German Institute for Japanese Studies (DIJ) ードイツ-日本研究所
EU-Japan Centre for Industrial Cooperation ー日欧産業協力センター
Industrial Investment Council (IIC) ーIIC-東部ドイツ産業投資公社

International Symposium
国際シンポジウム

RECENT DEVELOPMENTS IN THE AUTOMOTIVE SUPPLIER INDUSTRY IN JAPAN AND THE EU
日本とEUにおける自動車サプライヤー産業の発展

10th December 2004
2004年12月10日

Conference Venue
Meiji University University Hall
会場
明治大学大学会館

◆日英同時通訳◆

German Institute for Japanese Studies （DIJ）
3-3-6, Kudan Minami, Chiyoda-ku, Tokyo 102-0074 Japan
ドイツ-日本研究所　〒102-0074 東京都千代田区九段南 3-3-6
Tel.: +81-(0)3-3222-5077　Fax: +81-(0)3-3222-5420
e-mail: dijtokyo@dijtokyo.org　homepage: http://www.dijtokyo.org

EU-Japan Centre for Industrial Cooperation
13-1, Ichibancho, Chiyoda-ku, Tokyo 102-0082 Japan
日欧産業協力センター　〒102-0082 東京都千代田区一番町 13-3
Tel.: +81-(0)3- 3221-6161　Fax: +81-(0)3- 3221-6226
e-mail: eujapan@eu-japan.gr.jp　homepage: http://www.eu-japan.gr.jp

Industrial Investment Council (IIC)
13F Shinagawa Mitsubishi Building
16-4, Konan 2-chome, Minato-ku, Tokyo 108-0075 Japan
IIC-東部ドイツ産業投資公社　〒108-0075 東京都港区港南 2-16-4 品川三菱ﾋﾞﾙ 13 階
Tel.: +81-(0)3-6719-0440　Fax: +81-(0)3- 6719-0442
e-mail: tokyo@iic.de　homepage: http://www.iic.de

Organization: Andreas Moerke (DIJ)
Fabrizio Mura (EU-Japan Centre)
Christian Blank (IIC)
Secretariat: Sugimoto Eiko (DIJ)
Asano Keiko (DIJ)
Higuchi Aiko (EU-Japan Centre)
企画担当： A.　メルケ
F.　ムラ
C.　ブランク
事務担当： 杉本　栄子
浅野　慶子
樋口　愛子

国際シンポジウム
『日本とEUにおける自動車サプライヤー産業の発展』

自動車産業界はグロバリゼーションを通じ、産業の整理統合と付加価値の変化という二つの重要な展開を見せ、独立した自動車メーカーは日本では二社、ドイツでは三社のみとなった。OEM の新しいフォーカスは限られた数のキーサプライヤーに向けられており、これはサプライヤー分野の整理統合の状況を反映している。会社再編成計画の一環である事業モデルとして、低コストを目指す海外への生産拠点移転があるが、これは将来的な事業の成功を保証することができるだろうか。

低コスト生産拠点への移転を検討する場合、当地において今日のハイオートメーション化された生産に必要な専門的知識がそろわない可能性があるため、製品の特性や生産過程について熟考する必要がある。そこで、先進国においての自動車産業クラスターにおいて新生産工場を設立するのは、実はより良い選択なのかもしれない。

本シンポジウムでは、日本と欧州（主にドイツ）の自動車サプライヤー産業における最近の発展を考察し、両地域における産業界の挑戦を戦略と方針、そして共通点と相違点に着目して比較する。

尚、このシンポジウムは下記後援者のご協力を得て開催され、「日本におけるドイツ年 2005/2006」のイベントの一環でもある。

- 在日ドイツ大使館
- 日本自動車部品工業会
- 明治大学 ・ 関西学院大学
- 法政大学イノベーション･マネジメント研究センター

プログラム

12:30 　**受付**

12:45 – 13:20 　**開会挨拶および基調講演**

時間	講演者	講演内容
12:45	フロリアン・クルマス （ドイツ-日本研究所）	開会の挨拶
12:50-13:20	木谷　哲夫 （マッキンゼー ＆ カンパニー）	基調講演: 将来の自動車産業のヴァリュー・チェーン

International Symposium
"Recent Developments in the Automotive Supplier Industry in Japan and the EU"

Globalization in the automotive industry has led to consolidation and changes in the value chain, leaving only two independent car makers in Japan and three in Germany. OEMs now focus on a limited number of key suppliers, reflecting consolidation in the supplier sector. Relocation of production to low-cost countries is on the agenda as firms restructure their business model – but can this guarantee future success?

