

Les modes de coordination dans le processus de régionalisation des multinationales japonaises en Europe

*Coordination modes within the regionalization process of Japanese
multinationals in Europe*

Thèse de doctorat de l'université Paris-Saclay

École doctorale n° 630 : Droit Economie Management (DEM)

Spécialité de doctorat : Sciences de Gestion

Graduate School : Economie & Management

Référent : Université de Versailles-Saint-Quentin-en-Yvelines

Thèse préparée dans l'unité de recherche **LAREQUOI** (Université Paris-Saclay, UVSQ),
sous la direction de **Gilles ROUET**, Professeur des Universités,
le co-encadrement de **Stela RAYTCHEVA**, Maître de Conférences HDR.

Thèse soutenue à Guyancourt, le 16 novembre 2022, par
Louis-Caleb REMANDA

ANNEXES

Composition du Jury

Membres du jury avec voix délibérative

Philippe HERMEL

Professeur des Universités

Université Versailles Saint Quentin-en-Yvelines/Paris Saclay

Président du Jury

Jacques JAUSSAUD

Professeur des universités

Université de Pau et des Pays de l'Adour (UPPA)

Rapporteur & Examineur

Sophie NIVOIX

Maître de conférences HDR

Université de Poitiers

Rapporteuse & Examinatrice

Shinji HASEGAWA

Professeur en Management International

Université de Waseda (Japon)

Examineur

Annexe 1

Guide d'entretien confirmatoire

INTERVIEW

– Interviewee Name –
Interviewee Function

Greetings

- Short presentation of the project and interest in the organization
- Explanation of the interview
- Possibility to record: Phone or Pro Recorder

i) Profile - Evolution within the company

- a. Academic background
- b. Professional career: How do you arrived at that position?

ii) The vision of the organization to the world

- a. History? Business model, competitor
- b. **Vision: Long, Middle and Short Term**
 - i. What does it mean concretely to the customer? the employees? local governments?
- c. Principles of the organizations: How these principles are communicated to employees? To local communities

iii) Profile - Position within the company: As your function entitled you...

- a. What is your role within the group?
- b. What are the daily functions you lead in the European headquarters?
- c. Is there any project you are currently working on?

iv) The European regional headquarters (RHQ) in its internal environment

- a. Presence in the region: what are the motivations that led the company to implant itself to these countries?
- b. The market
- c. In terms of staff
- d. How do you implement that vision on the daily basis of employees?

v) The European RHQ and its relations with the local/regional environment

- a. Do you think the demand is more local (national) or regional?
- b. What is the local challenge of the market you are targeting?
- c. Can you meet this challenge alone or do you work with companies?
- d. Within the sector in which you operate?

vi) The European RHQ and the European institutions

- a. Are you in touch with other market players such as?
- b. Thoughts on the Economic Partnership Agreement in the European Union and Japan

ENTRETIEN

- Nom de l'interviewé -

Fonction de l'interviewé

Salutations

- Brève présentation du projet et de l'intérêt pour l'organisation
- Explication de l'entretien
- Possibilité d'enregistrer : Téléphone ou enregistreur pro

i. Profil - Evolution au sein de l'entreprise

- a. Formation académique
- b. Evolution professionnelle : Comment êtes-vous arrivé à ce poste ?

ii. La vision globale de l'organisation

- a. Historique
- b. Vision : Long, moyen et court terme
 - i. Que signifie-t-elle concrètement pour le client ? les employés ? les collectivités locales ?
- c. Principes de l'organisation : Comment ces principes sont-ils communiqués aux employés ? Aux communautés locales

iii. Profil - Position au sein de l'entreprise : Votre fonction vous autorise à...

- a. Quel est votre rôle au sein du groupe ?
- b. Quelles sont les fonctions quotidiennes que vous dirigez au siège européen ?
- c. Y a-t-il un projet sur lequel vous travaillez actuellement ?

iv. Le siège régional européen (RHQ) dans son environnement interne

- a. Présence dans la région : quelles sont les motivations qui ont conduit l'entreprise à s'implanter dans ces pays ?
- b. Le marché
- c. En termes de personnel
- d. Comment mettez-vous en œuvre cette vision dans le quotidien des employés ?

v. Le RHQ européen et ses relations avec l'environnement local/régional

- a. Pensez-vous que la demande est plutôt locale (nationale) ou régionale ?
- b. Quel est le défi local du marché que vous visez ?
- c. Pouvez-vous relever ce défi seul ou travaillez-vous avec des entreprises ?
- d. Au sein du secteur dans lequel vous opérez ?

vi. Le RHQ européen et les institutions européennes

- a. Êtes-vous en contact avec d'autres acteurs du marché tels que ?
- b. Réflexions sur l'accord de partenariat économique entre l'Union européenne et le Japon

Annexe 2

**Architecture du codage a priori des données
empiriques - NVivo 11**

Nœuds

Nom			
[-]	Entrée stratégique de la multinationale		
[-]	Culture organisationnelle		
	Histoire de la multinationale		
	Influence du leader		
	Mission de l'organisation		
	Pratiques organisationnelles		
	Principes et valeurs		
	Vision & Stratégie de l'organisation		
[-]	Modèle de décision		
	Stratégie centralisée par le siège global		
	+ Stratégie décentralisée du siège global		
	Stratégie en collaboration avec le siège global		
[-]	Initiatives du Manager		
[-]	Histoire de l'interviewé		
	Nationalité		
	Parcours académique		
	+ Parcours professionnel		
[-]	Initiatives du manager		
	Initiatives externes au groupe		
	Initiatives internes à la filiale		
[-]	Perception personnelle de l'organisation		
	Perception de la vision		
	Perception de son rôle		
	Perception des principes de la MNE		
	Perception du positionnement		
[-]	Position dans l'organisation		
	Relation avec hiérarchie inférieure		
	Relation avec la hiérarchie supérieure		
	Relations avec autres départements		
	Rôle au sein de l'organisation		
	Rôle au sein de la multinationale		
[-]	Le développement de la filiale à l'étranger		
[-]	Avantages ou Ressources clés		

Nœuds

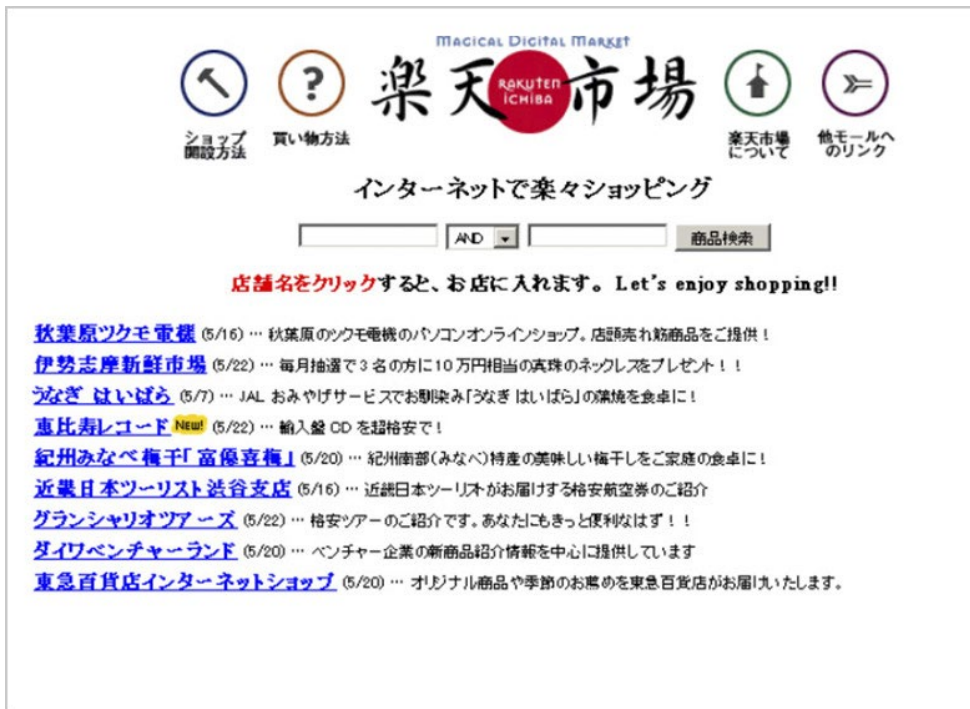
Nom			
<input type="radio"/>	Internationalisation		
<input type="radio"/>	Localisation		
<input type="radio"/>	Propriété		
<input type="checkbox"/>	Relation avec la maison-mère		
<input type="checkbox"/>	<input type="radio"/> Actions de la filiale dans le groupe multinationale		
<input type="checkbox"/>	<input type="radio"/> Rôle du siège sur la filiale		
<input type="checkbox"/>	Structure de la filiale		
<input type="checkbox"/>	<input type="radio"/> Demande		
<input type="checkbox"/>	<input type="radio"/> Effectif et Nationalité		
<input type="checkbox"/>	<input type="radio"/> Stratégie d'intégration		
<input type="checkbox"/>	Relations institutionnelles		
<input type="checkbox"/>	<input type="radio"/> Au niveau global		
<input type="checkbox"/>	<input type="radio"/> Au niveau local		
<input type="checkbox"/>	<input type="radio"/> Au niveau régional		

Annexes 3 -11

Logos, Organigrammes & Visuels

Rakuten

The Rakuten logo consists of the word "Rakuten" in a bold, red, sans-serif font. A red horizontal bar is positioned below the letters "a", "k", and "u", extending from the left side of the "a" to the right side of the "u".



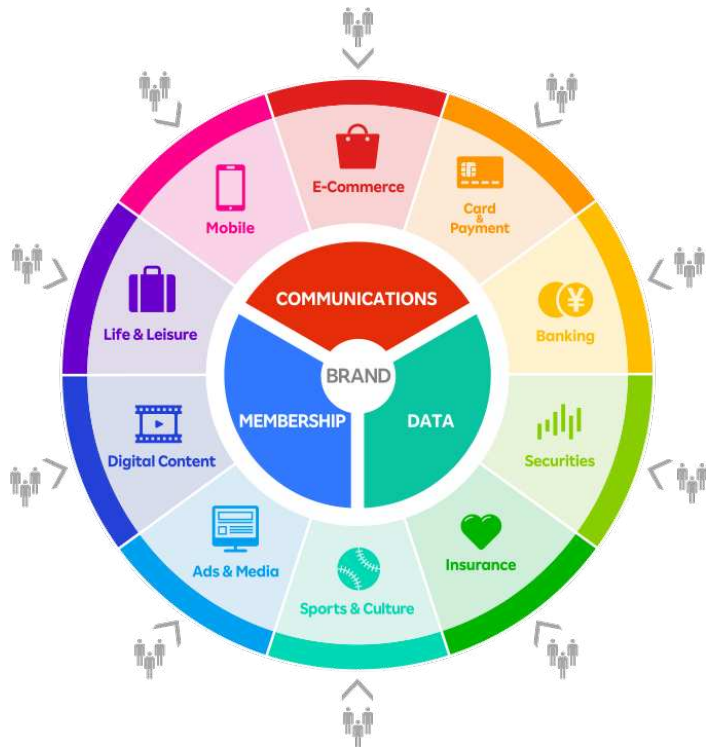
Annexe 3. Capture d'écran - Magical Digital Market, Inc. (MDM)



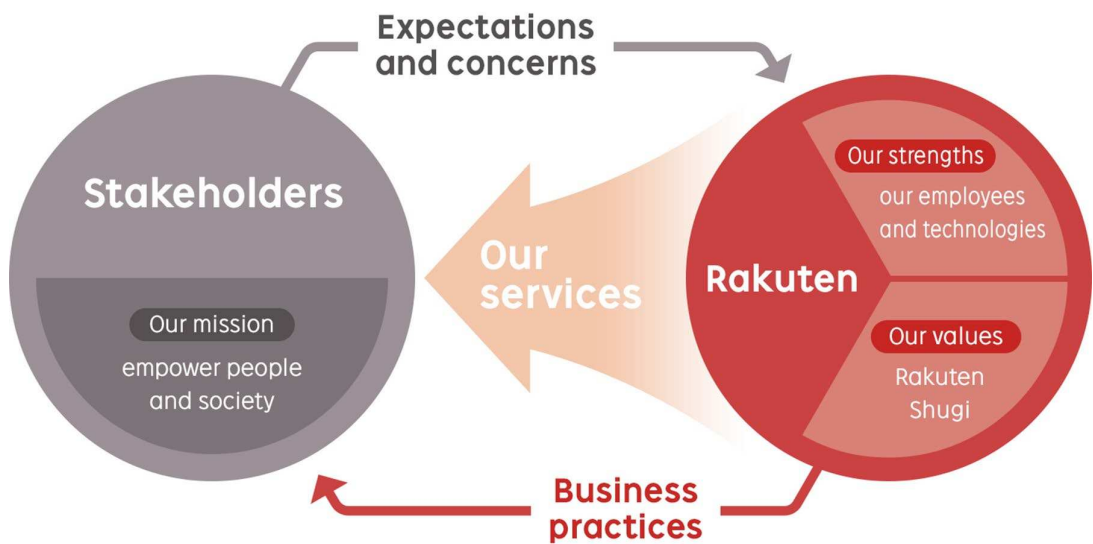
Annexe 4. Logo – Rakuten Incorporated (1999 à 2017)



Annexe 5. Logo – Rakuten Incorporated (depuis 2017)



Annexe 6. Rakuten Ecosystem (2006)



Annexe 7. Vision - Rakuten « Empowerment »

Brand Concepts

大義名分

-On a Mission: Empowerment-

品性高潔 *En Mission d'Autonomisation*

-Behave Ethically: Integrity-

用意周到 *Un comportement éthique*

-Prepare to Succeed: Professionalism-

信念不拔 *Un professionnalisme dans le succès*

-Complete Commitment: Get Things Done-

一致團結 *Un engagement entier*

-Solidarity: Succeed as a Team-

Un succès solidaire

Five Principles for Success

Always Improve, Always Advance

Passionately Professional

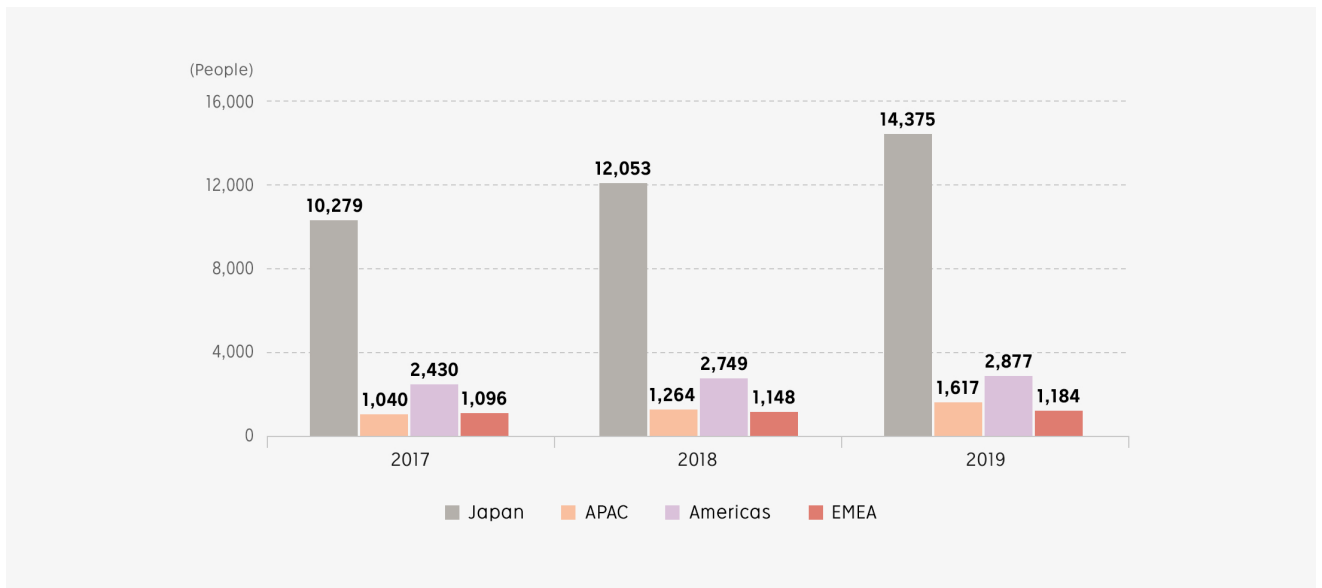
Hypothesize → Practice →

Validate → Shikumika

Maximize Customer Satisfaction

Speed!! Speed!! Speed!!

Annexe 8. Philosophie - Rakuten Shugi



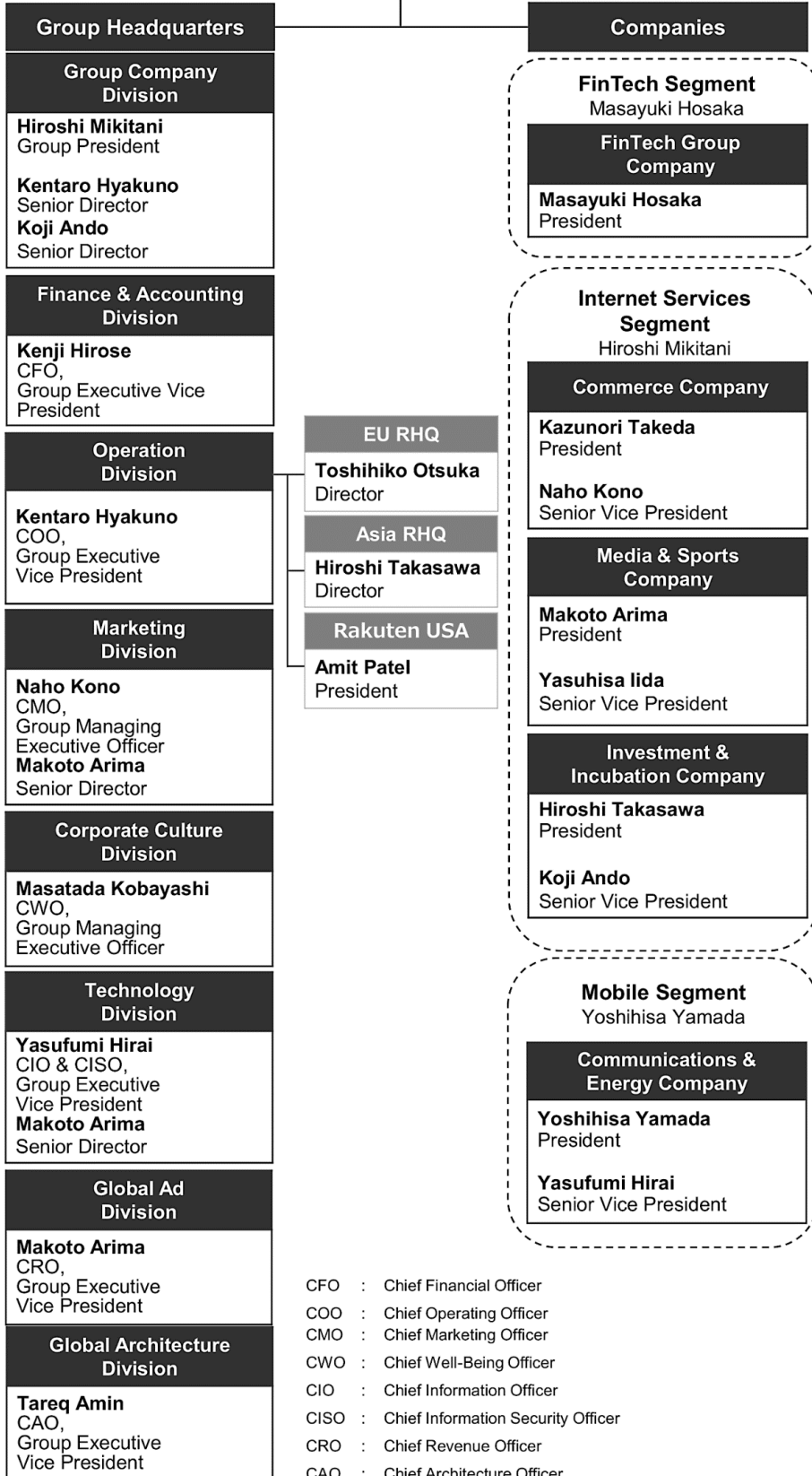
Annexe 9. Diversité – Effectif global de Rakuten Inc.

Current logo	New Logo
	
	
	
	
	
	
	
	
	
	
	
	

Annexe 10. Marque – Refonte de la marque Rakuten et de ses activités

Hiroshi Mikitani
Chairman and CEO

Masayuki Hosaka
Vice Chairman



Annexe 12

**Relevé des Activités Consolidées de
Rakuten Group
2008-2012**

*Un focus sur les activités européennes et leur contrôle par la maison
mère Rakuten Inc. Dossier constitué par l'auteur.*

Rakuten

Consolidated Subsidiaries and Affiliated Companies

(As of December 31, 2008)

Name	Location	Capital or investment (Millions of yen)	Type of business	Voting rights or ownership (%)	Note
Consolidated Subsidiaries					
Rakuten Auction, Inc.	Shinagawa-ku, Tokyo	1,650	E-Commerce Business	60.0	
Rakuten Enterprise Inc.	Shinagawa-ku, Tokyo	10	E-Commerce Business	100.0	
Signature Japan Co., Ltd.	Shinagawa-ku, Tokyo	80	E-Commerce Business	100.0	
Fine Wine Co., Ltd.	Shinagawa-ku, Tokyo	205	E-Commerce Business	100.0	
LinkShare Corporation	U.S.A.	1 U.S. dollars	E-Commerce Business	100.0 (100.0)	5
LinkShare International, LLC	U.S.A.	2,640 thousand U.S. dollars	E-Commerce Business	100.0 (100.0)	5
LinkShare Ltd.	U.K.	1 U.K. pounds	E-Commerce Business	100.0 (100.0)	5
Rakuten USA, Inc.	U.S.A.	182 U.S. dollars	E-Commerce Business	100.0	
CauseLoyalty, LLC	U.S.A.	—	E-Commerce Business	100.0 (100.0)	5
Keiba Mall, Inc.	Shinagawa-ku, Tokyo	499	E-Commerce Business	100.0	
CASAREAL, inc.	Chuo-ku, Tokyo	146	E-Commerce Business	46.7	
Rakuten Europe S.a.r.l.	Luxembourg	625 thousand EUR	E-Commerce Business	100.0	2

- Notes:**
1. Business segments are used to indicate the type of business.
 2. The company became a group member during the fiscal year ended December 31, 2008.
 3. Indirectly held voting rights are shown in parentheses.
 4. Voting rights held by parties close to Rakuten or that support Rakuten's policies, but not included in the voting rights percentage, are shown in square brackets.
 5. LinkShare Corporation and CauseLoyalty, LLC are subsidiaries of Rakuten USA, Inc. In addition, LinkShare International, LLC is a subsidiary of LinkShare Corporation, and LinkShare Ltd. is a subsidiary of LinkShare International, LLC.
 6. Cyber Brains (Shanghai) Consulting Co., Ltd. is a subsidiary of Rakuten Research, Inc.
 7. Warehouse Co., Ltd., is a subsidiary of Rakuten KC Co., Ltd.
 8. RAKUTEN TRAVEL KOREA CO., LTD., Rakuten Bus Services Inc. and Rakuten Travel Guam, Inc. are subsidiaries of Rakuten Travel, Inc.
 9. Rakuten Securities, Inc., Rakuten Asset Management Co., Ltd., Rakuten Strategic Partners Co., Ltd., Rakuten Investment Trust Co., Ltd., Commodity, Inc. and Polestar Asset Management, Inc. are subsidiaries of Rakuten Securities Holdings, Inc.
 10. Rakuten Sports Properties, Inc. is a subsidiary of Rakuten Baseball, Inc.
 11. Fusion Network Services Corp. and TNet Service Company, Incorporated are subsidiaries of FUSION COMMUNICATIONS CORPORATION.
 12. LinkShare Japan K.K. is an equity-method affiliate of LinkShare International, LLC.
 13. Denotes companies required to submit financial reports and securities registration statements according to Japanese securities and exchange legislation.
 14. This is a special-purpose company.
 15. The company's liabilities exceed its assets by 4,307 million yen.
 16. Net sales of Rakuten KC Co., Ltd. and FUSION COMMUNICATIONS CORPORATION (excluding internal sales between consolidated subsidiaries) account for over 10% of consolidated net sales.

Consolidated Subsidiaries and Affiliated Companies

(As of December 31, 2010)

Name	Location	Type of business	Voting rights or ownership (%)	Note
Consolidated Subsidiaries				
Rakuten Auction, Inc.	Shinagawa-ku, Tokyo	E-Commerce Business	60.0	
Rakuten Enterprise, Inc.	Shinagawa-ku, Tokyo	E-Commerce Business	100.0	
Signature Japan Co., Ltd.	Shinagawa-ku, Tokyo	E-Commerce Business	100.0	
Fine Trading Co., Ltd.	Shinagawa-ku, Tokyo	E-Commerce Business	100.0	
LinkShare Corporation	U.S.A.	E-Commerce Business	100.0 (100.0)	5
LinkShare International, LLC	U.S.A.	E-Commerce Business	100.0 (100.0)	5
LinkShare Ltd.	U.K.	E-Commerce Business	100.0 (100.0)	5
Rakuten USA, Inc.	U.S.A.	E-Commerce Business	100.0	
Keiba Mall, Inc.	Shinagawa-ku, Tokyo	E-Commerce Business	100.0	
Rakuten Europe S.a.r.l.	Luxembourg	E-Commerce Business	100.0	2, 15
Taiwan Rakuten Ichiba Inc.	Taiwan	E-Commerce Business	51.0	
Net's Partners CO., Ltd.	Shinagawa-ku, Tokyo	E-Commerce Business	100.0	
FreeCause, Inc.	U.S.A.	E-Commerce Business	100.0 (100.0)	5
Rakuten (Thailand) Co., Ltd.	Thailand	E-Commerce Business	100.0	
TARAD Dot Com Co., Ltd.	Thailand	E-Commerce Business	67.0 (67.0)	6
Rakuten Shigoto Shoukai, Inc.	Shinagawa-ku, Tokyo	E-Commerce Business	100.0	2
LinkShare Hong Kong Ltd.	Hong Kong	E-Commerce Business	100.0	2, 5
LinkShare Japan K.K.	Shinagawa-ku, Tokyo	E-Commerce Business	63.8 (27.5)	
Rakuten Logistics, Inc.	Shinagawa-ku, Tokyo	E-Commerce Business	100.0	2
Buy.com Inc.	U.S.A.	E-Commerce Business	100.0 (100.0)	2, 5
BuyServices Inc.	U.S.A.	E-Commerce Business	100.0 (100.0)	2, 5
PRICEMINISTER S.A.S.	France	E-Commerce Business	100.0 (100.0)	2, 7

- Notes:**
1. Business segments are used to indicate the type of business.
 2. The company became a group member during the fiscal year ended December 31, 2010.
 3. Indirectly held voting rights are shown in parentheses.
 4. Voting rights held by parties close to Rakuten or that support Rakuten's policies; but not included in the voting rights percentage, are shown in square brackets.
 5. LinkShare Corporation, FreeCause, Inc. and Buy.com Inc. are subsidiaries of Rakuten USA, Inc. LinkShare International, LLC is a subsidiary of LinkShare Corporation, and LinkShare Ltd. and LinkShare Hong Kong Ltd. are subsidiaries of LinkShare International, LLC. BuyServices Inc. is a subsidiary of Buy.com Inc.
 6. TARAD Dot Com Co., Ltd is a subsidiary of Rakuten (Thailand) Co., Ltd.
 7. PRICEMINISTER S.A.S. is a subsidiary of Rakuten Europe S.a.r.l. In addition, Voyager moins Cher S.A.S., A Vender A Louer S.A.S. and TMG MEDIA GROUP S.A.S. are subsidiaries of PRICEMINISTER S.A.S.
 8. Lektian Co., Limited is a subsidiary of RakuBai Limited.
 9. Kajiyama Warehouse Co., Ltd., is a subsidiary of Rakuten KC Co., Ltd.
 10. Rakuten Mortgage Co., Ltd., Rakuten Bank Systems, Ltd. and eBANK Capital Management (Cayman) Ltd. are subsidiaries of Rakuten Bank, Ltd.
 11. RAKUTEN TRAVEL KOREA CO., LTD., Rakuten Bus Services Inc. and Rakuten Travel Guam, Inc. are subsidiaries of Rakuten Travel, Inc.
 12. E-Money Marketing United, LLP is an equity-method affiliate of bitWallet, Inc.
 13. SOURCENEXT CORPORATION is an equity-method affiliate of RS Empowerment, Inc.
 14. Denotes companies required to submit financial reports and securities registration statements according to Japanese securities and exchange legislation.
 15. This is a special-purpose company.
 16. Net sales of Rakuten KC Co., Ltd. (excluding internal sales between consolidated subsidiaries) account for over 10% of consolidated net sales.

Consolidated Subsidiaries and Affiliated Companies

(As of December 31, 2011)

Name	Location	Ownership (%)	Note
Consolidated Subsidiaries			
Internet Services Segment			
Rakuten Auction, Inc.	Japan	60.0	
Signature Japan Co., Ltd.	Japan	100.0	
Fine Trading Co., Ltd.	Japan	100.0	
LinkShare Corporation	U.S.A.	100.0	2
LinkShare International LLC	U.S.A.	100.0	2
LinkShare Ltd.	U.K.	100.0	2
Rakuten USA, Inc.	U.S.A.	100.0	
Keiba Mall, Inc.	Japan	100.0	
Rakuten Europe S.a.r.l.	Luxembourg	100.0	6
Taiwan Rakuten Ichiba Inc.	Taiwan	51.0	
Net's Partners Co., Ltd.	Japan	100.0	
FreeCause, Inc.	U.S.A.	100.0	2
Rakuten (Thailand) Co., Ltd.	Thailand	100.0	
TARAD Dot Com Co., Ltd.	Thailand	67.0	
Rakuten Shigoto Shoukai, Inc.	Japan	100.0	
LinkShare Hong Kong Ltd.	Hong Kong	100.0	2
LinkShare Japan K.K.	Japan	63.8	
Rakuten Logistics, Inc.	Japan	100.0	
Buy.com Inc.	U.S.A.	100.0	2
BuyServices Inc.	U.S.A.	100.0	2
PRICEMINISTER S.A.S.	France	100.0	3
Voyager moins Cher S.A.S.	France	100.0	3
TMG MEDIA GROUP S.A.S.	France	100.0	3
RakuBai Limited	Hong Kong	51.0	
Lekutian Co., Limited	People's Republic of China	100.0	
Lekutian ICP	People's Republic of China	—	
Target, Inc.	Japan	100.0	
Rakuten Research, Inc.	Japan	100.0	
Rakuten Shashinkan, Inc.	Japan	100.0	
RAKUTEN SHOWTIME, Inc.	Japan	100.0	
PT RAKUTEN INDONESIA	Indonesia	100.0	1
PT. Rakuten-MNC	Indonesia	51.0	1
China Rakuten Network Science and Technology Co.,Ltd	People's Republic of China	100.0	1
Rakuten Brazil Holdings LTDA.	Brazil	100.0	1
RAKUTEN BRASIL INTERNET SERVICE LTDA.	Brazil	90.0	1
Tradoria GmbH	Germany	100.0	1, 3
Ticket Star Inc.	Japan	66.7	1
Play Holdings Limited	U.K.	100.0	1
Play European Holdings Limited	U.K.	100.0	1, 4
Vanilla Limited	U.K.	100.0	1, 4
Play Trade S.a.r.l.	Luxembourg	100.0	1, 4
Play Media S.a.r.l.	Luxembourg	100.0	1, 4
Webworks Development Limited	U.K.	100.0	1, 4
Play Limited	U.K.	100.0	1, 4
Boa Limited	U.K.	100.0	1, 4
The Web Factory Limited	U.K.	100.0	1, 4

- Notes:**
- The company became a group member during the fiscal year ended December 31, 2011.
 - LinkShare Corporation, FreeCause, Inc. and Buy.com Inc. are subsidiaries of Rakuten USA, Inc. LinkShare International, LLC is a subsidiary of LinkShare Corporation, and LinkShare Ltd. and LinkShare Hong Kong Ltd. are subsidiaries of LinkShare International, LLC. BuyServices Inc. is a subsidiary of Buy.com Inc.
 - PRICEMINISTER S.A.S. and Tradoria GmbH are subsidiaries of Rakuten Europe S.a.r.l. In addition, Voyager moins Cher S.A.S. and TMG MEDIA GROUP S.A.S. are subsidiaries of PRICEMINISTER S.A.S.
 - Play European Holdings Limited and Vanilla Limited are subsidiaries of Play Holdings Limited. Play Trade S.a.r.l., Play Media S.a.r.l., Webworks Development Limited, Play Limited, Boa Limited, The Web Factory Limited, Play Direct Limited and Play Payments Limited are subsidiaries of Play European Holdings Limited.
 - Denotes companies required to submit financial reports and securities registration statements according to Japanese securities and exchange legislation.
 - This is a special-purpose company.

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(As of December 31, 2012)

Name	Location	Ownership (%)	Note
Consolidated Subsidiaries			
Internet Services			
Rakuten Auction, Inc.	Japan	60.0	
Signature Japan Co., Ltd.	Japan	100.0	
Fine Trading Co., Ltd.	Japan	100.0	
LinkShare Corporation	U.S.A.	100.0	2
LinkShare International LLC	U.S.A.	100.0	2
LinkShare Ltd.	U.K.	100.0	2
Rakuten USA, Inc.	U.S.A.	100.0	
Keiba Mall, Inc.	Japan	100.0	
Rakuten Europe S.a.r.l.	Luxembourg	100.0	17
Taiwan Rakuten Ichiba Inc.	Taiwan	51.0	
FreeCause, Inc.	U.S.A.	100.0	2
Rakuten (Thailand) Co., Ltd.	Thailand	100.0	
TARAD Dot Com Co., Ltd.	Thailand	67.0	3
Rakuten Shigoto Shouka, Inc.	Japan	100.0	
LinkShare Hong Kong Ltd.	Hong Kong	100.0	2
LinkShare Japan K.K.	Japan	100.0	
Rakuten Logistics, Inc.	Japan	100.0	
Buy.com Inc.	U.S.A.	100.0	2
BuyServices Inc.	U.S.A.	100.0	2
PRICEMINISTER S.A.S.	France	100.0	4
Voyager moins Cher S.A.S.	France	100.0	4
TMG MEDIA GROUP S.A.S.	France	100.0	4
Target, Inc.	Japan	100.0	
Rakuten Research, Inc.	Japan	100.0	
Rakuten Shashinkan, Inc.	Japan	100.0	
RAKUTEN SHOWTIME, Inc.	Japan	100.0	
PT RAKUTEN INDONESIA	Indonesia	100.0	
PT. Rakuten-MNC	Indonesia	51.0	6
China Rakuten Network Science and Technology Co.,Ltd	China	100.0	
Rakuten Brazil Holdings LTDA.	Brazil	100.0	
RAKUTEN BRASIL INTERNET SERVICE LTDA.	Brazil	90.0	7
Rakuten Deutschland GmbH	Germany	100.0	4
Ticket Star Inc.	Japan	66.7	8
Play Holdings Limited	Jersey Island	100.0	
Play European Holdings Limited	Jersey Island	100.0	9
Vanilla Limited	Jersey Island	100.0	9
Play Trade S.a.r.l.	Luxembourg	100.0	9
Play Media S.a.r.l.	Luxembourg	100.0	9
Webworks Development Limited	Jersey Island	100.0	9
Play Limited	Jersey Island	100.0	9
Boa Limited	Jersey Island	100.0	9
The Web Factory Limited	Jersey Island	100.0	9
Play Direct Limited	Jersey Island	100.0	9
Play Payments Limited	Jersey Island	100.0	9
Rakuten Travel, Inc.	Japan	100.0	
RAKUTEN TRAVEL KOREA CO., LTD.	Korea	100.0	10
Rakuten Bus Services Inc.	Japan	100.0	10
Rakuten Travel Guam, Inc.	U.S.A.	100.0	10
RAKUTEN TRAVEL USA, INC.	U.S.A.	100.0	10
China Online Travel, Inc.	Japan	100.0	10
ET MOBILE (CHINA) CO., LTD	China	100.0	10
ET Solution (China) Co., Ltd.	China	100.0	
Beijing Happy Travel Business Service Co.,Ltd.	China	100.0	
Beijing Happy Travel International Hotel Management Co.,Ltd.	China	100.0	
Rakuten Travel Singapore Pte. Ltd.	Singapore	100.0	1, 10
Kobo Inc.	Canada	100.0	1, 17
Kobo Europe S.A.	Luxembourg	100.0	1, 13
KOBO (US) INC.	U.S.A.	100.0	1, 13
Kobo Software Ireland Limited	Ireland	100.0	1, 13
KOBO LIVROS DO BRASIL LTDA.	Brazil	100.0	1, 13
Aquafadas S.A.S.	France	100.0	1, 13

- Notes:**
- The company became a group member during the fiscal year ended December 31, 2012.
 - LinkShare Corporation, FreeCause, Inc. and Buy.com Inc. are subsidiaries of Rakuten USA, Inc. LinkShare International, LLC and Media Forum, Inc. are subsidiaries of LinkShare Corporation, and LinkShare Ltd., LinkShare Hong Kong Ltd. and LINKSHARE AUSTRALIA PTY LIMITED are subsidiaries of LinkShare International, LLC., BuyServices Inc. is a subsidiary of Buy.com Inc.
 - Trad Dot Com Co., Ltd is a subsidiary of Rakuten (Thailand) Co., Ltd.
 - PRICEMINISTER S.A.S., Rakuten Deutschland GmbH and Wuaki TV, S.L. are subsidiaries of Rakuten Europe S.a.r.l. In addition, Voyager moins Cher S.A.S. and TMG MEDIA GROUP S.A.S. are subsidiaries of PRICEMINISTER S.A.S.
 - Market brokerage & futures systems, Inc. is a subsidiary of Dot Commodity, Inc.
 - PT.Rakuten-MNC is a subsidiary of PT RAKUTEN INDONESIA.
 - RAKUTEN BRASIL INTERNET SERVICE LTDA. is a subsidiary of Rakuten Brazil Holdings LTDA.
 - Ticket Star Inc. is a subsidiary of Rakuten Baseball, Inc.
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 - This is a special-purpose company.
 - AIRIO Life Insurance Co., Ltd. changed its name to Rakuten Life Insurance Co., Ltd. on April 1, 2013.

Annexes 13 - 16

Entretiens Semi-directifs

Arjen Van de Vall / President of Rakuten Europe, Executive Officer at Rakuten Inc. - Berlin, 26 Mars 2019

Fabien Versavau / Chief Executive Officer, Rakuten France - Subsidiary of Rakuten Europe - Paris, 23 Juillet 2019

Toshihiko (Toby) Otsuka / Chief Executive Officer at Rakuten Europe & Rakuten Europe Bank - Luxembourg, 8 Août, 2019

Momoko Ando & Takayuki Asami / Employee Engagement Development | Rakuten Inc. - Tokyo, 18 Septembre 2019



Annexe 13

Arjen Van de Vall

President of Rakuten Europe, Executive Officer at Rakuten Inc.

Berlin, March 26th, 2019 – Time 1:33:04

What is your academic background and How did you arrive at that position?

My name is Arjen van de Vall. I am from Groningen, in the northern part of Holland. And my background is in engineering of human technology, which is a technical study that was founded by Phillips and the local technical college call Hanzehogeschool Groningen. And from there, it was interestingly focused on product development, and a new breed of engineers being kind of like "the spider in the web" product development but had a fascination for online. So, I started at the small agency in Amsterdam, and then roles, responsibilities evolved, work with Amazon prior to joining Rakuten. And I've now been in Rakuten for five years. I entered, being responsible for everything marketing across our e-commerce services, then quickly to go over commercial responsibility for everything e-commerce.

And for two years, I'm now president of Rakuten Europe. And what I do now is that we have a we have a whole range of services or an ecosystem of services. And my mission is to create more of an integrated offering and proposition across everything that we do. And that is both customer facing, so B2C, but also B2B facing, so we have two distinct customer sets, in everything that we do, it's always B2B and B2C. And beyond that, I focus a lot on what we call the "third party ecosystem": So, it's partnerships, alliances, investment and beyond, and it's everything that we do with data. And those are basically my scope. I wear many different hats, but that's where we are. And I'm sure that some other stuff will come up.

What is Rakuten: The story behind it and the business model?

Quick summary: So Rakuten was founded 22 years ago, in Japan, and it roughly translate to "optimism». The first business model was a marketplace, we call it "B2B2C". So, we created an online platform, where we could bring merchants-sellers online, which back then, most of them were. And then what we would do is the customer-acquisition part, so we connected sellers with buyers online. There was at the core of what we do, if you talk about the philosophy, so the concept was, and still is in everything we do is about empowerment. So initially,

empowerment was getting smaller, medium sized, or even bigger size businesses in Japan connected with the internet, creating their shops, and then ultimately supporting them in driving conversion and sales. From that first inception to let's say, the first couple of years, and focus was very much on improving all the services that are around this marketplace. So, its deck building a better platform. It's advertising, so giving opportunities to merchants to scale their business but also in which is truly unique, very active account management. So, we have in our sales organization, we call them ECC, which are "e-commerce consultants". And these e-commerce consultants have responsibility for an X number of merchants and their focuses on not just driving business results for Rakuten, but really growing together. With growth, new opportunities came up and branching out from e-commerce into other verticals or other industries. I won't talk through all of them, but where we are now in Japan is that we have 70+ services, and they range from e-commerce to banking to travel, gambling, leisure, you name it, we do it's also the point cards and checkout systems in in stores. We're launching our own mobile network in in Japan this year. So, it's incredibly broad. But at the core of it is that you as a Rakuten member, you have barrier-free access to all our services. And there's a loyalty proposition where we reward you with points, we call them super points. And these points can be earned and burn across all the services that we offer.

Virtually everything we do in Japan is big. So, either we're at we're virtually top three in pretty much everything that we do. So, we have 85% of the Japanese population is a Rakuten member. The penetration is insane if you compare the two most other markets and competitors and, the ambition is really to not necessarily grow the penetration but more on crushers: So how can we move from one service into using the second deferred and beyond. And just in terms of size, one example, there's been a lot of investment in banking or financial services. And last year, our credit cards were the biggest credit card in Japan in terms of gross volume. Certainly, it's very, very sizeable. The vision still for everything that we do is "empowerment". So regardless, if it's an end customer, we want to give them the most engaging, user-friendly and entertaining solution possible while on a b2b side, regardless if it's someone who sells and makes plum wine, or whatever, but all the way to big Hollywood studios that want to put their content on our platforms. It's all about empowerment.

How we have evolved in terms of vision? I think, at first vision was much more on getting connected with internet. And now we've shifted to innovation. So, we pride ourselves more as an "innovation company": That shows in many different initiatives, we can give some more insight about that later, but that's been the premise and the concept in Japan. It's massive, it's successful. But it hits saturation. And then I don't know exactly when, but I believe maybe eight, nine years ago, the concept was to branch out into internationalize the core of what we build,

this ecosystem, what we do in other markets. To focus there on three regions: North America, Europe and Southeast Asia. In the services that we created, most of them have been acquisition-based so in Europe.

Does the Rakuten ecosystem is the same in Europe?

So, the same ecosystem concepts are launched in Europe and we currently work on four main pillars. The first one is e-commerce and it is all "acquisition-based". In France, for example, we acquired Priceminister. In the UK, we acquired Play.com. In Germany, we acquired a smaller company Tradoria. These acquisitions, the attention was post-acquisition, to not only integrate them into our business models, but also fully integrated within our businesses. So that that's one. The second one is digital content. And the two main activities that we currently have is Rakuten Kobo, which is a Canadian company. They have the hardware e-readers and digital content area books and e-books. And we have Rakuten TV, also an acquisition Spanish-based company. And what we do there is video-on-demand: not the Netflix subscription model, but "pay as you watch". And there's a lot of evolution in those services. But that's the second pillar. Third pillar is what we call "communications". A couple of years ago, we acquired Viber, a sort of like WhatsApp, Facebook, Messenger, Skype; usually successful in a lot of countries that are more seen as third-country markets. So Western Europe? Not so much. United States? Not so much. But we're massive in Central and Eastern Europe, but also in Russia, where we are by far, the number one voice messaging, it's always the social, social platform. And now, fourth pillar is Finance. We obtained a banking license in Luxembourg two years ago, and with it, we can create both consumer-facing products or B2C products and B2B products. B2B products could be merchant loans to scale their business, B2C products could be credit cards, for example.

So, these for consumer services, this is basically what we, what we work with in Europe. Conceptually, it's the same, it's about actually creating an ecosystem where the services are integrated from a backup perspective, and where you, as a user get rewarded, do more you use these, these surfaces. The difference that we have is that in Europe, we're not necessarily aiming to have 70 different services as we have in Japan, we're looking more at partnerships and alliances to both scale our visibility or reach, or to find complimentary services that we can integrate. So, a good example is, Deezer, a French company, probably heard of them. What would be very interesting is to plug in Deezer into our ecosystem and offer that as the music solution for Rakuten members. And there's a ton of different things that we're working on. These are, by the way, not fully fixed. But that's just to give you an idea of what we do.

The journey that we've been on, especially the last five years, or since me joining has been acquiring companies is great, but what do you do with them after? And I think that stakes in the first two years are really understanding: How can we integrate these services? And how can we create relevance for our customers. And once we figured that out, we spend a lot of effort on backend integrations, so ensuring that that everything's connected, we have a single customer view, and experience. Then the most visible part is the brand. So, we are the main sponsor of FC Barcelona since last season. And with the brand, we've also rebranded our services to Rakuten, Priceminister was one of the last ones. So, insurance in Europe: now we at one brand, we still don't have one proposition, but that's what we're working on with it. So, we get more of a single understanding of what we do. What I hear a lot, three years ago, in Europe, nobody knew us. Two years ago, from two years ago, with Barcelona's sponsorship, a lot of people know us. The big chance now, is to make people understand what we do.

So, these are really the consumer-facing services. Outside of that we have quite a successful business with Rakuten Marketing: that is offering marketing technology and marketing solutions for brands, advertisers and beyond, for online (mostly online acquisition) channels and insights.

So, you talked about ecosystem based on your members. Are your members, shareholders or something else?

From a corporate perspective, what we used to do was that we either build it or bought it. So, all the services that I've mentioned so far, or products, they're all 100% Rakuten companies. The challenge has been much more in the integration piece, but they're 100% and they're all part of Rakuten Inc. And that's our business that's listed in, in Japan through all of Europe, Rakuten Inc. is listed in Japan. What we do next to that is a lot of investments. So, for example, one interesting is the Lyft's IPO, we are one of the main shareholders in. That's been an investment. But with these investments, we're very aggressively assessing how they could potentially be integrated into our ecosystem as well. And then next, there's a second group: Partnerships, Alliances, and then we're talking more about joint-ventures. And it could be based on different models, different ownership structures.

Our members are really our "end-customers". So, the relationship that we have with them is transactional. Our reward scheme is in "the points". Points cannot be money. So officially, it's not it doesn't have one, but it has a monetary value, obviously. And that's the relationship that we have. So, it's transactional. And then there's the loyalty piece that we do with points. What we are working on is to convert our points into cryptocurrency. And once we do that, it really

depends on how we operate it if we try and fix the price, or if we allow for market volatility to hit our coin offering. The relationship doesn't really change - because they don't own a part of our business - but they will be more part of our success. The more successful we are, the more our rate will go up. If the market gets hit with the volatility, it's crazy. There's the downside as well, but that's one of the things that we're considering to not just enhance the loyalty piece, but also to make them feel more part of Rakuten success. And, maybe a stronger driver for customers or members to use our services more actively.

As in many Japanese multinationals, you have principles, codes of conduct that can guide your strategy. How those principles are communicated to employees?

We have "Shugi", the values set that we have in the company and we have the "Shikumika" process. The normal process is Hypothesize, put in Practice and Validate. What Mr. Mikitani puts on top of that is "[Shikumika](#)" which means "Systemize". This one area that you were hypothesizing about, could impact the wider organization. So, can we reapply that and systemize? That's unique to Rakuten, as a Japanese company. Being allowed to make mistakes, is something that I have seen in the last five years from people being very risk-averse and non-Japanese people do not even understand them or why it will impact the social atmosphere. I think what is amazing with Mr. Mikitani is that the "culture of being allowed to make mistakes, as long as you learn from them." And then if you learn from them, you can even make another mistake, if you learn from that one as well. The end goal is to get better and better. That is different from other Japanese owned businesses: others might preach it, but they don't practice it. Mr. Mikitani not only preaches it, but he also practices and that's different. I think beyond that as a Japanese leader, what he instills in non-Japanese is also more about respect.

And that's also connected to show up our value system, which is about relationship, being open to other ideas, open to other people. Rakuten Inc. is great in the sense that its data driven, but it also takes away a lot of emotion. It is working well on employees because there is more on an individual basis. Our leader is incredibly personal, approachable. And an emotional part plays a big role in decision making not just done on raw data or facts. But there's also this "stomach feeling" on which decisions are made. From European standards, it's still hierarchical. But the cool thing is everyone can ask him questions, that are overly rehearsed. I think in Western European culture, we have a stronger sense of challenging, regardless of hierarchy.

So, you are the President of Rakuten Europe. Do you communicate with the regional presidents? Do you talk about the projects you're working on in Europe? How do they react from those projects?

The company structure is very interesting. Our CEO and Founder Mr. Mikitani, we call him "Mickey", is incredibly open. So I think in the highest level, what we have in Rakuten Inc., is a concept called "Asakai" (Japanese meaning for "morning meeting") and it's basically an "all-hands meeting" that we do that every week, first thing on Monday morning (Japan time), and in Europe, we do it on Monday morning, first thing as well (7 hours later approximatively). What Mickey does in the main meeting, and takes from Tokyo or wherever he's based, is a 15-minute talk, where he shares his perspective, not just on the day-to-day performance over business, but also very much about what we're doing beyond. Not just Rakuten, but also on our biggest market developments and how do we play into that. And this message, we don't watch it live, but every Monday, this message is distributed to all our HQs. Whether it is on global headquarters (in Tokyo) and in our European headquarters in Luxembourg, but all our offices across Europe, everyone connects to that same meeting. We watch the "Mickey's speech", we do updates from the different business units across Europe - like a rotational thing - very much not just about sharing, but also to give people a better understanding of that we are part of something bigger, and that we get educated about other opportunities we have. That's the starting point and it's incredibly open. It is way more open than you would see in any big businesses.

What we do beyond that, as executives (Rakuten Inc. has executive officers around 70 people. Most of them are Japan-based. Some are in Europe, some are in United States.) is that we have our internal tools that we communicate with daily: So, Mickey sends from super random stuff to conceptual things where we want to discuss or provide and engage on. And we have a quarterly executive camp. This is when all the executive officers, and non-executive leaders gather either in Tokyo, or United States or for the first time, this year, in India; where we have a big development hub. We share openly across regions, services and across different companies, completely facilitated by the "CEO" (often by Mickey and his team) and very much driven by the actual members and our proactive participation and engagement. Those are the two fixed layers, we have in engagement. Beyond that, our company is structured in different companies. So, we have a commerce company, we have a leisure company, we have an advertising company, across the different industries that we have. It is a vertical axis, that cuts across all the markets that we operate that specific service. Then, on a regional level, you should see it that we're at the horizontal axis. So, it's a cross section of all the services: As Regional President or CEO, we don't have a profit-and-loss accountability for the services.

What we do in one part is controlling, but also and very much facilitating business units to be successful in their markets and in their region. That could be across a whole range of services from "building data capabilities", or insights, all the way to partnerships and alliances.

My role is a bit different, because I do have profit-and-loss accountability for everything in e-commerce, and within that capacity, me and our European CEOs have a lot of engagement with our counterparts in the United States and in Asia. So, there's communication across all lines. We, on a monthly basis, do a budget meeting with all senior leadership globally from meetings with outsiders, completely transparent business updates, performance metrics across our vertical's counterparts, and where we also do the regional updates. And then, we have a monthly company meeting. So those are vertical meetings, but the concept is the same: everyone who works as a leadership position and works within this company structure joins us.

"Strong, Smart & Speed Business": this is the vision of Rakuten for the 5 years running until 2020: What does it mean concretely to the customer? the employees? local governments?

"Strong, Smart, Speed" is an internal classification we use, because we have so many different services to better understand where they sit within the wider ecosystem. So, the classification is based on market share, for example: do we have a competitive edge with the service, or it could be based on ecosystem or what role it plays within our ecosystem, and how you should see it? I think it's more to our shareholders, because the range is so incredibly broad. To give this classification for demonstration, also understand that we're bleeding, and some companies are investing in some companies, but we're recruiting on getting others. But it's part of a bigger strategy where "Strong" means significant market share, either contribution, positive or profitable. "Smart" is something that truly gives us relevant insights and understanding, not just to operate a single business, but also to operate the ecosystem. That could be more investments that we're doing in tech and innovation. And that's really part of the machine that's not just keeps us running now but ensures that we are ready for the future. "Speed": That's the area in where we see a significant opportunity to gain market share. We are willing to invest more, and we are less focused on recouping that investment in the short term.

So that's high-level classification that we have, and with that, comes also how we make our budgets. So, if we plan for next year's budget, or the next five years that we always revise, if

you are in the smart buckets, there's different expectations for you as a business to deliver on, then, when you're in strong or rain speed.

As an end-user (customers), what you will most likely recognize is that companies that have speed, where there's a very quick feature development, like innovation is launched way earlier. Concept to implementation timeline is much shorter, because if we don't capture this opportunity, our competitors will, and Viber is a very good example of that one where we have very significant reach. We also know that in Asia, you have LINE, and WhatsApp. So how do we make sure that we not just stay on par with our competitors, ahead of the curve, and especially in the markets that we dominate? So, you benefit from that. "Smart" is something that it's not necessarily a service that you as an B2C user has access to, but parts of it is what really drives our growth engine. So, there is a benefit for sure. And "Strong": those are services where we have such a large cover, that we can play a much more relevant and fundamental role in people's lives. So, if in shopping, we're the number one destination for your shopping, that means that you're in the strong group and this group is very likely to maybe evolve slower on features development, but the quality of service will be very high.

Rakuten is present in 5 European countries: UK, Spain, France, Luxembourg and Germany. We talked about the motivations that led the company to implant itself to these countries. Are all the support departments like Marketing, HR, Communication on the regional headquarters only or is there a small piece of each support department in each national office?

