



Report 08-09

Aragon Automotive Cluster (CAAR)





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Over the last few decades, the automotive industry has acquired a great degree of importance in the economy in Aragón and, currently, it is the primary industrial sector in our Region - employing over 28,000 people and producing around 3.5% of the Gross Value Added. The business range of the automotive sector spans large companies - often subsidiaries of large multi-nationals - whose products are for the final consumer to micro-companies that are almost handicrafts, supplying goods to the next cog on the wheel in the value chain.

This is a large group of companies which, despite the recent turbulent times, have maintained their position as the industry's driving force in Aragón - with the level of employment remaining virtually stable even in the light of having to brusquely adjust production levels. Through the development of various activities and investments, this group is placing itself very favourably with regard to electric propulsion vehicles - a phenomenon which has appeared as the new paradigm in the automotive sector on a worldwide scale.

It is along this path that the **Aragon Automotive Cluster** and its associated companies must continue, towards improvement in competitiveness through the development of well-run research and development activities which benefit from the synergy derived from the existing potential for research in our Region into the application of the latest process and product technologies in factories, in the increase in managerial skills amongst the managers and in technical matters amongst the workers and, above all, through the position of this industry as a reference point in terms of productivity, competitiveness and flexibility.

As one of the priorities in its economic and industrial policy, the Government of Aragon believes it is vital to support a business sector that shows itself to be a pivotal structure in the economy in Aragon - with the aim being to guarantee growth in economic and employment terms as well as territorial cohesion in Aragon. Therefore, I wish to reiterate our support for this initiative by the **Aragon Automotive Cluster**, in the belief that it is a tool for boosting the competitiveness of the companies it comprises and, indirectly, those companies that are yet to join - all of whom form part of the same sector in our Region.

The primary result of all this activity is that the sector is considered a reference point as suppliers for the majority of car manufacturers at the European level, showing that this is a sector that is relevant at a European level that is well regarded by the major companies in the automotive sector at a world level - meaning that, currently, this is the main exporter in our region, with more than half the sales of Aragon to other countries.

I believe that we are at a turning point at which the companies in the **Aragon Automotive Cluster** must focus their efforts on innovation - both in products and processes - as the best direction down which to head to overcome the difficult times that are upon us and to guarantee a new cycle of expansion that enables the growth of their companies because the success of the Cluster's partners will mean the success of the economy in Aragon.

Marcelino Iglesias Ricou
PRESIDENT OF ARAGON





the main
industrial sector
in our
Autonomous
Region





Dear friend,

While recent circumstances have not been the best for the group of companies in the Automotive Sector in Aragon, the current situation allows us to look towards the future with a certain degree of optimism.

The different measures implemented by the companies and the support coming from both the central and regional administrations are starting to bear fruit. The sector is showing a gentle recovery in production terms, improving individual competitiveness and, above all, enabling the preservation of the strategic industrial body in the Autonomous Region of Aragon.

Thus, the Aragon Automotive Cluster, through its reinforcement as the reference organisation in the sector, has been able to consolidate the industry to a greater extent using the various methods that it is my pleasure to present you in this report on its activities.

The Cluster is a tool for cohesion and collaboration in distinct areas of activity and, through the development of its activities, it has managed to achieve improvements in the areas of innovation management and development, operational efficiency, international expansion and human resources. A fine example of this lies in the nearly €24 million received in the aid grants from the Ministry of Industry's 2009 Competitiveness Plans, which give a good representation of the potential and confidence transmitted by the companies in the auxiliary sector in Aragon, represented to a large extent by the Automotive Cluster.

the **Cluster**, the voice of the auxiliary industry

Meanwhile, the increase in the presence of the sector in the media over the last year has allowed the Cluster to establish itself as the independent voice of the auxiliary industry, informing society about the characteristics, problems and successes of the group of companies through successive appearances in the media and forums as well as via the undertaking of projects - such as the Plan for improved competitiveness in the automotive sector in Aragon, undertaken jointly with the Chamber of Commerce and Industry, which was presented in March 2009.

Therefore, we are dealing with a tool that allows the companies in the sector in Aragon to reach levels of critical mass in particular areas previously thought impossible and to place them as reference points in our region and in Spain in their area of activity.

However, we must not forget the times of change which we are experiencing and we need to be better prepared than ever to face these new paradigms and conditioners that will certainly affect us in the future as an industry and a society. We must continue to journey together, united to guarantee the success of this vitally important industry in Aragon.

Juan Manuel Blanchard
PRESIDENT OF THE ARAGON AUTOMOTIVE CLUSTER



The Thermometer of the Automotive Sector in Aragon

THE SECTOR IN NUMBERS

During the latter half of 2009, the Cluster - in collaboration with the Aragon Council of Chambers of Commerce and Industry - has developed the Thermometer for the Automotive Sector in Aragon, as a tool for the correct sizing and monitoring of all the companies in Aragon that are involved in the automotive sector, in the light of an obvious weakness detected in relation to information available about the sector.

The aim was to surpass the image presented by these figures through the inclusion of activities that have not traditionally been considered as lying within the automotive sector - though they are related through their participation in the value chain.

Thus, companies - whether or not they have declared that their primary activity is the manufacturing of automotive components - with the majority of their invoicing destined to satisfying demands from companies in the sector are considered, as could be the plastics and metal industries whose production is destined for vehicle manufacturers but whose National Classification of Activities (NCA) does not reflect the destination of their products.

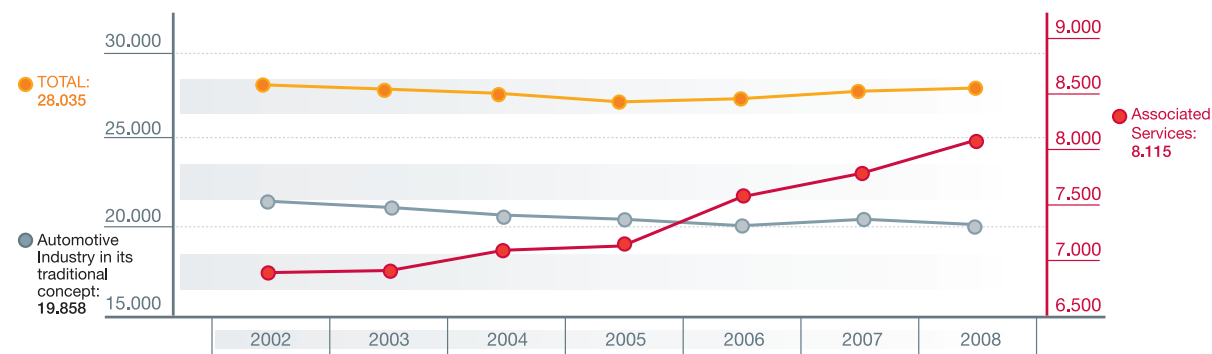
Amongst the defined indicators, companies with services that are directly linked so as to form part of the value chain are also included, taking into consideration data proceeding from sales and repairs of vehicles as well as the business and installation of accessories, plus - with the aim of covering the full range of the lifecycle of the vehicle - the recycling business.



