie de plates-formes au sein du groupe Volkswagen. Jusqu'à présent, l'organisation de l'offre dans les quatre marques principales du groupe se faisait en effet de façon très simple, à savoir qu'il y avait une plate-forme pour chacun des grands segments du marché. Chacune des plates-formes était utilisée par chacune (ou presque) des marques du groupe. On avait donc la plate-forme des Polo (utilisée également pour les Seat Ibiza et Skoda Fabia), celle de la Golf (pour les Seat Leon, Skoda Octavia et Audi A3) et enfin celle de l'Audi A4 (pour les Audi A6, Skoda Superb et Volkswagen Passat) et celle de l'Audi A8 (pour les Volkswagen Phaëton et Bentley Continental). On connaît l'inconvénient de cette approche : malgré l'apparente diversité, le client finit par s'apercevoir qu'il s'agit d'un ensemble de clones et qu'il

n'a pas grand chose à perdre en achetant le clone le moins cher.

Le groupe Volkswagen avait donc annoncé il y a quelques années que cette approche se transformerait en une approche par modules et que les marques seraient regroupées en deux familles, les marques classiques autour de Volkswagen et les marques sportives autour d'Audi. On devait ainsi maintenir des économies d'échelles mais en retrouvant une plus grande diversité et, surtout, une identité de marques plus affirmée. La Passat VI vient illustrer cette nouvelle politique de développement puisqu'elle n'est plus basée sur la plate-forme de l'A4 mais sur celle de la Golf V. Et encore, ce que la Passat VI reprend de la Golf V n'est pas dans son soubassement en acier (puisque'il a été allongé, élargi et que son empattement a grandi) mais essentiellement dans ses composants mécaniques. Le client aura donc à faire à une vraie Volkswagen et non plus à une variante d'Audi. Il en résulte au passage un certain nombre de conséquences techniques. Par exemple, les moteurs de la Passat ne sont plus longitudinaux (comme sur les Audi) mais transversaux (comme sur la Golf). Volkswagen explique que cette nouvelle architecture lui permet d'offrir plus de place pour les passagers avant et une proue moins agressive pour les piétons. En valeur, 50 % de la Passat est commune à la Golf. Le fait de reprendre sur la Passat la plate-forme PQ35 de la Golf a permis d'en réduire le coût total de 10 %.

Il est par ailleurs intéressant de comparer l'approche en matière de plates-formes des différents groupes européens. Chez les Français, la plate-forme du segment moyen inférieur (celle des Mégane ou 307) n'est pas utilisée pour le segment moyen supérieur (celui des Laguna, 407 et C5). Au contraire, le segment moyen supérieur fusionne avec le segment supérieur puisque Renault dispose d'une plate-forme (et d'une usine) unique pour ses Laguna, Vel Satis et Espace (toutes produites à Sandouville) tandis que PSA fait de même avec la plate-forme PF3 pour ses C5, C6 et 407 (toutes produites à Rennes).

Par contre, on voit Ford et Volkswagen utiliser la même plate-forme pour le segment moyen inférieur et le segment moyen supérieur avec les plates-formes respectives C1 (Focus, Mazda 3 et 5, Volvo S40 et prochaine Mondeo) et P35 (Golf et Passat). General Motors reste à une approche plus timide puisqu'il a d'une part la plate-forme T (celle des Astra) et d'autre part la plate-forme mondiale Epsilon (Vectra et Saab 9-3 utilisée aussi par la Fiat Croma).

La Passat a pour rôle de confirmer, après l'échec de la Phaëton, que Volkswagen est tout à fait légitime sur le marché des berlines. Si Mercedes a été un certain temps le rival avoué à battre, la marque Volkswagen n'a à proposer que la Passat face à la Classe C et la Phaëton face à la Classe S et rien du tout face à la Classe E. Avec la cinquième génération de Passat (celle qui vient de s'éteindre), Volkswagen avait bien essayé de combler le trou de son offre avec une Passat à moteur W8 mais l'échec a été patent. La marque avait envisagé un modèle (au nom de code C1) face à la Classe E mais ce projet a été abandonné.

Il faudra donc que la Passat VI joue une nouvelle fois le rôle de symbole du haut de gamme Volkswagen puisque la Phaéton n'est guère crédible et que le Touareg manque de personnalité (il est dérivé du Porsche Cayenne dont l'image l'écrase). Mais cette tâche ne sera guère facile avec une plate-forme du segment inférieur.