Product characteristics and production processes must be considered when evaluating a move to a low-cost location that may lack the specialized knowledge needed for today's highly automated production. Automotive clusters in highly developed countries may still be the better choice for establishing new production facilities.

The symposium will examine recent developments in the automotive supplier industry in Japan and Europe – mainly Germany – comparing strategies and policies, as well as commonalities and differences with regard to the challenges the industries face in both regions.

The symposium is the initial event of our actions in the "Germany in Japan 2005/2006" year. The organisers gratefully acknowledge the support of

- the Embassy of the Federal Republic of Germany in Japan
- the Japan Automotive Parts Industrial Association (JAPIA),
- Meiji University and Kwansei Gakuin University,
- the Research Institute of Innovation Management, Hosei University.

Program

12:30 Doors Open

12:45 – 13:20 Welcome and Keynote Speech

Time	Name, Institution	Title
12:45	Prof. Dr. Florian COULMAS, German Institute f. Japanese Studies	Greeting
12:50-13:20	Mr. Tetsuo KITANI, McKinsey & Company	Keynote speech: Future Automotive Value Chain

13:25 – 15:05　第 1 セッション『OEM 購買政策の変化』

司会:　ヨッヘン・レゲヴィー　(CNC 株式会社)

時間	講演者	講演内容
13:25-13:55	青木　克生 (関東学院大学)	日本自動車メーカーにおける購買政策の変化ー財務データの国際比較から得られる示唆
14:00-14:30	ユルゲン・ビショッフ (フラウンホファー研究所 IPA)	欧州における未来の自動車産業の発展：OEM とサプライヤーにとってのチャレンジと必要条件
14:35-15:05	リヒャルド・クラックラウアー (ザックス･オートーモーティブ･ジャパン株式会社)	日本の自動車産業の構成変更と外資系からの挑戦

15:10 – 15:30 コーヒーブレイク

15:30– 17:10　第 2 セッション『ローカルサプライヤーの空洞化前兆』

司会:　ファブリツィオ・ムラ　(日欧産業協力センター)

時間	講演者	講演内容
15:30-16:00	清　响一郎 (関東学院大学)	日本自動車部品メーカーにおける継続的技術革新 - 日本における空洞化へのインプリケーション -
16:05-16:35	古川　澄明 (山口大学)	自動車産業拠点の中欧へのシフトとドイツに立地条件の行方：自動車部品産業の事例
16:40-17:10	河村　英明 (アーンスト アンド ヤング)	東欧と中国への自動車産業の移行 - ドイツの薄暗い展望？

17:10 – 18:50　第 3 セッション『クラスター：新しい生産性への道』

司会:　クリスチャン･ブランク　(IIC - 東部ドイツ産業投資公社)

時間	講演者	講演内容
17:10-17:40	ハインツ-ユルゲン・クレプチヒ (アウクスブルグ単科大学)	ドイツの自動車産業クラスター – 中小企業にとっての課題
17:45-18:15	ゲルト・ヘルマン (前タカタ・ペトリ社)	東部ドイツ自動車産業クラスター：日系サプライヤーとしての観点
18:20-18:50	辻　正次 (大阪大学大学院)	日本の自動車産業クラスター　/ 愛知県

18:50 – 19:00　アンドレアス･メルケ（ドイツ-日本研究所） まとめ

19:00 – 20:00　交流会

13:25 – 15:05 Session 1 "Changes in OEM Purchase Policy"

Chair: Dr. Jochen Legewie, CNC – Communications & Network Consulting Japan KK

Time	Name, Institution	Title
13:25-13:55	Prof. Dr. Katsuki AOKI, Kantogakuin University	Changes in OEM Purchasing Policy in Japan: Some Suggestions from an International Comparison of Financial Data
14:00-14:30	Dr. Jürgen BISCHOFF, Fraunhofer IPA	Developments in the European Automotive Industry – Requirements and Challenges for OEMs and Suppliers
14:35-15:05	Mr. Richard KRACKLAUER, Sachs Automotive Japan	Changes in the Japanese Market – A Foreign Firm's View

15:10 – 15:30 Break: Coffee and Networking

15:30– 17:10 Session 2 "Hollowing-Out: Threats for the Local Suppliers?"

