



Panel Discussion: Near-to-Mid-Term Predictions for the Global Automotive Industry

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GERPISA :

International multidisciplinary network of
social scientists involved in the auto industry

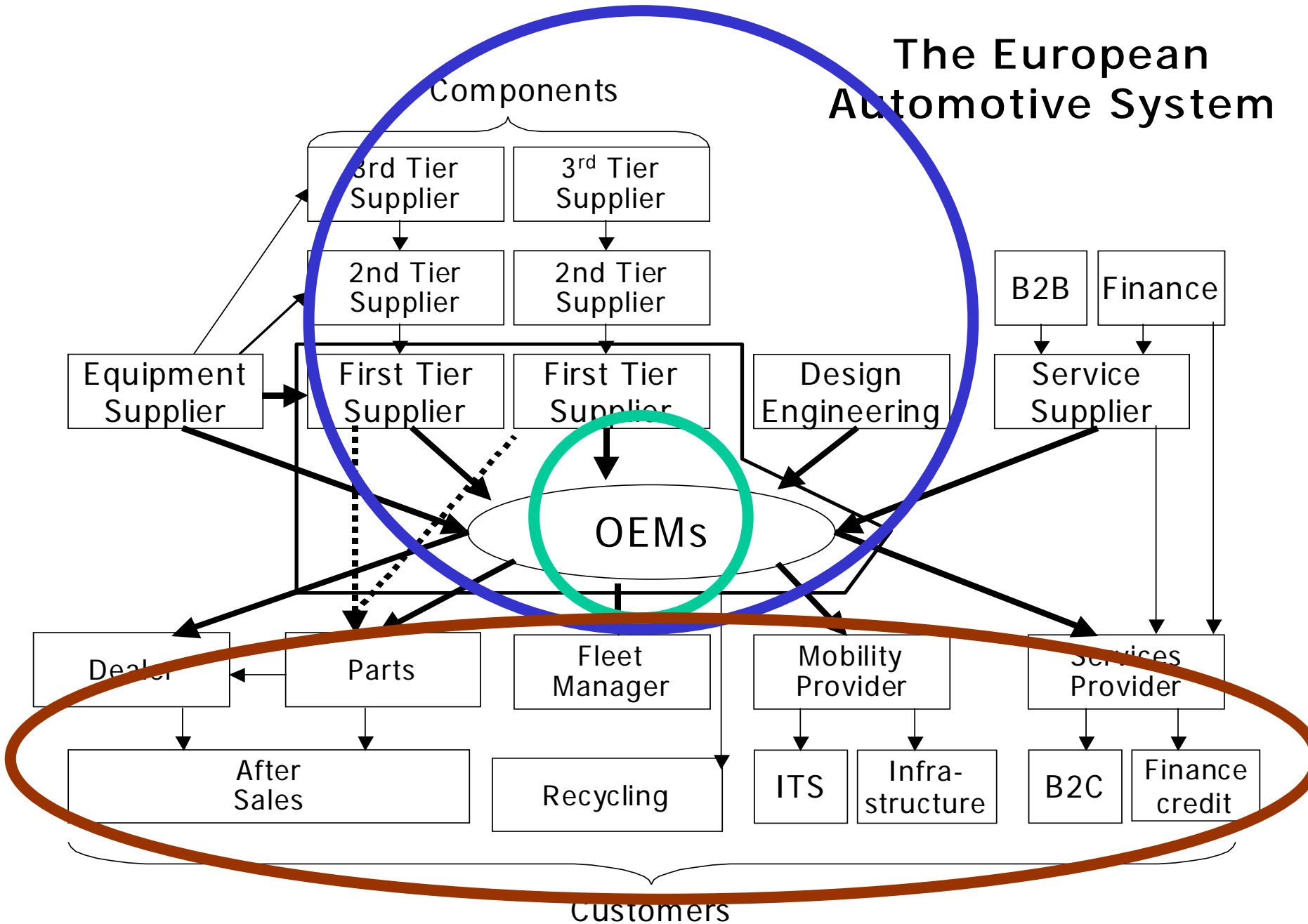
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3 international research programmes since 1992 \Rightarrow 3 conclusions (attitudes)

1. A new tendency? (Japanese model, globalization, modularization, new economy, etc.) \Rightarrow to be careful with new fashionable [« in »]concept
2. Dynamics of coherence between practices [institutional complementarity, Masahiko Aoki, RIETI / *productive models*, Robert Boyer, Michel Freyssenet (GERPISA)]
3. Paradigm of a renewed diversity \Rightarrow the future will be plural

The European Automotive System





Near-to-Mid-Term Predictions for the Global Automotive Industry

4 questions

- **What will be produced?**
- Who will produce (manufacture and assembly, sale, finance, repair, etc.?)
- Where to produce? (new emerging countries?)
- How to produce? (modular vs integral? BTO?, etc.)