Néanmoins, une version coupé de la Passat est prévue en 2007 pour ratisser la clientèle un peu plus en haut de gamme (comme l'avait fait le coupé 406 chez Peugeot pour récupérer des clients déçus de la 605). Cette stratégie est assez bien vue car Volkswagen va ainsi s'attaquer, non pas à la Mercedes Classe E, mais aux lucratifs Mercedes CLK et CLS. Ces véhicules offrent de belles marges car leur base technique dérive d'un modèle courant existant mais les prix sont ceux de modèles exclusifs. La particularité du coupé Volkswagen est qu'il aura... cinq portes. Ce coupé apparaîtra fin 2007 et son objectif de production est fixé à 60 000 unités par an.

Une autre mission qui incombe à la Passat est de consolider les ventes de Volkswagen aux Etats-Unis puisque ce modèle, de par sa taille, répond mieux que la Golf (en fait la Jetta, version à coffre fabriquée au Mexique) à la demande nord-américaine. Mais comme la Passat est fabriquée en euros, il apparaît difficile de la vendre facilement à des acheteurs en dollars. D'une façon générale, même en Europe, la nouvelle Passat est affichée à des prix égaux ou inférieurs à ceux de la génération précédente et on espère bien que les marges seront générées grâce à des coûts de production plus bas (obtenus par l'approche modulaire et le programme Formotion) et non grâce à des prix de vente que l'âpreté de la concurrence ne permet plus, malgré un net progrès en qualité de finition.

En définitive, l'arbre du lancement de la Golf a peut-être caché la forêt Passat, laquelle pourrait bien rappeler que Volkswagen reste une marque crédible et solide.

### Une année d'un constructeur

Jean Jacques Roubion

#### TOYOTA

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

Toyota estime avoir vendu 7,47 millions de véhicules dans le monde en 2004, soit 10 % de plus qu'en 2003 et selon le quotidien *Nihon Keizai Shimbun* (21/12/04), le groupe japonais aurait l'intention d'augmenter ses ventes mondiales de 7 % en 2005, à 8,03 millions d'unités, traduisant ainsi son ambition de se développer sur tous les marchés et devenir le premier constructeur automobile mondial devant General Motors et Ford. Toutefois, le président de Toyota, M. Fujio Cho, a souligné que la principale préoccupation du groupe n'était pas de devenir numéro un mondial, mais de mettre l'accent sur la fiabilité de leurs produits et la rentabilité de leurs activités.

Par ailleurs, la presse internationale a annoncé, en mai 2004, que Toyota avait dégagé un bénéfice record sur l'exercice 2003/2004, clos le 31 mars 2004, de 1 162 milliards de yens (8,65 milliards d'euros), en hausse de 55 %, devenant ainsi la première entreprise japonaise à afficher un résultat supérieur à 1 000 milliards de yens. Le groupe a souligné que la hausse des ventes sur ses principaux marchés et la baisse des coûts avaient plus que compensé l'impact négatif de l'appréciation du yen. En outre, le président du groupe a souligné que Toyota récoltait les fruits de ses efforts destinés à renforcer ses activités à l'étranger et à créer une organisation mondiale résistante mieux aux fluctuations sur les marchés et aux risques de change.

Les objectifs de Toyota en Europe, selon *Les Echos* (02/03/05), sont de pouvoir franchir sans difficulté, dès 2006, la barre du million de voitures vendues, notamment grâce au lancement de la Yaris de seconde génération et ce, malgré la morosité du marché européen. Après 916 000 immatriculations en 2004, dont 24 000 pour Lexus, le constructeur japonais viserait 980 000 ventes en

2005. Dans un entretien accordé à *Auto Infos* (19/11/04), M. Thierry Dombreval, vice-président de Toyota Motor Manufacturing Europe, a expliqué que le succès du groupe japonais en Europe était dû à la croissance de ses ventes de modèles diesel et à l'engouement suscité par des produits tels que l'Aventis et la Yaris. Selon lui, Toyota a pris de l'avance sur son objectif d'occuper 5 % du marché européen d'ici à la fin de 2006 et que cette part de marché devrait finalement avoisiner les 7 %. Il est à noter que Toyota assemble en Europe 60 % des véhicules qui y sont vendus, le reste étant importé du Japon.