Chair: Dr. Fabrizio Mura, EU-Japan Centre

Time	Name, Institution	Title
15:30-16:00	Prof. Dr. Shoichiro SEI, Kantogakuin University	Continuous Process Innovation in Japanese Auto Parts Manufacturing: Implications for Hollowing-Out in Japan
16:05-16:35	Prof. Dr. Sumiaki FURUKAWA, Yamaguchi University	The Shifting of Production Capabilities of the Automobile Industry from Western Central Europe and Germany's Position as a Business Location: The Case of the Automotive Components Industry
16:40-17:10	Mr. Hideaki KAWAMURA, Ernst & Young	The Automotive Industry Shift to Eastern Europe and China: Dim Prospects for Germany?

17:10 – 18:50 Session 3 "Cluster – a Way to new Productivity?"

Chair: Mr. Christian Blank, IIC

Time	Name, Institution	Title
17:10-17:40	Prof. Dr. Heinz Jürgen KLEPZIG, Augsburg University of Applied Science	Automotive Clusters in Germany – Tasks for Small & Medium Enterprises
17:45-18:15	Mr. Gert HERRMANN, formerly Takata-Petri	The Easter German Automotive Cluster- A Japanese Supplier's Perspective
18:20-18:50	Prof. Dr. Masatsugu TSUJI, Osaka University	Automotive Clusters in Japan – the Aichi Region

18:50 – 19:00 Wrap-up, Dr. Andreas Moerke, DIJ

19:00 – 20:00 Reception and Networking

講演要旨／Abstracts

基調講演／Keynote

木谷 哲夫（KITANI Tetsuo）

Future Automotive Value Chain

The central question on our minds is : given what we know about the likely advances in automotive technology, what will the value chain look like in ten to twelve years? McKinsey interviewed more than 250 automotive industry experts about the costs and market adoption rates of future technologies. As vehicle production becomes fully integrated, the boundaries between traditional vehicle segments will become increasingly hazy. Companies with expertise in electronics and software will find a market for their products in nearly all areas of vehicle production. Companies that want to secure profits in the market of the future need to take action now. Only companies that are aware of changes taking place in the value chain and that are adapting their strategy will achieve long-term success.

第１セッション『OEM 購買制作の変化』
Session1 "Changes in OEM Purchase Policy"

青木 克生（AOKI Katsuki）

日本自動車メーカーにおける購買政策の変化－財務データの国際比較から得られる示唆－

本報告の目的は、日本自動車メーカーにおける購買政策の変化と、それがもたらす国際的・国内的インパクトを示すことにある。ここでは特に、NRP、CCC21 といった日本メーカーによる新しい購買方式の導入が、グローバル・ベンチマークに基づく価格設定への変更を伴うものであり、その結果、グローバル競争のレベルが非常に厳しいものへと達していることに注目している。財務データの国際比較を通してそのような競争状況をみると、日本 3 社が非常に好調な業績を達成している一方で、欧米メーカーの利益率の低下傾向、特にアメリカメーカーの厳しい実態が明らかとなってくる。また日本自動車部品メーカーについても、欧米を凌ぐ利益率を達成している一方、経営合理化が顕著に進展し、合理化する体力のある大企業への取引の集中化傾向が進展していることが窺える。最後に、ここ数年の購買政策の変化が示唆する諸問題について指摘し、締めくくりとする。

Changes in OEM Purchasing Policy in Japan: Some Suggestions from an International Comparison of Financial Data

The purpose of this report is to show changes in OEM purchasing policies in Japan and their impacts on global and domestic automotive and auto-parts industries. Particularly, it is noticed that introducing new purchasing policies in Japanese OEMs such as CCC21 and NRP lead to transforming the way of OEM's price setting into that way based on global benchmark. In consequence, global competitions are getting more and more intensified. With such a reality of global competitions observable through international comparison of financial data, it is obvious that Toyota, Honda and Nissan have achieved positive earnings, although profit ratios of Euro-American OEMs are in falling tone, especially American OEMs are in extreme difficulty. On the other hand, Japanese parts-makers also have achieved higher profit ratio than Euro-American firms. At the same time, rationalization in parts-makers and concentration of business to larger firms have developed notably. Finally, some issues caused by those changes in OEM purchase policies are pointed out.