There's not a single answer to that one. We have a service in every European country, at least one. We've rolled our Rakuten TV across the whole European region. So, we always have Viber and Rakuten TV from this year. So even though the focused market and a bit legacy with the acquisitions, are UK, Spain, France, and Germany, we have offices in and each location like it could be a development hub, a marketing sales team, or a whole range of different things. We are not integrated and organized in such a way yet that we have functions that go across all the services. So, where we are looking at, for example in e-commerce, is within a platform. Currently, we have different platforms and different markets, how can we integrate those and create a single platform that we can centrally operate, while empowering local teams to have enough localization capabilities. It is the same with Marketing: we centralize some of our activities through Rakuten Marketing. Our marketing and technology, agency or service provider, but we also do a lot of things at a local level. So even there, there's not a lot of mother synergies, it's not really centralized, yet.

Where we have made the greatest progress, I would say, across all the services is in Business Intelligence and in Data. So, we, we've established a European, B.I team. Their servers are in all our business units, but all the business units also still have local B.I capabilities. We call it Data office where we have representatives from all the business units in Europe, and I'm the business owner of that. And then we have our European Chief Technology Officer as the Operations and Tech owner. And this is where we facilitate and create opportunities for all businesses, but we're not by no means centralized (Well, let's say yet, this is part of ongoing discussions). But the good thing is that now we take the box with rebranding, we take the box with most of the backend and integration stuff were. I would almost say we're also only now getting ready to operate things mirror more at a European level. And what you should think off is "membership": If you're a member in France, or in Germany, based on local services, the offering might be different, but the concept is the same. So, these are things that we can do smarter and more centralized. What we are doing centrally is Accounting and Controlling for all our businesses. So local teams, in local markets have their own finance and accounting, but we do control the European level. It's the same with Tax, with Legal and HR, but they all have representatives in the different teams and markets.

We talked about the demand. Do you think the demand is more local (national) or regional?

Localization now is twofold. So, the one thing is what services do we have? And in some cases, it is legacy, like acquiring a company might be active in multiple markets, maybe from a pure corporate perspective, or strategic perspective, like, what do we do this market. But so, there's a localization in there. But conceptually, the membership proposition and the loyalty scheme stays the same for an end-customer, and what the ultimate goal is - we're not there yet, but we're on the journey - that if we communicate, let's say, we put Rakuten on a Barcelona jersey, you type it into your browser, in France, you go to rakuten.fr, the experience should be very similar to me typing it in here, rakuten.de, but the service offering, the type of categories to products will be localized. So that's not just translation or anything like that, there's really a localization we have the most relevant offering for a person in a specific market.

And from this difference between the regional and local demand, is there a project from Rakuten Europe, according to each demand?

In PowerPoints, we know exactly how we want to operate it. There is a vision and that vision is that right now, we're missing out something, because there's a ton of duplication. So, we're redoing the same exercise, not just across different pillars that we have (verticals), but we're

even doing it within the verticals, because we have an operation in France, which is pretty much a duplicate from the one that we have in Germany or vice versa. This is not sustainable in the long term. So, there is a plan and I think the question is more, in the execution. So, the concept of "empowerment" can be frustrating, because decision making in Japan is very, different than decision making in Europe, or in US. And even if we directionally agree on this great vision that we have in the PowerPoints, there's still a lot of input from local business leaders and local business owners. And in part, that's also "legacy", because some of them are founders, and they're still with us after the acquisition. But it's also connected to Mickey Mikitani's concept, that is, for us European, empowerment and entrepreneurship. So, he doesn't want to create machines or robots to just execute. From a regional or from a global perspective, that brings challenges in operating and owning it. Because instead of having a single decision maker, it's more of a community or a group exercise to get from point A to B.

What we're doing in Europe, driven by our Europeans CEO, and to some extent, by me as well, we're trying to gradually break through them. So, we have a European community of leaders, and with these leaders, we agree on what the key strategic topics for the European region are for the next two or three years, securing and buying, also ensuring that they feel their business, or their scope is properly reflected, and then jointly working together on these common goals. If it's the best way to operate these things, we need, in order to compete and to accelerate at that times, make more aggressive decisions to up-hierarchy but this is also very much ingrained with the Japanese way of doing business. In order to move for to act fast, or to act on changes in markets, and at times, it's necessary for someone to really decide. I appreciate the culture of Japanese business, immensely. I truly enjoy it, but there is an element, especially in decision-making, which we as Europeans see as a tendency to compromise. I don't want to put a label on it, but I think that's more connected to a Japanese model that's more risk averse, more compromise model. And in our industry of digital and tech, sometimes you really need to make tough decisions, get rid of the noise, and just, you know, keep focused on the enterprise and the animal.

So, there's the we're on, we're on a journey. And I think as leadership group, we are very blessed with the people that we must, it's a good team. And the good thing is also that there's a common understanding that if we don't partner up, and we are much less likely to compete. Our combined strength is much greater than as an individual business, potentially an individual market. But this is an area where we need to grow and evolve in the next two years.

This also shows in our day to day operations, how Mr. Mikitani, as a president of a global company, with a decent size, is incredibly approachable. He also really hears what people are

saying, and he adjusts course, based on that: and that is where the empowerment part is true. However, for any organization, it's at times difficult to filter out the noise and to get to the relevant information. Mickey as a leader, is a fascinating and incredibly motivating leader to work with. But in our industry, at some point, you need to really act. And then at times, tough decisions need to be made. I'm not saying that we are doing a very bad job, but if you look at the industry as a whole, and if you compare it with Europe, in terms of management style, leadership style, there are things where you have a bit of a confidence: listening to everyone is great, but you do tend to end up with a compromise. That's also part of its evolution, part of its acceptance is how we work in areas we have been very successful. So, I'm not critiquing the approach, but I feel in how you operate a business when it "skills and skills and skills", you can create more noise by giving everyone a voice. I personally as a team lead, or as a manager, do the same thing. But I also make decisions before I asked people.

In terms of size, how many people are you in Rakuten Europe? Are all the support departments in the HQ? Or does support departments vary depending on the activity.

Including Viber, everything combined with women, we are around 1200 people who. Globally, we have somewhere between 17,000 people. Viber is different because headquarters are in Tel Aviv, even though it is a true global service. They have teams in Europe, for example, in London and in Bulgaria. So, there is this full European focus, for global brands like Kobo, for example, we have local representative, so everyone in Europe feels as part of being part of Rakuten Inc. first and then, Rakuten Europe. We do that with all European members. And that's one of the mechanisms that we have a weekly basis for people to feel connected with the bigger world. And beyond that, we facilitate that with management workshop, where we bring people together from completely different teams, different organizations: We try to do hackathons, lot of different things that we try and implement to ensure that people don't feel stuck within one business but that they gain visibility, and insights to grow as a professional.

What are the challenges of the local markets, you are targeting?

So right now, we are a true e-commerce marketplace, we only have operated in Germany and France, and we have different propositions in UK. Within those markets, we need to drive "skills", there and to rest of the region. It's very much connected to that. We've done a lot of work in the background, that's still not done. We don't have a single platform. There's a lot of

tech evolution that needs to happen. But that's really the main challenge that we have: "Creating significance" and therefore becoming more relevant for big advertisers, sellers, and merchants.

Why European e-commerce is not that well developed as it is in Japan?

So, the timing is interesting. I'm doing a presentation Sunday night to Mickey, about our next congress, and our plan for Europe 2028 (evolution in 10 years), and what should be our ambition level. I mean, the ambition is there, but if we claim to be #3 in Germany, that means that you need to do it at a certain scale. If you want to say, "I am #3 in every European markets", well then, exponentially, it grows, and the complexity grows as well. So, for me, the focus is to create a platform that can be easily scalable, so it's not location dependent, we don't need different instances, for each of the markets that we operate, we can build a single platform from scratch, where we can easily roll out to any European markets. This will take 2 - 3 years, that's, at least, the first assessment that we have.

Now we're trying to secure the budgets to develop this assessment. And then beyond that, there's a lot of services and functionalities that we can plug into that. So it's about supply chain management, real logistics fulfillment, finance or a whole range of different services that we can plug in, to ensure that merchants through a single platform, have access to customers across the whole of Europe, and servicing them with different business models. So, it is not just marketplace, it could potentially also be advertising and beyond. So, the concept is a single platform that is very flexible and connected directly to merchant needs. Plus, obviously, connecting the merchants to local customers demand. That's the high level of mission that we have, and what we're trying to secure investment and sign off for.

If we secure it (hopefully soon) then we will not be operating our existing businesses so far. But gradually, we will put people more and more into this centralized approach. It could be "tech-ed", EU teams jointly which are working from multiple locations that we have on building this platform, and obviously starting to think about future organizations like "what kind of teams do we need to have in markets? Is it only sales and marketing or more?"

These are all things that we're working through. But for us to be successful, that's what we need to, we need to start with. So, it's less about organization, it's less about the corporate side of things, it's much more about solution: What is it that merchants want, what is it the customers want and how can we bridge that and build relevance.

What makes you different from the other competitors doing e-commerce, like Amazon, for instance?

I mean, it's a tough one. But for me, it's interesting, because I worked at Amazon for a couple of years that I've had both perspectives. And I worked in Amazon in Luxembourg, which is the European headquarters. Where Amazon is incredibly strong is in focus. At the business level, services have evolved over time, but if they do something, they don't have assets. Either it being "Fulfillment by Amazon" like the logistics network, yet they're building or Amazon Web Services, if they do it, they go all in and they're willing to take big but calculated risk. If it doesn't work, like with the developing their own mobile phone, for example, they're also willing to pull the plug, which if you notice with them, and that makes it quite unique, they do it much sooner than a Google, for example.

Where we differentiate is really in the "empowerment" part. Amazon is really is a machine. So, you as a B2B partner, you don't really get a face until you hit X. And you will be squeezed for every single, whatever point of percentage, to maximize their revenues. And that's the overall feedback that you get from partners working with Amazon. They do amazing volumes, scale is incredible, but they squeeze you wherever and whenever they can. They're incredibly successful and have every right to do so. Our approach is different, where we truly embrace this empowerment concept, but we also work together on a bigger goal. So, if we talk more about partnerships, alliances, that are on somewhat equal footing, like there's a win for us as a win for you, and this is how to get to where we're going to achieve that. And that's really that is a big differentiator. I recognize that in discussions either with a German merchant all the way to a European airline looking for a partner, that there's a fundamental difference there.

And beyond that, there's a lot of local players in Europe and that's the "legacy" thing: They have skill in one market, a lot of them have thriving, a lot of markets can never reach relevance, and they will, ultimately be pushed out. Either their bots are digested, eaten up, and it is fine. If it's not in 5 years, it will be in 10 years. It's very difficult for these guys to remain relevant. So, our mission is be with the three or four that survive. What is very interesting in terms of evolution is, especially in China, if you look at Wish. Wish, completely new concepts, they pump insane amounts of money to scale their concepts. But their concept is incredibly simple: It's a single platform, and depending on your location, you get access to all these Chinese-made goods, incredibly low-price points, and you need to accept the long delivery (like three weeks or whatever, you only pay low costs for shipping). This is not directly competitive to us, in a sense, if you look at the product line up, but if you look at how they penetrate, it's how the world works in two or three years. So, there's an interesting element in there, where they and

AliExpress (with a slightly different approach but conceptually the same) create size to gain market share. Once you have it, you have some sort of cash to do it. I don't know what their evolution will be, but if they're smart, they can evolve it into something that goes beyond what they're doing now. From a global development perspective, this is for me, a very interesting case to see how you can build a brand in such a short time frame, huge loyal following, and how did they now convert that into the next stage.

Local competitors, I think, even though our offering and our size is not on par with them right now, I feel that there's a lot of emotion and loyalty from for people locally. But when someone comes with a better price, better service, then over time, you will be squeezed out. Those are just the dynamics now, I love a lot of brands, but do I shop at them or do I go for discounts? Well, I like to shop and hunt for deals. We need to learn from our local players where and when possible, we partner with them. So that's also a huge difference. But in the long term, I think that we can be sustainable if we elevate it to regional or global level. That's economies of scale and relevance for brands manufacturers, for local players, that will be a bigger and bigger challenge. Google says: "Amazon is our biggest competitor" because Amazon is the "start of the journey" if you look for products. And for us, it is Google. We have a high dependency on Google for acquisition traffic: we invest in Google Shopping and search in SEO. It's also going to be very interesting to see how they will evolve more into a checkout shopping platform. So, they've done things in the United States, never really at scale outside.

But our differentiation is very much about empowerment partnership model, and jointly building a future as a true partnership. For end users, the difference is that the range of services that we offer is not necessarily what you have from a local player. So, we can combine content with e-commerce, potentially with travel, banking and beyond. As a result, we can offer a better experience or friendly-user experience, lower barrier, single account, all that stuff. There's not a lot of players who would do that: As we do it in Japan, there's no one else. As we do in Europe, Amazon would be the one that touches all these parts as well. And it does give us an edge.

Japanese e-commerce vs European e-commerce: When it comes to digitalization, what recommendations will you follow up to your superior, if you succeed on implementing that innovation in Europe?

It's very good question. I've never lived in Japan, but I am there a couple of times a year and they have something in what I'm absolutely blown away. As far as innovation goes, it is very different. And as far as our services go, I would say that we have been very successful in

digitalization: Online shopping, then booking your trips online, and now it is banking online. We don't invest a lot in physical touch points, there was no branch offices that might be pick-up points. Within our services, we've been successful, what we're doing now is more connected, the integration of being able to have your card and to collect to earn and burn the super points or points across multiple outlets. Those points can be used in vending machines, it could be a whole range of different things. So, it does, this takes more time to convert people to get people in there. I do feel that we're making good progress, especially with our credit cards, where we can connect offline with online (rewarding offline shopping with points that are online benefits.)

But there's a step that goes far beyond that, more like a digital ID, provided from the government. There's one example in Europe (Eastern Central region) where literally everything you do is digital. We do the same in Holland. With your digital ID, you can manage your tax returns, move to different district, but manage your electricity bills and beyond. But it is not the case in Japan, because everything is in paper, very bureaucratic; Anyway, there's no industry standard. In a way, maybe our mission would be to set the industry standard, meaning that our solution will be adopted the most. You can find it in payment terminals, for example, in shops, where you can now pay with on terminals owned by Rakuten. So, we are facilitating it. But I think the bigger issue is also where the responsibility answer and where the opportunity begins. And within reason I do feel that Mr. Mikitani and we are doing what we can in Japan for digitalization. Beyond that, I think he is, on a personal basis, is doing a lot to work on innovations in government and it could be from how businesses are operated. We are the first global Japanese business that introduces English is the main language is a big step and founding the new economy, somewhat like moving away from the old industrial are doing.

What is interesting in Japan is the difference between generations: Kids and teens, early 20s dudes are 100% Digital. Everything is completely digitized but their parents are still quite traditional. The revolution that we had in Europe, shows that it's the same in Germany: everything is paper, whether you go to an office or you try to get stuff done. It's slow, it's frustrating, it's cumbersome. I talked to the young people, they are annoyed with it, they want change, but they must deal with it. Inside the infrastructure of Rakuten, our audit companies could play obviously an incredible role but there needs to be a firewall if we are talking from a technology perspective, and we, European, could probably facilitate.

Less on the competition, more on the actors around the market. Are you in touch with other market players such as local government, institution, or any other actors? In Europe, we have the recent European Union General Data Protection Regulation

(EUGDPR) implemented by the Commission? What can be the impacts of such policies on Rakuten's ecosystem?

Obviously, this has a massive impact on what we do. A GDPR is one, that it's usually impactful for any business that operates in Europe. How we get organized in those things is that we have a regional focus but a very much local execution. So European sites create the framework, which support from local members and from our global teams. And then, we need to drive and implement that. EUGDPR is not something that has an end date. So, it's ongoing. So, we create structures that facilitate that. And beyond that, our preference is to have a seat at the table, at European level. So, there's a couple of developments that could be hugely impactful. And one of them is the digital text that's currently being discussed. Right now, it doesn't look like it will be implemented as a European guide, but I believe it's only already has it or will do it. So, there is evolution there. And I think, in a way, it's what we're seeing is that the brick and mortar stores, the traditional retailers are being hit incredibly hard. And based on tax loopholes or text optimization that global companies do, they have an unfair advantage versus local players.

I do agree that we need to create an environment where it's a leveled plain field, not just an offline versus online. But it's also an Amazon versus Rakuten or Google versus whomever, we need a leveled plain field. But as we've seen that with the "cookie laws / first privacy laws" that were put in place, the concept was to protect end-users, the solution is terrible. It's just frustrating that you need to click through all this stuff every day. GDPR has only further complicated what used to be an "Accept? Yes or No" question. And then if you want, you can read the privacy policy, right. What GDPR has done is that a lot of businesses or publishers or advertisers broke it up into four or five different options. So, you need to scan through a full list to just do it. And by default, a lot of people will hit accept, because that's an easy thing to do. So, it's kind of neglects what it was intended to do.

Privacy and security are massive issues, and they will only get worse over time. The question is "Do local or regional European governments, actually have the skills and expertise to come up with relevant solutions?". And that's the part that I doubt if I look at the execution of GDPR. So, it's a huge pain in which we comply to it because we must. But I believe there's much more user-friendly solutions that we can offer. What it has pushed us to do, and we're not done yet, is to harmonize our privacy policies across all our services. This has really been an extra push to think about the framework that we have for all these different services, customers in all these different markets, if we can create something where we actually get their consent to do all of these things, and obviously, within the regulations that we have, but also to make it more user-

friendly. This is a journey. And once we have that implemented, it also includes like cross company agreements that can have access to the data.

The assumption is, once we have it, we're set at least for the next short term, but what we would like to have, not just Rakuten Inc., but I think businesses within the space in general, is have a seat at the table. We have a seat at the table, but that something's done with the inputs given and I don't feel that it has been properly reflected. The most and the main thing to me is that, ultimately, I'm an "end user" as well, and my user experience has not improved since EUGDPR has been implemented: my number of spam emails has not been reduced, the number of "spam goals" where people pretend to be Mr. Mikitani or whomever is only getting worse; I changed my password now more regularly than ever before. There is a cross section where business side, governments and regulatory agencies meet and say "Okay, this is what we need to do. How can you guys support us on doing so?"

You have probably heard about the Economic Partnership Agreement in the European Union and Japan. There's a lot of stuffs going in this. A lot of lobbies are working in this, intermediate associations: JETRO, National chambers of Commerce, European Commission. They help companies to understand what governments wants them to do, and in the same times, explain to governments what companies' expectations on that are. Is there a challenge for Rakuten Europe?

There's always a risk. For instance, at Holland, we have a king. And when he does state visits, our king is a "business king" so when he travels, there's a lot of Dutch businesses that follow him, essentially the big ones. I think it's great for a country to have a representative. But how do you make decisions if you have two companies producing selling the same thing? I think for Japan as well; government cannot be biased. The interesting thing with Rakuten and Japan is that Mr. Mikitani has good relationship with the Prime Minister Shinzo Abe. Mikitani also founded the new economy forum, and he has an ear with Prime Minister. So, I feel that what he is doing very good, but not for the greater good of Rakuten, but for the greater good of Japan. He is not the only one, there's more business people that are connected. If you look at Trump, regardless if you agree or disagree with his agenda, at least he has councils where there's attended representants of companies, like Tim Cook from Apple, for instance. They could do so much more, but at least there is a format, there's a table where they discuss things. If you look at a European level, I question if we even have that structure, or that thinking. It's not always the best and the brightest, but at least, we can question "what are the biggest brands, manufacturers and service providers? What does what do the market look like? What is the demand side? What could we be doing? What is the rest of the world during? How can

we catch up like those kinds of things?". It's not happening enough. From my point of view, what I do see as a positive is that European Union is becoming more and more commercially focused and the EU-Japan FTA is a good example, and probably needs to accelerate or move in a different direction.

The biggest challenge is really in all the regulatory stuff and all the rules and regulations and how can we get access there? We are involved in green lobbying, not as you see it in the United States, but there is a lobby for different things. For example, for marketplaces and digital content, we have people in Brussels, who actively manage those kinds of rules and it's not just changing regulations. We try to be ahead of what might happen next. If we're going dry, it's maybe we should go a little bit more center, because then this is what you want to achieve. But as a Japanese company, we are also a bit worried about the implications that might have, because it's not how things are done in Japan. Reputational damage, if you do it too aggressively in Japan will be seen very different as Uber in the United States. If we're not allowed to, someone will tell us, and I think the Japanese way is more "let's first figure out what we're allowed to do. And then when we know, can we change this to ensure that".

At an individual or at a country level, the definition of privacy is very different in Germany than it is in France. So, in Germany, there's a very big group of people that still don't trust online payments. So, there's a massive group that pays on invoice, or that gets an invoice goes to a store, pays it in store, and then the product gets shipped. If you compare with the United States, the level of trust is the complete opposite. And navigating this in Europe and coming up with common ground is difficult, because it might be saying to the most strict countries, that they have to be a little bit too strict, and then to the countries that are very useful, then they will need to be a lot stricter. It's an incredibly fascinating game, but I think Europe as a whole, is impacted because of all these different voices from the members

Annexe 14

Fabien Versavau

Chief Executive Officer, Rakuten France

Subsidiary of Rakuten Europe

Paris, 23 Juillet 2019 – Temps 21:00

LCR

Pouvez-vous vous présenter et nous expliquer comment vous êtes arrivé à Rakuten France?

FV

J'ai toujours été dans le digital et dans l'e-commerce. J'ai rejoint Rakuten il y a un peu plus de trois ans maintenant et demi pour finalement installer la plateforme et le modèle Rakuten en France. J'ai ainsi assuré la transition d'acquisition pour passer de ce modèle où on avait différentes entreprises, vers une acquisition de toutes ces sociétés.

J'ai un profil de plus de 20 ans d'expérience dans le digital et dans l'e-commerce. J'ai fait une école de commerce et j'ai après, occupé différentes responsabilités en développement marketing ou développement commercial dans différentes entreprises ou différents groupes. Mais je n'avais pas forcément de connaissance des entreprises japonaises, ni de la culture japonaise que j'ai découverte finalement par hasard ou sur le tard en rejoignant Rakuten en France et en découvrant le projet de Rakuten dans le monde; son positionnement tout à fait unique et singulier, le modèle de l'écosystème, le modèle de la fidélisation de Rakuten, le modèle de Rakuten en tant que plateforme (marketplace) qui se positionne comme un intermédiaire entre les organisations "Pure Player". Je ne connaissais pas tous ces éléments là avant de rejoindre Rakuten car à l'époque le groupe Rakuten avait une notoriété en Europe qui était assez limitée.

LCR

Existe-t-il une différence perçue depuis la phase d'acquisition par Rakuten Inc. en France?

FV

Il y a eu un changement important qui est de passer d'un modèle de place de marché, tel que PriceMinister qui était essentiellement un site de e-commerce qui faisait de la vente de produits d'occasion de particulier à particulier vers Rakuten , qui est plutôt une place de marché qui aide les vendeurs professionnels ou les grandes enseignes tout comme les petits vendeurs qui vont avoir une micro-entreprise. La plateforme a vocation à couvrir toutes les familles de vendeurs et donc ça a été une intégration progressive dans un groupe japonais avec des nouveaux process, des nouveaux KPI (Key Performance Indicator), des nouveaux outils mais aussi un changement de modèle qui était passé du monde de l'occasion au monde du B2B2C: Des vendeurs professionnels.

LCR

Quelle est la marge de manœuvre de direction de Rakuten France dans le groupe Rakuten Inc.?

FV

Rakuten c'est un modèle qui est fortement décentralisé. Donc nous sommes dans une approche où l'écosystème Rakuten a des éléments communs partout dans le monde notamment la marque et le « membership program » avec les Rakuten Super Point. Mais selon le pays, selon la région, on va avoir des services différents un petit peu plus du e-commerce par exemple en France; un peu plus de sujets liés au streaming vidéo en Espagne; et on a des activités qui sont différentes selon les pays mais avec un niveau d'autonomie local très élevé et avec des relations assez flexibles et agiles, avec peu de niveaux hiérarchiques, peu de contrôle finalement entre les filiales et le corporate.

LCR

Comment, dans ce processus de direction décentralisé, se place Rakuten France dans la vision corporate de Rakuten Inc.?

FV

On est toujours indépendant. On a un business plan au niveau local, on va réfléchir à quel type de service on va lancer; et comment on fait évoluer notre proposition de valeur, notre positionnement sur le marché. Mais on a beaucoup d'autonomie dans le fait de développer la notoriété de marque Rakuten. On a un cadre avec des objectifs financiers budgétaires. Et dans ce cadre-là on peut soit réaliser des actions au niveau local, soit réaliser des actions participer à des projets qui peuvent être au niveau de la région ou au niveau international.

LCR

Quel est l'impact de la demande locale de Rakuten France par rapport à la demande régionale?

FV

En fait, je ne peux pas vous donner de chiffres parce que nous sommes une société cotée, on ne communique pas les chiffres par pays ou par région. Mais je peux vous dire c'est que la France est le plus gros marché de Rakuten en Europe. C'est là où le volume d'affaires et les revenus de Rakuten sont les plus conséquents. C'est le premier pays en Europe. Donc ça c'est la réponse à votre question. La France est le plus gros marché de Rakuten en Europe. Dans le monde, nous avons des concurrents. Les données montrent qu'Amazon est une société qui est cotée, donc les données sont publiques. Rakuten est une société cotée, donc les données sont aussi publiques. Vous pouvez comparer les tailles des deux entreprises. Vous avez dans le monde à peu près 5 sociétés qui sont parmi les plus grosses plateformes e-commerce: Alibaba (Chine) Amazon (USA), Tencent Holdings qui est un groupe chinois qui a différents actifs dans le e-commerce, Rakuten (Japon) et eBay (USA).

LCR

Quels sont les défis que vous avez pour placer Rakuten France au top de la demande locale en e-commerce?

FV

Notre défi au niveau local évidemment est de faire progresser la part de marché de la France dans un contexte concurrentiel qui est hyper-compliqué et hyper-tendu. Le e-commerce est un secteur d'activité avec un niveau d'intensité concurrentiel qui est parmi les plus forts et la France est un des pays où l'intensité concurrentielle est parmi les plus fortes dans le monde dans le domaine du e-commerce. Et notre objectif, celui qu'on réussit à faire, est de développer notre part de marché, de recruter plus de clients, de fidéliser et d'augmenter le taux de fidélisation de nos clients et de faire en sorte que Rakuten continue de progresser et soit installé durablement dans le Top 5 ou Top 8 des plus gros sites ou acteurs de l'e-commerce en France.

LCR

Surtout qu'en ce moment, il y'a une grosse implication de l'état en ce qui concerne le règlement général sur la protection des données (RGPD), qui est même un enjeu régional. Est-ce-que vous traitez avec l'état ou des institutions d'ordre étatiques sur la question?

FV

Oui bien sûr. Nous on est une société de droit en français et donc là, on est très actif et on a été très actif dans la mise en place de tous les processus de contrôle de compliance et de sécurité liées à la RGPD en interaction avec toutes les équipes. Et aujourd'hui au niveau global, Rakuten a une évaluation mise en place par un organisme indépendant qui fait des évaluations de conformité RGPP et on a obtenu un très bon score. Donc nous sommes absolument concernés et tout à fait complaisants. Le programme de mise en conformité RGPD est piloté par des équipes qui sont au Japon avec des représentants sur chaque continent ou dans chaque pays dans lequel Rakuten est implanté.

LCR

Quelles sont vos tâches quotidiennes en tant que CEO de Rakuten France?

FV

Ah, c'est compliqué de faire une journée-type. Moi mon job c'est d'avoir la responsabilité complète du P&L (Profit and Loss) de l'entreprise. J'essaie de faire en sorte que l'entreprise se fixe des objectifs de croissance, d'amélioration du chiffre d'affaires, de marge de rentabilité, de développement des équipes et donc, de développer Rakuten France dans toutes les dimensions. Et puis ensuite, au quotidien, j'essaie de faire en sorte que les équipes aient ces possibilités, qu'elles soient correctement organisées et animées pour pouvoir atteindre cet objectif et de gérer la relation avec les autres équipes européennes où évidemment les équipes internationales, et expliqué les performances de l'entreprise et mettre en place des plans. On a une gestion des ressources humaines et des équipes qui est au niveau local. Ce qui est sympa vu que Rakuten est un groupe international. On a aussi beaucoup de personnel en mobilité interne et c'est un environnement très international avec beaucoup de nationalités (une quinzaine de nationalités qui sont présentes chez Rakuten France).

Notre langue de travail par défaut est l'anglais et il y a dans les équipes que nous avons ici beaucoup de nationalités et tout le monde ne parle pas français. Et quand on a un travail en commun à faire, quand on fait des documents qui sont des documents qui sont à destination des équipes internationales, on est majoritairement dans un travail en anglais.

Annexe 15

Toshihiko (Toby) Otsuka

Chief Executive Officer at Rakuten Europe & Rakuten Europe Bank

Luxembourg, August 8th, 2019 – Time 0:42:00

What is your academic background and How did you arrive at that position?

First, well, basically, my carrier is mostly based in Banking. So, after I graduated from the University of Tokyo, majoring in psychology, I start working for, Mizuho one of the three biggest Japanese bank, I was there for 13 years, in and out of Japan. During the time, I had a scholarship for an MBA, so I went to The Wharton School, University of Pennsylvania, to get a master's degree in finance. And right after that, I moved to Hong Kong to oversee the Investment Banking in Asian countries. I graduated in Wharton in 1997. And then right after that, I went to Hong Kong in 2000. Then I had the opportunity to join a Fintech startup, DBK Asia, which was one of the earliest online banks not only in Japan, but also in the world. At that moment in time, it just after about maybe five or six years, the Internet spread out.

So, I joined this sort of new journey. I went back to Japan, quit my job, and then join what's called an e-bank particularly focused on the payment, because of the revolution of Internet. The business structure of online banking is no longer the lending business model, but the payment business model makes a lot of sense. So that was the idea. It was pretty much like PayPal. And the bank was successful in the sense that, we acquire millions of customers in Japan, we became the largest online bank, even though, we didn't have any sort of big sponsors. The other, you know, a couple of older events, you know, in Japan, that started almost the same time was for the bank, you know, obviously, backed by Sony. And, the other one is kind of a subsidiary of Suitomo Bank. So, we were the only independent bank. There I was Executive Officer, managing the technical office, in charge of finance, planning, and other stuffs. So, I covered a lot of areas.

And then, I skipped many stories in the meantime, but in 2008, we were limited by the lower banking prices, and then, we decided that we need a big sponsor. That's why we started the big actors, including Rakuten Inc. At the end of the day, we were acquired by Rakuten. That was the beginning of my carrier. And for some reasons, I continue to Rakuten rather than being kicked out. I was with the Rakuten Bank for three years, and then Hiroshi Mikitani asked me

to move up to the parent company, Rakuten Inc. I said "Yes", I became Head of Finance, directly reporting to CFO, until 2012. And then I had another request from Mr. Mikitani, that, wanted to go to Europe. So, I said "Yes".

I came here. And then I took on several roles, including Chief Financial Officer of a company called Rakuten Viber, which is an Israelite messaging company. I was one of the staff members of Rakuten Bank, started in Luxembourg. It is a new fully licensed bank in Europe we created, and we started our business in 2017. I was even part of the team for the preparation of the license. And then, almost two years ago, I cover the whole field of Rakuten Europe, as the Chief Operating Officer / Chief Executive Officer to basically manage the entire European operations, and being responsible for strategies, planning, implementation.

As Rakuten Europe HQ Director & Bank CEO, how does it differentiate from Arjen Van de Vall, who is labeled as President of Rakuten Europe?

Good question, basically the CEO is the highest position in hierarchy. But I work hand in hand with Arjen for European initiatives as well. Right now, he's more focusing on areas like e-commerce, because of his background, and coming from Amazon also. But at the same time, we very closely work together, to sort of create a regional ecosystem.

Could you tell me more about Rakuten ecosystem and how FinTech system came into this ecosystem?

Rakuten evolved. Rakuten started 22 years ago, as an e-commerce company but suddenly after IPO, we started to wide our business portfolio. Right now, we called ourselves a "membership company". In Japan, we have one almost 100 million Rakuten IDs out of 130 million for the populations, So the penetration is high. We are basically a, very dominant player in the membership business. When you talk about memberships, you know, the program membership program, should we touch on every corner of the life of a customer. We need to have multiple customer touchpoints. It's not the only e-commerce, but also other things. That's the basic idea behind and, we started to extend our business not only to the adjacent area, from e-commerce, but we also were boldly entering new areas like payments, banking, security, trading, insurance and so forth. Because we know that those are also a big part of everybody's life. So that's the fundamental reason behind.

And then the idea of our ecosystem is to increase across usage between different services. First, you know, we rebrand almost every business acquired as Rakuten in Japan and in the world, so that people can understand our services. Second, we have a unified loyalty program

called Rakuten Super Points. In Japan, if you buy something in Rakuten Ichiba which is our e-commerce marketplace, with a Rakuten card, then you get up to 5% of the super points of your payment, which can be accumulated and then redeem the way you want in our services - book a flight with Rakuten Travel, pay a commission to Rakuten Bank, or buy a ticket for Rakuten Eagles, our professional baseball team and so on. That loyalty program - Rakuten Super Point - is acting as a currency, although it's not technically currency.

We expand our relative program to other non-Rakuten merchants, which are two million outlets. Members can "burn" their "Super Points", including drugstores, convenience stores, restaurants, franchises, almost everywhere in Japan. Rakuten Super Point is regarded as the number one popular and biggest loyalty program in Japan. That's kind of sharing our ecosystem growth tremendously, which is a success case in Japan. The idea in Europe is basically to recreate our successes from Japan, although, our competitive environment here is very different. We don't have all services from our ecosystem like in Japan, and competitive position is very different. So, we need to tweak our strategy in order to make it happen: Those are the challenges. And, in terms of the branding. Rakuten was already know, pretty much across Japan, even 15 years ago, but until recently, in Europe, not many people knew. That's one of the reason why we started to sponsor, FC Barcelona in Europe, Golden State Warriors in USA, The Spartan Race and Davis Cup and all the major worldwide events, in order for us to be visible to the audience, B to C audience as well as B to B audience.

Okay, so, based from your experience, as a former banker, from your online banks, how does Rakuten Bank work: regular bank or investment bank?

Aiming for commercial bank, there was a small element of our investment activities. Rakuten Bank Japan and Rakuten Bank Europe have maybe slightly different strategies. Obviously Rakuten Bank Japan, as I understand has a pretty well-balanced portfolio between payment, transactional business and assets. That was one of the reasons it has been so successful after being acquired by Rakuten, generating around \$250 million EBITDA every year; hence one of the most relevant activities in Rakuten Group. My philosophy in Rakuten Bank is also, "balancing out transactional business and asset business" to make them equal.

Rakuten is present in 5 European countries: does Rakuten Bank can operate in the five countries. How does it operate in each part of Rakuten ecosystem? What is the local challenge of the market you are targeting?

It's not only five countries in Europe. Our messaging app, Rakuten Viber covers literally every single European nation; Rakuten TV, a video streaming business, based in Barcelona have launched their services in every single European country. That's rather recent, like a couple of months ago, but we are everywhere. Rakuten Kobo, the e-book business might be headquartered in Toronto, Canada, but have a big penetration in European countries. We are in more than 10 countries including France, UK, Italy, Netherlands, where we are bigger than Amazon. Most of the major countries in Europe hold our footprints. And again, the degree of the ecosystem varies from one country to the other. We have more than 10 businesses in Europe. In Japan, we have approximately 80. In terms of scope over business, we still have a limited scope in Europe. One of the challenges, as a group, I would say is to expand that scope. On a second challenge, in Japan, we started at Rakuten Ichiba, our flagship business. So, it evolves so fast. A lot of customer we acquired had started with Rakuten Ichiba. And then, we brought those customers to other services, like, Rakuten Card, a credit card company that started in 2006. And then, within 12 years, we became the largest credit card company in Japan, which is simply amazing. We have right now 70 million credit cards customers in Japan, and it's growing too well.

So, we acquire one million customers within five years. We lead a lot of customers from Rakuten Ichiba. So, what I'm trying to say is that, in Japan, we have a flagship business growing up to critical mass. And then, we lead them to the next generation; bringing a lot of customers at Rakuten Card, Bank, Securities etc. In Europe, so far, we don't have that big magnitude over business. For example, Rakuten France, France is one of the leading e-commerce platforms in France, but still not that big as compared to regular e-commerce in Japan. So, another challenge is to have that kind of core business, where we can bring a lot of customers to be a cohesive ecosystem structure. So those are the major challenges I have, and that has a lot of things to do with Rakuten Bank business as well. I cannot tell too much about it, but we are thinking about several ways to tackle these challenges.

As Rakuten Bank Europe, do you financially support the other European subsidiaries?

No, in order to financially support businesses in Europe, if needed, then we seek more capital assumptions or other financial arrangements with the headquarters. So, we present to the headquarters, and then they approve, then they dispatch money to any of the European business, as it should be as rational as possible.

Do you communicate with your colleagues at your level? Do you have joint projects?

Yeah, that's my that's my daily job. Every meeting, I'm talking with CEOs or COOs of regional business and trying to create synergy, joint efforts and everything.

When it comes to size, and staff of Rakuten Bank. How many people are in Rakuten Bank in Japan? And how many in Europe?

For Japan, I don't know. I'm away for almost seven years. So, I don't have a precise number but obviously, more than 500 people. And in Europe, Rakuten Bank Europe has, 45 people. It's a pretty compact.

In 2011, CEO and Founder of Rakuten Inc, M. Mikitani, decided that the global company will operate in English, from official meetings to internal emails: How does it work so far for Rakuten Bank?

Professor Tsedal Neeley from Harvard Business School. She wrote a very good book about Englishnization. Last year in English, at least Japanese and some other languages? I hope. I think you can get it in bookstores. That book describes a lot of things, which I totally agree. In industrial, it was a huge success, in the sense that we started to engage a lot of talent from all across the world, rather than from Japan, and particularly when it comes to engineers, scientists, the amount of Japanese technicians is rather slow, it's very important to hire global talent. But most of the Japanese companies use Japanese as a communication language, but it creates huge barriers between Japanese and non-Japanese employees, which sometimes, discourage other people.

The way we did in Rakuten is the opposite, we started to change our communication language from Japanese to English, even though they're only Japanese people in Rakuten. People were sort of "forced" to speak in English; and it sounded very ridiculous, at the beginning. Not many people can speak English fluently. So, it was sudden, without drama of course. And then, we had a quota that, encourage us to do English proficiency in a two-years period, then if you are not complying with the program, either you can be demoted, or your salary will decrease by 10%. So, this was a really serious effort. Initially, a lot of people thought, that they could not do it. But surprisingly, most of the people made it, after two years. They made a lot of effort in learning English, in and out of the company, the company funded training program, etc. But at the same time, senior employees never wanted to speak in English, but they made it. It was really moving in some cases, and then, two years later, the communication layer, started to pick up dramatically. We started to hire global talents. Right now, I think nearly 60% of our

engineers and scientists working in our headquarters in Japan are non-Japanese. Something that cannot be seen any other Japanese companies.

As in many Japanese multinationals, you have principles of "Rakuten Shugi", you have codes of conduct that can guide your strategy: How do those principles are applied in your daily operation?

We are making big efforts to do that in Japan and outside of Japan. For example, we have what's called the CWO (Chief Well-Being Officer). His basic mission is to evangelize our Rakuten Shugi. He's co-founder of the company, so he knows everything from the history of Rakuten. And now, he's kind of an advocate for Rakuten Shugi, he came to Europe for extensive period. He visited our office for three days, talk to every single people, explain the background of our principles. And, we did exercises in order to understand what a gap between Rakuten Shugi is and our native culture (Japanese). And surprisingly, there are many commonalities between them Then people start to understand exactly what it means, and then we have implemented small things to remind everyone what it is in our everyday routines.

We have a very good practice called "Asakai" it is a morning meeting in Japan. And every Monday morning, we have Asakai where we can connect globally and where we have one-hour "get-together". Our CEO will make a speech for like, five-ten minutes, where he repeatedly talks about Rakuten Shugi, about its importance as a reference, how it can be interpreted, and how it can be applied.

What is your role within the two entities?

My focus is building the ecosystem of Rakuten. We may have a slightly different approach from Japan, essentially in e-commerce.

What are the differences between Japanese and European ecommerce?

In Japan, the size of our business and our competitive position is higher because we started earlier than Amazon, and now we are running ahead. In some European countries like Germany, as you may know, Amazon is a superstar, so we are much, much smaller than Amazon. In France, Amazon is not that big but is still a threat, plus there are many e-commerce platforms, so it is very crowded.

Are you in touch with other local actors, like government, association of commerce, or the institutions like embassies, etc.?

So far, in France, absolutely. One of the founders of Rakuten France is relatively associated with the Industry Association. So, we get a lot of information about the recent development regulations, at local country level. And, of course, we have activities associated with our European Commission. We are always in contact with people from European Commissions in our area, including protection in e-commerce (privacy, security, conversations in France, potential deterioration from the United States) and all political agenda. We are closely monitoring them for us to be protected as much as possible. Because those matters are important part of our activity.

You have probably heard about the Economic Partnership Agreement in the European Union and Japan: What are your opinions and concerns about that?

Rather than Rakuten Bank, it is more on the e-commerce. More and more Japanese products can be imported to Europe and vice-versa. That's what we call "Cross Border Trading" or CBT. We are templating our new initiative to ensure trade between Europe and Japan.

Annexe 16

Momoko Ando & Takayuki Asami

Employee Engagement Development | Rakuten Inc.

Tokyo, September 18th, 2019 – Time 1:00:35

What is your academic background and How did you arrive at that position?

Takayuki Asami (TA): I'm Takayuki Asami, nice to meet you. I started to work in Tecmo Koei, which is a game software company in 1995. So, I worked there for five years. After that, I got strongly interested in the internet industry. So, I joined Rakuten in 2000, it means I have been working here for almost 20 years. When I joined Rakuten, and I started to work as a web designer. After that, I became a service producer to develop a new service. And I moved to Human Resources in 2010. So recently, we started a new department called Employee Engagement Department (EED), which is our current department in order to promote original Rakuten mindset and philosophy, called Rakuten Shugi into all of our employees, not only in Japan, but also all over our regional leaders, including the United States, Europe, and Asia. We have maybe over 20 subsidiaries all over the world. So, when we started our department, we tried to hold a lot of workshops, to implement our philosophy for our Japanese employees, first in Japan. And after that, we started to build a network of our corporate culture, especially for Human Resources people, in each region. So currently, we have built the network in Japan, with each region, and so we hold several conferences in each region to show what it means. Momoko has just been to Europe, this year.

Momoko Ando (MA): Yes, I visited Paris and stayed with Fabien from Rakuten France for two weeks. Very nice to meet you. I'm Momoko and I joined Rakuten last December. So just nine months past, and before joining Rakuten, I was working in a Japanese automotive component manufacturer. Toyota was one of our customers. And I was working in Talent Management and HR Development teams in the previous company. My interest in the HR area was getting more focused on the organization development from the corporate culture perspective. Last year, our corporate culture division was established in Rakuten Inc. And my current boss, Tatsuo Hidaka, asked me to join that division. So, I decided to leave the previous company and joined Rakuten last December.

How many are you in the Employee Engagement Department?

TA: Roughly eight people. Some recent leave the company and we are around eight people. But in overall, we are 21 people in the Corporate Culture Department.

Are you link to another department or you work as an independent?

MA: So, in our division, Kobayashi Seichu is head of our department and co-founders of Rakuten Inc. His title has already changed and is the Chief Well-Being Officer (CWO). There are now three divisions in the Corporate Culture Department: Sustainability department and its Lab. In addition to this department, Wellness Department has just moved from the different divisions.

TA: Corporate Culture Department (CCD) consists of three departments: Employee Engagement, Sustainability Department and Wellness Department. Wellness is focusing on the employee's personal wellness, Employee engagement is focusing on the employee's organization and connection, and Sustainability Department is focusing on society, contribution to society. So, CCD has three jobs: personal, organization and outside organization, society. We are working on three levels: the individual, the team and the society.

Did you decided to divide, on purpose the corporate culture into those three departments?

MA: At this moment, there is no CCD office in each region, but we have a counterpart. It is not really structured as it sounds.

TA: For example, Tatsuo Hidaka is around Asia. He has a second position as General Manager of Corporate Culture in the Regional Head Office of Asia.

MA: He is an expert in Singapore. There is an office in CCD in the Asian region.

TA: As I said, last year we could only focus on Japan, because of our resources. However, after that, we started build a network of each region. So, we started our activities more globally. But the basic idea is to make the relationship with each region as a network. So, they are considered as our partners. We divided our businesses into several categories to build an ecosystem. So, we have someone as an observer to lead the company's culture promotion in each company. And we are trying to assign several culture leaders in each region as well. Mark Havilland is one of the candidates in Europe.

**“Contribute to society by creating value through innovation and entrepreneurship”:
How do you link the e-commerce (innovation, entrepreneurship) industry with employee
engagement (value created)?**

MA: I think my understanding as Rakuten was founded, they started e-commerce, and they were doing business with "Papa-Mama Shop", small, family-owned shops. But as the digitization or internet became more familiar, we try to buy the products on the internet. In the local area, these popular shops are suffering to manage their own shop. So Rakuten offers the platform for them to buy their products on the internet, so they can sell the products to the local people. In local area, people are quite limited. But on the internet, they can sell their product to anyone in Japan and on the globe. They could find out the opportunity to survive. This is what Rakuten means by "empowering", that's our mission: Empower the margins, the small margins to survive on the internet.

TA: Our CEO and Founder, Mr. Mickey Mikitani started our service called Rakuten Ichiba in order to empower the society and the local people. He was thinking, by starting this market in Japan, but he tended to expand our business more globally in the future. Nowadays, he believes our core idea of Rakuten Ichiba to empower society can be applied to all global markets, compared to the global giant from the US, such as Amazon, or some other e-commerce services. As you may know, we acquired several e-commerce companies in Europe, in 2010, including in United Kingdom, France, Germany on so on. The reason why we acquire this kind of companies is because their business model is was like ours, like a marketplace model. Our business model is different from the Amazon's model.

Marketplace model has the idea to make a good relationship with each merchant. We started to collaborate with them. Unfortunately, we stopped with several businesses in Europe, but our CEO, Mickey still believes in our original idea. So, we started to tell and teach our core ideas to empower society. Last year, we made some workshop contents for our global members, conferences in each region to tell our story; and, we invited our global managers, every month in this headquarters office in Japan. We are currently holding a workshop, around 50 people are here, including many European members and managers, to understand our history and their core mindset and philosophy. We had the Rakuten History workshop yesterday, in a form of board game. "Gamification" idea is easy to learn something, so we developed Rakuten History board game to learn history and our original business model and background, why we created our philosophy called Rakuten Shugi, so they can learn our history and our core

philosophy, and bring this idea to each company and their country. We really expect them to penetrate this kind of ideas in each country.

How do you make sure the process is understood for each people and how do measure that?

MA: That's a good question.

TA: It is difficult to check correctly. But we do a pre-survey and a post-survey, then compare the changes of each members attitude and initiatives. And, the last day of the workshop, they need to make a presentation on their initiatives in each country and the company from now one. Unfortunately, we haven't checked their progress, yet.

MA: We do not have the official assessment post-workshop. But I launched to the program for global managers. And we invited 30 people for the first batch, this March. When I visited Paris in June, so three months after the program, and I met some of the alumni in France. And after coming back to their home office, they gave a presentation to the whole employees in each entity. Fabien Versavau, CEO of Rakuten France, was so impressed, because after participating on the program, they change their behaviors.

Rakuten acquired the local company, and we put one of the main practices: "the name badge". We have eight practices, one of these eight practices is that we need to wear our name badges all the time in the office. Every Monday, we need to clean up our desk. It is okay for us, Japanese, but it can be strange for foreign partners, because it is not part of the job, and not written in the job description. But this is our traditional practice. So, it's hard to explain, because we just told them "Just do it, just do the cleaning", because this is a Rakuten way. But we need to change the way because it's kind of forcing them to do, there is no explanation "why that we need to wear the name badge", or "why we do the cleaning" we didn't explain the reason, in the background. During the program, we explain the reason one after another on why such practices, so they understood and could easily accept those practices compared to before they participate in the program. Then, they explain the reason and background of each practice in their own way, in their own language, so the employees in each regional and local office can understand easier than if it was explained by the Japanese Headquarters' colleague or boss.

So, to take the example of Rakuten France, Fabien was so appreciated, because they explain in their own words, and they also show their behaviors. We try to create the kind of opportunities not officially, but informally as we visit each location on the business trip. We try

to meet the alumni of the program and how it's changed before and after the program. And we tried to assess the change of their behaviors.

TA: We're still in the middle of the process, and it expose different points of view. From the company's point of view, we made culture surveys to check their attitude to understand and make actions about this kind of practices, whether it is ID badges or desk cleaning and so on. We have tried to do the survey in several subsidiaries and countries.

What are the similarities and differences between your department and Human Resources department?

TA: Momoko had a second position in HR. And, I used to be a HR manager. But our HR department change the direction to focus on operations, because while we are acquiring a lot of new talents all over the world, very rapidly, we need to do more operational tasks, including Skill Trainings, making new compensation system and then implement it to our HR abroad. On the other hand, we merely need to focus on engagement or more "soft skill", mindset, philosophy, and so on. So, in addition to HR operation, we started our division to collaborate with them very closely, even now. We are in the same direction, from the corporate point of view.

MA: My understanding is also almost the same. Group HR (GHR) is much more focusing on the HR department side, a ton of management, skill training. So, it's related to the promotion system, variation system, and our competencies are linked to the five principles for success, of the Rakuten Shugi. So, the group HR area and our area, of course, are overlapped in some area. But we are much more focusing on the corporate culture side.

TA: But I think in each region, HR people are working with some of our colleagues from CCD.

Does your implication is regional-based or national-based?

MA: There is a Rakuten European headquarters, located in Luxembourg, and under them, there are eight or nine entities. It's a business: Rakuten France is focused on e-commerce. Rakuten TV, our digital content for TV is in Spain Yeah. So, we are working with each business depending on the topic but we're working through Rakuten Europe HR. So, depending on the topic, we will communicate directly with each entity. If the topic is a European matter, we need to talk to Rakuten Europe, but challenges or issues related to the culture perspective are quite locally unique. So, we directly communicate with each entity.

TA: When we held the Culture Conference for Europe, we access the European headquarters directly and so they announced this event to all HRs in Europe.

MA: Because European HR cannot cover all the issues, so they want to focus on the region matter but when the local issue is really, they asked us to communicate directly. Of course, we can consult them as well.

In the future coming, is it possible to have an Employment Engagement department in Europe to coordinate your activity all the way to Europe?

MA: I think Toby Otsuka, CEO of Rakuten Europe try to create a corporate culture division in Europe. He's the perfect counterpart with CWO Kobayashi and they are discussing about the organization.

TA: Currently, we are creating the contents of corporate culture workshops, to make our partners hold these kinds of workshops in each subsidiary and regions. We started this initiative to be in Japan, we succeed on making new facilitators in new business in Japan. And we are planning to expand these initiatives not only in Japan, but also in each region. We had assigned a new member in Asia. He is an employee from Philippines, and he works in Singapore. He is working with Tatsuo Hidaka. Maybe he will start to make initiatives for Asia and then on another region soon. We are preparing ourselves for that.

In Rakuten Europe, we observe also the presence of a Corporate Communication Department. What is the difference between this department and your department?

TA: We don't have concrete Corporate Communication Department in our Japan headquarters. We have a Public Relations team for not only outside, but also for internal employees. They are the ones, creating news and videos every day, but they don't tell the story of our philosophy, we do it's our task. CWO Kobayashi is thinking about collaborate more closely, between we and themselves, but I think in each region, they have the corporate communication function. We are telling the story, and they translate the story in multiple language on every communication channel.

Did you, so far since the department has been created, have come across with encounters from counterpart from Europe?

MA: Regarding our activities, I have not received negative feedback so far. During July, CWO Kobayashi visited 78 entities in Europe region, and for almost all the entities, it was the first time to welcome Japanese executives. If our Founder must visit Europe, he will just meet CEOs and Executives, but our CWO met all the all the people, all employees, he had a town hall meeting and a workshop for all the managers, spend lunch and dinner together. That kind of visit was the first time for them. It was very close; they could talk and meet. So, they were so happy to see and talk directly with the executive, and especially one of the co-founders of Rakuten Inc. So far, I didn't have negative comments at the time. But when we introduced and delivered the workshop for them, we were mainly talking about the experience and incidents in Japan. Some cases are okay, but some cases are not easy for them to understand, because they have the different culture and they're living in a different context. We didn't explain all the details, and that's why we thought we should prepare for the overseas or local cases, contents for them to understand more easily. That will be the next challenge for us. I plan to visit the London office in November and tried to add more appropriate cases and how we should deliver the message properly for them to understand clearly. Maybe my English is not perfect for them to understand, but we try to clarify, what's the main message and how they can understand that the better way.

TA: Unfortunately, despite the 'Englishnization' process, there are some communication issues. Even if we really improve our English skill, our communication style and skill is different. It has to do with high context and low context issues: Japanese people tend to be regarded as a high context people, by not to telling the details. When we tell our philosophy in Japan, we usually say "let's do it" or "well, please do it" without any reasons. Before workshops we organize, we had received a lot of negative feedbacks about how to penetrate our philosophy in each region, because we only use the Japanese way to deliver the message. So, we change the way to deliver the message by telling the story, telling the background, about why we started this philosophy, why we started this customer practice and software. It's very natural for non-Japanese people, but as Japanese, we needed to change our mind. It's one of the biggest issues for the Japanese headquarters.

Do you receive any proposition for improvement from overseas offices you are working with?

TA: Right, we do. We currently try to assign the HR Training Leader from the US as our advisor for our initiatives from next month. You should know that the Group Headquarter is in Tokyo, but the International Human Resources Department is in San Mateo, United States. And he just moved to London, UK. They advised us to change the way to deliver in a more global way.

We decided to ask them to have our initiatives from their point of view. It's very natural and common in Rakuten and a little bit different from Japanese traditional multinational company.

MA: Another reason is because they're overseas affiliates. And despite organic growth, and the fact that they were acquired by Rakuten, we need to respect the cultural aspect. Otherwise, we can't win this one together.

TA: We respect each different culture in in each country and each subsidiary. This is our message here.

MA: Each company, business, and region has its own color, your color stands for the culture or values. But Rakuten group, as a common language, common, value we need to understand here the culture, without conquering them. Respecting the culture is our competitive advantage.

TA: Sometimes, some of the subsidiaries got good value on the practices from each country, and we can implement them into our HQ, to get the same value here.