Therefore, we have an employment figure of over 28,000 workers in figures for 2008. This breaks down to a little over 8,000 workers in the previously mentioned so-called associated services - revealing a clear positive trend and demonstrating the dynamism that this area of activities has experienced in recent years with the introduction of phenomena such as personalisation and advanced system technologies of sound and navigation - and the 20,000 jobs in the industry in its traditional concept, a figure that has fallen slowly but continuously over the last few years. These employees are spread around nearly 2,300 companies, showing a wide diversity here: running from the 8 manufacturers of motor vehicles of a large size (bearing in mind the employment generated) to the nearly 1,200 workshops which, as they have an average of 2.5 employees per company, are essentially all micro-companies.

Employment in the Automotive Sector in Aragon

Source: Industrial Company Survey (ICS) + extrapolation from company databases.



These groups provide a little over 5.5 % of the Gross Value Added - with this level having been very stable over recent years - and in concordance with with matters on the national scale, where it is estimated that the sector provides 6 % of the Gross Domestic Product.

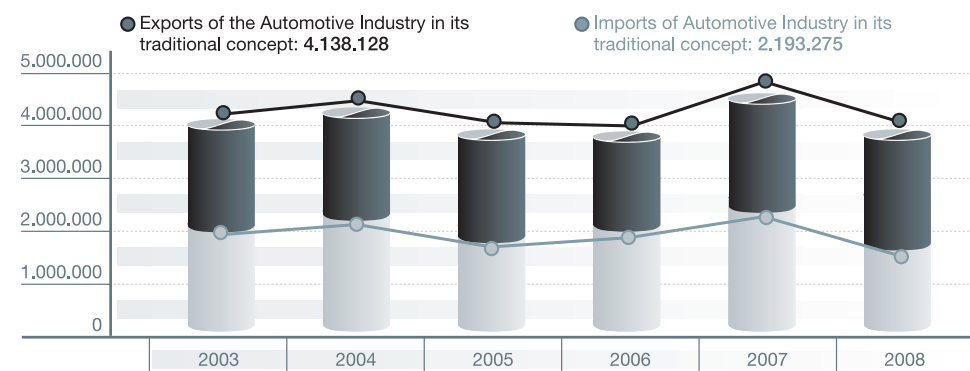
The productivity **figures** for the whole of the sector show continuous growth over the last 3 years to reach a level slightly above €54,000 per employee, though there are great differences in this area:

- The **motor vehicle manufacturing sub-sector** reveals a figure of a little over €90,000 per employee, showing the high productivity of the General Motors factory in Figueruelas.
- The **equipment and components sub-sector** reaches some €49,000 per employee, though it must be highlighted that the trend here is positive in this indicator - achieving continuous growth as a result of unceasing efforts from these companies to improve their productivity.
- The **associated services** have a much lower level of productivity - due to the type of activity here - with a level just above €41,000 per employee, with a slight downturn in these figures.

As for the figures for **foreign trade**, it must be noted that the automotive sector comprised over half of the exports from Aragon in 2008, contributing to a trade balance with a surplus of nearly €2,000 million, something which has been increasing over the last 3 years.

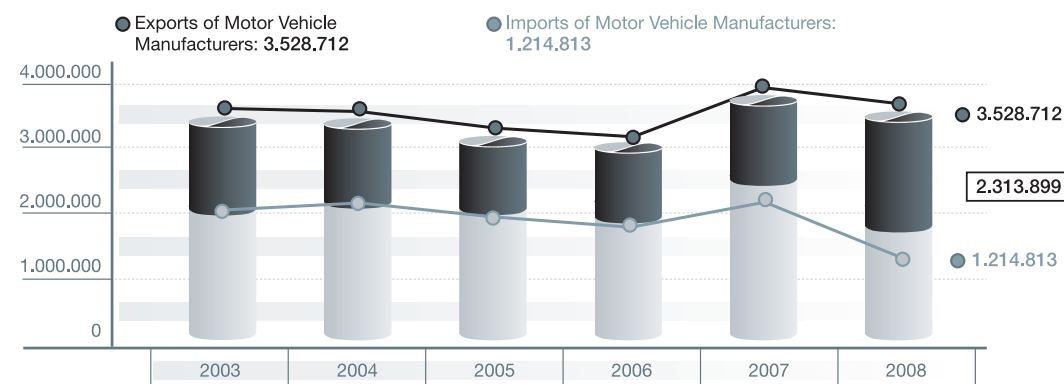
Automotive Sector Trade Balance Data in 000s of Euros.

Source: Foreign Trade database from the Upper Council of the Chambers of Commerce plus data from Customs.



Trade Balance of motor vehicle manufacturers. Data in 000s of Euros.

Source: Foreign Trade database from the Upper Council of the Chambers of Commerce plus data from Customs.



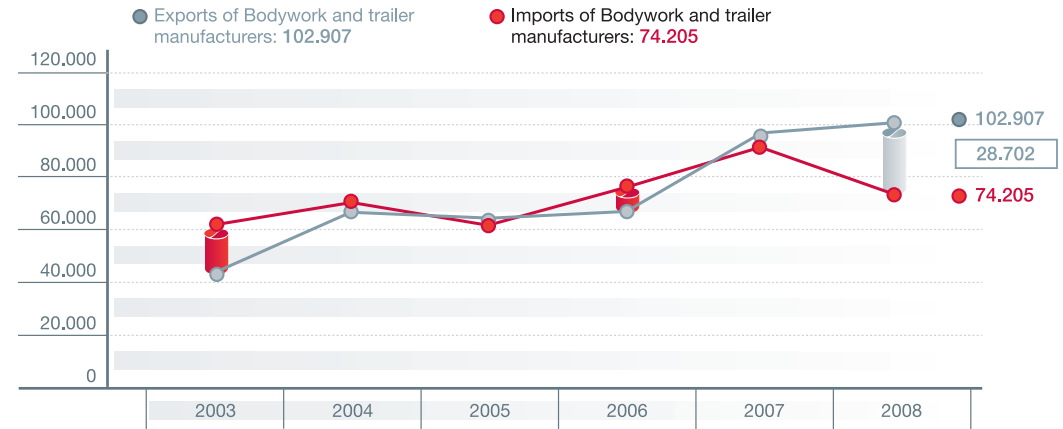
Here, the highlight is the increase in the surplus that **motor vehicle manufacturing** has experienced, largely down to the destination of the vehicles manufactured by General Motors, 85 % of which are exported, and the **bodywork and trailer manufacturers**, who have gone from a deficit to a surplus from 2007, showing the potential in this area of activity in Aragon.