Jürgen BISCHOFF (ユルゲン・ビショッフ)

Developments in the European Automotive Industry - Requirements and Challenges for OEMs and Suppliers

The global Automotive Industry is standing before major changes in the market and the structure of the whole industrial network. This was the overall conclusion in the study "Future Automotive Industry Structure" carried out by Fraunhofer and Mercer Management Consulting. Shifts in the value creation from OEM´s to suppliers and further consolidation accompanied with significant growth, especially in the supplier sector will be developments of the future. Therefore the European Automotive Industry has clarified the requirements and challenges for strengthening their global competitiveness. Some of the elements of their strategy, focused on research activities of the industry will be illustrated, especially common activities in the European Research area under the roof of the "5DayCar"-Initiative.

Richard KRACKLAUER (リヒャルド・クラックラウアー)

Changes in the Japanese Market – A Foreign Firm's View

The market structure of auto makers in Japan is described to have changed from a uniform keiretsu style to one with as many different approaches as there are participants. At one extreme the keiretsu network is deepened, at the other these networks are loosened. Potential suppliers need to understand this differentiated environment as well as the increasingly global nature of the industry. The Japanese makers integrated into global alliances cannot be seen in isolation as supplier performance (including price, quality, capacity etc.) in one market is immediately known throughout the network. Suppliers are increasingly assessed globally.

Despite these international networks, the expectations of Japanese makers have not really undergone a paradigm shift; suppliers are still often expected to just "build-to-print" – the traditional Japanese way which does not see the potential of having strong "development partners". The advantages of the system supplier concept need to be explained. Cost, quality and efficiency are parameters which are heavily influenced by specifications. In each case it must be evaluated whether given OEM specifications are really required, or whether standard global specifications provide better value at a similar or even better performance.

In order to be able to take advantage of modular systems offered by a system partner, OEMs must involve capable suppliers early in the concept stage. Respective

responsibilities between OEM and system partner must be newly defined for each project. While the OEM is not expected to buy "black boxes" he has to "let go" of certain activities that were traditionally his responsibility.
The advantages for the OEM of having strong system partners include reducing supplier interfaces, receiving "plug and play" modules for efficient assembly and elimination of duplication. The system supplier has the advantage of being able to actively influence and control his competitive environment by delivering efficiency, quality and cost advantages to OEMs.

日本の自動車産業の構成変更と外資系からの挑戦

日本の自動車メーカーの市場構造は、従来の系列スタイルから、競争相手がいる様々な方向からのアプローチを備えた形へと変わったと説明されます。極度に系列ネットワークが強化されたところもあれば、一方ではこれらのネットワークが緩和されたところもあります。潜在的なサプライヤーはインダストリのグローバルな性質の増加と同様に、この区別された環境も理解する必要があります。ひとつの市場のサプライヤーのパフォーマンス（価格、品質、生産能力などを含めて）を即座にネットワーク全体にわたって知られているので、グローバルアライアンスへ統合された日本のメーカーは、それを個別に見ることはできません。サプライヤーはますますグローバル的に評価されます。

これらの国際的なネットワークにもかかわらず、日本のメーカーは実際にパラダイム・シフトを期待していません。サプライヤーは、単なる「印刷図面の構築」をまだしばしば期待されます－強い「開発パートナー」を持つという可能性を見ない、従来の日本の方法です。システム・サプライヤー概念の利点について説明する必要があるということです。コスト、品質および効率は仕様書によって極度に影響を受けるパラメーターです。各ケースにより、与えられたOEM仕様書が実際に要求されるものか、また標準のグローバル仕様書が、同等かさらに良いパフォーマンスを提供できるかを評価しなければなりません。
システム・パートナーによって提示されたモジュールのシステムを利用することができるために、OEMは、概念の初期段階に有能なサプライヤーを従事されなければなりません。OEMおよびシステム・パートナーの間のそれぞれの責任は、各プロジェクトのために新しく定義されるに違いありません。OEMは「ブラックボックス」を買うことを期待されていませんが、サプライヤーに伝統的に自分の責任だったことを任せる必要があります。