MA: At this moment, unfortunately, each entity in each region doesn't understand fully Rakuten Shugi. Now, we are on the process to deliver first, what's the Rakuten Shugi, who we are, how we developed and grow so far. Each business, each department, each division, each people overseas has a unique value, and we are looking for this unique aspect to increase our competitive advantage.

TA: And in the next phase, we will create a new Rakuten Shugi "together".

Annexe 17
Nœuds de Codage – Cas Rakuten
NVivo12

Rakuten

Codes

 Nom
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 <input type="radio"/> La stratégie de RAKUTEN INC
<input type="radio"/> Stratégie centralisée par le siège global
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<input type="radio"/> Concepts de marque (Brand Concepts)
<input type="radio"/> Evolution de OPTIMISME selon RAKUTEN INC
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Codes

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Codes

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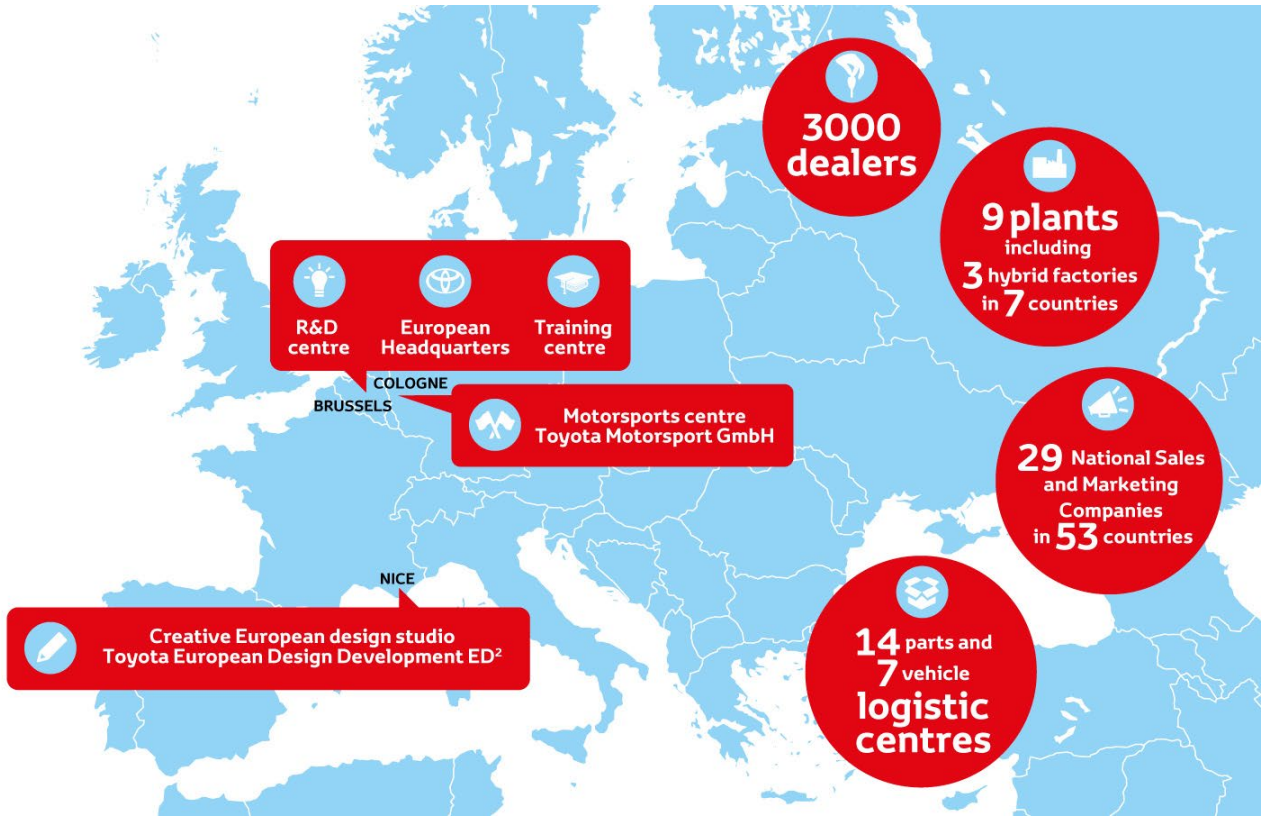
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	<input type="radio"/> Comment il comprend son rôle au sein de RAKUTEN
	<input type="radio"/> Il a conscience du positionnement de l'organisation

Annexe 18

TOYOTA

IN EUROPE – FACTS & FIGURES

Presentation



TOYOTA IN THE WORLD

	Established in 1937	71 manufacturing operations	28 countries & regions outside of Japan	€20.2B Net income in FY19-20	~370k employees worldwide
	Vehicles sold in 170+ countries & regions	9.53M vehicles sold in CY2020	JAPAN MARKET SHARE 49.9% in CY2020		
	17M+ cumulative Electrified vehicles sales	140M+ tonnes CO ₂ saved globally	55 Electrified models <small>IN OVER</small>	90 countries & regions	



TOYOTA

HEADQUARTER OPERATIONS



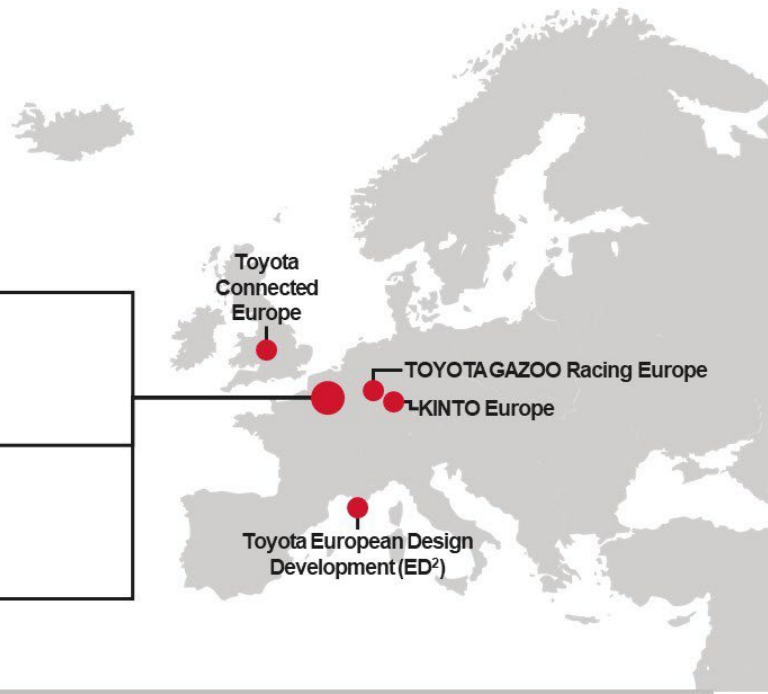
Technical centre



Training centre



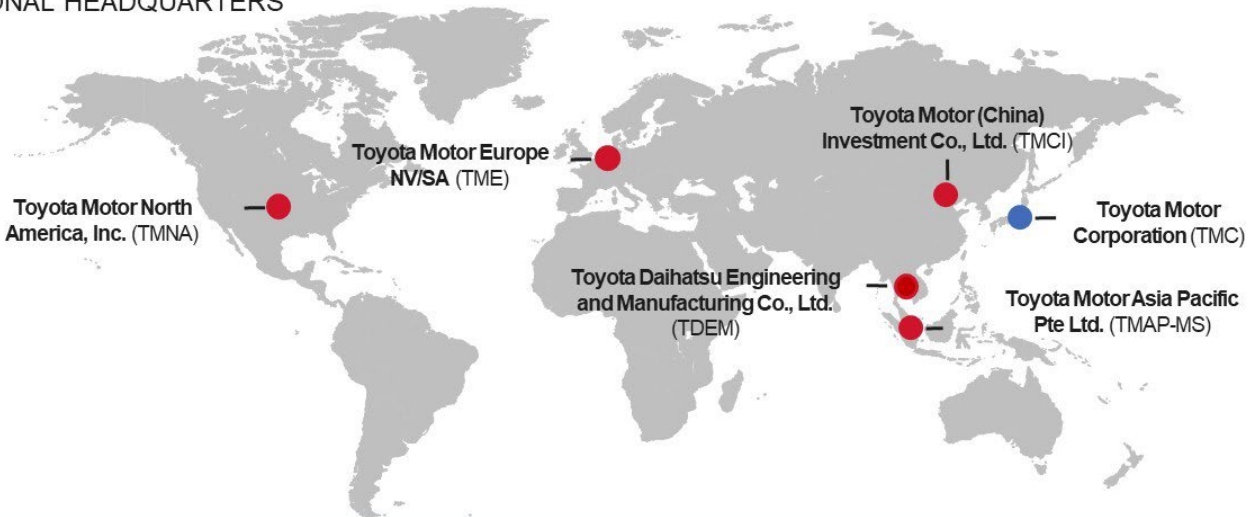
TME Head Office



TOYOTA

TOYOTA IN THE WORLD

REGIONAL HEADQUARTERS



TOYOTA

TOYOTA IN EUROPE



€10B+
invested
since 1990

€6B+
spent with 400 European-
based suppliers p/year

Approx.
25k+
Direct employees



Began selling
cars in
1963

993,113
Vehicles sold in
CY2020

MARKET SHARE
6.0%
in CY2020



3M+
Toyota & Lexus
Electrified vehicles
sold

54%
Electrified mix in CY2020
sales

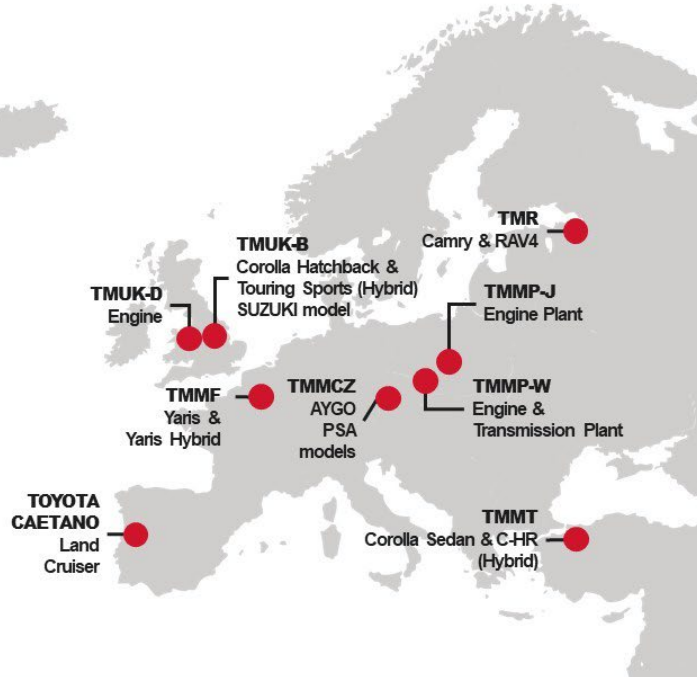


TOYOTA

EUROPEAN MANUFACTURING COMPANIES

9 manufacturing plants in 7 countries

8 out of 10 Toyota vehicles sold in Europe
are manufactured in **Europe**



Plants

TOYOTA

EUROPEAN LOGISTICS COMPANIES

14 Parts Logistics Centres

7 Vehicle Logistics Centres

● Parts ● Vehicles



TOYOTA

NATIONAL MARKETING & SALES COMPANIES

29 NMSCs

Vehicles sold in 53 countries

Around 2,500 Toyota retailers

Around 350 Lexus retailers

● NMSCs



TOYOTA

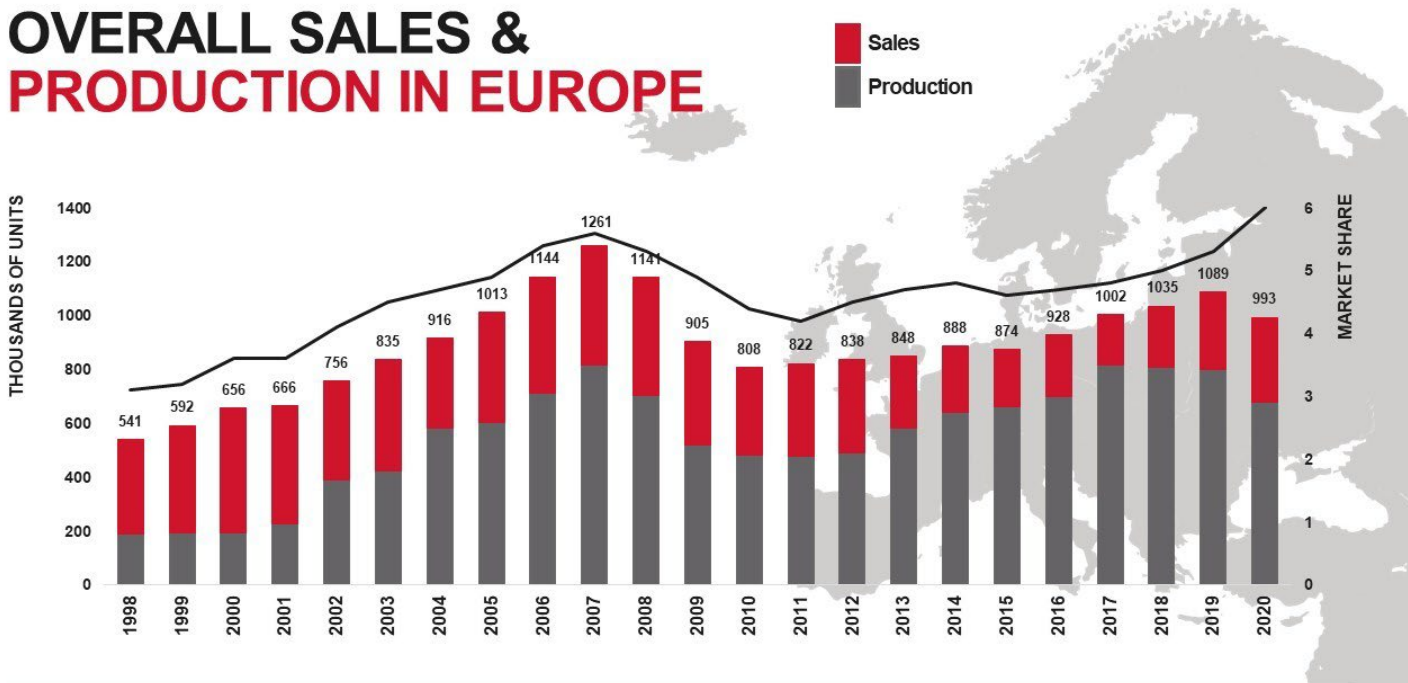
MAJOR MARKETS IN EUROPE (2020)



¹Includes sales in Russia, Belarus and Armenia (responsibility of Toyota Motor Russia (TMR))

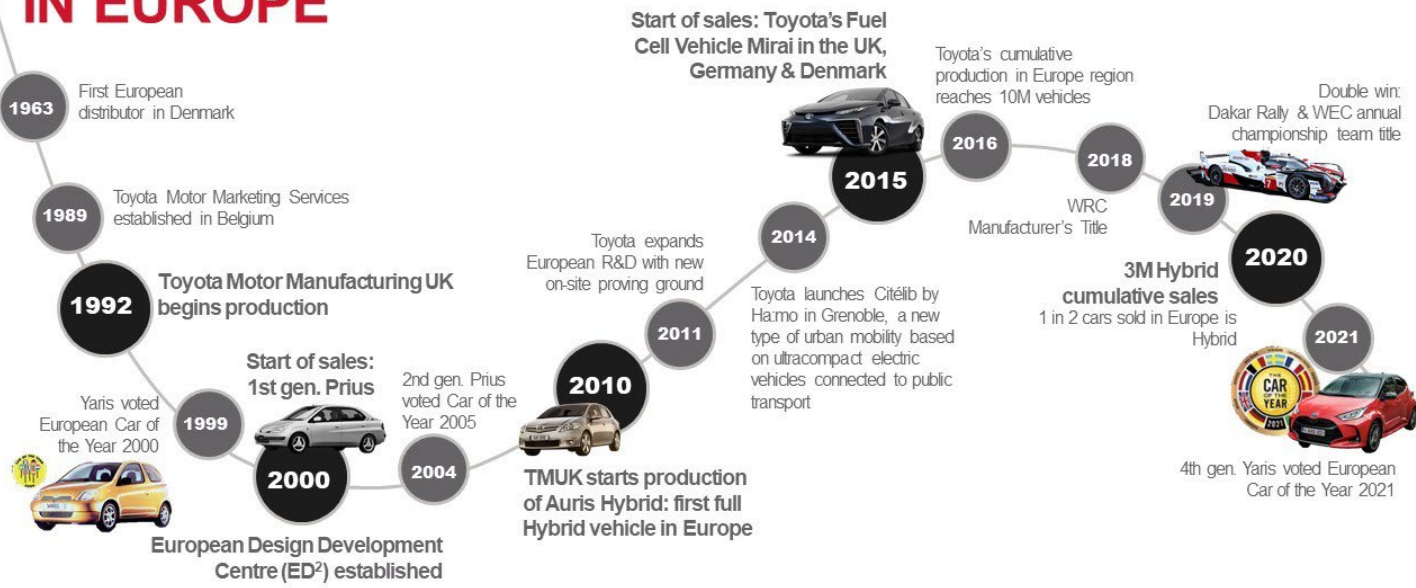
TOYOTA

OVERALL SALES & PRODUCTION IN EUROPE



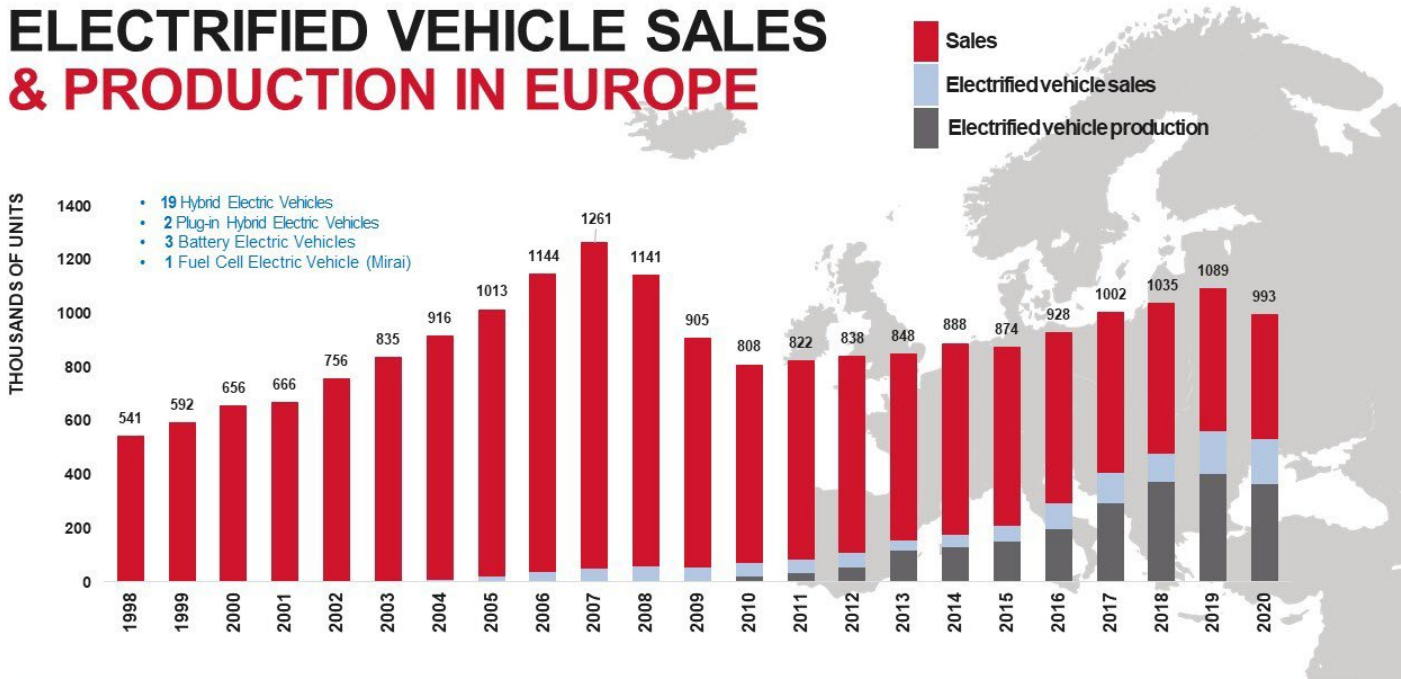
TOYOTA

OUR HISTORY IN EUROPE



TOYOTA

ELECTRIFIED VEHICLE SALES & PRODUCTION IN EUROPE



TOYOTA

Annexes 19 - 21
Factsheets
2019

Toyota Motor Europe Factsheet 2019
Toyota European Manufacturing Companies (EMCs) Factsheet
Toyota European Part & Vehicle Logistics Centers Factsheet

TOYOTA

Toyota Motor Europe NV/SA

Toyota Motor Europe NV/SA (TME) oversees the wholesale sales and marketing of Toyota and Lexus vehicles, parts and accessories, and Toyota's European manufacturing and engineering operations. Toyota directly employs over 25,000 people in Europe and has invested over EUR 10 billion since 1990. Toyota's operations in Europe are supported by a network of 29 National Marketing and Sales Companies across 53 countries, a total of around 3,000 sales outlets, and nine manufacturing plants. In 2019, Toyota sold 1,089,422 Toyota and Lexus vehicles in Europe.

For more information, visit www.toyota-europe.com

Location TME Head Office – Avenue Du Bourget 60, 1140 Brussels, Belgium

President & CEO Dr. Johan van Zyl

Establishment October 1st 1990

More info

Toyota's European Newsroom:	http://newsroom.toyota.eu
Toyota's European Website:	http://www.toyota-europe.com
Follow us on Twitter:	@toyota_europe
Follow us on LinkedIn:	https://www.linkedin.com/company/toyota-motor-europe
Toyota Europe YouTube Channel:	http://www.youtube.com/ToyotaEurope

LOCATIONS

TME - Head Office

TME Zaventem Technical Centre

TME Zaventem Training Centre

TME Toyota After Sales Centre

TME Toyota Europe Design Development S.A.R.L. "ED2"

TOYOTA GAZOO Racing Europe GmbH (TGR-E)

Toyota Connected Europe (TCEU)

Toyota Fleet Mobility (TFM)

Toyota Motor Europe - Head Office

Location Avenue du Bourget 60 - 1140 Brussels, Belgium

Function Toyota Motor Europe co-ordinates numerous functions for the region, from sales and marketing to the design, research and development of our future models.

Establishment 1990

Employees 706 (excl. Contingency, interns, contractors)

Total Investment approx. 1 billion EUR (TME in Belgium)

Floor surface + 28,069 m²

Land surface + 117,590 m²

Toyota Motor Europe - Technical Centre

Facility Toyota Technical Centre

Location Hoge Wei, 33A 1930 Zaventem, Belgium

Function Technical Centre is the location for the Research & Development (R&D), Purchasing and Production Engineering (PE) functions. From there Toyota ensures its cars match European customer's demands. R&D undertakes body, powertrain, chassis and electronics design, the selection and testing of materials and components, engine evaluation, and the adaptation of the driveability characteristics of all Toyota models. PE undertakes plant building construction and equipment and tooling preparation for mass production. Purchasing oversees the procurement of more than €3 billion of parts and materials each year. Technical Centre also houses a part of Toyota Motor Europe's Information Systems division. The newly added Production Styling function kicked off in 2016.

Area of Site 19 ha.

Floor Surface 26,000 m²

Building Completion

Phase 1 : September 1987

Phase 2 : January 2006 (extension of workshop and office buildings)

Phase 3: July 2011 (building of Proving Ground)

Phase 4: TCB3 building was finalized and in use from January 2017

Total Investment €282 million

Employees 833 (excl. Contingency, interns, contractors)

Toyota Motor Europe - Training Centre

Location	Hoge Wei, 33C – Zaventem, Belgium
Function	Provides essential training to Technical and Service trainers and Repair Support staff from Toyota's NMSCs.
Total Investment	€7.6 million
Employees	7 (excl. Contingency, interns, contractors)
Establishment	Oct-90
Floor surface	4,100 m ²
Land surface	7 ha.

Toyota Motor Europe - After Sales Centre

Location	Avenue du Bourget 60 - 1140 Brussels, Belgium
Function	The building houses: Quality Function (incl. Manufacturing Quality, Material & Parts Quality, Project Quality, Customer Quality Engineering, Regional & Campaign Operations, Warranty and Quality Planning) and Value Chain, including Strategy, Process and Programme Management, Operations, Product Management, Planning, Development, Technical Support, VC Quality & Homologation for Parts and Accessories.
Total Investment	€18.8 million
Employees	219 (excl. Contingency, interns, contractors)
Establishment	Dec-94
Floor surface	10,000 m ²
Land surface	11.7 ha.(incl. Head Office)

Toyota Europe Design Development S.A.R.L. "ED²"

Location	Sophia Antipolis International Science Park - Région Provence-Alpes-Côte d'Azur Toyota Europe Design Development 2650 Route des Colles, BP 253 - 06905 Sophia-Antipolis Cedex - France
Function	Advanced design development (exterior design, interior design, colour design, mobility design and strategy), model production and design research. ED ² 's main objective is the creation of new design proposals and solutions for Toyota and Lexus in the Global Market. It is part of the Global Toyota design network which consists of six centers in the world. The first Yaris, "Car of the Year 2000" - produced in the Toyota plant of Valenciennes -, was one of the first models developed by this European center. Since then, ED ² has developed the Lexus SC430, Corolla & Corolla Verso, Land Cruiser, Verso, Avensis, Prius III, CS&S, MTRC, ENDO, URBAN CRUISER, Hybrid X, Concept Car iQ, FT-86 concept (Tokyo 2009), FT-CH (Detroit 2010) and PRIUS-c concept shown at Detroit 2011 MS, MEWE (LRVT 2012), CH-R (Paris 2013), Lexus LF-SA (GVA 2015), Lexus UX Concept (Paris 2016), i-TRIL(Geneva 2017), initial concept of e-Palette (CES Las Vegas), Toyota e-Trans, e-RACER, e-4me, e-Charreair, e-Care (Tokyo2019).Lexus LF30Electrified (Tokyo 2019)
Total Investment	17.8 million
Investment Structure	100% subsidiary of TMC
Employees	41 (excl. Contingency, interns, contractors)
Establishment	Nov-98
Start of Operations	May-00
Floor surface	Approximately 6,000m ² (20% larger than former EPOC) (Total site area: about 40,000m ²)

TOYOTA GAZOO Racing Europe GmbH (TGR-E)

Location	Toyota-Allee 7, D-50858 Cologne, Germany
Function	Comprehensive support for participation in WEC; engine supply for WRC; production car development
Features	Two wind tunnels, extensive R&D test and simulation facilities, production area for composites, CNC, rapid manufacturing. Workshop for maintaining race cars, as well as servicing LFA road cars.
Area of Site	30,000m ²
Floor Surface	55,000m ²
Establishment	1979
Employees	300 (excl. Contingency, interns, contractors)

Toyota Connected Europe (TCEU)

Location	14 Handyside St, N1C 4LW London, UK
Function	By leveraging the power of data science, predictive intelligence, and Toyota's Mobility Services Platform, Toyota Connected Europe is building solutions to transform how customers across Europe experience mobility.
Establishment	Apr-18
Floor surface	409m ²
Employees	70 (excl. Contingency, interns, contractors)
Investment	Initial investment of GBP 4.5 million

KINTO Europe GmbH

Location	Toyota Allee 5, 50858 Cologne, Germany
Function	Marketing, sales and management of operational car leasing, including Full Service leasing, fleet management services as well as Mobility Products. https://www.kinto-mobility.eu
Establishment	Oct-18 (Toyota Fleet Mobility GmbH, established in October 2018, was re-named to KINTO Europe GmbH on 1 April 2021)
Floor surface	368 m ²
Employees	12 (excl. Contingency, interns, contractors)
Investment	Registered Capital EUR 5 million, Capital Surplus EUR 15 million

Toyota European Manufacturing Companies

Toyota Motor Manufacturing UK (TMUK)
Toyota Motor Manufacturing France (TMMF)
Toyota Motor Manufacturing Poland (TMMP)
Toyota Motor Manufacturing Turkey (TMMT)
Toyota Motor Russia (TMR Saint Petersburg)
Toyota Caetano Portugal (TCAP)
Toyota Peugeot Citroën Automobile Czech (TPCA)

Toyota Motor Manufacturing (UK) Ltd (TMUK)

Total investment for both plants	£2.78 billion
Employees at both plants	3,148 (excl. Contingency, interns, contractors)

PASSENGER CAR PLANT

Facility	Toyota Motor Manufacturing (UK) Ltd	
Location	Burnaston, Derbyshire	
Site Area	2.35 million m ²	
Start of Production	16 December 1992	
Models Produced	Corolla Hatchback, Corolla Touring Sport	
Manufacturing Processes	Pressing of body panels, welding, painting, plastic mouldings, assembly	
2020 Production	Corolla Hatchback:	50,489 units
	Corolla Touring Sports:	65,740 units
	Suzuki:	4,251 units
	Total:	120,480 units

ENGINE PLANT

Facility	Toyota Motor Manufacturing (UK) Ltd
Location	Deeside, Flintshire, North Wales
Site Area	0.48 million m ²
Start of Production	08 September 1992
Engines Produced	VVTI-L petrol engines : 1.6L, 1.8L, 1.8L Hybrid
Manufacturing Processes	Machining, assembly, testing, aluminium casting
2020 Production	245,322 units

Toyota Motor Manufacturing France SAS (TMMF)

Facility	Toyota Motor Manufacturing France SAS
Location	Parc d'Activités de la Vallée de l'Escaut Sud, BP16, 59264 Onnaing near Valenciennes, Nord Prefecture, France
Site Area	Total area of site: 233 hectares
	Total building area: 180,000 m ²
Date of Establishment	October, 1998
Start of Production	Jan, 2001
Total investment	€1.4 billion
Models Produced	4th generation Yaris 1.0L petrol, 1.5L petrol, 1.5L Hybrid
2020 Production	188,142 units
Employees	4,301 (excl. Contingency, interns, contractors)

Toyota Motor Manufacturing Poland Sp.zo.o (TMMP)

Total investment for both plants	PLN 5.1 billion
Employees	2,800

ENGINE & TRANSMISSION PLANT

Location	Walbrzych, Dolnoslaskie Province, Poland	
Site Area	Approx. 520,000 m ²	
Floor Space	Approx. 100,000 m ²	
Date of Establishment	Sep, 1999	
Start of Production	Apr, 2002	
Engine produced	1.0L petrol for AYGO and Yaris	
Transmissions produced	Manual transmission for vehicles with 1.0L to 1.8L engines for AYGO, Yaris, Corolla (TMUK, TMMT, Toyota South Afira Motors & Toyota Motor Corporation), C-HR Multi-mode transmissions for AYGO, Yaris	
Transaxles produced	Hybrid Transaxles for 1.8L Hybrid for Corolla, C-HR	
2020 Production	Transmissions & hybrid transaxles:	410,442 units
	Engines:	194,405 units

ENGINE PLANT

Location	Jelcz-Laskowice, Dolnoslaskie Province, Republic of Poland	
Site Area	Approx. 300,000 m ²	
Floor Space	Approx. 49,000 m ²	
Date of Establishment	October, 2002	
Start of Production	March, 2005	
Engine produced	1.5L HV/petrol for Yaris and Corolla Sedan 2.0L TGNA HV/petrol for Corolla (TMUK), C-HR, RAV4	
2020 Production	206,642 units	

Toyota Motor Manufacturing Turkey, INC. (TMMT)

Facility	Toyota Motor Manufacturing Turkey, Inc.	
Location	Arifiye / Adapazari, Turkey	
Site Area	917,000 m ²	
Floor Space	225,500 m ²	
Date of Establishment	Jul, 1990	
Start of Production	September, 1994	
Total investment	€2 billion	
Models Produced	Corolla Sedan, Toyota C-HR	
2020 Production	C-HR:	131,663 units
	Corolla Sedan:	87,728 units
	Total:	219,391 units
Employees	5,056 (excl. Contingency, interns, contractors)	

OOO Toyota Motor (TMR Saint Petersburg)

Facility	OOO Toyota Motor	
Location	196626, Russia, Saint Petersburg, Posyolok Shushary, Sofiyskaya street, 115 A	
Site Area	224 ha	
Date of Establishment	May, 2005	
Start of Production	Dec, 2007	
Total Investment	RUB 37.9 billion	
Models Produced	Camry, RAV4	
2020 Production	Camry:	30,373 units
	RAV4:	37,020 units
Employees	2,332 (excl. Contingency, interns, contractors)	

Toyota Caetano Portugal S.A. (TCAP)

Location	Ovar, Portugal	
Site Area	310,618 m ²	
Date of Establishment & Start of Production	1971	
Total Investment	€54.78 million (by Toyota Motor Europe)	
Models Produced	Land Cruiser 70 series directly exported to Toyota South Africa Motors	
2020 Production	1,465 units	
Employees	173 (excl. Contingency, interns, contractors)	

Toyota Motor Manufacturing Czech Republic (TMMCZ)

Facility	Toyota Motor Manufacturing Czech Republic (TMMCZ)	
Location	Kolin, Czech Republic (60 km east from Prague)	
Area of Site	124 ha	
Start of Production	28.2.2005	
Total Investment	CZK 4 billion	
Models Produced	Toyota AYGO, Peugeot 108, Citroën C1 to be fitted with the latest 1.0-l gasoline engines (Toyota)	
2020 Production	81,296 units (Toyota AYGO)	
Employees	3,200 (excl. Contingency, interns, contractors)	

Toyota Parts and Vehicle Logistics Centres

Parts:	Vehicles:
Toyota Parts Center Austria (TPCAT)	Toyota Logistics Services Czech (TLSCZ)
Toyota Parts Centre Europe (TPCE)	Derby Logistics Centre
Toyota Parts Centre South of France (TPCSF)	Malmö Nordic Vehicle Hub
Toyota Parts Centre Denmark (TPCDK)	Sagunto Vehicle Hub (TLSES)
Toyota Parts Center Finland (TPCFI)	Adapazari Vehicle Hub (TLST)
Toyota Parts Centre Norway (TPCNO)	Valenciennes Vehicle Hub (TLSFR)
Toyota Parts Centre Spain (TPCES)	Zeebrugge Vehicle Centre
Toyota Parts Centre GB (TPCGB)	
Toyota Parts Center Germany (TPCDE)	
Toyota Parts Centre Greece (TPCEL)	
Toyota Parts Centre Czech (TPCCZ)	
Toyota Parts Centre Ireland (TPCIE)	
Toyota Parts Centre Poland (TPCPL)	
Toyota Parts Centre Portugal (TPCPT)	

Toyota Parts Center Austria (TPCAT)

Location	Richard-Strauss-Strasse 34 A-1231 Wien (Austria)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Austria, Hungary, Slovak Republic, Slovenia, Croatia, Bosnia, Serbia, and Romania
Total Investment	€3.7 million
Parts & Accessories Handled	Outgoing lines: estimated at 5.400 orderlines/day
Number of Delivery Points (Retailers)	283
Employees	33 (excl. Contingency, interns, contractors)
Site Take-over	Aug-01
Launch of operations	Jan-02
Warehouse surface	13,000 m ²

Toyota Parts Centre Europe (TPCE)

Location	Industrieterrein 11 - 3290 Diest (Belgium)
Function	TPCE supplies parts and accessories to the national depots of NMSCs in Europe, to the regional TME depots and to approx. 500 delivery points in Belgium, Luxemburg, the Netherlands and the North of France.
Total Investment	€129 million
Parts & Accessories Handled	Approx. 11 million pieces per month (approx. 526.5K pcs/day binning/picking)
Number of Delivery Points (Retailers)	665
Employees	976 (excl. Contingency, interns, contractors)
Establishment	Jan-93
Floor surface	100,000 m ²
Land surface	24 ha.

Toyota Parts Centre South of France (TPCSF)

Location	Parc industriel Rhône Vallée - 07250 Le Pouzin (France)
Total Investment	€10.3 million
Function	Order processing, warehousing and delivery of service parts and accessories to South of France, Corsica, Andorra, Malta, Morocco and Tunisia.
Technology	Bar Code readers and real time radio frequency data transmissions
Site Completion	Jun-01
Supply Routes	By truck from Toyota Parts Centre Europe in Belgium
Launch of Operations	Oct-01
Employment	44 (excl. Contingency, interns, contractors)
Number of Delivery Points (Retailers)	189
Parts & Accessories Handled	Outgoing lines: approximately 6.900 orderlines/day
Warehouse surface	7,698 m ²

Toyota Parts Center Denmark (TPCDK)

Location	Fynsvej 9 – 5500 Middelfart (Denmark)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Denmark and Sweden
Total Investment	€ 1.5 million
Parts & Accessories Handled	Outgoing lines: approximately 5.000 orderlines/day
Number of Delivery Points (Retailers)	184
Employees	38 (excl. Contingency, interns, contractors)
Launch of operations	Sep-02
Warehouse surface	10.390 m ²

Toyota Parts Center Finland (TPCFI)

Location	Korpivaarantie 1, PB 12 – 3003 Vantaa (Finland)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Finland, Estonia and is responsible for the replenishment of large body parts towards the central warehouse of Toyota Motor Russia in Moscow
Total Investment	€ 2.8 million
Parts & Accessories Handled	Outgoing lines: approximately 4.000 orderlines/day
Number of Delivery Points (Retailers)	98
Employees	27 (excl. Contingency, interns, contractors)
Launch of operations	Mar-03
Warehouse surface	11.923 m ²

Toyota Parts Center Norway (TPCNO)

Location	Svelvikveien 59B, P.O.Box 66 – 3003 Drammen (Norway)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Norway and Sweden
Total Investment	€ 3.5 million
Parts & Accessories Handled	Outgoing lines: approximately 8.300 orderlines/day
Number of Delivery Points (Retailers)	138
Employees	48 (excl. Contingency, interns, contractors)
Launch of operations	Nov-02
Warehouse surface	10.884 m ²

Toyota Parts Centre Spain (TPCES)

Location	Avenida Logistica 44 - 45200 Illescas (Toledo) (Spain)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Spain
Total Investment	€ 23.2 million
Parts & Accessories Handled	Outgoing lines: approximately 6.600 orderlines/day
Number of Delivery Points (Retailers)	208
Employees	43 (excl. Contingency, interns, contractors)
Launch of operations	Mar-03
Warehouse surface	19.600 m ²

Toyota Parts Center GB (TPCGB)

Location	Shackleton Way (Unit 2200), Magna Park, Lutterworth – LE17 4XP Leicestershire (UK)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in the United Kingdom
Total Investment	€ 8.7 million
Parts & Accessories Handled	Outgoing lines: estimated at 15.700 orderlines/day
Number of Delivery Points (Retailers)	249
Employees	83 (excl. Contingency, interns, contractors)
Launch of operations	Oct-03
Warehouse surface	15.720 m ²

Toyota Parts Center Germany (TPCDE)

Location	Toyota Allee 2 – 50858 Köln (Germany)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Germany
Total Investment	€8.9 million
Parts & Accessories Handled	Outgoing lines: approximately at 9.000 orderlines/day
Number of Delivery Points (Retailers)	539
Employees	69 (excl. Contingency, interns, contractors)
Launch of operations	Dec-03
Warehouse surface	17.963 m ²

Toyota Parts Centre Greece (TPCEL)

Location	Thesi Kirillo – 19 300 Aspropirgos Attiki (Greece)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Greece, Bulgaria, FYROM, Albania and stock replenishment to NMSC in Cyprus
Total Investment	€ 2.2 million
Parts & Accessories Handled	Outgoing lines: approximately 3.300 orderlines/day
Number of Delivery Points (Retailers)	102
Employees	31 (excl. Contingency, interns, contractors)
Launch of operations	Oct-05
Warehouse surface	7.165 m ²

Toyota Parts Centre Czech (TPCCZ)

Location	Prumyslova 92 – 417 42 Krupka (Czech Republic)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in the Czech Republic and part of Germany
Total Investment	€ 15.6 million
Parts & Accessories Handled	Outgoing lines: approximately 4.200 orderlines/day
Number of Delivery Points (Retailers)	298
Employees	36 (excl. Contingency, interns, contractors)
Launch of operations	Jul-07
Warehouse surface	11.689 m ²

Toyota Parts Centre Ireland (TPCIE)

Location	Toyota House – Killeen Road – Dublin 12 (Ireland)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Ireland
Total Investment	€ 1.6 million
Parts & Accessories Handled	Outgoing lines: approximately 2.400 orderlines/day
Number of Delivery Points (Retailers)	58
Employees	18 (excl. Contingency, interns, contractors)
Launch of operations	Apr-04
Warehouse surface	7.020 m ²

Toyota Parts Centre Poland (TPCPL)

Location	ul. Poleczki 23 – 02 822 Warszawa (Poland)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Poland , Lithuania and Latvia
Total Investment	€ 2 million
Parts & Accessories Handled	Outgoing lines: approximately 6.300 orderlines/day
Number of Delivery Points (Retailers)	87
Employees	40 (excl. Contingency, interns, contractors)
Launch of operations	Sep-04
Warehouse surface	8.496 m ²

Toyota Parts Centre Portugal (TPCPT)

Location	Avenida Vasco da Gama 1410 - 4431 956 Vila Nova de Gaia (Portugal)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in Portugal and Spain
Total Investment	€ 1.3 million
Parts & Accessories Handled	Outgoing lines approximately 4.400 orderlines/day
Number of Delivery Points (Retailers)	52
Employees	26 (excl. Contingency, interns, contractors)
Launch of operations	May-05
Warehouse surface	10.391 m ²

Toyota Logistics Services Czech (TLSCZ)

Location	Prumyslová zóna Ovcáry, 280 02 Kolin (Czech Republic)
Function	Provides Just-in-Time parts supply to Toyota and Lexus delivery points located in the Czech Republic and part of Germany
Total Investment	€ 15.2 million
2019 Vehicle Movement	98,519
Number of Delivery Points (Retailers)	464
Employees	61(excl. Contingency, interns, contractors)
Launch of operations	Jul-07
Warehouse surface	11.689 m ²

Derby Logistics Centre (UK)

Location	Burnaston – Derbyshire DE1 9TA (UK)	
Function	Receive UK produced Corolla Hatchback and Touring Sport passenger cars and transport them to ports of export or to destination country. Receipt and transportation to UK NMSC of France built Yaris & Proace and Czech built AYGO. Central stock and enhancement activity of UK built vehicles destined for Norway and Denmark.	
2019 Vehicle Movement	Receipts: TMUK - 148,105 Export - 133,198	Dispatches: Imports – 75,500 Domestic - 93,646
Number of Delivery Points (Retailers)	364	
Total Investment	€9.3 million	
Employees	4 (excl. Contingency, interns, contractors)	
Completion	Dec-92	
Yard Space	Derby : 133,000m ²	

Toyota Logistics Services Sweden AB Malmö - Nordic Hub

Location	Lodgatan 26, 21124 Malmö (Sweden)
Function	Nordic distribution of Toyota & Lexus vehicles, Transshipment of vehicles for Russia and PDI/PPO processing
Total Investment	€1.57 million
2019 Vehicle Movement	Total: 134,637 units Preparation and retailer delivery Sweden: 26,619 Preparation and retailer delivery Denmark: 20,946 Preparation and retailer delivery Norway: 12,262 Transshipment of vehicles to Finland: 17,949 Transshipment of vehicles to Baltic: 14,871 Transshipment of vehicles to Russia: 41,799 Transshipment of vehicles to NATO Germany : 191 Transport modes: vessel, truck, rail
Number of Delivery Points (Retailers)	798
Employees	5 (excl. Contingency, interns, contractors)
Site Completion	Phase 1: December, 2002 (160,000 m ²) Phase 2: July, 2003 (60,000 m ²) Phase 3: December, 2004 (new quay walls)
Begin Operations	Phase 1: February, 2003 Phase 2: October, 2003 Phase 3: December, 2004
Total Site Area	255,000 m ²
Parking Area	245,000 m ² for maximum 11,500 vehicles
Building Area	3,600 m ²

Toyota Logistics Services España S.L. Sagunto

Location	Muelle Sur, s/n, Puerto De Sagunto 46520 - Valencia (Spain)
Function	Distribution of Toyota & Lexus vehicles to Spain, Transfer of vehicles to Gibraltar and Portugal, PDI/PPO processing
Total Investment	€9.6 million
2019 Vehicle Movement	Total arrivals: 97 357 Preparation and retailer delivery to Spain: 84 939 Transfer of vehicles to Gibraltar: 5036 Transfer of vehicles to Portugal: 3883 Transport mode: truck
Number of Delivery Points (Retailers)	99
Employees	1 (excl. Contingency, interns, contractors)
Site Completion	Mar-08
Begin Operations	Apr-08
Total Site Area	190,175 m ²
Parking Area	for maximum 8,700 vehicles
Building Area	4,500 m ²

Toyota Logistics Services, Turkey LTD (TLST) Adapazari Vehicle Hub

Location	P.K.161 Adapazare, Nehir Kenp, 54000 Sakarya (Turkey)
Function	- Manages the safe and efficient distribution and enhancement of Turkish production of Toyota vehicles from receipt at factory line-off to delivery to different countries in and out of Europe, follows the documentation, - Monitors and supervises the operations at remote sites – Koper, Piraeus, Tbilisi, Novorossiysk
2019 Vehicle Movement	251.285
Number of Delivery Points (Retailers)	59
Employees	3 (excl. Contingency, interns, contractors)
Launch of operations	Jan-02
Yard Space	Total parking and trucking area of 38,920 m ² in Adapazari

Toyota Logistics Services France S.A.S. (TLSFR) Valenciennes Vehicle Hub

Location	Parc d'Activités de la Vallée de l'Escaut-Sud, BP1, 59264 Onnaing (Valenciennes area, Nord Pas de Calais Region) (France)
Function	Pan-European distribution of Toyota vehicles, PDI / PPO processing
Total Investment	€15 million

2019 Vehicle Movement	Distribution of TMMF Yaris : 215,042 produced by TMMF Inspection of Pro-Ace in PSA Sevelnord plant: 31,582 veh Preparation and retailer delivery for France of all Toyota & Lexus: 120,590 vehicles Preparation and retailer delivery for Germany of Yaris and Proace: 26,589 vehicles
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Number of Delivery Points (Retailers)	651
Employees	7 (excl. Contingency, interns, contractors)
Site Completion	Sep-00
Begin Operations	Jan-01
Total Site Area	352,000 m ²
Parking Area	275,000 m ² currently paved (capacity of 12,660 vehicles)
Building Area	2,700 m ² of workshop and 900 m ² of office

Zeebrugge Vehicle Centre

Location	Aziestraat 2 Kaainummer 523 - 524 8380 Zeebrugge Belgium
Function	Pan-European distribution of Toyota and Lexus vehicles
Total Investment	€14 million

2019 Vehicle Movement	Preparation and retailer delivery Germany : 51442 Preparation and retailer delivery Belgium & Luxemburg : 17221 Preparation and retailer delivery Netherlands : 25220 Preparation and retailer delivery Norway: 9172 Transit to France : 58788 Export of TMMF Yaris by vessel : 83638 Export of PSA Proace by vessel : 12113 Export TPCA AYGO by vessel : 21829 Export Supra by vessel:11698 Transshipment (TMMT + CBU + TH + TSAM + US) by vessel : 54730 Transit by rail & truck : 58849 Transport modes : vessel, truck, rail
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Number of Delivery Points (Retailers)	676
Employees	6 (excl. Contingency, interns, contractors)
Site Completion	Phase 1 : September 1, 2000 Phase 2 : October 1, 2002
Began Operations	Phase 1 : January, 2001 Phase 2 : January, 2003
Total Site Area	460,000 m ²
Parking Area	420,000 m ² for maximum 18,000 vehicles
Building Area	2,450 m ² for workshop. 700 m ² for office, meeting rooms, canteen, locker rooms, etc

Annexes 22 - 26

Entretiens Semi-directifs

Jan Hermans / Human Resources Manager, Toyota Motor Europe -
Evere, 27 Février 2019

Sophie Glémet / Manager of Governmental & Corporate Affairs, bureau
de Paris, Toyota Motor Europe - Paris, 23 Juillet 2019

Jean-Yves Jault / Director of Communication, External and
Environmental Affairs, Toyota Motor Europe – Bruxelles, 14 Mai 2019

Mark Mildon / Senior Manager Corporate Communications, Toyota
Motor Europe - Bruxelles, 14 Mai 2019

Monika Wojcik-Kozika / Human Resources Manager of Organization &
People Development , Toyota Motor Europe - Bruxelles, 21 Mai 2019

The Toyota logo is displayed in a large, bold, red, sans-serif font, centered at the bottom of the page.

Annexe 22

Jan Hermans

Human Resources Manager

Toyota Motor Europe

Evere (Belgique), 27 Février 2019 – Temps 27:00

LCR

Qui êtes-vous et comment vous en êtes arrivés à Toyota Motor Europe ?

JH

Je suis Jan Hermans, je suis belge et je travaille actuellement au siège européen de Toyota (Toyota Motor Europe) à Evere, où je suis responsable des ressources humaines de la division Lexus Europe, Toyota Parts & Accessories & Toyota Parts & Vehicle Logistics en Europe. Travaillant dans une entreprise japonaise, j'ai une connaissance approfondie des dernières politiques et processus RH de pointe, y compris la gestion des compétences et des performances. Dans mon travail, je me concentre principalement sur le développement organisationnel et humain. J'ai également une grande expérience de la gestion, de l'encadrement et du mentorat de membres individuels et d'équipes, des négociations CCT avec les syndicats, du recrutement, de la rémunération et des avantages sociaux, ainsi que de la planification et de la formation de la main-d'œuvre. Je suis formateur certifié dans le cadre du programme de formation de l'Institut Toyota (Toyota Motor Corporation) au Japon ainsi que du programme Toyota's Management Development Program.

Je suis arrivé en 2004 à Toyota Holding qui devait être le lien entre le business development et le département des ressources humaines. A cette époque, on avait un dépassement de staff en RH de 100 à 180 personnes, tous étant bien expérimentés (employee relations, payroll, organizational development, training, etc.) et donc compétents dans tous les départements qui sont dans une entreprise de cette envergure. Mais il y avait un grand vide entre le business et le département RH. Je suis venu ici en 2004 et j'ai été responsable pour les ressources humaines généraliste d'abord du holding (Toyota Motor Europe 2001), société où étaient les dirigeants japonais qui venaient régulièrement ici et puis mes responsabilités se sont étendues ce qu'on appelait le Customer Service Group, ce qui est aujourd'hui appelé Value Chain/Toyota Parts Center Europe (TPCE), c'est-à-dire le département des pièces détachées, leur logistique, et la logistique des véhicules, qui dernièrement été étendu au sein

de la division Lexus, ce qui permet de couvrir environ 28 pays d'Europe. Toyota Parts Center Europe ne couvre pas que les pays de la zone économique européenne mais également des pays comme Malte, Chypre, la Russie, l'Ukraine, le Kazakhstan, les pays de l'Est. Actuellement, je suis responsable de toute la partie "Value Chain" avec mon collègue qui a la charge de la partie Vente & Marketing.

LCR

Êtes-vous rattaché hiérarchiquement à une division ou à un département au sein de Toyota Motor Europe ou travaillez-vous de façon indépendante ?

JH

Je suis rattaché à la division *Talent Management* en Ressources Humaines (RH). C'est la division qui est responsable pour le développement de tous les employés et plus spécifiquement le développement des managers et de leaders dans les ventes (NMSCs) et dans les usines (EMCs) et ce dans toute l'Europe. Nous avons la charge de tout ce qui est aux ressources humaines. Je suis responsable d'une équipe de 6 personnes (belge, polonais, argentin, roumain et trinitadien) qui gère toutes les questions RH pour toutes les NMSCs et EMCs en Belgique. Mais nous travaillons aussi avec des départements RH dépendant des autres NMSCs et EMCS dans les pays où nous sommes implantés

LCR

Quels sont les défis, défis et les projets sur lesquels vous travaillez actuellement ?

JH

Le défi le plus important aujourd'hui pour nous, c'est de supporter le business (activité) dans le processus de transformation d'une entreprise automobile vers une entreprise de mobilité (mobility society), c'est-à-dire d'un modèle traditionnel d'une entreprise automobile, qui produit des véhicules automobiles vers un monde ou un environnement où on ne produit plus de véhicules mais on vend de la "mobilité".

LCR

Donc, en rapport à ce défi d'être une "mobility society", ce qui transparaît dans la vision du groupe Toyota Motor Corporation, quelles sont les initiatives, les processus, les pratiques que vous mettez en place pour comprendre et répondre à ces enjeux de mobilité ?

JH

Nous avons un système japonais qui s'appelle "Hoshin Kanri" dont la signification se rapproche du mot "direction". Le Hoshin kanri traduit la vision de la société. On commence avec une vision globale mise en place par la maison-mère Toyota. Cette vision se trouve sur le site-web corporate. Et de cette vision globale, découlera une vision dans toutes les régions où Toyota est implantée et ces régions auront une mission locale. Nous connaissons donc la vision globale et la mission locale ; et de ces deux-là, la région fixe des priorités ou des objectifs annuels. Donc tous les objectifs annuels seront "cascadés", dans l'entreprise, dans tous les départements, tous les divisions afin qu'ils travaillent ensemble pour réaliser cette mission locale et cette vision globale. Plus bas la vision est cascadée, plus détaillée les objectifs deviendront.

LCR

Avez-vous des documents que vous mettez en place pour suivre comment le travail se fait ? Sont-ils accessibles ou plutôt exclusifs ?

JH

Ce sont des documents qui sont accessibles pour tout le monde dans l'équipe. Ce sont des documents internes qui permettent à tous les membres de l'équipe de préparer les objectifs dans un seul document qui est situé ou stocké sur un Intranet. Travailler sur le Hoshin Kanri est un effort d'équipe, et non un effort du dirigeant ou du manager.

LCR

Les informations corporate parlent de « Code of Conduct », de « Guiding Principles » comme des éléments qui permettent d'asseoir l'ensemble des employés sur une seule base. Existe-il un code adapté à la région européenne ?

JH

Nous possédons un code de conduite régional. Habituellement, les nouveaux employés de Toyota Motor Europe reçoivent une formation sur "le code of conduct". C'est une collection de règles et que tout le monde doit suivre notamment dans la relation avec des fournisseurs, des clients, avec les autorités locales. Dans notre équipe, nous avons une communication ouverte et transparente. Le manager de l'équipe comme on dit en anglais « *walks the talk* »: Il fait ce qu'il dit, et il dit ce qu'il fait. Tout le monde suit les règles parce que nous travaillons ici à Bruxelles avec 63 nationalités. Donc il y a beaucoup de cultures qui se rassemblent ici et chaque culture a ses propres règles. Donc on se doit de respecter toutes les différences

culturelles au sein de l'organisation. C'est très diversifié. De plus les nationalités ne sont pas seulement européennes. Nous avons aussi des collègues qui sont américains de Nord comme du Sud.