The **equipment and component manufacturers** showed some surplus in 2005, but have suffered ever greater deficits since then; this piece of data gives the Cluster a chance to study how to increase exports - through international expansion - and reduce imports - through "regionalising" the components that are currently imported (e.g.: engines).

Definitively, per the figures shown, it can be seen how robust the automotive sector is in Aragon, though it must be remembered that the effects of the deceleration starting from the beginning of 2009 are not reflected in these numbers as the most up-to-date statistical indicators are unavailable. This information will be updated in the next version of this activities report.

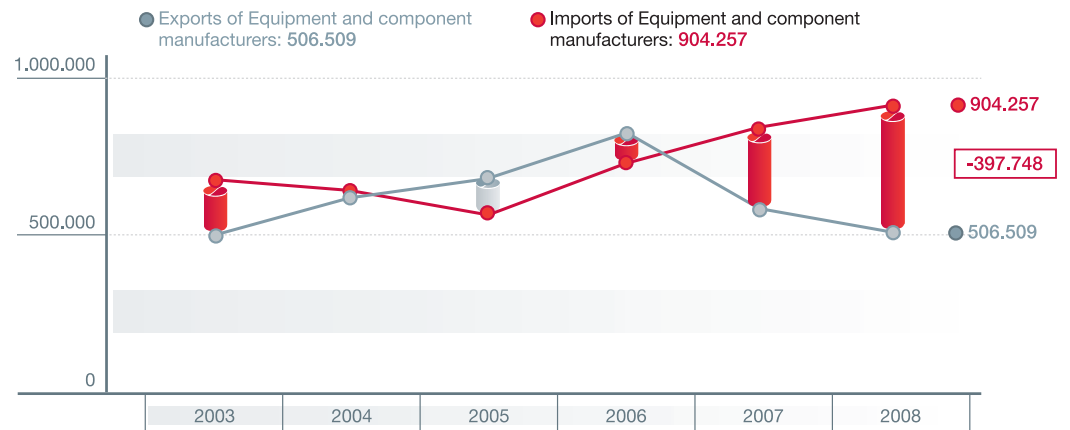
Trade Balance of the bodywork and trailer manufacturers. Data in 000s of Euros.

Source: Foreign Trade database from the Upper Council of the Chambers of Commerce plus data from Customs.



Trade Balance of the equipment and component manufacturers. Data in 000s of Euros.

Source: Foreign Trade database from the Upper Council of the Chambers of Commerce plus data from Customs.







THE ARAGON AUTOMOTIVE CLUSTER

The **Aragon Automotive Cluster** —CAAR— is an Innovative Business Consortium (I.B.C.) whose main objective is to increase the degree of competitiveness among the companies through the promotion of co-operation, project development and joint ventures, improving the image and international visibility of its members and, in general, performing all those activities that contribute to the improvement of results and activity development within the members of the Cluster.

The Aragon Automotive Cluster was legally constituted on 26 March 2008. Initially, the Cluster comprised 14 companies and 6 bodies from Aragon. Today, this non-profit organisation comprises 28 partners.

The idea of forming a Cluster in the automotive sector in Aragon was in the minds of the main players in the Aragon economy: the Chamber of Commerce and Aragon Abroad had noticed a certain concern among companies and the Aragon Institute of Technology (AIT) - during a diagnosis of the car component suppliers sector (end of 2006) - identified this possibility as a lever to improving sector competitiveness.

In 2007, prior to the formal creation of the Cluster, as an initial step and with the involvement of over 50 companies from the sector, the CAAR Strategic Plan was created - qualified as excellent by the Ministry of Industry - and this allowed for the acquisition of the qualification as an Innovative Business Consortium (I.B.C.).

strategic objectives

The creation of the Strategic Plan was the result of an exhaustive internal and external analysis, concluding with the definition of the strategic lines for the I.B.C. and the programmes and projects necessary for the achievement of these objectives.

The proposed strategic objectives were the following:

1. **Fostering R&D&I in the automotive sector in Aragon.** Situating the technological and innovation levels at the same height as that of the competitors in the global market.
2. **Improvement in the operational efficiency of the companies linked to the CAAR.** Increase collaboration and networking both at the Inter-business level and between companies and the scientific-technological possibilities on offer.
3. **Adaptation of the processes and products to the opportunities derived from the new environmental regulations.**
4. **Improvement in the management and qualification of the Human Resources.** Training, dissemination, and sector awareness activities.
5. **Boost the exploitation of new technologies.** Especially technology for IT and communications, and for design and new materials.
6. **Becoming responsible for knowledge of the area** with the goal of spotting new projects and business and spreading this among the partners.
7. **Improving the competitiveness of the companies in the international market.** Position the companies at the top of the market.





These basic lines of attack became specific, in turn, through projects - aimed at establishing areas in which companies could collaborate without losing their individuality. Matters such as knowledge, communication, international expansion, personnel management, the brand and the image are areas of horizontal management, though the majority of the companies lying within Aragon are SMEs and lack sufficient critical mass to tackle all these matters: thus, the need to create this cluster.

The proposed programmes and projects to achieve the strategic objectives - and on which the CAAR is currently working - are the following:



Areas for action

1 Formation and energising the Cluster

2 Fostering the R&D&I

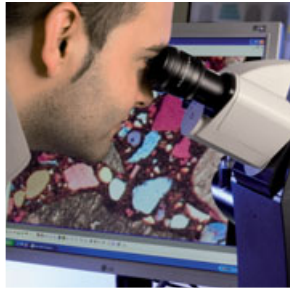
3 Foreign development

Actions to be pursued

- Ratification of the Consortium.
- Energising the Cluster. Establishment of assessment services.
- Spreading and promoting the Cluster.