強いシステム・パートナーを持っている OEM の利点はサプライヤー・インターフェースを縮小し、効率的なアセンブルの「プラグ・アンド・プレイ」モジュールを受け取ることや複製の除去を含みます。システム・サプライヤーは、OEMに効率、品質およびコストの利点を提供することにより、その競争率の高い環境に積極的に影響を及ぼしコントロールすることができることという長所を持ちます。

第2セッション『ローカルサプライヤーの空洞化前兆』
Session 2 "Hollowing-Out: Threats for the Local Suppliers?"

清 晌一郎（SEI Shoichiro）

日本自動車部品メーカーにおける継続的技術革新 —日本における空洞化へのインプリケーション—

日本自動車産業は空洞化にどう対応し得たのか。この問題について、日本自動車産業を取り巻く競争条件の変化とそれへの対応を解明することによって解答を探る。報告内容は以下の通り。① 自動車メーカーの購買政策変化の影響＝ベンチマークの導入、グローバル購買の影響、② 中国における「高品質と低コスト」の実態、③ 電機メーカーの中国でのセル生産の導入事例、④ コストと品質目標達成の鍵＝標準作業の作成、⑤ 日本企業における技術開発の新しい取り組み、⑥ 日本メーカーの高品質追求＝歴史の王道を歩んでいるのか、あるいは「蛸壺」Octopus pot (Trap) にはまったのか？

古川 澄明（FURUKAWA Sumiaki）

自動車産業拠点の中欧へのシフトとドイツに立地条件の行方：自動車部品産業の事例

河村 英明（KAWAMURA Hidekai）

The Automotive Industry Shift to Eastern Europe and China: Dim Prospects for Germany?

Overall, the US and European automotive industry is struggling with increased global competition, overcapacity and high raw material costs. Some OEM have steadily lost global market share to rivals in the past decade. While US industry volumes are at historic highs, profitability is poor. Supplier are also coming under pressure from OEMs to cut prices, assume more vehicle warranty costs and financing of R&D-projects. The OEMs in the US and in Europe, already bruised by Japan and Korea, may be further challenged by new entrants from China and possibly India. While demand in Americas and Europe is growing at around half percent, OEMs continue to increase production capacity. The market in China is growing exponentially, but is more than matched by increase production capacity in that country. Some OEMs will not survive independently. There is likely to be further consolidation of the Tier 1 suppliers...

第3セッション『クラスター：新しい生産性への道』
Session 3 "Cluster – a Way to New Productivity?""

Heinz-Jürgen KLEPZIG （ハインツ-ユルゲン・クレプチヒ）
Automotive Clusters in Germany – Tasks for Small & Medium Enterprises
It´s not easy to be a SME and work as a supplier in the automotive sector in Germany today. "Going East" is a motto, practised by car makers and their larger suppliers, that in general cannot be chosen by a SME: the reason is lack of resources! The threats then are: stay home and lose market. The situation seems to be very similar to that of Japanese SME´s: "Going Offshore" obviously is the motto for Japanese OEM´s and their larger suppliers. The cooperation of several SME´s in a "cluster" is a very promising way to become more competitive. The paper gives a general overview of the situation of German SME´s, their tasks and the imperatives for clusters, to get an advantaged position.

Gert HERRMANN （ゲルト・ヘルマン）
The Easter German Automotive Cluster-A Japanese Supplier's Perspective
After unification of Germany in 1990 a redevelopment of the Automotive Industry in Eastern Germany took place. The paper will highlight this rapid growth and it will reflect some experience a Japanese company has made as a member of this new industrial society. The paper will finish in an attempt to encourage more Japanese companies to set up production in Eastern Germany. Although the current trend is favouring other areas in the world for new investment.