Tous les membres de l'équipe contribuent en partie à la construction de la vision de l'organisation; chacun selon sa spécialité ou selon son projet. Nous avons des interactions journalières et c'est très important.

LCR

Êtes-vous en tant que manager, en contact avec des réseaux d'entreprises, avec d'autres managers d'autres organisations automobiles ou japonaises?

JH

Pas beaucoup aujourd'hui. Il m'arrive de discuter avec d'autres contacts une fois par an. Une fois par an, nous avons des conférences avec d'autres organisations automobiles où nous partageons les "best practices" et où nous essayons de résoudre des problèmes communs. Il arrive parfois que ces organisations aient déjà développé des solutions et c'est comme ça qu'on travaille ensemble. Ces conférences se passent en Europe

LCR

Vous avez entendu parler de l'ALE entre le Japon et l'Union européenne qui a été signée en 2012 et qui en cours de ratification. Alors, il y'a-t-il un intérêt pour TME sur cet accord de partenariat économique ?

JH

L'accord n'a pas d'effet direct dans notre quotidien mais je pense bien que c'est important car le Japon n'étant pas membre de l'Union européenne fait que beaucoup de nos véhicules soient quand même fabriqués au Japon, nonobstant le fait qu'on ait des usines des usines en Europe. Nous restons dépendants du Japon pour quelques modèles notamment les modèles Lexus. Après il faut avouer que la marque Lexus n'a pas le même poids que Toyota, c'est une gamme de niche. Donc je ne pense pas qu'on a des plans afin d'ouvrir des usines pour Lexus mais ça permettra d'exporter ou d'importer certains modèles comme Land Cruiser. Et donc cet accord pourrait ouvrir des possibilités, comme des usines aux normes européennes et ainsi améliorer la relation entre le Japon et l'Europe.

Annexe 23

Sophie Glémet

Manager of Governmental & Corporate Affairs, bureau de Paris

Toyota Motor Europe

Paris, 20 Mars 2019 – Temps 49:22

LCR

Qui êtes-vous et comment vous en êtes arrivés à Toyota Motor Europe ?

SG

Entendu, mon nom est Sophie Glémet et j'ai toujours travaillé chez Toyota. En termes de parcours universitaire, j'ai une Maîtrise en Sciences économiques avec un parcours "Politique Industrielle", car l'industrie m'a toujours intéressé pendant toutes mes études. Et lors de la dernière année de mes études, j'ai travaillé avec un cabinet de communication institutionnelle sur une étude sur le raffinage en Europe et j'ai donc fait un stage d'un an à l'IFP (Institut français du pétrole). Là aussi j'ai continué à affiner un petit peu mon appétence l'industriel techno sachant que je ne suis pas ingénieur mais l'économie mène à tout. En parallèle j'ai travaillé dans une agence de communication institutionnelle où j'ai pu écrire des communiqués de presse au kilomètre. C'était un petit peu sa mission, quel que soit l'entreprise qui s'en servait. J'ai aussi un petit peu d'événementiel au sein de cette agence en organisant des manifestations institutionnelles notamment avec des prix Nobel, mais liés à des secteurs plus technologiques. Et donc la complémentarité entre ces deux aspects m'a plu. Donc je suis rentré à Toyota en 1992 quand j'ai vu une annonce dans laquelle ils cherchaient dans un bureau de liaison, un assistant pour travailler avec le japonais local. Je me suis dit "pourquoi pas", je suis allé voir et en me disant que je souhaite rester là deux trois ans. Ça fait 27 ans que j'y suis.

J'ai donc intégré Toyota Motor Corporation puisque c'était un bureau de liaison du constructeur mondial, chez Toyota France; Toyota France étant l'importateur et le distributeur des produits Toyota & Lexus en France. C'était un tout petit bureau de liaison mais qui était là pour faire de la veille, pour éventuellement sentir d'éventuels partenariats pour le groupe en France et qui était un distributeur dont le capital n'était pas de 100% Toyota. Il l'est devenu par la suite. Et puis surtout en 1992, le Ministère de l'Industrie avait imposé un quota d'importation de véhicules japonais de 3 % en Europe toutes marques japonaises confondues. Donc il n'était

pas du tout question d'avoir des unités de production sur le continent européen. Donc en gros, pour la France, durant les mois d'octobre et de novembre 1992, atteignait assez rapidement leur quota de véhicules et de facto la force des ventes s'arrêtait. Et c'était très profitable pour TMC car ils vendaient surtout plus de modèles 4x4 (Fleet) que des petites voitures même si nous sommes des constructeurs généralistes. C'est pour ça qu'on nous connaît davantage. Et puis en 1999, cette logique de quota a été arrêtée. Il a été possible de produire localement à partir de 2000.

Ensuite, depuis 1999, j'ai alterné entre le bureau de liaison et le bureau de Tokyo. Puis 5 ans plus tard, je me suis dit: "Rien ne bouge. Qu'est-ce que je fais?" C'est à ce moment où mon supérieur japonais me fait part d'un projet d'implantation industrielle en France. Donc c'est vrai que ça a changé ma façon de voir les choses. Et puis, nous avons monté un bureau de liaison pour Toyota Motor Europe dans lequel je travaille actuellement; qui s'occupe des affaires corporate, des affaires gouvernementales et affaires technologiques. Ensuite je suis allé chez Toyota France, le distributeur, en charge des relations médias et de la Responsabilité Sociétale de l'Entreprise (RSE) et ensuite je suis revenu des années plus tard, il y a un an et demi de cela dans ce bureau de liaison que je dirige aujourd'hui

Toyota est mieux connu aux Etats-Unis et moins en Europe, parce que nous possédons 4% de parts de marché. Alors, aujourd'hui 4.8% en France mais 4% de parts de marché en Europe, dû à ces quotas d'importation. On n'a pas pu, à ce moment, structurer notre force de vente comme d'autres constructeurs européens ont pu le faire. Même chose pour la logistique, dans le sens où nous sommes arrivés, dans les années 2000 avec des hubs logistiques et des réseaux logistiques de distribution, déjà construits; et c'était assez embryonnaire. C'est très paradoxal car nous avons mis en place des réseaux logistiques modernes mais avec des volumes qui sont quand même assez restreints. Toyota France, c'est à peu près 100.000 véhicules neufs/an par rapport aux constructeurs français, qui occupent à peu près 60% de part de marché en France des véhicules neufs; ce qui est quand même assez inédit. Vous avez le même cas de figure au Japon et en Allemagne, où des constructeurs locaux occupent ce segment de part de marché; ce qui était assez rare. Donc l'Europe est vraiment un environnement concurrentiel pour les marques japonaises.

LCR

Êtes-vous rattaché à une division ou à un département au sein de Toyota Motor Europe ou travaillez-vous de façon indépendante? Et est-ce que vous travaillez avec les autres

départements, dans quel contexte? Quels sont les défis, défis et les projets sur lesquels vous travaillez actuellement ?

SG

En fait au sein de Toyota France il y a encore des activités "affaires relations extérieures". Si je peux vous donner un exemple: Quand on travaille sur les bonus écologiques sur les véhicules au sein de la division Communication, on organise des rendez-vous avec eux, car ils sont impactés par ça aussi et devront ensuite informer le réseau de concessionnaires. En France, il y a également un site de production de Toyota (Toyota Motor Manufacturing France - TMMF), à Valenciennes (Onnaing); un centre de design européen du côté de Nice (Toyota Europe Design Development - ED2); deux plateformes logistiques dont une du côté de Valenciennes qui accueille des Yaris et d'autres véhicules Toyota qui seront ensuite distribués; et une plateforme logistique de pièces qui se trouve en Ardèche; et Toyota France (NMSC) qui se trouve à Vaucresson qui distribue les véhicules Toyota et Lexus.

Les deux grosses entités en France sont bien sûr Toyota France et Toyota Motor Manufacturing France. Mon bureau est en charge des affaires publiques et institutionnelles, des relations avec le gouvernement: Quand on va monter en puissance à Valenciennes, on travaille sur les dossiers évidemment de développement; pendant le #DieselGate de Volkswagen, nous avons mis en place avec Toyota la commission Diesel; c'est notre bureau qui l'a mis en place avec nos ingénieurs qui sont de TMC également; quand on a des partenariats institutionnels à mettre en place, on intervient; la promotion de la technologie hybride c'est notre objectif et notre mission. Actuellement nous venons de signer un partenariat avec l'Ecole Polytechnique pour faire des études et montrer le fort potentiel de la technologie "full hybrid" de Toyota Prius: Ils ont testé nos véhicules pendant dix jours et ont fait un rapport que l'on utilise pour montrer "les mode zéro émission" lors des différentes phases d'utilisation des véhicules. Donc vous voyez, on se partage les actions avec nos collègues européens. En revanche je ne suis plus en charge de la presse économique.

L'objectif de ce bureau de liaison, à l'époque puisqu'il n'y avait rien, était donc de faire venir l'investissement de Toyota en France. Donc notre cour d'école c'est la France pour faire en sorte de créer un environnement favorable aux investissements et aux activités de Toyota en France qu'ils soient industriels, commerciaux, technologiques, etc. Mon bureau de liaison a tout fait pour la France: On a travaillé sur l'implantation industrielle de Valenciennes en 1998, le site était géré à l'époque par Toyota Motor Corporation (TMC) puisque Toyota Motor Europe, notre siège à Bruxelles n'était pas encore opérationnel et n'avait pas toutes les responsabilités qu'elle a aujourd'hui. On a délocalisé aussi le centre de design (ED2) qui se trouvait à

Zaventem en banlieue de Bruxelles, vers Nice parce qu'on a pensé avec TMC que c'était plus intéressant de le rapprocher du centre plus latin de l'Europe et pour produire des petits véhicules éventuellement. C'est un centre qui fait du "concept-car", du design extérieur et intérieur. Nous avons quatre centres de design dans le monde comme celui-ci: deux au Japon, un en Californie et un à Sofia-Antipolis (Nice).

Il faut savoir qu'au moment du développement de chaque véhicule ces quatre centres entrent en compétition. Mais on peut très bien développer à Sophia-Antipolis un véhicule qui sera vendu aux Etats-Unis. Le projet de délocalisation de ED2 vers Nice nous a permis aussi de développer tous nos contacts politiques. A l'époque, TMMF de Valenciennes a été le plus gros chantier d'implantation européen. A partir de là, en étant expatrié au Japon, c'était très facile de travailler avec eux. Quand je suis arrivé au Japon, c'était l'époque où le gouvernement français était en 3ème cohabitation (en 1997, avec Jacques Chirac comme Président et Lionel Jospin en Premier ministre) et les investissements étrangers notamment japonais n'étaient pas les bienvenus à cause du blocus des magnétoscopes avec Edith Cresson en 1982, qui avait traité les japonais de "fourmis". Donc les relations entre le Japon et la France n'étaient pas bonnes. Donc on a eu une chance incroyable d'avoir un ambassadeur délégué aux investissements étrangers en France du nom de Jean-Daniel Tordjman, en 1992. Il a été à l'initiative de "l'Année de la France au Japon" et simultanément "l'Année du Japon en France" encouragé grâce à M. Chirac qui a fait du Japon aussi une de ses destinations - phares.

En fait nous sommes une petite équipe flexible et réactive, ce qui est agréable dans un grand groupe avec les moyens d'un grand groupe. En revanche nous travaillons et nous devons travailler à coordonner justement toutes les activités des entités qui existent par elles-mêmes comme par exemple sur le site de production TMMF produit les modèles Yaris, le distributeur Toyota France, le centre de design européen ED2 et les deux plateformes logistiques. Donc en fait toutes ces entités là on a travaillé à leur implantation industrielle. On les a fait venir et ensuite chaque entité a elle-même créé sa propre division communication voire affaires publiques: Par exemple Valenciennes a des relations locales avec les élus locaux. Donc oui bien sûr qu'on travaille avec toutes ces entités là et on se doit de coordonner notre message pour ne parler que d'une voix bien sûr et c'est notre mission.

Pour ce faire, on organise trois fois par an, trois rendez-vous avec toutes ces entités là, dans notre bureau parisien où on convie les présidents de chaque entité et pas uniquement les responsables des affaires publiques ou de la communication corporate. Certaines de ces entités ne disposent pas de poste de représentant en affaires gouvernementales ou de communication corporate. Donc on se réunit trois fois par an et on débat de sujets liés aux

affaires publiques ou gouvernementales où chacun fait le tour de son sujet. On s'aligne sur ce que demande le groupe sachant que notre bureau de Paris dépend entièrement du siège européen (Toyota Motor Europe): Il en est de même pour nos deux autres bureaux en Allemagne et en Angleterre. Les parties prenantes avec lesquelles nous travaillons sont des instances gouvernementales, des institutions et même d'autres entreprises selon les thématiques.

Chaque année, nous définissons nos priorités, dans un document que l'on appelle "Hoshin" qui est une feuille de route que nous partageons tous avec des objectifs à court terme (c'est à dire annuel), moyen terme et puis long terme. Par exemple le document que je dois remplir vient s'inscrire dans le Hoshin de Toyota Motor Europe. Vous y retrouvez un volet marketing, un volet vente, un volet affaires publiques et gouvernementales, un volet Ressources Humaines où chaque département et division de TME met son input et cette feuille de route va nous servir ensuite à décliner nos objectifs personnels et les objectifs du bureau et des collaborateurs. Historiquement, puisque nous nous sommes manufacturiers, ce document était fait avec plein de process - Je pense que c'est pareil dans d'autres groupes japonais - rationnels. Ces documents-là étaient faits à l'origine dans l'usine pour comprendre la stratégie à moyen et long terme de l'usine et de la production et voir à côté toutes les dépenses qui y étaient liées. Bien évidemment il a beaucoup évolué.

Donc nous, au sein du bureau de Paris, nous travaillons avec les entités gouvernementales directement, car nos terrains de prédilection sont les ministères de l'Industrie et de l'Economie pour notre implantation industrielle, le ministère de l'Ecologie pour nos nouvelles technologies, et le ministère du Travail pour les questions liées à l'emploi ou la formation. A côté de cela, nous avons des liens aussi directs avec le cabinet du Premier ministre voire avec le cabinet de l'Elysée, et dans ces cas-là, nous pouvons intervenir dans nos exécutifs mondiaux. Nous travaillons également avec le Parlement (Assemblée nationale ou Sénat) en fonction des thématiques: Pour prendre l'exemple sur la LOM (Loi d'orientation des mobilités - 24/12/2019), on nous a demandé, voir auditionné pour donner notre avis sur la définition du véhicule dans les villes (VTB), la définition d'accès dans les villes et la définition des critères qui les certificats de qualité. En général nous sommes convoqués et invités à nous exprimer, au même titre que les constructeurs français - ce qui est assez drôle - parce que nous produisons en France, ce qui nous offre beaucoup de portes. Nous ne travaillons avec aucun consultant, nous sommes directement impliqués, nous ne faisons pas de lobby, nous sommes un peu plus laborieux sur des sujets, nous informons les conseillers industrie qui sont nos interlocuteurs réguliers que ce soit pour les bonnes nouvelles ou les mauvaises nouvelles

Le but étant toujours d'être le plus crédible possible. Ors lorsque nous travaillions avec un cabinet de consultants, il y'avait toujours un interdit. Nous l'avons fait dans le passé notamment sur l'implantation industrielle de Toyota France parce que c'était gigantesque comme projet. Et puis il fallait vraiment des personnes qui connaissent le tissu français. Donc ça nous a beaucoup aidés. Moi j'ai beaucoup appris aussi. Mais maintenant on évite de travailler avec des intermédiaires.

Nous travaillons également avec les entreprises: Dans le cadre de la promotion de la société de l'hydrogène, que ce soit au Japon ou dans le monde donc en Europe et en France également, nous travaillons et contactons directement les sociétés productrices d'hydrogène tel qu'Air Liquide, Engie, Total et toutes ces entreprises qui ont un ancrage français sur la question. Cela fait partie de nos "affaires publiques". Nous travaillons dans une dimension nationale. Notre mission, en résumé, est de créer un environnement favorable à toutes nos activités industrielles, commerciales, de design de Toyota en France. Deuxièmement, notre position au sein de Paris est d'éviter toute crise d'entreprise: Si jamais, il y avait un souci à Valenciennes ou autre, tout de suite nous informons le gouvernement, dans le but d'éviter que l'image de Toyota Motor Corporation soit abimée. Troisièmement, notre position au sein de Paris est de créer de la richesse dans le pays avec les locaux; C'est donc la création d'emplois, la création d'investissements à très long terme, la création de partenariats avec des entreprises sur des sujets technologiques.

LCR

En parlant d'environnement, Toyota Motor Corporation met en avant ce qu'ils appellent des principes. L'un de ces principes est de créer un environnement de travail vivant et harmonieux (Creating a Harmonious and Lively Work Environment - Toyota Principles). Est-ce que et comment vous l'appliquez dans votre quotidien?

SG

Il faut savoir que ces principes font partie du système de production de Toyota (TPS). Dans ce TPS, il y a deux grands piliers que sont "l'amélioration continue" qu'on appelle "Kaizen" parce nous pensons qu'il ne faut jamais s'arrêter à ce qu'on est dans la vie. C'est une forme de discipline. Le second grand pilier est le respect des personnes, c'est-à-dire, le respect de nos clients puisque le client est au centre de tout ce qu'on crée, il est en haut de la pyramide; le respect de collaborateurs bien évidemment. Finalement, lorsqu'on parle d'environnement, nous parlons d'environnement sociétal, qu'il soit social, économique, vert. Et nous avons, à côté de ça, une charte environnementale à horizon 2050 que l'on décline aussi bien en termes de production de véhicules tout au long de leurs cycles de vie, ou en termes de nos opérations

quotidiennes. Tous les Toyota partagent cet objectif là avec à chaque fois des objectifs à mi-chemin. Et c'est peut-être ce qui nous caractérise par rapport à d'autres constructeurs.

Cette charte environnementale est définie au plus haut, c'est à dire au niveau du siège global. Toutes les grandes lignes y sont décidées et c'est la même chose pour la recherche et développement générale qui est vraiment très liée au siège, puisque c'est le bras armé de l'entreprise. Même si nous possédons des centres de recherche et développement en Europe; cette politique ainsi toute la politique du système de production appartient vraiment au siège global et est ensuite déclinée par région (Etats-Unis, Amérique du Nord et du Sud, Europe , Afrique, Asie hors , la Corée et le Japon)

LCR

Vous avez entendu parler de l'ALE entre le Japon et l'Union Européenne qui a été signée en 2012 et qui est en cours de ratification. Existe-t-il un intérêt pour TME sur cet accord de partenariat économique?

SG

Oui, bien sûr puisque nous, nous sommes Toyota Motor Europe à Paris. Notre division-mère qui est le "European Governmental Affairs of Toyota Motor Europe" à Bruxelles est entièrement dédié à ce sujet-là. Nous, en tant que bureau de Paris, devons reporter à notre entité européenne. On a beaucoup de reporting à faire dans les entreprises japonaises, c'est comme ça. De temps en temps, nous reportons aussi au Japon quand on est questionné très régulièrement - par des rapports français qu'on envoie à tout le monde - sur le contexte politique, économique, social, car ils ont besoin de savoir et prendre la température. Certes, ils ont des consultants qui le font, mais ils demandent aux entités locales pour comprendre. Par exemple, en ce qui concerne "la crise des gilets jaunes" ils ont besoin de comprendre du point de vue des Français. Au sein de nos trois bureaux (Londres, Paris et Berlin), Bruxelles nous demande de faire beaucoup de veille institutionnelle et nous avons aussi des missions qui sont de développer et d'encourager les technologies qu'elles soient 100% hybride bientôt pure électrique ou hydrogène. Donc on a tous ces missions-là. Personnellement, j'en ai une en plus parce que nous avons l'usine en France, donc c'est vraiment cet outil de reporting là qu'on va utiliser en matière d'affaires gouvernementales.

Mais en plus, entre ces trois pays, on a chacun une mission européenne: Le bureau de Londres lui doit gérer les relations et toutes les informations liées au Brexit; le bureau de Berlin, lui va gérer tout ce qui est technologie hydrogène en matière de reporting - même si nous en faisons en France - et les centralisent pour le compte de Toyota Motor Europe; et nous à Paris, Notre mission européenne est de centraliser tout ce qui est affaires gouvernementales

européennes en matière de "no emissions zones" et de restrictions d'accès dans les villes. Ce sont des nouvelles les nouvelles problématiques sont arrivées et qui viennent s'ajouter aux réglementations en vigueur. Pour cela, on nous donne des moyens: J'assiste régulièrement aux réunions du comité automobile européen qui s'appelle l'ACEA, là on a tous les constructeurs représentés avec des associations de villes etc. Et ma mission dans ce cadre est d'informer, de mettre en place une base de données pour tous les Toyota en Europe et suivre l'évolution des grands pays européens en matière de restriction d'accès aux technologies. En même temps, je fais un reporting régulier sur l'impact du Brexit en France à mes collègues de Londres et voilà donc on s'entraide tous, et notre collaboration est matricielle. Mais chacun a un pôle de responsabilité en plus. Donc trois fois par an aussi, nous nous rencontrons tous les trois bureaux et le siège européen pour discuter de tous ces sujets-là.

Sur l'accord Europe-Japon, comme c'était assez chaud à un moment donné, nous avons fait du reporting ou nous arrangeons des rendez-vous auprès du ministère avec nos responsables européens. Cela reste une thématique sur laquelle sommes moins en contact direct, même si nous suivons le dossier de près. Nous avons des entités de production (EMCs) en Europe , mais également des entités de vente (NMSCs) qui vont importer 25% de leurs véhicules du Japon, puisque 75% des véhicules sont produits en Europe. Sur la question du Brexit, qui est un exemple concret; nous produisons des Yaris à Valenciennes, et elle est exporté à 85% en Europe dont en Angleterre. Lors de la grève des douaniers à Calais en 2019, nous avons eu un gros souci de blocage de nos voitures vers l'Angleterre. Il en est de même pour certaines pièces qui sont donc pas produites par nous, mais par les réseaux de d'équipementiers, qui se trouvent en Angleterre, et qui se sont retrouvés bloqués dans le tunnel d'Eurostar. Donc là nos collègues de Toyota Angleterre nous disent: "Mais qu'est-ce-que c'est que ça? Informez-nous! Essayez de trouver un moyen de discuter avec les gouvernements pour savoir quand va se terminer cette grève? Quelle serait l'ampleur etc." Dans ces cas-là évidemment, et étant nous-même producteurs, nous sommes encore plus concernés.

LCR

Quels sont les modèles de voitures que Toyota Motor Europe produit?

SG

Sur les 9 sites de production qui commercialisent 75% de nos véhicules, nous avons plus de vingt-cinq modèles dont la AYGO qui est produite en coentreprise avec Peugeot (Toyota Peugeot Citroën Automobiles - TPCA) en République Tchèque, et le Pro Auris qui est un

utilitaire produit en coentreprise avec Peugeot à Sevelnord (Hordain) qui est un site de Peugeot.

LCR

Comment faites-vous pour travailler en collaboration avec vos concurrents?

SG

En fait, nous sommes l'un des seuls constructeurs à être encore indépendants comme le cas de Honda, ce qui ne nous empêche pas de faire des coentreprises sur des sujets et des productions précis. Il n'y a pas d'échange de capital ou de prises de position de capital. En revanche, chacun garde son expertise. Par exemple, dans le cadre de Sevelnord, nous travaillons avec un réseau d'équipementiers très riche dans le nord de la France et Peugeot PSA a de très bonnes relations et est très fort pour gérer ses équipementiers. Nous, à Toyota Motor Corporation, nous sommes très fort sur les systèmes de production (TPS). Donc en fait, nous n'intervenons chacun que sur nos compétences. C'est la même chose en République Tchèque avec Peugeot où là on a débuté ensemble cette coentreprise (TPCA) un peu plus significative, et dans laquelle Peugeot s'est vraiment occupé du réseau d'équipementiers local et nous de la production. Notre intervention apparaît si la création de cette coentreprise a été faite de A à Z ou si nous arrivons après.

Pour Sevelnord, nous sommes intervenus parce que notre chairman de TME, Didier Leroy, a été sollicitée par Peugeot pour venir donner un coup de main; sachant que ce qui nous intéresse, c'est aussi l'ancrage français (L'usine de Valenciennes est 99% opérée par des français et est dirigée par un Français. Il y a 99% de d'opérateurs français parce qu'on sait que la seule façon de produire localement c'est de donner la main aux locaux. Pour Peugeot, ce n'est pas pareil. C'est parce qu'on se connaissait depuis longtemps, et parce qu'entre constructeurs en général, les relations sont bonnes, et puis, parce qu'on avait quand même une réalisation qui avait interpellé tout le secteur automobile au travers de l'usine de Valenciennes qui a été une implantation assez remarquable. Donc nous avons été sollicités pour notre savoir-faire. Dans un premier temps, on leur a acheté des véhicules (30.000 unités) sur lesquels nous avons mis le logo Toyota dessus, en 2015. Et puis, petit à petit, l'objectif pour nous était de rentrer dans le système de production pour produire. Maintenant, nous sommes Peugeot, Citroën et Toyota, trois marques différentes qui produisent sur un châssis identique, trois véhicules identiques avec des changements au niveau esthétique.

LCR

Êtes-vous en contact avec d'autres entreprises japonaises qui exercent dans le secteur français ou européen?

SG

Non. Jamais, puisque chacun fait son truc, pour autant ça ne nous empêche pas de se rencontrer. Personnellement, je fais partie du conseil d'administration du Comité d'échanges franco-japonais (CEFJ). Donc on se réunit mais là c'est différent. C'est plus pour être une communauté. Parce qu'on se connaît entre entreprises japonaises en France et entreprises françaises au Japon, cette communauté est là pour encourager les échanges et pour encourager le business. Ce comité dépend de la Chambre de commerce et d'industrie franco-japonaise et on a quelques thématiques que l'on partage: L'année des Japonismes pour l'année dernière pour fêter les 160 ans d'amitié entre la France et Japon sous un angle plutôt culturel. C'était plus une initiative gérée par l'ambassade du Japon en France. Mais du fait que nous soyons des manufacturiers, nous n'échangeons pas des pratiques managériales. Et nos employés étant français, on a plus des problématiques d'entreprises françaises que d'autre choses.

Annexe 24

Jean-Yves Jault

Director of Communication, External and Environmental Affairs

Toyota Motor Europe

Brussels, May 14th, 2019 – Time 1:55:53

What is your academic background and How did you arrive at that position?

Jean-Yves Jault. I am French, born in Central France and I grew up there from a 100% French family. My grandparents were farmers and Christians and my dad worked at Peugeot for 30 years. So, obviously I was based in the automotive industry when I was growing up, and when I turned 18 years, I worked during Summer to make some pocket money, as many students, in a testing factory making parts in engine blocks for about four or five years. I studied first in Preparatory class in HEC Business School. And then I went to SciencesPo in Lyon where I studied Political Sciences, which I specialized in Media studies and Communication. So, I chose that, and I graduated 1993 and then I did an additional year at the University of Oregon (US) where I learned a lot about Journalism and Public Relations. Then after my military service, I moved with my wife to California, San Francisco and I started looking for a job.

My first was at New United Motor Manufacturing Inc. (NUMMI), a joint-venture factory between General Motors and Toyota. It was originally, a plant that was built by GM in 1962 and operated as a GM factory for many years, until it closed in 1978, laying off 5000-6000 people that were working there. The reason of the shutdown was because they were making unprofitable and large cars in a market on a post-oil crisis that shifted to more compact and small cars.

During that period, Toyota was looking to start manufacturing and operate outside Japan. They had already an operation in Brazil, but they wanted to manufacture in the US because they thought this was a promising market. They started contacting us, local automakers, to see if we wanted to collaborate with them in co-manufacturing vehicles in a joint venture. One reason of the joint venture was the ability to learn supply relations and supply sourcing. Another reason was about trade tensions at the time between US and Japan: There was a sort of anti-Japanese sentiment going in American society due to these trade tensions. Toyota thought that, having a US partner would be a good way to be more accepted and to have "slight open door" into setting up operations in America. They contacted Ford, and talked for a while, and then negotiations broke down because they couldn't agree on the type of car, they wanted to

make together. So, Toyota contacted General Motors in 1982, which agreed on collaborating and they decided to use that NUMMI factory as an operational point in 1984. And it was the first plant in North America 50% - 50% joint venture and a unique place, because that's where the application of the Toyota Production System in a non-Japanese working environment started for Toyota. The other interesting part is that, General Motors had to accept working with the Japanese, by allowing the UAW (United Auto Workers), a very strong union, to represent the workers at this factory. The deal was made under some conditions: One, Toyota cannot be part of the bargaining process that the UAW used, because it has a different production system. Two, Toyota's work philosophy is based on teamwork, collaboration between labor and management, and we have unique production methods different from the old days of making cars, especially in American context.

Regardless of the location on the line, and so on, there's basically two distinctions. One is production work and the other one is maintenance work. That work is regulated, based on the standardized worksheet. So, each workstation has a job. It's described step by step, times and so on. And it's optimized for efficiency and so on and so forth. And workers have a lot of responsibility in terms of ensuring quality they can stop the line by using a cord in the unknown cord etc., there's information that's very transparent and visible on the production status. And all that requires a different relationship between the supervisors and the members. And that requires a different kind of understanding with the Union as to how to deal with all kinds of things. Scheduling work, attendance is very critical, and so on and so forth. social relations, the HR organization, liberal representatives from the company are together with union representatives, and they always go together into the line to fight off. There's problem they discuss together and so there was huge effort to make very good teamwork and labor management relations positive living in this factory. And so, the contract that was going up the new contract was a unique content tract and it was the kind of template for how to operate labor management relations throughout the world in non-Japanese context. So that's the history of NUMMI. I mentioned that because this is kind of relevant for your topic, I think.

I joined that company much later after it hadn't existed and operated for many years. I joined in 1996. Basically, straight out of my studies, and my job was internal communication. So I was in charge of making employee newsletters, magazine, events and I was also in charge of community relations, so liaising with nonprofit organizations, or local, city and so on, to make sure that we were well implanted and well respected and accepted in the community around us. Then my job evolved: I started doing external communication as well like Media Relations PR for the plants because it was a joint venture, we had our own corporate functions, we did not depend on Toyota or GM, we were unique in that sense for independent and then I stayed

seven years there and after about five years, I did corporate planning as well: How to set up the objectives of the company and management's every year using the "Hoshin Kanri" process. I finished there as manager of General Affairs, Communication and Corporate planning and then I decided that for my own family reasons and a personal balance and happiness that I, I didn't want to live in the US anymore. I was kind of I had done it. I wanted to come back to Europe. So, my wife and I and my two kids, we moved back here. But I wanted to stay up Toyota because of the two companies in NUMMI, the President was always an Toyota person, the factory was run 100% like a Toyota factory; GM would have a couple of people in key positions: One was in finance and also Internal affairs. So, my boss was a GM guy and his boss was the President (a Toyota guy). GM was kind of interested in using it as a factory, making sure that it was economically interesting for them. So, the controller/finance head was a GM guy that was looking after the contract between the two companies on vehicle production, sourcing decisions, this kind of stuff. GM had coordinators, but they were more in learning position. So, they were there to learn the Toyota Production System from the inside. And Toyota was very willing to share that. It enabled GM to learn lean production basically, and to set up their own so called "GM Production System" and to train thousands of people that they would have either short assignments in NUMMI or one or two years or three years. Then, they use that as a platform to kind of instill lean into the GM organization globally. They set up a new factory in Brazil, which was basically based on the GM production system, and one factory in Russelsheim, Germany as well which was kind of a model for them. But the management and the ways of working was basically Toyota: All the training, we studied, Toyota business practices, problem solving, A3 reports and all that stuff. So, I was really kin on keeping myself anchored at Toyota and I asked if I could work in Europe, and I ended up here. That was in 2002.

At first, I did the corporate planning for the manufacturing and engineering headquarters. We used to have three companies here: one was the sales and marketing, which was set up a long time ago to support the sales, and then in 1999, we set up manufacturing headquarter because we only had one factory in Europe (UK) - with two plants, one vehicle plant and one unit plant. So, while we had only one company, one factory in one country, that the country was in direct relation with Japan, and then in 1999, we decided to open up a second factory in Europe, which was TMMF in Valenciennes, France, because we had now two factories and some processes needed to be "communized" (IT systems, purchasing, etc.). So, we created this headquarter to coordinate between the two factories and then later, we added factories in Poland in 2004-2005. We also entered into discussion with PSA to create a factory in Czech Republic as a joint venture which started operations around that time. Then we added another Polish factory later with Toyota industries. And then we took over a Turkish factory which wasn't

initially a CKD (Complete Knock Down) factory in 2002, 100% Toyota and we built a factory in Russia, in St. Petersburg. So TME coordinated all that growth of production in Europe and took over the R&D function which was originally part of the Sales and Marketing organization. They were doing homologation, simple R&D; then we started growing it as well*. So around capability here, we have another site, three kilometers from HQ in Zaventem, Belgium, where we handle Production, Engineering, Purchasing, R&D process. And later, 2005, we merged those headquarters into one, called Toyota Motor Europe, just for efficiency and simplification.

But at that time, I oversaw Manufacturing, Engineering, and Corporate Planning: I would coordinate the management meetings between the factory heads and headquarter functional officers (Control, Production, Engineering, IT, HR, Finance, etc.), then I moved to human resources. I created a department called "Organization Developments" in which we setup HR processes to manage our management and our team members (appraisal system for people's objectives every year, competency development systems, training promotion process, succession planning) for 7 years and when we merged the headquarters, we also merged this department with HR systems of these three sites. Then, there was some differences that we brought together, which was interesting culturally speaking, because sales people and manufacturing people are not the same: Sales organization was very local, very "Europeanized" in the way of handling benefits and pay and evaluations; while Manufacturing organization was more of a carryover from the "Toyota Way" in Japan: a bit more controlled, centralized, a bit more structured, maybe a bit more strict. So, we exercise ourselves on creating one goal out of the two interesting discussions.

Then in 2011, I moved back to PR and Communication function, this time for Toyota Motor Europe as a whole. So, my role was basically corporate communications: I have both internal communication for PME - meaning for the 2.500 members who work for headquarters - and external communication - anything that's not product communication: when we launch a new car, we have to appeal to the journalist who writes in automobile magazines and specialized magazines for people who want to buy a car. That's one side of communication. I was not in charge of that. I was in charge of everything else: If there's any questions from any business journalist or any media and interested party who wants to ask Toyota about itself or about our opinion on some industry trends or technology or whatever, then they contact us and we are basically the Press Office, managing their questions, preparing Q&A. When we announce something, when we launch something, when there's something happening; that is connected to our business, we must prepare ourselves so that we know what to answer. We can be reactive on responding to questions from any media, and we also prepare executives when they had interviews, and maintain good relations basically with these media. Then I went in

2017 to Japan for Toyota Motor Corporation (TMC) and I came back January 2019, where I was in Global Communication Department. I was handling Europe, Americas, Australia and New Zealand as the English-speaking side of TMC for developed markets and emerging markets like China. My role was to coordinate corporate communication topics with various regional headquarters like Europe North America, South America, Australia and New Zealand. I was also in charge of PR project for the Olympic partnership we signed in 2015, and for Toyota 2020.

Since I came back in TME, I took back my role in corporate communication, and it evolves by adding government relations: Government relations is basically a relationship with the European institutions (Parliament, Commission, Council) and also governmental relations on the pan-European basis with our various affiliates for their national government affairs and also industry relations: We are a member of ACEA, the European Association of Automotive Manufacturers. Our chairman who is also Executive Vice President of TMC, Didier Leroy, is our representative on the board of ACEA. He splits his time between Europe, Japan, and America, has a broad portfolio, a global basis. So, he's here about one week a month and we work with him on a set of topics.

As the Director in Communication, External Governmental and Environmental Affairs: What is your role within TME? What are the daily functions you lead in the European headquarters?

Regarding corporate communication that has been described earlier, my job has to do with how to earn a good reputation with a variety of stakeholders outside the company. I lead 21 people and I directly respond to Jacques Pieraets, Executive Vice President of TME in charge of Communication.

That means, we have to give information to whoever asks; deal with information relays, which are basically the media journalists; ensure that we are properly understood; that when we do some activities, we explained it well so that people understand the why and the how. And we try to also proactively portray ourselves as a company that is well established in Europe, making 70 or 75% of the cars that we sell here in Europe, made by our European factories using European suppliers, in order to give a sense that we are good, strong and contributing corporate citizen that bring jobs, skills, technologies in various European countries; that we try to participate in the European automotive industry with topics and progress through ACEA and various working groups in which we are part of. So, there's a lot of technical legislation, that is continuously being repaired and evolving. The opinion of somebody like Toyota is important

and we feel to be part of that discussion along with the European audience and other stakeholders, just so that we can anticipate what the regulators in Europe are thinking about for the future (environmental regulations, safety regulations). As manufacturers, we must possess proper and correct factories, that respect the law, and that try to be one of the best performing companies in a matter of Corporate Social Responsibility, Finance, Social or Environment. So as Communication department, we must explain that and make sure that people are properly aware of it; that they understand it and that they have a good opinion of Toyota generally speaking. By preparing messages, doing the reactive communication or proactive communication via our website, we produce some events where we try to explain to either journalists or government people, what we are working on, we open our doors and have some technical explanations from engineers, for them to understand hybrid technology, safety technology or every trendy or emerging topics which will have an impact in the future.

We do have a lot of engineering capability in Global Toyota. A lot of people are working on a lot of topics. So, it's interesting, as Communication, to explain that. We also use social media, as a new channel basically to, propagate our messages and to also interact with people, because there is a lot of Toyota fans. Part of the organization also deals with a Motorsport: We are quite involved in motor sports. We do Rally (WRC), Endurance (WEC) and "24H Le Mans" and those things are based in Europe also. We switched to endurance because we could use hybrid technology, which was more in line with the kind of day to day products that we make. And we were successful last year, we won Le Mans. So, Europe is important for a few reasons. One is at the forefront of environmental regulations in the world. European citizens are quite demanding, the European Union is driven to be the leading region in the world in terms of environmental protection, and so the targets that the EU sets for vehicle emissions. Whether it's CO2 or Air quality, Europe is one of the strictest in the world, usually ahead of other regions. It's one of the important reasons for Toyota to be present here; to really understand how to anticipate, try and plan enough time to be able to engineer the cars that will be ready for that kind of a requirement in the future. We played this kind of "antenna function". Secondly, it's a region where there's a lot of fundamental research that's being done in universities in advanced areas such as Materials, Computer vision, Mental physics. So, our R&D function take a cautious look in it, so that these guys look at 10, 20 or 30 years down the road, try to see ideas for breakthroughs and technology. We, as researchers work with professors and students in these universities, PhDs; are well represented and implanted in this, in order to capture these research efforts as part of the global R&D effort of Toyota Motor Corporation. Then another reason is Europe is a place where the automotive industry is historically very strong. There are a lot of old carmakers such as Mercedes Benz, Volkswagen, BMW, British, French, etc. Every major country had, almost at some point, a national automotive industry. So, it's a good place

for us to rub against the competition and to learn from them to compete. Then, along with that automotive history, Motorsports, mentioned earlier is very popular or has been very popular in Europe as well for many. So there's a lot of heritage there too, which is in line with our belief that cars are an emotional products, that people don't buy a car, like they buy a fridge, but they are attached to their cars, give them names, and are part of people's lives. We call it "Aisha" in Japanese so "sha" is star and "ai" is love: So "my beloved car" basically is an important aspect of how we view cars and how we view ourselves in society. So, we bring a product which helps people lead their lives. That's one aspect where the European sensitivity is on good, premium, and best cars in the world. People in Europe still like cars, talk about cars all the time, drive them, under various car cultures like Italian, German, British, French. So, it's a good place for us to be for that purpose and communication is about all these topics. We deals with government affairs, European institutions, because of their leading role in shaping legislation of the future; and we are using it as an "antenna place" to capture what's going to happen, we try to influence decisions in a way that would be not detrimental for a carmaker. If legislations are set up without enough planning, it can be very disruptive to the whole process. We don't mind understanding the objectives and collaborating to achieve those, but if we are not given the enough time or space to do it, it can be more difficult for us. We are keen to promote technology neutrality, meaning we prefer that the objectives are set by the society, by the citizens, by their representatives. When it comes to safety, it's obviously critical that we are providing a safe vehicle as possible. Cars are an extremely regulated device. We are attached to car business, environmental impacts and city impacts. Cars are involved in accidents and cars have injuries and that's unfortunately not just because of the car, but also because of people behavior that we're working with, and on driving the road infrastructure. So, there's this very complex relationship between the user and the vehicle itself, and between the vehicle and the infrastructure (charging vehicle, electrification, traffic infrastructure and good roads, design, congestion, avoidance things etc.)

The second aspect of my role in terms of internal communication is to make sure that the employees feel good about working here; that they understand what the objectives of the company are, what direction we're taking today and in the future. Referring to the teamwork concept that I mentioned at the beginning, about NUMMI, Toyota is a company where we have a relationship with our manpower, our people; which is mutual trust and respect. We feel that we must explain to the team members, what is it that we're doing, what our challenges, our constraints, what the market is like, changes obviously that depend on the economy and various factors. It's our duty to explain that to them, so that they understand what the company faces as a business. Then we should expect their contribution in return, not just in their body, arms, brains, but also their willingness to contribute to the future success of the company

because the success of the company will make their personal success. We see the relationship with employees as a long term "road". We are not a "hire and fire" company in that sense, and this is a very Japanese characteristic that's kind of carried over. In Japan, companies are the kind of special role in society and lifetime employment is kind of the norm; even though it's changing. Being a very old traditional company as Toyota requires obviously to operate like that. So, whether it's better or not, I don't know. But that's kind of our culture. And we have set up this relationship also overseas. So internal communication can help basically increase the affinity between the employees and the company's interests, and do it in a way that is pleasant, not conflicting and constructive. Communication is beside HR because it has a different role to play and it is more liberal, because we can speak very openly with employees.

How do you communicate with the other departments for them to be on the same page? Are you supporting all business in TME with communication outputs? When TME communicates, what are the main areas in which you focus to communicate?

Usually we give them the "voice": We feature employees into our internal tools, we have an intranet, we have a news page, etc. We try to highlight various activities that people are doing for the company so that they can feel the pride, that other people can recognize their work, that other people can be informed about what's going on in various parts of the company. And there are many, many functions in TME. When you're working on one thing, you don't necessarily see what's going on in other departments or divisions. We also take the messages that top management wants to disseminate, top down (achieving certain cost objective, safety targets, zero accident, etc.). Right now, we are in an interesting period for the automotive industry where technologies that have emerged as a result of internet sensing technology, Internet of Things, etc., are going to have an impact on what cause will be capable of doing in the future. Whether it's for automated driving, electrification, connectivity, connecting to the internet, using vehicle apps, or providing services based on the connectivity of the vehicle to cloud, sharing information between vehicles, predicting traffic, understanding road, there's a lot of technology that is changing the way that we have to think of the car and what kind of value we give to customers. Maybe not just the car but also services together with a car which, they imply that we need to integrate different aspects that were not part of our responsibility before. So more and more, we have software development in addition to hardware development. We have services and connectivity development, not just car development. That means we need to hire people and develop people so that they become as good as tech competitors from Google, Uber, Apple or else, who are by the way interested in coming into the car market. They are new competitors to us because of their value in the IT world that is colliding with auto world. Google is working with autonomous cars, Uber has been developing

autonomy as well in order to see if they can prove their business model is removing the driver from the equation, Competition from electrification market (Dyson for example) is bringing new players into the auto industry, which were not carmakers before. So, we need to be prepared to compete with new players and, we need to change the way that we are working inside Toyota and trying to enable this cultural shift. which is also part of what we need to do as HR or Communication or Top Management direction to the people. We need to work faster, adopt techniques like SCRUM or Quick Development Cycles, etc., which were not traditionally the way that you develop the vehicle. And so, this kind of new way of working we need to try and make people aware of that.

In terms of staff, how many people are you in TME? How many National Marketing & Sales Companies (NMSCs)? European Manufacturing Companies (EMCs): what are the motivations that led the company to implant itself to these countries?

We have 30 or 31 NMSCs that oversee 56 countries. Some countries are grouped under one another: Central Europe has Slovakia, Czech Republic, Hungary. In the Baltics, we have one NMSC for three Baltic countries. These European countries go from Portugal to Russia, in order to cover everything including Russia. So, it's not just the 27, but it is a continental management. We cover Israel, in our environment, Turkey, Azerbaijan, Kazakhstan. I mean, my role depends on what part of the process we're dealing with. In manufacturing, we must make investments sometimes either, to update our equipment or to change our model every five or six years. So, sometimes we work with governments in order to see how they can support this investment. They make it easier for us, manufacturer to choose their location as opposed to another country or another region within their country by giving some tax incentives or some funding for training of the workers. We work with them to understand what they can provide or what their direction is. Of course, in every country who operate a manufacturing operation where we have factories. As a manufacturer, we are bound to respect the laws of that country, whether they are national laws or European laws. We must meet all kinds of regulations. We are subject to being taxes, being audited on several processes. We have reemployed workers based on labor law, etc. But my role is more to make sure that we have a constructive relationship with various elements of government at various levels. Whether it's a city level or regional level, national level, in order to help when the operations need something from government, the doors are open, and we can talk.

“The Guiding Principles of Toyota”, “Code of conduct”, “The Toyota Way”, “Genchi Genbutsu”, “Jidoka”, “Hoshin Kanri”, “Being a mobility society”: These are the tools of

the company to expand its vision on a global scale: What does it mean to you? Do you apply any of these items into your department?

So, regarding the Toyota culture that is very much shaped by these concepts. The Toyota principles were the principles that Sakichi Toyota had, when he created his own company in the early 20th century, and they were written down by Keishiro Toyoda in order to carry them through the generations. So, they were formalized in five of them. These kinds of sets are preamble of the Constitution. They define our ethics, and they are communicated widely within the company, sometimes posted and are anyway available for people to be aware of them. When you start in Toyota, you are briefed on those principles. It's part of the HR training we receive. The second aspect is the "Toyota Way". Toyota Way 2001 because in 2001, it was formalized into a document called the Toyota Way: it's a green booklet that has the two pillars: Continuous Improvement and Respect for People. Continuous improvement is made of "Challenge - Kaizen - Genchi Genbutsu". Genchi Genbutsu means "going to the place where things are happening" and understanding it, studying it from that perspective, meaning relying on facts beyond data. Kaizen is improving continuously, and Challenge don't hesitate to set demanding targets. Because the process that you will use to reach the targets will give you benefits, even if you don't reach the target. So, don't be shy to set a target. That's hard demanding. Respect is the notion that I mentioned, the contract between the workers and the company: I respect you for who you are, as a person and as a group. And in return, you respect the company and what we're in business for, and you give your best while you're working. That means respect is kind of a combination of rights and duties. Workers for example must show up for work on time. That's part of respect and teamwork is working together sharing information, respecting people as individual.

This is also taught through all the employees as part of their training: Whether they are brought in as a young graduates directly after university much like in Japan, we do have such a graduate program in Europe as well or they are recruited from outside mid-career, later on. We all go through a certain integration period, one or two weeks, where these concepts and principles are explained or taught, and then later they are reinforced through "on the job" and by formal training as well. For example, if every employee is evaluated every year, and that evaluation is based on expectations and certain competencies, these competencies are derived from the Toyota Way, so there's a direct implication or correlation between the Toyota Way and how we develop people. Besides the annual evaluation on the job, the supervisor is supposed to be a teacher as well. So "on-the-job development", we call it "O.J. D" is our way of working. That means if you're a boss, your responsibility is not just to make sure that work is defined in one direction, but it's also to make sure that people grow and develop. In other

words, my job as a boss is to develop my successor over time. I'm not supposed to be the king of my kingdom. I'm supposed to develop people for Toyota, not just for me or my team. My part of the role of any person in management is to be this "people developer", a teacher and coach, so that people will gradually become better. I do that, of course, in my job, and every manager of Toyota for sure, is doing the same thing. We also use the Toyota way as a criterion to select people for promotions. Based on how employees grow and develop, in their evaluation, when it comes time to choose somebody to be at a higher grades, give them more responsibility, or put them in a management position; we have a promotional process, which confirms that they actually have acquire the competencies and the level that's expected. The criteria we use in that process is called a "promotion panel". People must prepare a presentation based on the work they've done in order to demonstrate their capability. The criteria that we use to evaluate is based on the Toyota way. It's very well integrated into the HR system.

Hoshin Kanri is a management process in order to ensure that every year the direction of the company is set. In order to move organizations that are large like this, it needs to be very clear to people what they what they must do, or what is the orientation that we're taking. Hoshin Kanri is an interesting process because it's based on the top down and bottom up alignment. How it works? Very simply. Every year, the top management discusses which direction we're supposed to take, based on different inputs: it can be on the market evolution, negative positive, legislation, competition, own performance, what do we need to improve in some places, etc. They discuss about this, anticipating, looking in mid-term and then looking more closely at next year, breaking it down. The direction is set. It says we're going to go that way. This process of setting the direction is a lot of discussions between functions, cross functional, so that we all understand what are the important things next year, which will be prioritized and then that is shared with the entire organization saying, this is the "Hoshin" for this year. "Hoshin" means direction in Japanese: If you have a compass, and the needle that points to North, this is the direction. Then Hoshin is cascaded down to every level of the organization, they must interpret it for their function, and they break it down at their level, divisional level or functional level and the division departments. Then at the end, it ends up in each person's objectives on tasks or projects, at the micro level, because they are in line with the direction of my department vision company. We use the PDCA (Plan - Do - Check - Act) and recycle this process through on an annual basis. Even within the year, you check with mid-points, your objectives, what have you done, check and adjust if possible, to then recycle it in the next year. As a European, on a local/regional environment and demand, how do you apply the Hoshin Kanri in your department and how does it get scaled down on decision making process?

So, there's two things: If you take work, what must be done? A portion of it is so called hoshin kanri. So, these are the kind of based on midterm, what direction we should. So usually, Hoshin are carried over from year to year and because it's going to take several years to achieve that objective. This is one of the kinds of usually a difficult challenge to reach, to break through, and to change in the way that we work and anticipate. So, some Hoshin are carried over, some Hoshin are stopped because we've already achieved the targets, and then we take a new one to apply it on daily management. Hoshin Kanri is supposed to be a prioritized list in order to achieve a mid-term direction. Then of course, there's daily operations: When you make cars every day, they look the same. You must make 200,000 cars per factory. It is very stable, planned. Every member on the line doesn't have hoshin kanri to think about, they have a daily job. So, most people are involved for most of the time into daily management and to some extent, have their own personal objectives as white collar workers. They have some personal directives with which are linked to hoshin kanri. Most of their work will be the management's and then a factory worker will have almost nothing related to hoshin kanri. They will be all daily management like TPS (Toyota Production System). And depending on the hierarchical level, your exposure to implementing the midterm direction is different. If you're the president, almost all your job is looking at that midterm. If you're the line worker, almost zero, and there's a variety. That's how it works, and we do use the process of company level, divisional level, department level. That process is the same in Japan, the same in every region of Toyota in the world. So Hoshin Kanri is also a way for us to communicate with each other, using the same language. Of course, at various level, the management has some freedom to act, because they oversee that area. As a Communication manager, my role to look after this area. Of course, I must have some personal accountability and responsibility for that. It's not that I just do exactly what I was told from above. I was given a direction, it is up to me to figure it out how to do it, how long time it should need, what resources do I need, budget, etc. Every manager has an area and they all were all in charge of a piece of the pie. That is why one of the aspects we value in Toyota is teamwork: we teach ourselves to sometimes overlap. We are not just setting very strict border between things. We are encouraging people to look after the totality of things so that we don't miss something. But there is management freedom at each level, depending on the hierarchy. The more you're in charge of something, the more you have free way to set the direction. It also happens at global level: TMC says the direction globally, but TME must set the direction of Europe, based on the TMC direction. We propose it to them. They approve it, and then we move on. It is a back-and-forth process.

How do you communicate with your Japanese counterpart? How your communication differentiates from the global headquarters (in terms of content)? So, basically, the whole strategy to thinking was implement, of course by the Japanese counterpart, but

how do you communicate? Have you encounter any problem issues on understanding the Hoshin Kanri? Have you ever encountered drawbacks with your Japanese GHQ colleagues? On which case?

Yes, we had. Something like hoshin kanri, for example, is not so obvious for the Westerners. At first, this process is "back and forth", not natural, and has not been taught. To us, process like this are either top down or bottom up. There's very little communication between the levels. If you're in a German committee, it is top-down. French company, it will be little different. So culturally, we all have a background, and hoshin kanri is not so easy to grasp at first, because it can appear that the direction is not so clear. So, when you look at an Hoshin documents, especially at high level, there's no targets, no figures. It's only words, and it says we're going to go in this direction. These words are very vague and fluffy, very philosophic and very Japanese in that sense. Whereas there's a lot of meaning that is packed into a few words. The Japanese language is like that and the content you use is in Japanese language. So, there's always this kind of ambivalence in Japanese culture, which leaves things a little bit open and fuzzy. That in turn enables people to take ownership of it. To some extent, their interpretation of it is okay. They are part of the team and so you can co-create the direction that has been cascaded down.

The other aspect is every day, because of the cultural differences and the way of the way of speaking or understanding the world, we have a lot of cross-cultural misunderstanding. All the time. It makes it a lot of fun. I think personally, some people find it frustrating. It depends what kind of outlook you have on it. My advice to people who started in Toyota is "Don't get hung up on that because you're going to get very frustrated if you do". But the way that the Japanese get instructions, manage people, organize information sharing, write, express a thought or direction, check things with various people - Nemawashi process, making sure that you establish good consensus between peers or people who are supposed to be involved in a decision either directly or remotely - is important to the process. You need to create this broad understanding and agreement before you make the final decision and implement it.