- Coordination of the scientific-technological possibilities.
- Company-body R&D collaboration projects.
- High added value support services for R&D.

- Designing an international expansion Plan for the sector.
- Development of a series of activities for international expansion.



4

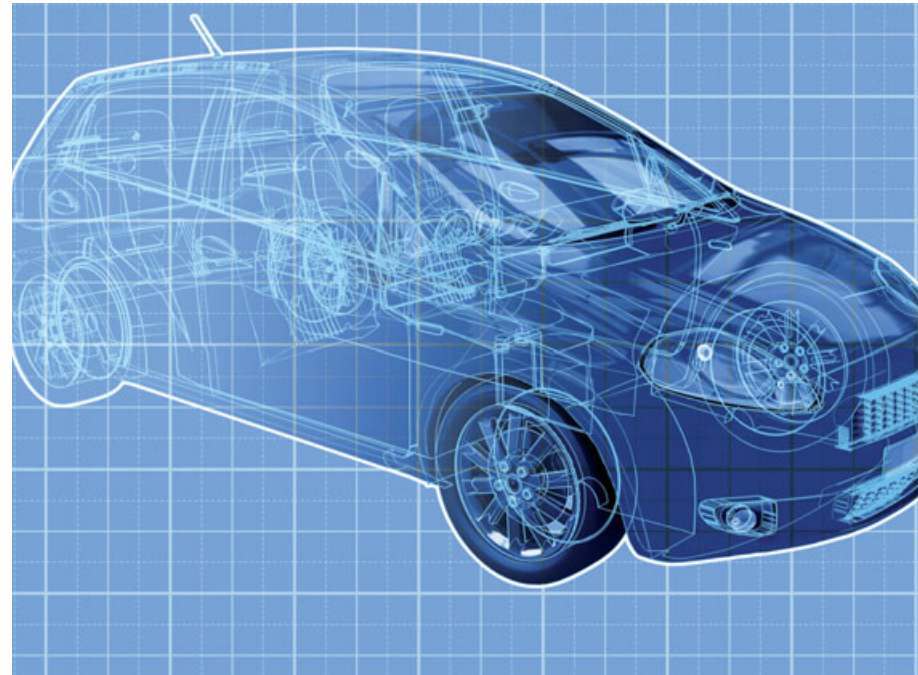
Increase in qualification of the HR

- Analysis of training needs.
- Development of training activities.
- Exchange of good practices in the management of the HR.

5

Operational efficiency

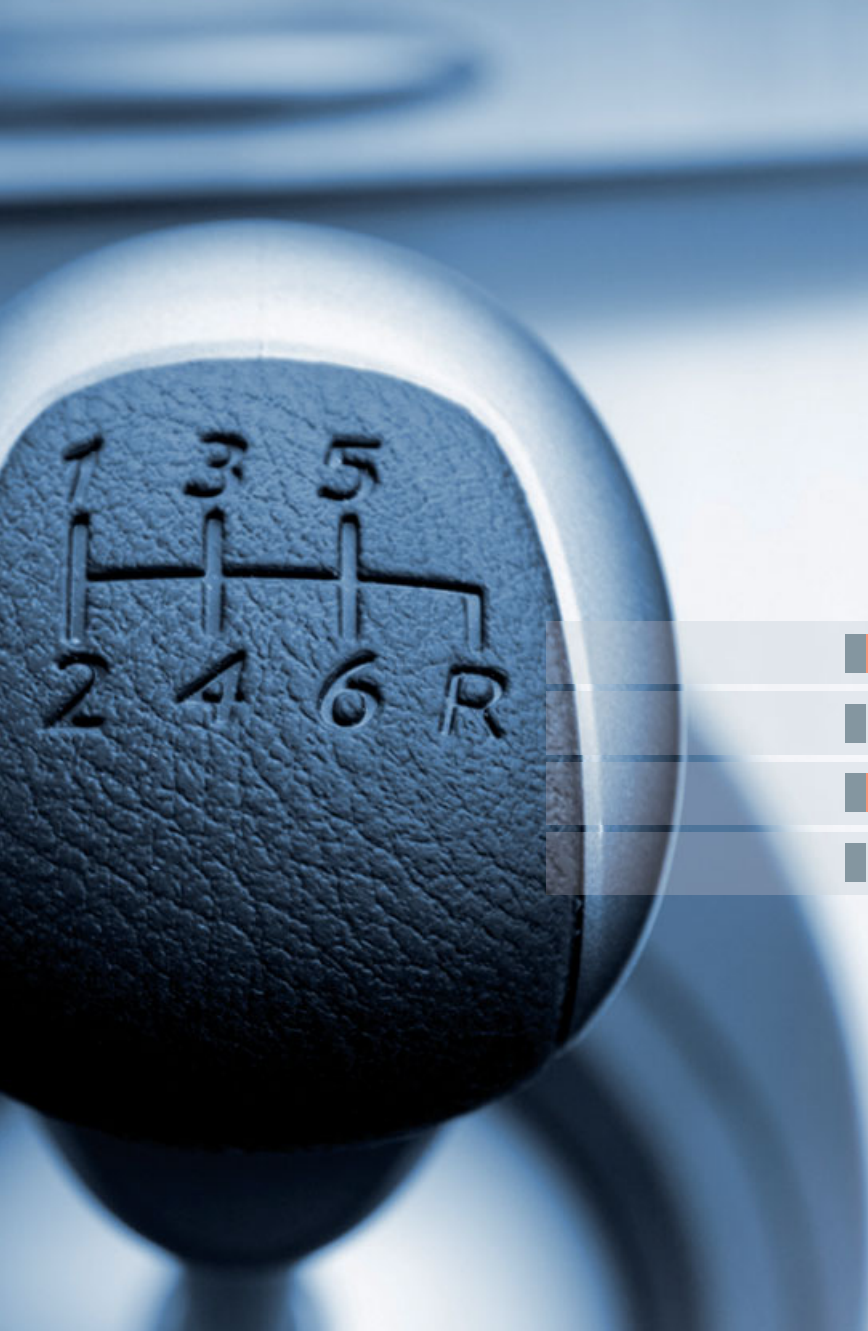
- Facility Management Project.
- Improvement in energy efficiency.
- Diversification Project.
- Improvement in productivity.