En France, les équipementiers japonais affluent près de Toyota-Onnaing, notamment Toyota Boshoku qui, selon la *Tribune* (28/12/04), va investir 7 millions d'euros dans l'implantation, à Onnaing, d'un site de production qui emploiera une centaine de personnes et dont la capacité de production sera de 250 000 boucliers en plastique par an. L'investissement de cet équipementier fait suite à celui de Toyotomi Kiko, qui avait annoncé en octobre 2004 la construction d'une usine d'emboutissage destinée à produire des pièces de rechange pour les anciens modèles de Toyota fabriqués en Europe. Outre ces deux équipementiers, sont également présents Mitsui (messagerie et fret) et Ogura (fabrication d'embrayages et de systèmes de climatisation) et d'après la *Tribune*, deux autres équipementiers auraient annoncé leur implantation près de Valenciennes en vue de produire, dès 2006, des pièces de rechange destinées aux Yaris, Corolla et Avensis. Ces arrivées renforcent ainsi l'implantation de Toyota à Onnaing qui, en activité depuis trois ans et employant 3 200 salariés, est devenue la troisième usine la plus productive en Europe, notamment avec une production cumulée de 400 000 Yaris (*Les Echos* - 30/01/04). Quant à la stratégie de Toyota en France, le directeur général de Toyota France, M. Michel Gardel, a

annoncé dans un entretien accordé à *L'Argus* (08/04/04) que le constructeur japonais ne pratiquait pas de politique des rabais et que son positionnement en termes de prix demeurerait très différent de celui de certains concurrents qui « bradent leurs prix ». Par ailleurs, il a ajouté que Toyota France comptait développer le commerce de véhicules d'occasion, autrement sa croissance s'arrêterait. La presse allemande a souligné, en janvier 2005, la forte progression de Toyota Deutschland en 2004, en révélant que le constructeur a réalisé cette année-là ses meilleures ventes depuis son arrivée dans ce pays, il y a plus de trente ans. En effet, Toyota a écoulé 127 019 véhicules, la Corolla étant le modèle le plus vendu avec 28 225 unités. Le vice-président de Toyota Deutschland, M. Markus Schrick a d'ailleurs laissé entendre que le bénéfice et le chiffre d'affaires de la filiale avaient également augmenté de manière non négligeable et qu'il visait 130 000 ventes en 2005, dont 3 000 Lexus et 4000 Aygo, tout en précisant que l'objectif en 2005 est la consolidation et non pas la croissance.

Quant à l'Europe centrale et orientale, le quotidien *Nihon Keizai Shimbun* (16/03/04) a évoqué la forte expansion, depuis quelques années, de l'activité de Toyota dans la région, notamment en Pologne où le constructeur a vu ses ventes passer de 3 000 unités en 1995 à 36 000 unités en 2003. En Pologne, Toyota a dépassé Volkswagen, en termes de parts de marché, et dispute la troisième place à Renault et Opel. Après avoir vendu 57 000 voitures en Europe centrale (notamment en Pologne et en Slovaquie) en 2003, le groupe japonais renforcera sa présence dans la région avec l'entrée en activité, en 2005, de l'usine conjointe avec PSA Peugeot Citroën en République tchèque (Kolin). La présence de Toyota en Russie a également été évoquée dans la presse internationale, en avril 2005, avec la décision du groupe de construire, dans la région de Saint-Petersbourg, sa première usine d'assemblage dans ce pays. Ce projet représente un investissement initial de 140 millions d'euros et l'usine aura une capacité de production de 50 000 véhicules par an (dans un premier temps, 20 000 Camry y seront fabriqués annuellement et ce, à partir de 2007).

En ce qui concerne les Etats-Unis, le quotidien *Nihon Keizai Shimbun* (05/01/05) a révélé que Toyota était devenu, en 2004, le premier constructeur étranger à écouler plus de deux millions de véhicules sur ce marché, avec un total de 2 060 049 unités. Pour 2005, le groupe japonais prévoit une croissance plus modérée de ses ventes aux Etats-Unis, de l'ordre de 5 %. D'après le directeur général de Toyota Motor Sales, M. Yukitoshi Funo, ce record de ventes a reflété l'accueil réservé aux modèles Scion, créée pour les jeunes automobilistes (vendue à 99 000 unités), de la Camry (modèle le plus vendu sur ce marché avec 427 000 unités) et la Prius hybride dont les ventes ont augmenté de 120 % (54 000 unités) en raison de la hausse des prix de l'essence. Par ailleurs, selon *Wall Street Journal* (23/02/05), Toyota devrait annoncer la construction de deux nouvelles usines d'assemblage aux Etats-Unis d'ici la fin de la décennie, ce qui porterait à huit le nombre de ses bases de production en Amérique du Nord. A partir de 2006, le groupe japonais disposera d'une capacité de production totale de 1,6 million d'unités par an en Amérique du Nord et ne ca-