辻 正次 （TSUJI Masatsugu）
日本の自動車産業クラスター／愛知県
In manufacturing one automobile, approximately 30,000 to 40,000 parts are required, therefore, it is essential for the automobile assembler to integrate and efficiently manage manufacturers who supply these parts. This paper presents Toyota's production structure in detail. By taking Toyota Motor Corporation as an example, the Japanese hierarchical production system is examined in comparison with the U.S. production system, which is referred to as the non-hierarchical production system. According to the principal-agent theory, two production systems are compared; especially the superiority of the former to the latter is focused from the viewpoints of information, efficiency, and incentive. Based on this analysis, the heavy concentration or localization of the automobile industry in Aichi Prefecture, especially the Nishi-Mikawa region will be discussed. Since the 1990s, the Japanese economy has undergone transformation such as an information society and globalization, and this paper analyzes how Toyota and its parts suppliers have been coping with these changes, so as to maintain vitality.

＊＊＊＊＊＊＊

木谷 哲夫（マッキンゼー・アンド・カンパニー）

KITANI Tetsuo: Associate Principal, McKinsey & Company

Tetsuo KITANI is an associate principal in McKinsey's Tokyo office. He joined the Tokyo office in October 1999 and is one of the leaders of the Automotive and Assembly Practice and Operations Practice. Kitani is a graduate of the Faculty of Laws at the University of Tokyo and has an M.B.A. from the Wharton School, University of Pennsylvania. Prior experience before joining McKinsey includes work at the Industrial Bank of Japan. His work focuses primarily on cost optimization, design-to-cost, procurement strategy, change management, and new product development for automotive and other manufacturing companies.

Jochen LEGEWIE: President and Representative Director, CNC

ヨッヘン・レゲヴィー　（CNC 株式会社）

Dr. Jochen Legewie is President and Representative Director of CNC-Communications and Network Consulting Japan K.K. He has been head of corporate communications at Mitsubishi Motors Corporation headquarters until June 2004. Until February 2001, he was Deputy Director of the German Institute of Japanese Studies in Tokyo also heading the economic section. He also worked at Keidanren and as a freelance journalist for a number of years. He had studied economics in Cologne and at Hitotsubashi University in Tokyo and was awarded his PhD in economics from Cologne University. A fluent speaker of Japanese, he has written numerous books on economic and business matters and has widely published in various German, English and Japanese journals.

青木 克生（関東学院大学）

AOKI Katsuki: Associate Professor, Kantogakuin University

現職は関東学院大学経済学部助教授であり、明治大学で博士(経営学)を取得している。最近の論文としては、「自動車・同部品産業における経営動向の国際比較分析」『月刊自動車部品』別冊，2004 年 11 月号、「欧州自動車産業におけるモジュール化の批判的検討」『日本経営学会誌』第 11 号、2004 年がある。最近の研究では、自動車・同部品産業の国際的再編がもたらすインパクトに焦点を当てている。

Professor Dr. Katsuki Aoki is an Associate Professor in the Faculty of Economics, Kanto Gakuin University. He received his Ph.D. in business administration from Meiji University. His recent articles include "An International Comparison of Business Climate in Automotive and Auto-Parts Industries" in *Monthly Automotive Parts*, November, 2004", A Critical Study on Modularization of European Automotive Industry" in *Journal of Business Management*, No.11, 2004. His current research focuses on the impacts of restructuring in global automotive and auto-parts industries.

Jürgen BISCHOFF: Member of the Managing Committee,
Fraunhofer Institute for Manufacturing Engineering and Automation
ユルゲン・ビショッフ：（生産ｴﾝｼﾞﾆｱﾘﾝｸﾞ・自動化フラウンホファー研究所）
Dr. Jürgen Bischoff is member of the Institute Management Committee of the Fraunhofer Institute for Manufacturing Engineering and Automation (Fraunhofer IPA). He is responsible for the research areas of enterprise organisations and enterprise logistics. Dr. Bischoff is also teaching Operations Management and Manufacturing Systems Planning at the University of Stuttgart and the Stuttgart Institute of Management and Technology His expertise, built up during 14 years at the Fraunhofer IPA is based on various industry projects in branches like electronics, engineering, optics and especially in the automotive sectors. His current research focus is especially dedicated to the automotive industry and future oriented strategies in network structures and logistics solutions. Since 2004 he leads the research area of flexible Networks and Logistics in the European based research project ILIPT (Intelligent Logistics for Innovative Product technologies).