WORK COMMITTEES

CAAR PROJECTS 2008 - 2009



The projects undertaken since the founding of the Cluster have been co-ordinated by the various work committees, which have been designed in accordance with the the approved action areas:

- International expansion
- R&D&I
- Human Resources
- Operational Efficiency

These work committees meet regularly and companies interested in each of the identified areas participate in them.



INTERNATIONAL EXPANSION COMMITTEE

The objectives of the International Expansion Committee are:

1. Encountering new markets and customers.
2. Undertaking projects to find new procurement sources.
3. Establishment in emerging countries.

During the first meeting of the Committee, held in June 2008, the 12 companies participating in the Committee identified specific areas of interest in which to undertake particular activities:

- **Morocco:** situation of the automotive sector and new implementations.
- **South Africa:** market research and participation in the major Fair in the sector.
- **Japan and Korea:** contact with top level constructors and suppliers to analyse possibilities for collaboration.



Morocco

- The Cluster participated in the "I Hispanic - Moroccan Meeting of the Automotive Sector", held from 28 to 30 October 2008 in Morocco, where meetings were held with over 50 Moroccan companies.
- Renault – Nissan presented their project for the opening in 2011 of a new vehicle assembly plant in Tangiers, with production estimated to reach 400,000 vehicles/year and they invited the Spanish companies to participate in the project.
- Members of the Moroccan Ministry of Industry reported on the economic advantages accrued from emplacement in Morocco and the Moroccan automotive association supplied a general overview of the sector in Morocco and of the needs of their companies.
- Currently, 3 Cluster companies have production plants in Morocco and continue to perform specific activities as per the requirements of other companies in the Cluster.

South Africa



- In November 2008, with the support of Aragon Abroad (AA) and the Chamber of Commerce, four Cluster companies (MIJU, FERSA BEARINGS, FABRISEM and MOLDES CEREZA) participated in the "Johannesburg International Motor Show 2008", the most important Automotive fair for the whole of Sub-Saharan Africa.
- They hired a stand measuring 100 m² as a "meeting point" for the previously arranged interviews, as well as preparing a catalogue with the participating companies from Aragon. Market reports for each participating sub-sector were assembled in advance.
- The overall balance was positive: in addition to the good quality contacts acquired, it continues to be an interesting market to reach the south of Africa and future activities are by no means discarded.

Japan and Korea:

- The CAAR asked the Zaragoza Chamber of Commerce and AA to undertake a specific trade mission to Japan and Korea, having detected the minimal relations existing between companies from Aragon and the Japanese and Korean constructors.
- Documents were compiled on the situation of the automotive sector in Japan and Korea, analysing the main players in the sector both among the constructors and the equipment and component manufacturers.
- In November 2009, four Cluster partners travelled to Japan and Korea where they held interviews with the major vehicular companies in the two countries (Toyota, Nissan, GM-Daewoo) and with the major technology centres in order to establish possibilities for collaboration - both in the plants over there and in their European subsidiaries.

The second meeting of the Committee evaluated the activities of 2008 and the first half of 2009 previously described and defined new activities to be undertaken during 2010:

- Russia: during the Opel crisis and upon the appearance of Magna, this was identified as a priority destination for Corsa suppliers; following the collapse of the agreement, Russia continues to be a destination of interest - both for primary equipment and spare parts.
- Germany: an interesting market for the sheer volume of the car sector. The possible creation of a Trade Office to represent Cluster companies who have no presence there will be analysed.
- Other areas of interest: Brazil, Mexico, China, India.





R&D&I COMMITTEE

The R&D&I Committee meets quarterly on a rotating basis in the premises of one of the CAAR partners. Since its founding, the Committee has visited the premises of MOLDES J. CEREZA, FERSA BEARINGS, CEFA, ALUMALSA, and TATA HISPANO where first hand knowledge of the products, capabilities and activities of these companies has been acquired, while strengthening the co-operative links between CAAR companies.

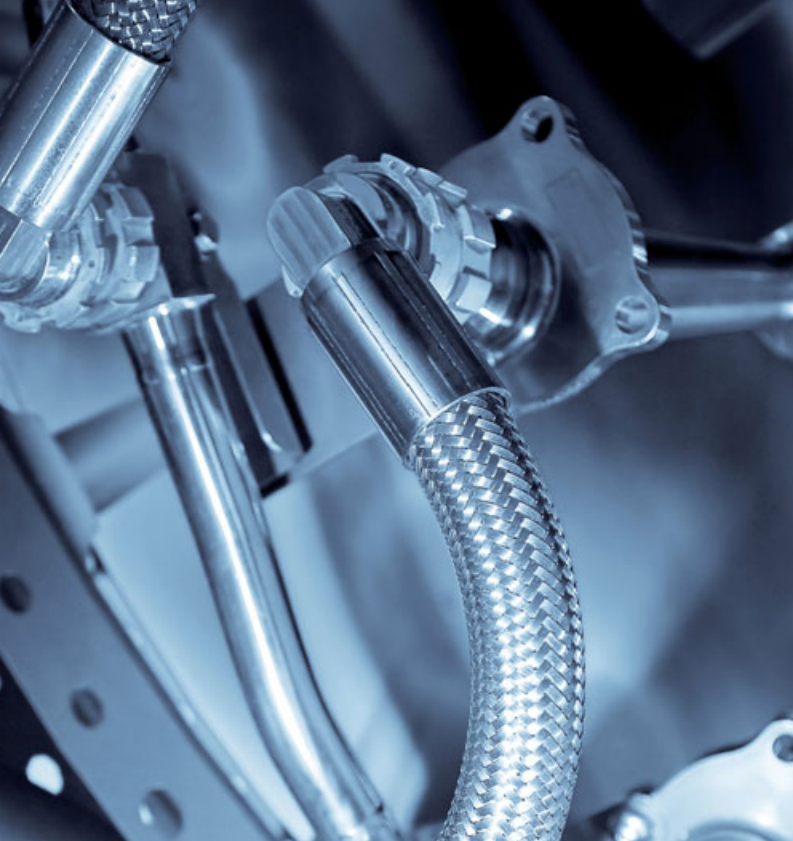
In line with the founding objectives of the CAAR to foster new technology and strengthen the technological availability and the impetus for the introduction of innovation, the companies and Technological Centres belonging to the Committee have focused on the development of:

1. New manufacturing processes.
2. New materials.
3. New product concepts.
4. New propulsion systems: hydrogen, electric, hybrid; special attention paid to the GREEN CARS initiative.