che plus son ambition de supplanter General Motors au niveau mondial, y compris en termes de ventes. En Amérique latine, le quotidien *Nihon Keizai Shimbun* (01/03/05) a évoqué l'intention du groupe japonais d'accroître ses capacités de production de véhicules IMV (tout terrain et pick-ups) de 160 % en Argentine, à 65 000 unités par an, d'ici la fin 2005. Cette expansion, dont l'investissement sera de l'ordre de 200 millions de dollars, vise à transformer l'usine argentine en une base d'exportation vers les autres pays d'Amérique latine afin d'exporter près de 70 % des véhicules qui y seront produits. Quant au Brésil, le quotidien *O Estado de São Paulo* (25/11/03 et 06/01/04) a révélé que le groupe japonais envisageait d'exporter vers les Etats-Unis des panneaux de carrosserie destinés à l'assemblage des Corolla ainsi que des Corolla produites au Brésil, dans l'usine d'Indaiatuba, dont la production a plus que triplé depuis son inauguration en 1998, à 57 000 unités par an. Selon le président de la filiale brésilienne de Toyota, M. Hiroyuki Okabe, les niveaux de qualité de l'usine d'Indaiatuba sont semblables à ceux des pays développés, l'indice de défaut sur les Corolla y étant de 0,3 % contre un indice de 0,7 % au Canada et de 1,7 % aux Etats-Unis.

En Chine, le quotidien *Nihon Keizai Shimbun* (06/09/04) a révélé que suite au feu vert des autorités chinoises au projet de société conjointe entre le groupe japonais et Guangzhou Automobile, les deux partenaires ont signé un accord en vue de la création de la société conjointe baptisée Guangzhou Toyota Motor, représentant un investissement de l'ordre de 375 millions d'euros. Dans la nouvelle usine qui sera construite au sud de Guangzhou, Toyota compte produire 10 000 Camry par mois, l'objectif étant d'atteindre un rythme de 200 000 unités par an à court terme. Le quotidien *Nihon Keizai Shimbun* (06/04/04) a également révélé que Toyota a créé une société conjointe à Changchun, FAW Toyota Changchun, destinée à la production de moteurs, et dont l'investissement représente près de 121 millions d'euros. Par ailleurs, selon *Nihon Keizai Shimbun* (14/01/05), Toyota a pour la première fois baissé les prix de ses voitures fabriquées en Chine afin de stimuler la demande et d'éviter ainsi un accroissement de ses stocks à quelques mois du lancement de plusieurs nouveautés, telles que la berline de luxe Crown et la voiture de catégorie moyenne Mark X, prévues pour le printemps 2005. Le groupe japonais est ainsi entré dans la guerre des prix qui s'est installée entre les constructeurs japonais, européens et américains dans ce pays.

Enfin, élu « Homme de l'année 2003 » par le *Journal de l'Automobile*, M. Fujio Cho a déclaré au magazine que la façon de penser et d'agir de Toyota s'articulait autour de deux concepts : le respect de l'homme et l'amélioration permanente. Il a également révélé être déterminé à « aller toujours de l'avant vers de nouveaux défis, fidèles à l'esprit Toyota », notamment en ce qui concerne l'environnement, qui, selon lui, figure parmi les principaux défis du secteur automobile au 21<sup>ème</sup> siècle. A ce propos, M. Fuji Cho a souligné que, malgré le souhait de Toyota de garder la maîtrise des technologies clés, toutes les possibilités d'alliances seraient étudiées afin que le groupe japonais demeure réactif par rapport aux exigences du marché.

Note d'ouvrage – Book note  
Christian Mory

### CHRONIQUE D'UN DESASTRE PREVISIBLE

Après le remarquable ouvrage de Rodolphe Greggio,<sup>1</sup> un nouvel ouvrage paraît en France pour expliquer la situation difficile dans laquelle se trouve aujourd'hui le groupe Fiat. Marc Brianti<sup>2</sup> ancien directeur général adjoint des relations extérieures de Fiat France, vient en effet de publier ses souvenirs d'une trentaine d'années passées au service de la Maison turinoise et des frères Agnelli (il était proche d'Umberto).