Richard KRACKLAUER: President, Sachs Automotive Japan Corporation
リヒャルド・クラックラウアー（ザックス･オートーモーティブ･ジャパン株式会社）
Mr. Kracklauer is the President of Sachs Automotive Japan Corporation. He started his career in Japan 1989 and held top management functions at BMW Japan, ITT Automotive Japan and Mannesmann VDO Japan. At the European Business Community (EBC) he is Chairman of the Automotive Components Committee. He is also a member of the Executive Committee of the Japan American Automotive Group (JAAG) having been its Vice Chairman. He holds a degree in Electrical Engineering (Munich, Germany).
ザックス・オートモーティブ・ジャパン株式会社の代表取締役社長。1989 年より日本の BMW ジャパン、ITT オートモーティブ ジャパンおよびマンネスマン VDO ジャパンで管理職として活躍し、欧州ビジネス協会(EBC)では自動車部品委員会の委員長、米国自動車製品日本協議会(JAAG)の執行委員会のメンバーでもあり副議長も務めた。電気工学（ミュンヘン、ドイツ）の学位を取得。

Fabrizio MURA: Deputy General Manager, EU-Japan Centre for Industria Cooperation
ファブリツィオ・ムラ（日欧産業協力センター）
Dr. Fabrizio Mura is Deputy General Manager and Chief Information Officer at the EU-Japan Centre for Industrial Cooperation, Tokyo. While working with the EU-Japan Centre after obtaining his PhD, Fabrizio Mura was also active as part-time lecturer at the department of International Business, Aoyama Gakuin University, from 2000 to 2003. He attended the business course of the Japan Market Entry Competition (JMEC) in 2000 and is currently completing the executive MBA at the Graduate School of Business, University of Chicago. Fabrizio Mura has been a member of the Business Intelligence

Society of Japan (BIS Japan) since 1999, and of the Japan Academy of Foreign Trade (JAFT) since 2000.

清 晌一郎（関東学院大学）

SEI Shoichiro: Professor, Kantogakuin University

関東学院大学教授、経済政策論担当。他に産業論、中小企業論などを講義。自動車を始め、機械工業の産業分析の他、企業間取引関係の国際比較研究を専門としている。1970 年代末より自動車、電機を中心に世界中の企業調査を実施、特に日系進出企業を系統的に調査してきた。この間、MIT の IMVP の他、パリ大学、リオン第二大学、ベルリン自由大学、ベルリン社会科学研究所、ミュンヘン社会科学研究所などとの共同研究に参加。「基本要素の確立による生産のシステム化（Stamping the Foundation for Systematization、1992」のほか、論文多数。

古川 澄明（山口大学）

FURUKAWA Sumiaki: Professor, Yamaguchi University

山口大学教授。専攻はドイツ自動車産業史研究。1995 年から 1999 年まで、山口大学の中国自動車産業調査プロジェクトに参加する。2000 年以来、Erlangen-Nuernberg 大学社会学研究所自動車研究チームとタイアップして、日本側グループリーダーとして、日独自動車産業調査を行う。2002 年以来、欧州自動車産業プロジェクトのリーダーとして中東欧自動車産業調査を実施する。

河村 英明（アーンスト アンド ヤング）

KAWAMURA Hideaki: Director, M&A Advisory,
Ernst & Young Global Financial Service Co., Ltd.

英国 City University Business School 修了（MBA 経営学修士号取得）現在、4 大国際会計事務所の一つである Ernst & Young のコーポレートファイナンスを提供するアドバイザリー会社アーンストアンドヤング グローバルフィナンシャルサービス株式会社にて M&A アドバイザリー部を統括。2003 年に PricewaterhouseCoopers より移籍し現職に就任。自動車・エレクトロニクスを始めとする製造業における国内及びクロスボーダーM&A アドバイザリー業務を多数経験。

Hideaki Kawamura is a head of M&A advisory with the Transaction Advisory Services of Ernst & Young Global Financial Services. He joined the team January 2003 from PricewaterhouseCoopers Financial Advisory Services, an M&A consulting arm of PwC, where he was primarily engaged in M&A/Alliance/Buyout advisory businesses for automotive and manufacturing industries. Hideaki Kawamura holds MBA degree from City University Business School in London.