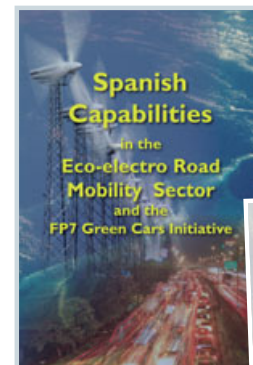
The first project developed by the CAAR within the Committee was the **“iMotor: A project to promote a culture of innovation among the companies as a driving force for competitiveness”**. Presented before the Regional “Innoempresa” board, the project received partial funding to undertake the following activities:

- Creation of a technology surveillance system
- Self-diagnosing technology (HEVATEC): agreement with Fitsa and access to the tool
- Co-operative product development tool: adapting the co-operative environment for product development
- General diagnosis of the sector and reason for innovation



The crisis experienced by the sector at the end of 2008 and in the first few months of 2009 and the need to energise and adapt the sector to the new challenges (more ecological vehicles, drop in demand) were key factors behind the central government in January 2009 launching the **Automotive Sector Competitiveness Plan**, a system of aid packages for the companies in the sector - with €800 million split between funding and subsidies. The CAAR co-ordinated the presentation of the technical and economic reports of its partners, with a favourable balance of 10 projects approved with aid of more than €20 million - of a total of 15 projects approved in Aragon and an aid package total of €24 million.

The CAAR also participated in the first quarter of 2009 in the **Conference on Electric Propulsion organised by Tecnoebro**, which was very successful and well attended (over 200 people). In fact, with the interest generated and the capabilities shown both by the companies from Aragon and the scientific-technological personnel of our Autonomous Regions, a guide was prepared featuring abstracts of the speeches given and Spanish capability - both of the companies and the Technological Centres - and presented to Mr Andrés Siegler, Head of Transport Research for the EU, at the infodays in Brussels and Madrid in September 2009. This guide was sponsored by the Aragon Government Department of Science, Technology and University.



HR COMMITTEE

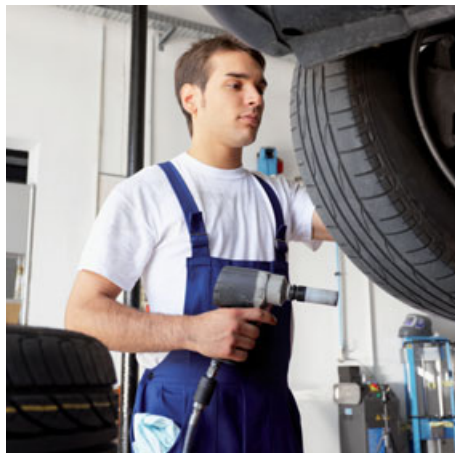
Two working meetings have been held by the HR Committee in the last 12 months. During the first, the various participating companies (a total of 10 companies and bodies) introduced themselves and established the objectives of the Committee:

1. Exchange of **good practices** in the management of training, labour flexibility and compensation.
2. Liaising with the business organisations responsible for negotiating group agreements.
3. Improving, generally speaking, the quality of the HR in the CAAR companies: spotting the **training needs**.
4. Information zone for new initiatives with a bearing on HR: **Equality Act**.

INAEM (Aragon Institute of Employment) was present at the first meeting and showed the CAAR companies its services in the areas of training, recruiting and appointing personnel and the IT tool **PLANDIFOR**, which allows for the evaluation of personnel, detection of shortfalls in employees and creation of the consequent training plan. As a result of this presentation and in conjunction with the INAEM, it was decided to create a study to assess the training needs of the automotive companies in Aragon, the results of which have been used to establish a Training Plan for the sector with special consideration paid to:

- HR management skills and competences
- Quality and Continuous Improvement
- Health and Safety
- Production / Logistics





STUDY OF THE TRAINING NEEDS IN THE AUTOMOTIVE SECTOR

This study highlighted the differences between the small, medium and large companies (in terms of number of contracted workers) with regard to planning, execution and evaluation of the results of training.

Thus, it was seen that companies with fewer than 50 employees are those which lack a training plan, while the medium and large companies have relatively up-to-date planning.

Differences were also noted in the difficulties or barriers impeding the execution of the necessary actions: timetable incompatibility (course participation vs. undertaking of tasks at work) is the primary inconvenience to the companies as regards undertaking training activities. In order to stimulate training, the companies consulted recommend practical training, with specific courses connected to job positions, which are low cost for the company and have good timetable flexibility.



Likewise, the CAAR has co-ordinated the participation of various companies in the **“Compensation Benchmarking for the automotive sector in Aragon: Analysis of the main HR policies”** study undertaken during 2008 and 2009 by the Zaragoza Chamber of Commerce and a national consultancy firm. The results of this study have allowed CAAR companies to identify areas for improvement in their HR policies and these are being used in the development of new projects by the Committee which will be presented over the course of 2010.



OPERATIONAL EFFICIENCY COMMITTEE

The primary objective of this Committee is to benefit from the existing synergy between CAAR companies so as to share means and resources in joint ventures.

The 28 companies belonging to the CAAR jointly invoice over €700 million and have over 4,500 employees. Therefore, in the first meeting of the Committee, projects which could be developed jointly - without affecting the strategic aims of the companies - were identified.

The first project undertaken was the **“Improvement in General Services’ Efficiency”**, with the participation of 7 CAAR companies.

Various General Services common to the companies were examined based on a specifically designed questionnaire identifying levels of service according to: criticality, response time, speed of solution and availability of services analysed in order to later undertake joint negotiation based on the minimum requisites of the participating companies.

Improvement in in-company energy use and a reduction in CO2 emissions and operating costs were the main reasons behind the **“Energy efficiency improvement project: rational use of energy”**. In this project, various audits were performed on energy consumption in the participating companies at their Supply Points, with the intention of defining in general terms the state of the company and proposing initial measures to improve energy use.

Later, there was an in-depth examination of the Significant Energy Consumption Points - wherein complementary measures were proposed to improve the initial situation even more. The success of this project has led to various CAAR companies now performing energy audits in their plants to rationalise their energy consumption.