That is something that also requires the Westerners to adapt to, but we all get the hang of it eventually. Some of us are better at it, some are worse. Some people remain more European their way of acting and they fail to absorb enough the way of working in Toyota; which make can make it difficult for them to progress and be effective. We also created these tools, hybrid in every region, which are "communication tools": basically, HR tools but they are communication tools like hoshin kanri, problem solving, or TBP - Toyota business practice: This is a way of breaking down the problem and arriving at solution. Six step or eight steps problem solving, you can look it up because it is defining a problem, breaking it down, setting

the targets, understanding the why, identifying the root cause, and implement, based on that cause. We evaluate countermeasures, choose the ones that are the best, implement, and then verify. That's the problem-solving way. We're all taught that. And that's the way that we tackle almost every business issue at various levels. This is a common language just like Kaizen or Genchi Genbutsu, the values in high level; and that enables all Toyota people around the world to understand each other very quickly. When you come into a discussion or meeting, where something is being discussed, you almost automatically understand which step of this you are in. That makes the discussion much easier.

We also use physical tools like in order to explain something to someone, in order to make a report, I'm not going to produce 10-page brief using words and chapters and sections. I'm going to use one sheet of paper. It's called "A3" because of the size, where you put all the elements on that. That means you must be succinct, to make the flow, various aspects logical and that tool enables a lot of people to very quickly understand what the problem is, what we need to do, etc. Writing these A3 are also something that we teach to our employees. And we're all supposed to be good at it. When we come into a meeting, and we must get people around the table to agree something, it can be based on that tool and that means it makes it easier, quicker to communicate and to design.

All those tools are originally Japanese made but some tweaks have been added. Americans tweaks because they were the first ones to apply these, after NUMMI. When the local HR people and trainers took the tools from Japan, they adapted them so that the language was easier to understand. So, we have globalized it, but the principles are the same, the basics are the same. That means I can go into a meeting in Japan and I can basically understand what's going on even if I don't understand the language. That's already "once per step beyond language", which helps. I can go to Brazil and probably I'll see A3s and I can easily communicate with people who use problem solving. There are some things that are problematic often is how to make decisions: Within Japan, it is not often clear who decides and when a decision is made and sometimes even what the decision is.

We face this every day in Toyota. So, to summarize it, I would say that within Toyota in Europe, or in North America or South America or wherever, the way that we make decisions together, communicate; the way that everything is written is very influenced by the Japanese way. We use Nemawashi, consultation, trying to create support for a direction or decision before we make the decisions. We spend more time in the planning phase of PDCA. Because then once you "do", you can be very quick. Once the decision is made, then the Japanese "act" very quickly like in an army. It's like an instruction from an army general with no discussion. But

prior to making the decision, lots of discussion. There's a difference between the two phases and then after the "Do", you always must track and adjust. So, there's plenty of space for freedom. But once you do, if you say we're going to do this, it must be done quickly, and according to what we decided. The operational part is very army like and very effective, efficient. The management part is not efficient, on purpose, because that's how you create the support where you're going to go. You try to align the mindset so that once everybody understands, then they become very, very capable to go fast. So, within Toyota, regardless of where you are in the world, basically we follow this to a large degree. I'm not saying that we do it like in Japan. There are differences. The way that I manage my people is culturally appropriate for Europe. I'm not managing my team here in Europe, like I was managing my team in Japan, same thing when I worked in North America. There are several things which are cultural, and you must pay attention to that. You must fit within the cultural context. Some of the things that are in here, although we're heavily influenced by it, it's also the local source that make a difference. It doesn't look like the one from the group, although the concept of Principles is similar.

Now when we work with people outside Toyota, for example, our dealers, suppliers, or in my case, media, and governmental, we don't behave like Toyota people. We behave like how it's supposed to be expected outside Toyota. That means if we're part of A.C.E.A, with other carmakers, we have meetings with other characters within the A.C.E.A context: These companies are European. The way that they write briefs papers within the presentation, make decisions, is very much European way. We must fit within that we have to use their language and their way of making decisions. And then we must translate that into internal language so that we can explain it to our Japanese counterparts.

You might hear of Japan – UE EPA and all the advantages displayed by the European Commission and some business lobbies, but what are your thoughts on that? Do TME has an interest in this economic partnership agreement? If yes, in what areas?

Well, we have interest on one of the key points: No tariffs on imports, apart from Japan and vice versa. So, for us, it can create an opportunity. For example, we're paying duty on parts we import from Japan today. And after the EPA is fully rolled out, we will not anymore. So, we'll save money and then that gives us an opportunity to either use that money as profit or reinvest some of it or lower the prices so we can sell more cars. There's a variety of things of course, we will do with that opportunity based on our strategy or based on product line. But it is a plus for a company like us. We are in general, in favor of free trade, as a company, it helps develop business, create opportunities, grow our business.

We literally lobby in favor of free trade or an EPA. If our opinion was asked, we support. But then it becomes much more technical. Sometimes we just have some information to provide so that people can understand what the future in fact could be on this dislike us. For example, Brexit situation now, we must explain to governments in the UK and EU, how we run our business across the border with supplies and factories in the UK, supplies in UK factories in EU; just in time, flow of parts. We don't run with more than two or three hours of inventory of the factory. So, we need to continuous flow. We don't need to have border checks, because that will slow down and so we must explain how we're doing our business so that they can think about what impact would their decisions have on businesses like us. You must consult other businesses, of course. But that's been our role is to kind of explain why we think some agreement between the EU and UK would be better, because it could really have an impact on the operations. And if it's negative, then that could create some operational difficulties, which could get resolved but even short term that's annoying.

It can create cost because you must overship or stockpile. If you're if you have more costs, you're going to have to translate it into higher prices for customers so they will lose out. They'll have to pay more for car. So, there's a variety of impacts that we can understand. Based on our business, our experience, what do we do, that we have, we have the duty to respond to governments and say, you know, decision is yours. People is sovereign, we don't get involved in those politics. But we can at least say as Toyota business operating like that, this is "this is what this will mean for us" and it could have an impact plus or minus depending on what the issue is on our decisions on future investments, price vehicles. We are, as I said in an economic context operating abroad, we must capture what's going on and help TMC in Japan understand that so that they can make the right decisions.

Are you involved in in lobbies when it comes to these projects?

A.C.E.A is the representative of the automotive industry in Europe. We are a member of that association. We do lobby, if you call it that. We are a member of other groups. There's a bunch of lobbies, like European Traffic Safety Council, Belgium-Japan Chamber of Commerce Association. Whenever we are present in a country, we are usually a member of the that country's association or Japanese association, if we are asked to be a member. We are also connected to the Japanese Embassy because we are an important company and they want to use our time, opinion skills to help them.

Some of these organizations, we are member as Toyota Motor Europe and some of them it's TMC who is a direct member. So that can be there can be differences depending on which

one. If it's closer, if the dialogue counterpart with the EU is the Japanese government directly. It's usually TMC who's then asked or involved. Just because it's their national government, but of course Toyota is not the government. We know that we have different interests from government sometimes and TME also have government relations in Japan. So, it's not closed. There's dialogue or information sharing depending on what is within appropriate, legal and so on. In A.C.E.A, as European Association of car manufacturers we are numbered, but when it comes to Japanese issues, we step out because we have invested interest on something maybe conflicting with the group, right. So, when it came to the Japanese EPA, TME do not influence this process.

What do you think of the regional demand of the automotive industry (as TME)? Has the European market met similar demands from Japanese market (with the example of the Mobility Society Strategy implemented by TMC)?

It depends. The big direction is global. The product base, obviously, when it comes down to it at the end, we are carmaker but also will be a service provider or technology solution provider, etc. So, it's expanding. When it comes to implementing this, you must do it and each market, in the appropriate way. And that's true for selling cars for implementing urban mobility solutions. And, when it comes to mobility, then you kind of go beyond just giving a privately on-car to a customer who buys it and then uses it in the city. That's a very simple relationship. We don't create the roads, we don't have anything to do with traffic, lights, infrastructure, all that stuff. That's the job of the community or society. We get cars, we sell cars to customers. If society says your car needs to be cleaner, they set a target and then we must comply with that. But the car the relationship is with its unusual customer cars or fleets. Sometimes you sell large fleets of cars to corporate customers or corporate clients.

With mobility, you go into a new area, which is much more integrated into society. You're talking information data, where the infrastructure and the vehicles are speaking to each other; providing solutions that can help a city alleviate congestion or design an area where automated vehicles will operate without drivers or where there will be zero emission zone, for example, all that stuff. So, in this new paradigm, we have a social role to play. We must start entering dialogue with cities, with regions much more on an operational basis. And that's interesting as a new challenge. So what we're saying in Europe for example, one of the ways that we are translated this direction is we have two traditional customers - the private buyer, the fleet buyer - and then we have a new customer which is the city and we have to learn about this customer. We must understand how they work.

We've done some mobility related projects in the past including in Europe, we had the Toyota's Ha:mo (Harmonious Mobility) system, a personal electric mobility vehicle ride sharing program in Grenoble for three years (2014-2017), where we deployed 70 small vehicles. We work with EDF, who provided the charging infrastructure for these vehicles. And we work with the city of Grenoble in order to get the parking areas for these vehicles, and install the charging points, and then to do the promotion so that the citizens would use it. This kind of a partnership must be built. We've done it on a on a test basis with several cities around the world via Hydrogen Mobility Europe (H2ME) Project: In Hamburg, we have helped the city to do an analysis of their mobility issues, for example, so that they can then choose the right solution. We work increasingly with startups, like, right pooling, right sharing. We work for example, with HYPE in Paris with hydrogen vehicles or with clever shuttle in Germany, where there is a common interest, the kind of cars they want to run. They, in turn, try to create the business model and offer an alternative type of mobility to the people living in that city.

So, it's expanding the horizon of what working in the auto industry means or what working at Toyota means. The extent that every region has specificities almost sometimes every city drives us to adapt it local. We might choose one region to pilot certain area because that's more appropriate for that or choose another region for something else and so on. The big direction is set in Japan: The kind of basis for this the mobility service platform, the cloud, the IT infrastructure, all that is built kind of centrally via Toyota Connected. We have also created Toyota Connected Europe and North America, so that we can have the local capability and understanding the talents. But then after that, we must, and we install a data communication module in the cars. So that's the same basically wherever the car is sold. The hardware is common, the software for dealing with big data and trying to make sense of it and getting value out of it, that's also developed centrally or with some regional spread. But then when it comes to the actual use case, providing a solution for a city or a country, that's something that we must work on as a region.

How do you describe the relationship with governmental and institutional counterparts?

It's like any company, but we must mention two points: One is, in our Toyota approaches, we want to be a good corporate citizen. We want to work for the benefit of society. Ultimately, that's part of the Toyota principles (#5). So, this is something that is deeply ingrained in our way of thinking. Almost, it's strange, but profit is not our number one obsession. As a company, which is a bit weird, it feels a little communist, you know, but that's a big strong stronger word, but, but there is that, and I think that comes from the Japanese culture. The borders between things are less sharp in Japan. Whether you're a company or you work for society or etc., I

think because of the collective mindset, you're basically part of one group and each person and each group has a role to play and so on for the benefit of the group. We are kind of in that mindset. That means we want to benefit society. So, we decided to make cars because cars are coming up, and Japan needs to industrialize and to develop its own car industry. And we need to have be able to make a Japanese car for Japanese people, because we need to develop the capability to make cars otherwise, we will be dependent on other car makers abroad. That service to society is something that has stayed in the company culture.

So, when we approach governments, we have this kind of thinking way. Then practically, it depends on the relationship we build, on individuals, on sometimes all it takes is somebody who has an affinity for Japan to build a good relationship with somebody. it can vary. There are some institutions where we have good relationships with a representative, some of them less good or more distant, it really varies but, we take responsible, constructive approach. We tried to be as honest as we can be, candid and open. We are fact based when we make internal decisions, but we're also we stick to facts when we explain things when we talk with stakeholders so that it stays straightforward as possible.

Annexe 25

Mark Mildon

Senior Manager Corporate Communications

Toyota Motor Europe

Brussels, May 14th, 2019 – Time 1:21:07

What is your academic background and How did you arrive at that position?

Mark Mildon, I'm British, born in England, but I spent most of my life, overseas: Belgium, Spain, Japan. I studied in Engineering in Durham University, where my thesis was on Toyota Production System (TPS). I found this internship because I wanted to see TPS, myself, so, I managed to get that in this subsidiary of AISIN AW, in my second year. But it was an atypical situation, because, it's more profitable and more successful than its parent company AISIN Group. They were internationalizing. And as I mentioned before, I did like the internship where I rotated through all the 23 departments for 4-5 months. It wasn't like a typical internship: I think I was needed in the HR, helping with English and in the IT, where I basically did Y2K. Then they asked me to stay because of this one-year project for space in international control: that was basically training American managers, 50 new hired on different waves of Japanese manufacturing techniques. And then, when I was going back to Shell in London, they asked me to extend one year. And as I explained, I wanted to go into manufacturing, they said "No", I wanted to go into copywriting, they said "No". I ended up in Sales Planning, and basically focused on Six-Speed Automatic Transmission, selling to Big three companies in America and most of the European OEM, quite successfully. And then, there was a project to build a European factory to meet capacity in Europe.

But as the end weakened, the priority was not there, because Toyota asked us to go to China to support them and double the size of the American factory. I wanted to come back to Europe. I moved back, I went to INSEAD, I did an MBA, I was very lucky, I had three offers: I had one for banking, one from consulting, and one from Renault-Nissan. Because I had written this business case on Carlos Goshn. Hence, basically, I'm not so driven by money, and I was going to take Renault-Nissan offer, working in their purchasing office, initially in Paris, but with the expectation to move to Japan at some point. And, I was very open, and I explained the offers that I had, Consulting was 50% more, Banking 100% more. And I got a call to decide by end

of December. I got a call from the Vice President of HR, or maybe director, I'm not sure. And he said: "Look Mark, just join us, two to three years. If it doesn't work out, you can always go to consulting". I don't know why but I flipped. So, I joined this consulting company called Integra Strategic Transformation Consulting, that had a huge project in Japan, I didn't realize I had no Japanese speakers. So, I was valuable to them, and I was actually paid more and got offered to be paid for three months after the project to travel with my wife in South America. So, I took it. And when I was traveling, the Japanese client called me up - because the project was a joint venture, from a German company that bought a bankrupt Japanese company - and said: "Listen, we want you to come back." And I said: "Well, I'm going to quit". I took the Tech project, started with six other guys and built the company to about 14 and essentially, he was our only client.

Due to personal and family issues, I quit. And then I started looking for a job in Europe. I got offers from to Bridgetown, an importer of Suzuki. And I joined Toyota Motor Europe in 2009 in Product Planning, which I never done before. But I had a really good time, I worked on some self-reliance projects, taking responsibility for R&D and Product Planning to Europe, which should be previously been done in Japan. Then they need me to move on, get more exposure to Sales. So, I moved to Sales in 2012, I was Responsible for Italy and France. And then because of illnesses of colleagues, I covered the Nordic markets, and then Central Europe (Czech Republic and Hungary). That was quite interesting. And then again, Sales were already done with me. So mathematically minded, the company move me to Pricing. I moved there in the summer 2014, despite all crisis that emerged in that period. I was handling all the pricing in those markets, included Complete Built-Up (CBU) pricing. Local Pricing is a lot easier because you have Factory margin and Sales margin. But if you're doing CBU, so cars across from Japan and other regions, there is no margin for Toyota Motor Europe. So, it's a lot tougher in terms of pricing and pressure, and a lot of negotiation including internal, it nearly killed me. But afterwards, I was looking for something, and normally I should have gone to most likely, British market. But of course, Brexit happened. This was in 2016, TME was not sending expats to UK, because that doesn't make any sense at all for them. And at this time, I knew Jean-Yves Jault because we did some cross functional projects together. And he was looking for his replacement. And for whatever reason, his boss was not happy with the candidates. He basically suggested my profile to his boss. He chose me. So, I joined Communication, Internal & External department in 2017 and we've had a bit of a crazy two and half years handling everything, all the crisis.

What is your mission? And what is your responsibility towards your team and what are your main projects?

We have a very weird job because half of our job is pushing messages out, trying to get a corporate message. And the other half is avoiding messages getting out because they will misrepresent what's going on. Toyota is always fact based, and we use "Genchi Genbutsu". I went to Sweden with a Quality team, I just sat in front of the newspaper. And I said: This is what we know, this is our understanding, this is how we do our test, how do you do your tests. We're going to implement the software; you can reach us the car and it was very likely handled. It was probably the biggest thing I've handled as well as Brexit, because we have a UK factory. And we invested for two years, significant amount of money. Then, of course, we have a big transition as a company, like every automotive company, we're trying to shift to be a car manufacturer, to be a mobility provider, we always say "A better mobility for all". And this part of the business is, on one hand very clear, because we started off as new manufacturers and did not completely and radically change. So, the idea of transitioning the company is not radical, it's well accepted and changed has always been part of our culture. But the biggest challenge is probably on the "Speed of change". We are a Communication department; a lot of our work is internal. It is about communicating the new strategy, different ways of working; basically, supporting other departments, on how to change the company. Because it's a big cultural shift, quite exciting. We set up an office called "Toyota Connected" in London, that handle all the data and provide, the backbone for Mobility services and we help set up front office from a PR perspective, was interesting, because they have a lot of money. So that was a good experience. Linear. I think that I deal with day to day with speeches. And my big project now is speech for Matt Harrison, our Executive Vice President of Sales. He's going to talk in Automotive Retail Congress (May 21, 2019), talking about hybrid success, how we did it, and where are we going next in terms of electrification.

I have a team that handle the Newsroom. I have five people in external communication and four people in internal. Four managers, three staff, and Japanese people as well. It is a very good team, very capable. They know more about communications than I do. They handle the newsroom, but of course, I'm the first line of quality control. We're working on press release and targets at each end of the month. In communication, I hate long sentences. I always focus on brevity and clarity; I need a strong logic. It doesn't mean that's what I write, but the thing to remember is that writing is an iterative process. Best Writing is always not in a group, but it's an editorial process, where you have checkpoints. And the key is to ensure that each checkpoint value is being added by the person checking in. And people from the business-like VP of R&D or Sales, also provide pretty good insights in terms of from a business perspective. While we're maybe more messaging and clarity; they're more on: "This is what we need to get across, because this is a core.

Obviously, it's quite interesting job. I spent a lot of time with President Didier Leroy, not so much, because he's not in Europe. But I did a few presentations for him. Before I did this job, the President's presentations were handled another team. And somehow, they ended up on my desk. It's been painful sometimes. But it's okay. It's okay. It's very interesting. So that's what keeps me going.

Do you encounter Japanese counterparts in the projects you are handling? How do you work with them and the others regional colleagues?

Yes, we have a weekly TV meeting with them. And the Japanese team is very strong, actually. I really respect them. Very disciplined, a very process-oriented, they really see a long way ahead: What is going to be the bottleneck in terms of Communication or Nemawashi. I really enjoy working them and they seem to enjoy working with me. Good relationship. And like I said, they are very professional. They've got long history, which I don't have. So, it is a big benefit for me, because I can lean on them for stuff that I know now. For me, the Japanese team is not really part of my team, because it sounds arrogant. But when I think about my colleagues, I think of my Japanese colleagues as part of one team.

I don't know what Jean-Yves Jault explained, but actually the Head of Public Affairs and Public Relations set up what he called the "H8" - "H" stands for a "Higher Power Hit" - on eight regions around the world where he needed input, where he felt these are the major media markets, the ones to set-up the agenda. These are the people that he needs to gather to understand A/What's going on and B/Is our message coming through and how should we change that messaging? So, it's evolved over time. Because originally, there was like several entities that Europe had more than one entity, manufacturing startups outside and then America had consolidated manufacturing. But essentially, now it's like Japan, Southeast Asia, North America, Latin America, Europe, Middle East, China. We meet twice a year. And it's very interesting. I think everybody brings something different: Mexicans are by far way more professional, Japanese are bringing the capability, the history and the processes; we are somewhere in between, we have a lot less staff than the Americans or the Japanese, we have a lot more complexity. Then you see the other regions like Southeast Asia or Latin America who are developing very fast, and the capabilities developing very fast. And they bring a completely different story, because, we're just so strong in these markets. And China is another completely different perspective, and they are very different journey from a very difficult place, going in the right directions.

Is there any difference aside the cultural aspect or the process, between Japanese chain of communication and yours? How do you make it relevant for the local customer?

I think they have a lot more content creation. They're kind of "feeding the beast," as we say, making sure that like, every day, there's something going on the global Newsroom. That's a slight exaggeration, but that's basically situation. Whereas with us, the European, we sometimes carry global stories, but we tend to only carry European stories, because we don't want to bring traffic away from the global site. So, we don't communicate so much, but we're quite fact based. We don't do the kind of more emotional engaging stories. We tried it for a bit, with like blogs and stuff. But the problem is that, valuable communication, is basically national-oriented, because of linguistics and language. What we're trying to do is steer the national organizations that we have around Europe: "This is what we're doing in Europe, so you can localize this in your languages. These are the ones that are coming from Japan, these are the ones we think you should push, these are the ones you can push if you think it's interesting, and these ones we don't want you to push because it's contradictory to how it starts in here". We're kind of a little bit like the gatekeeper; how we add value is trying to share best practice with the markets. Some of these guys are also PR professionals, more competent, a lot of people work there for 25 years. So, we basically help them get information, if they have a problem, quality issue, or want to know more about a topic in Japan or visit Japan or visit R&D here. We are helping them and trying to help them understand "what's the best way to ask", and basically, we support them. And the Japanese colleagues in Japan are doing the same for us on a global level. We're kind of like a mini global PR function in that sense.

What we do have on the newsroom is various: Corporate, Product, Motorsports and stuff like that. So, you can choose what you take content from our feed. But it's interesting, because thanks to EUGDPR, we had 6000 people on our mailing list, and then, after that, the mailing list is down to 700. So, for us, it was a great cleaning exercise. And I think, it means that we can talk to less people, probably give them better quality, better service and provide them what they want. But we talked to journalists, and are very "process oriented" towards them: "Why do you want to talk to us what you want to hear about, and then we feed it back into top management and say, Look, you know, this is where we see the conversation going". When I arrived, there was this, what we call a Q&A document, 200 pages. I had to read this, like if it was the Bible. This is this is what all the EMNCs or our SMCs use to answer any question that comes in. I said: "Who the hell and the top executive has time to read 200 pages? Well, you know, there's one guy, he reads it. I'm sorry. Okay. And one of the other guys say, I don't know, I think they just kind of scan it. I said: What do we want to say, at this motion? And we turn it

into a 10, page document: Product, Corporate, The Media point of view, our stance; and things that may come up.

So, we should be prepared, because it's not something our executives are crossing every day. So, they should know, if I get asked the question on cobalt, this is what I can say I get asked a question on, China is what I can say or something. And it's worked very well. We did 10 pages the first time and of course exploded because everybody wanted to put the messages. So, it's an interesting process. I think we did a pretty good job in Motorshow in Geneva, in terms of preparing our executives, clear messaging. We cut through on electrification with our corporate coverage. I think the best coverage we've ever had is when we announced in the Motorshow, one year before, that we were discontinuing diesel. I think we were #2, from a corporate coverage perspective, which, given that we have market share of just 5%, is amazing. It was the right time, the right place. Because it's very concrete, because every competition was talking about, discontinuing on 2022, or 2013. We just said: "Next year, no diesel passenger cars, we keep commercial vehicles". For some of the countries we covered, it sounds "too provocative" to come out with such a bold statement. And, Sales where certain markets, like Ireland, Germany, were "heavily Diesel", they wanted to transition from a product and a communication perspective before TME officially announced it, because they were worried about that. These are our challenges that have conflicting agendas: In a small company, a country like Ireland, very important for us, they're independent, they have a strong voice, even though they are small. And we honestly will be tailored that communication strategy, not only on Ireland, but along with Turkey, Germany, Portugal. But anyway, it was the Nemawashi process.

And the other thing we try and do is create news. In Safety, we don't have a lot of Share of Voice. So, I organized a Safety seminar with the Head of Toyota Research Institute, Dr. Gill Pratt. And we did a nice little video to summarize it. We got a guy from TMC, who's basically running the Safety program, he got an academic support with research in Europe, and the Head of R&D, just giving a kind of intro to the topic. The format went very well: what's interesting for the journalist access is, to ask questions. So, we did essentially less than one hour of presentations, and then did a very long Q&A. Then they got to drive the car. And we wanted to do something similar last year, for various reasons, we could not. One thing we're very good at, as Toyota is when there's a process, the nemawashi and the pressure are all very, very high. And it takes a long time, maybe going to be more complicated.

Do you apply the Toyota Principles and the tools (Code of Conduct, etc.) in your daily activity and in his teams? Do you use the Founder tools on getting back to the guiding principles?

I think it is funny, because I got all this stuff when I joined, and I did a new hire orientation. I knew a lot of actors, because I've studied to the production system. So again, I don't use these principles, but when I did the new hire orientation, a lot of this is implicit, of course, we all go through the training but at the same time, the values are there. In a meeting with client in bankruptcy and Toyota, I am asking myself "So what's the difference between Toyota and this client?" Well, I would say that in Toyota, 80% of the people are very, very strong. In the client, 20, 25% of people are very strong. If you want to be successful in Toyota, you must live and breathe the Toyota values. There are no superstars. Of course, there's one or two exceptions, I would say, some people have exceptions in their minds, but the values are really, strong. I think that's my biggest takeaway. This very logical approach, using TBPA, what we call Toyota Business Practices Activities, Root cause definition, and then working towards a solution. Honestly, I'm very comfortable, because I'm a very large logical guy. For me, it's a very comfortable place to work. I think for some people, it is not comfortable at all, because they may be more emotional. And often, people who are very good at communication are quite emotional people. But we're probably looking for people who are emotional and structured. My supervisor, M. Jault is very structured, also quite an emotional guy. I'm also a bit emotional, because, I'm Celtic, I have some passion, and so I bring a lot. Passion with a structure is probably how we operate. People expect you to come to the office motivated, motivated to do your job, motivated to help other people do they know. People in Toyota are very strong and don't live in survival environment, and I respect that: Principles work with guys recruited from outside, and even to people changing department.

There are some documents. In my desk. If you want, I can come, and I can show you. What is the last time I looked at it? 9-10 years. But I don't need to, because I see every day. It is an "aide-mémoire" and more like when you want to structure something for, the Manufacturing guys that are considered like "ninjas" when it comes to TBP. In Japan, Toyota is viewed as weird, because they're very successful, but they come from the middle of nowhere. "How did they end up being there?" because they're not necessarily the most successful Japanese company, but a lot of people perceive them as the most successful company. Toyota can be perceived as a tank is because it's a little bit military in the sense that, when the decision is made, it is unstoppable. When it comes to PDCA, there are many American and European companies that I view as having Japanese values: long term planning, especially family companies. I don't think it's exclusive to Japan. But I think one thing, which is quite typical, is

the implementation is so much faster and it's because the decision making is slower. When we talked to Scandinavian colleagues, they haven't worked on nemawashi in Danish or whatever. It's about, you know, building consensus in Sweden, you build consensus, everybody gets in the room, the guy who cleans the toilets has the same right as the President speak, there's a decision, and that's the direction. So, such values are not exclusive to Japan. But I would say that, what we would see in other large corporations is that, there is a «a silo" mentality, where one department or several departments are stronger. So, the decision is made by the stronger departments, and it's resisted by other strong departments. Once the decision is made, there's no excuses, even if you disagree earlier. That's not like a specific thing from Toyota. There are always decisions that you disagree with. Otherwise, we don't have any kind of diversity in opinion. So, in general, I'm on board with resumes, I would say, often. People have different types of logic. My logic honestly is different. I think for communication; we are very aligned. But my Supervisor's view of the world is probably slightly different from mine. For example, he has different media references: Coming from the French tradition, very exposed to American. I'm much more exposed to Japanese the way of thinking and communicating, can be quite Japanese, sometimes. I'm a lot more patient than he is. Because even though he lived two years, I know, they're eight and a half. So, my level of patience is much higher. But honestly, I think it's good. I mean, he never gets upset. It's never about the people. It's about the arguments. Right. I think that's pretty good. I find it more difficult to interact with other people who are not transparent. I can say the same thing with the EVP of our department. As a rule, we were aligned. He has 30 years' experience, so I am opened to receive some pretty good advice.

So, when it comes to intern relationship management room, are you closer to Nemawashi or Hoshin Kanri?

This year, particularly, I set the Hoshin for our department, which is interesting, because it was Jean-Yves who is responsible for the whole department, and he just came back. And it was honestly was a bit chaotic. It's a typical process, because it's meant to be middle-out, but nobody really knows what the middle is. So sometimes it feels like top-down or bottom-up. We have clear direction on a global level, but then we need to adapt it on the European level. So, we kind of plug into the global, make sure we're not too far away from that. But of course, we have a specificity. Then, there's certain things that we don't do. From my team, I spent a lot of time last year getting by, talking to the team and saying: "What do you? Who are we? What do we communicate to the outside world? What are the key things? What are our priorities? And what are we going to do now? What can we measure?" And they say: "We're communicating in these areas, and we're getting share a voice in these areas." So this year, I was out for

personal reasons, so I actually came in at the end of the process, and we just cut and paste last year, because our challenges did not change since last year, and they added a few things, take out some because we prioritize. But it was simple.

What are the main challenges for this year, in your department of communication? What are the objectives of the division related to the global vision?

I think "share a voice". We're clearly second rank in our industry, our share of voice is a bit similar, higher than our market share. Of course, it's difficult because we have lower market share in Big Media markets, like Germany, UK and France than we have in the Nordics or Russia. We don't really measure those markets, but I guess we are doing fine. But, most of our executives are really interested on these markets. So, we are a little bit oriented towards those markets: One thing we try and do is, we don't have manufacturing in Germany. So, we take particular care to support our German colleagues, not only from the NSMC, but also the Berlin office of Governmental Affairs with the same function as Sophie Glémet does in Paris. When they asked for something, we really try and deliver it to the European level, but also global level. In Russia, we've had one day of essentially only 20 Russian journalists, and we try and support them, as well. But it's true that we struggle to break through and, we're just not as big as Volkswagen, who got a lot of brands, a lot of CEOs, globally as well, and, in term of sizes in Europe, is much bigger. They have 23% share and they've always got something to say, because they got all these different brands at same time. Their coverage will be like 40-50% despite the crisis they had. We could say it is a negative share of voice, and they're getting the coverage. If they're getting the coverage, we are not getting coverage. It is not a "zero-sum" game, because it's the car industry, but then the Share of Voice is important. With this industry, the pie is growing, and it's very, very rare for us to get more than 5%. So, the big challenge is how do we cut through. But having said that, do we want to cut through? Because we don't have volume ambitions. In that sense, we want to grow sustainably, but we don't want 10% market share. That's what we want to do. Because if we wanted to do that, we would have to go into areas of the market probably we don't want to do from a profitability perspective. So, we will try and grow sustainably, and we need to follow that in terms of communication: Communicating Sustainability. We must change the way we communicate because we must communicate to different people.

For example, one of our big pushes are Fleet products. The fleet part of market is really increasing. We didn't have commercial vehicle offerings; now we have a relationship with PSA, on top of our pickups, which used to be segment leading, close to #1. And then we have the SUVs from PSA. It's a different audience. It's a different audience how to communicate to

those. So that's not really my job, I would say because that's more like the Product side who has a team as well. But it means that we try and support them to do their job. We have a lot of information, which is helpful, just helping them because these guys are in Sales, they're not in communication. We help them with their communications, because they don't have a communication function. I'm dealing with the Head of Fleets Products, he's a guy I work with in when I was in Sales. So, we have a personal relationship on top of the professional side, this kind of "matrix organization rotations" really help in terms of making links across the company.

We also know what's going on a little bit. We know what presentations top executives are giving. So, we can give insights, strategic insights to those departments that are not getting it for working level. Now, of course, the head of sales knows, but then, the guy who's a manager in the fleet team, he doesn't know that in two weeks, his boss is going to talk about this and that this event. We are very environmentally friendly company. So, we try and recycle our presentations and our messages as much as possible.

You might hear of Japan – UE EPA and all the advantages displayed by the European Commission and some business lobbies, but what are your thoughts on that? Do TME has an interest in this economic partnership agreement? If yes, in what areas?

We are, as a company, in favor of free trade. We think it's a huge benefit, we view the fact that we are global company today thanks to free trade agreements. So, we are supportive of the EU-Japan EPA, but honestly, we don't talk about it. Because, our philosophy is to make where we sell where it's competitive to do so. I mean, we say, we make ways to do so. But logically, if you're selling in the market, you're making in the market, you're reducing logistics costs. So, you're increasing your competitors. Of course, there are some markets, like Russia, where the infrastructure isn't all that. So, we are producing in Russia, but it's a very small percentage of our sales. But, you know, what has it changed for us? Nothing. I mean, for me, my personal view on this and view of many of my friends is that it's an exchange of cars for cheese.

I think the Japanese love cheese, or other cheese. And the reason that there was maybe pressure, from Japan was, the fact that the Koreans got a free trade deal. And then suddenly, you know, why are our cars like 10% more expensive and Korean cars? That doesn't make sense. Now, for us, it's not a big deal, because like I said, I mean, I think we produce like 70% of the cars that we sell in Europe. And you take company like Mazda, Honda, why do they want to leave the UK? Well, it's quite simple. They don't have economies of scale, they never have. If they want to have economies of scale, they should head back to Japan and export because there's no tariffs in and they have uncertainty: They know where the tariffs will be, but

they're going to come down. So, EPA has an impact. But the impact is on Mazda, Honda, who are essentially not localized. Nissan is and isn't localized. They have a big factory in Spain, but of course, they can use Renault factories. Mitsubishi have nothing in Europe. Of course, they are now part of Nissan alliance. But honestly, their volumes in Europe are not large enough: they sell as much in Europe, as we sell in France, for example. Honda has market share of ~20% of what we have, Mazda is probably like Honda. Suzuki, outside Hungary, they have no presence. So, it's much more value for them.

For us, honestly, it's not something we discuss, and we think about, I would say the only consideration is that possibly some components could be more interesting to bring from Japan (3% or 5% on components). But logistics is important. In terms of technology, sourcing technology in Europe, we're kind of antenna for some technology. At the margin. It's a positive for us, but in terms of our strategies, it had no impact. Technology is borderless: we're open to the connected. Toyota Connected, already exists in Japan, and we made a big strong advancement in Texas, near our North American headquarters when it moved. And we set up in Europe for two reasons. One is, that the market is the most advanced in Europe, in terms of mobility, ride sharing, car sharing, all these kinds of things way ahead of US. market We need to understand the market. And we need to support the market. So, in terms of data crunching, and stuff like that, honestly, this can be done anywhere. But you might as well have your people, your coders close to the market, so they can go and talk to the providers. So, it's about being in the right place, and why we choose London. Well, the reason we chose London, because as the highest per capita number of software engineers. London has the advantage of language. We have infrastructure there; we have good relations with government. And there's all these things were made after Brexit, even if it was not a factor. So, if Brexit is a hard Brexit and all the European software developers start leaving, we will leave. It's not like in the factory where we've invested 2.4 billion or 2.7 billion. So, it's a lot easier to move the office, and we are really following the talent. Other carmakers have different strategies, they're going to low cost locations where there's lots of engineers like Portugal, for example. Everybody has their own strategy. We have a big capacity and capability in North America, Japan, and we have offices in Middle East, offices in other areas of Southeast Asia. So, it was a logical set to open an office, but it's not huge (less than 50 people or something.)

Are you involved in in lobbies when it comes to these projects?

In terms of lobby, with the ACEA, for example, Jean-Yves is the guy, even if he's a real PR guy, that hates lobbying. We have also another guy who does it for us. I joined a lot of the ACEA meetings on communication, to make sure that we are aligned, because they have a

stance on certain stuff (hybrid, plugins, OIMs, CO2, etc.). We disagree with a lot of our same members on certain things. But on the other hand, there is a big value of having one industry voice. If we stand up as Toyota and say "this is our stance" then we've become a target. So, it is safer not to have a "company stance" on these stuffs. But, even though we're in a much better position than our competitors, we see the potential damage of such aggressive targets. And, we're very worried about it. But we're just good corporate citizen, so we're just going to get on with it. So, when ACEA stands, we are completely aligned with it.

When it comes to the Mobility Society strategy, do you think European and Japanese headquarters have the same objective?

I think with everything in life, and this is just like philosophy for new business, you must experiment. You experiment. If it works, you scale as fast as you can. If it doesn't work, you understand why it doesn't work, and you do something different than similar but different. So, the great thing about being global company with different regions is we have different environments. So, we can see what works in our markets. So, for example, Hybrid: we have gone from, almost nothing, almost 40,000 a year (when the third generation 2009 comes out) 10 years ago to 500,000 this year. So basically, over 10 years, we sell 10 times as much in simple terms. That is a lesson in a very diverse market, because some markets have incentives, other markets did not have. But the overall direction of the whole region is up, 50% is the whole of Europe, but part of Europe for us is Russia (low), Turkey (low) and Kazakhstan (low).

So, what happens when we get people from Indonesia, Australia, even from America who ask us about what did we do? We tell them about the hybrid story, because they want to do the same in their market. Now, what you do in steps is the same, but what you do is different. Because the market is different, the customer is different, the taxation is different on some things, but there are things that you can learn.

Annexe 26

Monika Wojcik-Kozicka

Human Resources Manager of Organization & People Development

Toyota Motor Europe

Brussels, May 21th, 2019 – Time 50:58

What is your academic background and How did you arrive at that position?

My name is Monika Wojcik Kozicka. I come from Poland, I graduated from Technical University of Łódź. During my study, I had the opportunity to go for overseas exchange program to Osaka University. I had also, technical background and interest in Japanese companies in general. And when I was studying there, I decided to, for six months of my exchange program that I was there, to also do the kind of study and preparation for my master thesis, which was also related to Japanese companies, but I was focusing on their corporate governance that is quite unique in Japanese companies. And it's kind of started my journey and interest also, to the Japanese companies like Toyota to understand, how these companies on, one hand are very traditional, and on the other hand, are very successful and always able to adapt to the different business circumstances, different markets that they operate on, etc. So, after my master's studies, I graduated, I got the job offer from Toyota Motor Corporation in their graduate program. This is still problem that exists in many Japanese companies, where they basically take freshman from the universities, and, then they start a lifelong career there. In Europe, of course, we have a mix of hiring experienced people and undergraduate but also, we offer that kind of opportunity for young talent in Europe. So, I had the opportunity to join that program in TMC. And this is an interesting program, of course, everyone has a different university background. But then still, during this process, you learn things about the company. Then the final decision is made also to which division you going to work for. So, it's not that when, you are applying for a job as a graduate, that your actual job is already defined, etc. This still happens throughout the graduate development.

So, I joined the Human Resources department, after I finished the company introduction called "onboarding process". And in my eight years into Toyota Motor Corporation, I have reported to three different teams. All my activities that I was involved in were for TMC activities for overseas support. So, either it was international mobility of people, how we develop the

resources overseas, to kind of keep the balance of knowledge skills that are required in global Toyota. And I also had an opportunity to manage the global labor relations during their peak period of a crisis (2009-2010). Many companies of course, were in a difficult financial situation, including Toyota, and the quality crisis was part of the timing, so I had an opportunity to experience how we manage that kind of crisis situations from the global headquarter. Then it was a time for me when I felt that I learned quite a lot about the company, its way of working in the global headquarters, and it was a good timing to go back to Europe, which was still the continent that I think I wanted to continue my career. Then I was looking for opportunities to work in this regional headquarter, and I joined the HR department.

Graduate program is typically around 18 months, and that's typically the opportunity when you get a chance to work on the line. It's still quite, a traditional way of many Japanese companies to give opportunity for people to visit the shop floor, but it's not really visits. You become basically part of the team and you experience the TPS principles firsthand. Also you understand the core of the business, how vehicles are built and how much effort has to be poured in the engineering and manufacturing pies, how complex these operations are, and also how dependent we are on the good relationship with the people on the shop floor, to really build the quality and have a sustainable production line.

What is your mission? And what is your responsibility towards your team and what are your main projects?

We are 80 people for the whole European HR team. My team itself is currently 12 people, and I report to the executive level.

In Human Resources, people have different development paths. Some people really prefer, especially in Europe, to have more expertise in one area and go maybe narrower, deeper. Then you have those people who emphasize the importance of getting a broad HR experience, so then after between three, five years in one area, you move to another area. Of course, what makes a difference, the Toyota Motor Corporation in Japan has a big HR department. So, it means that doing very narrow, very deep activities typically, takes quite some time to have a broad understanding of what different HR teams are doing. Because you know, companies, you have the business units that typically have the business partners around those. It is a very particular way for HR people to go to the business to support frontline HR operation within that business unit. This is a "rotation element" that is quite common in Japan, also in Europe, but the duration and frequency of that is probably less than in Japan.

When I oversaw, for example, international mobility, it was about, how many people in which areas we come and develop them in the global headquarter? Because this is still, the best way to transfer the knowledge. How many people also we are sending overseas because we want to also onsite support your operation with, with the people coming from the headquarter.

I'm more representing the middle management layer. But I would say, in that aspect Toyota is quite unique because, on all levels of the organization, we encourage people to be able to take decisions. I consider, all the levels in the company have the decision-making power. I have to say that being in the middle manager position, your HR executive team, quite often depend on the expertise that you have in the area to make the proposals of a decision. If this is something depending on the impact, of course, they want to be involved in the decision-making process. But they rely on, certain options, proposals to be also put on the table from the people below.

I would maybe explain two aspects: In the area over learning and development, in Toyota, we take care of two elements. First, is the development of our corporate DNA, typically training, in-house programs, where people who join the company, and can learn and practice Toyota ways of working. So, it's the common knowledge of what is the Toyota Way into the daily practices, like the process of doing a PDCA, to take an action on your projects, putting in place the "Kaizen" Continuous improvement ideas, how to actually do a Nemawashi process (a standing with the stakeholders, where your idea come up with the right decision, right changes in the company), and also how to structure your communication, because we are working in the global company with so many different cultures, and especially, that Japanese language that is a very visual language, at the difference from the Western world, where many companies still operate with the executive summary.

In Japan, we try to have, a logical communication style with limited words, but more visuals, either by graphs that represents the data, and just one box that says it's a conclusion of that. But we really try to make sure that it can be understood in the same way, by a Japanese person, or by a French, Spanish, or a North America executive. And, what is interesting, this corporate training and development is common across the world. So, when you have a global meeting of people from Toyota, we speak common language, which is "Common language for Toyota only". But it really means to our executive when we invite them, to the room to discuss something, it only takes 10 minutes for them to understand, where we are with the current analysis of the situation, and then, what is our proposal because there is not many papers, also, not so much PowerPoint slides, because, the PowerPoint has this disadvantage of this connection your storyline. So, we really try to make sure people can make this concise story to make sure no matter of what nationality, people can quickly grasp, and we can come up

with the decision or advice in a short period of time. So, this is one big element of the learning and development in Toyota. The second is, of course, more tailored to individual needs, in terms of what can enough knowledge, skills or competencies they need to develop. So, something more generic that can be basically part of any company learning and development curriculum.

Do you encounter Japanese counterparts in the projects you are handling? How do you work with them or the others regional colleagues?

Yes, we could say that there is a mother department. But it's less and less coordinating, because Toyota in overseas have already mature. We have the knowledge, the right understanding, Toyota ways of working in HR as well. So, we collaborate more on the best practice sharing understand, what are your challenges, what are the things that we can work together, common goal, to have an optimization rather than each of the team working on these things separately. So, we can have a working group and do certain things together. But there a few things where HR that will consult them on, like governance structure. And there are things where we will not consult you to, but just inform you after the implementation. So, when it comes to communicate with a Japanese counterpart, basically, it's all about making sure the governance policy is well known, and well followed by any department of each regional headquarters; practice showing, also because at the end of the day, whenever we have meetings with participants from across the company, what we basically see is similar challenges, even though we work in very different environments.

You talked earlier about the corporate DNA. “The Guiding Principles of Toyota”, “Code of conduct”, “The Toyota Way”, ”Genchi Genbutsu”, “Jidoka”, “Hoshin Kanri”, “Being a mobility society, Toyota Business Practices Activities”: These are the tools TMC to share its vision on a global scale: What does it mean to you? Do you apply any of these items into your department?

Definitely. All these elements are the kind of mindset and then it's depending on the project on the things that you do. Even in the HR area, if we plan our objectives for the year, we apply the aspect of "Heijunka". What it means is that, in the production line, if you have 5 cars, and depending on the specs of the vehicle, it might take 60 seconds to build 4 of them, and then it might take only 50 seconds for their fifth vehicle. So, it means that, somehow you want to make sure that you have not only the cars that needs 60 seconds, if your production line is 59 seconds, but then you try to spread it evenly. And it's the same with the operational activities

in the office area, that also try to implement projects and spread them evenly across the year as much as possible, to be able to accord and not to overload people with the activities. Then, of course, we have the KPIs, which is the element of visualization if we have any problems. It could be financial aspects, or it could be in terms of the resources, accuracy of things. We build a formula that help us indicate our average absentees, and now, for the last three months we are going up. So, this is that something that, again, comes from the TPS, this kind of visualization, we call it me it okay. And the wording from Japanese is to make things visible. So again, that management who walks by and see the board with those KPIs, and stress quickly, what is the situation in any places. So, we try to not make the differentiation, we really see those Toyota principles applied to all sides of the business. But of course, the way you apply it different. So when we educate people, we try to make sure we bring the examples from across the company, so that it really speaks to people who come from the external world to really realize these are not things that are written only in the book about Toyota, but these are really the things that can be practice on a daily basis. Across the globe, we have also relatively small companies were also the management in there has not been with Toyota for a long time, and they have a lot of external experience, and they might not have full opportunity to grasp this DNA of the company, if they have been there for a short period of time. So, we try to promote the International Mobility Program, give people opportunities to work, for example, any global headquarter or regional headquarter, where these principles are well understood, and more frequently practice. So that this people can take away and, deploy these principles in their own affiliate business area.

In terms of Mobility Society Strategy, we must support organization because these are the business strategic project. So, we would have a discussion with the business, like how we want this organization to be established, is it a team within the your current organization consisting of people from the same or different departments working together on this mobility activities, or a joint-venture outside the organization because we also want to have expertise coming from the market on that. We really try, from organizational perspective, to discuss how it is best to establish certain units. Also in terms of understanding the skills and competencies that are required, is it something that we already have in-house, the talent that we will have to attract from the market, or also, because we see this bigger needs in the future, also within the organization, how we should also deploy risky people within the organization to understand, the fuel cell technology, etc. So, these are the things that typically, even though it might sound business strategy, it's HR that needs to also support to make it happen.

Talking about the corporate DNA when it comes to in-house program. Is there any similarities or differences with the graduate program within the Global Headquarters?

I must admit that probably there are quite some differences. In the graduate in Japan, when they join, they are part of a pool of people who we're in the onboarding process, not already assigned to a specific function. While graduated, we are hiring in Europe, we are hiring upfront from a specific job for a specific department. So, we really look for profile of people who have studied these things, maybe in the university had some internship or already experience. So we are more driven, where the individual wants to work, you know, and apply for a job, where it's not necessarily the case in the Japanese companies, because they look for a generalist who have a really good overall competencies and can work across in different areas of the business. I would say that's one difference. Probably we are in Europe, still more short-term oriented, which means we already make this people from start working on the daily activities and allow them to join on-the-job progress. They will go to work, for example, for six weeks, then they return, they go for retail training, to also be on a side of the company as a dealer, see how the sales process looks like, either in a traditional way in the dealer, or more now in an innovative way, using a mobility solution of Toyota, etc.

For our graduates in the 18 months of a program, they have much more hands-on experience already on a particular job. We're in the Japanese company, like TMC, they really give you the time of the 18 months more to learn the culture, the ways of working without merely already expectation on the specific job, because it's really focused on the learning and should be the learning. And in Europe, it's, learning but also combined already with some visible outcome of the job of those individuals. Because for us in Europe, there is also an opportunity to see how that person fits in the culture and should stay with the company longer or, we will decide to, not to continue the career with that person, because he has not met the expectations. People who come from a graduate program in Europe will have already much more hands on job experience. But as I said, it's linked probably, to the fact that we want the people to apply for a particular job, and they will be working on certain tasks already from the day one, where, typically, in the Japanese companies, once you sign your contract until your retirement for many cases, unless the people also decide to leave. In Toyota Motor Europe, we want to make sure that these people can be also successful in the long run, to see themselves feeling they can fit into that kind of ways of working or prefer to also work outside.

How does your department work and communicate with the other support and primary departments?

Financial department, HR department will be the supportive functions for the business. There are two roles for HR: we have the aspect that we need to support the company and the business. It means deciding in what kind of structure the company will operate, how many

layers of management staff, what kind of succession plans, career plans do we need, do we want to meet short-term or mid-term goals of the company. And on the other hand, the aspects of people as individuals, meaning, how we can evaluate the individual performance, competency level, how we can also provide proper information about all the benefits that we provide as a company; and also, all of the questions related to holidays, insurances, etc.

HR is really like that frontline to the employee, but also frontline to the business. And I think what probably makes also HR in Toyota different than in other companies that I had the opportunity to benchmark with is that we have quite some strategy and responsibility. In many companies, HR is only seen like a personnel management, division, or typically, that element of Personnel Management, something that we already outsource. We are using outsourced companies to do payroll of the employees or to facilitate management, etc. And we try to really focus on more planning, strategic planning of our activities, to support the business. It could be about the kind of talent we want to keep in-house, what kind of skills we want our people to have, what balance we want to keep of our permanent people versus our contingent workforce. These are really many strategic topics that we had an opportunity to work on. Of course, some element of operational as well, because there's always even when you're in a support function but keeping the balance between work on the strategic activities and HR daily support.

Can we implement our own strategy as HR department? I would say, the expectation probably is that we will stand with the business there, what is the situation today, where the business wants to go, and then HR to propose this strategy. These are the five strategy things that we want to work on, agree with the functional management, and then have specific actions that we will typically ask them to cascade or lead in their own area. It's not like we will go on the daily basis, to deploy HR processes, we will design them, we will involve the management of the functions in, but then we will give it in the hands of them to actually manage for their own business unit.

How do you measure that individual performance in HR: Unit of analysis? Document (charter, rules of procedure)? And are they available to public?

We have put many measurement tools in place. One will be what we call "employee motivation survey" in which we have actually some number of standard questions that in every Toyota affiliate, will be asking to our employees, to be also able to compare how different entities are doing in terms of engagement, motivation, understanding what are the success factors (the evolution learn from the best practices of others). But also, something which is more like pulse survey that ask people for their feedback, after we make some strategic changes, that we

typically would have a small pilot (this is what we want to do, we would try it, for example, with a small population, gather the feedback from that small population to improve it before we have a mass rollout of the activity). Then part of what we call a PDCA cycle. As part of "check process", we would still be asking them from time to time people do not provide us the feedback, because we also see, over a period, the reality in the business must be changing. And we just need to be able adapt our systems based on their feedback from people.

These tools are only shared internally. Of course, we try to share with the company on the right level of people. If a team provides the survey results, then the manager can see the result for his team, and is sharing the results with the team, but not necessarily showing the results of other teams. So typically, we share first companywide results. And we share, departmental level, and then we share the team level results. We really try to, again, give it back to the people who have the impact on that level of activities.

Are you in connection with others HR department from automotive actors in Europe and do you share experiences/practices?

Because of the competition law, we must be very careful of what we are sharing with other Original Equipment Manufacturers (OEM). We try to network with them, to exchange with them. We have some, common areas of interest, probably comparing, challenges that we have in terms of engineering, talent, attraction, or gender diversity activity, but I would say this is typically through a network of people that you know, from conferences. We would like to have an anonymous benchmarking, so that everyone provides the information, what they are doing without sharing the names. We try to cooperate, of course, within the boundaries of what the competition law allows us to do. And it's really for that purpose to have the benefit for everyone.

Annexe 27

Nœuds de Codage – Cas Toyota
NVivo12

TOYOTA

Codes

	Nom	
[-]	<input type="radio"/>	Entrée stratégique de la multinationale RAKUTEN INC en EUROPE
	<input type="radio"/>	La stratégie de RAKUTEN INC
	<input type="radio"/>	Stratégie centralisée par le siège global
	<input type="radio"/>	Stratégie décentralisée du siège global
	<input type="radio"/>	Au sein de la filiale locale
	<input type="radio"/>	Au sein du siège régional
	<input type="radio"/>	Stratégie en collaboration avec le siège global
[-]	<input type="radio"/>	La vision d'EMPOWERMENT d'une entreprise d'innovation global
	<input type="radio"/>	La vision d'EMPOWERMENT
	<input type="radio"/>	La vision est majoritairement influencée par son équipe fo ↔
	<input type="radio"/>	L'INNOVATION dans la stratégie de RAKUTEN
	<input type="radio"/>	Les pratiques organisationnelles de RAKUTEN INC
	<input type="radio"/>	RAKUTEN INC qui se veut être un marketplace pour ses p
	<input type="radio"/>	Principes et valeurs traditionnelles de RAKUTEN
	<input type="radio"/>	Concepts de marque (Brand Concepts)
	<input type="radio"/>	Evolution de OPTIMISME selon RAKUTEN INC
	<input type="radio"/>	Principes de réussite (Principles of Success)
[-]	<input type="radio"/>	RAKUTEN EUROPE créé dans une stratégie d'intégration
	<input type="radio"/>	Alliance stratégique
	<input type="radio"/>	Ex-nihilo
	<input type="radio"/>	Fusion-Acquisition
[-]	<input type="radio"/>	La structure de RAKUTEN EUROPE
	<input type="radio"/>	Composition du siège

Codes

<input type="checkbox"/>	Nom	<input type="checkbox"/>
<input type="checkbox"/>	<input type="radio"/> Effectif et Direction	
<input type="checkbox"/>	<input type="checkbox"/> Direction de la filiale	
	<input type="checkbox"/> Direction étrangère	
	<input type="checkbox"/> Direction locale	
	<input type="checkbox"/> Taille de la filiale	
<input type="checkbox"/>	<input type="radio"/> Les exigences de le demande sur la structure de la filiale	
	<input type="checkbox"/> Exigence en IR (twofold)	
<input type="checkbox"/>	<input type="checkbox"/> Exigences au niveau global	
	<input type="checkbox"/> Concurrence	
	<input type="checkbox"/> Marché	
<input type="checkbox"/>	<input type="checkbox"/> Exigences au niveau régional	
	<input type="checkbox"/> Concurrence	
	<input type="checkbox"/> Marché	
<input type="checkbox"/>	<input type="radio"/> Intégration des avantages de la multinationale	
	<input type="checkbox"/> Internationalisation	
	<input type="checkbox"/> Localisation	
	<input type="checkbox"/> Propriété	
<input type="checkbox"/>	<input type="radio"/> Le type de relations (institutionnelles) que l'organisation a	
	<input type="checkbox"/> Au niveau global	
	<input type="checkbox"/> Au niveau local	
	<input type="checkbox"/> Au niveau régional	
<input type="checkbox"/>	<input type="radio"/> Le type de relations que la filiale entretient avec sa maison-mère	
<input type="checkbox"/>	<input type="radio"/> Actions de la filiale dans le groupe multinationale	

Codes

+	Nom	↔
	<input type="radio"/> En réseau (Intégration globale & Réactivité locale)	
	<input type="radio"/> Pour la demande globale	
<input type="checkbox"/>	<input type="radio"/> Pour la demande locale	
	<input type="radio"/> Exclusivement locale	
	<input type="radio"/> Inclusivement régionale	
<input type="checkbox"/>	<input type="radio"/> Rôle du siège sur la filiale (à revoir)	
	<input type="radio"/> Relations de coordination et coopération	
	<input type="radio"/> Relations formelles avec la filiale	
	<input type="radio"/> Relations informelles avec la filiale	
<input type="checkbox"/>	<input type="radio"/> Les Managers chez RAKUTEN EUROPE	
<input type="checkbox"/>	<input type="radio"/> Historique de l'interviewé	
	<input type="radio"/> Nationalité	
	<input type="radio"/> son parcours académique	
<input type="checkbox"/>	<input type="radio"/> son parcours professionnel	
	<input type="radio"/> au sein de l'organisation d'accueil	
	<input type="radio"/> en dehors de l'organisation d'accueil	
<input type="checkbox"/>	<input type="radio"/> Initiatives du manager au sein de la multinationale	
	<input type="radio"/> prises pour le développement global (externes) ↔	
	<input type="radio"/> prises pour le développement régional ou local (internes) ↔	
<input type="checkbox"/>	<input type="radio"/> La position du manager dans l'organisation	
	<input type="radio"/> Le manager a d'autres rôles au sein de son organisation	
	<input type="radio"/> Relation avec hiérarchie inférieure	
	<input type="radio"/> Relation avec la hiérarchie supérieure	
	<input type="radio"/> Son rôle principal au sein de l'organisation	

Codes

+	Nom	↔
-	<input type="radio"/> Perception personnelle du manager sur les éléments de l'organisa	
	<input type="radio"/> Comment il comprend la vision d'EMPOWERMENT	
	<input type="radio"/> Comment il comprend les principes de la multinationale	
	<input type="radio"/> Comment il comprend son rôle au sein de RAKUTEN	
	<input type="radio"/> Il a conscience du positionnement de l'organisation	

Annexe 28
Toyota Code of Conduct

TOYOTA



TOYOTA CODE OF CONDUCT

September, 2018

TOYOTA MOTOR CORPORATION

Guiding Principles at Toyota

1. Honor the language and spirit of the law of every nation and undertake open and fair corporate activities to be a good corporate citizen of the world.
2. Respect the culture and customs of every nation and contribute to economic and social development through corporate activities in the communities.
3. Dedicate ourselves to providing clean and safe products and to enhancing the quality of life everywhere through all our activities.
4. Create and develop advanced technologies and provide outstanding products and services that fulfill the needs of customers worldwide.
5. Foster a corporate culture that enhances individual creativity and teamwork value, while honoring mutual trust and respect between labor and management.
6. Pursue growth in harmony with the global community through innovative management.
7. Work with business partners in research and creation to achieve stable, long-term growth and mutual benefits, while keeping ourselves open to new partnerships.