Ouvrier à quatorze ans puis journaliste, mais parallèlement militant socialiste, Marc Brianti rejoint à l'âge de 27 ans une société encore surtout piémontaise et paradoxalement peu regardante du parcours de ses collaborateurs pourvu qu'ils soient brillants. Marc Brianti était de ceux là et il raconte en détails comment, partant de zéro, il a construit les relations de Fiat avec la presse française. Surtout, il sera un témoin de premier plan des difficultés sociales et commerciales qui resteront permanentes au sein du groupe italien malgré sa montée en puissance. Le verdict de l'auteur est attristant : Fiat a été miné de longue date par une situation sociale qui allait bien au-delà de son propre périmètre. La tradition révolutionnaire de la classe ouvrière italienne et le déracinement des employés du Mezzogiorno ont conduit à un climat social délétère, parsemé d'attentats et d'assassinats. Nulle entreprise ne pouvait y faire face dans un pays mal gouverné d'autant plus que les frères Agnelli se sont égarés dans des flirts avec une classe politique impuissante.

Ouvrage sincère et passionné, « Ma vie chez Fiat » offre en outre une belle série de portraits et revient en détails sur l'ambigu enlèvement de Revelli-Beaumont, ancien président de Fiat France en 1977.

<sup>1</sup> Rodolphe Greggio – Fiat, une crise automobile - Editions de l'officine (2003)

<sup>2</sup> Marc Brianti – Ma vie chez Fiat – Editions du félin (2005)

### A FORESEEABLE DISASTER CHRONICLE

After the remarkable Rodolphe Greggio work<sup>1</sup>, a new book appears in France to explain the difficult situation in which stands the group FIAT today. Marc Brianti<sup>2</sup>, a former general manager of FIAT France external relations, has just indeed published his memories of about thirty years spent to the service of the Turin House and of the Agnelli brothers (he was close to Umberto).

Workman at fourteen years then journalist, but in parallel socialist militant, Marc Brianti joined at the age of 27 a company still especially Piedmontese and paradoxically little looking at the background of his/her collaborators provided that they are brilliant. Marc Brianti was among those and it tells in details how, starting from the scratch, he built the relations between FIAT and the French press. Especially, he will be a foreground witness of the social and commercial difficulties which will remain permanent within the Italian group in spite of its growth. The verdict of the author is depressing: FIAT was undermined of long date by a social context which went well beyond its own perimeter. The revolutionary tradition of the Italian working class and the uprooting of the employees from the Mezzogiorno led to a noxious social climate, strewn with attacks and assassinations. No company could face it in a badly managed country more especially as the Agnelli brothers were misled in flirts with an impotent political community.

Sincere and impassioned work, "My life at FIAT" offers moreover a beautiful series of portraits and returns in details on the ambiguous removal of Revelli-Beaumont, former president of FIAT France in 1977.

<sup>1</sup> Rodolphe Greggio – Fiat, une crise automobile - Editions de l'officine (2003)

<sup>2</sup> Marc Brianti – Ma vie chez Fiat – Editions du félin (2005)

### Séminaires - Colloques

#### CONGRES AUTOMOTIVE MEETINGS 2005

France (Paris La Défense), les 8 et 9 juin 2005, CNIT

Le Congrès est construit autour des principales problématiques recueillies auprès des acteurs majeurs de la filière automobile, dont notamment :

- ✓ Coordonner les stratégies internationales et locales
- ✓ Optimiser vos partenariats interindustriels
- ✓ Maîtriser les enjeux énergétiques et environnementaux
- ✓ Manager la R&D
- ✓ Optimiser la chaîne d'approvisionnement
- ✓ Quelles innovations pour quels développements du marché automobile mondial ?

#### Pour plus d'informations :

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#### CONGRESS "THE FUTURE POTENTIAL OF EUROPEAN AUTOMOTIVE PRODUCTION THROUGH SUSTAINED TECHNICAL AND SOCIAL INNOVATION"

Germany (Bochum), 31 May and 1 June, 2005

This congress will take place at the Ruhr-University of Bochum, under the auspices of Prof. Dr. Ludger Pries (Faculty of Social Science) and with support from the North Rhine-Westphalian Ministry for Industry and Work

(Ministerium für Wirtschaft und Arbeit). Other partners include INCCAS, NRW-auto.de and the Department of Cooperation between the Ruhr-University Bochum and IG Metall (Gemeinsame Arbeitsstelle RUB-IGM).