Lastly - and because of the crisis affecting the sector, the uncertainty caused by the failed sale of Opel and the high level of dependency of the CAAR companies on automotive products - the Committee decided to establish an ambitious **Diversification Plan**, whose first phase was undertaken in 2009. The main objective of the project is the locating of routes for diversification into other sectors for the companies that comprise the Automotive Sector in Aragon: firstly, with a strategic plan, then onto specific plans for each interested company which will allow opportunities for growth in other sectors to be identified and reduce the risk associated with dependency given the variation in demand for vehicles and the pursuits of the constructors. The now-concluded first phase will be presented to the companies and society-at-large during an open doors day in 2010.

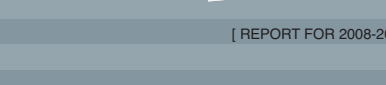
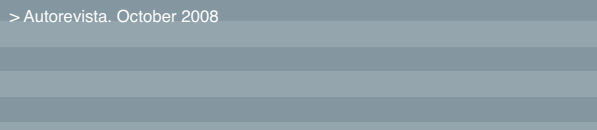




THE CAAR IN THE MEDIA

During 2009, the economic recession has been the focus of attention for the news in all the economic and general press; the automotive sector has not escaped this trend and has been one of the most affected by the economic situation currently being experienced. Therefore, the media have paid particular attention to our sector, as well as the activities, projects and decisions that might be taken to improve one of the key sectors in the economy in Aragon.

As can be seen in the press dossier compiled by the Cluster, the press have stressed the action plan that we in the association have established to reactivate our sector; there has also been regular monitoring of our R&D&I projects - such as the competitiveness plan - and, naturally, the GM crisis and how this might affect the auxiliary industries.



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HERALDO

DE ARAGON

Avda CEV - 50 004 - 500 00

Martes 17 de marzo de 2009

Las Cámaras aragonesas exigen un plan de choque para salvar 40.000 empleos en automoción

El sector reclama la intervención urgente del Gobierno aragonés ante la caída de las ventas en un 42%

Entre otras medidas, piden ayudas para la compra de vehículos nuevos

Las Cámaras de Comercio aragonesas han comenzado un plan de actuación para elevar a la DGA y entre todos tratar de salvar la cadena de valor del sector de la automoción. Las Cámaras, por su parte, han elaborado un plan de actuación que se presentará al Gobierno aragonés, con el fin de salvar 40.000 empleos en Aragón. El plan de actuación se divide en tres ejes: el primero, el segundo y el tercero. El primero se refiere a la compra de vehículos nuevos, el segundo a la compra de vehículos usados y el tercero a la compra de vehículos nuevos.

El Gobierno aragonés ha comenzado un plan de actuación para elevar a la DGA y entre todos tratar de salvar la cadena de valor del sector de la automoción. Las Cámaras, por su parte, han elaborado un plan de actuación que se presentará al Gobierno aragonés, con el fin de salvar 40.000 empleos en Aragón. El plan de actuación se divide en tres ejes: el primero, el segundo y el tercero. El primero se refiere a la compra de vehículos nuevos, el segundo a la compra de vehículos usados y el tercero a la compra de vehículos nuevos.

El Ayuntamiento limita a parques y monumentos la videovigilancia

El alcalde de Zaragoza prohíbe la videovigilancia en parques y monumentos. El alcalde de Zaragoza prohíbe la videovigilancia en parques y monumentos. El alcalde de Zaragoza prohíbe la videovigilancia en parques y monumentos.

Rajoy quita hierro a lo que llama campañas "de acoso"

El líder del PP defende la libertad de expresión y el derecho a la crítica. El líder del PP defende la libertad de expresión y el derecho a la crítica. El líder del PP defende la libertad de expresión y el derecho a la crítica.

Un periodista lea el poder a la izquierda en El Salvador

El periodista lea el poder a la izquierda en El Salvador. El periodista lea el poder a la izquierda en El Salvador. El periodista lea el poder a la izquierda en El Salvador.

Orgullo y añoranza en el centenario del Centro Aragonés en Barcelona

Ayer, en el centenario del Centro Aragonés en Barcelona, se celebró una gran fiesta. Ayer, en el centenario del Centro Aragonés en Barcelona, se celebró una gran fiesta. Ayer, en el centenario del Centro Aragonés en Barcelona, se celebró una gran fiesta.

HERALDO DE ARAGON

17 de marzo de 2009

ECONOMÍA

La crisis del automóvil

La Cámara aboga por dar ayudas directas para reactivar la automoción

Considera que ofrecer subvenciones a la compra de coches es la mejor forma de incentivar la demanda

Manuel Tenel reclama un fondo de financiación específico para el sector y vuelve a apostar por la I+D

La Cámara de Comercio de Zaragoza reclama un fondo de financiación específico para el sector y vuelve a apostar por la I+D. La Cámara de Comercio de Zaragoza reclama un fondo de financiación específico para el sector y vuelve a apostar por la I+D. La Cámara de Comercio de Zaragoza reclama un fondo de financiación específico para el sector y vuelve a apostar por la I+D.

El presidente de la Cámara de Comercio de Zaragoza, Manuel Tenel, reclama un fondo de financiación específico para el sector y vuelve a apostar por la I+D. El presidente de la Cámara de Comercio de Zaragoza, Manuel Tenel, reclama un fondo de financiación específico para el sector y vuelve a apostar por la I+D. El presidente de la Cámara de Comercio de Zaragoza, Manuel Tenel, reclama un fondo de financiación específico para el sector y vuelve a apostar por la I+D.

El aumento de las ventas elimina un día de vacaciones en GM

El comité, presidente de la próxima reunión sobre la segregación. El comité, presidente de la próxima reunión sobre la segregación. El comité, presidente de la próxima reunión sobre la segregación.

Zaragoza podría celebrar un salón de vehículos de ocasión en la Feria

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HERALDO DE ARAGON

17 de marzo de 2009

ECONOMÍA

Las Cámaras proponen a la DGA un plan para salvar la automoción y sus 40.000 empleos

Demandan ayudas directas a la compra y crear fondos de apoyo a la financiación y a la internacionalización

Las Cámaras de Comercio de Zaragoza proponen a la DGA un plan para salvar la automoción y sus 40.000 empleos. Las Cámaras de Comercio de Zaragoza proponen a la DGA un plan para salvar la automoción y sus 40.000 empleos. Las Cámaras de Comercio de Zaragoza proponen a la DGA un plan para salvar la automoción y sus 40.000 empleos.