(revised April 1997)

Foreword

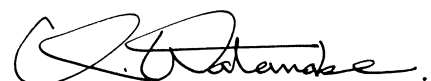
Ever since the company was founded in 1937, we, TOYOTA MOTOR CORPORATION and our subsidiaries (“**TOYOTA**”), have continuously strived to contribute to the sustainable development of society and the earth through the manufacturing and provision of high-quality and innovative products and services. Through these continuous efforts, we have established a corporate philosophy that has been passed down from generation to generation throughout the company and which has come to be known as the “**Guiding Principles at Toyota**” (originally issued in 1992, revised in 1997; the “**Guiding Principles**”). We have also put TOYOTA’s values and methods in written form, in the “**Toyota Way**” (issued in 2001). Such values and methods must be shared globally among us to realize the “Guiding Principles”, and we are seeking to pass these on to future generations. Through these efforts and by passing down our corporate philosophy and our values and methods, we are steadfastly striving to realize the “creation of a prosperous society by making things”.

TOYOTA has long-demonstrated its dedication to contributing to sustainable development. As our business operations have become increasingly global, we need to reconfirm our corporate philosophy and have issued an explanatory paper in January 2005 entitled “**Contribution towards Sustainable Development**”. This paper interprets the Guiding Principles from the standpoint of how TOYOTA can work toward sustainable development in its interactions with its stakeholders.

We believe that by **implementing the Guiding Principles in our operation, TOYOTA will successfully fulfill its expected contribution towards sustainable development**. Therefore, as stated in the Guiding Principles and explanatory paper, **we must comply with local, national and international laws and regulations, including the spirit thereof, and act with humility, honesty and integrity**. Compared to when the “Code of Conduct for Toyota Employees” was first issued in 1998, TOYOTA’s presence in society has greatly increased and also new laws and regulations have been established, such as for the protection of personal data. With this background in mind, we have revised the existing code of conduct and created the “**Toyota Code of Conduct**” in order to **communicate the fundamental approach necessary to inspire continued confidence in TOYOTA, to respect and comply with the laws, and to maintain our honesty and integrity**.

I would particularly like to ask each one of you, as a person working for TOYOTA, to **be aware that you are an essential contributor to the success of TOYOTA**. In this era of global competition, borderless trade, and diversification, TOYOTA wishes to conduct business in an open and fair way. TOYOTA aims to become the most valued, respected and trusted company in the world by its customers and society. Accomplishing this goal requires that each one of us is aware of TOYOTA’s respected reputation and standing in the community, the gratitude we owe to our customers and society, and the necessary respect of laws and regulations. Therefore, we must each act in a “**steadfast, sure-footed, and thorough**” way, and in accordance with common sense and good judgment. I expect and ask you to carefully read this “**Toyota Code of Conduct**” and to implement the spirit within.

March, 2006



PRESIDENT
TOYOTA MOTOR CORPORATION

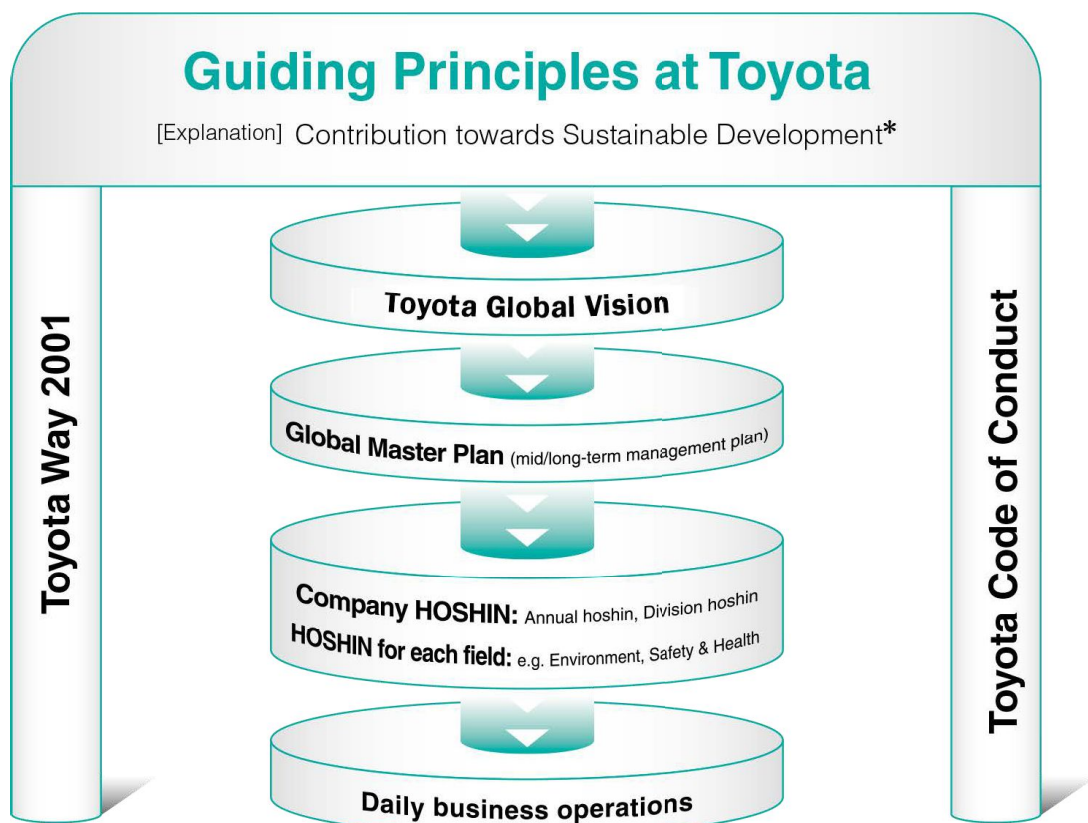
What is the “Toyota Code of Conduct”?

Our daily business operations are built on and supported by the corporate philosophy and its values and methods that have developed through years of diligent effort and passed down from generation to generation throughout TOYOTA MOTOR CORPORATION and its subsidiaries (“TOYOTA”).

The “Guiding Principles at Toyota” (originally issued in 1992, revised in 1997) summarize the corporate philosophy and reflects TOYOTA’s vision of what kind of company TOYOTA would like to be. The “Guiding Principles at Toyota” were created with the expectation that we would understand and share our fundamental management principles, and that we would contribute to society by referring to these principles.

The “Toyota Way” and the “Toyota Code of Conduct” serve as important guiding tools when implementing our daily business operations to realize the “Guiding Principles at Toyota”. “Toyota Way” (issued in 2001) describes the values and methods to be shared for the people of the global TOYOTA organization.

The present “Toyota Code of Conduct” (originally issued in 1998, revised in 2006) seeks to provide a basic code of conduct and to serve as a model and compass. It also provides detailed explanations and examples of the actions and issues that we must be aware of when carrying out actual business activities (including in our jobs and daily business operations) and living in our global society.



*Interprets the “Guiding Principles at Toyota” from the standpoint of how TOYOTA can work towards sustainable development in its interactions with its stakeholders (Issued in January 2005).

Toyota Code of Conduct

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CHAPTER I

TOYOTA AND US

Through our communication and dialogue with the company, we (people working for TOYOTA) strive to build and share fundamental value of “Mutual Trust and Mutual Responsibility”. TOYOTA (TOYOTA MOTOR CORPORATION and its subsidiaries) endeavors to improve its business achievements so that TOYOTA can continue to provide employment and fair and stable working conditions for each of us. Simultaneously, TOYOTA promotes a work environment in which each of us can work in harmonious and dynamic manner.

In return, **each of us implement the “Toyota Code of Conduct” and endeavor to fulfill our duties with integrity. By fully utilizing our ability and capabilities and cooperating with others working for TOYOTA, we continue to improve the business performance of TOYOTA.**

This Chapter I explains the values and principles that are the foundation of our relationship with TOYOTA.

1 —1. **Creating a Harmonious and Lively Work Environment** *- Acting with integrity and in line with sound social norms -*

TOYOTA will use its best efforts to comply with all labor and employment laws and regulations of the countries where it is active, as well as the spirit thereof. TOYOTA encourages and supports the personal growth of all people working for TOYOTA.

Based on “Mutual Trust and Mutual Responsibility”, TOYOTA endeavors to improve its business performance in order to make it possible to provide equal employment opportunities and to maintain fair and stable working conditions. TOYOTA strives to create a safe and harmonious work environment for its employees.

TOYOTA respects and honors the rights of all people working for it and will not discriminate against them or permit the infringement of their rights.

Therefore, all of us must recognize our essential roles in contributing to the success of TOYOTA and should make a commitment to comply with internal rules, as well as conduct our duties/work with integrity and in a socially acceptable manner. As valuable contributors to TOYOTA, we should each also endeavor to fully utilize our capabilities and to put forth our best efforts in all matters in order to strengthen and build TOYOTA’s business performance globally.

[Guiding Principles 1 and 5]

CHAPTER II

OUR ACTIVITIES IN THE COMPANY

Based on a philosophy of “Customer First”, TOYOTA strives to provide attractive products and services that meet the needs of customers worldwide. TOYOTA also seeks to achieve the top-level world standard in environmental protection and safety measures. In these regard, TOYOTA is unfolding daring plans both domestically and abroad concerning environment and safety, and in relation to research, development, procurement, production, distribution, sales and services.

When carrying out our work, each of us should all be aware that our work is linked to all of the business activities of the company. In this regard, TOYOTA does not tolerate illegal or criminal acts or acts in violation of the company policy and rules, regardless of whether such acts were motivated “in the interests of the company” or “in the interests of the customer”. We should comply with the law and should always act with awareness and responsibility. We should rise to the challenge of solving the many issues that arise, as customer needs diversify and as progress is made in TOYOTA’s globalization, such as mastering of the world’s most advanced technologies, establishing the world’s most suitable procurement and supply networks, meeting environmental and safety standards, and improving customer satisfaction.

This Chapter II explains how we should contribute to each of the major business activities of TOYOTA and provides the points that we should all be aware of.

2 –1. Compliance with Laws and Regulations - *With sound social norms in mind* -

TOYOTA will comply with applicable laws, internal company policies and rules, abide by sound social norms, and take appropriate action against any illegal or criminal acts or acts in violation of the company's policies and rules. TOYOTA will not make any exceptions to this commitment, regardless of whether an unlawful act is motivated "in the interests of the company" or "in the interests of the customer", or carried out under the instructions of one's superior.

We should implement the "Toyota Code of Conduct" and make a commitment to comply with applicable laws, as well as internal company policies and rules, and to abide by sound social norms in all aspects of our work.

[Guiding Principles 1 and 2]

2 –2. Use and Management of Assets and Confidential Matters - *Ensuring asset maintenance and confidentiality management* -

TOYOTA possesses a wide variety of tangible*¹ and intangible*² assets that are indispensable and invaluable to its successful business operations. In order for TOYOTA to use such assets effectively and at any time during the course of its business activities, TOYOTA manages such assets with a firm hand in order to prevent such assets from being lost, stolen or used illegally or wrongfully.

TOYOTA endeavors to manage and protect confidential information (e.g., its trade secrets) and to use such information in an appropriate manner. At the same time, TOYOTA does not tolerate the illegal use of another party's assets or intellectual property or the unauthorized use of another party's confidential information.

We must manage and protect TOYOTA's assets, intellectual property, company secrets (such as trade secrets etc.) and personal information, as well as respect the assets, intellectual property and confidential information of others.

[Guiding Principles 1]

*1 Examples of tangible assets: Land, buildings, facilities, equipment; products, merchandise, materials; office equipment; networks; office supplies; cash and deposits, securities and bonds; corporate credit card, etc.

*2 Examples of intangible assets: Intellectual property rights such as patent rights, trademarks, copyrights, design rights, know-how etc.; Confidential corporate matters such as product and technology information, procurement and sales information, personnel and accounting information, software (e.g. program, data), etc.

2 –3. **Insider Trading** *- Act as an investor with sound common sense -*

TOYOTA possesses a large amount of valuable internal (confidential) information and does not allow people working for it to engage in insider trading, such as using confidential information to buy and/or sell stocks.

We must understand that insider trading is clearly not permitted. Not only is it illegal in many countries, but it also destroys the mutual trust that TOYOTA has built with its investors, affiliated companies and business partners. Therefore, we shall not engage in or permit any insider trading.

[Guiding Principles 1]

2 –4. **Activities Promoting Safety** *- Enhancing vehicle safety -*

For an automotive manufacturing company such as TOYOTA, the pursuit of safer vehicles is always one of its main challenges and mission. TOYOTA endeavors as a group, in cooperation with our suppliers and dealers, to engage in research and development, design, production, quality control and after-sales services in order to deliver its customers Toyota and/or Lexus vehicles that display sophisticated safety levels under various conditions and that provide a comfortable experience for drivers. TOYOTA will also be actively involved with “People Education” (i.e., Driver Education) and with improving the “Traffic Environment.”

We should endeavor to think from the standpoint of our customers and pursue ways to make vehicles safer and offer our customers safety and trust.

[Guiding Principles 3]

2 –5. **Environmental Preservation Activities** *- Building environmentally and people friendly vehicles -*

TOYOTA has a deep understanding of the necessity of environmental conservation on a global scale. Therefore, TOYOTA has decided to “dedicate ourselves to providing clean and safe products and to enhancing the quality of life everywhere through all our activities” (Guiding Principles 3). Furthermore, TOYOTA has developed a proactive policy and plans to assure continual improvements in environmental performance in the “Toyota Earth Charter” and “Toyota Environmental Action Plan”.

TOYOTA regards environmental issues as one of the company’s major challenges and takes environmental impact into consideration at all life-cycle stages of its vehicles, including development, production, usage and disposal. TOYOTA promotes compliance with international environmental standards, implementation of enhanced environmental assessments, and realizing the principle of “building people and environmentally friendly vehicles” in cooperation with its suppliers, dealers, etc.

We must endeavor to attain the highest level of environmental stewardship in each country and area.

[Guiding Principles 3]

2 –6. **Research and Development Activities** - *Developing vehicles from the standpoint of our customers* -

In order to provide innovative, safe and outstanding high-quality products and services that meet the needs of customers through “research and innovation”, TOYOTA has established research and development centers around the world. These centers are well-staffed with leading innovators and actively cooperate with other TOYOTA group companies, as well as universities and research institutes, in order to strongly promote research and development of advanced technologies in various fields.

TOYOTA does not tolerate research and development that violates any applicable laws or breaches of its agreements with its research and development partners. TOYOTA also does not tolerate the illegal or unauthorized use of another party’s intellectual property.

Our goal is to develop vehicles from the customers’ perspective and to promote research and development.

We respect the views of our research and development partners and seek to cultivate and maintain mutual trust. In addition, we use our best efforts to build a relationship of mutual trust by satisfying our obligations to our partners.

We shall be mindful of respecting the intellectual property rights of others when conducting research and development and when realizing production.

[Guiding Principles 4]

2 –7. **Procurement Activities** - *Reasonable and sincere transactions* -

Based on following three basic policies, TOYOTA engages in fair and open procurement activities:

(a) Fair competition based on an open-door policy

Regardless of nationality or size of transaction, TOYOTA offers fair opportunities to all candidates. TOYOTA evaluates candidates based on their overall strengths, including quality, technology, price, volume and reliability of delivery, as well as the stability of their business management and technological development capabilities.

(b) Mutual growth based on mutual trust

In order to build relationships that result in mutual growth, TOYOTA and its suppliers strive for mutual collaboration and close communications as equal partners.

(c) Promoting localization in view of good corporate citizenship

In order to contribute to its local communities, TOYOTA globally promotes local production of Toyota and/or Lexus vehicles and endeavors to actively promote local procurement of parts and materials.

We engage in procurement activities with fairness and integrity, in consideration of the above three basic policies and compliance with the law.

[Guiding Principles 1 and 7]

2 –8. **Production and Distribution Activities** *- Building vehicles that win customer trust and faith -*

TOYOTA endeavors to produce high-quality Toyota and Lexus vehicles and parts and deliver them in an efficient manner in order to meet customers' expectations. In order to realize such production and supply goals, TOYOTA endeavors to build the “world's optimum production network” and a “global distribution network”.

In addition, in order to enhance the global competitiveness of Toyota and Lexus vehicles, TOYOTA developed the Toyota Production System, which continues to evolve according to the characteristics of particular regions of the world and aims to achieve worker and environmentally friendly plants.

We endeavor to maintain the safety and quality of products and to comply with laws related to production and distribution.

[Guiding Principles 4]

2 –9. **Sales Activities** *- Winning the trust of customers and dealers -*

Based on the following three ideas, TOYOTA strives to build a sales and service structure that meets various customer needs in a timely manner. In order to achieve such structure, TOYOTA endeavors to build relationships with dealers based on mutual trust, and to bring mutual growth and support for fair competition and transactions.

(a) Philosophy of “Customer First”

Based on a “Customer First” philosophy, TOYOTA strives to create a sale and service structure that promptly responds to the various needs of customers worldwide. To achieve this, TOYOTA develops products that meet customer expectations and implements a marketing strategy and sales style that matches the product profiles and various customer needs.

(b) Mutual growth based on mutual trust

TOYOTA develops and provides attractive product lineups, various styles of dealer showrooms and sales styles, and a meticulous customer and revenue management system. TOYOTA does this to contribute to the improvement of sales efficiency and profitability of its dedicated dealers, to build mutual trust and to bring mutual growth.

(c) Importance of fair market competition

TOYOTA respects free trade and market competition, implements ambitious sales strategies in order to obtain customer satisfaction and support in various areas of the world, and endeavors to engage in fair competition and transactions.

We conduct our sales activities with the above ideas in mind.

[Guiding Principles 1 and 4]

2 –10. **Overseas Business Activities** - *To become a global company trusted worldwide* -

TOYOTA engages in business worldwide and many of its activities are conducted outside Japan, including not only manufacturing activities, but also research and development. TOYOTA recognizes the ever-changing environment surrounding its business operations, global diversity, the specificity of each local area in terms of its own rules and customs, etc., and the rapid changes in world political and economic climate. TOYOTA respects international rules and laws, as well as the culture, customs and history of local societies. Thus, TOYOTA promotes its business activities from “both a global and local” standpoint so as to contribute to the development of local economies and society.

We contribute to expansion of TOYOTA’s business overseas by respecting the culture, customs and history of each country, as well as national, regional and international laws and rules.

[Guiding Principles 1 and 2]

2 –11. **Profitability Enhancement Activities** - *Building a stronger profit foundation* -

In order to respond to the expectations of investors and society, TOYOTA endeavors to perform various measures to improve business management efficiency, achieve sustainable increases in profit and strengthen the foundation of its management and profit.

When determining investments or financing for various domestic and overseas projects, TOYOTA’s decisions are made after conducting thorough pre-studies, including anticipated profitability. As for fund management, TOYOTA places the highest priority on safety and certainty.

Based on the appropriate financial performance indices, TOYOTA assesses business management efficiency and profit make-up on both an individual and consolidated basis. TOYOTA does its best to continuously improve these, and to timely and fair disclosure of its financial condition and to make appropriate payment of taxes. In order to realize such disclosure, TOYOTA strives to appropriately oversee the financial condition of its subsidiaries and affiliates.

[Guiding Principles 6]

CHAPTER III

SOCIETY AND US

Through its business, TOYOTA creates close relationships with society and its stakeholders (customers, shareholders, local communities, etc.). Based on the basic understanding that “as a member of society, the company engages in business that contributes to society”, TOYOTA operates its business in an open and fair manner. Through active public relations activities, investor relations and philanthropy, TOYOTA aims to be a “good corporate citizen” that is trusted by the international community. TOYOTA’s business is expanding rapidly worldwide. TOYOTA feels that the support and trust of stakeholders in TOYOTA has helped the company realize such expansion, and TOYOTA should not forget gratitude towards its stakeholders.

Thus, TOYOTA will respond strictly with respect to illegal or criminal acts and acts that are not socially acceptable, regardless of whether job-related or whether in private situation. TOYOTA also strongly desires that the people working for TOYOTA, a company engaged in automotive business, are aware of traffic safety and lead safe and pleasant lives.

We support TOYOTA’s aim “to become ‘a good corporate citizen’ that is trusted by the international community”. We strive to communicate openly and fairly with stakeholders, to gain more “Toyota fans”, as well as to engage in activities that contribute to society’s sustainable development. We must also act, at all times, including when carrying out our works, in a manner that does not provoke unnecessary misunderstanding or misapprehensions, and to act with humility, honesty, and integrity.

Regardless of whether at work or in a private situation, **we should pay careful attention to traffic safety, obtain basic legal knowledge, and be aware of common social protocol.** We need to do this so that we can be sensitive to illegal or criminal acts or acts that are against society’s common morals, **and take swift and forceful actions against such acts.**

This Chapter III introduces examples of TOYOTA’s engagement with society and provides issues that we should be aware of, and what TOYOTA expects of us when engaging in social activities.

3 —1. **Corporate Communication Activities** - *Communicating facts in an accurate and timely fashion* - - *Being Open and Fair* -

In order to become an “open company” and win the trust of society, TOYOTA strives to communicate accurate and timely information to its stakeholders through active public relations and public dialogue, so as to enhance its corporate image and transparency. TOYOTA listens to and respects its stakeholders’ criticisms and suggestions, and incorporates these as appropriate into its business.

We endeavor to build positive relationships with stakeholders through open and fair communication.

[Guiding Principles 2 and 6]

3 —2. **Philanthropy and Community Relations** - *Becoming a corporate citizen trusted by international society* -

Towards attaining an enriched society and sustainable development, TOYOTA, in cooperation with society, strives to effectively use its resources and to engage in activities contributing to society. Such activities are aimed at alleviating societal problems or issues and include initiatives with respect to the “nurturing of personnel”, the “environment”, and “traffic safety”.

As a global company, TOYOTA contributes to creating a sustainable society from the broad perspective of the future of the earth and humanity. As a good corporate citizen, TOYOTA also focuses on local communities and focuses on social issues that each local community faces and endeavors to resolve such social issues.

As members of the local community, we will take an interest in and gain awareness of local social issues. Based on such awareness, we will actively take part in philanthropic initiatives such as volunteer activities.

[Guiding Principles 1, 2 and 6]

3 —3. **Shareholder Relations** *- Respect for shareholders' benefit -*

In order to respond to the expectations of shareholders and investors worldwide, TOYOTA strives to operate its business globally and to enhance corporate value, while achieving stable and long-term growth. TOYOTA considers relationships with investors to be important, and through timely and fair investor relationship activities, endeavors to promote understanding of its corporate management and business activities. As for corporate governance, TOYOTA strives to enhance the transparency of its management and actively incorporates management -checks conducted by independent parties.

We endeavor to contribute, through our work, to TOYOTA's efforts to meet the expectations of its shareholders and investors worldwide.

[Guiding Principles 6]

3 —4. **Government Relations** *- Maintaining proper and transparent relations -*

TOYOTA strives to build transparent and fair relationships with political parties or administrative bodies (government agencies and public officials) and takes appropriate actions to comply with applicable laws and regulations.

We maintain healthy and transparent relationships with political and administrative bodies and public officials.

[Guiding Principles 1]

3 —5. **Political and Religious Activities** *- Moderate participation -*

In the absence of any circumstances of concern (e.g., such as the possibility that the activity will hinder the conduct of business), TOYOTA respects participation in politics by people working for TOYOTA and does not, in any way, interfere with individuals' religious activities. However, these are private activities and, in principle, they cannot be conducted on company premises or in company time.

We respect the rights of other people working for TOYOTA to participate in political and religious activities in a moderate manner.

[Guiding Principles 1]

3 —6. **Traffic Safety Education Activities** *- Improve traffic safety awareness of society as a whole -*

In order to help create a safe and comfortable society, in addition to pursuit of safer vehicles, TOYOTA actively promotes traffic safety education activities designed for today's realities. TOYOTA strives to enhance traffic safety awareness not only among people working for TOYOTA, but within society as a whole.

Recognizing the responsibilities of a company engaged in the automobile industry, we abide by traffic rules, and endeavor to be a role models by safe driving and actively promoting traffic safety.

[Guiding Principles 1]

3 —7. **Disaster Prevention and Crime Prevention Activities** *- Creation of a safe society -*

TOYOTA, in cooperation with the local community, engages in disaster prevention activities and contributes to the recovery of local communities in the event of an actual disaster. TOYOTA actively engages in crime prevention activities and the promotion of a safe society.

Each one of us will maintain high moral standards and actively participate in the creation of a safe society.

[Guiding Principles 1]

Toyota Code of Conduct

Issued in March 2006
Revised in September 2018

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TOYOTA



Name



Annexe 29

ACEA Pocket Guide 2020-2021

Association des constructeurs européens d'automobiles

TOYOTA

2020
2021

The Automobile Industry Pocket Guide



ACEA

European
Automobile
Manufacturers
Association

W162 ACEA.BE

BMW GROUP



CNI
INDUSTRIAL

DAF

DAIMLER

Ferrari

FCA

FIAT CHRYSLER AUTOMOBILES



HONDA
The Power of Dreams

 **HYUNDAI**

 **JAGUAR**



PSA
GROUPE

GROUPE
RENAULT

TOYOTA

VOLKSWAGEN

AKTIENGESELLSCHAFT



Foreword

I am proud to present you the latest edition of ACEA's Pocket Guide. With the latest data on employment, production, sales, innovation, road safety and trade flows, this publication serves as a handy reference work on one of Europe's most strategic and innovative sectors: the automotive industry.

The automotive ecosystem provides work to 14.6 million Europeans, representing a sizeable 6.7% of total employment in the European Union¹. With 2.7 million people working on the manufacturing of vehicles across 226 factories in the EU, the auto industry accounts for 8.5% of total manufacturing jobs in the region.

More than 18.5 million vehicles were 'made in Europe' in 2019, representing 20% of global vehicle production. 5.6 million of these vehicles were exported around the world, generating a trade surplus of €74 billion for the EU.

There are 313 million vehicles in circulation on Europe's roads today. Apart from ensuring that people and goods can move freely throughout the continent, these vehicles are a significant source of government revenue, bringing in over €440.4 billion in taxes.

Innovation is the core of our sector's DNA. Indeed, the auto industry is by far the biggest spender on R&D in the EU, investing an impressive €60.9 billion. This figure puts us well ahead of the global competition, and helps make the clean and smart mobility transformation a reality. It is not a surprise then to see that EU leads the world when it comes to patents for self-driving vehicles, responsible for a third of global applications.

1. Although the United Kingdom is no longer part of the European Union (as of 1 February 2020), ACEA decided to base this year's edition of the Pocket Guide on the former EU28 aggregate, as data included cover time frames during which the UK was still an EU member state.

We are unfortunately now facing very strong headwinds in the aftermath of the coronavirus crisis, which has hit our sector with an unprecedented force. Unless EU policy makers and national governments urgently step up their political and economic support, for instance with green fleet renewal schemes, last year's car sales total (15.3 million) will be slashed by around 25% in 2020, putting jobs, production and future investments under serious threat.

This Pocket Guide shows that the automobile industry is a key pillar of the European economy. As such, it is vital to the wider recovery of the continent. We stand committed to work with policy makers to ensure that our sector can keep contributing in a strong and green way to the EU's industrial base, as well as to its global innovation leadership.



Eric-Mark Huitema
ACEA Director General

A handwritten signature in blue ink, appearing to read 'Eric-Mark Huitema'. The signature is stylized with a large, sweeping initial 'E' and 'M'.

COVID-19 impact

The effect of the coronavirus on the European automobile industry is unprecedented. Most vehicle manufacturers have had to shut down their development and production sites for several weeks or even months this year.

Although the exact ramifications of COVID-19 for full-year 2020 results are still unknown, these figures show the impact of the coronavirus on auto production and employment at the peak of the crisis.

- The jobs of more than 1.1 million Europeans working in automobile manufacturing were directly affected by factory shutdowns during the lockdown period.
- EU-wide production losses amounted to more than 2.4 million motor vehicles during the peak crisis months of March, April and May 2020 alone; that is 13% of total production in 2019.

Impact of COVID-19 on the EU automobile industry

MARCH - MAY 2020

	Employees affected ¹	Estimated loss in production ² (number of vehicles)	Average shutdown duration ³ (in working days)
Austria	14,307	26,480	34
Belgium	30,000	33,360	25
Croatia	700	–	29
Czech Republic	45,000	155,060	29
Finland	4,500	11,604	25
France	90,000	278,425	34
Germany	568,518	616,591	30
Hungary	30,000	51,552	22
Italy	69,382	157,933	41
Netherlands	13,500	30,819	25
Poland	17,284	101,957	36
Portugal	20,000	41,525	35
Romania	20,000	68,673	31
Slovakia	20,000	114,632	24
Slovenia	2,890	19,399	27
Spain	60,000	452,155	34
Sweden	67,000	23,464	15
United Kingdom	65,455	262,715	41
TOTAL (EU+UK)	1,138,536	2,446,344	30

1. ACEA based on multiple sources (Marklines, national automobile manufacturers' associations, OEM reporting)

2. ACEA based on Feb IHS Markit Production Forecast

3. Numbers refer to operating days (without weekends) according to latest OEM reporting

Key figures

EMPLOYMENT

Manufacturing of motor vehicles (EU)	2.7 million people = 8.5% of EU employment in manufacturing	2018
Total (EU manufacturing, services and construction)	14.6 million people = 6.7% of total EU employment	2018

PRODUCTION

Motor vehicles (world)	92.8 million units	2019
Motor vehicles (EU)	18.5 million units = 20% of global motor vehicle production	2019
Passenger cars (world)	74.2 million units	2019
Passenger cars (EU)	15.8 million units = 21% of global passenger car production	2019

REGISTRATIONS

Motor vehicles (world)	93.3 million units	2019
Motor vehicles (EU)	17.9 million units = 19% of global motor vehicle registrations/sales	2019
Passenger cars (world)	74.9 million units	2019
Passenger cars (EU)	15.3 million units = 20% of global passenger car registrations/sales	2019
Petrol (EU)	58.9% market share	2019
Diesel (EU)	30.5% market share	2019
Electrically-chargeable (EU)	3.0% market share	2019

TRADE

Motor vehicle exports (extra-EU)	€135.9 billion	2019
Motor vehicle imports (extra-EU)	€62.0 billion	2019
Trade surplus	€73.9 billion	2019

VEHICLES IN USE

Motor vehicles (EU)	312.7 million units	2018
Passenger cars (EU)	271.5 million units	2018
Motorisation rate (EU)	610 vehicles per 1,000 inhabitants	2018
Average age of cars (EU)	10.8 years	2018

ROAD SAFETY

Road fatalities (EU)	48 people per million inhabitants	2019
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ENVIRONMENT

Average CO2 emissions new cars (EU)	123g CO2/km	2019
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INNOVATION

Automotive R&D investment	€60.9 billion	2018
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TAXATION

Fiscal income from motor vehicles	€440.4 billion	2019
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1

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2020/2021

Employment



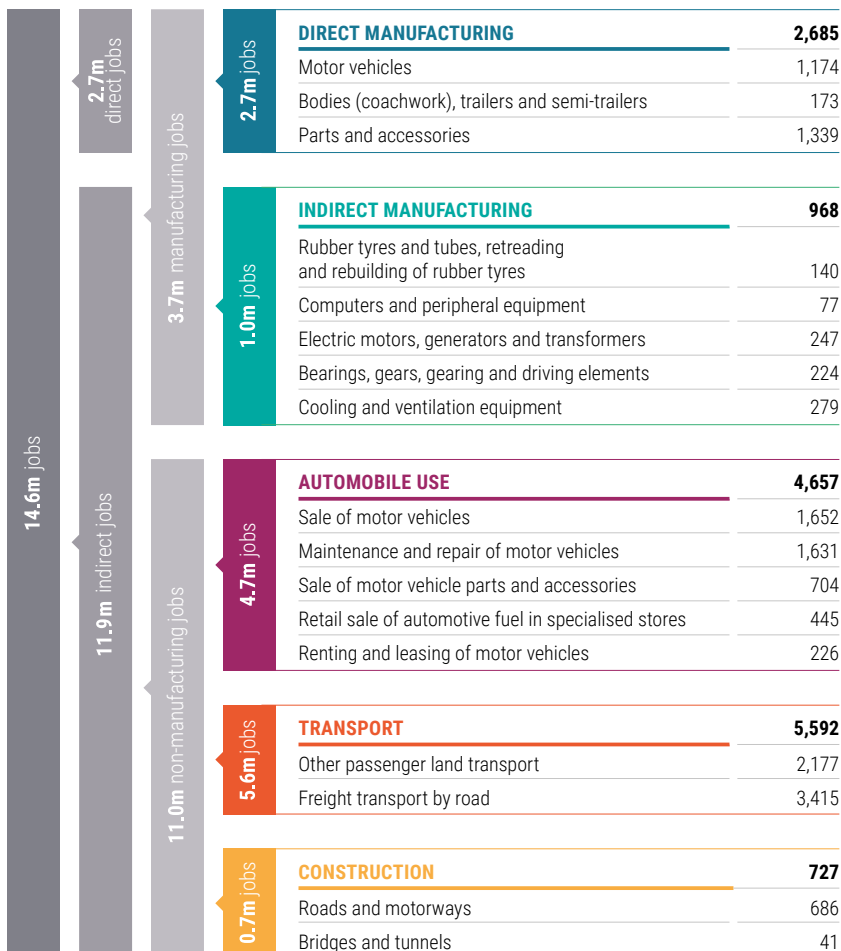
ACEA

European
Automobile
Manufacturers
Association

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Automotive sector: direct and indirect employment in the EU

IN THOUSANDS / 2018¹

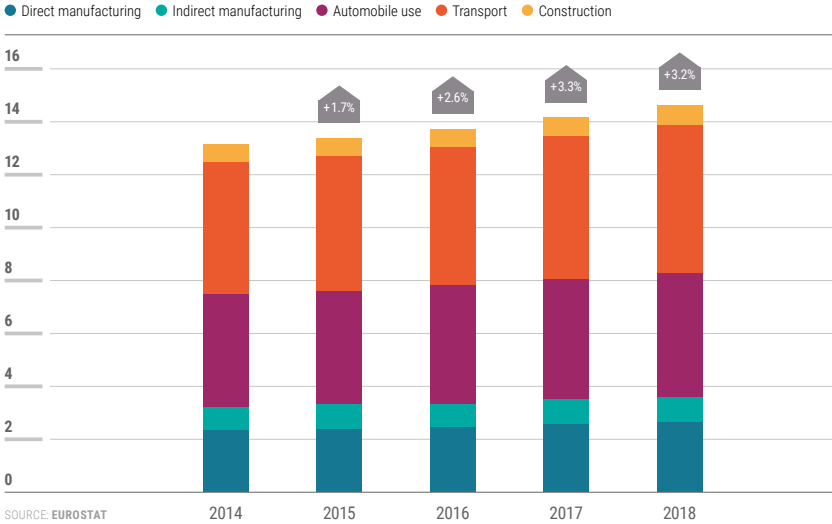
SOURCE: EUROSTAT

1. Provisional figures

The auto industry provides direct and indirect jobs for 14.6 million Europeans

Employment in the EU automotive sector

IN MILLION JOBS / 2014 – 2018



SOURCE: EUROSTAT

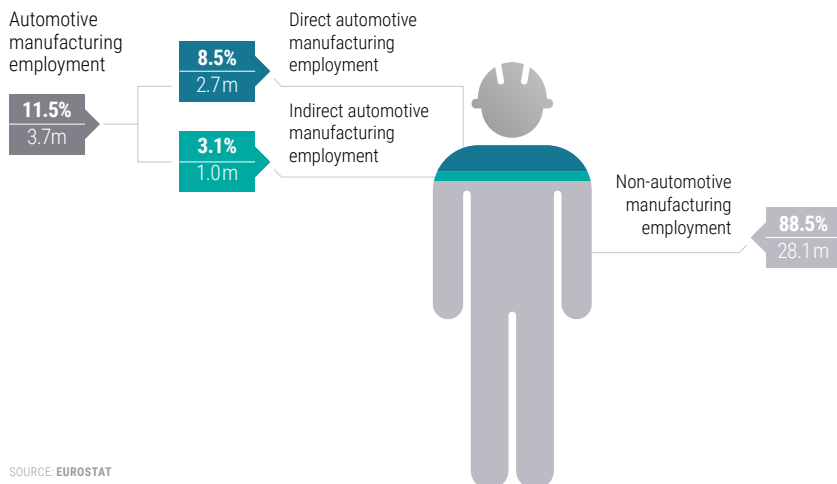
EU automotive employment	2014	2015	2016	2017	2018	% change 18/17
Direct manufacturing	2,369,951	2,441,910	2,491,693	2,597,345	2,685,478	3.4
Indirect manufacturing	892,885	910,004	899,647	958,152	967,925	1.0
Automobile use	4,264,490	4,304,382	4,453,169	4,531,379	4,657,198	2.8
Transport	4,980,618	5,047,587	5,229,789	5,390,441	5,591,549	3.7
Construction	641,931	675,338	650,011	705,199	727,230	3.1
TOTAL	13,149,875	13,379,221	13,724,309	14,182,516	14,629,380	3.2

SOURCE: EUROSTAT

**The automotive sector
accounts for 6.7% of all EU jobs**

EU manufacturing employment

% SHARE / 2018



SOURCE: EUROSTAT

Direct automotive
manufacturing employment

2.7 million people
= 8.5% of EU employment in manufacturing

Direct & indirect automotive
manufacturing employment

3.7 million people
= 11.5% of EU employment in manufacturing

Total automotive employment
(manufacturing, services and construction)

14.6 million people
= 6.7% of total EU employment

EU employment in the manufacturing sector

31.7 million people
= 14.5% of total EU employment

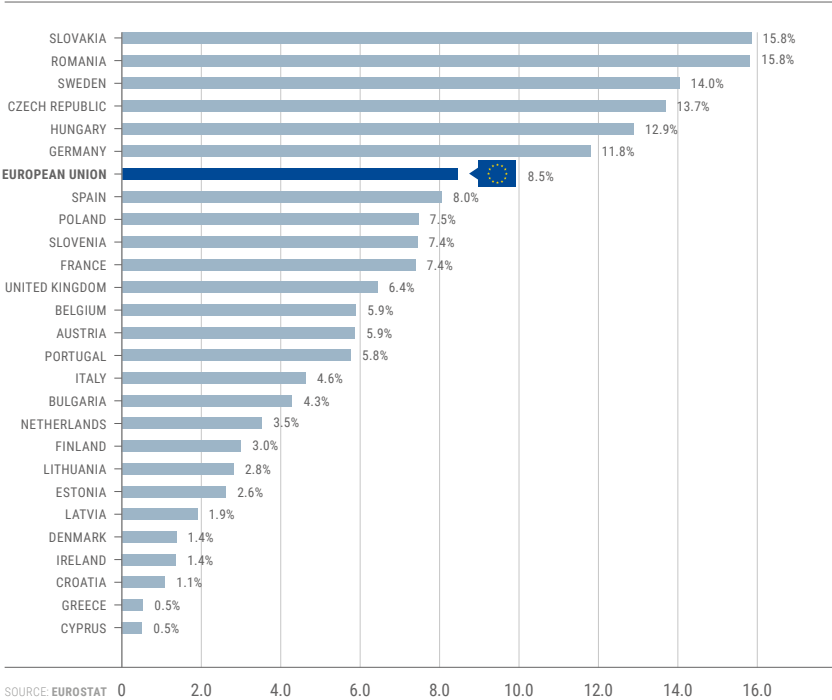
EU total employment

219.4 million people

SOURCE: EUROSTAT

**11.5% of EU manufacturing employment
is in the auto sector**

Share of direct automotive employment in total manufacturing **BY COUNTRY / 2018**



Direct automotive manufacturing employment **BY COUNTRY / 2018**

Austria	39,569	France	229,422	Poland	213,708
Belgium	28,768	Germany	882,046	Portugal	42,358
Bulgaria	23,777	Greece	1,737	Romania	190,848
Croatia	2,919	Hungary	101,865	Slovakia	81,273
Cyprus	168	Ireland	3,000	Slovenia	15,887
Czech Republic	181,415	Italy	176,303	Spain	162,634
Denmark	4,317	Latvia	2,317	Sweden	90,473
Estonia	2,880	Lithuania	6,163	United Kingdom	166,228
Finland	10,199	Netherlands	25,204		

 **EUROPEAN UNION** 2,685,478

SOURCE: EUROSTAT

**The EU automotive sector directly employs
2.7 million people in manufacturing**



2

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2020/2021

Production



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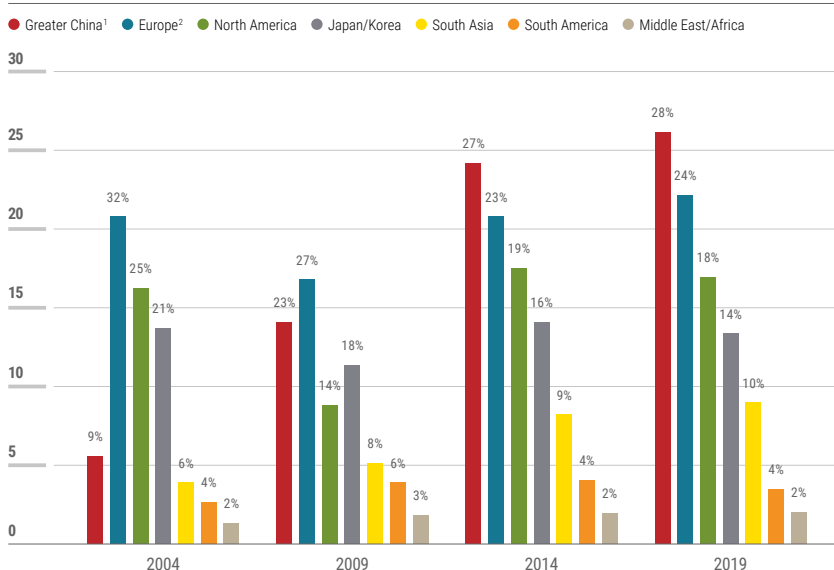
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World motor vehicle production

IN MILLION UNITS, % SHARE / 2004 – 2019



SOURCE: IHS MARKIT, OICA

World motor vehicle production

IN 1,000 UNITS / 2019

	2019	2018	% change 19/18	% share 2019
Europe ²	22,060	23,049	-4.3	23.8
Greater China ¹	26,149	28,297	-7.6	28.2
Japan/Korea	13,323	13,423	-0.8	14.4
Middle East/Africa	1,998	2,556	-21.8	2.2
North America	16,902	17,535	-3.6	18.2
South America	3,421	3,574	-4.3	3.7
South Asia	8,933	9,883	-9.6	9.6
WORLD	92,786	98,316	-5.6	100.0

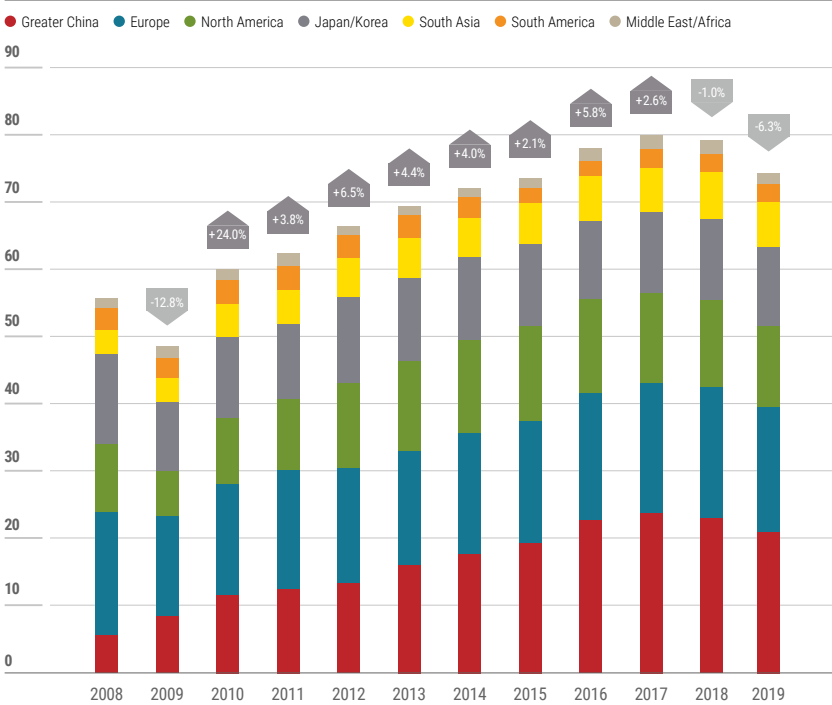
SOURCE: IHS MARKIT, OICA

1. Includes Hong Kong and Taiwan
 2. Includes Turkey and CIS countries

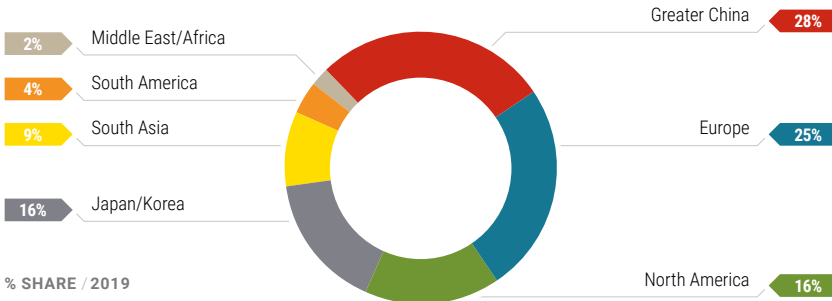
92.8 million motor vehicles
were produced globally in 2019

World passenger car production

IN MILLION UNITS, % CHANGE / 2008 – 2019



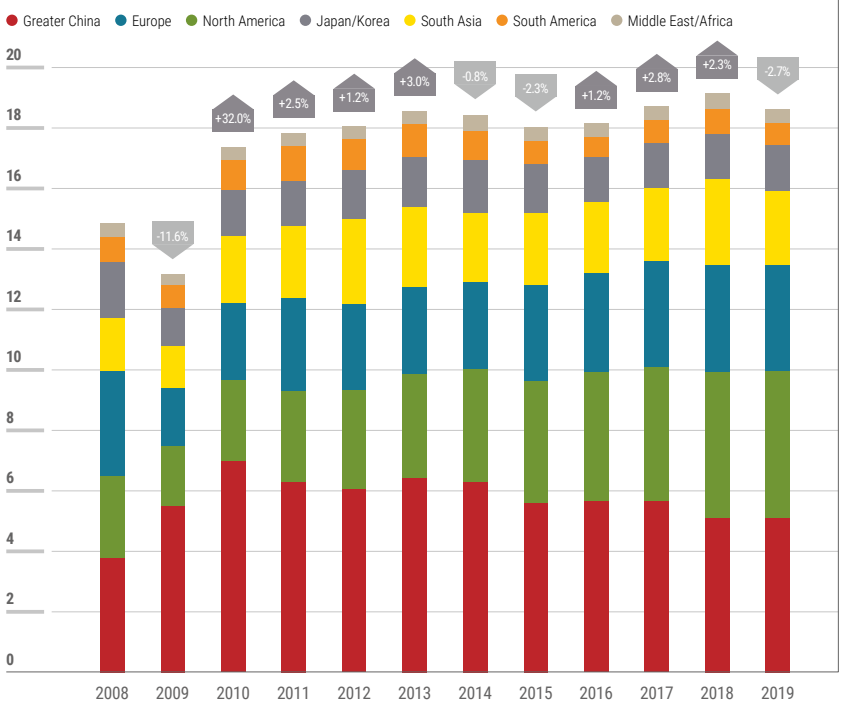
SOURCE: IHS MARKIT, OICA



25% of all passenger cars produced worldwide are made in Europe

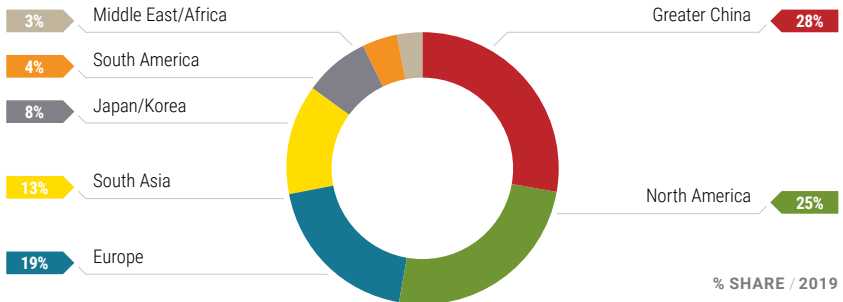
World commercial vehicle production¹

IN MILLION UNITS, % CHANGE / 2008 – 2019



SOURCE: IHS MARKIT, OICA

1. Includes buses



19% of all commercial vehicles are manufactured in Europe

Motor vehicle production in the EU

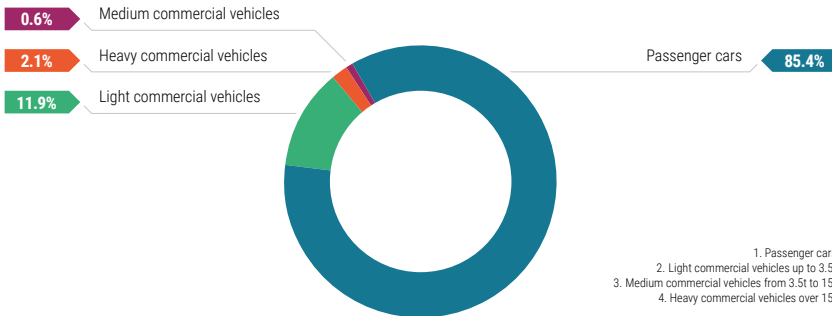
BY COUNTRY / 2019

	PC ¹	LCV ²	MCV ³	HCV ⁴	TOTAL
Austria	158,400	-	9,721	8,680	176,801
Belgium	247,020	-	-	38,434	285,454
Czech Republic	1,427,563	-	67	990	1,428,620
Finland	114,161	-	-	126	114,287
France	1,675,198	563,175	12,661	52,665	2,303,699
Germany	4,661,328	369,203	26,042	107,955	5,164,528
Hungary	498,158	-	-	-	498,158
Italy	542,007	302,820	29,680	5,217	879,724
Lithuania	-	-	-	56	56
Netherlands	176,113	-	-	82,226	258,339
Poland	434,700	186,441	6,923	14,438	642,502
Portugal	282,142	83,399	4,447	-	369,988
Romania	490,412	-	-	-	490,412
Slovakia	1,069,442	-	-	-	1,069,442
Slovenia	199,102	-	-	-	199,102
Spain	2,248,019	640,117	10,054	17,242	2,915,432
Sweden	285,709	-	-	47,600	333,309
United Kingdom	1,303,135	55,963	6,941	11,942	1,377,981
EUROPEAN UNION	15,812,609	2,201,118	106,536	387,571	18,507,834