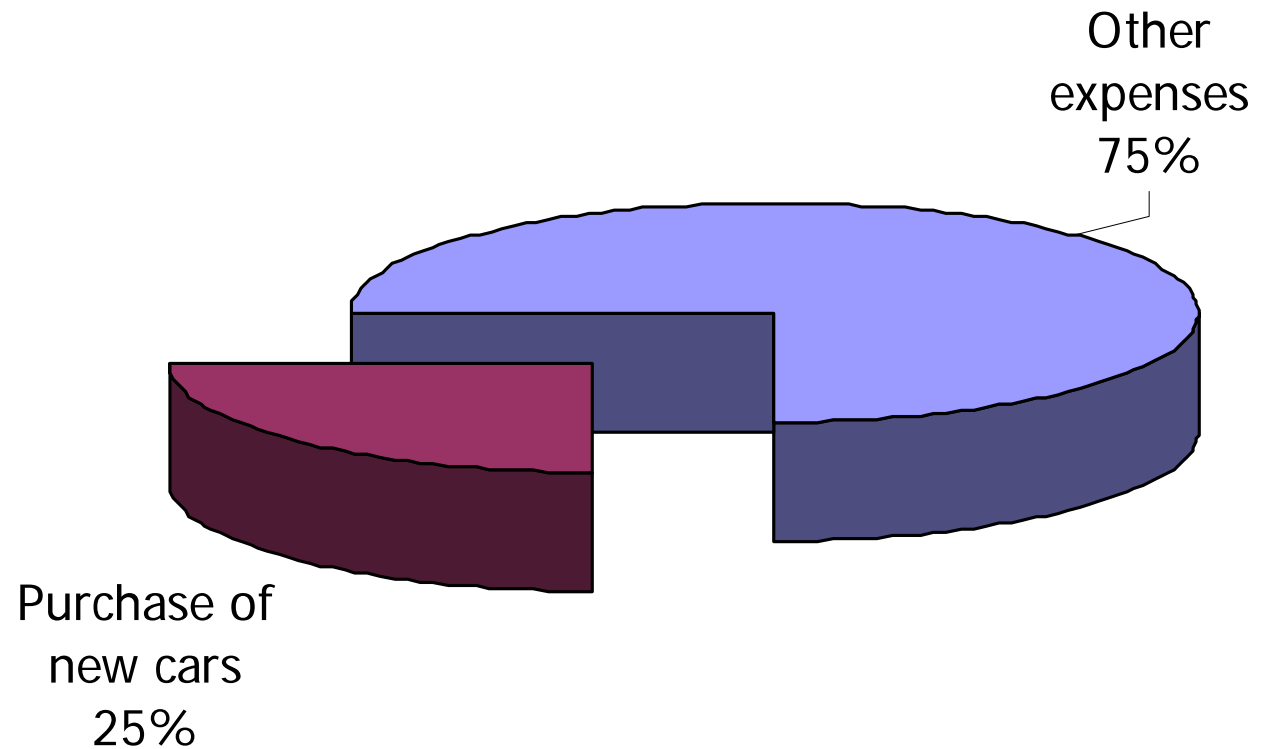


What will be produced?

- A vehicle
 - What types : global / local products?
new niches/segments (after minivan,
SUV, cross-over,...)
 - Which propulsion technologies?
- And Services?