Christian BLANK: Director, IIC - Industrial Investment Council Tokyo
クリスチャン・ブランク （IIC-東部ドイツ産業投資公社）
Mr. Blank is a Director with the IIC - Industrial Investment Council and Head of the IIC-Tokyo Office, which he established beginning of 2004. Before his current assignment, he worked for the Automotive Team in the Berlin Headoffice for two years. Prior to joining the IIC Mr. Blank worked as a consultant in the Automotive Department of Roland Berger - Strategy Consultants in Stuttgart, Germany. He received his German business administration degree (Dipl.-Kaufmann) from the Leipzig Graduate School of Management (HHL), and his MBA from Ohio University in the United States. He also studied at the University of Kiel in Germany and Chulalongkorn University (Sasin) in Bangkok, Thailand.

Heinz-Jürgen KLEPZIG: Professor, Augsburg University of Applied Sciences
ハインツ-ユルゲン・クレプチヒ（アウクスブルグ単科大学）
Heinz-Jürgen Klepzig is a Professor of Logistics at the University of Applied Sciences in Augsburg, Germany. He got degrees as Diplom-Ingenieur both in machinery and economics. After working in the field of R&D, where he got his PhD, he became consultant and worked as managing director in one of the largest German consulting companies. He specialized on the implementation of strategies. His research focuses on the automotive sector, esp. the situation of suppliers including SME`s.

Gert HERRMANN: formerly Managing Director, Takata Europe GmbH
ゲルト・ヘルマン（前タカタ・ペトリ社）
Gert Herrmann has graduated as Diplom-Ingenieur in Mechanical Engineering. He started his career in 1969 in Aerospace as a Design Engineer for Engine Systems. In 1982 he changed from Aerospace to the automotive sector. His career went from Chefingenieur for Brake Systems to Deputy Board Member of GKN Transmissions. In 1985 he became Managing Director of VISCODRIVE GmbH an enterprise of GKN. After he left GKN in 1992 as the Director of Application Engineering he became Managing Director of TAKATA (Europe)GmbH. He hold this position up to 2003. Since 01.01.2004 he is retired.

辻 政次（大阪大学大学院）
TSUJI Masatsugu: Professor, Osaka University
TSUJI Masatsugu is Professor of Economics, Osaka School of International Public Policy (OSIPP), Osaka University. Current research focuses on the Economics of Tele-medicine. Awarded for excellence of paper presented at the "Tele-port '96 Tokyo" Conference of the 12th Meeting of the World Tele-port Association in May 1996; and also awarded for excellence of paper by the Japan Society of Information and Communication Research in June 1998. Publications include The Internet Revolution (ed. with Giovannetti and Kagami), Cambridge University Press, 2003, Information Technology Policy and the Digital Divide: Lessons for Developing Countries, (ed. with Kagami & Giovannetti), 2004, Private Initiatives in Infrastructure: Priorities, Incentives, and Performance, (ed. with Berg & Pollitt), 2002, and Privatization, Deregulation, and

Economic Efficiency, (ed. with Kagami) 2000: those four were published by Edward Elgar. Received a B.A. in Economics from Kyoto University; M.A. in Economics from Osaka University; and Ph.D. in Economics from Stanford University, U.S.A. He also serves as a member of the International Advisory Committee, Public Utility Research Center (PURC), University of Florida, U.S., and of Information and Telecommunications Council, the Government of Japan. He has been implementing international distance learning via ISDN between Osaka and Thammasat Universities, Thailand since 2002 by transmitting lecture series on IT and its applications.

Andreas MOERKE: Senior Research Fellow, German Institute for Japanese Studies
アンドレアス・メルケ（ドイツ-日本研究所）
Andreas Moerke is Senior Research Fellow at the Economics and Management Section of the German Institute for Japanese Studies. Prior to joining the DIJ, he worked as a business consultant, and still is auditor in a stock corporation. Moerke holds an M.A. in Japanese Studies and PhD in Management, both from Humboldt University. His main research areas are industrial organization and the comparison of corporate governance systems, and Dr. Moerke has been publishing extensively in these fields. Writings include the articles "Rumble in the Boardroom? The Change of Japanese Corporate Governance Schemes", ZJapanR Vol. 8 No. 15; 「三菱自動車への支援を拒否したダイムラー・クライスラー監査役会」ビジネス法務（中央経済社）2004 年 10 月号 and „Japans Automobilzulieferindustrie im Wandel" [The Changing Japanese Automotive Supplier Industry] (forthcoming).

****