SOURCE: IHS MARKIT, OICA

EU motor vehicle production by type

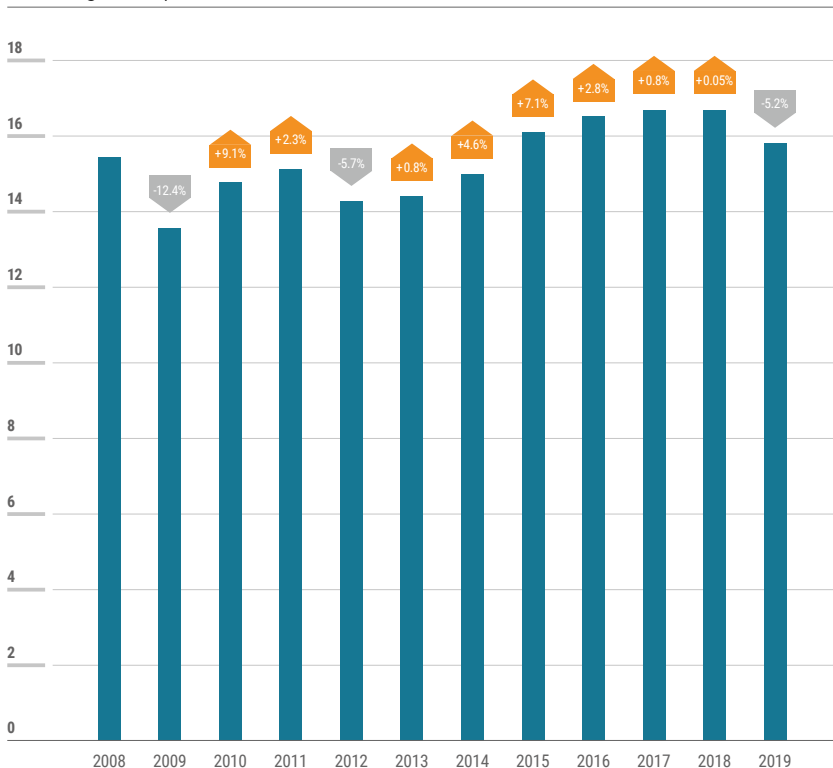
% SHARE / 2019



**18.5 million motor vehicles
were manufactured in the EU in 2019**

Passenger car production in the EU

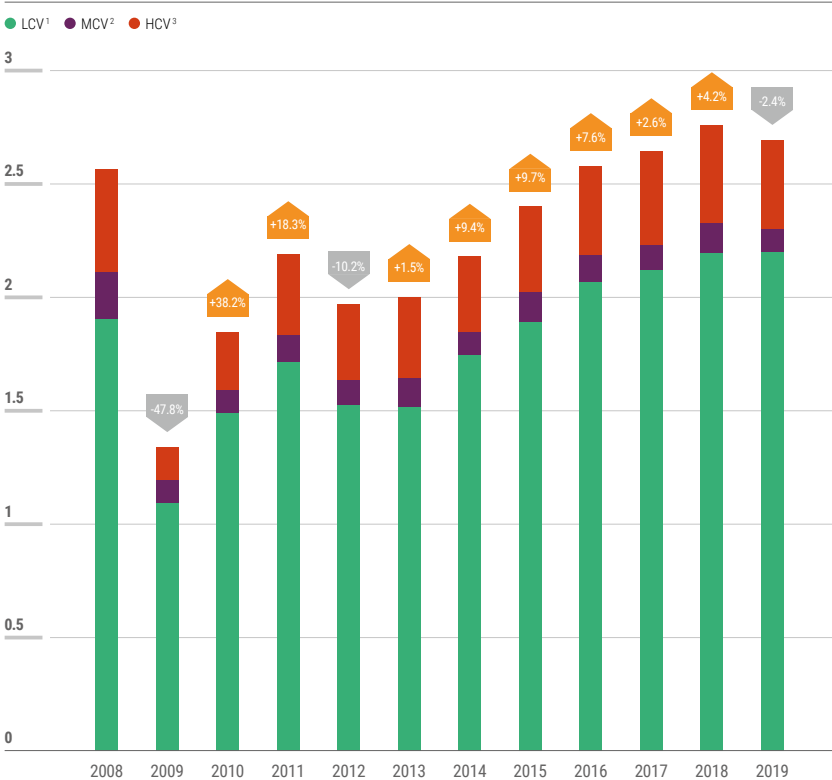
IN MILLION UNITS, % CHANGE / 2008 – 2019



SOURCE: IHS MARKIT, OICA

Commercial vehicle production in the EU

IN MILLION UNITS, % CHANGE / 2008 – 2019

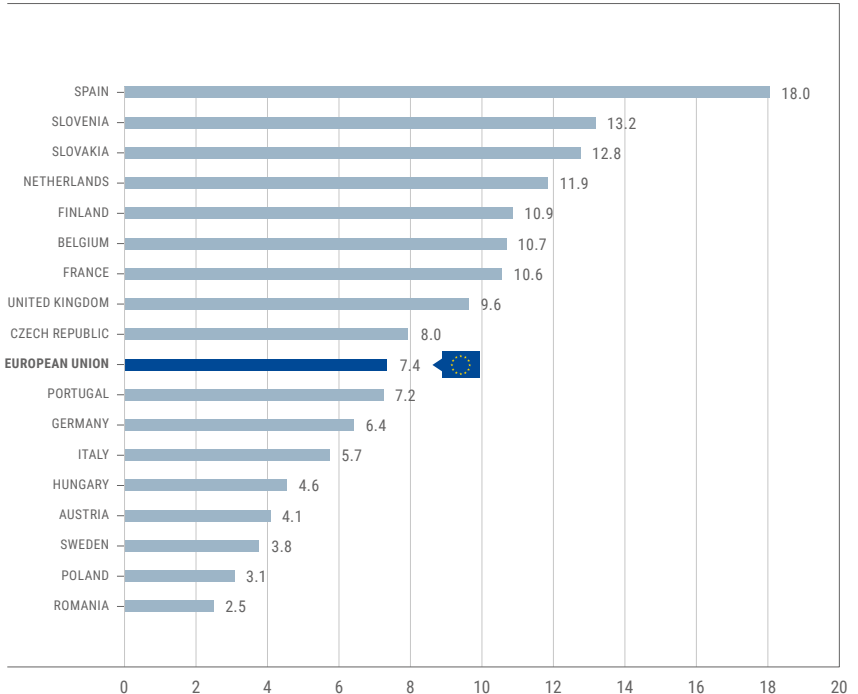


SOURCE: IHS MARKIT, OICA

- 1. Light commercial vehicles up to 3.5t
- 2. Medium commercial vehicles from 3.5t to 15t
- 3. Heavy commercial vehicles over 15t

**Some 2.7 million commercial vehicles
were produced in the EU in 2019**

Motor vehicle production per direct automotive manufacturing employee

BY COUNTRY / 2018¹

SOURCE: EUROSTAT, IHS MARKIT, OICA

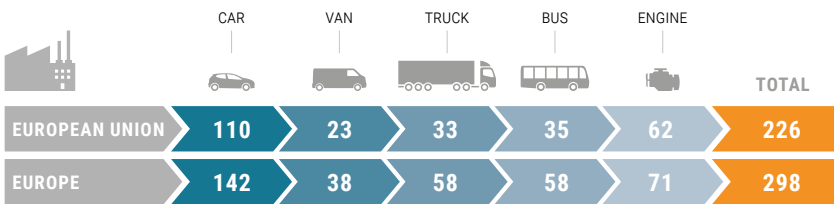
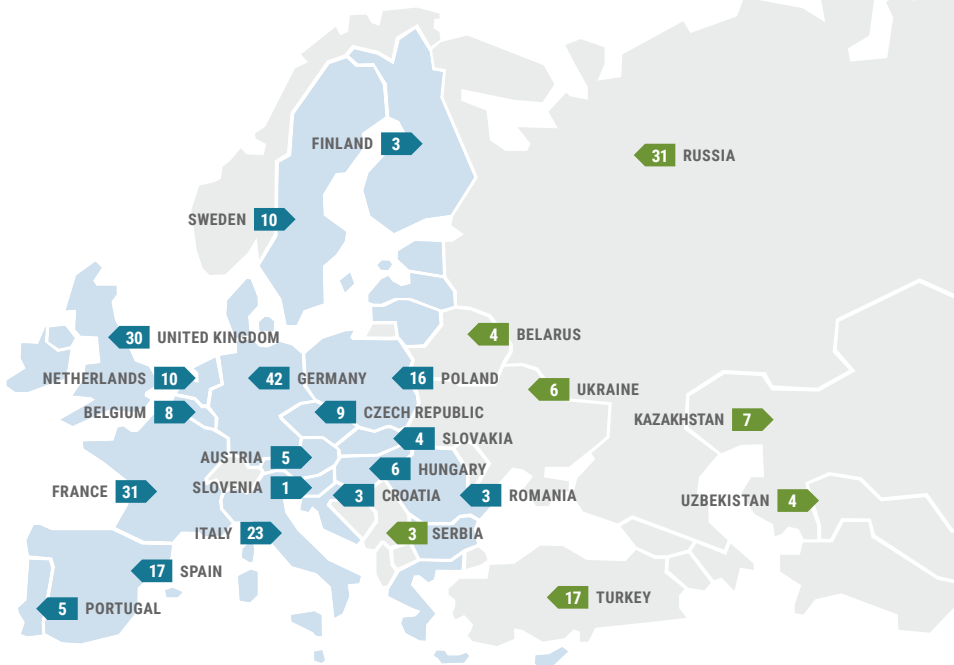
1. Based on total direct manufacturing employment, most recent data available

**The EU auto industry produces an average of
7.4 vehicles per worker**

Automobile assembly and engine production plants in Europe

2019

● EU ● NON-EU



SOURCE: ACEA

There are 226 automobile assembly and production plants in the EU



3

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2020/2021

Registrations



ACEA

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New motor vehicle registrations

IN THOUSAND UNITS / 2019

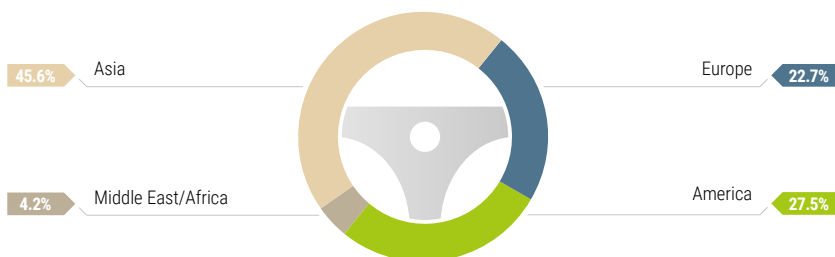
	2019	2018	% change 19/18	% share 2019
EUROPE	21,136	21,070	0.3	22.7
European Union ¹	17,885	17,643	1.4	19.2
EFTA	555	551	0.6	0.6
Russia	1,828	1,901	-3.9	2.0
Turkey	491	643	-23.6	0.5
Ukraine	103	90	13.8	0.1
Others: Europe ²	274	242	13.5	0.3
AMERICA	25,659	26,216	-2.1	27.5
North America	20,967	21,355	-1.8	22.5
of which the United States	17,641	17,857	-1.2	18.9
South America	4,692	4,861	-3.5	5.0
of which Brazil	2,784	2,550	9.2	3.0
ASIA	42,559	45,731	-6.9	45.6
China	26,271	28,546	-8.0	28.2
Japan	5,188	5,258	-1.3	5.6
India	3,877	4,455	-13.0	4.2
South Korea	1,784	1,820	-2.0	1.9
Others: Asia ³	5,439	5,652	-3.8	5.8
MIDDLE EAST/AFRICA	3,931	4,356	-9.8	4.2
WORLD	93,285	97,374	-4.2	100.0

SOURCE: ACEA, IHS MARKIT

1. Data for Malta not available

2. Includes Belarus, Bosnia-Herzegovina, Kazakhstan, North Macedonia, Serbia, Uzbekistan

3. Includes Hong Kong, Taiwan and all the other South Asian countries



**Europe accounts for almost 23%
of the world's motor vehicle sales**

New passenger car registrations

IN THOUSAND UNITS / 2019

	2019	2018	% change 19/18	% share 2019
EUROPE	18,141	18,062	0.4	24.2
European Union ¹	15,340	15,159	1.2	20.5
EFTA	466	466	0.0	0.6
Russia	1,638	1,683	-2.7	2.2
Turkey	387	486	-20.4	0.5
Ukraine	90	77	17.6	0.1
Others: Europe ²	219	191	15.0	0.3
AMERICA	19,596	20,421	-4.0	26.1
North America ³	16,036	16,667	-3.8	21.4
<i>of which the United States</i>	<i>13,464</i>	<i>13,910</i>	<i>-3.2</i>	<i>18.0</i>
South America	3,559	3,754	-5.2	4.7
<i>of which Brazil</i>	<i>2,262</i>	<i>2,090</i>	<i>8.3</i>	<i>3.0</i>
ASIA	33,958	36,645	-7.3	45.3
China	21,163	23,220	-8.9	28.2
Japan	4,296	4,376	-1.8	5.7
India	3,074	3,464	-11.3	4.1
South Korea	1,488	1,519	-2.0	2.0
Others: Asia ⁴	3,937	4,065	-3.2	5.3
MIDDLE EAST/AFRICA	3,252	3,677	-11.6	4.3
WORLD	74,946	78,805	-4.9	100.0

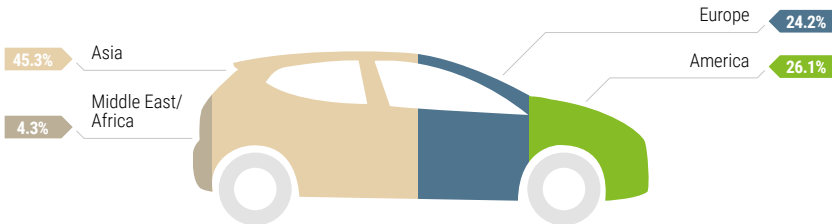
SOURCE: ACEA, IHS MARKIT

1. Data for Malta not available

2. Includes Belarus, Bosnia-Herzegovina, Kazakhstan, North Macedonia, Serbia, Uzbekistan

3. Based on production type

4. Includes Hong Kong, Taiwan and all the other South Asian countries



75 million passenger cars were registered worldwide in 2019

New commercial vehicle¹ registrations

IN THOUSAND UNITS / 2019

	2019	2018	% change 19/18	% share 2019
EUROPE	2,995	3,008	-0.4	16.3
European Union ²	2,545	2,484	2.5	13.9
EFTA	89	85	4.2	0.5
Russia	190	218	-13.0	1.0
Turkey	104	157	-33.7	0.6
Ukraine	12	13	-8.3	0.1
Others: Europe	55	51	8.0	0.3
AMERICA	6,063	5,795	4.6	33.1
North America ³	4,931	4,688	5.2	26.9
of which the United States	4,177	3,947	5.8	22.8
South America	1,133	1,106	2.4	6.2
of which Brazil	522	460	13.5	2.8
ASIA	8,601	9,087	-5.3	46.9
China	5,107	5,326	-4.1	27.8
Japan	892	882	1.1	4.9
India	803	990	-18.9	4.4
South Korea	296	301	-1.7	1.6
Others: Asia	1,503	1,587	-5.3	8.2
MIDDLE EAST/AFRICA	679	679	0.0	3.7
WORLD	18,339	18,569	-1.2	100.0

SOURCE: ACEA, IHS MARKIT

1. Includes light, medium and heavy commercial vehicles, and buses and coaches

2. Data for Malta not available


3. Based on production type



18.3 million vans, trucks and buses
were registered globally in 2019

Motor vehicle registrations in the EU¹

BY COUNTRY / 2019

	PC ²	LCV ³	CV ⁴	BC ⁵	TOTAL
AUSTRIA	329,363	43,425	8,082	1,163	382,033
BELGIUM	550,003	81,219	11,531	1,310	644,063
BULGARIA	35,371	5,985	-	-	41,356
CROATIA	62,975	8,982	1,472	278	73,707
CYPRUS	12,220	2,274	120	-	14,614
CZECH REPUBLIC	249,915	20,436	9,852	1,220	281,423
DENMARK	225,594	33,108	5,024	535	264,261
ESTONIA	26,589	4,403	1,034	200	32,226
FINLAND	114,199	14,702	4,020	593	133,514
FRANCE	2,214,279	478,375	56,261	6,780	2,755,695
GERMANY	3,607,258	304,965	98,399	6,437	4,017,059
GREECE	114,110	7,972	428	364	122,874
HUNGARY	157,900	26,203	5,276	705	190,084
IRELAND	117,100	25,350	2,209	445	145,104
ITALY	1,916,320	187,725	23,622	4,249	2,131,916
LATVIA	18,235	2,703	1,110	98	22,146
LITHUANIA	46,461	4,355	7,327	515	58,658
LUXEMBOURG	55,008	5,089	1,202	273	61,572
NETHERLANDS	446,114	76,395	15,448	935	538,892
POLAND	555,598	69,872	28,317	2,471	656,258
PORTUGAL	223,799	38,454	4,975	601	267,829
ROMANIA	161,562	16,985	6,435	1,952	186,934
SLOVAKIA	101,568	8,508	3,482	305	113,863
SLOVENIA	73,211	13,407	2,265	202	89,085
SPAIN	1,258,260	215,164	24,575	3,261	1,501,260
SWEDEN	356,036	53,816	7,308	1,318	418,478
UNITED KINGDOM	2,311,140	365,778	57,230	5,874	2,740,022
 EUROPEAN UNION	15,340,188	2,115,650	387,004	42,084	17,884,926
ICELAND	11,717	1,383	304	79	13,483
NORWAY	142,381	37,736	7,411	2,296	189,824
SWITZERLAND	311,466	34,555	4,291	961	351,273
EFTA	465,564	73,674	12,006	3,336	554,580
EU + EFTA	15,805,752	2,189,324	399,010	45,420	18,439,506

SOURCE: ACEA

1. Data for Malta not available

2. Passenger cars

3. Light commercial vehicles up to 3.5t

4. Commercial vehicles over 3.5t (trucks)

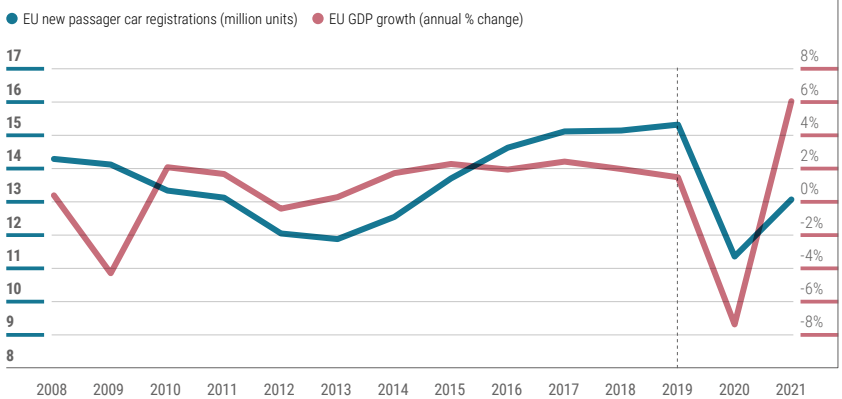
5. Buses and coaches over 3.5t

**The EU represents a market of
17.9 million motor vehicles**

www.189 A.BE

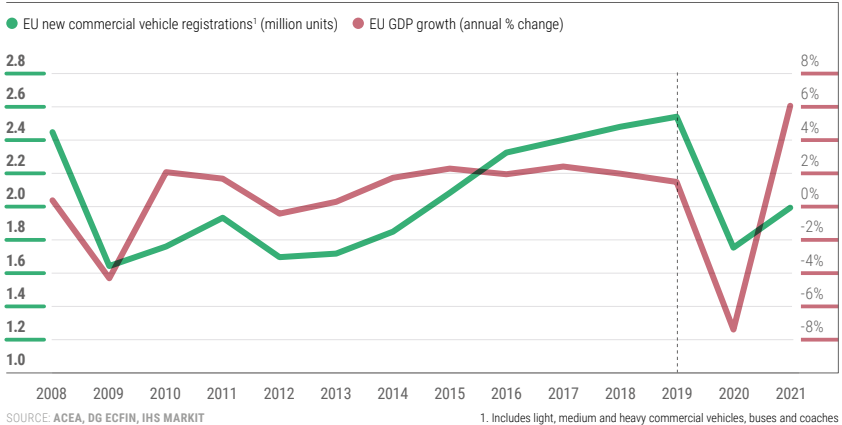
New passenger car registrations and annual GDP growth in the EU

2008 – 2021

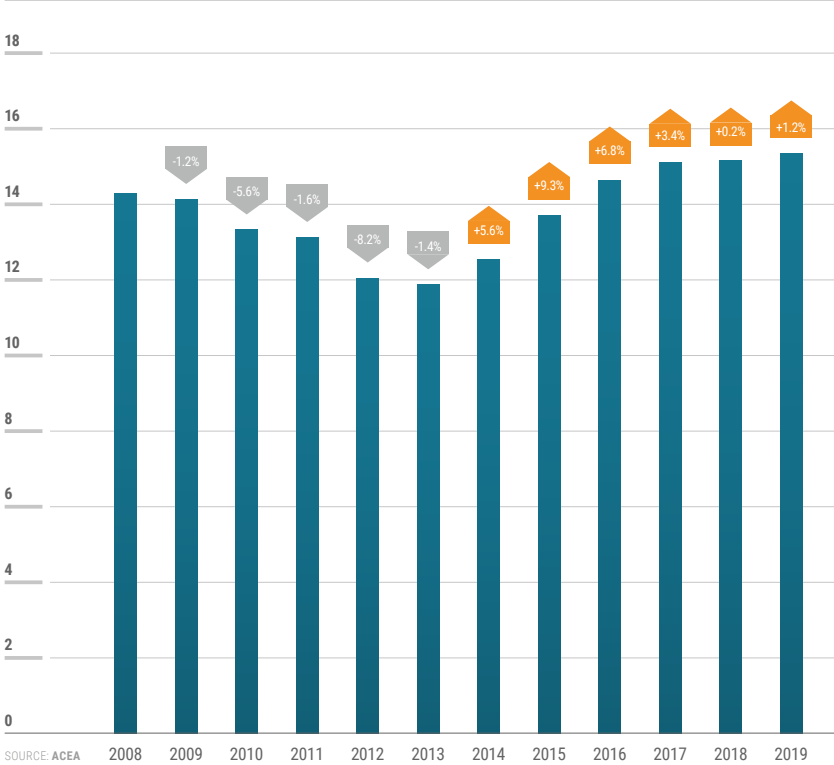


New commercial vehicle registrations and annual GDP growth in the EU

2008 – 2021



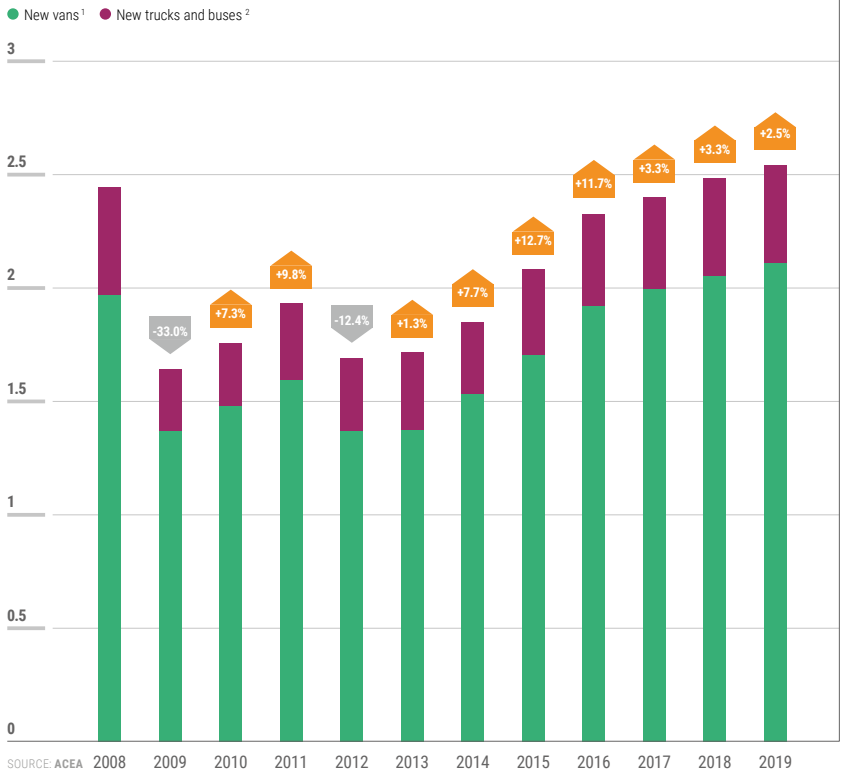
New passenger car registrations in the EU IN MILLION UNITS, % CHANGE / 2008 - 2019



15.3 million cars were sold across the EU in 2019

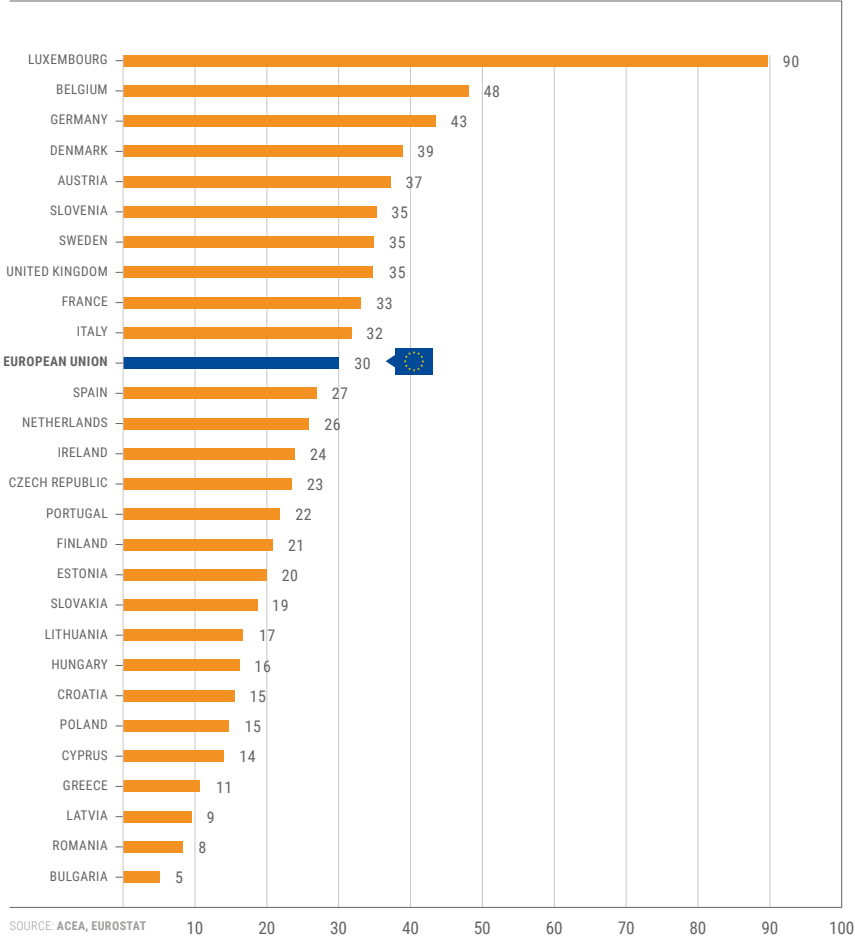
New commercial vehicle registrations in the EU

IN MILLION UNITS, % CHANGE / 2008 – 2019



1. Light commercial vehicles up to 3.5t
2. Commercial vehicles, buses and coaches over 3.5t

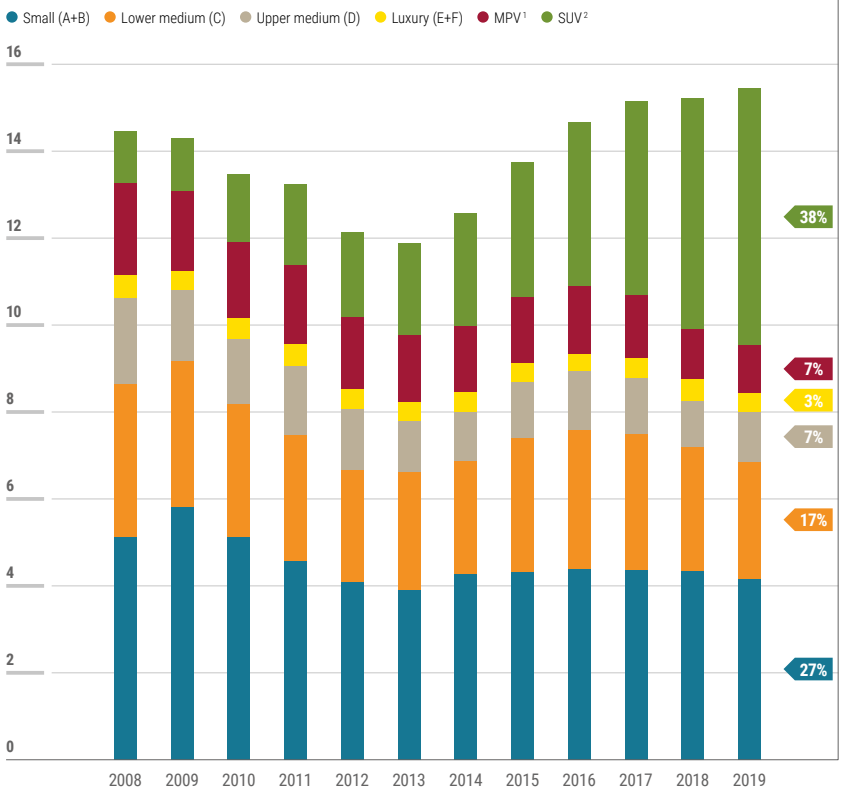
New passenger car registrations per 1,000 inhabitants BY COUNTRY, IN UNITS / 2019



**30 new cars were registered per
1,000 inhabitants in the EU in 2019**

New passenger cars by segment in the EU

IN MILLION UNITS, % SHARE / 2008 – 2019



SOURCE: IHS MARKIT

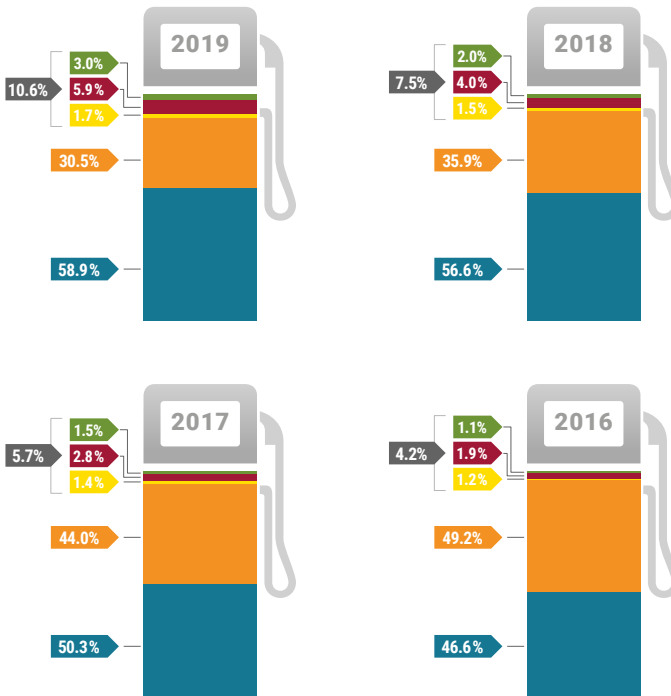
1. Multi-purpose vehicles
2. Sport utility vehicles

Small and medium cars account for over half of total EU car sales

New passenger cars by fuel type in the EU¹

% SHARE / 2016 – 2019

● Petrol ● Diesel ● Electrically-chargeable² ● Hybrid³ ● Alternative fuels⁴ ● Total alternatively-powered



SOURCE: ACEA

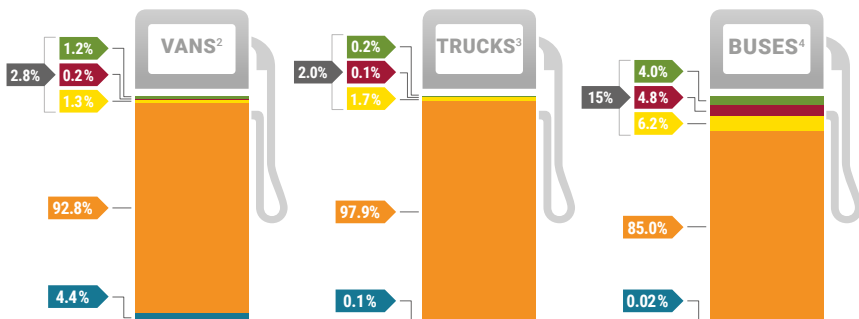
1. Data for Croatia, Cyprus, Luxembourg and Malta not available
2. Includes battery electric vehicles, fuel-cell electric vehicles, extended-range and plug-in hybrid electric vehicles
3. Includes full and mild hybrids
4. Includes LPG, natural gas and ethanol vehicles

**More than half of all new cars
in the EU run on petrol (58.9%)**

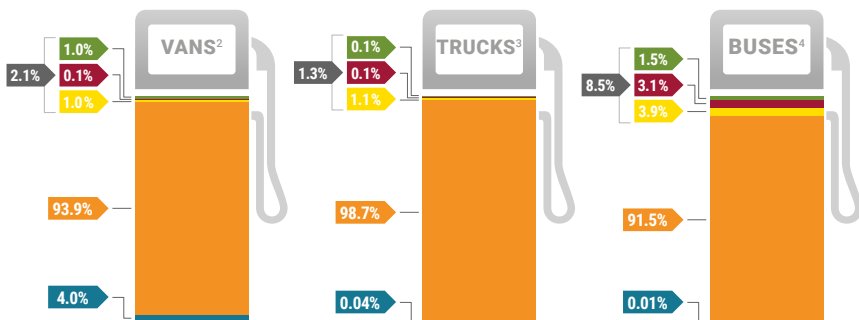
New commercial vehicles and buses by fuel type in the EU¹

% SHARE / 2019

● Petrol ● Diesel
● Electrically-chargeable ● Hybrid ● Alternative fuels ● Total alternatively-powered



% SHARE / 2018



SOURCE: ACEA

1. Data for Bulgaria, Croatia, Malta and Lithuania not available

2. Light commercial vehicles up to 3.5t

3. Commercial vehicles over 3.5t

4. Buses and coaches over 3.5t

**The vast majority of commercial vehicles
are fuelled by diesel**



THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2020/2021

Trade



ACEA

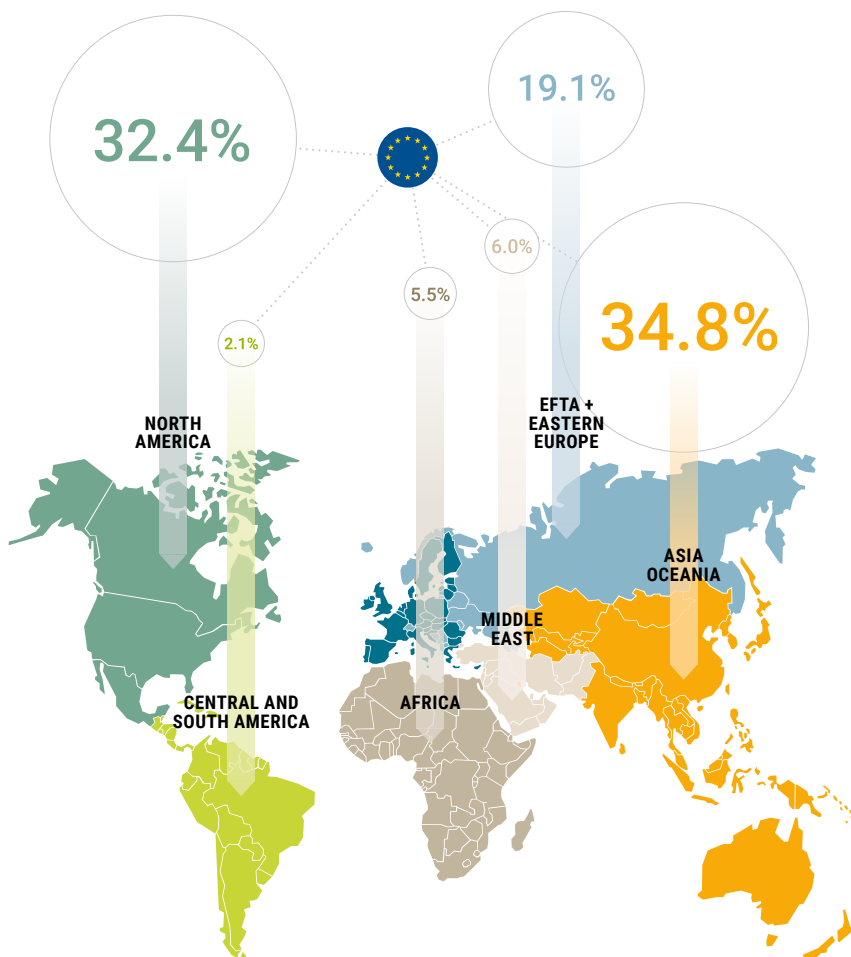
European
Automobile
Manufacturers
Association

WWW.ACEA.BE



EU exports of motor vehicles

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

EU motor vehicle trade

BY TYPE, IN MILLION € / 2019

Trade in value	PC ¹	LCV ²	CV & BC ³	TOTAL
2019				
Imports	53,222	6,326	2,489	62,037
Exports	124,614	3,990	7,333	135,937
Trade balance	71,392	-2,336	4,844	73,900
2018				
Imports	46,026	6,006	2,045	54,077
Exports	127,568	4,149	6,630	138,347
Trade balance	81,541	-1,857	4,585	84,270
% change 19/18				
Imports	15.6%	5.3%	21.7%	14.7%
Exports	-2.3%	-3.8%	10.6%	-1.7%
Trade balance	-12.4%	25.8%	5.6%	-12.3%

SOURCE: EUROSTAT

EU motor vehicle trade

BY TYPE, IN UNITS / 2019

Trade in volume	PC ¹	LCV ²	CV & BC ³	TOTAL
2019				
Imports	3,617,517	427,711	119,246	4,164,474
Exports	5,000,566	374,918	235,247	5,610,731
2018				
Imports	3,651,012	458,779	93,693	4,203,484
Exports	5,369,240	357,558	296,318	6,023,116
% change 19/18				
Imports	-0.9%	-6.8%	27.3%	-0.9%
Exports	-6.9%	4.9%	-20.6%	-6.8%

SOURCE: EUROSTAT

1. Passenger cars

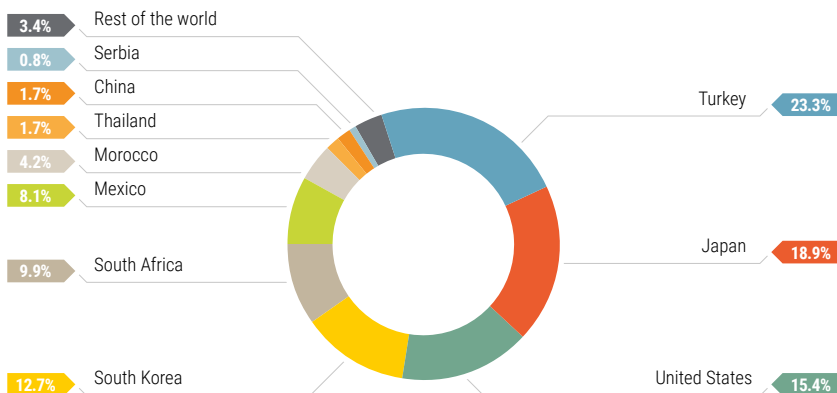
2. Light commercial vehicles up to 5t

3. Commercial vehicles over 5t, including buses and coaches

**The automobile industry generates
an annual trade surplus of €74 billion for the EU**

Countries of origin of EU motor vehicle imports

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

Main countries of origin of EU motor vehicle imports

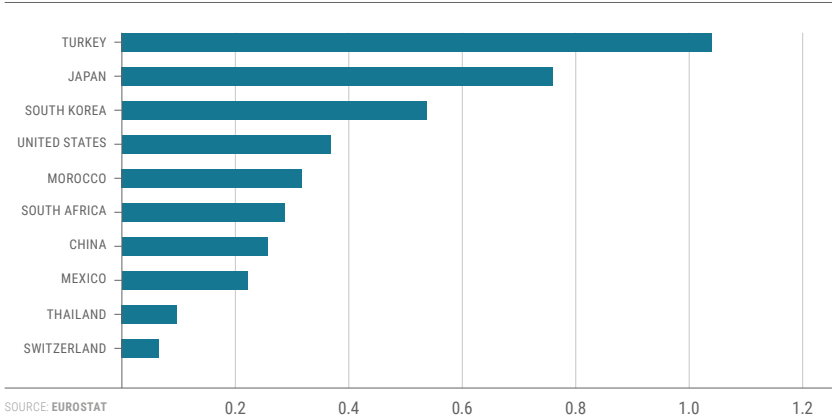
BY VALUE, IN MILLION € / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	31,327	39,109	45,932	52,705	54,077	62,037	14.7	100.0
Turkey	7,931	9,872	11,961	13,870	14,331	14,463	0.9	23.3
Japan	6,669	7,738	9,196	9,739	9,924	11,717	18.1	18.9
United States	4,949	7,008	7,302	6,590	5,671	9,528	68.0	15.4
South Korea	4,027	4,354	4,829	6,599	7,195	7,895	9.7	12.7
South Africa	1,609	2,757	3,639	3,901	4,884	6,147	25.9	9.9
Mexico	1,075	1,652	2,224	4,744	5,282	5,006	-5.2	8.1
Morocco	1,363	1,530	1,742	2,108	2,491	2,605	4.6	4.2
Thailand	751	931	1,134	1,139	965	1,048	8.6	1.7
China	192	212	284	465	590	1,034	75.4	1.7
Serbia	1,152	1,049	1,032	854	672	470	-30.1	0.8

SOURCE: EUROSTAT

Main countries of origin of EU motor vehicle imports

IN MILLION UNITS / 2019



Main countries of origin of EU motor vehicle imports

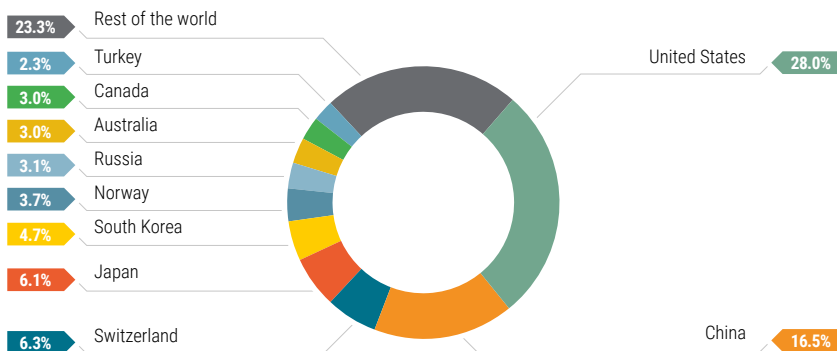
IN UNITS / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	2,629,622	3,034,546	3,405,268	3,903,869	4,203,484	4,164,474	-0.9	100.0
Turkey	708,860	842,209	988,571	1,110,898	1,106,049	1,044,247	-5.6	25.1
Japan	438,278	481,314	580,691	646,682	681,221	762,483	11.9	18.3
South Korea	349,230	376,181	404,076	520,098	541,654	539,048	-0.5	12.9
United States	243,228	251,581	264,169	258,857	280,617	369,042	31.5	8.9
Morocco	168,995	188,370	217,969	264,607	311,305	317,935	2.1	7.6
South Africa	88,170	141,633	188,629	185,920	230,113	286,716	24.6	6.9
China	191,228	214,456	147,371	208,704	389,860	256,842	-34.1	6.2
Mexico	76,142	122,005	138,523	237,580	275,417	222,243	-19.3	5.3
Thailand	68,330	94,917	106,597	106,313	96,069	96,674	0.6	2.3
Switzerland	41,232	48,470	67,805	71,548	73,124	65,114	-11.0	1.6

SOURCE: EUROSTAT

Destinations for EU motor vehicle exports

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

Main destinations for EU motor vehicle exports

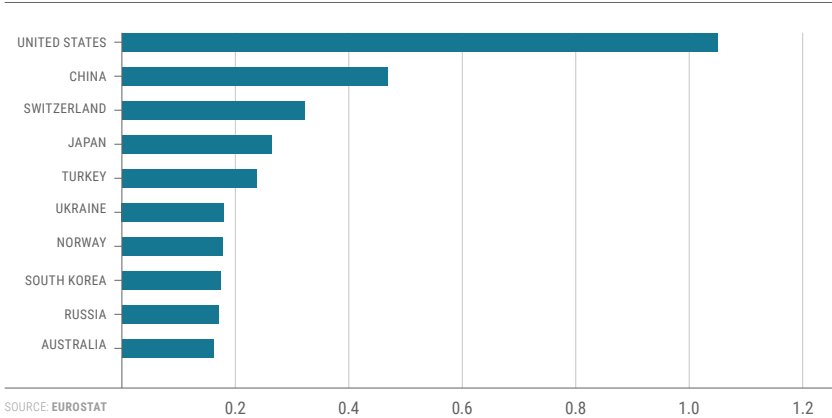
BY VALUE, IN MILLION € / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	125,278	139,349	135,207	142,388	138,347	135,937	-1.7	100.0
United States	30,234	41,145	38,298	38,975	37,898	38,104	0.5	28.0
China	23,735	18,137	19,961	22,657	22,901	22,482	-1.8	16.5
Switzerland	7,374	8,648	8,269	8,429	8,094	8,594	6.2	6.3
Japan	6,031	6,507	7,362	8,204	8,434	8,282	-1.8	6.1
South Korea	4,937	7,234	6,325	6,840	7,356	6,379	-13.3	4.7
Norway	4,110	4,294	4,382	4,838	4,808	5,074	5.5	3.7
Russia	5,809	3,892	3,207	3,602	3,813	4,155	9.0	3.1
Australia	3,958	4,980	5,167	5,373	4,929	4,039	-18.1	3.0
Canada	3,188	3,826	4,094	4,508	4,266	4,032	-5.5	3.0
Turkey	5,971	8,577	8,673	7,554	4,840	3,134	-35.2	2.3

SOURCE: EUROSTAT

Main destinations for EU motor vehicle exports

IN MILLION UNITS / 2019



Main destinations for EU motor vehicle exports

IN UNITS / 2019

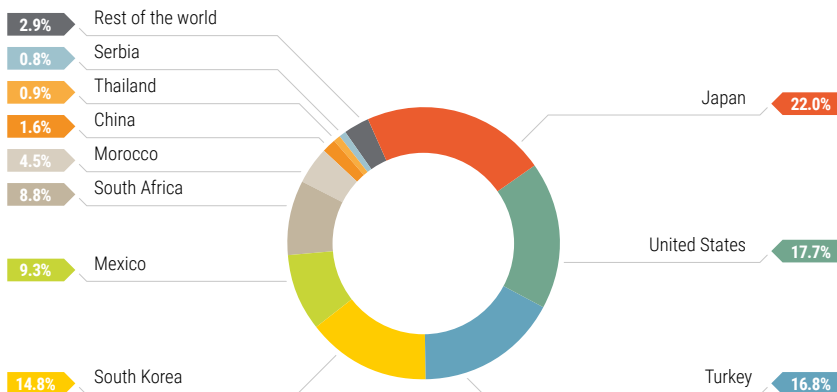
	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	6,063,651	6,084,750	6,254,941	5,983,463	6,023,116	5,610,731	-6.8	100.0
United States	1,010,196	1,271,612	1,200,995	1,190,782	1,171,383	1,053,909	-10.0	18.8
China	613,632	472,698	534,994	580,557	560,916	469,510	-16.3	8.4
Switzerland	301,777	331,908	315,251	303,723	293,217	321,289	9.6	5.7
Japan	237,991	250,839	279,778	282,625	286,451	264,837	-7.5	4.7
Turkey	418,346	592,114	585,255	525,417	315,044	240,200	-23.8	4.3
Ukraine	78,710	44,976	73,924	113,808	110,523	181,510	64.2	3.2
Norway	171,125	176,945	181,191	178,030	228,096	179,908	-21.1	3.2
South Korea	177,603	230,811	182,736	190,653	197,172	175,632	-10.9	3.1
Russia	328,960	191,707	145,352	160,838	185,130	171,857	-7.2	3.1
Australia	183,084	227,920	206,820	210,304	200,267	162,154	-19.0	2.9

SOURCE: EUROSTAT

18.8% of EU vehicle exports go to the United States

Countries of origin of EU passenger car imports

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

Main countries of origin of EU passenger car imports

BY VALUE, IN MILLION € / 2019

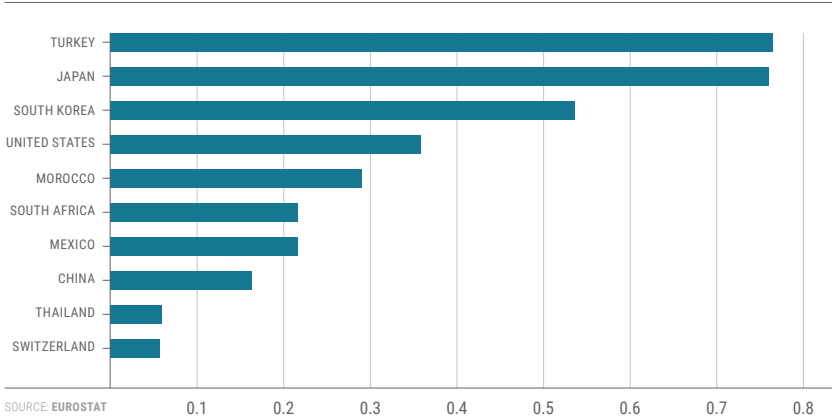
	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	26,216	32,530	38,169	44,831	46,026	53,222	15.6	100.0
Japan	6,654	7,718	9,154	9,709	9,902	11,695	18.1	22.0
United States	4,911	6,964	7,233	6,420	5,539	9,424	70.1	17.7
Turkey	4,374	5,056	6,416	8,579	8,802	8,916	1.3	16.8
South Korea	4,014	4,330	4,812	6,585	7,180	7,866	9.6	14.8
Mexico	1,068	1,642	2,211	4,723	5,248	4,963	-5.4	9.3
South Africa	1,235	2,400	3,104	3,238	4,089	4,676	14.4	8.8
Morocco	1,225	1,369	1,548	1,907	2,257	2,372	5.1	4.5
China	112	104	136	369	482	865	79.4	1.6
Thailand	218	442	472	458	434	465	7.3	0.9
Serbia	1,149	1,035	999	844	655	440	-32.8	0.8

SOURCE: EUROSTAT

The United States accounts for the second highest import value for cars, with a 17.7% share

Main countries of origin of EU passenger car imports

IN MILLION UNITS / 2019



Main countries of origin of EU passenger car imports

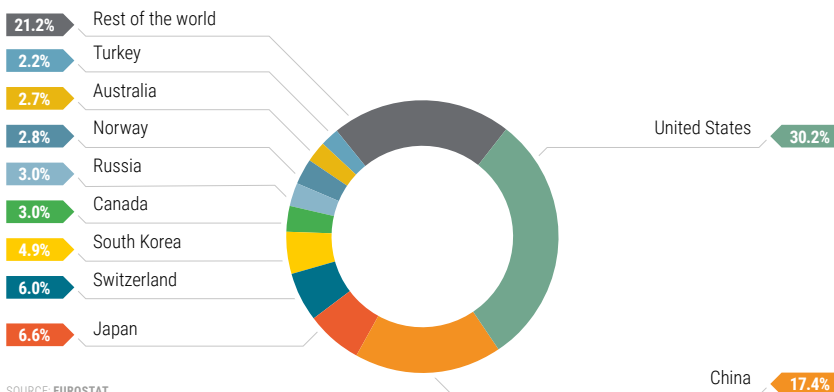
IN UNITS / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	2,223,152	2,463,528	2,858,696	3,326,210	3,651,012	3,617,517	-0.9	100.0
Turkey	474,005	526,500	646,244	789,496	784,937	764,703	-2.6	21.1
Japan	437,238	479,785	578,206	644,698	679,524	760,717	11.9	21.0
South Korea	348,260	374,765	402,956	519,136	540,732	537,341	-0.6	14.9
United States	234,974	243,104	254,979	242,102	267,515	358,044	33.8	9.9
Morocco	152,588	169,823	196,739	240,908	283,622	292,148	3.0	8.1
South Africa	69,223	122,143	161,797	154,025	191,369	218,219	14.0	6.0
Mexico	75,539	121,075	137,249	235,533	271,883	217,856	-19.9	6.0
China	117,886	86,450	70,208	116,668	321,250	164,606	-48.8	4.6
Thailand	32,393	64,238	65,920	64,052	62,109	60,071	-3.3	1.7
Switzerland	35,617	42,314	61,053	64,151	65,914	58,523	-11.2	1.6

SOURCE: EUROSTAT

Destinations for EU passenger car exports

VALUE MARKET SHARE / 2019



Main destinations for EU passenger car exports

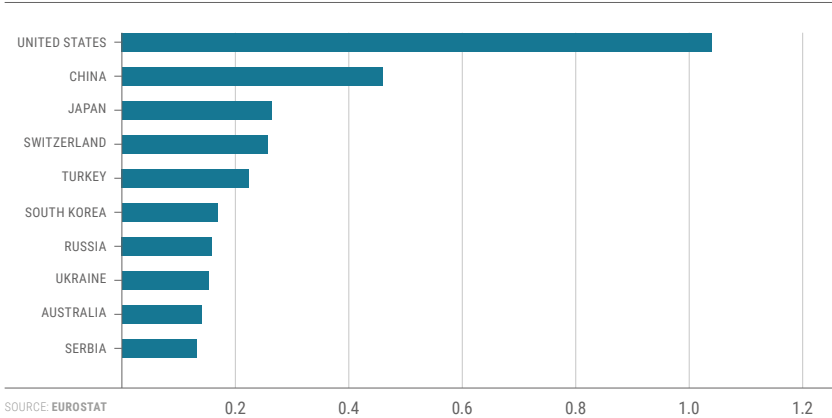
BY VALUE, IN MILLION € / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	115,117	129,049	124,850	131,605	127,568	124,614	-2.3	100.0
United States	29,779	40,466	37,721	38,335	37,242	37,631	1.0	30.2
China	23,492	17,948	19,741	22,337	22,311	21,734	-2.6	17.4
Japan	5,999	6,465	7,340	8,185	8,408	8,247	-1.9	6.6
Switzerland	6,393	7,619	7,332	7,432	7,044	7,494	6.4	6.0
South Korea	4,694	6,910	5,791	6,314	6,965	6,131	-12.0	4.9
Canada	3,014	3,640	3,904	4,317	4,018	3,697	-8.0	3.0
Russia	5,207	3,667	2,926	3,120	3,388	3,689	8.9	3.0
Norway	3,183	3,375	3,325	3,744	3,722	3,497	-6.0	2.8
Australia	3,482	4,593	4,603	4,652	3,950	3,373	-14.6	2.7
Turkey	5,147	7,454	7,772	6,544	4,295	2,758	-35.8	2.2