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**JSPE 53<sup>RD</sup> ANNUAL CONFERENCE, 2005**

*Neo-liberalism and the Crisis of Contemporary Society*  
Japan (Tokyo), 15-16 October 2005 at Daito Bunka University

The JSPE invites proposals for sessions in English in the following two categories. (The main language of the conference is Japanese. There will be several English sessions on October 15).

**English Sessions 1: Neo-liberalism and the Crisis of Contemporary Society**

The JSPE welcomes the papers in reference to neo-liberalism with key words such as:

- (1) labor, poverty, classes and the polarization of winners and losers in the world economy;
- (2) globalization, new imperialism, etc.,
- (3) The question of "Where to find the agent of required social reforms", and
- (4) other problematic.

**English Sessions 2: Other General topics**

The JSPE also hopes to organize sessions focused on such popular themes as gender, the environment, economic regions and the Chinese economy, while remaining completely open to suggestions and proposals of presentations on other topics.

**Deadline for proposals:** 31 May 2005

Proposals should be reached the JSPE International Communication and Exchange Committee by 31 May 2005 at the latest.

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**ECOLE THEMATIQUE CNRS, CIRAD, INRA  
ANALYSE DES CHANGEMENTS INSTITUTIONNELS:  
CARACTERISATION, METHODES, THEORIES ET  
ACTEURS**

France (La Rochelle), 14-17 septembre 2005, Résidence Club Lafayette

**Objectifs :**

Le premier objectif visé est un apport de connaissances concernant le thème traité (problématiques, méthodes, domaines d'application).

Des conférences suivies de contrepoints et d'une discussion ouverte à tous les participants, répondent à cet objectif. Il s'agit aussi de favoriser un échange entre les participants concernant leurs propres expériences de recherche sur le sujet. Des ateliers sont organisés à cet effet. Chaque atelier portera sur une thématique particulière en relation avec une conférence et donnera lieu à la présentation et à la discussion de quelques travaux sélectionnés à la suite d'un appel à contributions des participants.

**Liste des Ateliers :**

**A - Les théories institutionnalistes face aux changements institutionnels**

- ✓ Atelier 1 : "Complémentarités et oppositions des approches institutionnalistes pour l'analyse du changement institutionnel"
- ✓ Atelier 2 : "Approches comparatives du changement institutionnel"

**B - Institutions, structures et régulation**

- ✓ Atelier 3 : "Institutions et transformations des marchés"
- ✓ Atelier 4 : "Travail, compétences et mutations du rapport salarial : vers une ré-institutionnalisation des rapports de travail"

**C - Les changements dans les niveaux de régulation**

- ✓ Atelier 5 : "Activités immatérielles et relationnelles, accumulation immatérielle et patrimoines"
- ✓ Atelier 6 : "Les nouvelles régulations dans la perspective de l'Union Européenne élargie"

**D - Le rôle du politique du symbolique dans les changements institutionnels**

- ✓ Atelier 7 : " Le rôle du politique du symbolique dans les changements institutionnels "

**Date limite d'inscription :** 31 mai 2005

**Date limite pour la proposition des communications :** 05 juin 2005

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<http://www.toulouse.inra.fr/centre/esr/ecth2005/>

Centre documentaire  
Danielle Lacroix

### LIVRES REÇUS

BRIANTI Marc, *Ma vie chez Fiat. Le parcours singulier d'un jeune ouvrier socialiste devenu l'un des dirigeants du groupe turinois*, Paris, Éditions du Félin, 2005, 313 p. Préface, Gilles MARTINET – Postface, Vincent DUCLERT.

### LIVRES ACQUIS

CARRILLO Jorge, LUNG Yannick and van TULDER Rob, *Cars, Carriers of Regionalism?*, Basingstoke, Palgrave Macmillan, 2004, 309 p.

KUMON Hiroshi and ABO Tetsuo, *The Hybrid Factory in Europe. The Japanese Management and Production System Transferred*, Basingstoke, Palgrave Macmillan, 2004, 297 p.

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## CALENDRIER DES RÉUNIONS DU RÉSEAU 2005

### ESEMK Workshops

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

“Change Dynamics of European Employment Relationships: New Governance Compromises in Britain, Germany and Sweden”.

### Comité de pilotage international du GERPISA

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

### Réunion des participants ESEMK

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

### 13<sup>ème</sup> Rencontre Internationale du GERPISA

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

## LA LETTRE DU GERPISA

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