Una feria de ocasión "a coste cero" para los concesionarios

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Ante la caída de ventas del 42%, urge actuar

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> Heraldo de Aragón. 17 March 2009

> El Periódico de Aragón. 17 March 2009

> Heraldo de Aragón. 17 March 2009



La feria del automóvil de Aragón tratará de reducir los stocks
A. C. Zaragoza

“Estoy convencido de que Figueruelas superará la crisis”

Antonio Cordero / Espreso

Juan Manuel BLANCHARD
Presidente del Círculo del Comercio de la Automoción de Aragón
Dirige Catalana del Norte, una empresa fundada en 1946 que empezó en la fabricación de juguetes, pero dio un giro hacia los componentes de la automoción en 1982

¿A dónde deberían ir sus negocios?
A. C. Hay algunas empresas y muy chicas, como las que hacen de intermediarios, que han demostrado su eficiencia en Europa. En España, en el momento de la crisis, hay que saber que no se trata de un momento de crisis, sino de un momento de ajuste. Hay que saber que no se trata de un momento de crisis, sino de un momento de ajuste. Hay que saber que no se trata de un momento de crisis, sino de un momento de ajuste.

La industria vive un momento de respiro por las ayudas directas de algunos países?
A. C. La industria vive un momento de respiro por las ayudas directas de algunos países. La industria vive un momento de respiro por las ayudas directas de algunos países. La industria vive un momento de respiro por las ayudas directas de algunos países.

¿A dónde debería ir la empresa?
A. C. La industria debería ir a donde debería ir la empresa. La industria debería ir a donde debería ir la empresa. La industria debería ir a donde debería ir la empresa.

de la crisis se ha visto afectada una gran parte de la industria. La industria se ha visto afectada por la crisis. La industria se ha visto afectada por la crisis.

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Apoyo del Plan del Automóvil
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Políticos, empresarios y sindicatos reclaman al Gobierno de España más contundencia para que Magna cambie su plan para la fábrica zaragozana
Por M. Lorente

“Hay que pelear una vez más por Figueruelas”

Los agentes sociales de Aragón, incluido el UGT, se han comprometido a no volver a la planta de General Motors en Figueruelas si no se garantiza la continuidad de la actividad en la zona. Los agentes sociales de Aragón, incluido el UGT, se han comprometido a no volver a la planta de General Motors en Figueruelas si no se garantiza la continuidad de la actividad en la zona.

¿El Gobierno de Aragón debería intervenir?
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GARANTIZAR EL TRABAJO Y EL FUTURO

ALBERTO LARRAZ
Consejero de Economía, Industria y Comercio del Gobierno de Aragón

JESÚS MORTE
Presidente de la Confederación de Empresarios de Aragón (CEA)

J. MANUEL BLANCHARD
Presidente del Círculo zaragozano de la Automoción y director de CCA



J. MANUEL BLANCHARD
Presidente del Círculo zaragozano de la Automoción y director de CCA

JULIÁN LÓRIZ
Secretario general de la Unión General de Trabajadores de Aragón

JULIÁN BUEY
Secretario general de la Confederación de Empresarios de Aragón



FIGUERUELAS

NO AL PLAN DE MAGNA

OPEL

“Es urgente que las autoridades españolas al máximo nivel actúen”
“Hay que defender Figueruelas en la situación más dura de sus 28 años”
“Sindicatos y gobiernos han de desplegar todo su potencial negociador”

Mis Mensajes del Gobierno
En estos días, el Gobierno de España ha estado enviando mensajes muy claros a la industria. El Gobierno de España ha estado enviando mensajes muy claros a la industria.



NEW CHALLENGES FOR 2010

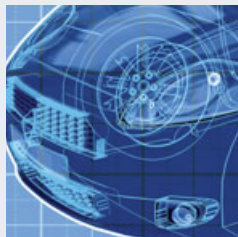
HOWEVER, THE CAAR, JUST LIKE THE AU- TOMOTIVE SECTOR, KEEPS GOING

Great changes are happening in our sector, including the arrival of new competitors due to growing globalisation, regulatory and legal pressure on cars, the appearance of alternative products that are developing new mobility models and a growing need to invest more - if possible - in R&D&I.

In addition to these circumstances, there are problems on the demand side - and this has shown a considerable worldwide downturn recently: this must serve as an extra motivator to work even harder and to continue to consolidate this collaborative project.

While, in addition, it is true that all the vehicle manufacturers in the country have their decision-making hubs outside Spain, the CAAR, with the backing of national and regional administrations, will establish various programmes with the objective of:

- a) **Increasing the value added of products and services**, in order to generate greater riches and exclusivity in the supply.
- b) **Raising competitiveness, efficiency and sustainability of the production processes** to balance the greater labour costs.
- c) **Redirecting production towards more sustainable vehicles** (hybrids, electrical and lower emissions), those that we consider now to be the future.
- d) **Improving the technical capabilities of the human resources**, so as to allow them to perform at higher levels in their various positions and with a higher degree of productive specialisation.



Thus, in 2010, the CAAR will present the **First Phase of the Diversification project**, mentioned elsewhere in this document in the Operational Efficiency Commission, and will launch the **Second Phase**, whose objective is the undertaking of a diagnosis by production family of the sectors chosen in the first phase - both at technical and business levels. Likewise, the CAAR, in collaboration with the Aragon Council of Chambers, will reveal the results - some already given in this report - of the **“Thermometer of the automotive sector in Aragon”**: the first study of this level undertaken in our Autonomous Regions with information related to all the players in the vehicular value chain. This project intends to set some indicators which will allow for continuous monitoring of the situation in the sector so that measures may be taken as and when they are opportune.

The CAAR work committees will continue to move forward in the projects revealed in this report and other proposals from the last few weeks, such as the holding of an **R&D Green Cars – Green Aircraft** conference, with the collaboration of the AERA Cluster, the launching of the **Rapid Manufacturing** project, or the co-ordination of the **aid packages for 2010**.

In addition, a **fifth committee for Quality and the Environment** will be established, and, naturally, there will continue to be news about the CAAR project revealed to the companies in Aragon in the sector so that a greater number of our companies and bodies may benefit from the initiatives being undertaken.

We look forward to being able to present these in the activities report for 2010.

Best wishes,

David Romeral
MANAGING DIRECTOR OF THE CAAR

■ Members of CAAR (30 June 2010):



■ Collaborators:





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