SOURCE: EUROSTAT

Main destinations for EU passenger car exports

IN MILLION UNITS / 2019



Main destinations for EU passenger car exports

IN UNITS / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	5,528,952	5,562,996	5,427,673	5,489,098	5,369,240	5,000,566	-6.9	100.0
United States	998,503	1,223,019	1,170,612	1,176,829	1,154,784	1,040,770	-9.9	20.8
China	608,912	469,761	531,325	575,284	543,643	459,623	-15.5	9.2
Japan	237,149	247,832	279,188	282,332	285,434	263,057	-7.8	5.3
Switzerland	272,946	303,103	282,378	275,091	261,982	258,195	-1.4	5.2
Turkey	374,603	531,720	534,169	466,574	290,627	224,240	-22.8	4.5
South Korea	174,614	227,065	176,710	184,805	191,863	168,660	-12.1	3.4
Russia	302,184	181,457	134,420	147,073	174,492	159,020	-8.9	3.2
Ukraine	28,187	28,008	51,774	89,893	87,028	151,592	74.2	3.0
Australia	162,756	206,701	188,595	189,824	168,801	140,179	-17.0	2.8
Serbia	71,021	88,487	115,587	117,464	138,064	132,128	-4.3	2.6

SOURCE: EUROSTAT

Vehicles in use



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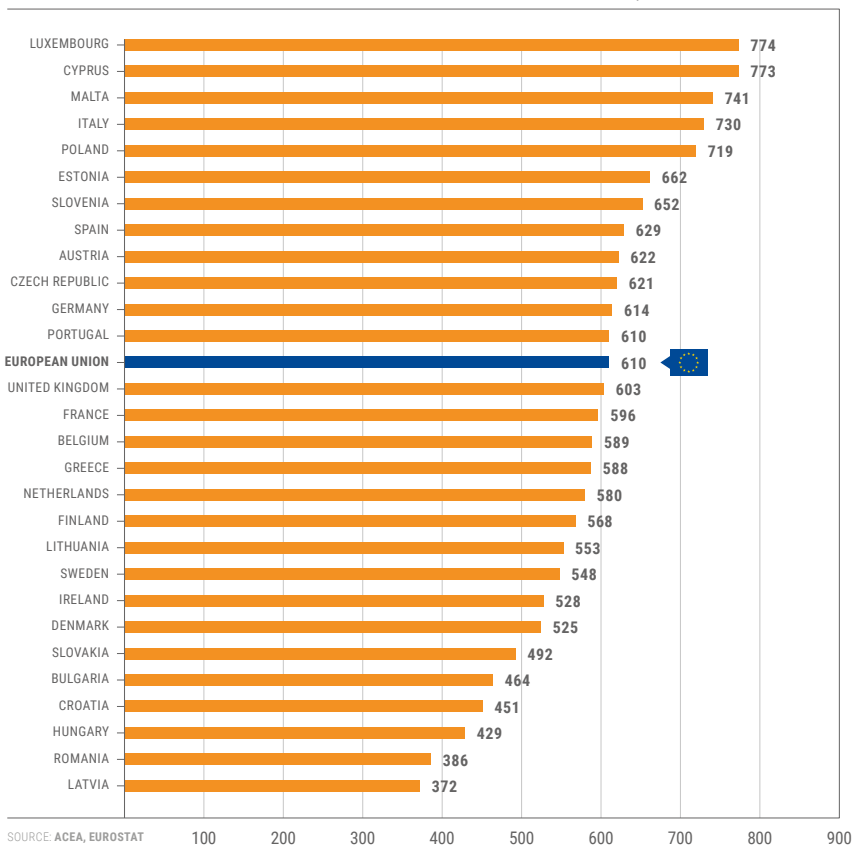
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Motorisation rates in the EU

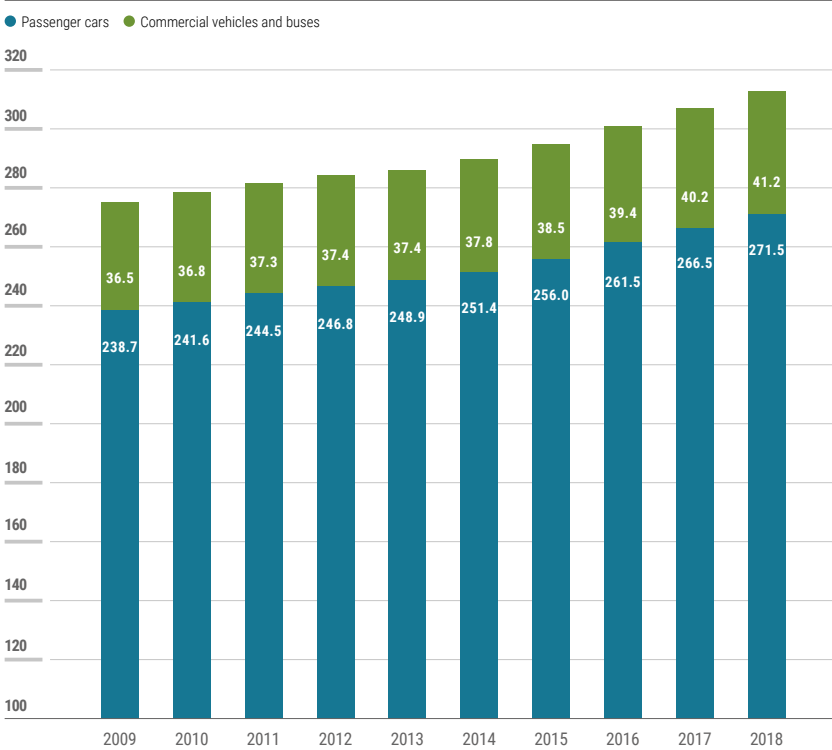
VEHICLES PER 1,000 INHABITANTS / 2018



**The EU counts 610 motor vehicles
per 1,000 inhabitants**

EU vehicle fleet: size and distribution

IN MILLION UNITS / 2009 – 2018



SOURCE: ACEA, EUROSTAT

Cars make up 87% of the EU vehicle fleet

Average age of the EU vehicle fleet

BY COUNTRY, IN YEARS / 2018

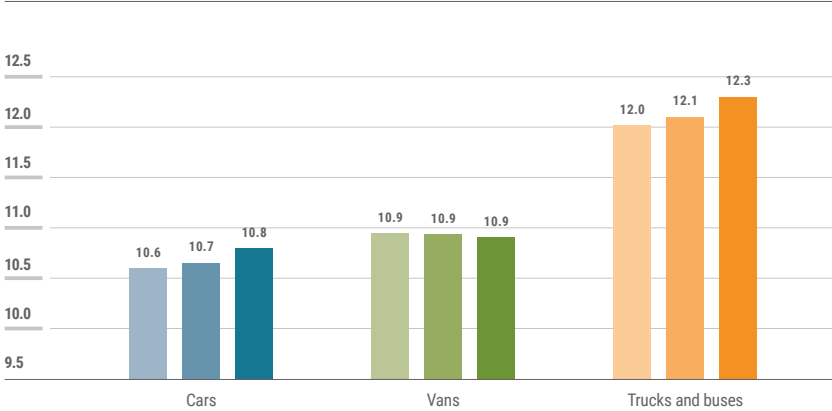


SOURCE: ACEA VEHICLES IN USE REPORT 2019

1. Light commercial vehicles up to 3.5t
 2. Medium and heavy commercial vehicles over 3.5t
 3. Buses and coaches over 3.5t

Average age of the EU fleet

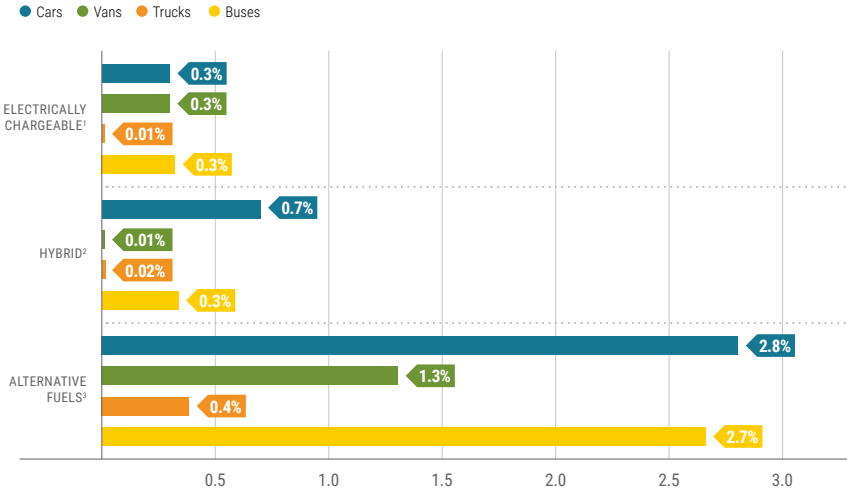
BY VEHICLE TYPE, IN YEARS / 2016 - 2018



SOURCE: ACEA, IHS MARKIT

Share of alternatively-powered vehicles in the EU fleet

BY SEGMENT, %SHARE / 2018



SOURCE: ACEA VEHICLES IN USE REPORT 2019

1. Includes battery and plug-in hybrid electric vehicles
2. Includes full and mild hybrids
3. Includes LPG and natural gas vehicles

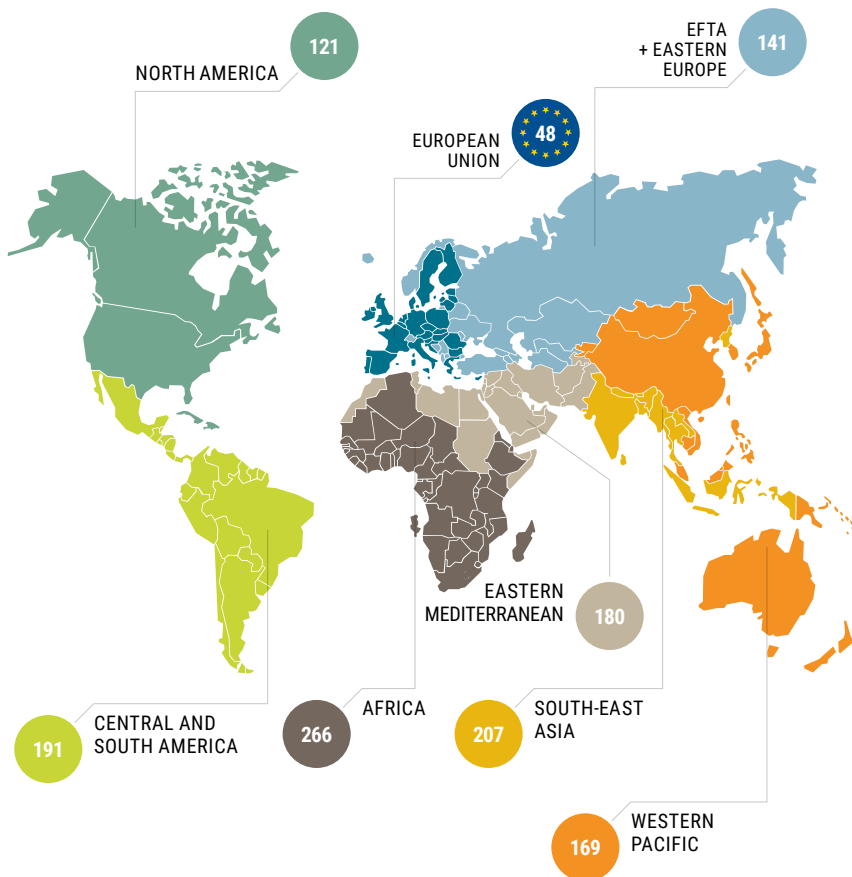
**0.3% of all passenger cars on EU roads
are electrically-chargeable**

Road safety





Road fatalities per million inhabitants

BY REGION¹ / 2016

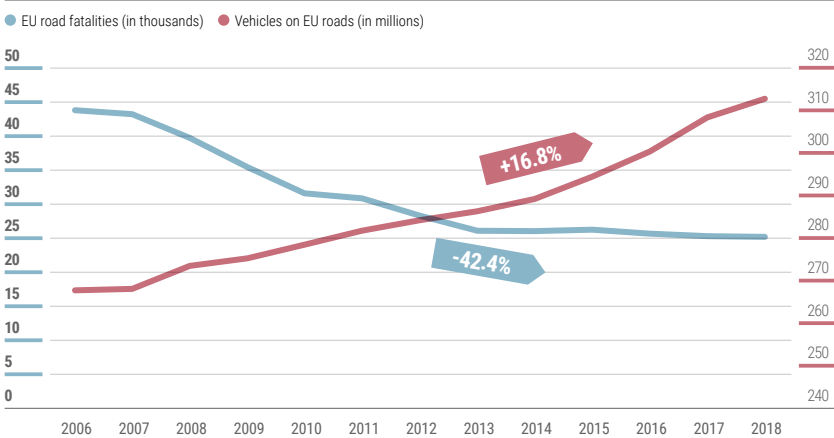
WORLD

182 road fatalities per million inhabitants

SOURCE: CARE (EU ROAD ACCIDENTS DATABASE), WHO (WORLD HEALTH ORGANIZATION)

1. WHO regions

Number of motor vehicles and road fatalities in the EU 2006 – 2018



SOURCE: ACEA, CARE (EU ROAD ACCIDENTS DATABASE)

Number of motor vehicles and road fatalities in the EU 2006 – 2018

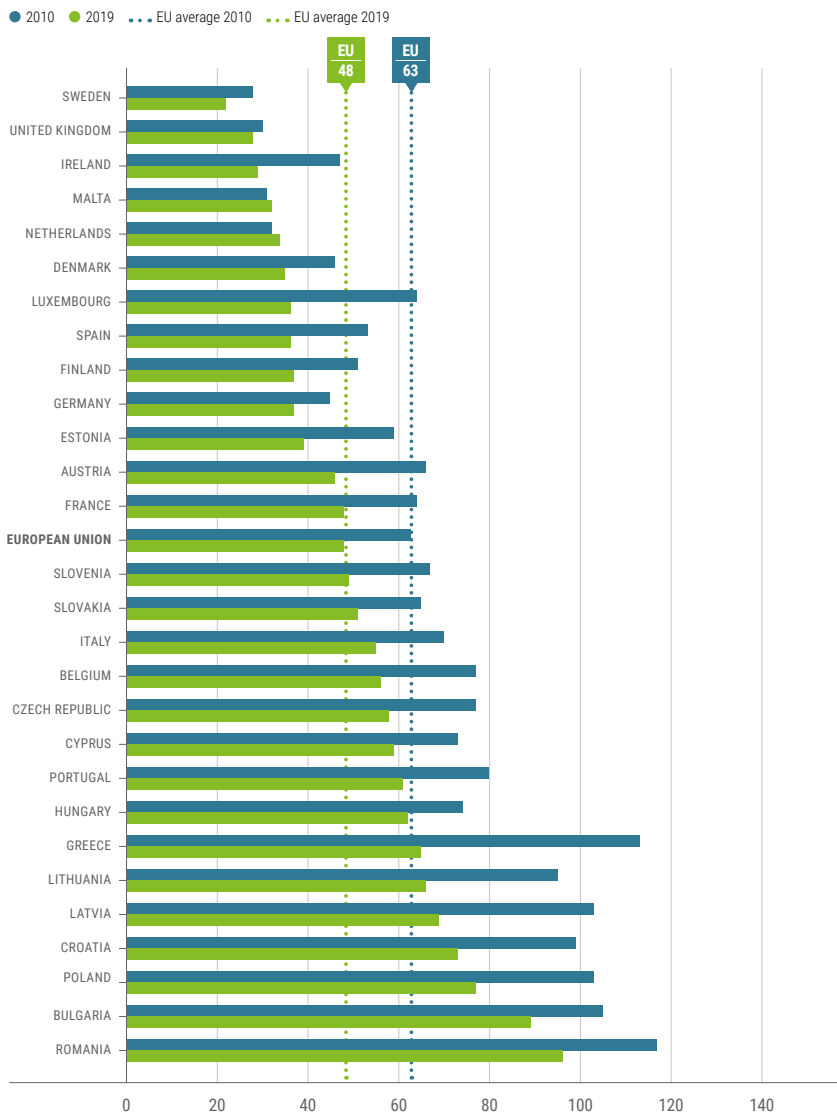
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU road fatalities (in thousands)	43.8	43.2	39.7	35.4	31.6	30.8	28.3	26.1	26.0	26.2	25.7	25.3	25.2
Vehicles on EU roads (in millions)	267.8	268.0	273.5	275.2	278.4	281.7	284.2	286.3	289.1	294.4	300.3	308.3	312.7

SOURCE: ACEA, CARE (EU ROAD ACCIDENTS DATABASE)

While there are 45 million more vehicles on EU roads, fatalities have fallen by 42.4% since 2006

Road fatalities per million inhabitants

BY COUNTRY / 2010, 2019

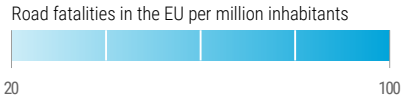
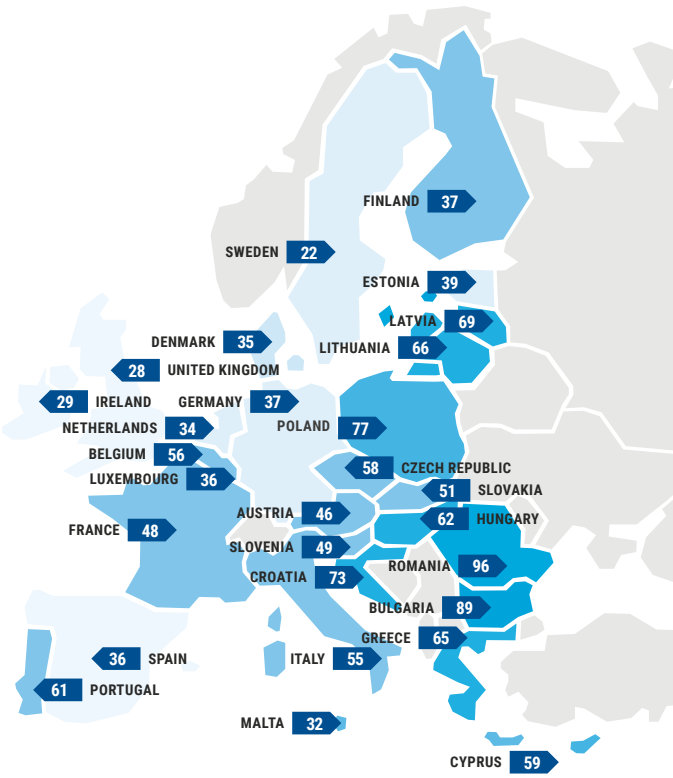


SOURCE: CARE (EU ROAD ACCIDENTS DATABASE)

Road fatality statistics in the EU

BY COUNTRY / 2019

	2019 road fatalities	% change 19 / 18
Austria	416	1.7
Belgium	620	2.6
Bulgaria	628	2.8
Croatia	297	-6.3
Cyprus	52	6.1
Czech Republic	617	-6.2
Denmark	199	13.7
Estonia	52	-22.4
Finland	209	-12.6
France	3,244	-0.1
Germany	3,059	-6.6
Greece	699	-0.1
Hungary	602	-4.9
Ireland	141	0.7
Italy	3,130	-6.1
Latvia	132	-10.8
Lithuania	184	6.4
Luxembourg	22	-38.9
Malta	16	-11.1
Netherlands	661	-2.5
Poland	2,909	1.6
Portugal	614	-9.0
Romania	1,864	-0.2
Slovakia	245	7.0
Slovenia	102	12.1
Spain	1,724	-4.5
Sweden	221	-31.8
United Kingdom	1,926	4.7
EUROPEAN UNION	24,585	-2.5



SOURCE: CARE (EU ROAD ACCIDENTS DATABASE)

Road fatalities declined by 2.5% in the EU in 2019

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2020/2021

Environment



ENVIRONMENT



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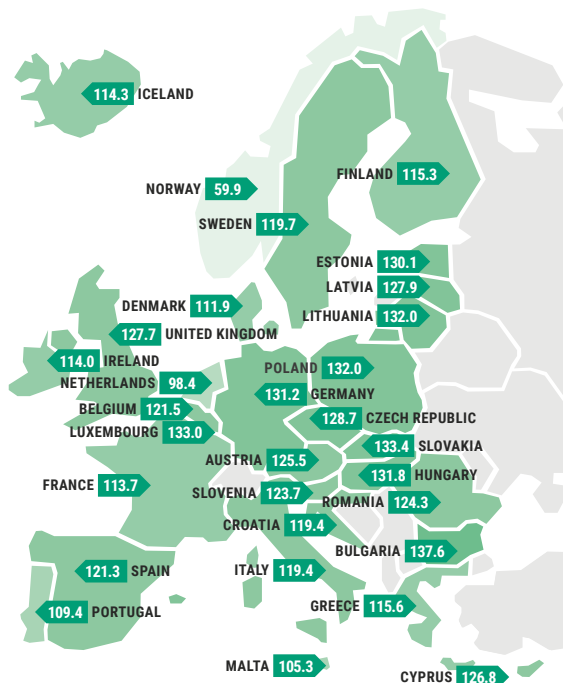


Average CO2 emissions of new passenger cars by country

IN G CO2/KM / 2019

	2019 average emissions	% change 19 / 18
Austria	125.5	2.0
Belgium	121.5	1.6
Bulgaria	137.6	7.8
Croatia	119.4	3.5
Cyprus	126.8	2.7
Czech Republic	128.7	2.1
Denmark	111.9	2.1
Estonia	130.1	-1.7
Finland	115.3	-1.2
France	113.7	1.4
Germany	131.2	1.4
Greece	115.6	3.8
Hungary	131.8	3.0
Ireland	114.0	0.6
Italy	119.4	2.6
Latvia	127.9	-0.8
Lithuania	132.0	2.6
Luxembourg	133.0	1.2
Malta	105.3	-2.2
Netherlands	98.4	-6.8
Poland	132.0	1.7
Portugal	109.4	2.9
Romania	124.3	2.3
Slovakia	133.4	5.1
Slovenia	123.7	2.3
Spain	121.3	2.7
Sweden	119.7	-2.1
United Kingdom	127.7	2.5
EUROPEAN UNION	123.0	1.8
Iceland	114.3	-2.1
Norway	59.9	-
EU28 + IS + NO	122.4	-

SOURCE: EEA

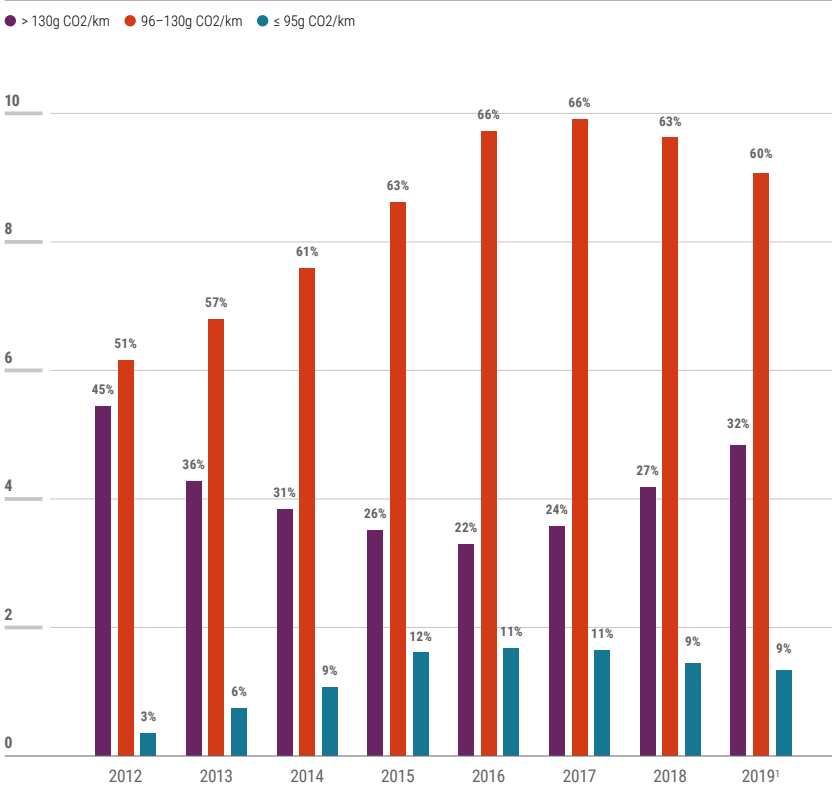


Average CO2 emissions from new passenger cars by country in g CO2/km in 2019



New passenger cars in the EU by emissions classes

IN MILLION UNITS, % SHARE / 2012 – 2019



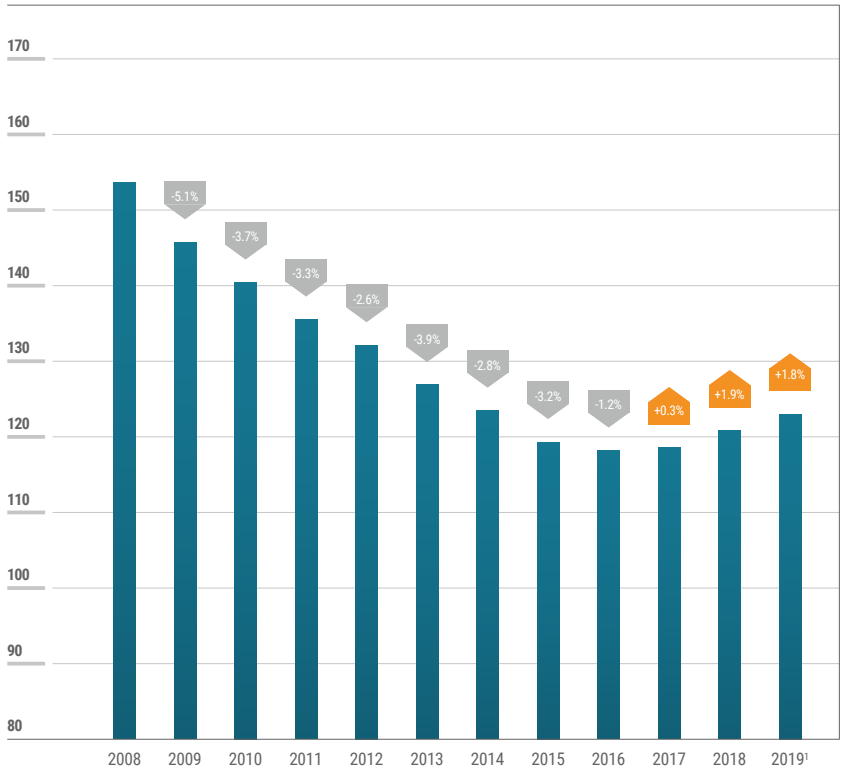
SOURCE: EEA

1. Provisional figures

**Almost 70% of all new cars sold
emit less than 130g CO2/km**

Average CO₂ emissions of new passenger cars in the EU

IN G CO₂/KM, % CHANGE / 2008 – 2019

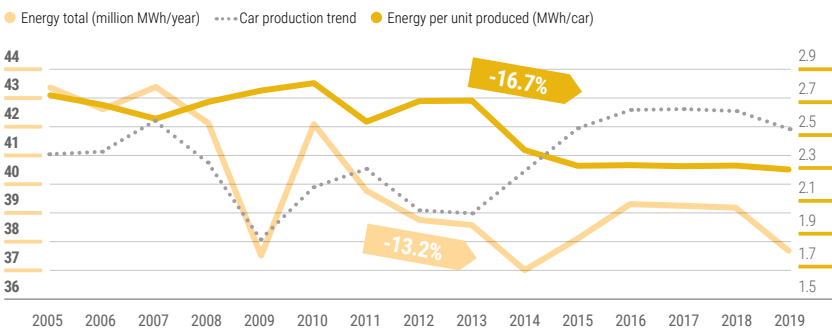


SOURCE: EEA

1. Provisional figures

Energy consumption during production

2005 – 2019

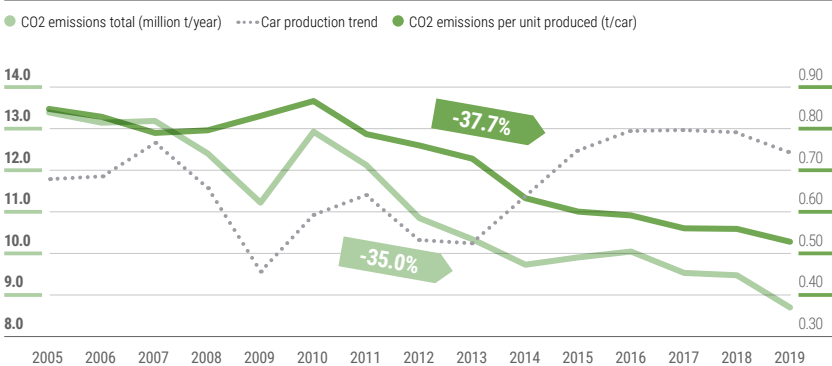


SOURCE: ACEA MEMBERS

As cars have become equipped with ever more features to make them safer, cleaner and smarter, the complexity of vehicle production has increased. This increase in complexity affects energy demand. Nevertheless, manufacturers have been working continuously to improve the **energy efficiency** of production. As a result, energy consumption per car produced has been decreased by 16.7% over the last 15 years.

CO2 emissions from production

2005 – 2019



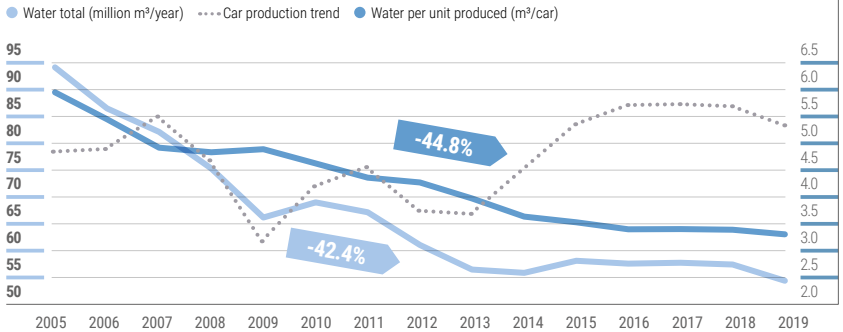
SOURCE: ACEA MEMBERS

The **CO2 emissions** per car produced dropped by 37.7% between 2005 and 2019, while the overall figure went down by 35.0% over the same period, reflecting the industry's efforts to reduce CO2 emissions from production. Even though car production has increased by 4.3% since 2005, manufacturers have been able to decouple CO2 emissions from production growth by increasingly sourcing energy from renewable and/or low-carbon sources.

CO2 emissions per car produced dropped by 38% between 2005 and 2019

Water used in production

2005 – 2019

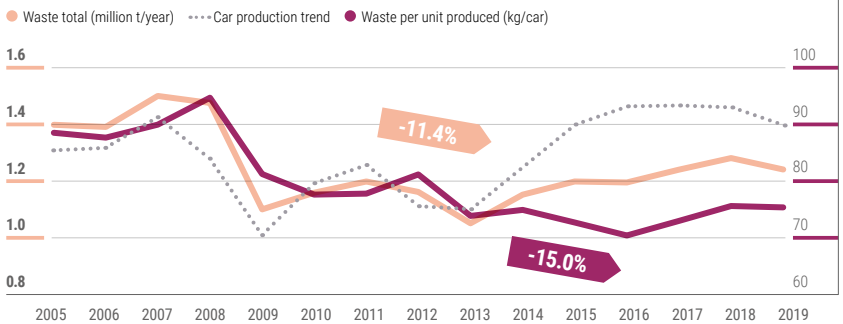


SOURCE: ACEA MEMBERS

Long-term strategies for reducing **water consumption** have made it possible to reduce water use per car produced by 44.8% between 2005 and 2019. This includes the increased application of recirculation technologies for the reuse of water.

Waste from production¹

2005 – 2019



SOURCE: ACEA MEMBERS

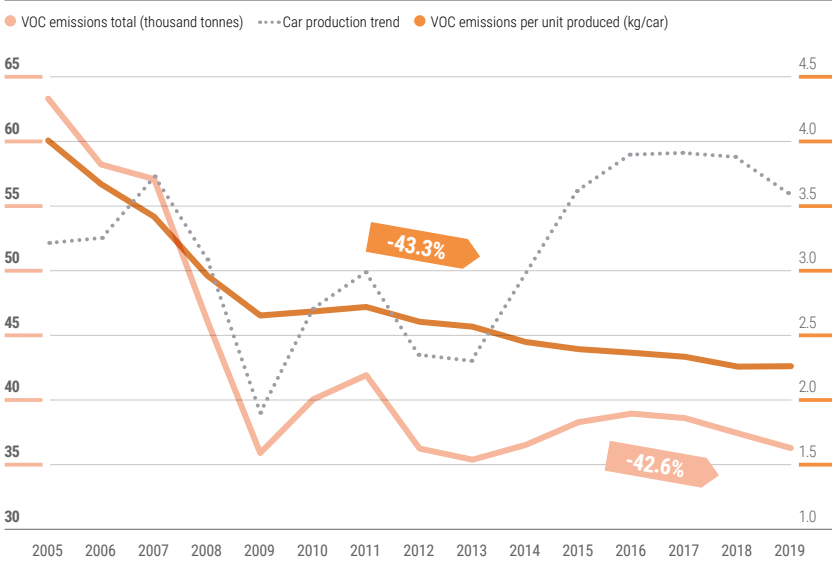
1. Excluding scrap metal and demolition waste

The **waste** generated per unit produced by the manufacturing of passenger cars went down by 15% over 15 years. Waste fluctuations, both in absolute and per unit terms can be explained by the occurrence of singular events, such as a fall in total production during the economic crisis.

**Water consumption per car produced
has been reduced by 45% since 2005**

VOC emissions from production

2005 – 2019



SOURCE: ACEA MEMBERS

Volatile organic compounds (VOC) are organic solvents mainly emitted from paint shops. The graph shows VOC emissions per car produced and the absolute emissions of all car manufacturers combined. With new technologies, such as the replacement of solvent-based paints with solvent-free, water-based equivalents manufacturers have been able to reduce unit emissions by 43.3% over the last 15 years.

European manufacturers have significantly reduced the environmental impact of car production over the last 15 years

Innovation



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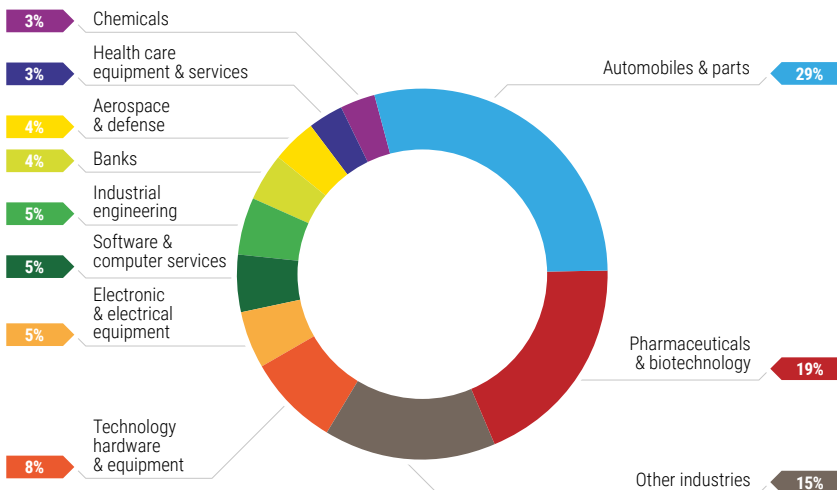
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R&D shares of sectors in the EU

%SHARE / 2018



SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

EU R&D investment in the top 10 industrial sectors

IN BILLION € / 2018

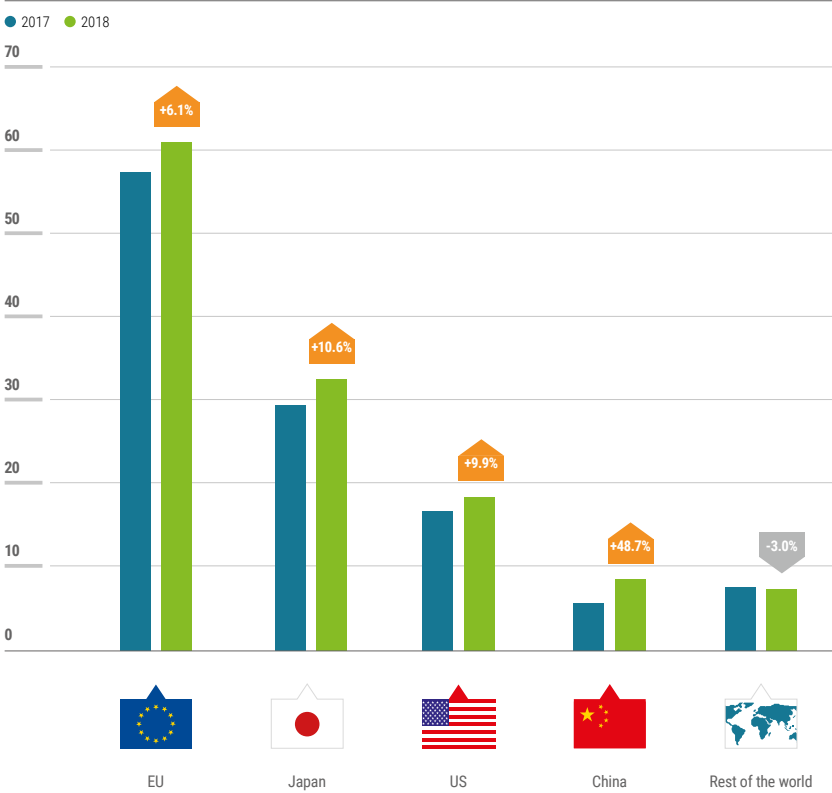
Automobiles & parts	60.9
Pharmaceuticals & biotechnology	39.9
Technology hardware & equipment	15.9
Electronic & electrical equipment	10.9
Software & computer services	10.5
Industrial engineering	9.9
Banks	9.3
Aerospace & defense	9.3
Health care equipment & services	5.5
Chemicals	5.2

SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

The automotive sector is the EU's number one investor in R&D, responsible for 29% of total spending

R&D investment in the automobile sector by world region

IN BILLION € / % CHANGE

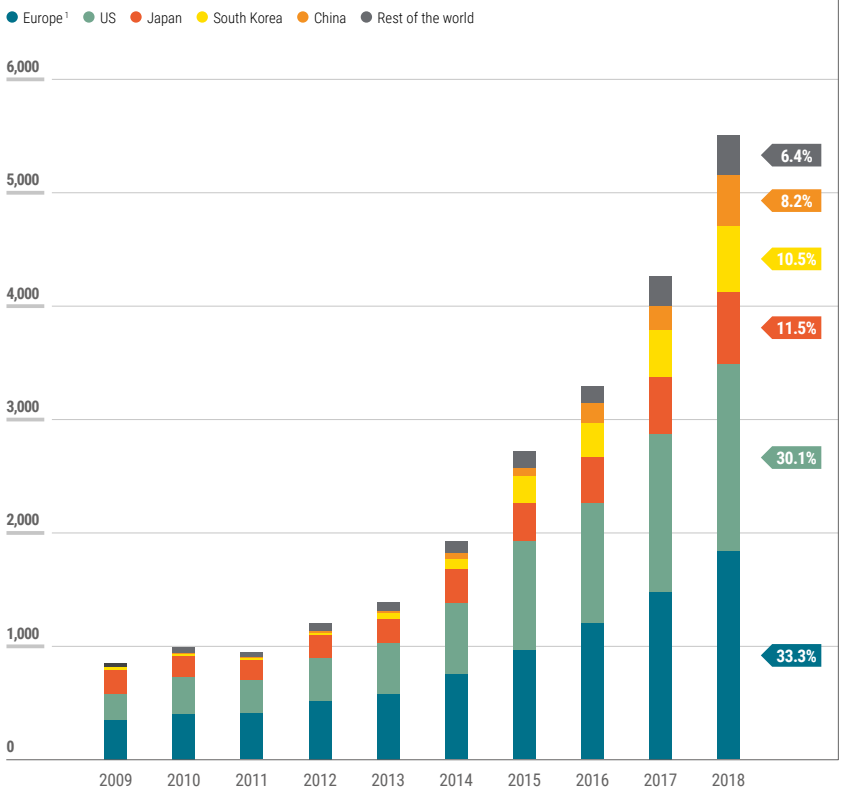


SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

**EU investment in automotive R&D
has increased by 6.1% to €60.9 billion annually**

Patent applications related to self-driving vehicles

NUMBER OF PATENTS, % SHARE / 2009 – 2018



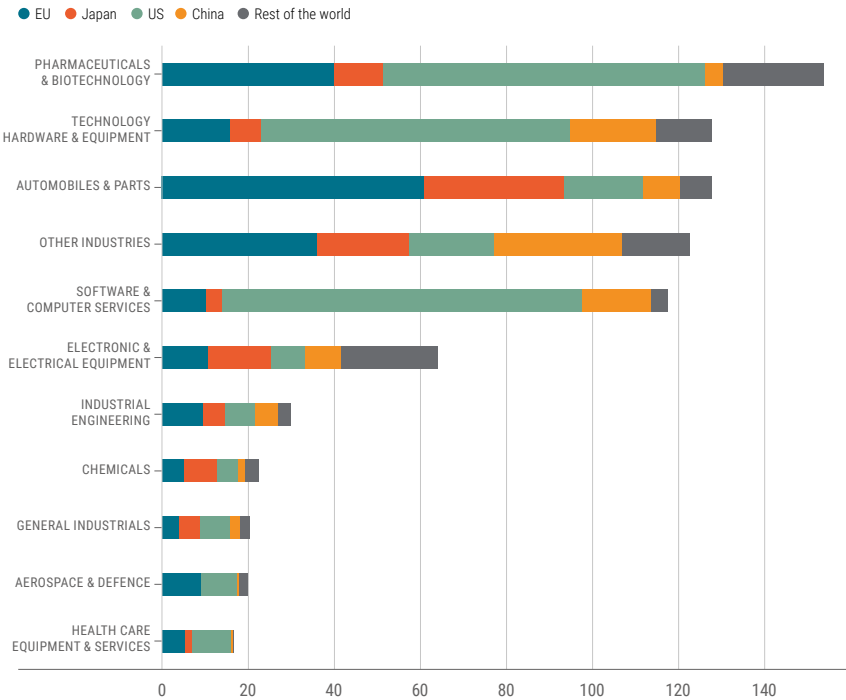
SOURCE: EPO (EUROPEAN PATENT OFFICE)

1. European Patent Convention (EPC)

Europe leads the world in patents for self-driving vehicles

R&D investment by industry and world region

IN BILLION € / 2018



SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

The EU is by far the world's largest investor in automotive R&D

Taxation



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
























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Electric vehicles: tax benefits and purchase incentives

2020

		TAX BENEFITS			INCENTIVES
		ACQUISITION	OWNERSHIP	COMPANY CAR	
	AUSTRIA	✓	✓	✓	✓
	BELGIUM	✓	✓	✓	✗
	BULGARIA	✗	✓	✗	✗
	CROATIA	✓	✓	✗	✓
	CYPRUS	✓	✓	✗	✗
	CZECH REPUBLIC	✓	✓	✗	✓
	DENMARK	✓	✓	✓	✗
	ESTONIA	✗	✗	✗	✓
	FINLAND	✓	✓	✗	✓
	FRANCE	✓	✗	✓	✓
	GERMANY	✓	✓	✓	✓
	GREECE	✓	✓	✓	✓
	HUNGARY	✓	✓	✓	✓
	IRELAND	✓	✓	✓	✓
	ITALY	✗	✓	✗	✓
	LATVIA	✓	✓	✓	✗
	LITHUANIA	✗	✗	✗	✗
	LUXEMBOURG	✗	✓	✓	✓
	MALTA	✓	✓	✗	✗
	NETHERLANDS	✓	✓	✓	✓
	POLAND	✓	✗	✗	✓
	PORTUGAL	✓	✓	✓	✓
	ROMANIA	✗	✓	✗	✓
	SLOVAKIA	✓	✓	✗	✓
	SLOVENIA	✓	✗	✗	✓
	SPAIN	✓	✓	✗	✓
	SWEDEN	✗	✓	✓	✓
	UNITED KINGDOM	✓	✓	✓	✓

SOURCE: ACEA TAX GUIDE 2020

**Purchase incentives for electric vehicles
are available in 23 countries**















CO2-based motor vehicle taxation

2020

		TAX MEASURES	ACQUISITION	OWNERSHIP	COMPANY CAR
	AUSTRIA	✓	✓	✗	✓
	BELGIUM	✓	✓	✓	✓
	BULGARIA	✗	✗	✗	✗
	CROATIA	✓	✗	✗	✗
	CYPRUS	✓	✓	✓	✗
	CZECH REPUBLIC	✓	✓	✗	✗
	DENMARK	✗	✗	✗	✓
	ESTONIA	✗	✗	✗	✗
	FINLAND	✓	✓	✓	✗
	FRANCE	✓	✓	✓	✓
	GERMANY	✗	✗	✓	✓
	GREECE	✓	✓	✓	✗
	HUNGARY	✗	✗	✗	✗
	IRELAND	✓	✓	✓	✗
	ITALY	✓	✓	✗	✗
	LATVIA	✗	✗	✓	✗
	LITHUANIA	✗	✗	✗	✗
	LUXEMBOURG	✗	✗	✓	✓
	MALTA	✓	✓	✓	✗
	NETHERLANDS	✓	✓	✓	✓
	POLAND	✗	✗	✗	✗
	PORTUGAL	✓	✓	✓	✗
	ROMANIA	✓	✓	✗	✗
	SLOVAKIA	✗	✗	✗	✗
	SLOVENIA	✓	✓	✗	✗
	SPAIN	✓	✓	✗	✓
	SWEDEN	✓	✓	✓	✗
	UNITED KINGDOM	✓	✓	✓	✓

SOURCE: ACEA TAX GUIDE 2020

Fiscal income from motor vehicles in major European markets¹

	 AT	 BE	 DE	 DK	 ES	 FI	 FR
	€ bn 2017	€ bn 2018	€ bn 2018	DKK bn 2018	€ bn 2018	€ bn 2018	€ bn 2018
Purchase or transfer							
1. VAT on vehicle sales servicing, repair & parts	3.1	7.4	31.3	–	5.0	1.7	18.5
2. Sales & registration taxes	0.5	0.5	–	20.7	0.5	1.0	2.3
3. Annual ownership taxes	2.4	1.7	9.0	9.9	2.9	1.2	0.9
4. Fuels & lubricants	5.4	8.8	41.7	17.5	20.8	3.9	42.8
5. Others							
Driving license fees	–	0.02	0.2	–	0.1	–	–
Insurance taxes	0.4	1.0	5.3	1.5	–	0.4	5.1
Tolls	2.1	0.7	5.7	0.5	–	–	12.6
Customs duties	–	–	0.2	–	–	–	–
Other taxes	0.4	0.7	–	–	0.7	–	1.7
TOTAL (national currencies)	14.3	20.7	93.4	50.1	30.0	8.1	83.9
TOTAL (EURO)³	14.3	20.7	93.4	6.7	30.0	8.1	83.9
	 GR	 IE	 IT	 NL	 PT	 SE	 UK
	€ bn 2019	€ bn 2019	€ bn 2018	€ bn 2019	€ bn 2019	SEK bn 2019	£ bn 2018/2019 ²
Purchase or transfer							
1. VAT on vehicle sales servicing, repair & parts	0.3	0.7	18.6	1.2	4.5	25.0	12.5
2. Sales & registration taxes	0.3	1.0	1.8	2.2	0.7	–	–
3. Annual ownership taxes	1.2	0.9	6.8	4.3	0.7	13.9	6.5
4. Fuels & lubricants	5.6	3.5	37.8	10.4	3.5	45.0	28.0
5. Others							
Driving license fees	–	0.02	–	0.3	–	–	–
Insurance taxes	–	0.1	3.9	1.2	–	2.8	–
Tolls	–	–	2.2	0.2	0.2	2.7	–
Customs duties	–	–	–	–	–	–	–
Other taxes	0.1	–	5.3	1.8	–	–	1.5
TOTAL (national currencies)	7.4	6.2	76.3	21.5	9.6	89.4	48.5
TOTAL (EURO)³	7.4	6.2	76.3	21.5	9.6	8.1	54.1

GRAND TOTAL = € 440.4 billion

SOURCE: ACEA TAX GUIDE 2020

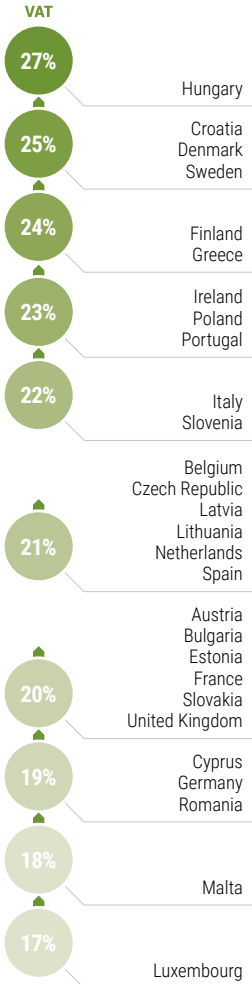
1. Latest available data; only countries for which sourced data is available are listed

2. 2012 estimates for income from VAT and other taxes

3. Euro foreign exchange reference rates at 30 March 2020; source: ECB



**Motor vehicles account for €440.4 billion
in taxes in major European markets**

Share of VAT in net price of cars



SOURCE: ACEA TAX GUIDE 2020

Excise duties on fuels in €/1,000 litres

	UNLEADED PETROL 	DIESEL 
Austria	515	425
Belgium	600	600
Bulgaria	363	330
Croatia	520	413
Cyprus	429	400
Czech Republic	499	425
Denmark	631	429
Estonia	563	493
Finland	702	530
France	683	594
Germany	654	470
Greece	700	410
Hungary	366	338
Ireland	602	495
Italy	728	617
Latvia	509	414
Lithuania	466	372
Luxembourg	472	355
Malta	549	472
Netherlands	800	503
Poland	383	337
Portugal	643	486
Romania	373	342
Slovakia	555	393
Slovenia	547	469
Spain	504	379
Sweden	619	436
United Kingdom	651	651
EU minimum rates	359	330

SOURCE: ACEA TAX GUIDE 2020

Automobiles provide a vital source of government revenue

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2020/2021

About ACEA



ACEA

European
Automobile
Manufacturers
Association

WWW.242EA.BE

ACEA represents Europe's car, van, truck and bus makers

Members and partners

The European Automobile Manufacturers' Association (ACEA) is the advocate for the automobile industry in Europe, representing the 16 major manufacturers of passenger cars, vans, trucks and buses with production sites in the EU.

ACEA's members are: BMW Group, CNH Industrial, DAF Trucks, Daimler, Ferrari, Fiat Chrysler Automobiles, Ford of Europe, Honda Motor Europe, Hyundai Motor Europe, Jaguar Land Rover, PSA Group, Renault Group, Toyota Motor Europe, Volkswagen Group, Volvo Cars and Volvo Group.

ACEA has permanent cooperation with the European Council for Automotive R&D (EUCAR), which is the industry body for collaborative research and development.

ACEA works closely with the 29 national automobile manufacturers' associations in Europe, and maintains a dialogue on international issues with automobile associations around the world.

BMW GROUP  

CNH INDUSTRIAL

DAF

DAIMLER

Ferrari

FCA
FIAT CHRYSLER AUTOMOBILES

Ford

HONDA
The Power of Dreams

HYUNDAI

JAGUAR 

PSA
GROUPE

GROUPE RENAULT

TOYOTA

VOLKSWAGEN
AKTIENGESELLSCHAFT

VOLVO

VOLVO
TRUCK & BUSES

ACEA's mission and priority areas

ACEA's mission

- Define and advocate the common interests, policies and positions of the European automobile industry.
- Engage in dialogue with the European institutions and other stakeholders in order to advance understanding of industry issues, and to contribute to effective policy and legislation at both European and global levels.
- Act as a portal for expert knowledge on vehicle-related regulation.
- Communicate the role and importance of the industry, using reliable data and information.
- Monitor activities that affect the automobile industry, cooperating with the other stakeholders involved.
- Undertake strategic reflection on the increasingly global challenges of mobility, sustainability and competitiveness.

Priority fields

Through its member companies, ACEA taps into a wealth of technical, regulatory and practical expertise in the following priority fields:

- Connected and automated driving
- Competitiveness, market and economy
- Environment and sustainability
- International trade
- Research and innovation
- Road safety
- Transport policy

How ACEA works

The ACEA Board of Directors is composed of the CEOs and Presidents of its member companies. Additionally, a Commercial Vehicle Board of Directors addresses the specific issues that face the commercial vehicle manufacturers that ACEA represents for Trucks: Ford Trucks, DAF Trucks, Daimler Trucks, Iveco, MAN Truck & Bus, Scania, and Volvo Group.

The day-to-day work of the ACEA secretariat is overseen by the Director General, who ensures that the Board of Directors' priorities are addressed. Technical expertise and advisory input comes from working groups on topics as diverse as emissions, road and vehicle safety, general transport policy, and regulatory compliance. These specialist working groups are made up of experts from the member companies.



About EUCAR

The European Council for Automotive R&D (EUCAR) is the collaborative research organisation of the major automobile manufacturers in Europe, with the mission to strengthen the competitiveness of the manufacturers through strategic collaborative research and innovation.

EUCAR is committed to help society achieve safer, cleaner, smarter and more efficient transport solutions. Together with its members, EUCAR drives the strategy and assessment of collaborative automotive research and innovation, and establishes common work with the European Commission, Member States and other key stakeholders.

EUCAR collaborative research and innovation activities cover both passenger and commercial vehicles, focused on the following strategic pillars:

- Sustainable Propulsion
- Enabling Technologies and Processes
- Safe and Integrated Mobility
- Commercial Vehicles
- Urban Mobility

EUCAR's members participate in high-quality projects with relevant results for the industry. Projects are mainly financed through the European Union Framework Programmes for research and innovation, matched with industry funding.

The EUCAR project book contains an overview of all the current projects:

<https://www.eucar.be/publications/project-book/>

EUCAR is governed by its Council, composed of the heads of the research and advanced development divisions of the member companies. The EUCAR Chairman is nominated annually from the Council on a rotating basis.

EUCAR's members are: BMW Group, CNH Industrial, DAF Trucks, Fiat Chrysler Automobiles, Ford of Europe, Honda R&D Europe, Hyundai Motor Europe, Jaguar Land Rover, PSA Groupe, Groupe Renault, Toyota Motor Europe, Volkswagen Group, Volvo Cars, and Volvo Group.

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ACEA

European
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