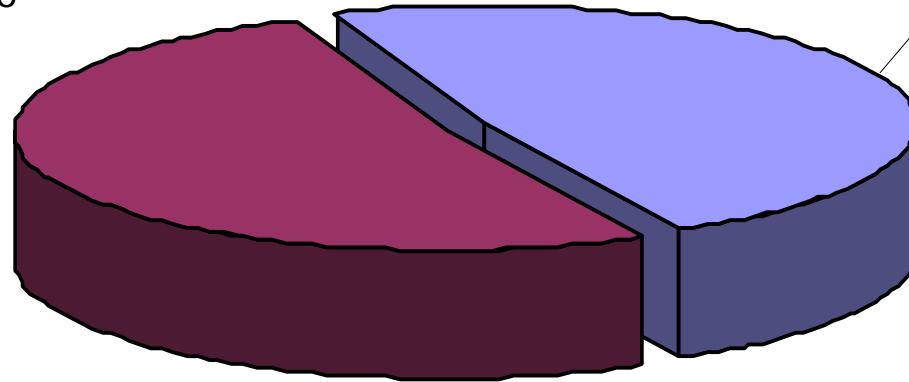
Structure of households motorization expenses (France)





Source of profits for Ford and GM (average 90s)

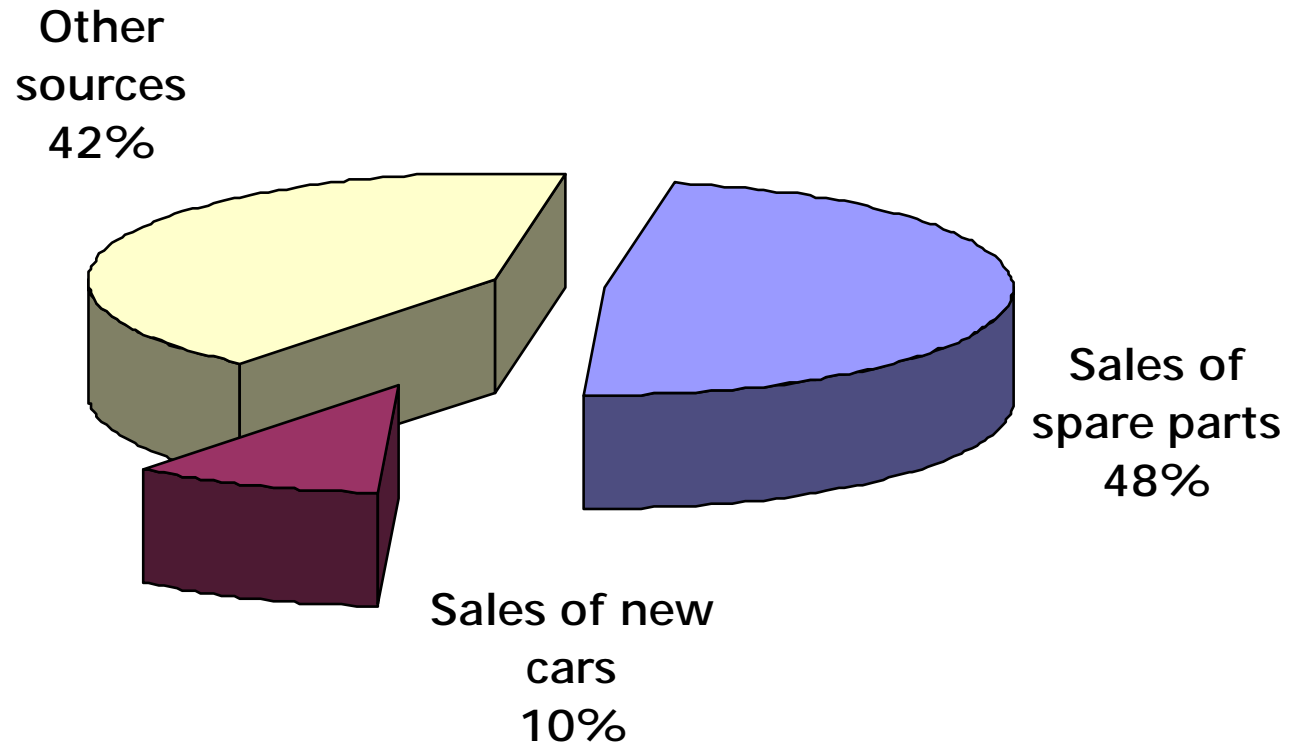
Manufacturing
Activities
52%



Finance
48%



Source of profit for car retailers (France)





How to make services profitable?

- Consolidate unstable business models
 - Finance and assurance
 - Repair and maintenance
- Searching for sustainable business models
 - e-services (ITS, Internet, etc.)
 - Recycling and used vehicles/parts
 - Mobility provider?